



InterAct

Version 5.4r2, September 9, 2015

InPress
Systems 

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CONTENT.....	3
1 ABOUT INTERACT AND THIS MANUAL.....	7
1.1 What does InterAct do?	7
1.2 How can I use InterAct? Some example workflows	9
1.3 Where is InterAct in the user interface?	11
1.4 What do I get with InterAct?	12
1.5 InterAct vs built-in functions of WebNative?	12
1.5.1 Download and conversion of assets	13
1.5.2 Action and triggers.....	13
1.6 What is Tracker?.....	13
2 INSTALLATION.....	14
2.1 Platforms & Pre-requisites	14
2.2 Getting installation packages	14
2.3 Installing the software	14
2.3.1 Uninstalling the software.....	16
2.3.2 Removing old parts of the software	16
2.4 Updating the software.....	16
2.5 Accessing InterAct admin	16
2.6 Licensing	17
2.7 Enabling InterAct plugins in WebNative	17
3 CONFIGURING INTERACT	19
3.1 InterAct admin.....	19
3.2 InterAct base configuration	20
3.3 View Log.....	21
3.3.1 View log vs Using reports.....	22
3.4 User plugin configuration	23
3.4.1 User plugin list	23
3.4.2 Users and Groups in plugin list.....	24
3.4.3 Legacy plugins	25
3.4.4 Adding a new configuration	25
3.4.5 Modifying a configuration	26
3.4.6 Reverting a configuration	26
3.4.7 Back to user or plugin.....	27
3.5 Actions	27
3.5.1 Action: assetlink	27
3.5.2 Action: collect	27
3.5.3 Action: collect_files	28
3.5.4 Action: compressfiles.....	28
3.5.5 Action: deletefiles.....	28
3.5.6 Action: fnrestore	28
3.5.7 Action: mailonly.....	28
3.5.8 Action: movefiles.....	29
3.5.9 Action: sendbasket	29
3.5.10 Action: sendbyftp.....	29
3.5.11 Action: sendlink.....	29
3.5.12 Action: sendmail.....	29
3.5.13 Actions: sitandftp & sitandmove	30
3.5.14 Action: rimage	30
3.5.15 Action: runcustom.....	30
3.6 Actionlists.....	30
3.6.1 Sorting Actionlists	32

CONTENT

3.7	Conversion lists.....	33
3.7.1	Sorting Conversionlists	34
3.8	Additional forms and Form Wizard	34
3.8.1	Using the Form Wizard.....	35
3.8.2	Form Wizard Input elements	36
3.8.3	Form Wizard display elements.....	40
3.8.4	Form Wizard block	41
3.8.5	HTML forms	42
4	CONFIGURING INTERACT PLUGINS	45
4.1	The plugin configuration tabs	45
4.1.1	Base & Action.....	45
4.1.2	Files, Conversion & Access.....	47
4.1.3	Display & Workflow	48
4.1.4	Notification & Reports.....	51
4.1.5	Database	52
4.2	Common Action arguments	54
4.2.1	Specific argument instructions	55
4.2.2	Argument palettes.....	56
4.3	Collaboration plugins	57
4.3.1	InterAct Asset Review	57
4.3.1.1	Setup considerations.....	60
4.3.1.2	Configuration steps.....	60
4.3.1.3	Example - Temporary user mode, Portal server access	61
4.3.2	InterAct Asset Request	70
4.3.2.1	Example: InterAct Asset request	72
4.3.2.2	InterAct Asset request advanced setup.....	74
4.3.3	InterAct Share basket.....	76
4.3.4	InterAct Mail Comment	79
4.3.5	InterAct Approval request	81
4.3.6	InterAct Approval	82
4.3.6.1	Example: InterAct Approval Request and Approval	84
4.4	Asset delivery plugins	88
4.4.1	InterAct Asset Link	88
4.4.1.1	Example: InterAct Asset Link.....	89
4.4.2	InterAct Collect	91
4.4.2.1	Example: InterAct Collect along with Form Wizard, notifications,	92
4.4.3	InterAct Send FTP.....	94
4.4.3.1	Example: InterAct Sendbyftp.....	95
4.4.4	InterAct Download Direct.....	96
4.4.5	InterAct Download FPO Direct.....	98
4.4.6	InterAct Convert Direct.....	98
4.5	Workflow plugins.....	100
4.5.1	InterAct Project Maker	100
4.5.1.1	Project Maker Overview.....	100
4.5.1.2	Default Project Paths and folder names	103
4.5.1.3	Custom Project Paths and folder names.....	104
4.5.1.4	Structures and Dynamic folder names	106
4.5.1.5	Setting Keywords.....	108
4.5.1.6	Project Maker Setup details.....	108
4.5.1.7	Notifications & Jobticket file	110
4.5.1.8	ProjectMaker Additional options.....	112
4.5.1.9	Project Maker GOTO buttons	113
4.5.1.10	Project Maker client database	114

CONTENT

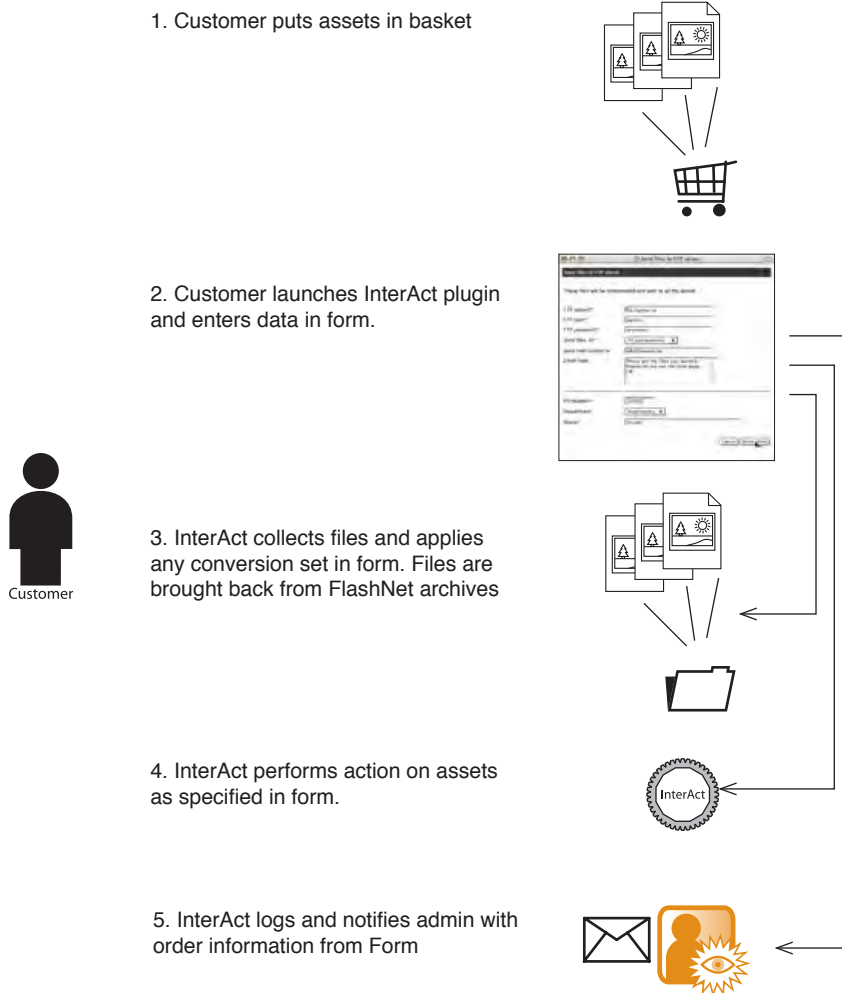
4.5.2	InterAct Move Files	114
4.5.2.1	Move Files using dynamic path	116
4.5.3	InterAct Delete Files	119
4.6	Other plugins.....	119
4.6.1	InterAct Custom Order	119
4.7	InterAct Jobadmin.....	121
4.7.1	Enabling Authorization workflow.....	121
4.7.2	Setting up Jobadmin.....	122
4.7.3	Accessing InterAct Jobadmin	123
4.7.4	Using InterAct Jobadmin	124
4.7.4.1	Approving an order via InterAct Jobadmin	125
4.7.4.2	Rejecting an order via InterAct Jobadmin.....	126
5	NOTIFICATIONS AND REPORTS.....	127
5.1	Notification email structure	127
5.2	Customizing email look and feel	127
5.3	Email template format	128
5.4	Email template content	132
5.5	Reports & Receipts	134
5.6	Reports & Receipts template format.....	134
5.7	Reports & Receipts path and names	135
6	ADVANCED SETUPS	136
6.1	Working with the Venture database	136
6.1.1	Reading from the database.....	136
6.1.2	Making exports from the database	137
6.1.3	Writing to the database.....	138
6.2	Customizing look and feel.....	140
6.2.1	Add an InterAct logo	140
6.2.2	Add an InterAct CSS.....	142
6.2.2.1	InterAct classes	142
6.2.2.1	InterAct CSS file on the WebNative server	143
6.2.2.2	InterAct CSS file on the WebNative Portal server.....	143
6.2.2.3	InterAct CSS file example	144
6.3	Input filters	145
6.4	Date picker	146
6.5	File filters.....	147
6.5.1	File filter rules	148
7	INTEGRATING WITH WEBNATIVE PORTAL	150
7.1	InterAct plugins that require IPIK	150
7.2	InterAct features that require IPIK.....	150
8	INTERACT WEBSERVICES	151
8.1	InterAct WebServices Overview	151
8.1.1	What is a webservice?	151
8.1.2	How can InterAct WebServices be used?.....	151
8.1.3	How does InterAct WebServices work?.....	152
8.2	Adding an InterAct WebService	152
8.2.1	Base & Access	153
8.2.2	Action setup	154
8.2.3	File & Collect	155
8.2.3	Notifications & Reports	155
8.3	InterAct WebService actions	156

8.3.1	WebService: assetLink	156
8.3.2	WebService: makeDirs	156
8.3.3	WebService: projectMaker	156
8.3.5	WebService: setKeywords	157
8.4	Testing an InterAct WebService	157
8.4.1	WebService Example: sendByFTP.....	157
8.5	InterAct WebService response format	162
A	MIGRATING INTERACT.....	163
B	UNIX TIME FORMAT	164
	INPRESS SYSTEMS SOFTWARE LICENSE AND CREDITS	165

1 ABOUT INTERACT AND THIS MANUAL

1.1 What does InterAct do?

InterAct is a WebNative plugin that operates on the basket or on single assets. It collects the files in the basket and performs an action on the files, as specified in the InterAct plugin. The plugin is configured using the InterAct administration utility and can be different for different users or groups.



InterAct workflow

Along with the action setup in the form, additional data such as ordering & shipping information can be collected and passed on via email notification and through logfiles to customer representatives, etc.

Action related information
(configured in action setup)

Order related information
(configured in form wizard)

The screenshot shows a web form titled "Send files to FTP server". It contains the following fields and values:

- FTP address*: ftp.mpsnet.se
- FTP User*: jpruss
- FTP password*: [masked]
- Send files as*: PC compression
- Send notification to: info@mpsnet.se
- Email note: These are the files you wanted. Please let me see the final page. /j
- P.O Number*: 123456
- Department: Engineering
- Name*: Jorgen

Buttons for "Cancel" and "Send goods" are at the bottom right.

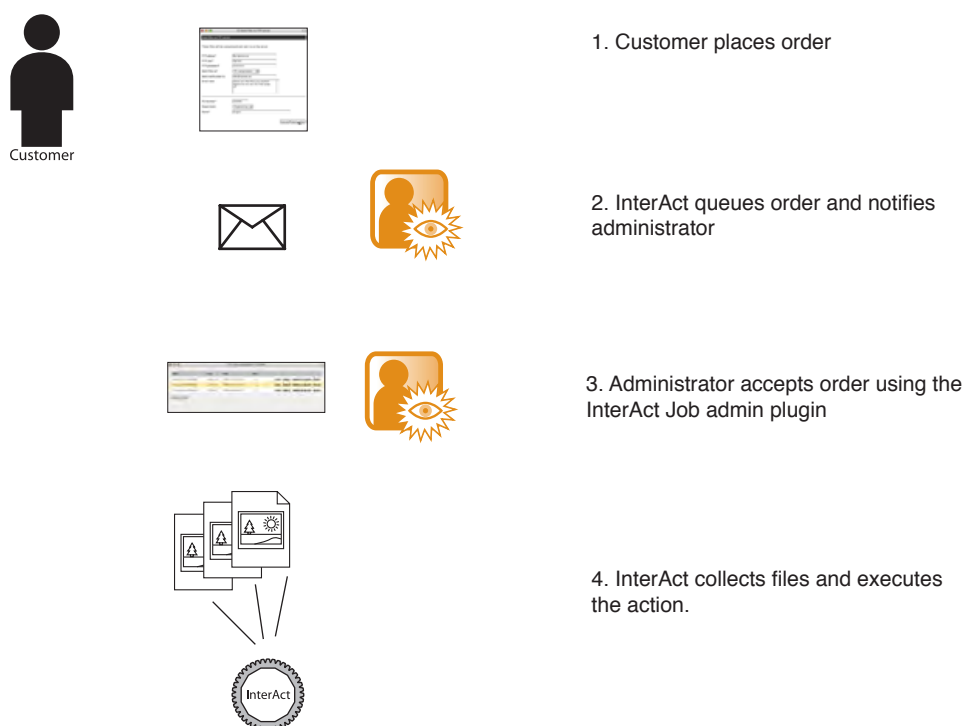
InterAct form: action and order information

InterAct can restore files from FlashNet archives, collect files high res or low res and convert images for different purposes. The collected files can be placed in a specific output folder on the local server, compressed and sent to recipients in several ways or shared with another user as a named basket. Shipping of files can be done by email with attachment, ftp to external server or by email with a download link that will expire after a certain time.

Collection and processing of files is done in the background, utilizing the power of the central server and freeing up wait time for the user. An order can either be processed immediately upon placement or via an authorization step. When placing an order, a notification email is sent to a customer representative who, by using the jobadmin plugin, can view and authorize the order. The jobadmin plugin can be configured to handle orders from only certain user accounts or groups, making it possible to hand out control to external users.



