

Creative Workflow and Asset Library 3.0.3 Integrated With Prepress Portal

System Administration Guide

English

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Who Should Use This Guide

This guide is intended for anyone who administers the Kodak® InSite™ Creative Workflow system and the Kodak InSite Asset Library software version 3.0.3. It explains how to use the administration software and points out procedures that are specific to your Creative Workflow and Asset Library system.

This guide applies to Creative Workflow and Asset Library 3.0.3 running in an integrated environment with the Kodak InSite 4.5 software or the Kodak InSite Prepress Portal 5.0 system.

Note: If you are running Kodak InSite Variable Data Print software in conjunction with Creative Workflow and Asset Library, this guide also applies to Variable Data Print. See Chapter 9, *Adding Variable Data Print*.

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

What Are Creative Workflow and Asset Library?

Creative Workflow provides a collaborative workspace where you and your team can manage and share *elements*—the individual images, pieces of artwork, and other files that make up a publication. In Creative Workflow, you organize elements into *projects*.

Asset Library is companion software to Creative Workflow that provides an environment where you can store elements that you may want to reuse in future publications. In Asset Library, you organize elements into *libraries*.

The Creative Workflow and Asset Library software runs on its own server, and multiple users can access it at once, either through a Web browser or through the Kodak InSite Desktop software that you install on your local workstation and use to access the server. When compared to a Web browser, Desktop provides additional features intended for advanced users. (For more information, see the *Creative Workflow and Asset Library 3.0 Quick Start Guide*.)

You can access Creative Workflow and Asset Library through a Web browser on a computer running either the Apple® Mac OS® X or Windows operating system.

You can install Desktop on either a Mac OS X platform or a Windows platform.

Creative Workflow and Asset Library Components

Creative Workflow and Asset Library consist of the following software and hardware components:

- Creative Workflow and Asset Library: the main software. This is what your customers and staff use.
- InSite Creative Administration: software for configuring and managing the system
- Desktop: a desktop client user interface for Creative Workflow, Asset Library, and Prepress Portal software.
- Creative Workflow/Asset Library server: the Web server on which the Creative Workflow and Asset Library software is installed

Web Browser Compatibility

Creative Workflow and Asset Library, 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 Creative Workflow and Asset Library, 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
Creative Workflow and Asset Library	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 Creative Workflow and Asset Library system might be set up as part of your network. Your users access Creative Workflow and Asset Library either through a Web browser or through Desktop. Users log on through your InSite 4.5 or Prepress Portal 5.0 server. If Creative Workflow or Asset Library user rights are enabled, users are directed to a new home page offering projects, jobs, and libraries.

The Creative Workflow/Asset Library server has its own Oracle® database. When you process a file through the Kodak Prinergy® system that contains an FPO (For Placement Only) image from Asset Library, Prinergy searches the Creative Workflow and Asset Library database to locate the high-resolution original of the image. When an Asset Library user searches in a library for an element based on job information, Asset Library queries the Prinergy server's database to return usage information.

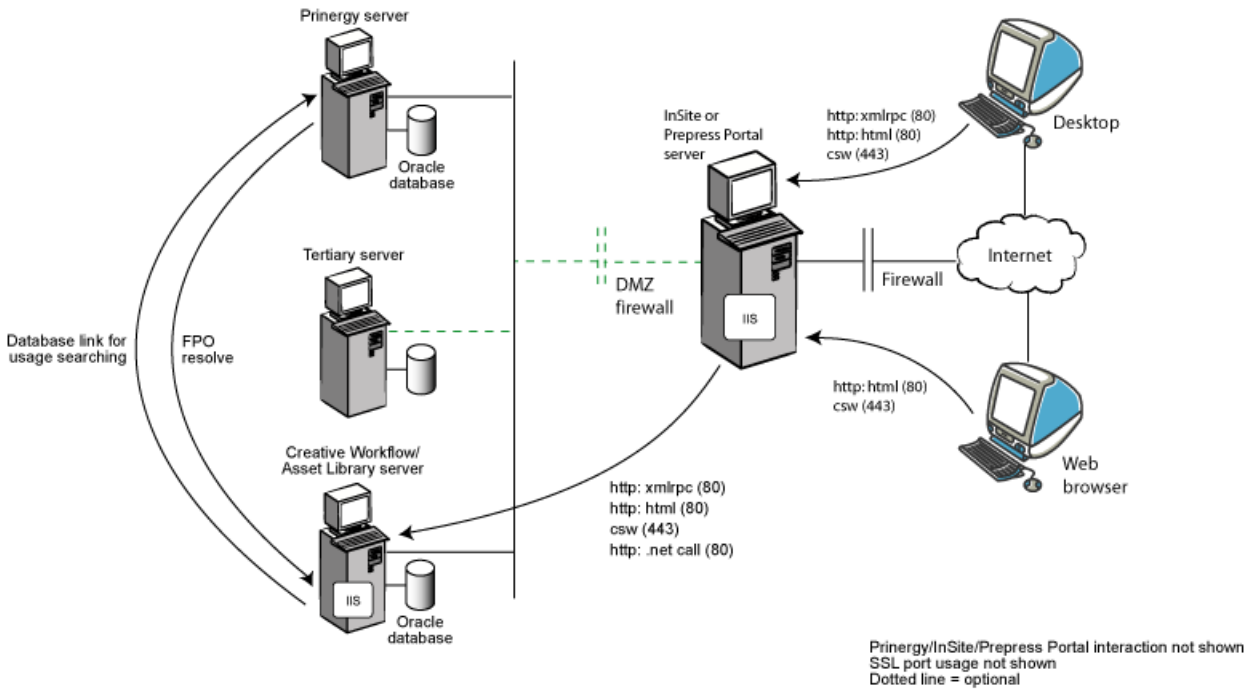


Figure 1: Creative Workflow and Asset Library system architecture

Security

Any necessary system security (such as firewalls and SSL certificates) should be implemented when Prepress Portal is installed, and you should not have to implement additional security when adding Creative Workflow and Asset Library. (For information about planning system security, see the *InSite System Administration Guide* if your system includes InSite 4.5, or the *Prepress Portal System Administration Guide* if your system includes Prepress Portal 5.0.)

However, you should consider enforcing the use of strong passwords to access your Creative Workflow/Asset Library server. You should also ensure that critical Windows updates are applied to the server, just as you apply critical updates to your Prepress Portal server.

Important: Although every effort has been made to ensure security within Creative Workflow and Asset Library, you are ultimately responsible for the security of any data transmitted via the Creative Workflow and Asset Library software.

About Strong Passwords

User access to Creative Workflow and Asset Library is password-controlled. A user's password allows them to access the projects and libraries for the customer to which they belong.

We recommend the use of strong passwords with Creative Workflow and Asset Library 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 Creative Workflow/Asset Library 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 Creative Workflow/Asset Library 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://<Creative Workflow 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

Creative Workflow and Asset Library use licensing to:

- Control the software features that you can access, such as tasks
- Enable Kodak Matchprint® Virtual technology, and manage the number of customers who have access to this feature
- 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 Creative Workflow and Asset Library 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 Creative Workflow/Asset Library server. This dongle is connected when the server is installed.)

You may want to view your Creative Workflow and Asset Library 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 Creative Workflow and Asset Library 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.

There is also an additional license key, called TwAm Processor, for the Creative Workflow and Asset Library processor. After this license key is entered during installation, you typically do not need to enter a new key. In the unlikely event that you do need to enter a new TwAm Processor license key (for example, because your key has expired), you can do so using License Manager.

To enter a new TwAm Processor license key:

➢ In License Manager, in the **TwAm Processor** area, click **Replace**. Enter the new license key, and click **Apply**.

Monitoring System Activity

Using InSite Creative Administration, you can track who is currently logged on to your Creative Workflow and Asset Library system. You might want to do this, for example, when you need to restart the system and 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 Creative Workflow/Asset Library 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 and libraries during the specified time period.

Restarting Creative Workflow and Asset Library

You can stop and restart the Creative Workflow/Asset Library service whenever required. To stop and restart, you must be on the Creative Workflow/Asset Library 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**.

   An e-mail message is automatically sent to all specified users, regardless of whether they are currently logged on.

To stop and restart the Creative Workflow/Asset Library 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 Creative Workflow/Asset Library 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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Configuring the System

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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
- Font checking
- Image rendering and caching
- Event notification and reporting
- Software updates
- Color management

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 information about configuring color management, see Chapter 7, *Setting Up Color Management*.)

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 Creative Workflow and Asset Library 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 Creative Workflow and Asset Library in conjunction with Prepress Portal, your Web site URL should be the Prepress Portal 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 43.
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. You can also specify different timeouts for users logged on through a Web browser versus users logged on through Desktop. The default setting in each case is 20 minutes. You might want to decrease the times, for example, to tighten your system security.

Note: Session timeout does not apply when Smart Review is in use. Users are not disconnected during an active session of Smart Review.

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 *who is logged on through a Web browser* 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 *who is logged on through a Web browser* will be disconnected.
4. In the **Desktop Application Session Timeout** box, specify the number of minutes after which the idle session of a customer or staff user *who is logged on through Desktop* will be disconnected. (You can specify only one timeout that applies to all users who are using Desktop.)
5. Click **Update** to save and apply the changes.

   Important: You must restart Creative Workflow and Asset Library for these changes to take effect.

Specifying JPEG Download Options

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

Note that when you specify available JPEG resolutions, these resolutions take effect only when you download elements from a Web browser. When you download elements from Desktop, the JPEG resolution options are fixed and you cannot modified them.

Alternatively, if desired, you can completely disable the option for users to download JPEG versions of elements from libraries. (This option applies only if your system includes Asset Library.) Again, this setting takes effect only for users who log on using a Web browser; you cannot disable JPEG download for Desktop users. When you disable the option for Web users, the **Download JPEG** button disappears from the Operations palette when users are in a library (although it is still available when users are in a project).

To specify JPEG resolution options:

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 they download JPEG versions of elements. Separate multiple values by semicolons—for example, `72;150;300`.
3. Click **Update** to save and apply the changes.

To disable download of JPEG files from libraries:

1. Click **Configuration Settings > Workflow**.
2. Clear the check box next to **Allow Download of LowRes JPEG Images from libraries**.
3. Click **Update** to save and apply the changes.

Specifying FPO Download Options

Note: This section applies only if your system includes Asset Library.

An FPO (For Placement Only) image—or proxy image—is a low-resolution version of a high-resolution original image. You can use an FPO image as a placeholder for a high-resolution image when you work on a layout (for example, in QuarkXPress® or Adobe® InDesign® software). The FPO file is smaller than its high-resolution original and therefore faster and easier to place into the layout, manipulate, and share.

When a user downloads an FPO version of an element from a library, a unique identification comment is automatically embedded in the FPO. This comment identifies the location of the high-resolution version of the element in the Creative Workflow and Asset Library database. Then when the layout in which the FPO is placed is sent for printing, your printer's workflow software recognizes the low-resolution FPO in the layout and automatically swaps it for the high-resolution image before output, using the FPO's embedded identification comment to locate the high-resolution version in the database.

You use InSite Creative Administration to configure how FPO files can be downloaded from libraries.

To configure FPO download options:

1. Click **Configuration Settings > Workflow**.
2. If you want any downloaded FPO file to contain a printable preview, select **Generate printable FPO previews**.

   A printable preview makes the FPO image visible when the layout in which the FPO is placed is printed—for example, to a laser printer.

   You may choose to clear this setting to make FPO files smaller. However, clearing this setting has some implications. For details, see the description of the **Generate printable FPO previews** setting in *Workflow* on page 99.
3. To specify the resolution of any printable preview contained in an FPO file, type the resolution in the **Resolution of printable FPO previews** box. The default resolution is 72 ppi.

4. To compress any printable preview contained in an FPO file, select **Generate compressed FPO previews**.

   Compressing the printable preview in a FPO file helps to offset the increased file size of the FPO due to including a printable preview in the file. This setting does not affect the resolution of the printable preview itself and the user should not see any difference in the preview.

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

For more information about these FPO settings, see the detailed description of each setting in *Workflow* on page 99.

Configuring Font Checking

Two **Configuration Settings > Workflow** settings enable you to specify how the system should check uploaded files for missing fonts and what it should do when fonts are missing.

Fail On Missing Fonts

When you select this option, files of any type *except* PDF are checked for missing fonts during upload processing. If an uploaded file is missing a font, the TwAm Processor, which processes uploaded files, checks the folder **<Data drive>\TWFonts** on the Creative Workflow/Asset Library server. If it finds the missing font in this folder, it embeds the font into the uploaded file. If it cannot find the missing font in the **TWFonts** folder, an error message appears indicating that the font was not found, and a large X appears on the element's thumbnail in the Elements view.

If this option is not selected, the TwAm Processor still identifies missing fonts in any uploaded files and tries to embed the missing fonts by looking in the **TWFonts** folder. If a missing font does not reside in the folder, a warning message appears indicating that the font was not found. However, upload processing continues and no X appears on the element's thumbnail.

