

InSite Variable Data Print 3.0

System Administration Guide

English

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Contents

1 Overview 1

Who Should Use This Guide 2
What Is Variable Data Print? 2
How Do I Use Variable Data Print? 2
Variable Data Print Components 3
Web Browser Compatibility 3
Security 3
Responsibilities 4
Security Requirements 4
About Firewalls 4
About Strong Passwords 5
About Microsoft Hotfixes 5
About DMZ Network Configuration 6
About SSL Certificates 6
Frequently Asked Security Questions 7

2 Setting Up and Maintaining the System 9

Starting InSite Creative Administration 10
Viewing and Adding Licenses 10
Creating Customer Profiles 11
Monitoring System Activity 11
Generating Usage Reports 11
Restarting Variable Data Print 12

3 Configuring the System 13

Overview 14
Editing Your Company Contact Information 14
Changing Session Timeouts 15
Specifying JPEG Download Options 15
Configuring Thumbnail Caching 15
Changing File Delete Times 16

4 Managing Users 19

About Roles 20
Creating Roles 21
About User Rights 23
Default Roles 25
Assigning Roles to Typical Staff Users 26
Creating a Staff User Account 27
Full-Access Staff User 27
Limited-Access Staff User 27
Multi-Customer User 28
Assigning Roles to Typical Customer Users 29
Customer Administrator 31
Typical Users In a Sample System 32
Tell Me More About Assigning Roles 33

5 Setting Up Event Notification and Reporting 35

About Event Notification 36

Notification Formats....36
Configuring the System to Send E-Mail Messages....37
Configuring Notification Delivery Times....38
Configuring the Notification Settings for a Role....38
Viewing and Overriding Notification Settings....38
Event Type Descriptions....39
About Event Reporting....40
Generating an Event Report....41
Customizing E-Mail Messages....42
Adding Languages....44

6 Customizing the User Interface 47

Overview....48
Applying the New Look....48
Modifying the Default Theme....48
Customizing the Web Interface Logon Page....50

7 Backing Up the System 53

Overview....54
Triggering the System Backup Process....54
Setting Up Your Data Backup Process....55
What To Do If Backup Fails....56

A Configuration Settings 57

Overview....58
Printer Information....58
Security....59
System and Networking....60
Co-operating Systems....62
Workflow....63
Rendering....64
Notification....65
eCentral....66
Distribution Server....67
Color Management....67

Glossary 69

Index 71

1 Overview

Who Should Use This Guide 2
What Is Variable Data Print? 2
How Do I Use Variable Data Print? 2
Variable Data Print Components 3
Web Browser Compatibility 3
Security 3

Who Should Use This Guide

This guide is intended for anyone who administers the Kodak® InSite™ Variable Data Print 3.0 system. It explains how to use the administration software and points out procedures that are specific to your Variable Data Print system.

This guide applies to Variable Data Print 3.0 running in a stand-alone environment.

Note: This document assumes that you are running the Variable Data Print system without the Kodak InSite Creative Workflow system or the Kodak InSite Asset Library software. If you are running Variable Data Print in conjunction with Creative Workflow, you should refer to the *Creative Workflow and Asset Library 3.0 System Administration Guide* instead.

To use this guide, you should be familiar with the Microsoft® Windows® operating system.

What Is Variable Data Print?

Variable Data Print enables you and your team to create variable data print (VDP) templates within projects, and make them available to other users to create personalized print items.

The Variable Data Print software runs on its own server, and multiple users can access it at once through a Web browser. You can access Variable Data Print through a Web browser on a computer running either the Apple® Mac OS® X or Windows operating system.

How Do I Use Variable Data Print?

To create a variable data print (VDP) template, you must first create a template file in Adobe® InDesign® CS2 software on a computer running the Microsoft Windows operating system. (This does not need to be the same server on which Variable Data Print is installed.) You use the Kodak Darwin™ software in conjunction with InDesign to define the template's content—any fixed text and images, any variable text and image fields, and the content that you want to make available for selection in each variable field.

When you are finished creating the InDesign template, you export a Darwin **.drwn** job file to WCS, and save the Darwin job to a desired location. The Darwin **.drwn** job file contains the InDesign template, any static fonts and images used in the template, and the variable field schema and rules. (For information about creating templates in InDesign using Darwin software and exporting Darwin job files, see the *Darwin VI Authoring Tool for Adobe InDesign User Guide*.)

You then upload the **.drwn** job file into a project. The Darwin job is automatically registered with the Web Composition Server (WCS)—the Darwin engine that is installed on your Variable Data Print server. This enables Variable Data Print to display the template's variable text and image fields and the content that is available for selection in each field.

You then complete the creation of the VDP template, and make the template available for other users to create personalized print items.

For detailed instructions on uploading a Darwin job to a project, creating a VDP template, making the template available for personalization, and creating a print item based on a VDP template, see the Variable Data Print Help.

Variable Data Print Components

Variable Data Print consists of the following software and hardware components:

- Variable Data Print: the main software. This is what your customers and staff use.
- InSite Creative Administration: software for configuring and managing the system
- Variable Data Print server: the Web server on which the Variable Data Print system is installed

Web Browser Compatibility

Variable Data Print and InSite Creative Administration are Web-based software that can be viewed on multiple platforms and browsers. Table 1 lists the Web browsers that you can use to access Variable Data Print and InSite Creative Administration.

Note: This information is subject to change. For the latest information about compatible browsers, ask your service representative.

Table 1: Recommended browsers

Software	Windows Browsers	Macintosh Browsers
Variable Data Print	Microsoft Internet Explorer® Internet browser 5.0 or later	Apple Safari™ software
InSite Creative Administration	Internet Explorer 5.0 or later	Not supported

Security

This section outlines important security considerations when setting up Variable Data Print in a stand-alone environment (no integration with Storefront). Since Variable Data Print transmits data over the Internet, it is essential that you have appropriate security in place to safeguard your data and your customers' data.

Responsibilities

Data handled by Variable Data Print software may be of considerable value to your customers. You must take appropriate security measures in order to use Variable Data Print.

Although every effort has been made to ensure security within Variable Data Print, you are ultimately responsible for the security of any data transmitted via this software. If you connect your Variable Data Print system to the Internet, we cannot guarantee that the software will provide complete protection against network intrusion from the Internet. You are responsible for implementing your own network security.

Security Requirements

You must take the following security measures to use Variable Data Print:

- Install a firewall to prevent unauthorized users from gaining access to other computers on your network.

  For information about recommended firewalls, see the *Recommended Firewalls* technical bulletin on Kodak eCentral®, the Internet portal, at https://ecentral.creo.com/.

- Use strong passwords for all user accounts to prevent unauthorized access to your system.
- Apply critical Microsoft hotfixes. You can set your system to automatically search for critical security updates and install them.

The following security measures are optional:

- Install the Variable Data Print server in a DMZ network configuration, where the server is located in a network segment that has controlled access to the Internet.
- Install a Secure Sockets Layer (SSL) certificate on the Variable Data Print server. This encrypts any data transmitted between you and your customers and prevents unauthorized users from gaining access to this information.

About Firewalls

A firewall is a hardware or software system designed to prevent unauthorized access to or from a private network. Firewalls are frequently used to prevent unauthorized Internet users from accessing private networks that are connected to the Internet, especially intranets. All messages entering or leaving the intranet pass through the firewall, which examines each message and blocks those that do not meet the specified security criteria.

Only hardware firewalls are recommended for Variable Data Print security.

About Strong Passwords

User access to Variable Data Print is password-controlled. A user's password allows them to access the projects for the customer to which they belong.

We recommend the use of strong passwords with Variable Data Print to prevent unauthorized users from gaining access to your system. Strong passwords are passwords that are not easily guessed or broken.

To force the use of strong passwords in your system, in InSite Creative Administration, click **Configuration Settings > Security**, and select **Enforce Strong Passwords**. (For instructions on starting InSite Creative Administration, see *Starting InSite Creative Administration* on page 10.)

Guidelines for creating strong passwords:

- Passwords should contain a combination of different types of characters from at least three of the following types:

Description	Examples
Uppercase letters	A, B, C,...Z
Lowercase letters	a, b, c,...z
Numerals	0, 1, 2,...9
Non-alphanumeric special characters such as punctuation or symbols	{, }, #, $, %

- Passwords should be eight or more characters long.
- Passwords should not be obviously associated with the account owner. For example, a password should not contain any part of the user's e-mail name, user account name, given names, or any other names by which the user may be known.
- Passwords should not be "common" words. Avoid words from the dictionary or slang in common usage.
- Passwords should be complex, but relatively easy to remember.
- Passwords should be kept private. If a password is shared or discovered, change it immediately.
- Passwords should be changed regularly—for example, every 90 days.

About Microsoft Hotfixes

Microsoft Windows updates that are classified by Microsoft as "critical" should be installed on the Variable Data Print server as soon as is possible (for example, before the start of the next business day).

We recommend that you configure the server to automatically download and install Windows updates. If you do not want to enable automatic installation of updates, then you must assign an administrator to check the server regularly for updates and apply them.

To set up the server to automatic download updates:

1. From the **Start** menu, select **Settings > Control Panel.**
2. Double-click **Automatic Updates**.
3. Ensure that **Automatic (recommended)** is selected.
4. Set how often the server will check for updates. We recommend daily at 2:00 AM.
5. Click **OK**.

About DMZ Network Configuration

A Demilitarized Zone (DMZ) is a special network segment that has controlled access to the Internet and that may have controlled access to the corporate local area network (LAN). This segment is carefully exposed to the Internet (usually via ports 80 and 443), and computers in this segment do not have open access to computers on the LAN. Computers in the DMZ may have limited access to specific LAN computers via controlled DMZ openings.

To put Variable Data Print into a DMZ network configuration, contact your service representative. The representative will test that the correct network ports are open and that the network has adequate available bandwidth.

For more information about installing Variable Data Print in a DMZ network configuration, see the *DMZ Network Configuration Guide* on eCentral at https://ecentral.creo.com/.

About SSL Certificates

SSL, or Secure Sockets Layer, is a protocol developed by Netscape Communications Corp. for transmitting private documents via the Internet. Many Web sites use the protocol to protect confidential user information, such as credit card numbers.

SSL works by using a private key to encrypt data transferred over the SSL connection. By convention, URLs that require an SSL connection start with https instead of http.

Note: It is important that you and your customers use only Web browsers that Variable Data Print supports (see *Web Browser Compatibility* on page 3). Among other features, these browsers support SSL.

To add a Secure Sockets Layer to your system, you must purchase an SSL certificate from an authorized vendor (for example, Thawte, RSA Security or VeriSign) and install it on the Variable Data Print server. Contact a service representative for help with installing and configuring the SSL certificate.

For more information about SSL certificates, visit http://www.thawte.com/, http://www.rsasecurity.com/, or http://www.verisign.com/.

Frequently Asked Security Questions

This section contains the answers to some common questions about Variable Data Print security.