Workflow with no authorization



Workflow with authorization

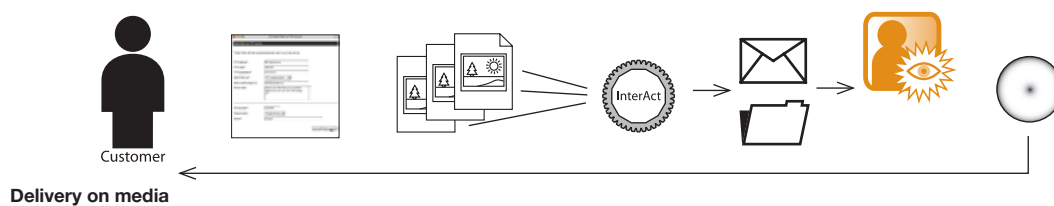
1.2 How can I use InterAct? Some example workflows

InterAct can be used to solve a number of asset fulfillments, delivery, conversion and automation tasks. With a highly customizable interface, it is possible to configure the plugin(s) to handle many different situations. It is even possible to add more instances of InterAct to the basket configuration, create totally customized front ends and add new actions to the back end.

Typical reasons to use InterAct and what functionality InterAct offers in specific situation:

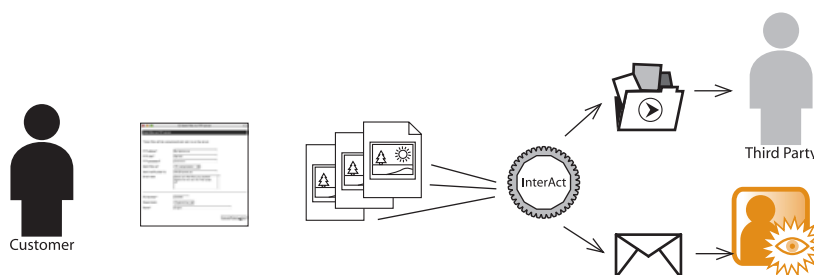
- Customer orders assets that should be delivered on media

The InterAct form collects needed delivery information from the user. The InterAct plugin collects files to a folder that can be copied to media. The form wizard makes it easy to create the unique orderform needed for specific customer/situation. InterAct minimize the work needed to locate and pull together the files the customer needs.



- Customer order assets that are to be transferred to third party

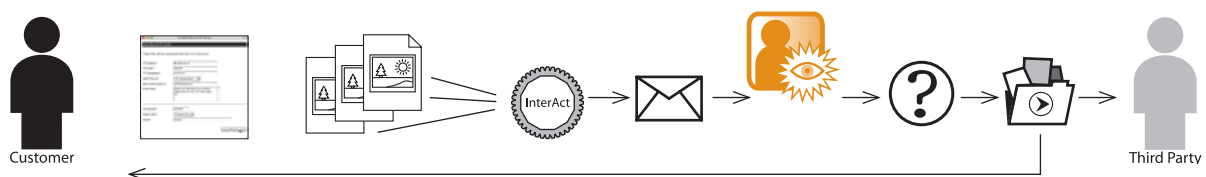
InterAct collects files that are automatically transferred to correct address using an appropriate method. At the same time, required order information is collected and relayed to administrator for invoicing, recordkeeping, etc.



Delivery to third party

- Customer has access to view files but final delivery needs authorization

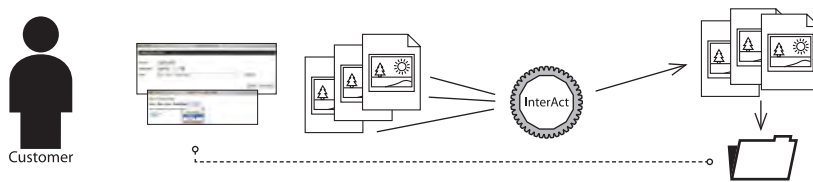
InterAct collects order information and notifies administrator of pending order. Admin uses the job administrator to view and authorize the order, which is collected and automatically transferred to correct address using requested method.



Delivery of files to user or third party after authorization step

- Assets need to be batch copied/moved on the server

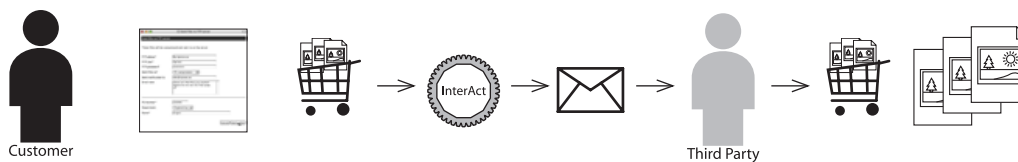
InterAct Move will copy or move all files in the basket to an output directory selected in the easy-to-use browser. Optionally the user can select to create a new folder for the files.



Copying or moving files to a selected folder with optional creation of new subfolder

- Assets need to be shared with another user

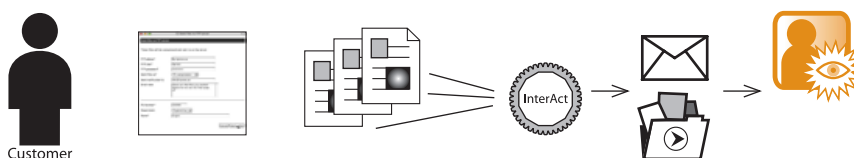
InterAct will copy a current basket to a named basket for another user and send an email note to the user. No assets are being copied only the basket of the assets.



Share a basket of assets and send a notification to user receiving basket

- PDFs need to be accessed and selected for reprint

InterAct will collect the selected pdfs and required order data, and send on to administrator for handling. Simple to use and effective reprint utility.

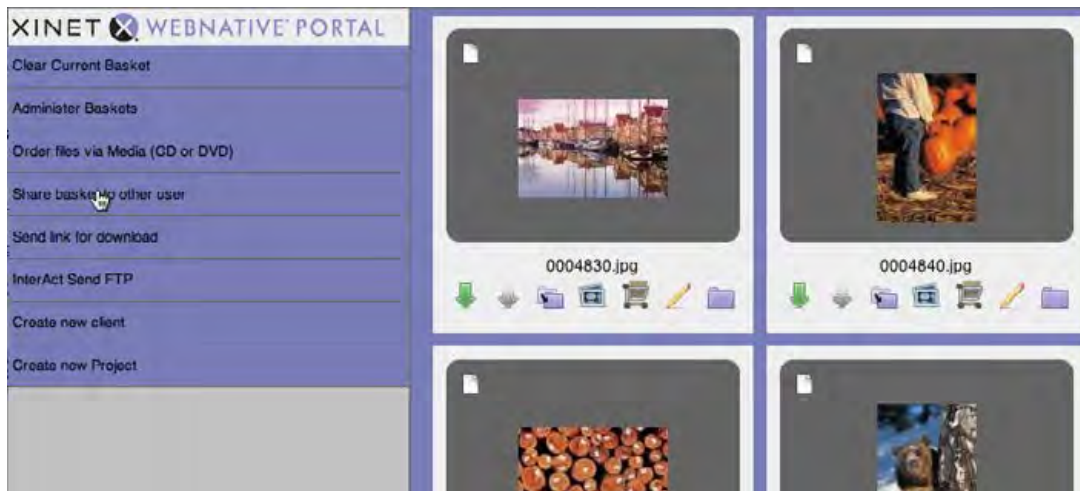


Copy selected PDF's to output directory and mail Print order to Administrator

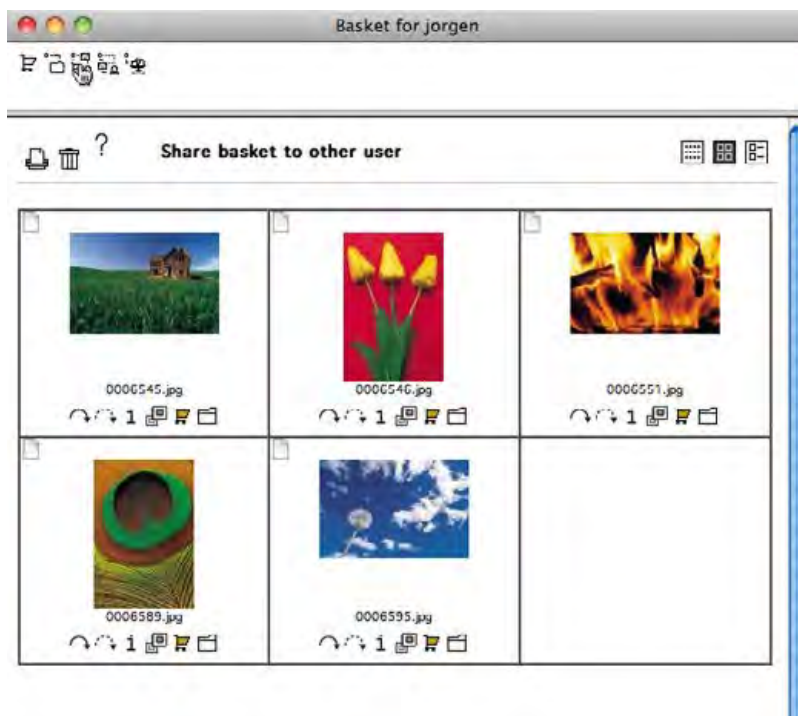
The workflows above are a few examples of what can be accomplished in InterAct. Since the forms, actions and other tools in InterAct are made to be very flexible and easily customizable, a lot of other Asset management and delivery needs can be solved using InterAct together with WebNative and WebNative Venture.

1.3 Where is InterAct in the user interface?

In most scenarios, InterAct will operate on the contents of the current WebNative basket. Therefore, the interface is in the basket plugin section of WebNative, WebNative Portal and InPressive.



Accessing InterAct via basket in Xinet Portal version 4



Accessing InterAct through WebNative house_inpress style

InterAct itself is able to operate on a single asset as well. If the environment is customized, it is possible to add an interact plugin directly on a file.

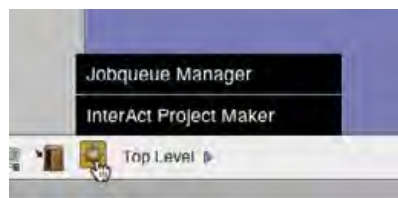


An InterAct button directly on the asset in WebNative house_inpress style

Some of the InterAct plugins do not work on the basket, for example JobAdmin and Project Maker. These plugins will appear in different locations in the different environments and depending on WebNative style used or if using Xinet Portal, whether the InPress Portal integration Kit is being used or not. Plugins that do not operate on the basket or single assets are referred to as “Top Level Plugins”.



Top Level plugins in WebNative house_inpress style



Top Level plugins in WebNative portal version 4 using IPIK

1.4 What do I get with InterAct?

When installed, InterAct will add a number of plugins to the basket config of WebNative. There will be a number of InterAct plugins that do different actions as well as a Job Administration plugin. These plugins can be added to and configured individually on specific users or groups.

In addition to the plugins, InterAct comes with an administration interface.

InterAct is delivered as a number of orderplugins and a job administration plugin. The plugins are divided into the sections: **Collaboration**, **Asset Delivery**, **Workflow** and **Other**.

InterAct Jobadmin is a plugin that is used to control execution of orders passed to an administrator for authorization.

1.5 InterAct vs built-in functions of WebNative?

InterAct does not interfere with, or replace any of the built-in capabilities of WebNative. Although some functionality in InterAct and WebNative may overlap, they complement each other, and together provide a wider range of tools that can be offered to the users of the WebNative site.

In particular, InterAct adds:

- Third party delivery of assets
- Custom collection of asset order information
- Order - request - accept - fulfil type workflows

1.5.1 Download and conversion of assets

All the WebNative functionality related to getting files (high res, low res or converted) from a site are designed to be used as downloads to the users local machine. Access to download functionality is decided on at setup time.

InterAct adds the ability to collect the assets for manual shipping on media as well as distribution to third party using several transfer methods like ftp or E-mails with links to time-limited downloads of archives. In addition, it gives functionality to share assets between users and to deliver assets to third parties which will require no additional setup or login for the person receiving files.

InterAct can also collect associated information from an asset request and forward that information along with the order information as a notification to a customer representative.

InterAct also adds the ability to give access to assets using administrator intervention. An order of assets can initiate a notification to an administrator who will then have the option to release or reject an order.

1.5.2 Action and triggers

WebNative Venture's action and trigger feature is dependent on the database and requires the user to have a license of Venture as well as a database setup that can trigger an event. Events will trigger per file or folder as a user changes an associated database value.

InterAct operates on the Basket collection of files (although it is also possible to use InterAct on files using custom WebNative styles). The InterAct form communicates to the action and will allow the user to interact with the action on a level decided by the administrator. The action can be direct or go via an authorization step.

The administration for InterAct allows for a high degree of customization of the user experience and direct feedback from the interface.

1.6 What is Tracker?

Up until release 3.0 InterAct was called Tracker. At that point the name changed. However, the name Tracker may still show in some cases, like in the button inside nativeadmin, in logfiles and in names on the different components of the product.

The downloaded package (see chapter 2) is named `tra.platform.tar.gz`.

2 INSTALLATION

2.1 Platforms & Pre-requisites

InterAct is available for RedHat Linux, Apple MacOSX and Sun Solaris. The following versions are supported:

- RedHat Linux: 5, 32-bit (for Linux 5, 64-bit with compatibility libs installed)
- RedHat Linux: 6, 64-bit
- Apple OS X Intel 10.5 +
- Sun Sparc-Solaris 10 +

InterAct requires Xinet[®] FullPress[®] and WebNative[®].

InPress Portal Integration Kit (IPIK) is recommended when InterAct is used together with Xinet WebNative Portal. See www.inpress.se for more information regarding IPIK.

The minimum release of InterAct that can run on non-dongle Linux installations is 5.0r1.



IPIK is required for some InterAct functions when accessing via a Portal server

2.2 Getting installation packages

The InterAct software is packaged as a compressed tarfile and can be downloaded from the InPress Systems website: <http://www.inpress.se>

The distribution names reflect the product, version and platform.

For example: **int.5.0.intosx.tar.gz**

int	interact
5.0	version 5.0
intosx	OS X for intel

2.3 Installing the software

Transfer the package in a binary format from the ftp server to the server where it should be installed. Put the file in a temporary location for the installation.

Make sure you are logged in as the root user when performing the installation.