This option applies to non-PDF file types only. To perform font checking on PDF files, you must select **Do Font Processing on PDFs**.

Do Font Processing on PDFs

When you select this option, the TwAm Processor checks uploaded PDF files for missing fonts.

If an uploaded PDF file is missing a font, and **Fail On Missing Fonts** is also selected, an error message appears indicating that the font was not found, and a large X appears on the element's thumbnail in the Elements view.

If an uploaded PDF file is missing a font, and **Fail on Missing Fonts** is *not* selected, a warning message appears indicating that the font was not found. However, upload processing continues and no X appears on the element's thumbnail.

When you clear **Do Font Processing on PDFs**, the TwAm Processor does not process uploaded PDF files. PDF files can still be uploaded, but they are not checked for missing fonts.

Note: Fonts cannot be embedded in PDF files at this time. Even if the TwAm Processor finds the missing font in the **TWFonts** folder, it cannot embed the font in the uploaded file.

TWFonts Folder

Ensure that you install all fonts in the **<Data drive>\TWFonts** folder on the Creative Workflow/Asset Library server.

When the TwAm Processor identifies a missing font in an uploaded file, it searches for the font in the **TWFonts** folder only. If it finds the missing font in the folder, it embeds the font in the uploaded file. If it cannot find the missing font in the folder, an error or warning message (depending on whether the **Fail On Missing Fonts** option is selected) appears, indicating that the missing font could not be found.

Important: Only Roman fonts can be placed in the **TWFonts** folder. Japanese and other Asian character sets cannot use the **TWFonts** folder. You must place any Japanese or other Asian character sets in **AraxiHome\TWAM\TwAmProcessor\static_data\common\Resource\Font**.

Configuring Image and Thumbnail Caching

Caching of element images affects how quickly a user can open elements in Smart Review and how quickly the images are refreshed when the user performs operations on them in Smart Review.

You can configure the system to pregenerate and cache a raster image (a .png file) and thumbnail of an element whenever an element is first uploaded. This will speed up the display of the element in a project or library, and the initial display of the element in Smart Review.

However, uploading the element will take longer, and more disk space is required on the Creative Workflow/Asset Library server. You may choose not to pregenerate raster images or thumbnails if upload speed is a concern, disk space is limited, or you don't expect your users to view elements in Smart Review frequently. Alternatively, you may choose to create thumbnails of elements on upload, but not raster images.

You control how element images and 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 102.

Changing File Delete Times

When a user deletes an element from a project or library, or deletes a whole project or library, it automatically disappears from the user's view. However, the files remain on the Creative Workflow/Asset Library 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 or libraries at one time.
- If a user accidentally deletes an element, project, or library, 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 Creative Workflow and Asset Library 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 p.m 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 upload elements, download elements, and move, copy, and rename elements in a project.

role: a collection of user rights

In Creative Workflow and Asset Library, 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 and libraries that you can see and the actions you can perform—depends on the roles that you are assigned.

There are three types of roles—system/customer, project, and library:

- 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 be assigned tasks in projects. Project roles are applicable only if your system includes Creative Workflow.
- Library roles determine your ability to create and delete libraries, manage other users' access to libraries, and work with elements in libraries. Library roles are applicable only if your system includes Asset Library.

There are also three levels (or access points) at which these roles can be assigned to users: site level, customer level, and project and library 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 or library level*, the user can take action as permitted by the rights included in that role only within the specific project or library 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 39.

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 or libraries created specifically for that customer).

When running Creative Workflow and Asset Library 3.0.3 integrated with InSite 4.5 or Prepress Portal (formerly InSite) 5.0, only staff users can be assigned roles at the site level, whereas only customer users can be assigned roles at the customer and project and library levels. However, in Prepress Portal 5.0, you can restrict staff users to have access only to specific customers.

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/Library Level To
System/customer	Integrated with InSite 4.5: System roles assigned to staff users at the site level have no effect. System-level administration abilities are defined by the Create and Delete Customers and Edit Customer Info job rights. Integrated with Prepress Portal 5.0: 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 and library access for other staff users at the site level, and to manage project and library access for customer users at the customer level for any customer to which they have access.	Integrated with InSite 4.5: System/customer roles cannot be assigned at the customer level. Integrated with Prepress Portal 5.0: 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 and library access at the customer level for other users in their organization.	Cannot be assigned
Project	Staff users	Customer users	Customer users*
Library	Staff users	Customer users	Customer users*

* Although this is generally true, when integrated with InSite 4.5, staff users *can* be assigned project and library roles specifically at the project and library level. However, to assign roles to staff users at the project and library level, you must be assigned a system role at the site level that includes the Manage Access user right. In this case, when you manage access for a specific project or library, the users that

you see include all customer users for the current customer as well as all staff users in your system. If you are assigned a system role that does *not* include the Manage Access right, or you are not assigned a system role at all, you still see all of the customer's users in the list, but no staff users.

You create all system/customer, project, and library roles in InSite Creative Administration. (See *Creating Roles* on page 22.) When integrated with InSite 4.5, you create staff user accounts and assign job rights to staff users in InSite Administration, and then assign project and library roles to those staff users in InSite Creative Administration. When integrated with Prepress Portal 5.0, you perform all staff user account creation and role assignment in Prepress Portal. See *Assigning Roles to Typical Staff Users* on page 30.

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

To create customer users and assign roles to them, you use InSite or Prepress Portal. This is discussed in more detail in *Assigning Roles to Typical Customer Users* on page 35.

Important: You can create customer users and assign roles to users at the customer level in a Web browser only; you cannot do this in Desktop. Although it is possible to assign roles at the project and library level in either a Web browser or Desktop, all instructions in this chapter apply when you are in a Web browser only.

Creating Roles

When Creative Workflow and Asset Library 3.0.3 is installed (or upgraded from a previous version), several roles are automatically created by default. (For a description of each of these roles, see *Default Roles* on page 28.) 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 30. If you need to create additional roles to meet your needs, perform the following steps to create each role. You create all system/customer, project, and library roles in InSite Creative Administration.

To create a role:

1. In InSite Creative Administration, click **Role Manager**.
2. Click **System/Customer**, **Project**, or **Library** 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 24.)
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 will need, you can assign roles. For details, see *Assigning Roles to Typical Staff Users* on page 30 and *Assigning Roles to Typical Customer Users* on page 35.

To delete a role:

1. In InSite Creative Administration, click **Role Manager**.
2. Click **System/Customer**, **Project**, or **Library**, 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**, **Project**, or **Library**, 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 and library 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 they were explicitly given access.

Table 3 describes each system/customer, project, and library 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, project, or library level.

Note: If you are running the Variable Data Print software in conjunction with Creative Workflow and Asset Library, two additional project user rights are available that are not listed in Table 3. For details, see *Assigning Variable Data Print User Rights* on page 91.

Table 3: System/customer, project, and library rights

Right	Site Level	Customer Level	Project/Library Level
System/Customer Rights			
Manage Access	Integrated with Insite 4.5: This right has no effect. Integrated with Prepress Portal 5.0: Assign customer, project, and library roles to staff users at the site level, and to customer users at the customer level for any customer	Integrated with InSite 4.5: This right has no effect. Integrated with Prepress Portal 5.0: Assign customer, project, and library roles to users at the customer level	N/A (System/customer roles cannot be assigned at the project or library level.)
Create Customer	This right has no effect.	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 or library level.)
Modify Customer	This right has no effect.	This right has no effect.	N/A (System/customer roles cannot be assigned at the project or library level.)
Delete Customer	This right has no effect.	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 or library 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, create auto tasks, 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. To see the **Create Auto Task** button, the user must have the Create Tasks 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 Each project role must include either the View Elements Tab right or the View My Tasks right (or both). If the role does not include the View Elements Tab right, it must include the View My Tasks right. In this case, the user can see the Tasks view of a project, but not the Elements or Uploads views. When you create a new role, this right is automatically selected. If you do not want to include this right in the role, you must select the View My Tasks right before you can clear the View Elements Tab right.		
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; assign source profiles to elements 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.		

Right	Site Level	Customer Level	Project/Library Level
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.		
View My Tasks	Be assigned review tasks, and see all tasks assigned to the user in the Tasks view of a project and in Smart Review Each project role must include either the View Elements Tab right or the View My Tasks right (or both). If the role does not include the View My Tasks right, it must include the View Elements Tab right. In this case, the user can see the Elements and Uploads views of a project, but not the Tasks view.		
View All Tasks	See all tasks assigned to the user *or* to other users in the Tasks view of a project and in Smart Review The View My Tasks right must be selected for this right to be available.		
Approve Tasks	Be assigned approval tasks The View My Tasks right must be selected for this right to be available.		
Use Matchprint Virtual	Be assigned color approval tasks that require the user to monitor-proof elements for color accuracy in Smart Review using Matchprint Virtual technology Both the View My Tasks and Approve Tasks rights must be selected for this right to be available.		
View All Annotations & Status	See the annotations that other users added to elements in Smart Review, and see the status of each annotation If the role does not include this right, the user can see their own annotations only, and they cannot see the status of any annotation. The View My Tasks right must be selected for this right to be available.		
View Correction Reports	View a report summarizing all of an element's annotations that were added in Smart Review and associated with a particular task The View My Tasks right must be selected for this right to be available.		
Create Tasks	Create review, approval, or color approval tasks in a project and assign them to other users that have access to that project Both the View Elements Tab and View My Tasks rights must be selected for this right to be available. The View Elements Tab right is required because tasks can be created in the Elements view only. This right also enables the user to create auto tasks in a project. However, to access the **Create Auto Task** button in the Project Administration view, the user must also have the Modify Project right.		

Right	Site Level	Customer Level	Project/Library Level
Modify Tasks	Add elements to an existing task or remove elements from a task, add users to an existing task or remove users from a task, rename a task, change a task's due date, and change a task's password authentication (Desktop only) The View My Tasks right must be selected for this right to be available.		
Delete Tasks	Delete tasks (Desktop only) The View My Tasks right must be selected for this right to be available.		
Task Status View	In the Tasks view for a project, see the overall status of each task, as well as the individual users assigned to each task and their status per task element (Desktop only) The View My Tasks right must be selected for this right to be available. **Note:** When you select the Task Status View right, the View All Annotations & Status right is also automatically selected (if it wasn't already selected). However, you can clear the View All Annotations & Status right if desired; it is not required for the Task Status View right to be available.		
Admin Tasks	Send a task reminder to users who have not yet set their status for a task, reset a user's task status, set the final status for tasks, and inactivate tasks or reactivate inactive tasks (Desktop only) Set the approval status for annotations in Smart Review Both the View My Tasks and Task Status View rights must be selected for this right to be available.		
Library Rights			
Manage Access	Within any library to which the user has access, assign library roles to customer users at the library level		
Create Library	Create new libraries for any customer	Create new libraries for the customer for whom the user has been assigned a library role	N/A (You cannot create new libraries for any customer if you are assigned a library role only for a specific library.)
Modify Library	This right is not yet functional.		
Delete Library	Delete libraries for any customer	Delete libraries for the customer for whom the user has been assigned a library role	N/A (You cannot delete libraries for any customer if you are assigned a library role only for a specific library.)
Upload	Upload elements to a library		
Arrange/Modify	Move, copy, and rename elements and folders, and create folders, in a library		
Download Originals	Download high-resolution original versions of elements from a library		
Download FPO	Download low-resolution For Placement Only versions of elements from a library		

Right	Site Level	Customer Level	Project/Library Level
Download JPEG	Download low-resolution JPEG versions of elements from a library		
Delete	Delete elements and folders from a library		

Default Roles

When Creative Workflow and Asset Library is installed (or upgraded from a previous version), several roles are automatically created by default. (You can create additional roles as needed, as described in *Creating Roles* on page 22.) Tables 4 to 6 list the default system/customer, project, and library roles that are created and the rights that are automatically selected for each role.

Table 4: Default system/customer roles

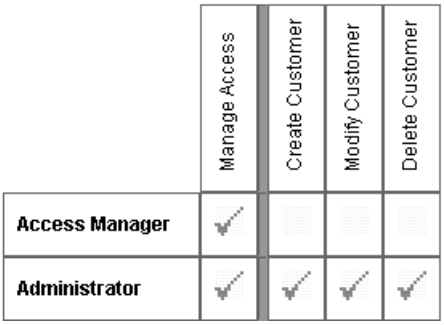


Table 5: Default project roles

	Manage Access	Create Project	Modify Project	Delete Project	View Elements Tab	Upload	Arrange / Modify	Download Originals	Download JPEG	Delete	View My Tasks	View All Tasks	Approve Tasks	Use Matchprint Virtual	View All Annotations & Status	View Correction Reports	Create Tasks	Modify Tasks	Delete Tasks	Admin View Tasks	Admin Tasks
Access Manager	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓		✓					
Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Content Manager		✓	✓	✓	✓	✓	✓	✓	✓	✓											
Content Reader					✓			✓	✓												
Task Administrator		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Task Approver											✓	✓	✓								
Task Approver MV											✓	✓	✓	✓							
Task Manager		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓		
Task Reviewer											✓	✓									

Table 6: Default library roles

	Manage Access	Create Library	Modify Library	Delete Library	Upload	Arrange / Modify	Download Originals	Download FPO	Download JPEG	Delete
Access Manager	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Content Manager		✓	✓	✓	✓	✓	✓	✓	✓	✓
Content Reader							✓	✓	✓	

Assigning Roles to Your Site Administrator

When you install a new Prepress Portal 5.0 system, or upgrade to Prepress Portal 5.0 from InSite 4.5, a site administrator account called Administrator is automatically created in Prepress Portal. This user account is automatically assigned Prepress Portal 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 and library roles. You must manually assign these roles to the site administrator in order for the site administrator to have the ability to manage project and library access for other staff and customer users.

