

InSite Variable Data Print 3.0 Integrated With InSite Storefront

System Administration Guide

English

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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 an integrated environment with the Kodak InSite Storefront 5.0 system.

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 Integrated With Prepress Portal 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. If you are running Variable Data Print integrated with Storefront, you can also publish VDP templates to Storefront catalogs. Users can then order print jobs based on the templates directly through Storefront.

For detailed instructions on uploading a Darwin job to a project, creating a VDP template, making the template available for personalization, publishing the template to a Storefront catalog, 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

System Architecture

Figure 1 illustrates how a typical Variable Data Print system might be set up as part of your network. Your users access Variable Data Print through a Web browser. Users log on through your Storefront server. If Variable Data Print user rights are enabled, users are directed to a home page offering both ordering and projects.

The Variable Data Print server has its own Oracle® database.

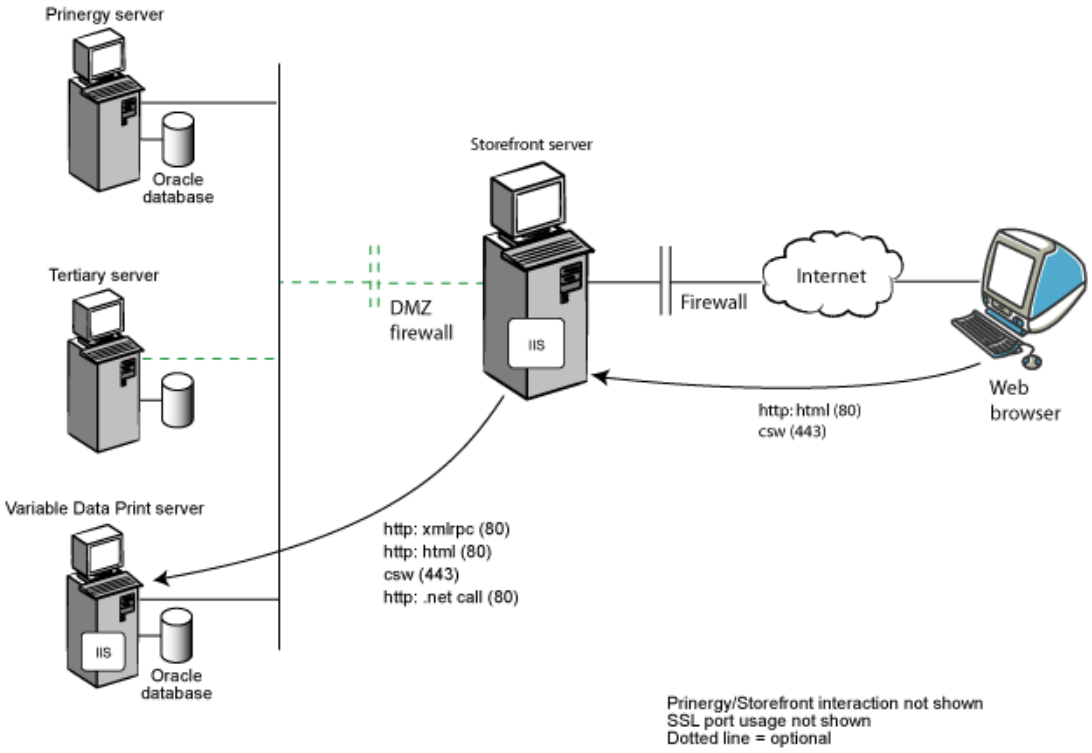


Figure 1: Variable Data Print system architecture

Security

Any necessary system security (such as firewalls and SSL certificates) should be implemented when the Storefront system is installed, and you should not have to implement additional security when adding Variable Data Print. (For information about planning system security, see the *Storefront System Administration Guide*.)

However, you should consider enforcing the use of strong passwords to access your Variable Data Print server. You should also ensure that critical Windows updates are applied to the server, just as you apply critical updates to your Storefront server.

Important: 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 the Variable Data Print software.

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 8.)

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**.

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Setting Up and Maintaining the System

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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.

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 8.)
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 8.)
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 9.)

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.

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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 8).

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.

   If you are running Variable Data Print in conjunction with Storefront, your Web site URL should be the logon page's URL.

   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 35.
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 60.

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

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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 30.

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).

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	Customer roles can be assigned to staff users at the site level. Only the Manage Access user right has any effect. It enables the staff user to manage project access for other staff users at the site level, and to manage project access for customer users at the customer level for any customer to which they have access.	Customer roles can be assigned to customer users at the customer level. Only the Manage Access user right has any effect. It enables the customer user to manage project access at the customer level for other users in their organization.	Cannot be assigned
Project	Staff users	Customer users	Customer users

You create all system/customer and project roles in InSite Creative Administration. (See *Creating Roles* on page 19.) When integrated with Storefront, you perform all staff user account creation and role assignment in Storefront. See *Assigning Roles to Typical Staff Users* on page 24.

Note: A staff user can see the projects for customers only after they are assigned a project role at the site level.