- **LAN Security:** Am I exposing all the computers on my LAN to the Internet?

  No, provided that you implement a firewall. If configured correctly, a firewall fully eliminates the risk of unnecessarily exposing computers on the LAN to the Internet. If you do not implement a firewall, you risk exposing your LAN to unauthorized users.

- **Server Security:** Can unauthorized users enter my system and bring it down?

  No, provided that you:

  - Implement strong passwords for all users. (See *About Strong Passwords* on page 5.)
  - Keep your server up to date with the latest critical Microsoft hotfixes. (See *About Microsoft Hotfixes* on page 5.)
  - Apply the latest Symantec® antivirus protection. (See *Installing Symantec Antivirus for Workflow Systems*, available on eCentral at https://ecentral.creo.com/.)

- **Content Security:** Can unauthorized users enter my system and get information?

  No, because Variable Data Print implements user authentication via passwords. In addition, you can further safeguard your system by placing Variable Data Print in a DMZ network configuration and installing an SSL certificate on the Variable Data Print server.

  When you install an SSL certificate and configure Internet Information Services (IIS) to allow only SSL connections, all data passed between the authorized user and your server is encrypted. This means that unauthorized users cannot gain access to this information.

2

Setting Up and Maintaining the System

Starting InSite Creative Administration....10
Viewing and Adding Licenses....10
Creating Customer Profiles....11
Monitoring System Activity....11
Generating Usage Reports....11
Restarting Variable Data Print....12

Starting InSite Creative Administration

Throughout this guide, there are procedures that require you to start and work within the InSite Creative Administration Web pages. There are several ways to access InSite Creative Administration, depending on whether you are working directly on the Variable Data Print server or accessing the server remotely.

If you are working directly on the server, you can use either of the following methods to start InSite Creative Administration:

- On the desktop, double-click the **TwEm Administrator** shortcut.
- From the **Start** menu, select **Programs > Kodak TwEm > TwEm Administrator**.

If you are accessing the server remotely, in Internet Explorer, go to `http://<VDP server name>:6377/TwAmWebAdmin/`, and log on using the server's username and password. (By default, this is `ARAXI/ARAXI`, although the username and password may vary for your particular server.)

Viewing and Adding Licenses

Variable Data Print uses licensing to:

- Control the software features that you can access
- Manage the number of users who can concurrently access the software

  If one of your users cannot log on, you may have already reached the maximum number of concurrent user logons allowed by your license.

Licensing is controlled by entering the Variable Data Print license key in License Manager. This license key controls the features you can access and the number of concurrent users. The license key is entered during the installation of the software. (In addition, you must have a valid dongle connected to your Variable Data Print server. This dongle is connected when the server is installed.)

You may want to view your Variable Data Print license key to see which licensed options you have, or you may need to enter a new license key if you purchased additional options after the initial installation of the software.

To open License Manager:

➢ From the **Start** menu, select **Programs** > **Kodak TwEm** > **License Manager**.

To view your licensed options:

➢ In License Manager, in the **TwAm** area, select **All License Keys**, and view the licensed options listed in the **Option** column.

To enter a new Variable Data Print license key:

➢ In License Manager, in the **TwAm** area, click **Enter License Key**. Enter the new license key, and click **Apply**. The new license key appears in the **Installed License Keys** list.

Creating Customer Profiles

Chapter 4, *Managing Users* describes in detail how to create various types of staff and customer users and give them access to specific customers, and specific projects, in your system.

Before you can give any users access to a customer's projects, you must create a customer profile for that customer.

1. In a Web browser, log on to Variable Data Print as a staff user with the right to create new customers:

   `http://<VDP server name>/`

   Tip: If you are on the Variable Data Print server, you can simply click the **TwEm Logon** shortcut on the desktop.

2. In the Customer view, click **Add Customer**.
3. Enter the customer's company information.

   If you want a particular staff user to receive e-mail messages about activity occurring in any projects for this customer, type the staff user's e-mail address in the **CSR Email** box.

4. Click **Create Account**.

   The customer name appears in the Customers view.

Monitoring System Activity

Using InSite Creative Administration, you can track who is currently logged on to your Variable Data Print system. You might want to do this, for example, when you need to restart the system and you want to know which users to notify.

1. Start InSite Creative Administration. (See *Starting InSite Creative Administration* on page 10.)
2. Click **Online Users**.

   The Online TwEm Users view lists the user name and company of each user currently logged on.

Generating Usage Reports

Using the Creative Workflow Configuration Application, you can generate reports on the total amount of data (in megabytes) uploaded by each of your customers during a specified time period. You can then use this information, for example, to charge your customers for their system usage based on their level of upload activity.

1. On the Variable Data Print server, from the **Start** menu, select **Programs > Kodak TwEm > Teamworks Config App**.
2. Click **Run Report**.
3. Specify the time period for which you want to view upload activity.

4. Click **Generate**.

   The report appears, indicating the amount of data that each customer uploaded to each of their projects during the specified time period.

Restarting Variable Data Print

You can stop and restart the Variable Data Print service whenever required. To stop and restart, you must be on the Variable Data Print server; you cannot do this remotely.

As well, you may want to send an e-mail message to your users before you stop the service, to notify them of the upcoming restart.

To send an e-mail message to your users:

1. Start InSite Creative Administration. (See *Starting InSite Creative Administration* on page 10.)
2. Click **Maintenance**.
3. Click **Email Users**.
4. Specify whether you want to send the message to all staff users, customer users, or both. (To view a list of all users currently logged on, see *Monitoring System Activity* on page 11.)
5. Type a subject line for the e-mail message and the message that you want to send, and click **Send**.

   The system automatically sends an e-mail message to all specified users, regardless of whether they are currently logged on.

To stop and restart the Variable Data Print service:

1. From the **Start** menu, select **Run**.
2. In the **Open** box, type `cmd`, and click **OK**.
3. To stop the service, type `net stop twam` and press ENTER.
4. To restart the service, type `net start twam` and press ENTER.

Note: You can also stop the service through InSite Creative Administration when you are on the Variable Data Print server. To do so, click **Maintenance > Shutdown > Shutdown Now**. However, you cannot restart the service through InSite Creative Administration; you can restart it only by typing `net start twam` in a command-prompt window.

3

Configuring the System

Overview....14
Editing Your Company Contact Information....14
Changing Session Timeouts....15
Specifying JPEG Download Options....15
Configuring Thumbnail Caching....15
Changing File Delete Times....16

Overview

The **Configuration Settings** section of InSite Creative Administration contains settings for the following aspects of your system:

- Company information
- Network security
- File storage and deletion
- Download options
- Thumbnail caching
- Event notification and reporting
- Software updates

This chapter describes some of the settings that you will likely want to configure after your system is installed. (For information about configuring event notification and reporting, see Chapter 5, *Setting Up Event Notification and Reporting*.)

For a complete description of each **Configuration Settings** option, see Appendix A, *Configuration Settings*.

To perform any of the procedures described next, first start InSite Creative Administration (see *Starting InSite Creative Administration* on page 10).

Editing Your Company Contact Information

The company name that your users see, the Web site URL that your users log on to, and the e-mail address that your users should contact if they need assistance or information is all configured during the Variable Data Print installation. However, you may want to change it later—for example, if your company name or e-mail address changes.

1. Click **Configuration Settings > Printer Information**.
2. Modify the **Printer Name**, **TwEm Administrator Email**, and **TwEm Home Page** boxes as desired.

   Note: You must also specify the administrator e-mail address to ensure that your system administrator receives any e-mail notifications about system activity, and to enable event notification. For more information about enabling event notification, see *Configuring the System to Send E-Mail Messages* on page 37.
3. Click **Update** to save and apply the changes.

Changing Session Timeouts

Session timeout is the number of minutes that a user's session can be idle before it is disconnected. A user's session is idle when the user is logged on to the system but is not doing anything. You can specify different session timeouts for customer users and staff users. The default setting in each case is 20 minutes. You might want to decrease the times, for example, to tighten your system security.

1. Click **Configuration Settings > Security**.
2. In the **Customer User Session Timeout** box, specify the number of minutes after which the idle session of a customer user will be disconnected.
3. In the **Staff User Session Timeout** box, specify the number of minutes after which the idle session of a staff user will be disconnected.
4. Click **Update** to save and apply the changes.

   Important: You must restart Variable Data Print for these changes to take effect.

Specifying JPEG Download Options

Users can download low-resolution JPEG versions of elements from projects. You can specify the various resolutions at which users can choose to download the JPEG files.

1. Click **Configuration Settings > Workflow**.
2. In the **Resolution for LowRes RGB JPEG Proofs** box, type the resolutions that you want to be available to users when downloading JPEG versions of elements. Separate multiple values by semicolons—for example, `72;150;300`.
3. Click **Update** to save and apply the changes.

Configuring Thumbnail Caching

You can configure the system to pregenerate and cache a thumbnail of an element when an element is first uploaded to a project.

This will speed up the display of the element. However, uploading the element will take longer, and more disk space is required on the Variable Data Print server. You may choose not to pregenerate thumbnails if upload speed is a concern or disk space is limited.

You control how element thumbnails are created and cached through the settings in InSite Creative Administration's **Configuration Settings > Rendering** section.

For a detailed description of each setting, see *Rendering* on page 64.

Changing File Delete Times

When a user deletes an element from a project, or deletes a whole project, it automatically disappears from the user's view. However, the files remain on the server until a predetermined purge time. This has two advantages:

- You can schedule file purging for a day and time when few people will be using the system, so that the file purge process does not affect system performance. This is especially useful if a customer deleted several projects at one time.
- If a user accidentally deletes an element or project, there is some time before the files are actually purged from disk and the files can be recovered.

File delete times are configured during the Variable Data Print installation, but you may want to change the settings later.

Note: If files are accidentally deleted and you want to retrieve them before they are purged from disk, contact your service representative for assistance.

To change the file delete times:

1. Click **Configuration Settings > System and Networking**.
2. In the **Delayed Delete Delay in Days** box, type the number of days after which deleted files will be purged from disk. For example, if you type `3`, deleted files will be purged from disk after three days. If you type `0`, deleted files will be purged daily.
3. In the **Delayed Delete Start Times** box, type the time of day (on the 24-hour clock) at which you want the file purge to begin. For example, type `04:00` to start the purge at 4:00 AM.

   You can specify multiple times, separated by semicolons, if desired. For example, type `04:00;22:00` to purge files at 4:00 AM and again at 10:00 PM on each day that file purging is performed.
4. In the **Delayed Delete Duration in Minutes** box, type the amount of time that you want the system to spend purging files. For example, type `30` for the system to spend 30 minutes purging files at each purge time specified in the **Delayed Delete Start Times** box.

   After the purge duration has passed, purge activity stops, regardless of whether all deleted files were purged from the system. You might want to set the purge duration to a short time if you are concerned that the purge process will impact system performance for your users.