If you are running InSite 4.5, you can skip this section.

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
2. Click **Staff Users**, and click the name of the site administrator.
3. Assign the site administrator an Administrator system role, Administrator project role, and Administrator library 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 need to be able to 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 7 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 7: 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, jobs, and libraries 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 and libraries at the project and library level (that is, enable customer users to access only specific projects and libraries)	*Full-Access Staff User* on page 32
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 and libraries at the project and library level for the customers to which they have access	*Limited-Access Staff User* on page 32
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, jobs, and libraries for each of those customers	*Multi-Customer User* on page 33

Full-Access Staff User

Integrated With InSite 4.5

1. In InSite Administration, create a staff user account and assign the user all job rights. (For instructions, see your *InSite System Administration Guide*.)
2. In InSite Creative Administration, click **Staff Users** and select the staff user that you created in step 1.
3. In the **User Rights** area, select the Administrator system role, Administrator project role, and Administrator library role. These are default roles that have all rights selected for each role (see *Default Roles* on page 28).

Integrated With Prepress Portal 5.0:

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

Limited-Access Staff User

Integrated With InSite 4.5:

You cannot create a limited-access staff user when running Creative Workflow and Asset Library 3.0.3 integrated with InSite 4.5.

Integrated With Prepress Portal 5.0:

1. Log on to Prepress Portal 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 Prepress Portal admin and job roles for each customer as desired. (For instructions, see the Prepress Portal Help.)
4. Click **Manage Project & Library Access**.
5. In the Managing User Access at Site view, assign the staff user the Administrator customer role, Administrator project role, and Administrator library role. This will enable the staff user to manage project and library 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.

Integrated With InSite 4.5:

1. Log on to InSite as a staff user.
2. In the Customers view, click **Multi-Customer Users > Add New User**.
3. Specify the user's logon user name, password, display name, and other contact information, and click **Add User**.
4. If an error message appears, indicating that user rights for projects and libraries were not updated but that job rights were successfully updated, click **OK**. This error message has no effect.
5. Add access to specific customers for this user. The procedure varies depending on whether you are creating the user for the first time or the user already has an account with a customer and you want to make the user a multi-customer user.

   If the user does not yet have an account with a customer:

   a. In the **Customers** area, click **Add Customers**.

   b. Consider all of the customers to which you want to give this user access. Select all of the customers for which you want to give the user the *same* job rights.

   c. On the **Jobs** tab, select the job rights that you want to give the user for the selected customers. Click **OK**.

      All of the customers that you selected are now listed in the Edit User Information view for the user.

   d. Click the first customer name.

   e. On the **Projects** and **Libraries** tabs, assign to the user the project and library roles that contain the rights that you want to give the user for each of the customer's projects and libraries. (On the **Jobs** tab, you can also modify the job rights that the user has for this particular customer's jobs.)

   f. Click **Update**.

   g. Repeat steps b to f for each customer for which you want to give the user a unique set of job rights. (You can assign different job rights to the user for each customer.)

If the user already has an account with a customer:

a. In the **Customers** area, click **Add Existing Account**.

b. Type the user name of the user that you want to add as a multi-customer user, type *your* password, and click **OK**.

c. The name of the customer for which the user already has an account appears in the **Customers** area.

d. If desired, on the **Jobs** tab, modify the user's job rights.

e. On the **Projects** and **Libraries** tabs, assign to the user the project and library roles that contain the rights that you want to give the user for each of the current customer's projects and libraries.

f. Click **Update**.

g. Add any other customers to which you want to give the user access. Click **Add Customers** and follow the previous procedure (*If the user does not yet have an account with a customer:* on page 33).

6. When you are finished specifying all customers to which the user will have access, in the Edit User Information view, click **Update**.

7. When prompted to confirm that you want to propagate the changes to the customer accounts, click **OK**.

8. If another error message appears, indicating that user rights for projects and libraries failed to update but that job rights were successfully updated, click **OK**. This error message has no effect

Note: If you create a multi-customer user by taking a user who already had an account with a customer and giving them access to additional customers, when the user logs in with their new user name and password they will see all of the customers to which they have access. However, if the user logs in with the user name and password that they were previously given for their preexisting user account, they will see only the projects, jobs, and libraries for the customer to which they were previously assigned. Therefore, you should advise multi-customer users to log on with their new user names and passwords.

Integrated With Prepress Portal 5.0:

1. Log on to Prepress Portal as the site administrator or as another staff user with the ability to manage project and library 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 Prepress Portal 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 and library roles for the current customer. This determines the user's ability to work in any of the customer's projects and libraries.

   Assuming that you do not want this user to be able to manage project and library 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 to 7, to assign project and library roles to the user for this customer.
10. Repeat the procedure until project and library 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 created in InSite Creative Administration.

Table 8 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 7 are not included in this document; they can be found in the Creative Workflow and Asset Library Help.

Table 8: Types of customer users

User	Must Be Created By	Can	To Create, See
Customer administrator	Site administrator or staff user	• See all projects, jobs, and libraries 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 and libraries at the project and library level	*Customer Administrator* on page 37
Full-access customer user	Customer administrator	• See all projects, jobs, and libraries for their company • Manage access at the project and library level for specific projects and libraries, *if* their project or library role includes the Manage Access user right	Creative Workflow and Asset Library Help
Limited-access customer user that can see only the projects and libraries they create themselves	Customer administrator	• See only the projects and libraries that they create (may also be able to see all or only specific jobs, depending on their job rights) • Manage access for the projects and libraries that they create, *if* their project or library role includes the Manage Access user right	Creative Workflow and Asset Library Help
Limited-access customer user that can see only specific projects and libraries	Customer administrator	• See only the projects and libraries to which they have been given access (may also be able to see all or only specific jobs, depending on their job rights) • Manage access for the projects and libraries that they can see, *if* their project or library role includes the Manage Access user right	Creative Workflow and Asset Library Help

Customer Administrator

Integrated With InSite 4.5:

1. Log on to InSite with a staff user account that has the Edit Customer Info job right.
2. Under the name of the customer for whom you want to create the user, click **Edit Customer Info**, and click **Add New User**.
3. Specify the user's logon user name, password, display name, and other contact information.
4. On the **Jobs** tab, select all job rights.
5. On the **Projects** and **Libraries** tabs, select the Administrator project and library roles. These are default roles that have all rights selected for each role (see *Default Roles* on page 28).
6. Click **Add User**.

Integrated With Prepress Portal 5.0:

1. Log on to Prepress Portal as the site administrator or as another staff user with the ability to manage project and library 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 Prepress Portal admin and job roles as desired. (For instructions, see the Prepress Portal 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, Administrator project role, and Administrator library role.
6. Click **Update**.

Typical Users In a Sample System

Table 9 lists the typical types of users as described in *Assigning Roles to Typical Staff Users* on page 30 and *Assigning Roles to Typical Customer Users* on page 35, 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. (The same principles would apply if each customer also had a number of libraries.)

Table 9: 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 (available only when running Creative Workflow and Asset Library in a stand-alone environment or integrated with Prepress Portal 5.0)	✓	✓	✓	✓	✓	✓			
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 28.)

Likewise, you can assign different roles to a user for each project or library 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.

  For example, suppose that you have been assigned a project role at the project level for a specific project. The role includes the Manage Access, View Elements Tab, Upload, Arrange/Modify, and Delete project rights, but no task rights. Now you want to assign a project role to another user for this particular project. When you view the list of project roles available for selection, you can see any roles that contain the same rights or a subset of the rights that you have been assigned. However, you would not see the Task Manager project role, for example, because that role includes task-related project rights that you have not been assigned for this particular project.

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 or library without having to log on to the system. Examples of tracked events include projects created, elements uploaded, tasks created, and status set on tasks.

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 or library 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 Task Created event type for that role, any user assigned the role will receive notification whenever a new task is created in a project to which they have access. (For a description of each available event type, see *Event Type Descriptions* on page 45.)

The event types that you can select for a role depend on the user rights selected for the role. For example, the Task Administration Changed event type is available only when the Task Status View project user right is included in the role.

Only project and library 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 44.

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 and library 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 44.

Each notification message contains a link to the revelant project, library, or task in a Web browser and in Desktop.

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 Creative Workflow/Asset Library server's SMTP e-mail server is set up:
   a. On the Creative Workflow/Asset Library 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 and Desktop 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 42, notification messages can be sent either as individual e-mail messages as events occur, or 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**.

   Click **Project** or **Library**, depending on whether you want to configure notifications settings for a project role or a library role.
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 42.)

   For a new role, no event types are selected by default. If your system was updated from Creative Workflow and Asset Library 2.1 to 3.0.3, your roles are automatically updated; the task-related event types are automatically selected for any existing project roles that include task user rights. However, you can clear or modify the default selections, for example, to change the notification format for an event type or to change the **Filter** setting.
4. For each task-related event (available only when configuring the notification settings for a project role), in the drop-down list in the **Filter** column, select **mine** if you want a user assigned the role to receive notifications only when the event is associated with a task the user is assigned. Select **all** if you want a user who is assigned the role to receive notifications when the event is associated with any task, regardless of whether the user is assigned that task.

When the **Filter** column is set to **mine** for a task event type, a user assigned the role will receive notifications about tasks they create only if they also assigned the task to themselves. If you want the user to receive notifications about tasks that they create but do not assign to themselves, you must select **all** in the **Filter** column.

As well, the settings in the **Filter** column are available only when the role includes both the View My Tasks and View All Tasks project user rights. If only View My Tasks is included in the role, the selection in the **Filter** column is automatically set to **mine** and you cannot change it. This is because a user assigned this role can see only tasks assigned to them, and therefore should not receive event notifications about tasks that they cannot see.

5. Click **Update**.

Viewing and Overriding Notification Settings

When you view a staff user's account in InSite Creative Administration (when integrated with InSite 4.5) or in Prepress Portal (when integrated with Prepress Portal 5.0), you can see the project and library roles assigned to the user at the site level, but you cannot view or override the notification settings associated with those roles. 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 Creative Workflow and Asset Library only, and through a Web browser only (not through Desktop).

For instructions on viewing and overriding notification settings, see the Creative Workflow and Asset Library Help.

Event Type Descriptions

Table 10 describes each event type that you can select when you configure the notification settings for a project role. Table 11 describes each event type that can be selected when you configure the notification settings for a library role.

The event types that are visible for a role depend on the user rights selected for the role. For example, the Task Administration Changed event type is available only when the Task Status View project user right is included in the role.

Table 10: 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, or a source profile was assigned to the element.
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.
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.

Event Type	Description
Container Events	A project was created or deleted.
Task Created	A task was created.
Task Deleted	A task was deleted.
Elements Added to Task	Elements were added to an existing task.
Elements Deleted from Task	Elements were removed from a task.
Task Administration Changed	Final status was set for a task, a task was inactivated, or an inactive task was reactivated.
Task Attribute Changed	A task's description, due date, or name was edited.
Task Status Changed	A user assigned a task has set their status for the whole task or an element associated with the task.
Annotation Events	A user has added an annotation to an element in Smart Review, modified an annotation, deleted an annotation, or set the approval status for an annotation.

Table 11: Library event types

Event Type	Description
Element/Revision Created	An element or revision of an element was created in a library as a result of an upload or copy.
Element/Revision Deleted	An element or revision of an element was deleted from a library.
Element Changed	An element in a library was renamed or moved, or a source profile was assigned to the element.
Folder Events	A folder was created, renamed, moved, or deleted.

Event Type	Description
Elements Uploaded	An upload to a library 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 library, 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 library), and an Element/Revision Created event for each element contained in the uploaded folder.
Elements Downloaded	A download from a library was initiated.
Elements/Folders Copied	A copy of an element or folder in a library 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 library was created or deleted.

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 or libraries. 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 or libraries for a single customer only, or specific activities in all projects or libraries for all customers. For instructions, see *Generating an Event Report* on page 49.