Uncompress by using the gunzip command and untar the installation file.

```
[root@xinet17 /]# cd /root/installs/inpress/int
[root@xinet17 int]# ls
int.5.0.redhat5.tar.gz
[root@xinet17 int]# gunzip int.5.0.redhat5.tar.gz
[root@xinet17 int]# tar xf int.5.0.redhat5.tar
[root@xinet17 int]# ls
installinteract README int.5.0.redhat.tar interactinst
```

There should now be an installation script: **installinteract**.

Note that on OSX Servers you should always unzip and untar using the command line tools. Do not unpack “automatically” when downloading.



Perform the installation while logged in as the root user. Use command line tools.

Run the installation script (example below is during an upgrade):

```
[root@xinet17 int]# ./installinteract
```

This script will install InterAct.

install script version 5.0

use following flags to uninstall

-r to remove old InterAct bits (InCharge, legacy Plugins)

-u to completely unistall InterAct

By installing this software you agree to all the terms and conditions of the InPress Systems Software Licence. The license is included in the manual delivered in printed or electronic form together with the software product. If no manual was included with the software product, please contact InPress Systems before installing the software.

Do you accept the licensing agreement? [y or n]?

y

NOTE: Updating to InterAct version 5.0 from version 4.X requires a new license key.

The new license key will be provided by InPress Systems or your reseller.

A valid maintenacnce contract covering your InterAct license is required.

Do you want to continue the installation [y or n]?

y

Updating existing version of InterAct

Gracefully shutting down InterAct daemon

Waiting...

Waiting...

Waiting...

Installing setting files, forms and styles

Installing programs, actions and plugins

Installing InPress general tools. Shared by InPress products

Updating InPress general tools

Updating tool cgis

Updating include files

/etc/apache2/httpd.conf is an Apache config file with Webnative installed

ipik.apache.conf is installed in the Apache config file

/etc/httpd/httpd.conf exists but has no Webnative installed

Updating WebNative styles

Installation of InPress tools finished

Starting InterAct daemon

Updated basket config. basket.config backup is saved to /usr/tracker/logs/basket.config.backup

install of InterAct version 5.0 finished

setup InterAct for your needs using the InterAct admin utility

login as nativeadmin

```
[root@xinet17 int]#
```

2.3.1 Uninstalling the software

The same installation script can be used to uninstall InterAct. Run the script and use the “-u” flag:

```
[root@xinet17 int]# ./installinteract -u

This script will remove all parts of InterAct.
Do you want to continue the un-installation [y or n]?
...
```

2.3.2 Removing old parts of the software

With version 5, support will be terminated for some old plugins: Job Creator, Client Creator, Broadcaster, Sendlink and Lightbox. These plugins are replaced with newer options but are still active if so desired. They are not installed if version 5 is installed on a new fresh install, but will be there (and updated) in case there is an old installation on the server. To remove the plugins, use the installation script with the “-r” flag.

The same applies to the InCharge add-on. The functionality will no longer be supported. Updated binaries will be installed if InCharge is installed on the server. To remove the plugins related to InCharge, use the installation script with the “-r” flag.

```
[root@xinet17 int]# ./installinteract -r

This script will remove all non-current parts of InterAct: InCharge, Legacy
Plugins, etc
Do you want to continue the [y or n]?
...
```

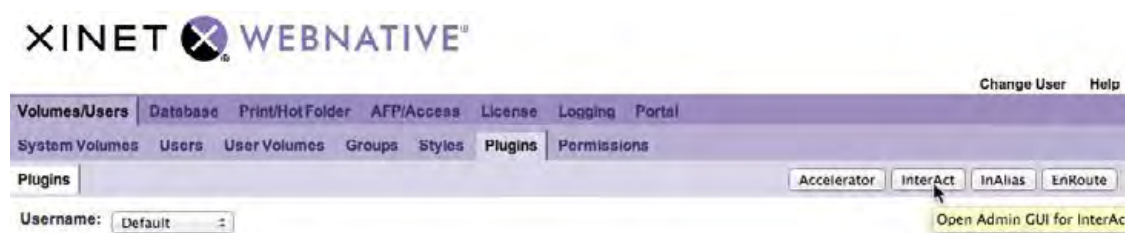
2.4 Updating the software

The installation script is designed to handle both original and update installations of existing InterAct software. To update an existing installation, just run the *installinteract* script as in 2.3. All existing configurations will be preserved.

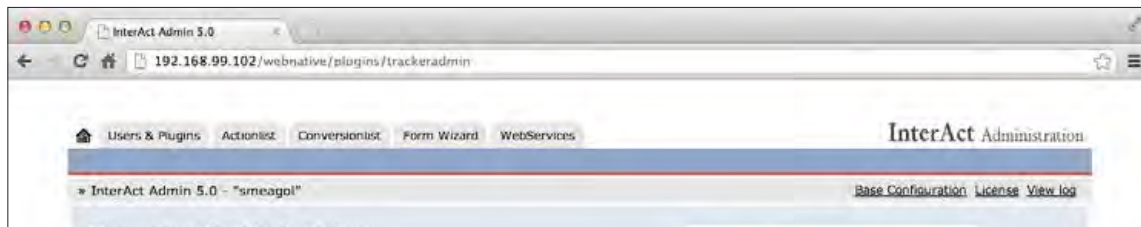
2.5 Accessing InterAct admin

InterAct Administration is a plugin (accessed from WebNative admin) that is used to setup the different plugins for any user or group. In the admin it is also possible to build reusable conversion, action and form setups. The interface can be accessed via the nativeadmin user from the User -> Plugins tab or by typing in the address to the plugin in a browser:

<http://SERVER/webnative/plugins/trackeradmin>



Access the InterAct admin utility from the InterAct plugin in Xinet's nativeadmin : Plugin tab



Access the InterAct admin utility from the url <http://SERVERURL/webnative/plugins>

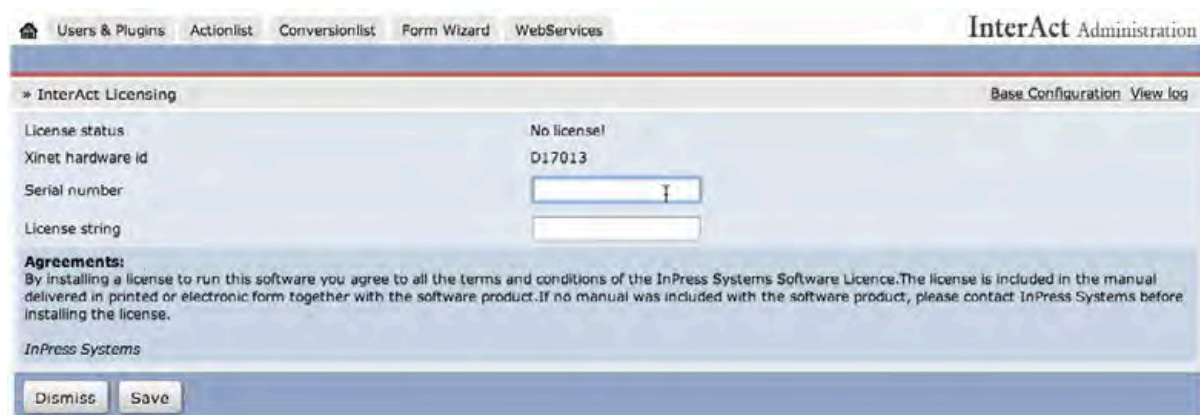
2.6 Licensing

InterAct needs a 16 digit license string and a 4 digit serial number provided by InPress Systems or a reseller. The license and serial number should both be entered in the licensing section of the InterAct admin.

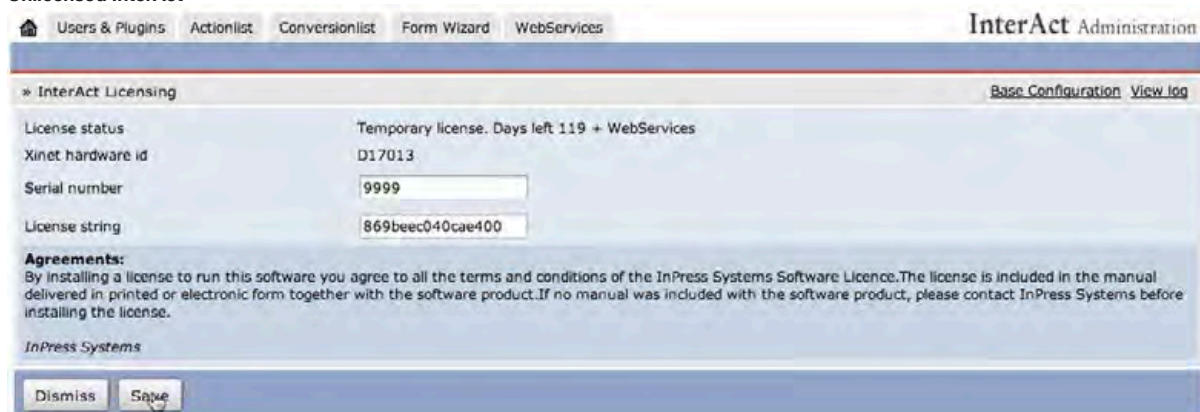
To be able to provide a license, the Hardware ID of the server is needed. It is displayed above the entries for serial number and license string in the licensing section.



Access the Licensing section from the License link



Unlicensed InterAct



License and serial number have been added and saved

2.7 Enabling InterAct plugins in WebNative

Each InterAct plugin needs to be enabled on a user or a group in the WebNative nativeadmin plugins tab. Enabling an InterAct plugin in WebNative only gives access to the plugin. It also has to be configured in the InterAct admin interface, See chapter 3.

Change User Help

Volumes/Users Database Print/Hot Folder AFP/Access License Logging Portal

System Volumes Users User Volumes Groups Styles Plugins Permissions

Plugins Tracker Accelerator

Username: jorgen

Primary Group: accgrp

Plugins	Setting
Administer Baskets	default (on) on off
Download Archive of Files	default (off) on off
Download Archive of FPOs	default (off) on off
InterAct Custom Order	default (off) on off
InterAct Collect	default (off) on off
InterAct Share Basket	default (off) on off
InterAct Send MailLink	default (off) on off
InterAct Send FTP	default (off) on off
InterAct Move Files	default (off) on off
InterAct Broadcaster	default (off) on off
InterAct Lightbox	default (off) on off
InterAct Client Creator	default (off) on off
InterAct Project Creator	default (off) on off
InterAct Mail Comment	default (off) on off
InterAct Delete Files	default (off) on off
InterAct Approval Request	default (off) on off
InterAct Approval	default (off) on off
InterAct Download Direct	default (off) on off
InterAct Download FPO Direct	default (off) on off
InterAct Convert Direct	default (off) on off
InterAct Jobadmin	default (off) on off
Accelerator	default (off) on off
Accelerator aCat	default (off) on off

Submit

the Xinet standard plugins

Enable or disable
InterAct plugins
here
Works on single
users or groups

InterAct plugins

Xinet nativeadmin plugins control for a user

3 CONFIGURING INTERACT

Once an InterAct plugin has been enabled on a user or group via the Xinet nativeadmin, it has to be configured in the InterAct admin.

This chapter describes basic configuration of InterAct as well as the configuration options common to all the different InterAct plugins. Chapter 4 deals with each plugin individually.

3.1 InterAct admin

As seen previously, the InterAct admin can be accessed via a button on the plugins tab of the Xinet admin tool.



Open InterAct admin from the plugin page

It is also possible to access the admin through the URL:

<http://SERVERADDRESS/webnative/plugins/trackeradmin>

In order to access InterAct admin, you need to be logged in as **nativeadmin**.

The InterAct admin is divided into five main sections: **Users & Plugins**, **Actionlists**, **Conversionlists**, **Form Wizard** and **WebServices**. In addition to the sections, there are three links in the startup page: **Base Configuration**, **License** and **View Log**.



InterAct Admin with section tabs at top and links to the top right

SECTION	DESCRIPTION
Users & Plugins	Configure specific plugins on users and groups
Actionlist	Create lists of actions to be used in the InterAct Custom Plugin
Conversionlists	Create lists of predefined conversion options to be applied to images
Form Wizard	Create forms that can be added to specific user/group plugin setups to collect additional information.
WebServices	Configure and administer WebServices (requires WebService license)
Configuration	Base and default setups for InterAct
License	Administrate the InterAct license
View log	Search and view Interact log

3.2 InterAct base configuration

The base configuration page is used to setup some basic configuration options.

The screenshot shows the 'InterAct Administration' interface. The top navigation bar includes links for Users & Plugins, Actionlist, Conversionlist, Form Wizard, and WebServices. The main content area is titled 'Configure InterAct Base Settings' and includes a 'License View log' link. The configuration options are as follows:

- Debug:** A toggle switch set to 'On'.
- Mail address for fatal errors:** A text field containing 'admin@inpress.se'.
- Mailsender:** A text field containing 'info@inpress.se'.
- Run an email test:** A button to test email functionality.
- ICC directory:** A text field containing '/usr/tracker/setup/iccprofiles'.
- Downloads directory (/usr/tracker/downloads):** A text field containing '/FPVOLS/INT/DOWN'.
- Custom date 1 (%Y-%m-%d = 2011-01-31):** A text field.
- Custom date 2 (%b %d, %Y = Jan 31, 2011):** A text field.
- Custom date 3 (%d/%m/%Y = 31/01/2011):** A text field.
- Database retries (5 times):** A numeric input field set to '10'.
- Database wait time (2 seconds):** A numeric input field.

At the bottom of the form are buttons for 'Dismiss', 'Save', 'Back to "jorgen"', and 'Back to "jorgen" : "InterAct Asset Request"'.