   You can specify multiple durations, separated by semicolons, if desired. Each duration that you specify corresponds to a purge time that you typed in the **Delayed Delete Start Times** box. For example, if you entered two delete start times in the **Delayed Delete Start Times** box, you should enter two durations in the **Delayed Delete Duration in Minutes** box.

Example:

Delayed Delete Delay in Days: 0

Delayed Delete Start Times: 04:00;22:00

Delayed Delete Duration in Minutes: 30;30

In this example, files are purged from disk daily at 4:00 AM for a duration of 30 minutes, and again at 10:00 PM for a duration of 30 minutes.

Example:

Delayed Delete Delay in Days: 3

Delayed Delete Start Times: 04:00;22:00

Delayed Delete Duration in Minutes: 30;10

In this example, files are purged from disk after three days. At 4:00 AM every three days, files are purged for a duration of 30 minutes. At 10:00 PM every three days, files are purged for a duration of 10 minutes.

5. Click **Update** to save and apply the changes.

4 Managing Users

About Roles....20
Creating Roles....21
About User Rights....23
Default Roles....25
Assigning Roles to Typical Staff Users....26
Assigning Roles to Typical Customer Users....29
Typical Users In a Sample System....32
Tell Me More About Assigning Roles....33

About Roles

A *user right* is a single setting that determines your ability to take a specific action. For example, individual user rights control users' ability to create VDP templates, personalize VDP templates, upload elements, and download elements in a project.

role: a collection of user rights

In Variable Data Print, you group different user rights together to create different *roles*, with each role providing a different set of abilities to whoever is assigned the role. What you can do in the system—the projects that you can see and the actions you can perform—depends on the roles that you are assigned.

There are two types of roles—system/customer and project:

- System/customer roles determine your ability to create and delete customers, edit customer contact information, and create customer user accounts and assign roles to users. (When you assign this type of role at the site level, it is called a *system role*. When you assign this type of role at the customer level, it is called a *customer role*.)
- Project roles determine your ability to create and delete projects, manage other users' access to projects, work with elements in projects, and create and personalize variable data print (VDP) templates.

There are also three levels (or access points) at which these roles can be assigned to users: site level, customer level, and project level:

- When a role is assigned to a user at the *site level*, the user can take action as permitted by the rights included in that role on any customer in the system.
- When a role is assigned to a user at the *customer level*, the user can take action as permitted by the rights included in that role only on the customer for which the role was assigned.
- When a role is assigned to a user at the *project level*, the user can take action as permitted by the rights included in that role only within the specific project for which the role was assigned.

For example, suppose that you create a project role that includes the Upload project right. If you assign the role to a user at the site level, that user can upload elements to any project for any customer in the system. If you assign the role to the user at the customer level (that is, for a particular customer only), the user can upload elements to any project, but *only for that particular customer*. If you assign the role to the user at the project level only (that is, for a particular project only), the user can upload elements *only to that particular project*.

Tip: You can also override the role assigned at a higher level with a role assigned at a lower level. For details, see *Tell Me More About Assigning Roles* on page 33.

However, not all types of roles can be assigned at all levels, and in some cases the levels at which a role can be assigned depend on whether the user to which you want to assign the role is a staff user (a customer service representative or other member of your staff who works with specific customers) or a customer user (a member of your customer's organization who needs access to one or more projects created specifically for that customer).

Only staff users can be assigned roles at the site level. Either staff users or customer users can be assigned roles at the customer and project levels.

Table 2 lists each type of role and the levels (or access points) at which each role can be assigned to a user, depending on whether the user is a staff user or customer user.

Table 2: Roles and possible access points

This Type of Role	Can Be Assigned at Site Level To	Can Be Assigned at Customer Level To	Can Be Assigned at Project Level To
System/customer	Staff users	Staff users or customer users	Cannot be assigned
Project	Staff users	Staff users or customer users	Staff users or customer users

You create all system/customer and project roles in InSite Creative Administration. (See *Creating Roles* on page 21.) You also use InSite Creative Administration to create staff users and assign roles to staff users at the site level.

You use Variable Data Print to assign roles to staff users at the customer and project levels (see *Assigning Roles to Typical Staff Users* on page 26), and to create customer users and assign roles to customer users (see *Assigning Roles to Typical Customer Users* on page 29).

Creating Roles

When Variable Data Print is installed, several roles are automatically created by default. (For a description of each of these roles, see *Default Roles* on page 25.) If you are satisfied with these default roles, you can simply begin assigning them to users as described in *Assigning Roles to Typical Staff Users* on page 26. If you need to create additional roles to meet your needs, perform the following steps below to create each role. You create all system/customer and project roles in InSite Creative Administration.

To create a role:

1. In InSite Creative Administration, click **Role Manager**.
2. Click **System/Customer** or **Project** depending on the type of role you want to create.

   A table lists all of the rights that can be selected for the current type of role, and any existing roles.
3. Click **Edit**, and click **Add** at the bottom of the screen.

   A new row appears at the bottom of the table.
4. Type a name for the role and click in the cells for each right that you want to include in the role. A check mark indicates that the right is included in the role. (For a description of what each right enables a user to do, see *About User Rights* on page 23.)
5. Click **Update**.
6. Repeat steps 3 to 5 for each role of the current type that you want to create.

7. When you finish creating all desired roles of the current type, click **Done**.

Repeat the procedure for each type of role you want to create.

After you create all of the roles that your staff and customer users need, you can assign roles. For details, see *Assigning Roles to Typical Staff Users* on page 26 and *Assigning Roles to Typical Customer Users* on page 29.

To delete a role:

1. In InSite Creative Administration, click **Role Manager**.
2. Click **System/Customer** or **Project**, depending on the type of role you want to delete.
3. Click **Edit**, and click **Delete** next to the role you want to delete.
4. Click **Update**.
5. When prompted to confirm that you want to delete the role, click **OK**.

   The role disappears.
6. Click **Done**.

To change the name of a role:

1. In InSite Creative Administration, click **Role Manager**.
2. Click **System/Customer** or **Project**, depending on the type of role you want to change.
3. Click **Edit**, and click the name of the role that you want to change. Type a new name for the role.

   The name of the role turns red to indicate that the name has been changed.
4. Click **Update**.
5. Click **Done**.

About User Rights

Individual project user rights act the same regardless of the access point at which they are assigned. For example, a user assigned a project role at the customer level that includes the Upload right can upload elements to any of that customer's projects. A user assigned the same project role at the project level only can also upload elements, but only to the project for which the user is explicitly given access.

Table 3 describes each system/customer and project user right that can be selected when creating a role in InSite Creative Administration, and what each right enables a user to do when a role in which the right is included is assigned to the user at the site, customer, or project level.

Table 3: System/customer and project rights

Right	Site Level	Customer Level	Project/Library Level
System/Customer Rights			
Manage Access	Create customer user accounts for any customer, and assign roles to staff and customer users at the customer level for any customer	Create user accounts for the customer at which the role is assigned, and assign roles to users at the customer level for that customer	N/A (System/customer roles cannot be assigned at the project level.)
Create Customer	Create new customers	This right has no effect when a customer role is assigned to a user at the customer level. This right is not visible at the customer level.	N/A (System/customer roles cannot be assigned at the project level.)
Modify Customer	Edit any customer's company information (company name and contact information)	Edit the company information (company name and contact information) for the customer for which the role is assigned.	N/A (System/customer roles cannot be assigned at the project level.)
Delete Customer	Delete customers	This right has no effect when a customer role is assigned to a user at the customer level. This right is not visible at the customer level.	N/A (System/customer roles cannot be assigned at the project level.)

Right	Site Level	Customer Level	Project/Library Level
Project Rights			
Manage Access	Create customer user accounts within any project to which the user has access, and assign project roles at the project level Note that the Manage Access right enables the **Manage Access** button in the Project Administration view for a project. However, the user can access the Project Administration view only if they also have the Modify Project right.		
Create Project	Create new projects for any customer	Create new projects for the customer for whom the user has been assigned a project role	N/A (You cannot create new projects for any customer if you are assigned a project role only for a specific project.)
Modify Project	Access a project's Project Administration view Depending on the user's rights, from the Project Administration view, they can manage access for the project and generate event reports. To see the **Manage Access** button, the user must have the Manage Access right in addition to the Modify Project right.		
Delete Project	Delete projects for any customer	Delete projects for the customer for whom the user has been assigned a project role	N/A (You cannot delete projects for any customer if you are assigned a project role only for a specific project.)
View Elements Tab	See the Elements view of a project		
Upload	Upload elements to a project The View Elements Tab right must be selected for this right to be available.		
Arrange/Modify	Move, copy, and rename elements and folders, and create folders in a project The View Elements Tab right must be selected for this right to be available.		
Download Originals	Download high-resolution original versions of elements from a project The View Elements Tab right must be selected for this right to be available.		
Download JPEG	Download low-resolution JPEG versions of elements from a project The View Elements Tab right must be selected for this right to be available.		
Delete	Delete elements and folders from a project The View Elements Tab right must be selected for this right to be available.		

Right	Site Level	Customer Level	Project/Library Level
Personalize VDP Templates	Create personalized print items based on available variable data print (VDP) templates The View Elements Tab right must be selected for this right to be available.		
Manage VDP Templates	Create variable data print (VDP) templates and make them available for other users to create personalized print items The View Elements Tab right must be selected for this right to be available.		

Default Roles

When Variable Data Print is installed, several roles are automatically created by default. (You can create additional roles as needed, as described in *Creating Roles* on page 21.) Tables 4 and 5 list the default system/customer and project roles that are created and the rights that are automatically selected for each role.

Table 4: Default system/customer roles

	Manage Access	Create Customer	Modify Customer	Delete Customer
Access Manager	✓			
Administrator	✓	✓	✓	✓

Table 5: Default project roles

	Manage Access	Create Project	Modify Project	Delete Project	View Elements Tab	Upload	Arrange / Modify	Download Originals	Download JPEG	Delete	Personalize VDP Templates	Manage VDP Templates
Access Manager	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Content Manager		✓	✓	✓	✓	✓	✓	✓	✓	✓		
Content Reader					✓			✓	✓			

Assigning Roles to Typical Staff Users

Depending on the different types of actions that your staff users must perform in your system, and the rights that you want to give each of your staff users, you may need to create many roles.

This section describes a few typical staff users that you will likely have in your system, and how to create and assign roles to those users. This should give you a general understanding of creating and assigning roles, in the event that you need to create additional types of staff users for your system.

Table 6 summarizes each typical staff user and what you would expect them to be able to do in the system. Detailed instructions for creating each user and assigning appropriate roles to that user are provided after the table.