Customer users can also generate reports for their own projects and libraries through Creative Workflow and Asset Library, in a Web browser only. For instructions, see the Creative Workflow and Asset Library 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 or library activity that customer only, or select **All** to view project or library 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 or library whose activity you want to view. Alternatively, you can select **All** to run the report on all of the customer's projects and libraries, **All Projects** to run the report on all of the customer's projects only, or **All Libraries** to run the report on all of the customer's libraries only.
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 12 describes the types of activities that are included in the report when you select a given event type.

Table 12: Report event types

Report Event Type	Activities Included
Customers, Projects, Libraries	Projects or libraries 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, or source profiles assigned to elements ▪ Folders created, renamed, moved, or deleted
Uploads	Uploads initiated
Downloads	Downloads initiated
Copies	Copies of elements or folders initiated
Tasks (applicable only when generating reports for projects)	▪ Tasks created ▪ Tasks deleted ▪ Elements added to existing tasks ▪ Elements removed from tasks ▪ Final status set for tasks ▪ Tasks inactivated and inactive tasks reactivated ▪ Task descriptions, due dates, or names edited ▪ Users assigned tasks set their status for tasks or elements associated with tasks
Annotations (applicable only when generating reports for projects)	▪ Annotations added to elements in Smart Review ▪ Annotations modified ▪ Annotations deleted ▪ Approval status set for annotations

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 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 or library-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 Creative Workflow/Asset Library server in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en.** Table 13 lists the stylesheets in this folder that apply to Creative Workflow and Asset Library.

Note: The stylesheets marked with an asterisk are duplicated on the InSite/Prepress Portal server in **<Data drive>\inetpub\wwwroot\PrinergyWebRoot\RUser\custom\emailTemplates\en**. You should modify these stylesheets on the InSite/Prepress Portal server first, and then copy the modified **.xsl** files to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en** on the Creative Workflow/Asset Library server. This ensures that the files remain in sync across the servers.

Table 13: System message stylesheets for customer users

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

Stylesheets	Purpose
*ModifiedUser_Body.xsl	Message sent to a user when their account is modified The message includes an explanation of the changes made to the user's account.
*ModifiedUser_Subject.xsl	Subject line included in the message based on ModifiedUser_Body.xsl
TaskReminder_Body.xsl	Message sent to any users assigned a task who have not yet set their task status (when a user selects **Send Task Reminder** in Desktop) **Note:** This stylesheet controls only the overall format of the message, and the links at the bottom of the message to open the task in a Web browser or in Desktop. The body of the message is controlled by Desktop, and can be modified by a user on a per-message basis whenever the user selects **Send Task Reminder** in Desktop. You cannot modify the default message by editing TaskReminder_Body.xsl.
TaskReminder_Subject.xsl	Subject line included in the message based on TaskReminder_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 Creative Workflow/Asset Library server in **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\emailTemplates\en\CSR.** Table 14 lists the stylesheets in this folder that apply to Creative Workflow and Asset Library.

Table 14: 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

Stylesheet	Purpose
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 or library 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 Creative Workflow/Asset Library 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 or Desktop, 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 Creative Workflow/Asset Library 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 Creative Workflow/Asset Library 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 Creative Workflow and Asset Library 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 InSite/Prepress Portal, but not by Creative Workflow and Asset Library, any e-mail messages from Creative Workflow and Asset Library 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 Creative Workflow and Asset Library support:

- 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 Creative Workflow/Asset Library server. Any changes to event notification take effect only after the system is restarted.

6

Customizing the User Interface

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Overview

How you customize your Web pages and InSite Desktop depends on whether you are running Creative Workflow and Asset Library 3.0.3 integrated with InSite 4.5 or integrated with Prepress Portal (formerly InSite) 5.0.

If you are running Creative Workflow and Asset Library 3.0.3 integrated with InSite 4.5, see *Customizing the Interface in an InSite 4.5 System* on page 58.

If you are running Creative Workflow and Asset Library 3.0.3 integrated with Prepress Portal 5.0, see *Customizing the Interface in a Prepress Portal 5.0 System* on page 66.

Customizing the Interface in an InSite 4.5 System

When running Creative Workflow and Asset Library 3.0.3 integrated with InSite 4.5, you can customize some of the features that users see. Table 15 describes the features that you can customize, whether the customization procedure must be performed on the InSite server, the Creative Workflow/Asset Library server, or both, and the level of difficulty of each procedure.

Table 15: Customizable features

To Customize	Requires Setup on InSite Server	Requires Setup on Creative Workflow/Asset Library Server	Level of Difficulty
The Web logon page to display your company branding	Yes	No	Moderate; requires some knowledge of HTML
Web page headers and footers to display your company branding	Yes	Yes	Moderate; requires some knowledge of HTML
Web page headers and footers to display your customers' branding	Yes	Yes	Moderate; requires some knowledge of HTML
Desktop to display your company logo	Yes	No	Easy; requires ability to create graphics in .png format
Desktop to display your customers' logos	Yes	No	Easy; requires ability to create graphics in .png format

Customizing the Web Interface Logon Page, Headers, and Footers

You can customize the logon page, headers, and footers that users see in the Web interface, to reflect your company's branding (for example, your company's logo and contact information).

Alternatively, you can customize the headers and footers with different logos and information for each customer, enabling your customers to see their own company branding after they log on.

You can customize the logon page with your company branding only; you cannot customize it with your customers' branding.

The following procedure outlines the steps that you must take to customize the Web logon page, headers, or footers with either your company branding or a customer's branding. Because you are running Creative Workflow and Asset Library in conjunction with InSite 4.5, you should first create the necessary customization files on the InSite server, and then copy them to the Creative Workflow/Asset Library server. Table 16 lists the specific customization file that you must create on the InSite server in each scenario, and the location to which you must copy each file on the Creative Workflow/Asset Library server.

Note: When you customize the Web logon page, only the large image in the center of the window is modified. To customize the logon page's header and footer with your company branding, complete the steps to customize the header and footer.

1. Create and edit the customization file on the InSite server.

   For instructions, see *Customizing the InSite Interface* in the InSite Administration Help.

2. Copy the customization file and any images (for example, company logos) referenced in the file from the InSite server to the Creative Workflow/Asset Library server.

3. In a text editor, modify the customization file on the Creative Workflow/Asset Library server by searching for the word `PrinergyWeb` and replacing it with `TwAmWeb`.

   This ensures that the customization file is referencing the image files on the Creative Workflow/Asset Library server rather than on the InSite server.

4. Save and close the customization file.

Table 16: Customization files and where to copy them

To Customize	Create and Edit This File on the InSite Server	Copy File and Images to This Folder on the Creative Workflow/Asset Library Server
The logon page to display your company branding in the center of the window	You customize the logon page by creating and editing a customization file on the InSite server only; you do not need to copy the file or its referenced images to the Creative Workflow/Asset Library server. For instructions, see *Customizing the InSite Interface* in the InSite Administration Help.	
The header to display your company branding	CustomizedHeaderContent.html	<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\header
The footer to display your company branding	CustomFooter.html	<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\footer
The header to display a customer's branding	CustomizedHeaderContent.html	The customer's **header** folder For instructions on opening this folder, see *Selecting a Customer to Customize Their Header or Footer*.
The footer to display a customer's branding	CustomFooter.html	The customer's **footer** folder For instructions on opening this folder, see *Selecting a Customer to Customize Their Header or Footer*.

Selecting a Customer to Customize Their Header or Footer

1. On the Creative Workflow/Asset Library server, start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
2. Click **Customization**.
3. In the **Customer-Specific Customization** area, verify whether the customer for whom you want to apply the header or footer is already listed.

   If the customer is already listed, click **Browse** next to their name.

   If the customer is not listed, click **Select Another Customer**. Select the desired customer, and click **Choose**. When the customer name appears in the **Customer-Specific Customization** area, click **Browse** next to the name.
4. Open the folder into which you want to copy the customization file and image files (for example, the **header** or **footer** folder), as specified in Table 16.

Customizing the Logon Page

Note: When you customize the Web logon page, only the large image in the center of the window is modified. To customize the logon page's header and footer with your company's branding, see *Customizing Headers* on page 61 and *Customizing Footers* on page 64.

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
2. Click **Customization**.
3. In the **Printer Customization** area, click **Browse**.
4. Open the **login** folder.
5. Make a copy of the file **CustomLoginContentTemplate.html** and rename it **CustomLoginContent.html**. Save it in the **login** folder.
6. Copy into the **login** folder any image that you want to appear on the logon page.

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

   You can increase your formatting options by adding table cells or rows, or new tables. Be aware that tables may be displayed inconsistently across different browsers.
8. After the tag `<!--Insert Content Here-->`, type the HTML required to display your logon page content, such as text or images.

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

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

   Any image that you want to reference must exist in the **login** folder. Ensure that you reference the image's absolute path; otherwise, the image may not appear.
9. Save your changes and close the file.

Customizing Headers

You can customize the Web page header to reflect your company's branding, or you can customize a different header for each customer, to reflect their own branding.

To customize the header with your company's branding:

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
2. Click **Customization**.
3. In the **Printer Customization** area, click **Browse**.
4. Open the **header** folder.

5. Make a copy of **CustomizedHeaderContent.html**, and save it to the **header** folder as **CustomizedHeaderContentOriginal.html**. Ensure that you do not use **CustomizedHeaderContentTemplate.html**.
6. Copy any images that you want to use in the header to the **header** folder. Images must be GIF or JPEG files.

   You can customize three parts of the header—the background, logo, and banner—so you may have multiple images that you want to use.
7. In a text editor, open **CustomizedHeaderContent.html**.
8. Replace the names of the image files with the ones that you copied to the **header** folder. Table 17 describes how to modify the header to display custom background, logo, and banner images.

Table 17: Customizing the header with your company's branding

To Customize	Change the Line	To
The background image in the header (for example, with an image called **MyBackground.jpg**)	In the `<!--Header Background Div -->` section, change `/TwAmWeb/rto/Creo/en/images/NAVI_NavigationImages/NAVI_background.jpg`	`/TwAmWeb/custom/header/MyBackground.jpg`
The logo image in the header (for example, with an image called **MyLogo.gif**)	In the `<!--Header Custom Logo Div -->` section, change `<IMG SRC="/TwAmWeb/rto/Creo/common/images/DefaultLogo.gif"`	`<IMG SRC="/TwAmWeb/custom/header/MyLogo.gif”`
The banner image in the header (for example, with an image called **MyBanner.jpg**)	In the `<!--Header Custom Banner Div -->` section, change `<IMG SRC="/TwAmWeb/custom/header/SampleBanner.jpg"`	`<IMG SRC="/TwAmWeb/custom/header/MyBanner.jpg"`

   Any image that you want to reference must reside in the **header** folder. Ensure that you reference the image's absolute path; otherwise, the image may not appear.
9. Save your changes and close the file.

To customize the header with a customer's branding:

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
2. Click **Customization**.
3. In the **Printer Customization** area, click **Browse**.
4. Open the **header** folder and copy **CustomizedHeaderContent.html** to the desktop. You will later use this file to customize the header for a specific customer. (Ensure that you do not use **CustomizedHeaderContentTemplate.html**.) Close the file browser window.

5. In the **Customer-Specific Customization** area, verify whether the customer for whom you want to apply the header is already listed.

   If the customer is already listed, click **Browse** next to their name.

   If the customer is not listed, click **Select Another Customer**. Select the desired customer, and click **Choose**. When the customer name appears in the **Customer-Specific Customization** area, click **Browse** next to the name.

6. Open the **header** folder and paste the copy of **CustomizedHeaderContent.html** that you created on the desktop in step 4.

7. Copy any images that you want to use in the header to the **header** folder. Images must be GIF or JPEG files.

   You can customize three parts of the header—the background, logo, and banner—so you may have multiple images that you want to use.

8. In a text editor, open **CustomizedHeaderContent.html**.

9. Replace the names of the image files with the ones that you copied to the **header** folder. Table 18 describes how to modify the header to display custom background, logo, and banner images.

Table 18: Customizing the header with a customer's branding

To Customize	Change the Line	To
The background image in the header (for example, with an image called **CustomerBackground.jpg**)	In the `<!--Header Background Div -->` section, change `/TwAmWeb/rto/Creo/en/images/NAVI_NavigationImages/NAVI_background.jpg`	`/TwAmWeb/custom/CustomerSpecific/<customerGUID>/header/CustomerBackground.jpg`
The logo image in the header (for example, with an image called **CustomerLogo.gif**)	In the `<!--Header Custom Logo Div -->` section, change `<IMG SRC="/TwAmWeb/rto/Creo/common/images/DefaultLogo.gif"`	`<IMG SRC="/TwAmWeb/custom/CustomerSpecific/<customerGUID>/header/CustomerLogo.gif”`
The banner image in the header (for example, with an image called **CustomerBanner.jpg**)	In the `<!--Header Custom Banner Div -->` section, change `<IMG SRC="/TwAmWeb/custom/header/SampleBanner.jpg"`	`<IMG SRC="/TwAmWeb/custom/CustomerSpecific/<customerGUID>/header/CustomerBanner.jpg"`

Note: When customizing the header for a specific customer, the image paths in **CustomizedHeaderContent.html** will look like `/TwAmWeb/custom/CustomerSpecific/<customerGUID>/header/`, where `<customerGUID>` is a code (for example, `82C6091914204A8885864076022AA24D`) that is unique to the customer for whom you are customizing the header. This is called a globally unique identifier, or GUID. To determine the customer's GUID, log on to Creative Workflow as a staff user. Open a project that belongs to the customer for whom you are customizing the header. In the Web page's URL, the code preceded by `CustId=` is the customer's GUID. For example: `CustId=82C6091914204A8885864076022AA24D`

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

10. Save your changes and close the file.

Customizing Footers

You can customize the Web page footer to reflect your company's branding, or you can customize a different footer for each customer, to reflect their own branding. This procedure describes how to customize a footer in either scenario.