Base configuration

SETUP	DESCRIPTION
Debug	Turn on debug to increase the level of information in the detailed log
Mail address for fatal errors	Mail adress that will receive emails if a fatal error occurs: action or trdispatch errors out without recovery.
Mailsender	Mail reply-to (and failure) address on emails sent from InterAct. A local reply-to can be assigned using a form attached to the plugin. The form field that will be used to set the mailsender has to have the name MAILSENDER .
Run email test	Use this link to run an email test. This is to verify that email sending works and can send to a certain email address. Clicking the link will open a new window where an email can be entered. An email will be sent to the address and the window will then show the local verbose feedback from the mailsender on the server.
ICC Directory	Type in a path where ICC profiles to be used for conversion and conversionlists reside. NOTE that InterAct does not automatically pick up the location from the Xinet server. The default is /usr/tracker/setup/iccprofiles
Downloads directory	Path to a location where downloadable files are (temporarily) saved. Defaults to /usr/tracker/downloads
Timeout	The InterAct temp files are automatically cleaned. The timeout is the minimum number of hours to keep any temp file before it is deleted

SETUP	DESCRIPTION
Custom Date 1,2,3	Dates are available for emails and reports. The standard date is of the format Tue Feb 10 2012, 13:43:01 . It is possible to add three Custom dates using standard date formatting. Defaults are %Y-%m-%d (ex. 2011-01-31), %b %d, %Y (ex. jan 31, 2011) and %d/%m/%Y (ex. 31/01/2011).
Database Retry	InterAct will in some cases set database values in the Xinet Venture database. This setting will control how many times it tries to connect before giving up. Default is 5
Database Wait time	InterAct will in some cases set database values in the Xinet Venture database. This will control how many seconds to wait between each try. Default is 2 seconds.

3.3 View Log

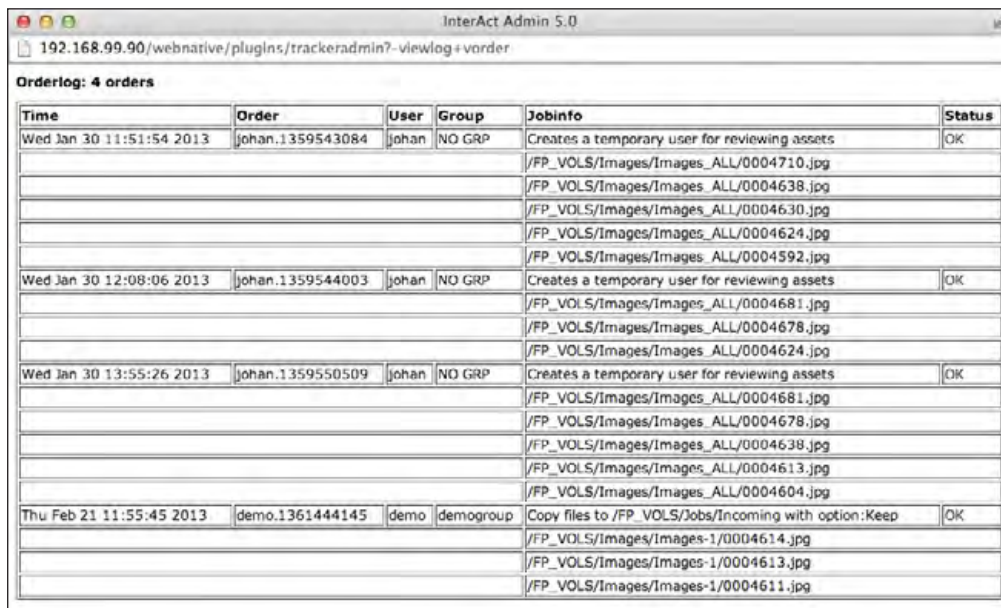
The view log page has options to view the cleaning log, daemon log and the orderlog. From the orderlog, it is possible to view the details of a certain order.

To view the cleaning or daemon logs, just click the corresponding View button. A new window will open, displaying the log.

Overview over log options

Result from view cleaning log

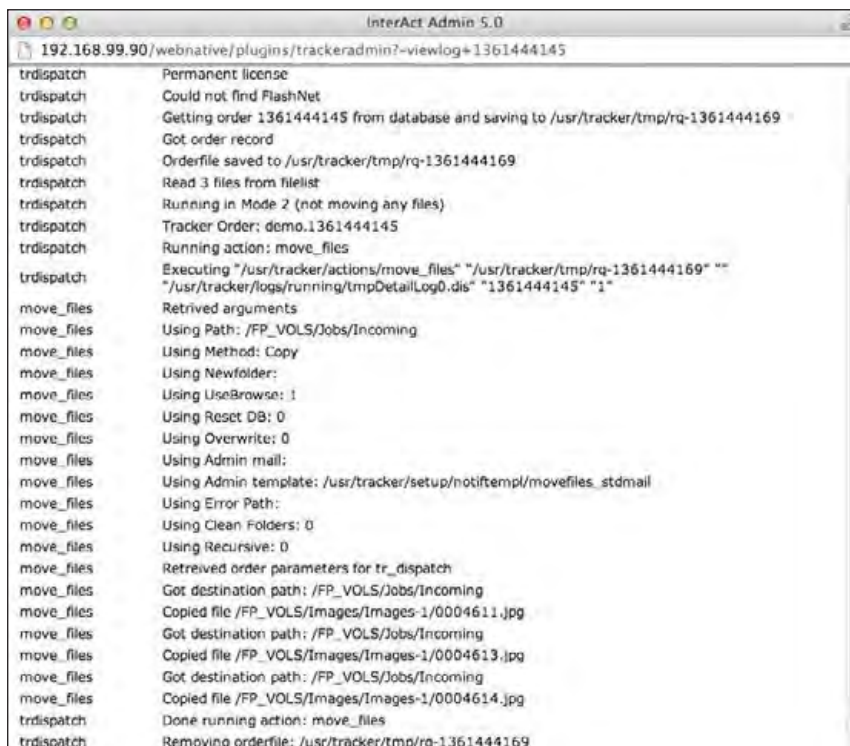
To view the orderlog, select a user to search for and a time span, then click the associated view button. It is also possible to email the log instead of viewing it in a window.



Time	Order	User	Group	Jobinfo	Status
Wed Jan 30 11:51:54 2013	johan.1359543084	johan	NO GRP	Creates a temporary user for reviewing assets	OK
				/FP_VOLS/Images/Images_ALL/0004710.jpg	
				/FP_VOLS/Images/Images_ALL/0004638.jpg	
				/FP_VOLS/Images/Images_ALL/0004630.jpg	
				/FP_VOLS/Images/Images_ALL/0004624.jpg	
				/FP_VOLS/Images/Images_ALL/0004592.jpg	
Wed Jan 30 12:08:06 2013	johan.1359544003	johan	NO GRP	Creates a temporary user for reviewing assets	OK
				/FP_VOLS/Images/Images_ALL/0004681.jpg	
				/FP_VOLS/Images/Images_ALL/0004678.jpg	
				/FP_VOLS/Images/Images_ALL/0004624.jpg	
Wed Jan 30 13:55:26 2013	johan.1359550509	johan	NO GRP	Creates a temporary user for reviewing assets	OK
				/FP_VOLS/Images/Images_ALL/0004681.jpg	
				/FP_VOLS/Images/Images_ALL/0004678.jpg	
				/FP_VOLS/Images/Images_ALL/0004638.jpg	
				/FP_VOLS/Images/Images_ALL/0004613.jpg	
				/FP_VOLS/Images/Images_ALL/0004604.jpg	
Thu Feb 21 11:55:45 2013	demo.1361444145	demo	demogroup	Copy files to /FP_VOLS/Jobs/Incoming with option:Keep	OK
				/FP_VOLS/Images/Images-1/0004614.jpg	
				/FP_VOLS/Images/Images-1/0004613.jpg	
				/FP_VOLS/Images/Images-1/0004611.jpg	

Result from view orderlog

To the right of the status on the right hand side are links to get more info on the order as well as to download detailed information of the order. The detailed file has all information no matter how the “debug” option is set under base configurations.



```

InterAct Admin 5.0
192.168.99.90/webnative/plugins/trackeradmin?-viewlog+1361444145

trdispatch Permanent license
trdispatch Could not find FlashNet
trdispatch Getting order 1361444145 from database and saving to /usr/tracker/tmp/rq-1361444169
trdispatch Got order record
trdispatch Orderfile saved to /usr/tracker/tmp/rq-1361444169
trdispatch Read 3 files from filelist
trdispatch Running in Mode 2 (not moving any files)
trdispatch Tracker Order: demo.1361444145
trdispatch Running action: move_files
trdispatch Executing "/usr/tracker/actions/move_files" "/usr/tracker/tmp/rq-1361444169" ""
"/usr/tracker/logs/running/tmpDetailLog0.dis" "1361444145" "1"

move_files Retrived arguments
move_files Using Path: /FP_VOLS/Jobs/Incoming
move_files Using Method: Copy
move_files Using Newfolder:
move_files Using UseBrowse: 1
move_files Using Reset DB: 0
move_files Using Overwrite: 0
move_files Using Admin mail:
move_files Using Admin template: /usr/tracker/setup/notiftempl/movefiles_stdmail
move_files Using Error Path:
move_files Using Clean Folders: 0
move_files Using Recursive: 0
move_files Retrived order parameters for tr_dispatch
move_files Got destination path: /FP_VOLS/Jobs/Incoming
move_files Copied file /FP_VOLS/Images/Images-1/0004611.jpg
move_files Got destination path: /FP_VOLS/Jobs/Incoming
move_files Copied file /FP_VOLS/Images/Images-1/0004613.jpg
move_files Got destination path: /FP_VOLS/Jobs/Incoming
move_files Copied file /FP_VOLS/Images/Images-1/0004614.jpg
trdispatch Done running action: move_files
trdispatch Removing orderfile: /usr/tracker/tmp/rq-1361444169

```

Result from viewing details of order by clicking status text

3.3.1 View log vs Using reports

On each plugin setup there is an ability to run reports. These reports use a wide scale of data and a report template to generate a custom report for the plugin. This type of report is created on the fly when orders are processed and independent of this orderlog. See 5.5 for more information.

3.4 User plugin configuration

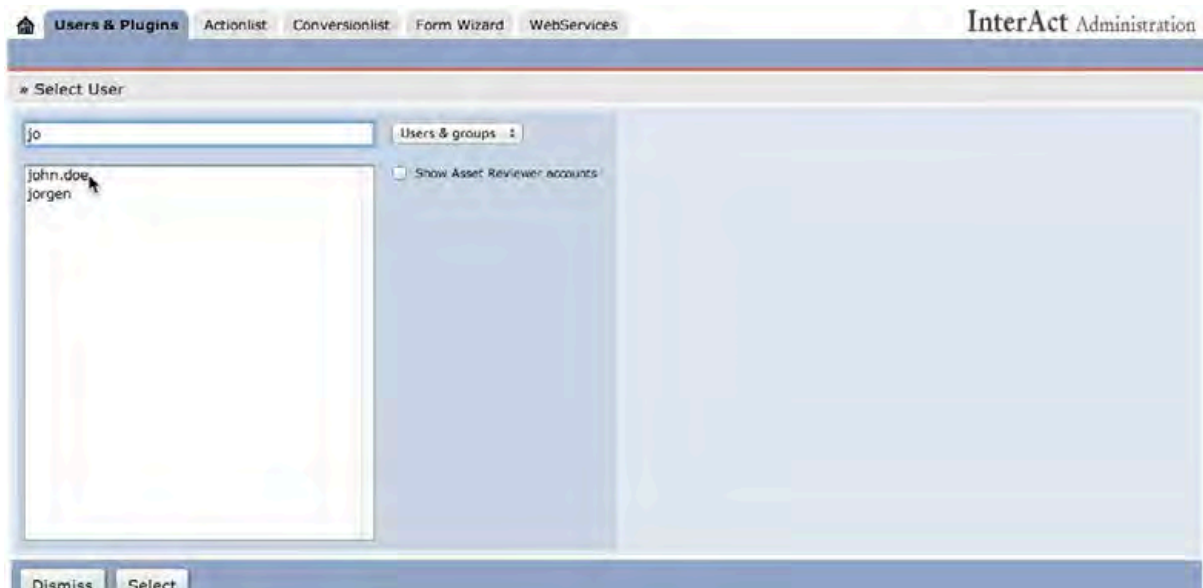
An InterAct plugin can be configured on a user account or a group. Any user that has a primary group will be able to read the configuration from the primary group. If there is a user configuration on the same user, it will be used instead of any primary group configuration. There is no “merging” of setups between user and group.



A user configuration always overrides a group configuration

Step 1 is to select the user or group to work on. Click the Users tab and InterAct will show a scrollable select list with all WebNative users and/or groups. Scroll and select the user or group to configure and click the Select button.

Use the top input field to type in a text that is used to filter out certain users/groups from the list and select to show only users, groups or both.



Selecting a user by typing in “jo” to filter the users, selecting a user by clicking the “Select” button

3.4.1 User plugin list

When a WebNative user or group has been selected, an overview page will be shown. The overview page lists all the InterAct plugins from the system and show what plugins are enabled for the user from nativeadmin and out of those, which ones have been configured or not.

A plugin that has not been enabled for the user/group will display a link where to enable the plugin. This link will open up nativeadmin on the right plugins page in a new tab/window.

If the plugin is enabled it may have a **Configure** button to create a new configuration or a **Modify** and **Revert** button if there is a configuration currently saved to the user.



InterAct plugin overview page with plugins listed. Some are enabled and some are configured

3.4.2 Users and Groups in plugin list

InterAct is able to read its plugin configurations for a certain user from the user account or from the associated primary group account. It does not matter whether the plugin was enabled on the primary group or the user in nativeadmin.

InterAct will always check for the corresponding configuration for the user and then for the primary group in that order. If it finds a user configuration it will ignore any primary group configuration on the same plugin.

This means that an administrator has to be careful when setting up group permissions and configurations. If it is desired to share the same configuration for all primary members of a group, it is important to NOT make a user setup on the same plugin.

The Plugin list page in InterAct admin will show some extra information and give some extra options when a user is a primary member of a group. In the list below, some plugins are enabled on the primary group (demogroup) and some on the user (john.doe).

When there is a configuration made on the group, and another made on the user for the same plugin (like on Asset Link), there will be links to modify the group config and to revert to the group config. The revert function is the same as the revert on the user, which will remove the user config.

When there is a configuration made on the group, but none on the user for the same plugin (like on Download Direct), there will be a link to modify the group config.

If there is no configuration made on the primary group but the plugin itself turned on, the config for the user will not show any group related options.