To create customer users and assign roles to them, you use Storefront. This is discussed in more detail in *Assigning Roles to Typical Customer Users* on page 27.

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 23.) 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 24. 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 21.)
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 24 and *Assigning Roles to Typical Customer Users* on page 27.

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	Assign customer and project roles to staff users at the site level, and to customer users at the customer level for any customer	Assign customer and project roles to users at the customer level	N/A (System/customer roles cannot be assigned at the project level.)
Create Customer	This right has no effect. The ability to create customers is controlled by the Storefront customer user rights.	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	This right has no effect. The ability to modify customers is controlled by the Storefront customer user rights.	This right has no effect.	N/A (System/customer roles cannot be assigned at the project level.)
Delete Customer	This right has no effect. The ability to delete customers is controlled by the Storefront customer user rights.	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	Within any project to which the user has access, assign project roles to customer users 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 19.) 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 Your Site Administrator

When you install a new Storefront system, a site administrator account called Administrator is automatically created in Storefront. This user account is automatically assigned Storefront system, admin, and job roles to give the site administrator full access to the system and to allow them to create other staff and customer users. However, the site administrator is not automatically assigned project roles. You must manually assign these roles to the site administrator in order for the site administrator to have the ability to manage project access for other staff and customer users.

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
2. Click **Staff Users**, and then click the name of the site administrator.
3. Assign the site administrator an Administrator system role and Administrator project role, and click **Update**.

   You can now use the site administrator account to create other staff user accounts as described in the following sections.

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 and orders for each customer ▪ Edit any customer's contact information ▪ Create customer user accounts for any customer, and assign roles to those customer users ▪ Manage access to specific projects at the project level (that is, enable customer users to access only specific projects)	*Full-Access Staff User* on page 25
Limited-access staff user (a staff user that can see specific customers only)	Site administrator	▪ Edit the contact information for any customer they can see ▪ Create customer user accounts for the customers to which they have access, and assign roles to those customer users ▪ Manage access to specific projects at the project level for the customers to which they have access	*Limited-Access Staff User* on page 26
Multi-customer user (a customer user with access to more than one customer)	Site administrator or staff user	See multiple customers when they log on, and access all of the projects and orders for each of those customers	*Multi-Customer User* on page 26

Full-Access Staff User

1. Log on to Storefront as the site administrator.
2. Click **Staff Accounts**.
3. Create a staff user account and assign the user Storefront system, admin, and job roles as desired. (For instructions, see the Storefront Help.)
4. Click **Manage Project & Library Access**.
5. In the Managing User Access at Site view, assign the staff user the Administrator customer role and Administrator project role. This enables the staff user to manage project access at the customer level for any customer in your system.
6. Click **Update**.

Limited-Access Staff User

1. Log on to Storefront as the site administrator.
2. Click **Staff Accounts**.
3. Create a staff user account, restrict the staff user to have access to specific customers only, and assign the user Storefront admin and job roles for each customer as desired. (For instructions, see the Storefront Help.)
4. Click **Manage Project & Library Access**.
5. In the Managing User Access at Site view, assign the staff user the Administrator customer role and Administrator project role. This will enable the staff user to manage project access at the customer level, but only for those customers to which they have access.
6. Click **Update**.

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 Storefront as the site administrator or as another staff user with the ability to manage project access at the customer level for all customers.
2. Create the multi-customer user and assign them admin and job roles for each customer to which they will have access. (For instructions, see the Storefront Help.)
3. Go to the Customers view.
4. Select the first customer to which the MCU has access and click **Administration**.
5. Click **Manage Project & Library Access**.
6. In the Managing User Access at Customer view, find the MCU in the list and assign them the desired project role for the current customer. This determines the user's ability to work in any of the customer's projects.

   Assuming that you do not want this user to be able to manage project access for this customer, do not assign a customer role.
7. Click **Update**.
8. On the toolbar, click **Customers**, click the name of the next customer to which the user has access, and click **Administration**.
9. Repeat steps 5-7 to assign a project role to the user for this customer.
10. Repeat the procedure until project roles have been assigned to the MCU for each customer to which they have access.

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 and orders for their company • Edit their company's contact information • Create customer user accounts for their company employees and assign roles to those users • Manage access to specific projects at the project level	*Customer Administrator* on page 28
Full-access customer user	Customer administrator	• See all projects and orders for their company • Manage access at the project level for specific projects, *if* their project role includes the Manage Access user right	Variable Data Print Help

User	Must Be Created By	Can	To Create, See
Limited-access customer user that can see only the projects they create themselves	Customer administrator	▪ See only the projects they create (may also be able to see all or only specific orders, depending on their Storefront rights) ▪ Manage access for the projects they create, *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	▪ See only the projects to which they have been given access (may also be able to see all or only specific orders, depending on their Storefront rights) ▪ Manage access for the projects they can see, *if* their project role includes the Manage Access user right	Variable Data Print Help

Customer Administrator

1. Log on to Storefront as the site administrator or as another staff user with the ability to manage project access at the customer level for all customers.
2. Click **Customers**, select the customer for which you want to create a customer administrator, and click **Administration**.
3. Create the user and assign the user Storefront admin and job roles as desired. (For instructions, see the Storefront Help.)
4. Click **Manage Project & Library Access**.
5. In the Managing User Access at Customer view, find the user that you just created and assign them the Administrator customer role and Administrator project role.
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 24 and *Assigning Roles to Typical Customer Users* on page 27, 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 23.)