1. Start InSite Creative Administration (see *Starting InSite Creative Administration* on page 8).
2. Click **Customization**.
3. Take one of the following actions, depending on whether you are customizing a footer to reflect your company's branding or your customer's branding:

Your Company's Branding	Your Customer's Branding
In the **Printer Customization** area, click **Browse**.	In the **Customer-Specific Customization** area, verify whether the customer for whom you want to apply the footer is already listed. If the customer is already listed, click **Browse** next to their name. If the customer is not listed, click **Select Another Customer**. Select the desired customer, and click **Choose**. When the customer name appears in the **Customer-Specific Customization** area, click the **Browse** button next to the name.

4. Open the **footer** folder.
5. Make a copy of the file **CustomFooterTemplate.html** and rename it **CustomFooter.html**. Save it in the **footer** folder.
6. Copy any images that you want to use in the footer to the **footer** folder.

   Images must be GIF or JPEG files. We recommend a width of 800 or 1024 pixels to fit the interface.
7. In a text editor, open **CustomFooter.html**, and scroll to the HTML table code at the bottom of the file. (The table code starts with `<TABLE>` and ends with `</TABLE>`.)

   You can increase your formatting options by adding table cells or rows, or new tables. Be aware that tables may display inconsistently across different browsers.
8. Replace the content `(Your Company's Custom Footer Content)` with what you want to appear in the footer. Table 19 provides examples.

Table 19: Customizing the footer

To Insert	**Change** `(Your Company's Custom Footer Content)` **To**
Your company's contact information	`My Company Phone: 111-123-2345 Fax: 111-123-1234`
Your company's logo image called **MyCompanyLogo.jpg**	`<IMG SRC="/TwAmWeb/custom/footer/MyCompanyLogo.jpg">`
Your customer's contact information	`Phone: 111-234-5678 Fax: 111-234-6789`
Your customer's logo image called **CustomerLogo.jpg**	`<IMG SRC="/TwAmWeb/custom/CustomerSpecific/<customerGUID>/footer/CustomerLogo.jpg">` where `<customerGUID>` is the globally unique identifier (GUID) unique to the customer for whom you are customizing the footer. For information about determining the customer's GUID, see page 63.

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

9. Save your changes and close the file.

Customizing the Desktop Logo

You can customize Desktop to display your company logo in the upper-left corner of the main window. Alternatively, you can customize Desktop to display a different logo for each of your customers, enabling each customer to see their own company branding when they log on.

In an integrated system, you perform the customization on the InSite server.

To display your company logo in Desktop:

1. Create the logo that you want to appear in Desktop.

   The graphic should be 74 by 74 pixels. (Other dimensions will be resized to fit.) A transparent background may make the graphic look better against the metal background of the main window.

2. Save the file as **banner.png**.
3. On the InSite server, in InSite Administration, click **Customization**.
4. In the **Printer Customization** area, click **Browse**.
5. Open the **syd_logo** folder.
6. Copy the **banner.png** file that you created in step 1 and paste it into the **syd_logo** folder, overwriting the existing **banner.png** file.

   The logo file must be named **banner.png** to appear in Desktop.

When you start Desktop, the old logo may still be visible. This is because Desktop caches the logo. In this case, you must clear the cache before the new logo will be visible.

To clear the Desktop cache to display the new logo:

1. In Desktop, from the **Kodak InSite Desktop** menu, select **Clear Cache**.
2. When prompted to confirm that you want to clear the cache, click **Clear**.
3. Quit and restart Desktop.

   The area in which you expect the logo to appear should now be empty because the cache is being populated with the new logo.
4. Quit and restart Desktop again.

   The new logo should be visible.

To display a customer's logo in Desktop:

1. Obtain the logo from the customer that you want to appear when the customer logs on to Desktop.

   The graphic should be 74 by 74 pixels (other dimensions will be resized to fit) and a PNG file. A transparent background may make the graphic look better against the metal background of the main window.
2. Save the file as **Logo_Desktop.png**.
3. On the InSite server, in InSite Administration, click **Customization**.
4. In the **Customer-Specific Customization** area, take one of the following actions:
   - If the customer whose logo you want to customize is already listed, click **Browse** next to the customer's name.
   - If the customer is not listed, click **Select Another Customer**. Select the desired customer, and click **Choose**.

   A new window opens, displaying the customer's customization folders.
5. Copy **Logo_Desktop.png** into the **header** folder.

Customizing the Interface in a Prepress Portal 5.0 System

If you upgraded your Creative Workflow and Asset Library system from version 2.1 to version 3.0.3, you must apply a new 'look' to update the appearance of the toolbar and Operations palette on the Creative Workflow and Asset Library pages of your Web site. Because Prepress Portal 5.0 also introduces a new look, applying the new look to Creative Workflow and Asset Library is essential; it ensures that your users have a consistent experience throughout your system. (If you installed a new 3.0.3 system for the first time, the new look 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 67.

Once the new look is applied, you can 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 Creative Workflow and Asset Library integrated with Prepress Portal 5.0, you create themes on the Prepress Portal server and then share them with Creative Workflow and Asset Library to ensure that the same theme displays for a customer regardless of whether they are in a job, project, or library. For instructions, see *Applying Themes* on page 67.

When you create themes in Prepress Portal, 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 Creative Workflow and Asset Library, only some of the components that you customize in the theme are applied to project and library 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 and library pages.

Note: If you upgraded your Creative Workflow and Asset Library system from version 2.1 to version 3.0.3, any customization of the Desktop logo that you performed in 2.1 (to display your company logo or customer-specific logos) still applies in 3.0.3. However, you cannot perform any new Desktop logo customization in Creative Workflow/Asset Library 3.0.3 and Prepress Portal 5.0.

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 Prepress Portal system role that includes the Configure Brands user right.

1. Log on to your Prepress Portal 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 Prepress Portal server to the corresponding location on the Creative Workflow/Asset Library server. This will ensure that the project and library 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 Creative Workflow and Asset Library, restart the Creative Workflow/Asset Library server. This forces a database synchronization between the Prepress Portal server and the Creative Workflow/Asset Library server, and resets the Creative Workflow/Asset Library themes cache.

   Note: When you view footer content on a project or library page, a link to download Desktop is automatically included and you cannot remove or modify it. The link does not appear when you view footer content on a job page.

Customizing Element Attributes

Note: This section is applicable only if your system includes Asset Library.

When a user selects an element in a library, and clicks **Get Attributes** (in a Web browser) or **View Attributes** (in Desktop), information about the selected element is displayed in the Attributes dialog box.

The attributes appear on three tabs: **System**, **Customer**, and **Site**.

The attributes on the **System** tab are called *system attributes*. The operating system extracts and displays system attributes on the **System** tab. Depending on the file type of the selected element, the system attributes can include the file creation date, file size, file type, last accessed date, last modified date, number of pages (if the element is a PDF file), color spaces used, whether the file includes transparency, and whether the file can be separated (and if not, why not). Users cannot modify the values of any attributes on the **System** tab.

The attributes on the **Customer** and **Site** tabs are called *user-defined attributes* because you define what attributes appear on these tabs. You define the attributes in attribute templates. After you define the attributes, users can modify the values of these attributes in the Attributes dialog box. (For example, if you defined the attribute **Photographer**, a user could assign the value `John Smith` for a particular element.)

The **Site** attributes that you define appear the same for all users that use your system, whereas you can make the attributes that appear on the **Customer** tab unique to each customer.

Defining attributes requires some knowledge of HTML.

To define the Site attributes for all customers:

1. Start InSite Creative Administration. (See *Starting InSite Creative Administration* on page 8.)
2. Click **Customization**.
3. In the **Printer Customization** area, click **Browse**.
4. Open the **Attribute** folder.
5. In a text editor, open **Site_Template.xml**, and save it as a new file named **Site.xml**.

6. Edit **Site.xml** to add the attributes that you want to appear on the **Site** tab of the Attributes dialog box for all users.

   Between the opening and closing `<site>` and `</site>` tags, add attributes in the following format:

   ```
   <attr name="<attribute>" type="<type of value>"/>
   ```

   Where `<attribute>` is the name of the attribute as it will appear on the **Site** tab, and `<type of value>` is `date`, `string`, or `number`, depending on the type of value you want users to enter for the attribute.

   Examples:

   ```
   <attr name="creation date" type="date"/>
   <attr name="printer name" type="string"/>
   <attr name="number of colors" type="number"/>
   ```

7. Save your changes and close the file. Ensure that you save the file to **<Data drive>\inetpub\wwwroot\TwAmWebRoot\RUser\custom\Attribute**.

To define the Customer attributes for a specific customer:

1. Start InSite Creative Administration. (See *Starting InSite Creative Administration* on page 8.)
2. Click **Customization**.
3. In the **Printer Customization** area, click **Browse**.
4. Open the **Attribute** folder.
5. Copy **Customer_Template.xml**.
6. Open the **Customer** folder and locate and open the folder for the customer whose attributes you want to customize. Paste the **Customer_Template.xml** file into the folder.
7. Rename the file to **Customer.xml**.
8. Open the file in a text editor and edit it to add the attributes that you want to appear on the **Customer** tab of the Attributes dialog box for this specific customer.

   Between the opening and closing `<site>` and `</site>` tags, add attributes in the following format:

   ```
   <attr name="<attribute>" type="<type of value>"/>
   ```

   Where `<attribute>` is the name of the attribute as it will appear on the **Customer** tab, and `<type of value>` is `date`, `string`, or `number`, depending on the type of value you want users to enter for the attribute.

   Examples:

   ```
   <attr name="creation date" type="date"/>
   <attr name="photographer" type="string"/>
   <attr name="resolution" type="number"/>
   ```

9. Save your changes and close the file.

7

Setting Up Color Management

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Overview

If the Matchprint Virtual technology is licensed for your system, you can use Matchprint Virtual technology to view color-accurate proofs of project elements in Smart Review. (For instructions on setting up the Matchprint Virtual technology, see *Setting Up Matchprint Virtual* on page 84.)

When a user monitor-proofs an element in Smart Review using Matchprint Virtual, the element must be converted from its original color space to an RGB color space that can be viewed on the monitor. The element's colors as they appear on the monitor must also accurately represent the colors as they will look when the element is output to a proofer or printed on a printing press.

Color Conversion Process

To perform color conversion, Creative Workflow renders the element according to any *source profiles* that are assigned to the element and the *color target* that is applied to the element. Creative Workflow first converts the graphic and image objects in the element from their original CMYK or RGB color spaces to a device-independent color space and then to CMYK press space. This is done by applying the source profiles assigned to the element, and then applying the press profile selected in the color target. The result is an intermediate image in CMYK press space, which corresponds to the color space and gamut of the output device—for example, a printing press.

Creative Workflow then converts the CMYK image in press space to a device-independent color space and then to an RGB color space for display on the monitor. This is done by applying the proof profile selected in the color target, and then applying an RGB monitor profile from Matchprint Virtual.

Figure 2 illustrates the color conversion process.

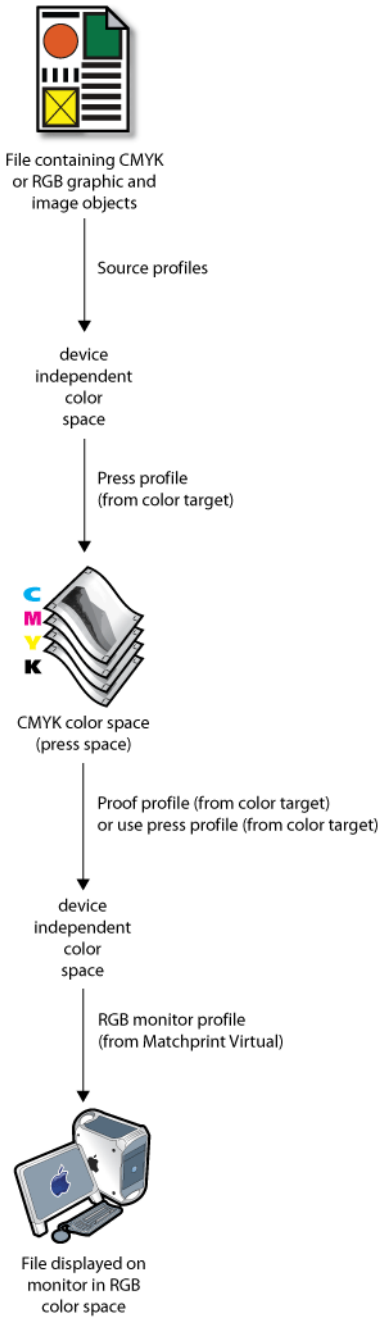


Figure 2: Color management in Smart Review

Source Profiles

The source profile of an element specifies how the CMYK or RGB values in the element should be interpreted as an actual color when displayed or output through a given device.