InterAct Administration

Users & Plugins | Actionlist | Conversionlist | Form Wizard | WebServices

Select plugin to administrate for "john.doe"

Category	Plugin Name	Description	Enable for john.doe	Enable for demogroup	Action
Collaboration	InterAct Asset Review	Creates a temporary account for basket conten...			Configure
	InterAct Share Basket	Share a basket with one or more users			Configure
	InterAct Mail Comment	Send a mail including comments, keywords and ...	Enable for john.doe	Enable for demogroup	Configure
	InterAct Approval Request	Send requests to be handled by InterAct Appro...	Enable for john.doe	Enable for demogroup	Configure
	InterAct Approval	Approve or reject assets	Enable for john.doe	Enable for demogroup	Configure
File delivery	InterAct Asset Link	Creates a zipped archive of the assets and se...	Configure group	Revert to Group	Modify Revert
	InterAct Collect	Collect files into a folder and place in loca...			Modify Revert
	InterAct Send FTP	Transfer zipped archive of assets via ftp and...			Modify Revert
	InterAct Download Direct	Download zipped archive of collected/converte...			Modify Revert
	InterAct Download FPO Direct	Download zipped archive of fpos from assets	Enable for john.doe	Enable for demogroup	Configure
Workflow	InterAct Convert Direct	Download zipped archive of converted assets			Configure
	InterAct Project Maker	Create Project folders using a Client databas...			Modify Revert
	InterAct Move Files	Move or copy all files in basket.			Configure
Other	InterAct Delete Files	Permanently delete all files selected in bask...	Enable for john.doe	Enable for demogroup	Configure
	InterAct Jobadmin	Administrate the job authorization queue	Enable for john.doe	Enable for demogroup	Configure
	InterAct Custom Order	InterAct Custom plugin. Select action or acti...	Enable for john.doe	Enable for demogroup	Configure

Dismiss | Back to "john.doe" | Back to "demogroup" : "InterAct Asset Link"

Listing of plugins show group related information if the user is a primary member of a group

3.4.3 Legacy plugins

Depending on whether version 5 has been installed clean or on top of an older installation, there may be sections for "Legacy" and "InCharge" plugins. If the server has these plugins and they are not in use, it is possible to remove them using the method described in section 2.3.2. Note that InCharge plugins and settings will only show if there is a license for InCharge. However, unwanted plugins may be shown on the WebNative plugin page.



It is possible to remove Legacy and InCharge plugins if not used.

InterAct Administration

Users & Plugins | Actionlist | Conversionlist | Form Wizard | WebServices

Legacy

Plugin Name	Description	Enable for jorgen	Action
InterAct Custom Order	InterAct Custom plugin. Select action or acti...	Enable for jorgen	Configure
InterAct Broadcaster		Enable for jorgen	Configure
InterAct Lightbox		Enable for jorgen	Configure
InterAct Send Mailink			Modify Revert
InterAct Client Creator		Enable for jorgen	Configure
InterAct Project Creator		Enable for jorgen	Configure

Legacy plugins may show when upgrading from versions of InterAct prior to 5.

3.4.4 Adding a new configuration

To configure a plugin for the first time, make sure it is enabled for the user or group on the main WebNative plugin page, then click the Configure button in InterAct admin. The first screen will allow the administrator to start the configuration process from scratch or by copying an existing configuration from another user or group.

InterAct Administration

Users & Plugins | Actionlist | Conversionlist | Form Wizard | WebServices

Modify "john.doe" - "InterAct Asset Link"

Copy settings from:

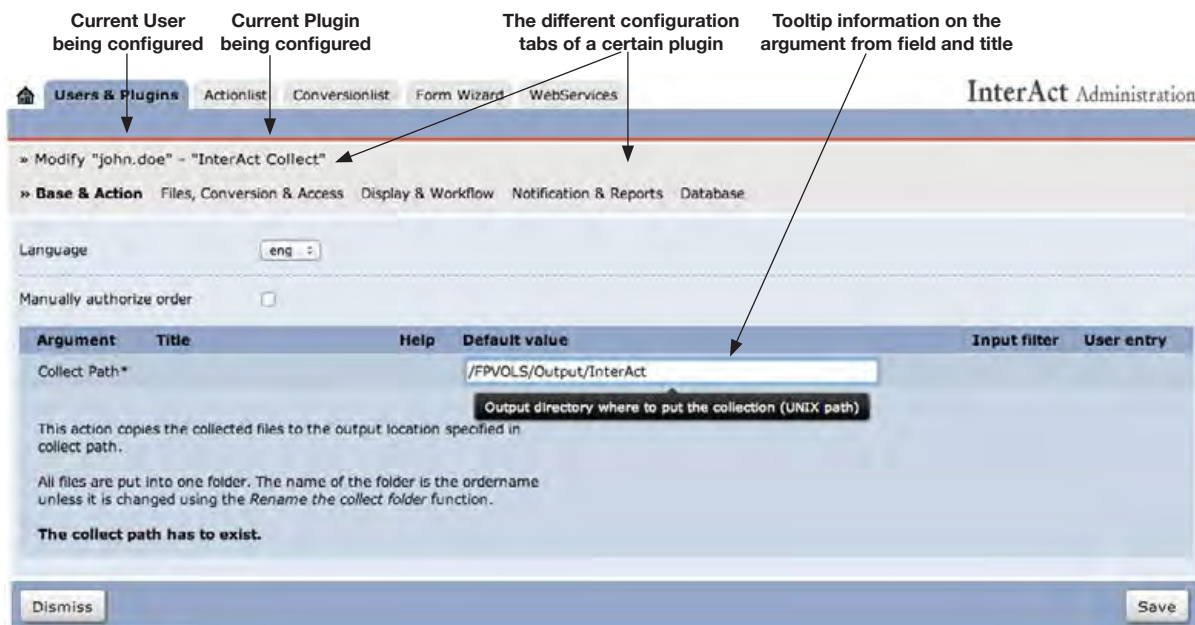
Start with default setting jorgen

Dismiss | Create

Adding a new configuration.

3.4.5 Modifying a configuration

To modify a plugin configuration, click the Modify button in InterAct admin. The main InterAct plugin configuration wizard will be shown. The wizard is similar for all plugins except for the InterAct Jobadmin, and is made up of a maximum of 5 steps: **Base & Action**, **Files**, **Conversion & Access**, **Display & Workflow**, **Notification & Reports** and **Database**. See section 4 for detailed descriptions.

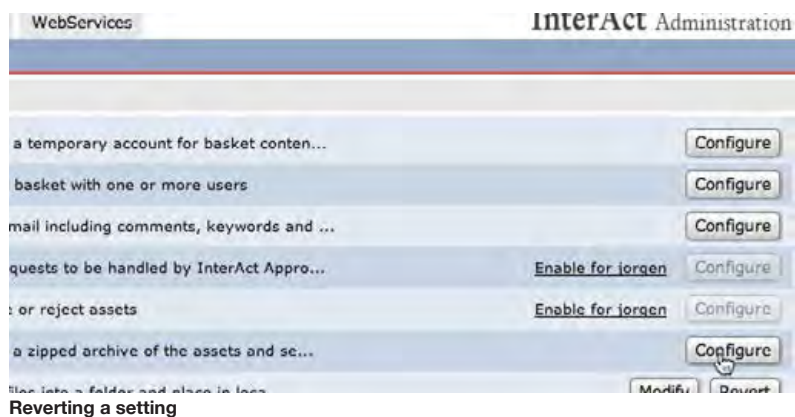


Overview of Plugin configuration tabs and options. The tooltip can also be seen when hovering over the argument name.

3.4.6 Reverting a configuration

If the plugin is enabled and has a current configuration saved to the user, it is possible to reset the current configuration. The Revert button will cause InterAct admin to reset the setup into a “blank” status to start the configuration over again. In reality it will delete the corresponding configuration file inside the user’s subfolder in /var/adm/webnative/.



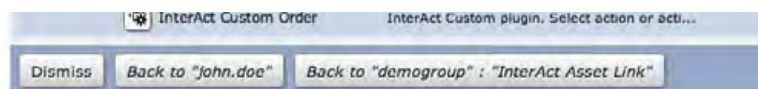


3.4.7 Back to user or plugin

The InterAct admin remembers the last user/group page viewed and the last plugin viewed. In many of the pages it will display quick links back to these at the bottom of the page:



New in Version 5!



Use the "back to" buttons to quickly go back to last user/group or plugin

3.5 Actions

InterAct can apply a number of actions on the collected assets. All actions are listed with a brief description in this section. Those that are *not* available as stand-alone plugins will be reviewed in detail. The actions that are available as standalone plugins are discussed in detail in the respective section.

3.5.1 Action: assetlink

assetlink copies all files in an order to a folder named as the ordername (user.confirmation number). The folder will then be compressed to a zip or sit archive and saved to a temporary location. An email is sent to a recipient with a link for download. The link is timed and can be protected by an optional password.

See Standalone plugin 4.4.1

3.5.2 Action: collect

collect copies all files in an order to a folder named as the ordername (user.confirmation number). This folder will then be moved to a predefined path as setup in the argument list. The path argument has to be entered by the administrator and cannot be passed to the user.

See Standalone plugin 4.4.2

Note: All the files in the order will be copied to a temporary folder location, which means that they will lose any Venture metadata when copied.

3.5.3 Action: collect_files

collect_files is an action that will take all files in an order and copy them to a predefined path. All files will be put directly in the path with no enclosing folder. The path argument has to be entered by the administrator and cannot be passed to the user.

Note: All the files in the order will be copied to a temporary folder location, which means that they will lose any Venture metadata when copied.

SETUP	NOTES	DESCRIPTION
Path	Required	Path where to put the output folder with the collected files

3.5.4 Action: compressfiles

compressfiles takes all files in an order and copies them to a folder named as the ordername (user.confirmation number). The enclosing folder is then compressed into an archive (sit or zip) and then moved to a predefined path. The path argument has to be entered by the administrator and cannot be passed to the user.

SETUP	NOTES	DESCRIPTION
Path	Required	Path where to put the output folder with the collected files
Compression method	Required Can be passed to user	Zip, MacZip or Sit. Defaults to sit

3.5.5 Action: deletefiles

deletefiles deletes the selected files.

See Standalone plugin 4.5.3

3.5.6 Action: fnrestore

fnrestore is used when a “request and authorize” workflow is desired when restoring archived files from flashnet. The action does not do anything except signal InterAct to just do the restore and not collect the files. Files are restored to their original location. No arguments are expected for this action.

Note: InterAct will always restore files from FlashNet archives. When using this action, restore will be done to the files’ original locations.

3.5.7 Action: mailonly

mailonly will collect information about the files and send an email including the comments.

The email is sent to an email address supplied by the user in the form. If no subject or message is set, default texts will be used.

See Standalone plugin 4.3.3.

3.5.8 Action: movefiles

Movefiles either moves or copies the selected files to a new location. The move/copy is performed whilst keeping any Venture metadata.

The method (move/copy) as well as what to do with any duplicates encountered when moving to the output path, is decided by arguments to the action. New path and an optional new folder to put the files in are also decided by arguments. All arguments can be passed to the user.

See Standalone plugin 4.5.2.

3.5.9 Action: sendbasket

sendbasket copies the current basket to a new user or users and saves it under a selected name. An optional email notification is also sent to a specified email receiver with a message that can be typed into the form.

See Standalone plugin 4.3.2.

Note: No files are moved or copied. Only the basket is passed.

3.5.10 Action: sendbyftp

sendbyftp take all files in an order and copy them to a folder named as the ordername (user. confirmation number). The enclosing folder is then compressed into an archive (sit or zip) and transferred to an external ftp site. An optional email notification is also sent to a specified email receiver with a message that can be typed into the form.

FTP address, user, password and compression method has to be entered by the administrator or user. An optional remote directory can also be supplied.

See Standalone plugin 4.4.3.

3.5.11 Action: sendlink

This action is no longer supported and has been replaced by the AssetLink plugin/action.

3.5.12 Action: sendmail

sendmail will collect and compress the collected files as a zip- or sit-file and send an email including the compressed file as an attachment.

The email is sent to an email address supplied by the user in the form. If no subject or message is set, default texts will be used.

SETUP	NOTES	DESCRIPTION
Compression method	Can be passed to user	Zip, MacZip or Sit. Defaults to sit
E-mail	Required Can be passed to user	Email where to send notification and attachment
E-mail Subject	Can be passed to user	Subject line in pickup email

SETUP	NOTES	DESCRIPTION
E-Mail template		Uses the sendmail_stdmail template Path to a specific template can be given here
E-mail message	Can be passed to user	Message in email

3.5.13 Actions: sitandftp & sitandmove

These actions are no longer supported.

3.5.14 Action: rimage

The Rimage action is an action that makes it possible to use the WebNative Basket to feed the series of Rimage CD burners. The Rimage action serves the files to Rimage as well as providing data to be included in the label being printed on the CD.

See documentation for InterAct version 4.1.

3.5.15 Action: runcustom

The runcustom action will run a custom script that is placed in /usr/tracker/bin/custom. The script can be run on the basketfile or on each file inside the basket.

SETUP	NOTES	DESCRIPTION
Custom Program	Required	Name of script to run. Is assumed to be in /usr/tracker/bin/custom Note that the script has to be executable
Mode to run custom program on	Required Can be passed to user	Mode in which to execute the program. Execute on basketfile - action will pass the path to a file containing all the files in the basket. Execute on basket contents - action will run the program individually on each file/directory in the basket. Execute recursively on basket contents - action will run the program individually on each file in the basket. If a directory is found in the basket, it will be scanned for files and the program run on each file.
Argument 1-5 for custom program	Can be passed to user	Arguments 2-6 for the custom program. First argument will be filepath

3.6 Actionlists

When using the InterAct Custom Order plugin, one option is to use an actionlist. An actionlist is a list of predefined actions with associated names that a user can select from.

Note: An actionlist does not execute all actions in a list, only the selected action.

Actionlists are created using the Actionlist tab or by selecting the Add new actionlist option in the action select on the Plugin setup's base tab.