Table 6: Types of staff users

User	Must Be Created By	Can	To Create, See
Full-access staff user (a staff user that can see all customers in the system)	Site administrator	▪ See all customers and all projects for each customer ▪ Edit any customer's contact information ▪ At any level (customer or project), create customer user accounts for any customer and assign roles to staff and customer users	*Full-Access Staff User* on page 27
Limited-access staff user (a staff user that can see specific customers only)	Site administrator	▪ See only the customers for which they are given access, but all projects for those customers ▪ Edit the contact information for any customer they can see ▪ At any level (customer or project), create customer user accounts for any customer they can see, and assign roles to staff and customer users	*Limited-Access Staff User* on page 27
Multi-customer user (a customer user with access to more than one customer)	Site administrator or staff user (or another multi-customer user with the Manage Access customer user right assigned at the customer level for each customer to which they have access)	See multiple customers when they log on, and see all of the projects for each of those customers	*Multi-Customer User* on page 28

Creating a Staff User Account

To create a full-access or limited-access staff user, you must first create a new staff user account using InSite Creative Administration.

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 10).
2. Click **Staff Users**.
3. Click **Add New User**.
4. When a dialog box appears, warning you that you are creating an account with access to all projects and libraries, click **OK**.
5. Type the username and password that the user will use to log on to the system.

   For information about creating strong passwords, see *About Strong Passwords* on page 5.
6. In the **User First Name** and **User Last Name** boxes, type the name of the user as it will appear in the interface when the user logs on to the system.
7. Fill in the user's other contact information as desired.

   The e-mail address that you specify in the **Email** box is the e-mail address through which the user will receive any event notifications and reports. For more information about event notification, see Chapter 5, *Setting Up Event Notification and Reporting*.
8. The roles that you assign to the user in the **User Rights** area depend on the type of staff user you are creating, as described further in the sections that follow.
9. Click **Add User**.

   The new account appears in the **Staff Users** list.

Full-Access Staff User

1. In InSite Creative Administration, create a new staff user account. (See *Creating a Staff User Account* on page 27.)
2. In the **User Rights** area, select the Administrator system role and Administrator project role. These are default roles that have all rights selected for each role (see *Default Roles* on page 25).

Limited-Access Staff User

1. In InSite Creative Administration, create a new staff user account (see *Creating a Staff User Account* on page 27) but *do not* assign the user any roles at this point. (Leave all roles at the site level as **No Access**.)
2. Log on to Variable Data Print as the site administrator or as another staff user with the Manage Access system user right assigned at the site level.
3. Consider all of the customers to which you want to give this user access. In the Customers view, under the first customer to which you want to give the user access, click **Edit Customer Info**, and click **Manage Access**. (For instructions on creating new customers, see *Creating Customer Profiles* on page 11.)

4. Select the **Show Site Users** check box. All of the customer's users *and* all staff users with accounts in your system should now appear in the list of users.
5. Find the staff user you created in step 1 and assign the user Administrator customer and project roles. These are default roles that have all rights selected for each role (see *Default Roles* on page 25).
6. Click **Update**.
7. Return to the Customers view and repeat steps 3 to 6 for each customer to which you want to give the staff user access.

Note: When a customer user for a customer to which the limited-access staff user is assigned manages access at the customer or project level, they will see the staff user in the list of users and can modify the roles assigned to the staff user for that customer.

Multi-Customer User

Note: Although a multi-customer user (MCU) is not strictly a staff user (for example, an MCU could be a freelance photographer who does work for several customers), instructions for creating an MCU have been included here because the site administrator or other staff user with access to multiple customers typically creates MCUs.

1. Log on to Variable Data Print as the site administrator or as another staff user with the Manage Access system user right assigned at the site level. (Note that an existing MCU can also create another MCU, as long as the existing MCU has the Manage Access customer user right assigned at the customer level for each customer to which they want to give the new MCU access.)
2. Consider all of the customers to which you want to give this user access. In the Customers view, under the first customer to which you want to give the user access, click **Edit Customer Info**, and then click **Manage Access**. (For instructions on creating new customers, see *Creating Customer Profiles* on page 11.)
3. Click **Add New User**.
4. Specify the user's logon user name, password, display name, and other contact information, and click **Add User**.
5. In the Managing User Access at Customer view, assign a customer and project role to the user as desired. You may opt not to assign a customer role to the user, to prevent them from being able to manage access for the customer at the customer level. Assign a project role that contains the rights you want the user to have for all projects that they can access for this customer.
6. Click **Update**.
7. Return to the Customers view, and click **Edit Customer Info > Manage Access** for the second customer to which you want to give the user access. All of the existing users with access to this customer are listed.
8. Click **Find Users**, and select the customer for which you created the user in steps 2 to 6. Click **OK**.
9. Scroll to the bottom of the Managing User Access view. You should now see the subheading **Users From <selected_customer>**, and under it, a list of all customer users for that customer.

10. Find the user that you created in steps 2 to 6 and assign the user a customer and project role as desired.

    You can assign different roles to the user for each customer.

11. Click **Update**.

    The user appears in the list of users for the current customer.

12. Repeat steps 7 to 11 for each customer to which you want to give the user access.

Tip: This procedure gives the user access to all projects for each specified customer. However, you can also give the user access to only specific projects for a given customer. To do so, follow the procedure above, but do not assign a project role to the user at the customer level. Then, in each specific project to which you want to give the user access, click **Administration > Manage Access**, and assign the user a project role.

Assigning Roles to Typical Customer Users

A staff user typically creates a customer and then creates one customer user account with full administration rights for that customer (a customer administrator). This customer administrator can then create additional user accounts with varying user rights for their other employees as required.

Depending on the different types of actions that your customer users need to be able to perform in your system, you may need to create many roles. When a customer administrator creates a user account for an employee, the roles that the administrator can assign the user are limited to the roles you have created in InSite Creative Administration.

Table 7 summarizes the customer administrator role as well as a few typical customer users that a customer administrator would likely want to create for their company.

Because a staff user must create a customer administrator, this document provides instructions for creating a customer administrator and assigning appropriate roles to that user. Instructions for creating the other types of customer users described in Table 6 are not included in this document; they can be found in the Variable Data Print Help.

Table 7: Types of customer users

User	Must Be Created By	Can	To Create, See
Customer administrator	Site administrator or staff user	• See all projects for their company • Edit their company's contact information • At the customer or project level, create customer user accounts for their company employees and assign roles to those users	*Customer Administrator* on page 31

User	Must Be Created By	Can	To Create, See
Full-access customer user	Customer administrator	▪ See all projects for their company ▪ Manage access at the project level for specific projects, and create other customer users at the project level, *if* their project role includes the Manage Access user right (Typically this type of user is not assigned a customer role so cannot manage access at the customer level.)	Variable Data Print Help
Limited-access customer user that can see only the projects they create themselves	Customer administrator	▪ See only the projects they create ▪ Manage access for the projects they create, and create other customer users at the project level, *if* their project role includes the Manage Access user right	Variable Data Print Help
Limited-access customer user that can see only specific projects	Customer administrator or another customer user with the right to manage access for a specific project	▪ See only the projects to which they have been given access ▪ Manage access for the projects they can see, and create other customer users for those projects, *if* their project role includes the Manage Access user right	Variable Data Print Help

Customer Administrator

1. Log on to Variable Data Print with a staff user account that has the Create Customer and Manage Access system user rights assigned at the site level.
2. Under the name of the customer for whom you want to create the user, click **Edit Customer Info**, and click **Manage Access**. (For instructions on creating new customers, see *Creating Customer Profiles* on page 11.)
3. Click **Add New User**.
4. Specify the user's logon user name, password, display name, and other contact information, and click **Add User**.
5. In the Managing User Access at Customer view, assign to the user the Administrator customer and project roles. (These are default roles that have all rights selected for each role, as described in *Default Roles* on page 25.) Under the project role, ensure that **Access All** is selected.

   Note: When you assign the Administrator customer role to a user at the customer level, the Manage Access and Modify Customer rights are applicable. However, the Create Customer and Delete Customer rights have no effect; they apply only when the role is assigned to a user at the site level.
6. Click **Update**.

Typical Users In a Sample System

Table 8 lists the typical types of users as described in *Assigning Roles to Typical Staff Users* on page 26 and *Assigning Roles to Typical Customer Users* on page 29, and illustrates which projects each type of user would be able to access in a typical system. In this example, the system includes three customers, each with three projects.

Table 8: Staff and customer users in a sample system

User	Customer A Projects			Customer B Projects			Customer C Projects		
	1	2	3	1	2	3	1	2	3
Site administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓
Limited-access staff user with access to Customers A and B	✓	✓	✓	✓	✓	✓			
Multi-customer user with access to Customers A and C	✓	✓	✓				✓	✓	✓
Customer administrator for Customer A	✓	✓	✓						
Full-access customer user for Customer A*	✓	✓	✓						
Limited-access customer user for Customer B (can see only the projects they create)				✓		✓			
Limited-access customer user for Customer C (can see only specific projects)								✓	

* The difference between the customer administrator for Customer A and the full-access customer user for Customer A is that the administrator can manage access for their company at the customer level, while the full-access customer user cannot (although they may have the right to manage access at the project level for specific projects).

Tell Me More About Assigning Roles

You can assign different roles to a user at the customer level for each customer they can see.

For example, when assigning roles to a multi-customer user with access to both Customers A and C, you might assign the user only the Content Reader project role for Customer A, but the Content Manager project role for Customer C. (For information about the rights included in these default project roles, see *Default Roles* on page 25.)

Likewise, you can assign different roles to a user for each project they can access.

Overriding Roles

You can override the role assigned at a higher level with a role assigned at a lower level.

For example, you might give a customer user only the Content Reader project role at the customer level, but then override this by giving the user the Content Manager role at the project level for a specific project. This enables you to provide a user with more restricted access to the customer's projects in general, but then provide the user with greater access to a specific project with which they are more directly involved.

You can do the same for staff users, for example, by assigning a staff user a more limited role at the site level but then assigning the user a role with more rights at the customer level for a specific customer. This would enable the staff user to see all customers in the system, but be able to take certain privileged actions only on specific customers.

Inheriting Roles

When you manage access for a user at one level when a role of the same type is already assigned to the user at a higher level, the role is shown as assigned at the lower level by 'Default'.

For example, suppose that you assign the Content Reader project role to a customer user at the customer level. When you manage access for a specific project for that customer, the project role assigned to the user at the project level will appear as **Content Reader - Default**, because a project role is already assigned to the user at a higher level. You can then change the role that is assigned to the user for that particular project, if desired.

Limitations on Assigning Roles

There are two limitations when assigning roles to users:

- If a user is assigned a role at a higher level, you can never completely remove their access at a lower level, although you can assign a role with lesser rights at the lower level.

  For example, if a user is assigned the Administrator project role at the customer level, you can override this at the project level by assigning them only the Content Reader role for a specific project. You cannot select **No Access** for the project, however, because the project role assigned to the user at the customer level guarantees that the user must have at least minimal access to all of the customer's projects.

- The rights that you can assign to other users are limited to the rights that *you* have been assigned. When assigning a role to another user, only roles that contain a subset of the rights you have been assigned at the same access point are made visible to you for selection.