Source profiles can be assigned to an element at various points in an element's lifecycle:

- First, source profiles can be assigned to an element when the file is created—for example, in Adobe Photoshop® or Adobe Illustrator® software, or by a device such as a camera or scanner.
- Second, you can configure Creative Workflow to automatically assign certain source profiles to elements when those elements are uploaded (see *Specifying Default Source Profiles* on page 76).
- Third, after an element is uploaded, a user can change the source profiles that were previously assigned to the element. (For more information, see the Creative Workflow and Asset Library Help.)

Multiple source profiles can be assigned to a single element, for each of the four types of objects that the file may contain:

- CMYK graphics
- CMYK images
- RGB graphics
- RGB images

Note: If no source profiles are assigned to the CMYK objects in the file, Creative Workflow assumes that those objects are already in the target CMYK color space. If no source profiles are assigned to the RGB objects in the file, Creative Workflow automatically applies the Adobe RGB (1998) profile to those objects.

Color Targets

A color target defines how to display an element's colors on a monitor so as to accurately represent what the element will look like when output to a proofer or printed on press.

You create color targets in Color Target Manager on the Creative Workflow/Asset Library server. (For instructions, see *Creating a Color Target* on page 77.)

When a user creates a color approval task for an element in a project, they select a color target to be applied to the element when the user assigned the task opens the element in Smart Review. (Note that when a user opens an element in Smart Review that is *not* associated with any tasks, the user can apply different color targets to the element, to see how the element's colors might look when printed under different conditions—for example, to a different press or on a different paper stock. For more information about selecting color targets for tasks and changing color targets in Smart Review, see the Creative Workflow and Asset Library Help.)

You may want to create multiple color targets if you have multiple color output devices with different color characteristics, or you have variable printing conditions such as different paper and inks.

When you create a color target, you can specify the following:

- A press profile
- A proof profile
- Color conversion settings
- A media white point

A *press profile* describes the color space of an *output device*. When a color target is applied to an element, the press profile associated with the color target converts the element from a device-independent color space (such as L*a*b*) to the CMYK color space that corresponds to your press's available color gamut and specific printing conditions. (The CMYK color space may also be referred to as the CMYK *press space*.) You may have multiple press profiles if you have multiple presses or output devices with different color characteristics, or variable printing conditions.

A *proof profile* describes the color space of a *proofing device*. When a color target is applied to an element, the proof profile associated with the color target converts the element from the CMYK color space to a device-independent color space again, and then to an RGB color space so that the element can be viewed on an RGB color monitor in Smart Review. The proof profile ensures that the element's colors that you see on screen accurately represent what the element's colors would look like if you output the element to the proofer with which the profile is associated. (You can also use the press profile for the proof profile. This is discussed in detail on page 80.)

The proof profile may be a custom ICC color profile that you receive from Kodak Color Services for your proofer. You will likely have one proof profile for each of your color proofers. We recommend that you store all of your proof **profile .icc files** in the folder **<Creative_Workflow_system_drive>\Creo\TWAM\data\ICC-Profiles.**

For more information about selecting profiles and color conversion options in a color target, see *Creating a Color Target* on page 77.

N-Color Profiles

If desired, you can select an n-color profile as the proof profile to be associated with a color target. (For instructions on associating a proof profile with a color target, see *Creating a Color Target* on page 77.)

When you select an n-color profile as the proof profile for a color target and then apply the color target to an element that contains spot colors, the spot colors are not converted to CMYK press space. Instead, the n-color profile is used to convert the spot colors directly to RGB color space for improved spot color fidelity.

If the element contains both CMYK and spot colors, the CMYK colors are converted to CMYK press space while the spot colors are not. Then all colors in the element (CMYK and spot colors) are converted to RGB color space using the n-color profile.

N-color profiles cannot be used as press profiles.

Specifying Default Source Profiles

As described in *Source Profiles* on page 74, you can configure Creative Workflow to automatically assign certain source profiles to any untagged CMYK and RGB graphic and image objects in an element when the element is uploaded to a project.

1. In InSite Creative Administration (see *Starting InSite Creative Administration* on page 8), click **Configuration Settings > Color Management**.
2. In the **CMYK Graphic Default Source Profile** list, select the profile to be assigned by default to any untagged CMYK graphic (vector) objects in an element when the element is uploaded.

   Important: The default selection for the CMYK graphic source profile is **Unassigned**. In most cases we strongly recommend that you leave the selection as **Unassigned**, because assigning a source profile to CMYK graphic objects can degrade performance during rendering of the element in Smart Review, and will alter the interpretation of overprinted process objects, potentially altering the appearance of the element. If no source profile is assigned to an untagged CMYK graphic object when the element is uploaded, Creative Workflow will assume that the object is already in the target CMYK color space. If you need to assign a source profile to the CMYK graphic objects in a specific element, we recommend that you assign the profile manually to that element only, after the element is uploaded to a project. (For instructions, see the Creative Workflow and Asset Library Help.)
3. In the **CMYK Image Default Source Profile** list, select the profile to be assigned by default to any untagged CMYK image (raster) objects in the element when the element is uploaded.

   Note: The default selection for the CMYK image source profile is **Unassigned**. If no source profile is assigned to an untagged CMYK image object when the element is uploaded, Creative Workflow will assume that the object is already in the target CMYK color space.
4. In the **RGB Graphic Default Source Profile** list, select the profile to be assigned by default to any untagged RGB graphic objects in the element when the element is uploaded.
5. In the **RGB Image Default Source Profile** list, select the profile to be assigned by default to any untagged RGB image objects in the element when the element is uploaded.

   Note: An RGB object cannot be rendered in Smart Review without using an RGB profile. If no source profile is assigned to an untagged RGB object when the element is uploaded, Creative Workflow will automatically use the Adobe RGB (1998) profile when the object is rendered.
6. Click **Update**.

Adding and Removing Source Profiles

Only source profiles that reside in the folder **<Creative_Workflow_system_drive>\Creo\TWAM\data\MatchprintVirtual\Source ICC Profiles** are available for selection on the Color Management page in InSite Creative Administration.

Creative Workflow ships with several source profiles already installed. If you want to make additional source profiles available, place their .icc files in the **Source ICC Profiles** folder. When you place a source profile in the folder, it automatically appears in the source profile lists on the Color Management page. (You may need to refresh the page.)

Two sources for source profiles are the International Color Consortium (http://www.color.org/drsection1.html) and the European Color Initiative (http://www.eci.org/eci/en/060_downloads.php).

The **Source ICC Profiles** folder also includes a subfolder called **unused**. If you do not want a certain source profile to appear in the lists on the Color Management page, you can move the profile's .icc file into the **unused** folder. You can easily move the profile back into the root **Source ICC Profiles** folder later if you want it to appear again.

Note: After an element is uploaded to a project, a user can change the source profiles that are assigned to the element's CMYK or RGB graphic and image objects. The source profiles that are available for selection are the profiles in the **Source ICC Profiles** folder (the same profiles available for selection from the Color Management page in InSite Creative Administration).

Creating a Color Target

1. On the Creative Workflow/Asset Library server, select **Start > Programs > Kodak TwEM > Color Target Manager**.

   The Manage Color Targets dialog box lists any existing color targets.
2. From the **File** menu, select **New Color Target**.
3. Select the options in the New Color Target dialog box, as described in Table 20, and click **Create**.

   The new color target appears in the **Color Target** list in the Manage Color Targets dialog box.

Table 20: New Color Target dialog box options

Option	Description
Color Target Name	Type a name for the color target. This is the name that will appear in Creative Workflow when a user selects a color target to use for a color approval task, and in Smart Review when a user changes the color target that is applied to an element they are viewing.
Press Profile	Select from the list the press profile that you want to associate with this color target. Only press profiles that reside in the folder **<Creative_Workflow_system_drive>\Creo\TWAM\data\MatchprintVirtual\Press ICC Profiles** are listed. You can make additional press profiles available in the list by placing their .icc files in the **Press ICC Profiles** folder. When you place a press profile in the folder, it automatically appears in the **Press Profile** list. (You may need to refresh Color Target Manager.) **Tip:** The **Press ICC Profiles** folder also includes a subfolder called **unused**. If you do not want a certain profile to appear in the **Press Profile** list, you can move the profile's .icc file into the **unused** folder. You can easily move the profile back into the root **Press ICC Profiles** folder later if you want the press profile to appear in the list again. Note that the name of a profile as it appears in the **Press Profile** list may not match the file name of the profile in the **Press ICC Profiles** folder. This is because the .icc file may contain a display name that determines how the profile appears in the list. As well, there may be more .icc files in the folder than appear in the **Press Profile** list. This is because the list displays only CMYK profiles; other color space profiles that reside in the folder do not appear in the list. The **Press Profile** list also displays a default selection that appears as <Default - [default_profile]>. The .icc file for this profile does not reside in the **Press ICC Profiles** folder and you cannot change the default profile. As well, when you select the default profile in the list, you cannot select **Use Press profile for Proof profile**.

Option	Description
Rendering Intent	The method for converting colors from one color space to another and adjusting colors that are out of gamut for the destination device. This applies to the conversion from source profiles to press space. Different rendering intents use different rules to determine how source colors are adjusted. For example, colors that fall inside a destination gamut may remain unchanged, or may be adjusted to preserve the original visual relationships when they are translated to a smaller destination gamut. Options are as follows: • **Perceptual**—Tries to preserve the visual relationship between colors so that they are perceived as natural to the human eye, even though color values may change. This method is suitable for photographic images with many out-of-gamut colors. • **Saturation**—Tries to produce vivid colors at the expense of color accuracy. This method is suitable in cases where bright, saturated colors are more important than the relationship between the colors. • **Relative Colorimetric**—Compares the extreme highlight of the source color space to that of the destination color space and shifts all colors accordingly. Out-of-gamut colors are shifted to the closest reproducible color in the destination color space. • **Absolute Colorimetric**—Tries to maintain color accuracy at the expense of preserving relationships between colors. Leaves colors that fall inside the destination gamut unchanged, while out-of-gamut colors are clipped. There is no scaling of colors to the destination white point.
Ignore RGB source profiles	Select this option if you want any RGB source profiles that were assigned to an element at any point in the element's lifecycle (as described in *Source Profiles* on page 74) to be ignored by the color target. When you select this option, RGB source profiles are only ignored; they are not removed from the element.
Ignore CMYK source profiles	Select this option if you want any CMYK source profiles that were assigned to an element at any point in the element's lifecycle (as described in *Source Profiles* on page 74) to be ignored by the color target. When you select this option, CMYK source profiles are only ignored; they are not removed from the element.
Use black point compensation	Select this option if you want to preserve the shadow details in an image by simulating the full dynamic range of the output device. This option is recommended if black point compensation will be used when printing.
PDF/X output intent overrides press profile	Select this option if you want any color profiles embedded in a PDF file to override the selected press profile. Applies to PDF/X-compliant files only.

Option	Description
Use Press profile for Proof profile	It is possible for the proof of an image to look different than what the image will look like when printed on a press. If you would prefer that your customer monitor-proofs a representation of an element as it would look when printed on press rather than as it would look when output to a proofer, select **Use Press profile for Proof profile**. When you select this option, the press profile that you selected in the **Press Profile** list automatically appears in the **Proof Profile** box, indicating that the same press profile will be used both to convert the element to CMYK press space and then to the monitor's RGB color space. If you would prefer that your customer monitor-proofs a representation of an element as it would look when output to a proofer, select a proof profile in the **Proof Profile** box instead.
Proof Profile	Click **Browse** to locate and select the proof profile (an .icc file) that you want to associate with this color target. (Note that this option is available only if you *did not* select **Use Press profile for Proof profile**.) The recommended location for storing your proof profiles is **<Creative_Workflow_system_drive>\Creo\TWAM\data\ICC-Profiles**, although you can browse to and select profiles from other locations.
Media White Point	Type the **X**, **Y**, and **Z** values for the paper stock that you want to associate with this color target.
Use Advanced Spot Mixing	This feature is not yet functional.

Note: When you create a color target, a new folder is created for the color target in **Twam\data\ColorManagement** and copies of the press and proof profiles that you selected for the color target are placed in this new folder. The original copy of the press profile remains in the **<Creative_Workflow_system_drive>\Creo\TWAM\data\MatchprintVirtual\Press ICC Profiles** folder, and the original copy of the proof profile remains in the **<Creative_Workflow_system_drive>\Creo\TWAM\data\ICC-Profiles** folder (or wherever you originally stored the proof profile's .icc file).