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

■ Modify & Add Actionlists Add actionlist

default.eng	Modify	Delete
default.fn.eng	Modify	Delete
default.fn.swe	Modify	Delete
default.swe	Modify	Delete

Dismiss Back to user/group

Add new actionlist from the Actionlist tab

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

■ Modify "jorgen" - "InterAct Custom Order" 1. Base 2. Display 3. Notification & Reports 4. Conversions 5. User 6. Database

Style: default

Language: eng

Manually authorize order

Rename the the collected files

Rename the folder enclosing the collected files

Supply extensions on collect

Action: [edit]

Dismiss Save Save and Proceed >

- ACTIONS -
- collect
- collect_files
- compressfiles
- delete_files
- fnrestore
- mailonly
- move_files
- null
- rimage
- runcustom
- sendbasket
- sendhyftp
- sendlink
- sendmail
- sitandftp
- sitandmove
- ACTIONLISTS -
- default.eng
- default.fn.eng
- default.fn.swe
- default.swe
- Add new actionlist

Add new actionlist from base configuration tab on plugin setup

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

■ Add actionlist

Name of new actionlist: My_Action_list

Copy actionlist: --None--

Dismiss Save

Name the actionlist

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

■ Select actionline from actionlist "My_Action_list" Add actionline

No actions defined

Dismiss Save

Start adding lines on the list

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

■ Add actionline for actionlist "My_Action_list"

Popup title: Make CD

Action: collect [?]

Collect Path*: /FP_VOLS/noWeb/TRA_Collect/CDs

Dismiss Save

Each line is a complete action setup

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

Select actionline from actionlist "My_Action_list" [Add actionline](#)

Popup title	Action	Action argument	
1 Make CD	collect	/FP_VOLS/noWeb/TRA_Collect/CDs	Modify Delete
2 Send to Main FTP	sendbyftp	ftp.inpress.se; myftpuser; apasswordgoeshere; /temp; Z...	Modify Delete
3 Images to website	collect_files	/mounts/www/imagedump	Modify Delete

Dismiss Save

The list is made up of several complete actions with custom names

Then select the actionlist from the plugin setup and the interface will show the options as a select of multiple actions.

Supply extensions on collect

Action My_Action_list [Edit]

Dismiss Save Save and Proceed >

Select actionlist on the base configuration tab

My Custom order

Ordertype*

Customize images:

Cancel Send order

Make CD
Send to Main FTP
Images to website

Resulting InterAct orderform

3.6.1 Sorting Actionlists

The display order of the options in an actionlist can be changed from the interface by displaying a list by clicking on the name or the modify button, retyping the numbers in the fields to the left, specifying the order and clicking the save button.

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

Select actionline from actionlist "My_Action_list" [Add actionline](#)

Popup title	Action	Action argument	
3 Make CD	collect	/FP_VOLS/noWeb/TRA_Collect/CDs	Modify Delete
1 Send to Main FTP	sendbyftp	ftp.inpress.se; myftpuser; apasswordgoeshere; /temp; Z...	Modify Delete
2 Images to website	collect_files	/mounts/www/imagedump	Modify Delete

Dismiss Save

Edit the order and save ...

Sorted actions...

InterAct Administration

■ Select actionline from actionlist "My_Action_list" [Add actionline](#)

	Popup title	Action	Action argument	
1	Send to Main FTP	sendbyftp	ftp.inpress.se; myftpuser; apasswordgoeshere; /temp; Z...	Modify Delete
2	Images to website	collect_files	/mounts/www/imagetump	Modify Delete
3	Make CD	collect	/FP_VOLS/noWeb/TRA_Collect/CDs	Modify Delete

[Dismiss](#) [Save](#)

... Sorted

3.7 Conversion lists

When collecting files InterAct has the ability to collect High Res files, FPO (For placement Only) files or converted files.

Conversion options can either be displayed as "Full" meaning that the user can combine all the different conversion options by himself or as a Selection of predefined formats: Conversionlist.

See 4.1.2 for more information.

A conversion list can be added from the plugin configuration's **Conversions** tab when selecting a conversion list or by using the **Conversionlist** main tab and the **Add conversionlist** link.

InterAct Administration

■ Modify "Jorgen" - "InterAct Send Maillink"

1. Base 2. Display 3. Notification & Reports 4. **Conversions** 5. User 6. Database

[Conversion](#) [edit]

☒ CONVERSIONS
☐ Full
☐ - CONVERSIONLISTS -
☐ default.eng
☐ default.swe

[Dismiss](#) [Save](#) [Save and Proceed »](#)

Using the "Add new conversionlist" selection when choosing conversion

InterAct Administration

■ Modify & Add Conversionlists [Add conversionlist](#)

default.eng	Modify Delete
default.swe	Modify Delete

[Dismiss](#) [Back to user/group](#)

Using the "Add conversionlist" link on the "Conversions" tab

InterAct Administration

■ Add conversionlist

Name of new conversionlist

Copy conversionlist

[Dismiss](#) [Save](#)

Choosing a name for the list

InterAct Administration

USERS ACTIONLIST **CONVERSIONLIST** FORM WIZARD

■ Select conversionline for conversionlist "My Conversions" [Add conversionline](#)

No conversions defined!

InterAct Administration

Users & Plugins Actionlist **Conversionlist** Form Wizard WebServices

» Add conversionline for conversionlist "My Conversions"

Popup title:

ICC profile:

Resolution:

Format:

USM:

Scaling: Width x Height Pad:

Clipping path:

InterAct Administration

Users & Plugins Actionlist **Conversionlist** Form Wizard WebServices

» Select conversionline for conversionlist "My Conversions" [Add conversionline](#)

	Popup title	ICC profile	Rend	Resolution	Format	Scaling	Width	Height	Pad	Clipping path	USM	
1	Web thumbnails	sRGB	Perc.	72	png	in	3	3	Fill	Deactivate		<input type="button" value="Modify"/> <input type="button" value="Delete"/>
2	Web Product images	sRGB	Perc.	72	jpg65	px	500	500	Fill	Deactivate		<input type="button" value="Modify"/> <input type="button" value="Delete"/>
3	Digital Print	Offset	Perc.	150	jpg90							<input type="button" value="Modify"/> <input type="button" value="Delete"/>

Adding named options to the list

Send link for download

E-mail:

E-mail subject:

E-mail message:

Customize images:

- ☒ Web thumbnails
- ☐ Web Product images
- ☐ Digital Print

Using the conversionlist on the Sendlink plugin

3.7.1 Sorting Conversionlists

The display order of the options in a conversionlist can be changed by retyping the numbers in the fields to the left in the listing, specifying the order and clicking the save button. See 3.6.1, Sorting Actionlists.

3.8 Additional forms and Form Wizard

When InterAct displays the main arguments for the plugin's action or the actionlist (when using the Custom Order plugin) it can also include an additional form that contains custom input

A form can either be created using the Form Wizard or be a custom html form that is saved to InterAct and selected from the plugin setup.

The InterAct form wizard is a web based tool to create forms that can be selected from the InterAct admin interface. A form wizard form is saved and can be used for multiple plugins across different users/groups.



It is possible to add a new form from the Plugin Display tab

Edit an existing form from the Form Wizard tab or by clicking the “Edit” link in the user setup next to the selected form.

Type in the new form name, a comment and optionally select an existing form to copy.

The screenshot shows the 'Form Wizard' tab in the InterAct Administration interface. The main content area has a light blue background and contains the text: » Preview of form "My_Additional_fields" and » This is a fw form for demo[Edit]. Below this, it says 'No fields defined'. A 'Dismiss' button is located at the bottom left. On the right side, a dropdown menu is open, showing a list of form elements: Block, Break row, Checkbox, Date, Hidden field, Horizontal ruler, IFrame, Image, Popup, Textarea, Textfield, and Title/Comment. The 'Add form element' button is highlighted in blue at the top of the dropdown.

After selecting an element, define the element and “Submit changes” to save the new field. In the upper right corner, another pulldown menu is displayed which can be used to select the point where the field is inserted into the form. The default position is at the bottom of the form.

Fields can be rearranged afterwards by dragging and dropping using the arrow symbol to the left of a field. Drag and drop to rearrange and then click the save button to save the changes.



Input information and select where to place the new element in the form.

The inputs needed for a field are different depending on what type of element was created.

3.8.2 Form Wizard Input elements

Following elements collect or silently pass data: **Textfield**, **Checkbox**, **Date**, **Popup**, **Tree Popup**, **Textarea** and **Hidden field**. For any administrator used to HTML forms, these correspond to elements found in those type of forms. The tree popup is a “navigator” using a string of popups to drill down a specific tree of selections where one selection give the next choice etc.

Some of the form element attributes are used on several types of elements: **Element Title**, **Element Name**, **Default value** **Tooltip Text** and **Input Filter**.



Editing a form element.



The resulting textfield with a tooltip

The **Element Title** is only displayed in the resulting form and is not recognized by the back end processes. For most elements the Title is displayed to the left of the field. When using repeated fields (see below) it may be displayed above the field.

The **Element Name** is what can be seen in email notifications and reports. It can also be used to access the values when creating custom emails and reports. The name is also important when using form values to control InterAct workflow.

The **Default value** is displayed as a pre-entered default when the form is loaded. Default values can be hard coded or can be of the [user.ATTRIBUTE] type like in the main InterAct form. Attributes can be **name**, **group**, **address**, **admmail**, **rcpmail**, **xin_email** or **xin_uplemail**.

If the user has been added to Xinet through InAlias the info from the InAlias database can be called upon using the form [user.ina_ATTRIBUTE] where ATTRIBUTE is a data field collected via InAlias. As an example, to get the sitename you would use: [user.ina_sitename].

For the **Hidden field** type, the **Default value** is the *value passed via the element*. As the name Hidden implies, the user will not see the value or the name.

The **Tooltip Text** is an instruction that will show when entering or selecting data. It can also be shown when hovering over the Element title.

Input Filters can be applied to textfields. The content will be checked and corrected by the filter when a change is made. See section 6.3 for more information about input filters.

In addition to the above fields, there are several formatting attributes like **width**, **height**, **max characters**, **readonly** and **required** that can be set on the fields. A required setting will prohibit the user from submitting the order unless a value is entered/selected for the required field.

For the **Popup** type there are two specific values that need to be configured: **Popup Values** and **Popup Titles**. These entries expect values to be used for the popup Titles (seen) and Values (used) listed separated by the pipe character "|". The Titles may be left empty if the titles and values are the same. In that case, the values inserted in **Popup Values** will be used both for display and input.

InterAct Administration

USERS ACTIONLIST CONVERSIONLIST FORM WIZARD

■ Edit element for form "My additional fields"

Element Title: A popup from values

Element Name: POPFROMVALS

Default Value:

Popup Values: Sweden|Germany|France|United Kingdom|United States

Popup Titles: Sweden|Germany|France|UK|USA

Multiple lines: ☐

Required: ☐

Dismiss Save

Creating a select (popup) as a form wizard field using different content for titles and values



The resulting popup

In order to get an empty selection option, start with the “|” character.

Popup Values: |Sweden|Germany|France|UK|USA

Popup Titles: |Sweden|Germany|France|United Kingdom|United States



As an alternative to typing in the selections in the interface, it is possible to call on predefined pulldowns that have been saved to files. A pulldown file is a tab-separated file that has the title to display in the first column and the matching data in the second column. The file needs to be saved to the InterAct setup directory’s **popups** folder: **/usr/tracker/setup/popups**.

In the setup, a leading “|” character is means that the popup values/titles should be read from a file. The filename (following the / character) needs to be entered instead of the list of values/titles. Values will be read from the first column of the file and titles from the second. Note that using files follow the same rules as when using typed in values and titles: If only values are specified they will be used as both values and titles. To get an empty selection when using a file it is important to enter the word “none” as content.

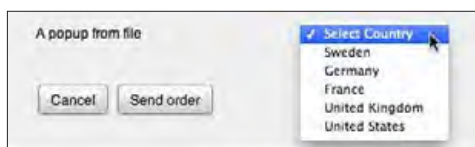
Example: Following file is saved to the directory popups, using the name “Countries”. The word “<TAB>” is printed for illustrative purposes. In the file it is a real TAB character

```
Select Country <TAB> none
Sweden <TAB> Sweden
Germany <TAB> Germany
France <TAB> France
United Kingdom <TAB> UK
United States <TAB> USA
```



Enter filename twice to use different columns for values and titles

Creating a select (popup) as a form wizard field pointing to files for both the Values and Titles.



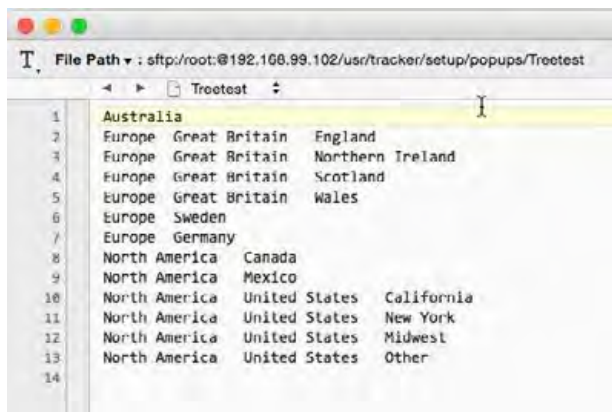
The resulting popup

A third way to generate popups (selects) is to use system-generated arrays. This can be done in the same manner as for arguments (see 4.2.1). Use the square brackets “[“ and “]” to generate an automatic popup. Insert the type of select to generate inside the brackets, ie: [groups:mygroup]

Following system generated popups can be created:

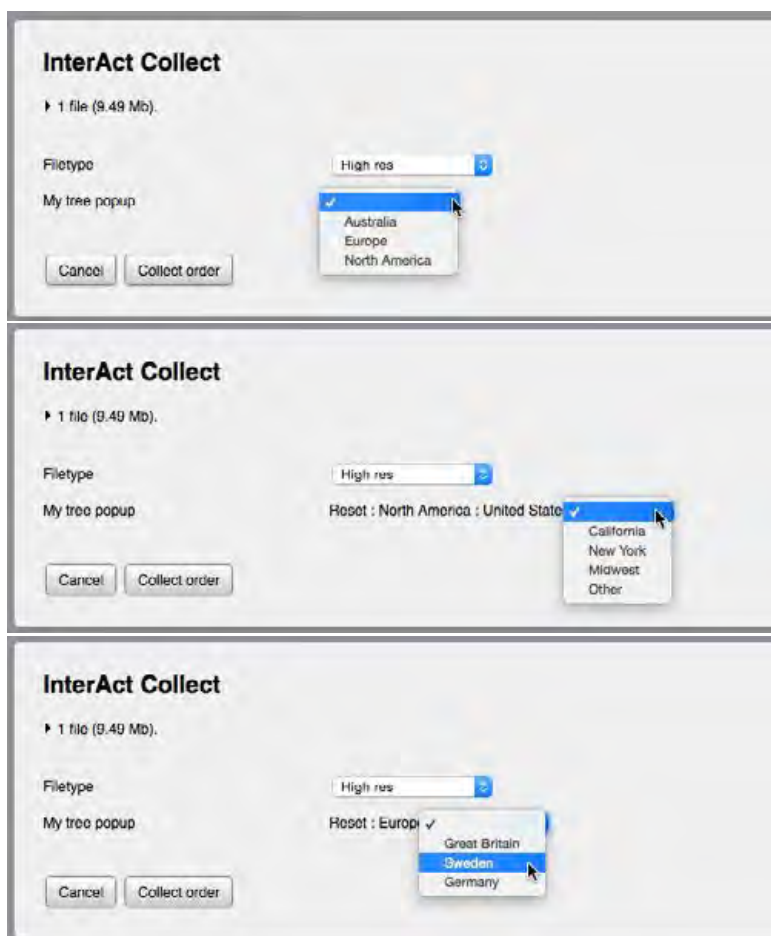
INSTRUCTION	DESCRIPTION
[group:GROUP1,GROUP2]	Read all the usernames from the named WebNative groups GROUP1 and GROUP2 and build a select. List several groups separated by comma.
[groupemails:GROUP1,GROUP2]	Read all the emails of the users from the named WebNative groups GROUP1 and GROUP2 and build a select. If there is no email address present on the user, the username will be checked. If it has a @ character in the name, it will be treated as an email. List several groups separated by comma.
[emailanduser] [userandemail]	Variants of the above in which the title show the email and the value is username (emailanduser) and vice versa (userandemail)
[keywordpop:keywordname]	Build a select from popup options defined for a keyword.
[keywordcurrent:keywordname]	Build a select from all the current values in a keyword.
[inaliasusers:SITE1,SITE2]	Read all the user names from the named InAlias sites and build a select. List several sites separated by comma.
[inaliasemails:SITE1,SITE2]	Read all the email addresses from the named InAlias sites and build a select. List several sites separated by comma.
[struct:PATH:OPTS]	Read all files/directories within a certain path and present as options. OPTIONS is optional and can either be the word files or dirs to restrict to only show files or dirs. Only first level of folder is shown. Example: [struct:/FPVOLS/Clients:dirs] would present a popup consisting of all folders within the directory /FPVOLS/Clients.

A **tree-popup** creates a “navigation” type of interface that allows for drilling down a selection tree. This is always based on a file. The file is organized into levels (columns) and rows. The file needs to be saved to the InterAct setup directory’s **popups** folder: **/usr/tracker/setup/popups**. The Treetest sample file ships with InterAct and looks like this:



Treetest sample file showing a tree. There are three main branches with different lengths

It generates a string of popups that can be selected to drill down. The branches can have different length. The final result posted to the form can either be the full branch with all selections or just the final point.



Navigating in a Tree popup

3.8.3 Form Wizard display elements

Following elements are used for formatting: **Break row**, **Horizontal ruler**, **Title/Comment** and **Image**. The simplest of the control/display elements: **Break row**, **Horizontal ruler**, **Title/Comment** insert a blank line, a horizontal ruler line and a title/comment text respectively.

The **image** can be used to include a logo or illustration in the form. The Image source to the image is the weblurl and the info is the text displayed when hovering over the image. If specifying a link url, the image will act as a button opening a new window to the url. It is possible to add link options as well if using a link. The options correspond to the options available for the window.open() javascript function.

3.8.4 Form Wizard block

The **Block** element is used to display elements horizontally as opposed to the normal vertical listing. This function is particularly useful in conjunction with the repeat for every job option. It is possible to add fields that will repeat for every file in the current InterAct order and thereby create an order form for collecting job related data like quantity and job comment.

First add the block marker and then the fields to be used within the block. There are options for placing the titles above or next to the fields, whether to have a title for the block or not and to control the widths of the rows or not. The repeated title can be set to the names of the assets in the basket. The text ASSETNAME will be substituted with the real filename when the form is created.

The screenshot shows the 'Form Wizard' tab in the 'InterAct Administration' interface. The title bar reads '» Edit element for form "PO-Sample"'. The configuration is as follows:

Field	Value
Type	Block
Number of fields in block	3
Width of the fields (optional, commaseparated)	
Print field title next to input field	<input type="checkbox"/>
Place block to left in form (no Left titles)	<input type="checkbox"/>
Element Title	Order Information
Repeat block for every Asset in order	<input checked="" type="checkbox"/>
Repeated title (ASSETNAME will be substituted for actual name)	ASSETNAME

At the bottom are 'Dismiss' and 'Save' buttons.

Make a block element with 3 fields. Repeat for assets (files) and use real Assetname (filename) as title.

The screenshot shows the 'Form Wizard' tab. The title bar reads '» Edit element for form "PO-Sample"'. The configuration is as follows:

Field	Value
Type	Popup
Element Title	Quantity
Element Name	QUANTITY
Default Value	1
Tooltip Text	
Popup Values	1 2 3 4 5
Popup Titles	
Required	<input type="checkbox"/>

At the bottom are 'Dismiss' and 'Save' buttons. An 'Insert at bottom' button is visible in the top right corner.

The screenshot shows the 'Form Wizard' tab. The title bar reads '» Edit element for form "PO-Sample"'. The configuration is as follows:

Field	Value
Type	Popup
Element Title	Material
Element Name	MATERIAL
Default Value	
Tooltip Text	
Popup Values	Plain Canvas Canvas Framed
Popup Titles	
Required	<input type="checkbox"/>

At the bottom are 'Dismiss' and 'Save' buttons. An 'Insert at bottom' button is visible in the top right corner.

Create the three elements to be used within the block. In this case, a popup for quantity, a popup for material and a text-field for comment.

Preview of the block. To modify or delete a field in a block, use the buttons below the element.

The form as it would be seen from the user when three files are in the basket and the Action has no form arguments

3.8.5 HTML forms

As an alternative to using the Form Wizard, it is possible to use a standard html file as the form. The form file should be saved into a subfolder (inputforms) in the InterAct setup directory (/usr/tracker/setup). The "inputforms" subfolder may have to be created.

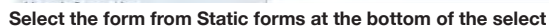
The form file should be a standard HTML formatted page but a few things need to be considered since the page is included as a part of the InterAct generated page:

- InterAct will include the fields in the file “as is” after the normal fields created by the InterAct action and other options.

```
<!-- need to have a table to conform to the structure -->  
<!-- use cellpadding 4, width of 230px on first column, trheight 30px to create the same look and feel as main form -->  
  
<table border="0" cellpadding="4" cellspacing="0" width="100%" class="mainFrameTable">  
  <tr height='30px'>  
    <td width='230px'>  
      <label class="int_label">How will the images be used:</label>  
    </td>  
    <td>  
      <input name="Ad" id="Adcb" type="checkbox" value=""><label for="Adcb" class="int_label">Ad</label>  
      <input name="Brochure" id="Brochurecb" type="checkbox" value=""><label for="Brochurecb" class="int_label">Brochure</label>  
      <input name="Catalogue" id="Cataloguecb" type="checkbox" value=""><label for="Cataloguecb" class="int_label">Catalogue</label>  
      <input name="Other" id="Othercb" type="checkbox" value=""><label for="Othercb" class="int_label">Other</label>  
    </td></tr>  
  
  <tr height='30px'>  
    <td colspan="2">  
      <label class="int_label">Time period during which assets will be used:</label>  
    </td></tr>  
  
  <tr height='30px'>  
    <td>  
      <label for="StartDate" class="int_label">&nbsp;&nbsp;&nbsp;&Start Date (yyyy-mm-dd):</label>  
    </td>  
    <td>  
      <input name="StartDate" id="StartDate" type="text" size="25" class="textField">  
    </td></tr>  
  
  <tr height='30px'>  
    <td>  
      <label for="EndDate" class="int_label">&nbsp;&nbsp;&nbsp;&End Date (yyyy-mm-dd):</label>  
    </td>  
    <td>  
      <input name="EndDate" id="EndDate" type="text" size="25" class="textField">  
    </td></tr>  
  
  <tr height='30px'>  
    <td colspan="2">&nbsp;&nbsp;&</td></tr> <!-- to get some space to buttons -->  
</table>
```

I

The file can be selected att the bottom of the Additional Form select:



43

InterAct Asset Link

3 files (0.17 Mb).

Access code

Expiry time*

Compression method*

E mail

How will the images be used: ☐ Ad ☐ Brochure ☐ Catalogue ☐ Other

Time period during which assets will be used:

Start Date (yyyy-mm-dd):

End Date (yyyy-mm-dd):

Final InterAct form

4 CONFIGURING INTERACT PLUGINS

All the plugins except two, Custom Order and Jobadmin, are configured in the same manner, using the same type of “wizard” when going through the different configuration steps.

The **InterAct Custom Order** plugin is different from the other plugins since it has the ability to work with either a single action or a list of actions. The base config step will adapt to the action that is selected.

The **InterAct Jobadmin** is different since it's built to manage orders rather than place orders and has a different method of configuration.

This section will review the common tabs for all plugins as well as each plugin with its specific arguments and any other setup that may be needed.

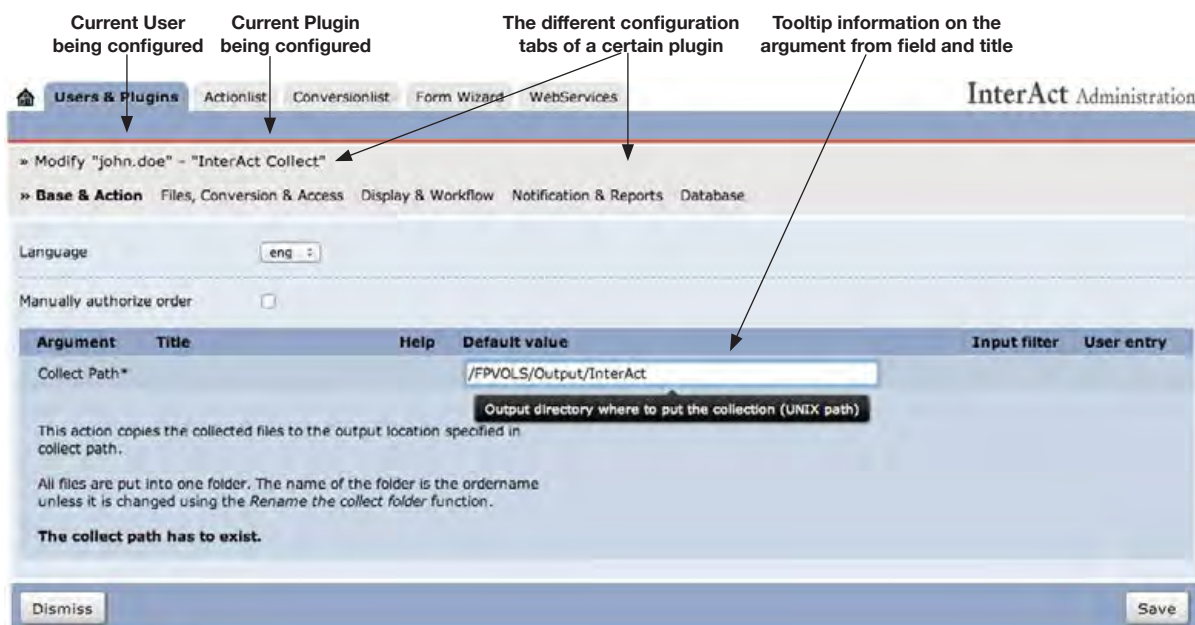
4.1 The plugin configuration tabs

The main InterAct plugin configuration wizard will be shown after going through step one of the configuration or when modifying an existing plugin. The wizard is similar for all plugins except for the InterAct Jobadmin, and is made up of a maximum of 5 steps: **Base & Action**, **Files, Conversion & Access**, **Display & Workflow**, **Notification & Reports** and **Database**.

Depending on what plugin is being configured, there may be fewer options on certain tabs. In some cases this causes the tab to be taken out completely. The number of options available depends on the action that is being used in the plugin. Since the plugin InterAct Custom Order has no predefined action, instead it lets you build selections of actions or select a single action, all the options will be shown. Note that some of the options on InterAct Custom Order may be available for configuration, but depending on final action may not be able to be used.

TIP!

When working with the Custom Order plugin, make sure that options will work when using the selected action



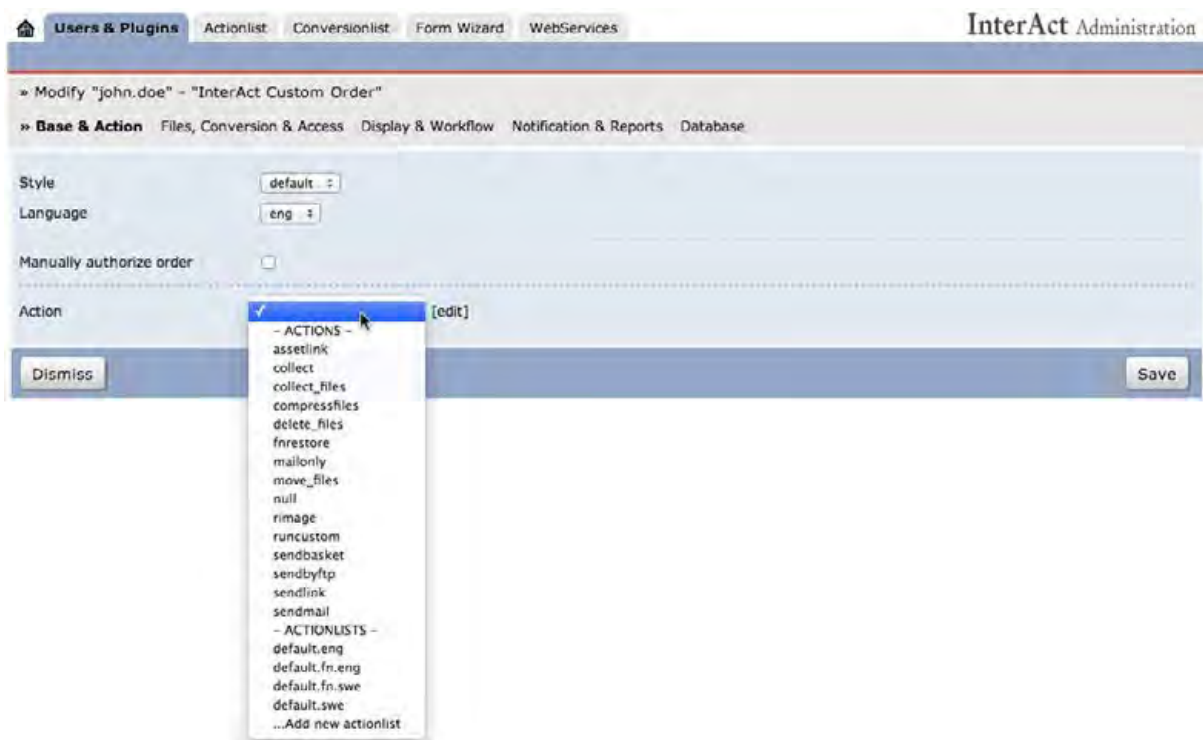
Overview of Plugin configuration tabs and options. The tooltip can also be seen when hovering over the argument name.