5

Setting Up Event Notification and Reporting

About Event Notification 36
Configuring the System to Send E-Mail Messages 37
Configuring Notification Delivery Times 38
Configuring the Notification Settings for a Role 38
Viewing and Overriding Notification Settings 38
Event Type Descriptions 39
About Event Reporting 40
Generating an Event Report 41
Customizing E-Mail Messages 42

About Event Notification

User actions—also known as events—are tracked in a history database, and you can configure the system to notify users whenever events of certain types occur. Notifications are useful because users can stay informed about what is happening in a particular project without having to log on to the system. Examples of tracked events include projects being created, elements being uploaded, and VDP templates being created.

The events that a user receives notification about are determined by the notification settings associated with the roles assigned to them. When you create a project role in InSite Creative Administration, you can select the event types that you want to associate with the role from a list of available event types. When you assign the role to a user, the user automatically receives notification whenever an event occurs that is of a type associated with the role assigned to them. For example, if you create a project role and select the Element Changed event type for that role, any user assigned the role will receive notification whenever an element is renamed or moved in a project to which they have access. (For a description of each available event type, see *Event Type Descriptions* on page 39.)

The event types that you can select for a role depend on the user rights selected for the role.

Only project roles have notification settings; customer roles do not.

By default, you determine the notification settings associated with each role, but a user can override their own notification settings for each role assigned to them.

To receive the event notifications associated with a role assigned to them, a user's e-mail address must be specified in their user account.

Notification Formats

When you configure the event notification settings for a role, you specify for each event type whether notifications about events of that type will be sent as individual e-mail messages as events occur, or in digest format once a day.

With individual e-mail messages, notifications are sent as events occur throughout the day. However, it still is possible for a single message to contain multiple event notifications. Depending on the e-mail notification timeout setting in InSite Creative Administration the system will wait 1 minute or longer between sending notifications. So, for example, if timeout is set to 1 minute, any events of the same type that occurred within the last minute are grouped together into a single e-mail message. If the timeout is set to 30 minutes, any events of the same type that occurred within the last 30 minutes are grouped together. For instructions on configuring the notification timeout, see *Configuring Notification Delivery Times* on page 38.

The digest format is also an e-mail message, but summarizes all of the events of a given type for the past 24 hours. Separate digest e-mail messages are sent to a user for each project that the user can access and for which they have notification settings enabled. The exact time of day that digests are sent to users is configurable in InSite Creative Administration. For instructions, see *Configuring Notification Delivery Times* on page 38.

Each notification message contains a link to the relevant project in a Web browser.

A user can override the delivery format for the notifications associated with the roles assigned to them.

Configuring the System to Send E-Mail Messages

Before you set up event notification, ensure that the system is configured to send e-mail messages to users.

1. Ensure that the Variable Data Print server's SMTP e-mail server is set up:
   a. On the Variable Data Print server, from the **Start** menu, select **Programs > Administrative Tools > Internet Services Manager**.
   b. In the Internet Information Services window, on the **Tree** tab, expand the name of the server.
   c. Right-click **Default SMTP Virtual Server**, and select **Properties**.
   d. On the **Delivery** tab, click **Advanced**.
   e. In the Advanced Delivery dialog box, in the **Smart host** box, ensure that the SMTP e-mail server's IP address is specified. The IP address must be contained in square brackets—for example, `[10.1.2.200]`.
   f. Close the dialog box and the Internet Information Services window.
2. Start InSite Creative Administration (See *Starting InSite Creative Administration* on page 10).
3. Click **Configuration Settings > Printer Information**.
4. In the **TwEm Administrator Email** box, type your system administrator e-mail address.

   It is essential that you specify this e-mail address to ensure that your system administrator receives any e-mail notifications about system activity.
5. In the **TwEm Home Page** box, ensure that the Web site URL that your users log on to is specified.

   The URL must be specified in order for Web browser links to be included in event notification e-mail messages, and to enable the generation of event reports.
6. Click **Update** to save and apply the changes.
7. Click **Notification**.
8. To enable event notification for all customer users, select **Send Customer Email Notification**.

   Note: Even when **Send Customer Email Notification** is enabled, only users whose e-mail addresses are specified in their user accounts will actually receive event notifications.
9. Click **Update** to save and apply the changes.

Configuring Notification Delivery Times

As described in *Notification Formats* on page 36, notification messages can be sent as individual e-mail messages as events occur, and as summary digests sent once a day. You must configure the frequency at which individual e-mail messages are sent by the system, and the time of day at which digests are delivered.

1. In InSite Creative Administration, click **Configuration Settings > Notification**.
2. In the **Email Notification Timeout** box, type the number of minutes that the server will wait before sending individual notification messages to users.

   The default time is 30 minutes, but you might want to specify a shorter time so that users receive notifications more quickly and so that notification messages do not include multiple events.
3. In the **Email Digest Wakeup Time** box, type the time of day (in 24-hour clock format) at which you want all digests to be sent. The default time is 01:00 (1:00 AM).

   You may want to specify a time at which your system typically experiences low activity.
4. Click **Update**.

Configuring the Notification Settings for a Role

1. In InSite Creative Administration, click **Role Manager**, and click **Project**.
2. Click **Notifications** next to the role whose notification settings you want to configure.
3. In the User Notification Settings view, for each event type that you want to associate with the role, select the desired **Email** or **Digest** check box.

   Email indicates that notifications about that event type will be sent as individual e-mail messages as the events occur. **Digest** indicates that notifications will be sent in digest format delivered once a day. (For more information, see *Notification Formats* on page 36.)
4. Click **Update**.

Viewing and Overriding Notification Settings

When you view a staff user's account in InSite Creative Administration, you can see the project role assigned to the user at the site level, but you cannot view or override the notification settings associated with that role. You can view and override the notification settings for a role assigned to a particular user (either a staff user or a customer user) at any level through Variable Data Print only.

For instructions on viewing and overriding notification settings, see the Variable Data Print Help.

Event Type Descriptions

Table 9 describes each event type that you can select when you configure the notification settings for a project role.

The event types that are visible for a role depend on the user rights selected for the role.

Table 9: Project event types

Event Type	Description
Element/Revision Created	An element or revision of an element was created in a project as a result of an upload or copy.
Element/Revision Deleted	An element or revision of an element was deleted from a project.
Element Changed	An element in a project was renamed or moved.
Folder Events	A folder was created, renamed, moved, or deleted.
Elements Uploaded	An upload to a project was initiated. An Elements Uploaded event indicates only that an upload was initiated. When the upload is finished and the uploaded element appears in the project, an Element/Revision Created event is recorded. Therefore, the successful upload of an element will result in two event notifications. Uploading a folder containing one or more elements generates at least three event notifications—an Elements Uploaded event, a Folder Events event (for the creation of the uploaded folder in the destination project), and an Element/Revision Created event for each element contained in the uploaded folder.
Elements Downloaded	A download from a project was initiated.

Event Type	Description
Elements/Folders Copied	A copy of an element or folder in a project was initiated. An Elements/Folders Copied event indicates only that a copy was initiated. When the element is successfully copied and appears in the destination location, an Element/Revision Created event is also recorded. Therefore, the successful copy of an element will result in two event notifications. Copying a folder to a new location generates two event notifications—an Elements/Folders Copied event, and a Folder Events event (for the creation of the copied folder in the destination location). If the copied folder contains one or more elements, an Element/Revision Created event is also generated for each element in the folder.
Container Events	A project was created or deleted.
Template Created	A VDP template was created.
Template Deleted	A VDP template was deleted.
Template Enabled	A VDP template was made available in a project for users to personalize.
Personalized Result Created	A user personalized a VDP template and saved the print item to their personal Results view.

About Event Reporting

In addition to receiving event notifications as events occur, users can generate event reports. An event report summarizes the activity for one or more selected types of events, during a specified time period, within one or more selected projects. While event notifications summarize events as they occur or over a 24-hour period, an event report can summarize activities that occurred as long as three months ago.

Staff users can generate event reports in InSite Creative Administration. A staff user can include specific activities that occurred in one or more selected projects for a single customer only, or specific activities in all projects for all customers. For instructions, see *Generating an Event Report* on page 41.

Customer users can also generate reports for their own projects through Variable Data Print. For instructions, see the Variable Data Print Help.

Reports are generated as comma-separated value (.csv) files that can be saved and opened in Microsoft Excel® or other spreadsheet software.

Generating an Event Report

1. In InSite Creative Administration, click **Reports**.
2. In the **Date Range** list, select the time period for which activity will be reported.
3. In the **Customer** list, select a specific customer to view project activity that customer only, or select **All** to view project activity for all of the customers in your system.
4. If you selected **All** in the **Customer** list, the **Container** list becomes unavailable. In this case, go to step 5.

   If you selected a specific customer in the **Customer** list, in the **Container** list, select a specific project whose activity you want to view. Alternatively, you can select **All** to run the report on all of the customer's projects.
5. In the **Event Type** area, select the types of events that you want to include in the report. Clear the types of events that you do not want to include. Table 10 describes the types of activities that are included in the report when you select a given event type.

   Table 10: Report event types

Report Event Type	Activities Included
Customers, Projects, Libraries	Projects created or deleted
Folders, Elements, Revisions	▪ Elements or revisions of elements created as a result of an upload or copy ▪ Elements or revisions of elements deleted ▪ Elements renamed or moved ▪ Folders created, renamed, moved, or deleted
Uploads	Uploads initiated
Downloads	Downloads initiated
Copies	Copies of elements or folders initiated
Templates	▪ VDP templates created ▪ VDP templates deleted ▪ VDP templates made available in a project for users to personalize ▪ VDP templates personalized by users and saved as print items to the users' personal Results views

6. Click **Generate Report**.

   When the report is ready to view, the **Generate Report** button changes to a **View Report** button.
7. Click **View Report**.

8. When prompted to open or save the file, click **Open** or **Save** as desired.

   If you choose to open the file, the file opens in a Web browser window, but you cannot save it.

   If you choose to save the file, the file is saved to the specified location as a comma-separated value (.csv) file that you can then open in Excel or other spreadsheet software.

Customizing E-Mail Messages

The system generates two types of e-mail messages—system messages and event notification messages.

System messages are sent when, for example, a new user is welcomed to the system, a user's account is changed, or a user forgets their logon password.

Event notification messages are sent when project-specific events occur.

You can customize the text that appears in either type of message.

System Messages

The **.xsl** stylesheets that control the content of system messages that are sent to your system's *customer users* are stored on the Variable Data Print server in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en.** Table 11 lists the stylesheets in this folder that apply to Variable Data Print.