Modifying A Color Target

You can modify an existing color target, for example, if you want to change the press or proof profile that it uses, or change its other color conversion settings. You can also create a new color target by using an existing color target. This is convenient if you want to create a new color target that has many of the same settings as an existing color target.

To modify an existing color target:

1. On the Creative Workflow/Asset Library server, select **Start > Programs > Kodak TwEM > Color Target Manager**.

   The Manage Color Targets dialog box lists any existing color targets.

2. In the **Color Target** list, either double-click the color target that you want to modify, or select the color target and select **Edit > Edit Color Target**.
3. Modify the color target as desired, and click **OK**.

To create a new color target based on an existing color target:

1. In Color Target Manager, in the **Color Target** list, select the existing color target on which you want to base the new target.
2. Select **Edit > Copy Color Target**.
3. Type a name for the new color target, and click **Copy**.
4. Modify the new color target as desired. (See the previous procedure.)

Limiting Color Target Availability

When a user creates a color approval task for an element in a project, they select a color target to be applied to the element when the user assigned the task opens the element in Smart Review.

By default, all of the color targets that you create in Color Target Manager are available for selection, but you can limit the color targets that are available to specific customers. Then when a user select a color target in a color approval task, only the color targets that you make available to the user's particular organization are visible for selection. (The color targets available for selection in Smart Review are also limited accordingly.)

You might want to limit specific color targets to specific customers if, for example, you have many color targets or a particular color target includes a specific customer's name.

1. In InSite Creative Administration (see *Starting InSite Creative Administration* on page 8), click **Color Target Associations**.

   All of the customers in your system are listed. The **Associated Color Targets** column indicates how many color targets are available to each customer.
2. In the row for the customer whose available color targets you want to specify, click **modify**.
3. Click **Selected Color Targets**.
4. In the list of color targets that appears, select the check box for each color target that you want to make available to the customer and clear the check box for each color target that you do not want to make available to the customer.
5. Click **Update**.

Defining Spot Color L*a*b* Values

Creative Workflow provides a spot color database that you can use to define the L*a*b* values of spot colors. When you monitor-proof an element in Smart Review that contains a spot color, Creative Workflow looks in the spot color database for the name of the spot color that matches the spot color found in the element. If it finds a match, it uses the L*a*b* recipe from the database (rather than the CMYK recipe from file) to convert the spot color from CMYK to L*a*b* to RGB. This results in more accurate color representation in Smart Review.

The database comes with a number of PANTONE® spot color recipes already defined, but you can add additional spot colors as desired. You can also modify a spot color's values, create a new spot color recipe based on an existing recipe, and delete a spot color.

To define a new spot color's L*a*b* values:

1. On the Creative Workflow/Asset Library server, select **Start > Programs > Kodak TwEM > Creative Workflow Color Editor**.
2. Click **Add**.
3. In the **Name** box, type a name for the spot color.
4. In the **Opacity** list, select the spot color's opacity.
5. Adjust the sliders (or type in the corresponding text boxes) to specify the spot color's **L**, **A**, and **B** values.
6. Click **Apply**.

   The new spot color appears in the **Colors** area.

To modify a spot color:

1. In the **Colors** area, select the spot color that you want to modify, and click **Edit**.
2. Modify the spot color's name, opacity, and L*a*b* values as desired, and click **Apply**.

To create a new spot color based on an existing spot color:

1. In the **Colors** area, select the existing spot color on which you want to base the new spot color, and click **Copy**.
2. In the **Name** box, type a name for the new spot color.
3. Modify the spot color's opacity and L*a*b* values as desired, and click **Apply**.

   The new spot color appears in the **Colors** area.

To delete a spot color:

1. In the **Colors** area, select the spot color that you want to delete, and click **Remove**.
2. When prompted to confirm that you want to delete the color recipe, click **Yes**.

Note: Creative Workflow does not prevent you from deleting or modifying the standard PANTONE spot color recipes.

About Spot Color Name Matching

Creative Workflow uses the following rules to match the name of a spot color found in an element with a spot color in the spot color database:

Table 21: Spot color name-matching rules

A spot color in the element with this suffix	Is matched to a spot color in the database with this suffix
CVC, CV, EC, or PC	C (coated)
CVU	U (uncoated)
CVM	M (matte)

For example, if an element being viewed in Smart Review contains a spot color named **PANTONE 2711 CVC**, Creative Workflow will match the spot color with a spot color in the database named **PANTONE 2711 C**.

Setting Smart Review's Paper Size

When viewing a color-managed element in Smart Review, a user can view the image in Full Screen mode for optimal color-accurate viewing. When the image is viewed in Full Screen mode, a border representing the paper background appears around the image. You can configure the size of this border. You may want to change the size of the border because the white space around the image can affect how the image's colors appear on screen.

The color of the border is determined by the media white point specified in the color target that is applied to the element.

1. In InSite Creative Administration (see *Starting InSite Creative Administration* on page 8), click **Configuration Settings > Color Management**.
2. In the **Paper Background Size** box, specify the desired size of the paper border in points. (The default size is **72** points.)
3. Click **Update**.

For instructions on viewing an element in Full Screen mode in Smart Review, see the Creative Workflow and Asset Library Help.

Setting Up Matchprint Virtual

Licensing the Software

Matchprint Virtual technology is a licensed option; your Creative Workflow and Asset Library software license controls whether your system will have the Matchprint Virtual technology and the number of customers who have access to this feature.

Typically your Creative Workflow and Asset Library license key is entered during the installation of the software. You may want to view your license key to see which licensed options you have, or you may need to enter a new license key if you purchased the Matchprint Virtual option after the initial installation of your Creative Workflow and Asset Library software. For instructions, see *Viewing and Adding Licenses* on page 8.

Installing Calibration Software

To ensure color-accurate viewing, your users must install Matchprint Virtual calibration software on their qualified Apple Macintosh® computers and must run it daily to calibrate the monitor. If the deltaE exceeds 2.5, calibration fails.

For instructions on installing the calibration software, as well as a list of approved monitors and other hardware requirements, see the *Matchprint Virtual for Creative Workflow Quick Start Guide*, available on http://graphics.kodak.com/matchprintvirtual.

Adjusting Your Viewing Environment

You and your customers are responsible for assessing and adjusting your own viewing environments to ensure that they meet the basic standards for color-accurate monitor-proofing. For tips on managing your viewing environment, see the *Matchprint Virtual System Administration Guide*, available on http://graphics.kodak.com/matchprintvirtual.

8 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 Creative Workflow/Asset Library 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 86.)

However, the system backup does not back up any of the project or library 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 87.

For detailed instructions on how to configure, back up, and recover backups for Creative Workflow and Asset Library, 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 Creative Workflow/Asset Library 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 then triggers the Creative Workflow Online Backup. Creative Workflow 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**

Creative Workflow 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 Creative Workflow and Asset Library integrated with InSite or Prepress Portal and Prinergy, you can use Prinergy Backup Manager to trigger Online Backup on the Creative Workflow/Asset Library server. To do so, you must add the Creative Workflow/Asset Library 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 Creative Workflow/Asset Library 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 86, Creative Workflow Online Backup automatically backs up certain files on the System, DataLog, and Data drives on your Creative Workflow/Asset Library server. However, you are responsible for implementing your own backup solution to back up and store the project, library, 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. Creative Workflow and Asset Library do 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, Smart Review annotations associated with those elements, and other project-related information. It is critical that you back up the contents of this folder.
- **Libraries**—Contains any elements uploaded to libraries and library-related information. If your system is licensed for libraries, it is critical that you back up the contents of this folder.
- **TWSystemData**—Contains cached thumbnail images and cached raster images (.png files) used by Matchprint Virtual. It is not critical that you update the contents of this folder, but if you do not, the system will have to regenerate the thumbnail and raster images 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 Creative Workflow/Asset Library 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.

9

Adding Variable Data Print

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Overview

This chapter describes any additional steps that you must take to configure your system if you are running Kodak InSite Variable Data Print software in conjunction with Creative Workflow and Asset Library.

What Is Variable Data Print?

Variable Data Print software enables you to create variable data print (VDP) templates and make them available to other users to create personalized print items.

When you run Variable Data Print in conjunction with Creative Workflow, the Variable Data Print functionality is provided through the **Variable Data Print** tab inside each of your projects. (Creative Workflow and Variable Data Print share the same projects.)

Variable Data Print is licensed in the same way as Creative Workflow and Asset Library (see *Viewing and Adding Licenses* on page 8) and runs on the same server as Creative Workflow and Asset Library.

You can access the Variable Data Print features through a Web browser on a computer running either the Mac OS X or Windows operating system (see *Web Browser Compatibility* on page 3). However, unlike Creative Workflow and Asset Library, you cannot access Variable Data Print through Desktop. (You can still open a project through Desktop but you will be unable to access the Variable Data Print functionality within that project.)

How Do I Use Variable Data Print?

To create a variable data print (VDP) template, you must first create a template file in InDesign CS2 on a computer running Microsoft Windows. (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 output a Darwin job. The result is a .drwn file that 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 outputting Darwin job files, see your *Darwin VI Authoring Tool for Adobe InDesign User Guide*.)

Once you have the .drwn file, you upload the file into a project. The Darwin job is automatically registered with the Web Composition Server (WCS)—the Darwin engine that is installed on your Creative Workflow/Asset Library/Variable Data Print server. This enables VDP 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 the Kodak InSite Storefront system, you can also publish VDP templates to your Storefront catalogs. Users can then order print jobs based on these 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.

Assigning Variable Data Print User Rights

Chapter 4, *Managing Users* describes what each system/customer, project, and library user right enables your users to do and how to assign roles to your system's users. When you add the Variable Data Print software to your system, you create roles and assign roles to users in exactly the same way, except that two VDP project user rights become available in addition to the project user rights that are available with Creative Workflow:

- Personalize VDP Templates: Create personalized print items based on available VDP templates. The View Elements Tab right must be selected for this right to be available.
- Manage VDP Templates: Create 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.

Note: When Variable Data Print is installed at the same time as Creative Workflow, the Personalize VDP Templates and Manage VDP Templates project user rights are automatically included in the default Administrator project role. When you add Variable Data Print to your existing system, the VDP user rights are not automatically added to any default project roles, but you can manually add them to any project roles as desired.

A

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 Creative Workflow and Asset Library integrated with InSite 4.5 or Prepress Portal 5.0, your Web site URL should be the InSite or Prepress Portal logon page's URL. **Note:** The Web site URL must also be specified in order for Web browser and Desktop 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 Creative Workflow and Asset Library 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 Creative Workflow and Asset Library 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 a customer user's session *in a Web browser* can be idle before it is disconnected. The default setting is 20 minutes. You might want to decrease the time that a Web browser session can be idle in order to tighten the security of your system. Any change to this setting requires a restart of Creative Workflow and Asset Library to take effect.
Staff User Session Timeout	The number of minutes a staff user's session *in a Web browser* can be idle before it is disconnected. The default setting is 20 minutes. You might want to decrease the time that a Web browser session can be idle in order to tighten the security of your system. Any change to this setting requires a restart of Creative Workflow and Asset Library to take effect.

Setting	Description
Desktop Application Session Timeout	The number of minutes that a customer or staff user's session *in Desktop* can be idle before it is disconnected. (You can specify only one timeout that applies to all users who are using Desktop.) The default setting is 20 minutes. You might want to decrease the time that a Desktop session can be idle in order to tighten the security of your system. Any change to this setting requires a restart of Creative Workflow and Asset Library to take effect.
Smart Review Service Communication Port	The TCP/IP port used by Smart Review. This is usually set to 443 and cannot be changed.
Browser Security	The level of encryption that must be used when information is transferred between a client workstation and the Creative Workflow/ Asset Library 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 Creative Workflow and Asset Library installation and it is unlikely that you will need to change it later.

System and Networking

These settings define where projects and libraries are stored, and the frequency at which deleted elements, projects, and libraries 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. When running Creative Workflow and Asset Library integrated with InSite 4.5, you should *not* select this option. When running Creative Workflow and Asset Library integrated with Prepress Portal 5.0, you *must* select this option. 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 Creative Workflow/Asset Library 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	The location where libraries are stored. This is typically the Data drive on the Creative Workflow/Asset Library server. If you want to change the library storage location to a tertiary server, contact your Kodak service representative for assistance. Any change to this setting takes effect immediately.
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 17.

Setting	Description
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 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 have been 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 17.
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 will be purged from disk. For example, if you type 3, deleted files will be purged from disk every three days. If you type 0, deleted files will be 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 17.

Co-operating Systems

These settings define the other servers that the Creative Workflow/Asset Library server connects to.