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.

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

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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 37.)

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 36.

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 36.

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 8).
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 34, 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 34.)
4. Click **Update**.

Viewing and Overriding Notification Settings

When you view a staff user's account in Storefront, 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 39.

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.

Note: All of stylesheets listed in Table 11 are duplicated on the Storefront server in **<Data drive>\inetpub\wwwroot\PrinergyWebRoot\RUser\custom\emailTemplates\en**. You should modify these stylesheets on the Storefront server first, and then copy the modified **.xsl** files to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en** on the Variable Data Print server. This ensures that the files remain in sync across the servers.

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.

Stylesheets	Purpose
ForgotPassword_Subject.xsl	Subject line included in the message based on ForgotPassword_Body.xsl
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 12).
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 any language that Variable Data Print supports.

Users select a language when they update their user profile. If a translation of the system message stylesheets and event notification message properties file is available in the selected language, the system sends e-mail messages to the user in that language.

Note: If the user selects a language in their user profile that is supported by Storefront, but not by Variable Data Print, any e-mail messages from Variable Data Print will be sent to the user in English.

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.

To view the languages that Variable Data Print supports:

- In InSite Creative Administration, on the Home page, expand the language menu.

To set up system messages to be available in other languages:

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, organize the translated files into language-specific folders in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates**. Within each folder, use the same file names for the translated files as for the original English version of the files.

   You must use the following language codes when naming each language-specific folder:

Language	Code
English	en
French	fr
German	de
Italian	it
Japanese	ja
Spanish	es

To set up event notification messages to be available in other languages:

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, organize the translated files into language-specific folders in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\rto\Creo**. Within each folder, use the same file name for the translated file as for the original English version of the file (**historyeventmsgs.properties**).

You must use the following language codes when naming each language-specific folder:

Language	Code
English	en
French	fr
German	de
Italian	it
Japanese	ja
Spanish	es

4. Restart the Variable Data Print server. Any changes to event notification take effect only after the system is restarted.

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Customizing the User Interface

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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 project 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 46.

Once the new look is applied, you can also apply 'themes' to your system. Themes control the appearance of the Web logon page, headers, footers, color schemes, and terminology on your site's Web pages. When you are running Variable Data Print integrated with Storefront, you create themes on the Storefront server, and then share them with Variable Data Print to ensure that the same theme is used for a customer regardless of whether they are in an order or a project. For instructions, see *Applying Themes* on page 46.

When you create themes in Storefront, you can create multiple themes and assign them to different customers. This enables you to display different logon page images, page headers, footers, color schemes, and terminology for specific customers.

When you share a theme with Variable Data Print, only some of the components that you customize in the theme are applied to project pages, specifically header content, footer content, and a subset of the color scheme settings. The color scheme settings that are honored include the colors of the toolbar, tabs, and footer on project pages.

Applying the New Look

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
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.

Applying Themes

To create and modify themes, you must be assigned a Storefront system role that includes the Configure Brands user right.

1. Log on to your Storefront Web site as a site administrator (user name Administrator).
2. Click **Themes**.

3. Create, modify, and assign themes to specific customers as desired. For instructions, click the **Help** button (**?**) in the upper-right corner of the screen.

   Note: When modifying a theme's header in which you are referencing an image, you should copy the image file from the Storefront server to the corresponding location on the Variable Data Print server. This ensures that the project pages on which the header content is displayed can locate the image. (Alternatively, in the theme's header, you can specify an absolute path to the image, but the former method is recommended over the latter.)

4. To apply themes to Variable Data Print, restart the Variable Data Print server. This forces a database synchronization between the Storefront server and the Variable Data Print server, and resets the Variable Data Print themes cache.

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Backing Up the System

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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 50.)

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 51.

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.

When you are running Variable Data Print integrated with Storefront and Prinergy, you can use Prinergy Backup Manager to trigger Online Backup on the Variable Data Print server. To do so, you must add the Variable Data Print server to the list of servers on which backup will occur:

➢ In Prinergy Administrator, select **Tools** > **Configure System** > **Backup**. In the same dialog box, you can indicate whether you want to be notified on this server if there is a problem with the backup.

The next time Oracle backup successfully finishes on the Variable Data Print server, Online Backup on the server will be triggered automatically.

For more information about adding to or removing servers from the Prinergy Backup Manager list, see the Prinergy Administrator Help.

Setting Up Your Data Backup Process

As described in *Triggering the System Backup Process* on page 50, 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.

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Configuration Settings

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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 When running Variable Data Print integrated with Storefront, your Web site URL should be the Storefront logon page's URL. **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 14.
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 14.

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 14.

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 13.
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 36.

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.

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