Table 11: System message stylesheets for customer users

Stylesheets	Purpose
CreatedUser_Body.xsl	Message sent to a user when a new account is created for them The message includes the user's logon user name and password, and a link to your system's logon page.
CreatedUser_Subject.xsl	Subject line included in the message based on CreatedUser_Body.xsl
ForgotPassword_Body.xsl	Message sent to a user when they click **Forgot Your Password?** on your system's logon page The message includes the user's logon user name and password.
ForgotPassword_Subject.xsl	Subject line included in the message based on ForgotPassword_Body.xsl

Stylesheets	Purpose
ModifiedUser_Body.xsl	Message sent to a user when their account is modified The message includes an explanation of the changes made to the user's account.
ModifiedUser_Subject.xsl	Subject line included in the message based on ModifiedUser_Body.xsl

The **.xsl** stylesheets that control the content of system messages that are sent to your system's *staff users* are stored on the Variable Data Print server in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en\CSR.** Table 12 lists the stylesheets in this folder that apply to Variable Data Print.

Table 12: System message stylesheets for staff users

Stylesheet	Purpose
ForgotPassword_Body.xsl	Message sent to a user when they click **Forgot Your Password?** on your system's logon page The message includes the user's logon user name and password.
ForgotPassword_Subject.xsl	Subject line included in the message based on ForgotPassword_Subject.xsl
SentTroubleshootingResults_Body.xsl	Message sent to your system administrator when a user clicks **Email Results** in the System Diagnostics dialog box from within a project The system administrator e-mail address to which the message is sent is specified in InSite Creative Administration, under **Configuration Settings > Printer Information > TwEm Administrator Email** (see *Editing Your Company Contact Information* on page 14).
SentTroubleshootingResults_Subject.xsl	Subject line included in the message based on SentTroubleshootingResults_Body.xsl

To modify a system message stylesheet:

1. In an xml editor, open the stylesheet that you want to modify.

   Modify the text of the message as desired.
2. Save your changes and close the file.

Event Notification Messages

The .properties file that controls the content of all event notification e-mail messages is stored on the Variable Data Print server in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\rto\Creo\en**.

By default, each event notification message includes a subject, salutation, event message, links to open a Web browser, and a closing goodbye statement. You can customize the text that appears in each part of the message. You cannot add company logos or contact information, or change the formatting of the e-mail messages (each event must be reported as a single-line item in the message).

To modify event notification messages:

1. On the Variable Data Print server, open the folder **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\rto\Creo\en**.
2. In a text editor, open **historyeventmsgs.properties**.

   The majority of the entries define the way in which different event messages will be written. Near the bottom of the file, the following entries define the way in which the the e-mail subject, salutation, and closing statement will be written:

   - **mkMsg_TWHEventEmailSalutation**: salutation
   - **mkMsg_TWHEventBroughtToYouByMessage**: closing statment
   - **mkMsg_TWHEventDigestSubject**: subject of a digest e-mail message
   - **mkMsg_TWHEventNotificationSubject**: subject of an individual event e-mail message

   Modify the file as desired.
3. Save your changes and close the file.
4. Restart the Variable Data Print server. Any changes to event notification take effect only after the system is restarted.

Important: Any changes that you make to **historyeventmsgs.properties** will be overwritten the next time that you update your system. We strongly recommend that you make a copy of the modified file, and save the copy in a safe location. The next time that you update your system, you can reinstate any previous e-mail message customization by replacing **historyeventmsgs.properties** in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\rto\Creo\en** with the copy of the file that you saved to another location.

Adding Languages

English is the default language for system and event notification e-mail messages, but you can set up the system to send e-mail messages in another language.

The printer is responsible for having translations done to acceptable industry standards, and for maintaining the integrity of any e-mail message stylesheet or properties files.

Note: The system can send e-mail messages in only one language. If you choose to replace the existing English files with files in another language, e-mail messages will be sent in that language only.

To set up system messages to be available in another language:

1. Identify the files in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en** and **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en\CSR** that you want to translate.
2. Send the files for translation.
3. When the translation is complete and validated, replace the English files in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en** and **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en\CSR** with the translated files.

To set up event notification messages to be available in another language:

1. In **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\rto\Creo\en**, identify the sections in the file **historyeventmsgs.properties** that you want to translate. Identify and tag any sections that should not be translated.
2. Send the file for translation.
3. When the translation is complete and validated, replace the English **historyeventmsgs.properties** file in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\rto\Creo\en** with the translated file.
4. Restart the Variable Data Print server. Any changes to event notification take effect only after the system is restarted.

6

Customizing the User Interface

Overview....48
Applying the New Look....48
Modifying the Default Theme....48
Customizing the Web Interface Logon Page....50

Overview

When your Variable Data Print system is installed, a new 'look' (which controls the appearance of the toolbar and Operations palette on your site's Web pages) should be applied during installation. You can verify that the new look is applied to your system or update your system to use the new look by following the procedure in *Applying the New Look* on page 48.

One limitation of using the new look is that you can apply only one 'theme' to your system. Themes control the appearance of headers, footers, and colors on your site's Web pages. When the new look is applied, one default theme controls the display of all Web pages; you can modify the theme to display your company's branding and contact information in page headers and footers (see *Modifying the Default Theme* on page 48), but you cannot create different themes for specific customers.

We recommend that you apply the new look to your site's Web pages and use the default theme. If you want to apply the new look but you *must* be able to create different Web headers and footers for specific customers, contact your Kodak service representative.

You can still modify the image that appears on your Web site's logon page to display your company's branding (see *Customizing the Web Interface Logon Page* on page 50).

Applying the New Look

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 10).
2. Click **Configuration Settings > System and Networking**.
3. If the check box next to **InSite Creative 3.0 Web Page Appearance** is selected, the new look is applied. If the check box is not selected, the old look is still applied. To apply the new look, select the check box.
4. Click **Update** to save and apply the changes.

Modifying the Default Theme

When you apply the new look, one theme controls the appearance of your Web pages' headers, footers, and colors. You can modify this theme to reflect your company's branding in the headers and footers throughout your site—for example, to display your company's logo in the header and your company's contact information in the footer.

Modifying the default theme requires some knowledge of HTML and XML.

To make a copy of the theme files:

The files that control the appearance of your Web pages' headers and footers are stored in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\SystemThemes\7917A0869761B5458281E407AE0090F5**. However, if you modify the files in this location, your changes may be overwritten the next time that you update your system. We recommend that you make a copy of the files and modify the copies instead, as described in the following steps.

1. Browse to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\CustomThemes**.
2. Make a copy of the folder **90357D82287B094BBED49FF9D209B3DB_template** and rename the copy to **90357D82287B094BBED49FF9D209B3DB** (that is, remove **_template** from the folder name).
3. Browse to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\SystemThemes\7917A0869761B5458281E407AE0090F5** and copy all of the files in the folder.
4. Paste the files into the **CustomThemes\90357D82287B094BBED49FF9D209B3DB** folder that you created in step 2.
5. Modify the header and footer files as described in the following sections.

   When displaying your Web pages' headers and footers, the system looks for the **CustomThemes\90357D82287B094BBED49FF9D209B3DB** folder first. If the folder does not exist or there are no files in the folder, the system looks in the **SystemThemes\7917A0869761B5458281E407AE0090F5** folder.

   When you update your system, the files in **SystemThemes\7917A0869761B5458281E407AE0090F5** may be overwritten but the files in **CustomThemes\90357D82287B094BBED49FF9D209B3DB** will not be overwritten.

To customize the header with your company's branding:

1. Copy the images that you want to use in the header to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\header**.

   Images must be GIF or JPEG files. You can customize the header background and banner, so you may have multiple images that you want to use.
2. Browse to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\CustomThemes\90357D82287B094BBED49FF9D209B3DB**.
3. In a text editor, open **HeaderText.html**.
4. Replace the names of the image files with the names of the files that you copied to the **header** folder. Ensure that you reference the image's absolute path; otherwise, the image may not appear.
5. Save your changes and close the file.

To customize the footer with your company's branding:

1. Browse to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\CustomThemes\90357D82287B094BBED49FF9D209B3DB**.
2. In an XML editor, open **Footer.xml**.
3. Uncomment the footer links that you want to appear in the footer and modify the links as desired. You can insert text and hyperlinks into the footer; you cannot insert images.

   If you want the link to appear as a clickable hyperlink, set `FooterLink hyperlink` to `"true"`. To include a URL to which the hyperlink will point, include the full path starting with `http://`. For example, a hyperlink in the footer to Kodak's Web site would look like:

   ```
   <FooterLink hyperlink="true" caption="Kodak" url="http://graphics.kodak.com"/>
   ```
4. Save your changes and close the file.

Customizing the Web Interface Logon Page

The default theme does not control the large image in the center of your Web site's logon page. You can modify the logon page to display your company branding instead of the default image. Modifying the logon page requires some knowledge of HTML.

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 10).
2. Click **Customization**.
3. In the **Printer Customization** area, click **Browse**.
4. Open the **login** folder.
5. Make a copy of **CustomLoginContentTemplate.html** and rename it **CustomLoginContent.html**. Save it in the **login** folder.
6. Copy into the **login** folder the image that you want to appear on the logon page.

   The image must be a GIF or JPEG file with a maximum width of 650 pixels and a height of 470 pixels so that it fits the interface.
7. In a text editor, open **CustomLoginContent.html**, and scroll to the HTML table code at the bottom of the file. (The table code starts with `<TABLE>` and ends with `</TABLE>`.)

   You can increase your formatting options by adding table cells or rows, or new tables. Be aware that tables may be displayed inconsistently across different browsers.

8. After the tag `<!--Insert Content Here-->`, type the HTML required to display your logon page content, such as text or images.

   For example, to display an image called **CompanyImage.jpg**, insert the line

   ```
   <IMG SRC="/TwAmWeb/custom/login/CompanyImage.jpg" BORDER="0"
   WIDTH="650" HEIGHT="470">
   ```

   Any image that you want to reference must exist in the **login** folder. Ensure that you reference the image's absolute path; otherwise, the image may not appear.

9. Save your changes and close the file.

7

Backing Up the System

Overview 54
Triggering the System Backup Process 54
Setting Up Your Data Backup Process 55
What To Do If Backup Fails 56

Overview

It is essential that you regularly back up your system, in the event that you experience disk failure, power outage, or virus infection and need to restore lost or damaged data. We recommend that you back up your system daily to ensure maximum data recovery. You should also run regular tests to ensure that your backup files will be available in the event of an emergency.

There are two main parts to backing up your system. The first part—the system backup—can be configured to run automatically for you. The second part—the data backup—is *your responsibility* to set up and perform on a regular basis.

During system backup, the Variable Data Print server's Oracle® database, the System drive, and files on the Data drive in **\inetpub\wwwroot\TwAmWebRoot** are automatically saved to a backup file called **SysStateBackup.bkf**. You are responsible for storing a copy of this file, for example, to another server or to tape. (For details about the system backup process, see *Triggering the System Backup Process* on page 54.)

However, the system backup does not back up any of the project information on your Data drive. You are responsible for implementing your own backup solution to back up and store the files on your Data drive. For more information, see *Setting Up Your Data Backup Process* on page 55.