Setting	Description
Co-operating InSite server	In an integrated system, the name of the InSite or Prepress Portal server to which the Creative Workflow/Asset Library server is connected. This setting is configured during the Creative Workflow and Asset Library 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 Creative Workflow/Asset Library server is connected. This setting is configured during the Creative Workflow and Asset Library 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 and FPO versions of elements from projects and libraries. They also specify how the system should check uploaded files for missing fonts and what it should do when fonts are missing.

The FPO settings in this section are applicable only if your system includes Asset Library.

Setting	Description
Resolution for LowRes RGB JPEG Proofs	The resolution options available to users when downloading low-resolution JPEG versions of elements from projects and libraries. Separate multiple values by semicolons (for example, `72;150;300`). **Note:** When you specify available JPEG resolutions, these resolutions only take effect when downloading elements from a Web browser. When downloading elements from Desktop, the JPEG resolution options are fixed and cannot be modified. Any change to this setting takes effect immediately. For more information, see *Specifying JPEG Download Options* on page 13.

Setting	Description
Allow Download of LowRes JPEG Images from libraries	Select or clear the check box to allow or prevent users from downloading low-resolution JPEG versions of elements from libraries. When you disable this option, the **Download JPEG** button disappears from the Operations palette when users are in a library (although it is still available when users are in a project). This setting takes effect only for users who log on using a Web browser; you cannot disable JPEG download for Desktop users. Any change to this setting takes effect immediately. For more information, see *Specifying JPEG Download Options* on page 13.
Resolution of printable FPO previews	Users can download FPO versions of elements from libraries for placement in layouts. This setting specifies the resolution of the FPO preview that is visible when a user prints a layout that contains an FPO (for example, to a laser printer). The default resolution is 72 ppi. Note that the **Generate printable FPO previews** setting must be selected for the FPO preview to appear when the layout is printed. Any change to this setting takes effect immediately. For more information about FPO files, see *Specifying FPO Download Options* on page 14.
Generate compressed FPO previews	When this setting is selected and a user downloads an FPO file that contains a printable preview (**Generate printable FPO previews** is selected), the printable preview is compressed to reduce the FPO's file size. This helps to offset the increased file size of the FPO due to including a printable preview in the FPO. This setting does not affect the resolution of the printable preview itself and the user should not see any difference in the preview. Any change to this setting takes effect immediately. For more information about FPO files, see *Specifying FPO Download Options* on page 14.

Setting	Description
Generate printable FPO previews	When a user downloads an FPO version of an element and places it in a layout, this setting specifies whether the FPO will contain a printable preview. (An FPO version of an element is an EPS file. The printable preview makes the EPS file visible when printed.) The resolution of the printable preview is determined by the **Resolution of printable FPO previews** setting. You may choose to clear this setting to make FPO files smaller. However, clearing this setting has two implications. First, when a user prints a QuarkXPress or InDesign file (for example, to a laser printer) that contains an FPO, the area where the FPO is placed will print blank, although image swapping is maintained. (It is possible to force QuarkXPress and InDesign to print the screen preview of the FPO instead. For details, see the *EyeMedia Image Proxy Workflow For Printers User Guide*.) Second, when a user prints an InDesign file containing a FPO as a PDF file, all OPI comments are removed from the FPO and no image swapping will occur when the PDF file is sent to the printer's workflow. In other words, the FPO must include a print preview in order for its OPI comments to be maintained when the InDesign file is printed as a PDF. For more information, see the *EyeMedia Image Proxy Workflow For Printers User Guide*. Any change to this setting takes effect immediately. For more information about FPO files, see *Specifying FPO Download Options* on page 14.
Fail On Missing Fonts	When you select this option, files of any type *except* PDF are checked for missing fonts during upload processing. If an uploaded file is missing a font, the TwAm Processor, which processes uploaded files, checks the folder **<Data drive>\TWFonts** on the Creative Workflow/Asset Library server. If it finds the missing font in this folder, it embeds the font into the uploaded file. If the missing font cannot be found in the **TWFonts** folder, an error message appears indicating that the font was not found, and a large X appears on the element's thumbnail in the Elements view. If this option is not selected, the TwAm Processor still identifies missing fonts in any uploaded files and tries to embed the missing fonts by looking in the **TWFonts** folder. If a missing font does not reside in the folder, a warning message appears indicating that the font was not found. However, upload processing continues and no X appears on the element's thumbnail. This option applies to non-PDF file types only. To perform font checking on PDF files, you must select **Do Font Processing on PDFs**. By default, this option is not selected. Any change to this setting takes effect immediately.

Setting	Description
Do Font Processing on PDFs	When you select this option, the TwAm Processor checks uploaded PDF files for missing fonts. If an uploaded file is missing a font, and **Fail On Missing Fonts** is also selected, an error message appears indicating that the font was not found, and a large X appears on the element's thumbnail in the Elements view. If an uploaded file is missing a font, and **Fail on Missing Fonts** is *not* selected, a warning message appears indicating that the font was not found. However, upload processing continues and no X appears on the element's thumbnail. When you clear **Do Font Processing on PDFs**, the TwAm Processor does not process uploaded PDF files. PDF files can still be uploaded, but they are not checked for missing fonts. By default, this option is not selected. Any change to this setting takes effect immediately.

Rendering

These settings define how element images and thumbnails are created and cached when elements are uploaded or opened in Smart Review.

Setting	Description
Raster Cache Image Size	When an element is first opened in Smart Review, a raster image of the element (a .png file) is created and cached on the Creative Workflow/Asset Library server. This file is used for initial display of the element in Smart Review and for small zoom factors, to make display and refreshing of the image faster. Use this setting to specify the size (in pixels) of the raster image file. The recommended size is 1600 pixels for most standard monitors, and 3200 pixels for larger monitors (for example, cinema display monitors). The maximum supported size is 3200. Any change to this setting takes effect immediately.

Setting	Description
Pre-Render Processing Level	Specifies whether a raster image and thumbnail of an element should be pregenerated and cached when the element is first uploaded. Generating a raster image and thumbnail of an element even before the element is viewed as a thumbnail or opened in Smart Review speeds up the initial display of the element in Smart Review. However, uploading the element will take longer, and more disk space is required on the Creative Workflow/Asset Library server. You may choose not to pregenerate raster images or thumbnails if upload speed is a concern, disk space is limited, or you don't expect your users to view elements in Smart Review frequently. Type **0**, **1**, or **2** in the box as follows: • **0**—No raster image *or* thumbnail of the element is created on upload. In this case, no element thumbnail is pregenerated, but Creative Workflow still creates a thumbnail of the element "on the fly" when you view the element as a thumbnail (for example, in Gallery Display mode in Desktop). • **1**—A thumbnail of the element is created on upload, but no raster image. • **2**—Both a raster image and a thumbnail of the element are created on upload. Any change to this setting takes effect immediately.
Preserve Intermediate Render Cache	Specifies whether the raster image of an element that was created and cached when the element was opened in Smart Review should be saved between Smart Review sessions. Selecting this option will speed up zooming and panning the next time the element is opened in Smart Review, but uses more disk space on the Creative Workflow/Asset Library server to save the file between sessions. Any change to this setting takes effect immediately.
Generate Large Thumbnails	When element thumbnails are pregenerated on element upload (as specified in **Pre-Render Processing Level**), large thumbnails are generated. Large thumbnails are used in Desktop. Any change to this setting takes effect immediately.
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 44.

eCentral

These settings define your Creative Workflow/Asset Library 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 Creative Workflow/Asset Library server to update eCentral with Creative Workflow and Asset Library statistics whenever a user logs in to Creative Workflow and Asset Library. 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 Creative Workflow and Asset Library 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 Creative Workflow/Asset Library server to query eCentral for new software updates and automatically download them. After software updates are downloaded, Creative Workflow and Asset Library 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 Creative Workflow and Asset Library 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 Creative Workflow and Asset Library. Any change to this setting takes effect immediately.
Email address for software updates notification	The e-mail address that Creative Workflow and Asset Library notifies when a software update is automatically downloaded from eCentral. This is set during the Creative Workflow and Asset Library 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 Creative Workflow and Asset Library 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 and libraries and render elements when opened in Smart Review. 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 Creative Workflow/Asset Library server (the localhost). Any change to this setting requires a restart of Creative Workflow and Asset Library to take effect.

Color Management

These settings specify the source profiles that are automatically assigned to any untagged CMYK and RGB graphic and image objects in an element when the element is uploaded. For more information, see *Specifying Default Source Profiles* on page 76.

Setting	Description
Paper Background Size	The size of the paper border that appears around a color-managed element when viewing the element in Full Screen mode in Smart Review. You may want to change the size of the border because the white space around the image can affect how the image's colors appear on screen. The default size is **72** points. Any change to this setting takes effect immediately. For more information, see *Setting Smart Review's Paper Size* on page 83.

Setting	Description
CMYK Graphic Default Source Profile	The profile to be assigned by default to any untagged CMYK graphic (vector) objects in an element when the element is uploaded. **Important:** The default selection for the CMYK graphic source profile is **Unassigned**. In most cases we strongly recommend that you leave the selection as **Unassigned**, because assigning a source profile to CMYK graphic objects can degrade performance during rendering of the element in Smart Review, and will alter the interpretation of overprinted process objects, potentially altering the appearance of the element. If no source profile is assigned to an untagged CMYK graphic object when the element is uploaded, Creative Workflow will assume that the object is already in the target CMYK color space. If you need to assign a source profile to the CMYK graphic objects in a specific element, we recommend that you assign the profile manually to that element only, after the element is uploaded. (For instructions, see the Creative Workflow and Asset Library Help.) Any change to this setting takes effect immediately.
CMYK Image Default Source Profile	The profile to be assigned by default to any untagged CMYK image (raster) objects in an element when the element is uploaded. **Note:** The default selection for the CMYK image source profile is **Unassigned**. If no source profile is assigned to an untagged CMYK image object when the element is uploaded, Creative Workflow will assume that the object is already in the target CMYK color space. Any change to this setting takes effect immediately.
RGB Graphic Default Source Profile	The profile to be assigned by default to any untagged RGB graphic (vector) objects in an element when the element is uploaded. **Note:** An RGB object cannot be rendered in Smart Review without using an RGB profile. If no source profile is assigned to an untagged RGB object when the element is uploaded, Creative Workflow will automatically use the Adobe RGB (1998) profile when the object is rendered. Any change to this setting takes effect immediately.
RGB Image Default Source Profile	The profile to be applied by default to any untagged RGB image (raster) objects in an element when the element is uploaded. **Note:** An RGB object cannot be rendered in Smart Review without using an RGB profile. If no source profile is assigned to an untagged RGB object when the element is uploaded, Creative Workflow will automatically use the Adobe RGB (1998) profile when the object is rendered. Any change to this setting takes effect immediately.

Glossary

Asset Library software	Software that enables you and your team to create libraries in which you can store elements for reuse. Formerly known as EyeMedia software.
black point compensation	The process of preserving the shadow details in an image by simulating the full dynamic range of the output device. In Creative Workflow, you can select the **Use black point compensation** option when you create a color target.
caching	The process of creating and storing temporary image data to improve subsequent performance (for example, in Smart Review).
color space	A set of rules and definitions that together describe colors. Examples are CMYK, RGB, CIE L*a*b*, and monochrome. A color space interprets the raw color values in an image to display the image's colors a certain way when the image is viewed on screen or output to a device.
color target	The specifications for displaying an element's colors on a monitor so as to accurately represent what the element will look like when output to a proofer or printed on press.
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. Formerly known as TeamWorks software.
device-independent color space	An intermediate color space such as L*a*b* that is used when converting from one color space to another—for example, from CMYK to RGB.
gamut	The range of colors that can be displayed or output by a given device.
L*a*b* color space	An intermediate color space used when converting from one color space to another (for example, from CMYK to RGB).
Matchprint Virtual technology	Software that enables you to perform color-accurate monitor-proofing on elements in Smart Review.
monitor-proofing	The process of using a computer monitor as a color-accurate proof. The image on the monitor must accurately reflect what it will look like when a proof is made, or when it is printed on press. Also known as *soft proofing* or *virtual proofing*.
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. Formerly known as InSite software.

press profile	A description of the color space of an output device—for example, a printing press. When a color target is applied to an element, the associated press profile converts the element from L*a*b* color space to the CMYK color space that corresponds to your press's available color gamut and specific printing conditions.
proof profile	A description of the color space of a proofing device. When a color target is applied to an element, the associated proof profile ensures that the element's colors displayed on screen accurately represent what the element would look like if output to a specific proofer. Kodak Color Services can provide you with a custom ICC color profile to use as the proof profile.
rendering intent	The method for converting colors from one color space to another and adjusting colors that are out of gamut for the destination device.
right	See *user right*.
role	A collection of *user rights*.
Smart Review	A tool that you can use to open a detailed, full-resolution preview of an element, view the element in different ways, annotate and mark up the element, and chat with others about the element. When Matchprint Virtual software is licensed for your system, you can also use Smart Review to view color-accurate monitor-proofs of elements.
source profile	The specifications for how the CMYK and RGB values in an element file should be interpreted as an actual color when displayed or output through a given device.
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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