For detailed instructions on how to configure, back up, and recover backups for Variable Data Print, contact your Kodak service representative.

Triggering the System Backup Process

The system backup can be configured to run automatically, and consists of two parts.

First, an Oracle database backup, triggered by Oracle Backup Manager, runs automatically each day. The default time is 3:00 AM, although your service representative can change the scheduled time for you. This backs up the Oracle database on the Variable Data Print server.

The backed up Oracle database files are placed on the DataLog drive in **\Orant\Oracle\ArchivedLogFiles\Backups**. Oracle backup log files are also created and placed on the System drive in **\Oracle\ORA92\Creo\Logs**.

The completion of the Oracle database backup triggers the Variable Data Print Online Backup. Variable Data Print Online Backup backs up the following files:

- Everything on the System drive
- The backed up Oracle database files on the DataLog drive in **\Orant\Oracle\ArchivedLogFiles\Backups**
- All files on the Data drive in **\inetpub\wwwroot\TwAmWebRoot**

Variable Data Print Online Backup checks the backup, updates the primary registry key, and creates the backup file **SysStateBackup.bkf**, which it places on the DataLog drive in **\AraxiBackup**. (Backup log files are also created and placed on the System drive in **\Creo\TWAM\System\Log\Backup**. You can check the latest log file to verify whether an Online Backup was successful.)

You are responsible for storing a copy of the backup file **SysStateBackup.bkf** according to your backup plan—for example, to another server or to tape. We recommend that you automate copying of the backup file to the desired storage location on a daily basis.

To ensure that Variable Data Print Online Backup is triggered after the Oracle backup, take the following steps:

1. On the Variable Data Print server, open the folder **<System drive>\Oracle\ORA92\Creo\Util**.
2. In a text editor, open **SuccessfulBackup.cmd**.
3. Edit the file to remove `REM` from the beginning of the line `%AraxiHome%\TWAMInstall\...StartAraxiBackup.cmd`.

   This line tells Online Backup to start after a successful Oracle backup is completed.
4. Save and close the file.
5. In a text editor, open **UnSuccessfulBackup.cmd**.
6. If you want Online Backup to start even if the Oracle backup is not successful, edit the file to remove `REM` from the beginning of the line `%AraxiHome%\TWAMInstall\...StartAraxiBackup.cmd`. If you want Online Backup to start only when the Oracle backup is successful, do not modify the file.
7. Save and close the file.

   The next time Oracle backup finishes, Online Backup will be triggered accordingly.

Setting Up Your Data Backup Process

As described in *Triggering the System Backup Process* on page 54, Variable Data Print Online Backup automatically backs up certain files on the System, DataLog, and Data drives on your Variable Data Print server. However, you are responsible for implementing your own backup solution to back up and store the project and element files on your Data drive.

The amount of information on your Data drive may be very large. It is up to you to choose and implement a third-party backup solution that meets your needs. Variable Data Print does not have any special backup constraints, so any standard backup solution should work.

We recommend that you automate the backup to run on a daily basis.

We recommend that you back up the following folders on the Data drive:

- **Projects**—Contains any elements uploaded to projects and other project-related information. It is critical that you back up the contents of this folder.
- **TWSystemData**—Contains cached thumbnail images. It is not critical that you update the contents of this folder, but if you do not, the system will have to regenerate the thumbnails as needed.
- **inetpub**—The contents of this folder are already backed up as part of the **SysStateBackup.bkf** backup file, but you may want to back up the files in this folder again for redundancy.
- **Oracle**—The contents of this folder are already backed up as part of the **SysStateBackup.bkf** backup file, but you may want to back up the files in this folder again for redundancy.

What To Do If Backup Fails

Monitor your system on a regular basis to ensure that backup is successful. (You should check the Variable Data Print server regularly to ensure that enough disk space is available for the files that are created during the backup process.) It is essential that you have the most up-to-date backup data available, should you be required to recover your system.

Online Backup automatically monitors the system to confirm system backup success, but you must monitor the success of your Data drive backup.

If backup fails, try to determine why it failed. Backup may fail for a number of reasons, including insufficient disk space or network problems. If you can identify the cause of the failure, take appropriate steps to prevent future failures, if possible.

If you cannot identify the cause of the failure, or if failure persists, contact your service representative.

A

Configuration Settings

Overview....58
Printer Information....58
Security....59
System and Networking....60
Co-operating Systems....62
Workflow....63
Rendering....64
Notification....65
eCentral....66
Distribution Server....67
Color Management....67

Overview

This appendix describes the settings that you can view in InSite Creative Administration when you click **Configuration Settings**. You can modify some of the settings; others are read-only.

Printer Information

These settings define your company information and Web site URL.

Setting	Description
Printer Name	The company name that your users see when they log on to the system Any change to this setting takes effect immediately.
TwEm Administrator Email	The e-mail address that your users should contact if they need assistance or information You must also specify the administrator e-mail address to ensure that your system administrator receives any e-mail notifications about system activity, and to enable event notification. Any change to this setting takes effect immediately.
TwEm Home Page	The Web site URL that your users log on to **Note:** The Web site URL must also be specified in order for Web browser links to be included in event notification e-mail messages, and to enable the generation of event reports. Any change to this setting takes effect immediately.

Security

These settings define the level of security applied to the Variable Data Print system.

Setting	Description
Enforce Strong Passwords	Requires that strong passwords be used when setting or changing passwords. If you do not require this level of security, clear the check box. Strong passwords are recommended to prevent unauthorized users from gaining access to your system. Strong passwords are passwords that are not easily guessed or broken. They should be eight or more characters long and should contain a combination of different types of characters from at least three of the following types: • Uppercase letters (A, B, C,...Z) • Lowercase letters (a, b, c,...z) • Numerals (0, 1, 2,...9) • Non-alphanumeric special characters such as punctuation or symbols ({, }, #, $, %) This setting is configured during the Variable Data Print installation and it is unlikely that you will need to change it later. Any change to this setting takes effect immediately. For more information about strong passwords, see *About Strong Passwords* on page 5.
Customer User Session Timeout	The number of minutes that a customer user's session can be idle before it is disconnected. The default setting is 20 minutes. You might want to decrease the time that a session can be idle in order to tighten the security of your system. Any change to this setting requires a restart of Variable Data Print to take effect.
Staff User Session Timeout	The number of minutes that a staff user's session can be idle before it is disconnected. The default setting is 20 minutes. You might want to decrease the time that a session can be idle in order to tighten the security of your system. Any change to this setting requires a restart of Variable Data Print to take effect.
Desktop Application Session Timeout	This setting is not applicable to Variable Data Print.
Smart Review Service Communication Port	This setting is not applicable to Variable Data Print.

Setting	Description
Browser Security	The level of encryption that must be used when information is transferred between a client workstation and the Variable Data Print server. • Allow HTTP Access: information does not require encryption • HTTPS (SSL) Access Only: information must be encrypted to at least 56 Bits. • 128-Bit HTTPS (SSL) Access Only: information must be encrypted to least 128 Bits. This setting is configured during the Variable Data Print installation and it is unlikely that you will need to change it later.

System and Networking

These settings define where projects are stored and the frequency at which deleted elements and projects are purged from disk.

Setting	Description
InSite Creative 3.0 Web Page Appearance	Select or clear the check box to control the appearance of the toolbar and Operations palette on your site's Web pages. When you select this option, a new 'look' is applied to your site's Web pages.For more information, see Chapter 6, *Customizing the User Interface*. Any change to this setting takes effect immediately.
Project Home	The location where projects are stored. This is typically the Data drive on the Variable Data Print server. If you want to change the project storage location to a tertiary server, contact your Kodak service representative for assistance. Any change to this setting takes effect immediately.
Library Home	This setting is not applicable to Variable Data Print.

Setting	Description
Delayed Delete Start Times	**Note:** Set this setting in conjunction with the **Delayed Delete Duration in Minutes** and **Delayed Delete Delay in Days** settings. The time of day (on the 24-hour clock) at which you want purging of deleted files to begin. For example, type `04:00` to start the purge at 4:00 AM. You can specify multiple times, separated by semicolons, if desired. For example, type `04:00;22:00` to purge files at 4:00 AM and again at 10:00 PM on each day that file purging is performed (as specified in the **Delayed Delete Delay in Days** box). Any change to this setting takes effect immediately. For more information about purging deleted files, see *Changing File Delete Times* on page 16.
Delayed Delete Duration in Minutes	**Note:** Set this setting in conjunction with the **Delayed Delete Start Times** and **Delayed Delete Delay in Days** settings. The amount of time that you want the system to spend purging files. For example, type `30` for the system to spend 30 minutes purging files at each purge time specified in the **Delayed Delete Start Times** box. After the purge duration has passed, purge activity stops regardless of whether all deleted files are purged from the system. You might want to set the purge duration to a short time if you are concerned that the purge process will impact system performance for your users. You can specify multiple durations, separated by semicolons, if desired. Each duration that you specify corresponds to a purge time that you typed in the **Delayed Delete Start Times** box. For example, if you entered two delete start times in the **Delayed Delete Start Times** box, you should enter two durations in the **Delayed Delete Duration in Minutes** box. Example: **Delayed Delete Delay in Days:** `3` **Delayed Delete Start Times:** `04:00;22:00` **Delayed Delete Duration in Minutes:** `30;10` In this example, files are purged from disk every three days. At 4:00 AM every three days, files are purged for a duration of 30 minutes. At 10:00 PM every three days, files are purged for a duration of 10 minutes. Any change to this setting takes effect immediately. For more information about purging deleted files, see *Changing File Delete Times* on page 16.

Setting	Description
Delayed Delete Delay in Days	**Note:** Set this setting in conjunction with the **Delayed Delete Start Times** and **Delayed Delete Duration in Minutes** settings. The number of days after which deleted files are purged from disk. For example, if you type 3, deleted files are purged from disk every three days. If you type 0, deleted files are purged daily. You might want to reduce the frequency if you are concerned about the purge process impacting system performance. You might want to increase the frequency if you often have many deleted files to purge. Any change to this setting takes effect immediately. For more information about purging deleted files, see *Changing File Delete Times* on page 16.

Co-operating Systems

These settings define the other servers that the Variable Data Print server connects to.

Setting	Description
Co-operating InSite server	In an integrated system, the name of the Storefront server to which the Variable Data Print server is connected. This setting is configured during the Variable Data Print installation and cannot be modified through InSite Creative Administration. In a stand-alone system, this setting displays as **None**.
Co-operating Prinergy server	In an integrated system, the name of the Prinergy server to which the Variable Data Print server is connected. This setting is configured during the Variable Data Print installation and cannot be modified through InSite Creative Administration. In a stand-alone system, this setting displays as **None**.

Workflow

These settings define your users' ability to download JPEG versions of elements.

Setting	Description
Resolution for LowRes RGB JPEG Proofs	The resolution options available to users when downloading low-resolution JPEG versions of elements. Separate multiple values by semicolons—for example, `72;150;300`. Any change to this setting takes effect immediately. For more information, see *Specifying JPEG Download Options* on page 15.
Allow Download of LowRes JPEG Images from libraries	This setting is not applicable to Variable Data Print.
Resolution of printable FPO previews	This setting is not applicable to Variable Data Print.
Generate compressed FPO previews	This setting is not applicable to Variable Data Print.
Generate printable FPO previews	This setting is not applicable to Variable Data Print.
Fail On Missing Fonts	This setting is not applicable to Variable Data Print.
Do Font Processing on PDFs	This setting is not applicable to Variable Data Print.

Rendering

These settings define how element thumbnails are created and cached when elements are uploaded.

Setting	Description
Raster Cache Image Size	This setting is not applicable to Variable Data Print.
Pre-Render Processing Level	Specifies whether a thumbnail of an element should be pregenerated and cached when the element is first uploaded. Generating a thumbnail of an element even before the element is viewed as a thumbnail speeds up the initial display of the element. However, uploading the element will take longer, and more disk space is required on the Variable Data Print server. You may choose not to pregenerate thumbnails if upload speed is a concern or disk space is limited. Type **0** or **1** in the box as follows: • **0**—No thumbnail of the element is created on upload. In this case, no element thumbnail is pregenerated, but Variable Data Print still creates a thumbnail of the element "on the fly" when you view the element as a thumbnail. • **1**—A thumbnail of the element is created on upload. Any change to this setting takes effect immediately.
Preserve Intermediate Render Cache	This setting is not applicable to Variable Data Print.
Generate Large Thumbnails	This setting is not applicable to Variable Data Print.
Generate Small Thumbnails	When element thumbnails are pregenerated on element upload (as specified in **Pre-Render Processing Level**), small thumbnails are generated. Small thumbnails are used in the Web interface. Any change to this setting takes effect immediately.

Notification

These settings define the behavior of event notification.

Setting	Description
Send Customer Email Notification	Enables event notification for all customer users. **Note:** Even when this setting is enabled, only those users whose e-mail addresses are specified in their user accounts will actually receive event notifications. Any change to this setting takes effect immediately. For more information about task event notification, see Chapter 5, *Setting Up Event Notification and Reporting*.
Email Notification Timeout	The number of minutes that the server will wait before sending individual notification messages to users. The default time is 30 minutes, but you might want to specify a shorter time so that users receive notifications more quickly and so that notification messages do not include multiple events. Any change to this setting takes effect immediately. For more information about task event notification, see Chapter 5, *Setting Up Event Notification and Reporting*.
Email Digest Wakeup Time	The time of day (on the 24-hour clock) at which you want the server to begin sending event notification messages in summary digest format. The default time is 01:00 (1:00 AM). Any change to this setting takes effect immediately. For more information, see *Configuring Notification Delivery Times* on page 38.

eCentral

These settings define your Variable Data Print server's ability to send statistical information to eCentral and to download software updates from eCentral.

Setting	Description
Enable eCentral Logging	Select this check box to allow the Variable Data Print server to update eCentral with Variable Data Print statistics whenever a user logs in to Variable Data Print. This enables your service representative to retrieve information on your system to assist with troubleshooting and to keep your system up to date. The information gathered includes your company name, the URL that your users use to log on to the system, the type of user logging on (staff user or customer user), their operating system and Web browser, and the time and date of the logon. This setting is set during the Variable Data Print installation and likely will not need to be changed later. Any change to this setting takes effect immediately.
Enable eCentral Automated Software Updates	Select this check box to allow the Variable Data Print server to query eCentral for new software updates and automatically download them. After software updates are downloaded, Variable Data Print sends an e-mail notification to the e-mail address specified in the **Email address for software updates notification** box. This setting is set during the Variable Data Print installation and likely will not need to be changed later. Enabling eCentral updates does not affect performance or compromise security in any way. However, disabling eCentral updates may affect your service representative's ability to support and update Variable Data Print. Any change to this setting takes effect immediately.
Email address for software updates notification	The e-mail address that Variable Data Print notifies when a software update is automatically downloaded from eCentral. This is set during the Variable Data Print installation, but you might want to change it later, for example, if your system administrator's e-mail address changes. Any change to this setting takes effect immediately.

Distribution Server

These settings define the number and distribution of rendering engines in your Variable Data Print system.

Setting	Description
Total Number of Rendering Engine Licenses	The number of rendering engines licensed for your system. These engines render the thumbnails of elements in projects. This setting is read-only.
Number of Assigned Licenses	The number of rendering engine licenses currently in use. This setting is read-only.
Distribution	The distribution of rendering engines across the various servers in your system. Typically you will have one rendering engine on your Variable Data Print server (the localhost). Any change to this setting requires a restart of Variable Data Print to take effect.

Color Management

The settings in this section are not applicable to Variable Data Print.

Glossary

Asset Library software	Software that enables you and your team to create libraries in which you can store elements for reuse.
caching	The process of creating and storing temporary image data to improve subsequent performance.
Creative Workflow system	Software that enables you and your team to create projects in which you can manage and share elements. A collaborative workspace that—depending on whether the Tasks feature is licensed for your system—you can also use to manage the review and approval of elements. When you run Variable Data Print in conjunction with Creative Workflow, they share the same projects.
elements	Individual images, piece of artwork, or other files.
Prepress Portal system	A portal to upload the pages of a publication into your printer's production workflow, check the status of print jobs, and collaborate with others to remotely proof and approve pages of the job.
projects	Workspaces where you can create variable data print (VDP) templates, publish VDP templates to Kodak InSite Storefront catalogs (if you are running Variable Data Print integrated with Storefront), and personalize VDP templates. You can also use projects as collaborative workspaces to share elements with others by uploading and downloading the elements.
right	See *user right*.
role	A collection of *user rights*.
Storefront system	A Web portal through which printers set up and manage an online store, and print buyers order printing products.
user right	A single setting that determines your ability to take a specific action.
Variable Data Print system	Software that enables you and your team to create variable data print (VDP) templates within projects, publish VDP templates to Storefront catalogs (if you are running Variable Data Print integrated with Storefront), and personalize VDP templates to create print items. When you run Variable Data Print in conjunction with Creative Workflow, Variable Data Print and Creative Workflow share the same projects. The Variable Data Print functionality is available through the **Variable Data Print** tab in each project.

Index

A

administrator e-mail address, specifying, 14, 66

B

backup
  data backup
    files to back up, 56
    setting up, 55
  developing a backup strategy, 54
  failure of, 56
  importance of, 54
  Online Backup
    about, 54
    triggering, 55
  Oracle database backup, about, 54
  system backup, triggering, 54
  your responsibilities, 54
browser compatibility, 3

C

company information, editing, 14
configuration settings, in InSite Creative Administration, 58
critical updates, installing, 5
customer administrators, creating, 31
customer profiles, creating, 11
customer usage, generating reports
  about, 11
customer users
  assigning roles to, 29
  changing session timeouts for, 15
  typical types of, 29

D

Darwin, about, 2
deleting files from disk, specifying purge times, 16
DMZ network configuration, installing Variable Data Print in, 6

E

e-mail addresses, specifying
  for staff users, 27
  for system administrator, 14, 66
e-mail messages
  customizing event notification messages
    content, 44
    languages, 44
  customizing system messages
    content, 42
    languages, 44
  sending to users, 12
event notification
  about, 36
  configuring settings for a role, 38
  configuring the system for, 37
  customizing e-mail messages, 44
  delivery times
    about, 36
    configuring, 38
  event types described, 39
  formats, 36
  overriding settings for a role, 38
  viewing settings for a role, 38
event reporting
  about, 40
  event types described, 41
  generating event reports, 41

F

failure, backup, 56
features, viewing licensed, 10
firewalls, about, 4
footers in Web interface, customizing, 48
frequently asked security questions, 7
full-access staff users, creating, 27

H

hardware components, 3
headers in Web interface, customizing, 48

I

InSite Creative Administration
  configuration settings, 58
  starting, 10
interface, customizing. *See* Web interface, customizing
Internet security. *See* security

J

JPEG files, specifying resolution options, 15

L

License Manager, opening, 10
licensing
  about, 10
  modifying licenses, 10
  viewing licensed features, 10
limited-access staff users, creating, 27
logon page, modifying, 50

M

Microsoft hotfixes
  about, 5
  automatically installing, 5
multi-customer users, creating, 28

N

network security. *See* security
new look, applying to Web interface, 48
notification. *See* event notification

O

Online Backup
  about, 54
  triggering, 55
Oracle database backup, about, 54

P

passwords, implementing strong passwords, 5, 59
purging deleted files from disk, specifying times, 16

R

reporting. *See* event reporting
restarting Variable Data Print, 12
roles
  about, 20, 33
  assigning to customer users, 29
  assigning to staff users, 26
  changing names of, 22
  configuring event notification for, 38
  creating, 21
  default roles, about, 25
  deleting, 22
  limitations of assigning, 34
  notification event types described, 39
  overriding, 33
  overriding notification settings for, 38
  typical users in a sample system, 32
  user rights described, 23

S

security
  DMZ network configuration, 6
  firewalls, 4
  frequently asked questions, 7
  installing Microsoft hotfixes, 5
  optional security measurements, 4

- required security measurements, 4
- responsibilities, 4
- SSL certificates, installing, 6
- strong passwords, 5, 59

session timeouts, changing, 15
SMTP e-mail server, configuring to support event notification, 37
software components, 3
SSL certificates, installing, 6
staff users
- assigning roles to, 26
- changing session timeouts for, 15
- creating accounts for, 27
- typical types of, 26

stopping Variable Data Print, 12
strong passwords, implementing, 5, 59
system activity, monitoring, 11
system components, 3
system security. *See* security

T

themes, customizing, 48
thumbnail caching, enabling, 15, 64

U

upload activity, generating reports
- about, 11

usage reports, generating, 11
user rights
- about, 20
- descriptions, 23

users
- customer administrators, creating, 31
- customer users
  - assigning roles to, 29
  - typical types of, 29
- full-access staff users, creating, 27
- limited-access staff users, creating, 27
- multi-customer users, creating, 28
- sending e-mail messages to, 12
- staff users
  - assigning roles to, 26
  - creating accounts for, 27
  - typical types of, 26
- typical users in a sample system, 32
- viewing who is currently logged on, 11

V

Variable Data Print
- about, 2
- customization, overview, 48
- restarting, 12
- stopping, 12
- supported operating systems, 2
- system components, 3
- templates, creating, 2
- Web browser compatibility, 3

VDP. *See* Variable Data Print

W

Web browser compatibility, 3
Web interface
- customizing
  - applying the new look, 48
  - default theme, modifying, 48
  - footers, modifying, 48
  - headers, modifying, 48
  - logon page, modifying, 50
  - overview, 48
- supported operating systems, 2

Web site URL, specifying, 14

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