4.1.1 Base & Action

The base tab contains setups for Action & arguments, style, language and manual authorization.

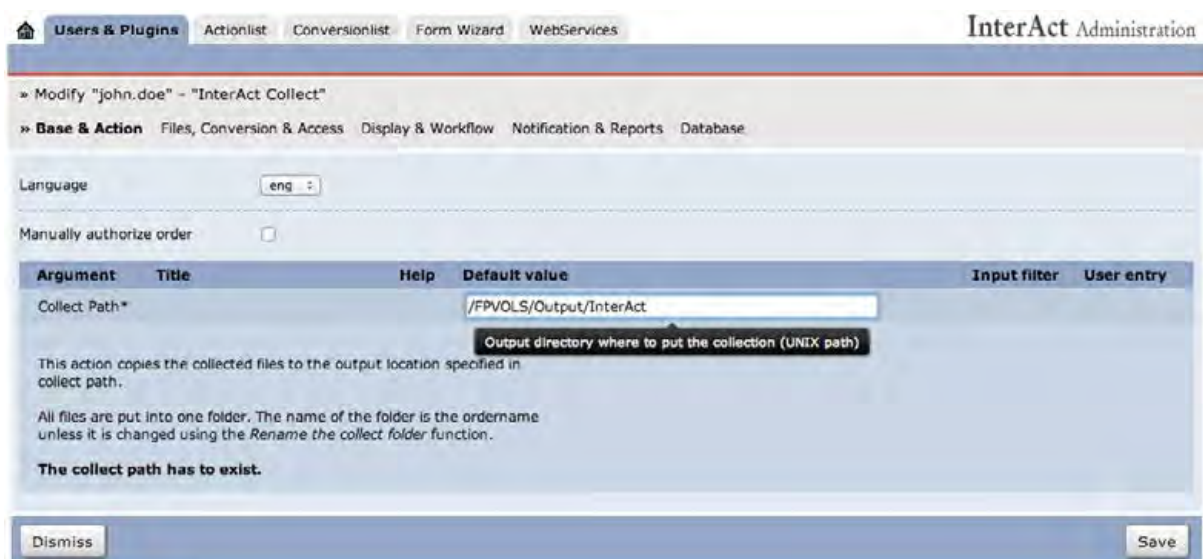
For the InterAct Custom Order, this tab is different from other plugins since it allows the admin to select a list of Actions (see Actionlists, 3.6) or a single Action to perform. When selecting a single Action, the page refreshes and the arguments for that action will be shown.

For more information about using the InterAct Custom Order plugin see 4.6.1.



The Base configuration tab on InterAct Custom Order, with select for action with actions and actionlists.

For other plugins that have a predefined action, the action will be loaded and its arguments show. No style select is available for a plugin with a predefined action.



The action section show the arguments of the action when using a plugin with a predefined action.

The table below describes the different configurations on the Base tab:

SETUP	DESCRIPTION
Style	Style to use for the plugin. This makes it possible to add custom styles. Only on InterAct Custom Order
Language	Language to use. The language corresponds to a language file. New languages can be added if needed by creating new folders in /usr/tracker/setup/language and adding files named as the files in the standard languages. It is recommended to copy an existing language folder and edit the existing files inside.

SETUP	DESCRIPTION
Manually authorize order	Check this if the order needs to be approved by an Administrator via the InterAct Jobadmin Plugin. When an order is placed, it will be held in a wait queue until it is approved. For more information about the InterAct Jobadmin plugin see 4.7. This setting may be affected by the use of file filters. See File filtering, section 6.5 for more information.
Action	Select a single action or an actionlist. See 3.5 and 3.6 for more information about the actions and lists. Only on InterAct Custom Order

4.1.2 Files, Conversion & Access

The “Files, Conversion & Access” tab contains setups to control loading the basket, filtering basket contents, conversion of assets and collection options.

The Files, Conversion & Access tab as shown when configuring the InterAct Custom Order plugin.

The table below describes the configuration options of the Files, Conversion & Access tab:

SETUP	DESCRIPTION
Include linked files	Check this to include files linked to assets in the basket. Files linked to the asset will be added to the basket automatically. This will work with files linked from a master InDesign file to images using the Xinet InDesign plug-in (or other filetypes supported by the Xinet linked files feature).
Read files recursively	When checked, any folders in the basket will be read recursively and all files inside are added separately. The folders themselves are ignored.
File filter	Select a file filter that will be applied to the basket BEFORE loading. The filter can be used to decide whether assets need to be approved or not or if they will even be a part of the InterAct basket. Decisions can be made based on different criteria like filepaths, file size, keyword values and so on. A certain file filter points to a file filter file saved in the system. Please see section 6.5 for more information.
Conversion	This setup can be used to assign ordering of converted files via lists of predefined conversion settings (Conversionlists, see 3.7) or Full conversion where the user can freely combine Format, Resolution, Color, etc.
Connect conversionlist to actionlist	This checkbox connects selection on actionlist with selection on conversionlist (1 to 1, 2 to 2, etc). Only the actionlist will be shown. Only on InterAct Custom Order
Order fpos	Allow user to order FPO's

SETUP	DESCRIPTION
Order high res	<p>Allow user to order High Res.</p> <p>Note: High res will be the default if no options are set.</p> <p>Note: When used with a conversion list, there will NOT be a high resolution option unless this option is set.</p>
Rename the collected files	<p>Each file in the order is collected to a collect folder before being handed over to an action. It is possible to rename files at this stage, using known information about the order (collected from form, date, database values, etc). The syntax for the rename is a string of components concatenated using the string '&', e.g.: segment1&segment2&segment3</p> <p>Each segment can be variable or static and follow the same rules as the building of paths and contents of reports and emails. Examples:</p> <p>date()&_&file.name - precede the original filename with the date file.vent.SKU - replace the name of the file with the value from the database field SKU (note that when using db fields, they also have to be collected, see 3.46) For more information about variables that can be used see 5.4</p>
Rename the folder enclosing collected files	<p>InterAct (in most cases) collect all files in an order into a collect folder. This folder is by default named: username + orderid. It is possible to change the name of the collect using similar techniques as the file rename above. The same type of variables are available for the order (see 5.4 for more details), but since the collect is a collection of several files, it is not possible to use any variable token that uses the "file." prefix since that will point to the current file. Examples:</p> <p>user.name&_&date() - add current date to the username divided by "_" order.COLLECTNAME - use the value of field COLLECTNAME from additional form (see 3.4.2)</p>
Supply extensions on collect	InterAct will add extensions to files that are without extension.

4.1.3 Display & Workflow

The Display & Workflow tab contains setups to modify the presentation of the plugin: Main Title, Additional form fields, etc. as well as change the Workflow.

The screenshot shows the 'InterAct Administration' interface. At the top, there are tabs: 'Users & Plugins', 'Actionlist', 'Conversionlist', 'Form Wizard', and 'WebServices'. The main heading is '» Modify "John.doe" - "InterAct Custom Order"'. Below this, there are sub-tabs: 'Base & Action', 'Files, Conversion & Access', '» Display & Workflow' (which is active), 'Notification & Reports', and 'Database'.

The 'Display & Workflow' tab contains several configuration fields:

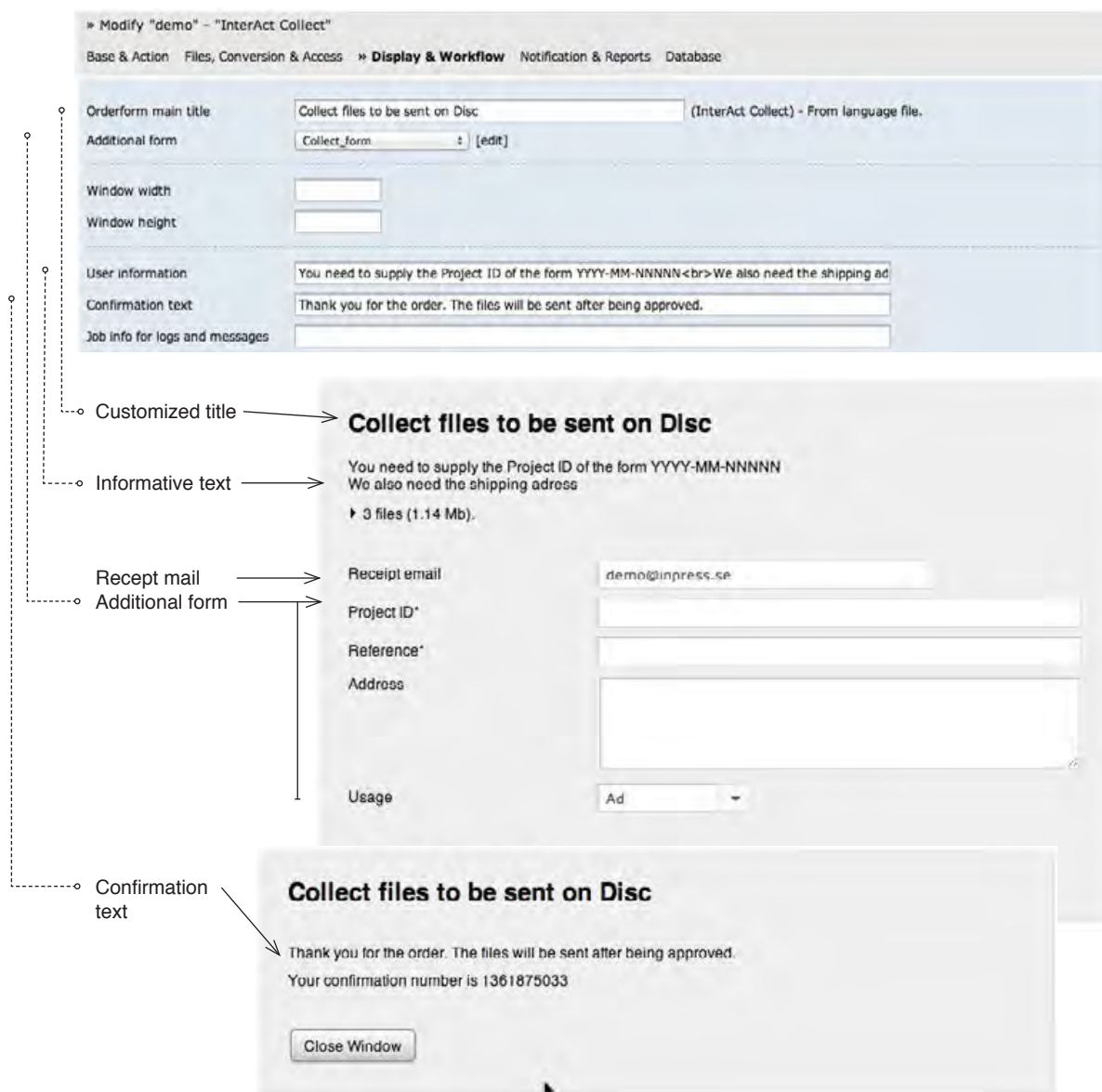
- Orderform main title:** A text input field with the value 'My own title'.
- Additional form:** A dropdown menu showing 'PO-Sample' with an '[edit]' link next to it.
- Window width:** An empty text input field.
- Window height:** An empty text input field.
- User information:** A text input field with the value 'Use this service to order images for external use.'
- Confirmation text:** An empty text input field.
- Job info for logs and messages:** An empty text input field.
- Options:** A section with four checkboxes:
 - ☐ Clear basket after submit
 - ☒ Close window after submit
 - ☐ Autosubmit order when opening plugin
 - ☒ Dont show file details in plugin window
- Custom variable:** An empty text input field.

At the bottom of the form, there are two buttons: 'Dismiss' on the left and 'Save' on the right.

The Display & Workflow tab as shown when configuring the InterAct Custom Order.

The table below describes the configuration options of the Display & Workflow tab:

SETUP	DESCRIPTION
Orderform main title	This text is displayed as the main title at the top of the Plugin form and, if InterAct opens in new window, as the Window title. It will also show as title in the basket of the current environment if using WebNative with the house_inpress style or InPressive styles or when using Portal together with the InPress Portal Integration Kit (IPIK).
Additional form	The basic form entry for the selected action can be expanded with additional form fields. This can be done either by building a form using the Form Wizard (see 3.8.1) or by adding a custom form (see 3.8.5) The purpose of an additional form is to supply extra fields that can be collected as part of the orderprocess.
Window width	Width of InterAct window if opened in separate window (depends on environment)
Window height	Height of InterAct window if opened in separate window (depends on environment)
User information	Text that is shown in the order interface in main order form. The text is written above the main form elements and can be used to provide user with extra instructions or information.
Confirmation text	Text that is shown in the interface when an order has been placed.
Job info for logs and messages	Job info is used to customize the message about the jobs that appear in the jobadmin list and can also be included in notifications. Every action has a default jobinfo setup. Custom jobinfo is created by concatenating strings using the data available to notifications and reports, similar to renaming the collect folder (See 3.4.1). Example (assuming Action is sendbyftp): Sending ftp to &order.FTPHOST& and emailnote to &order.EMAIL Will translate to something equivalent to: Sending ftp to ftp://ftp.hobbiton.me and emailnote to frodo@baggins.me
Clear basket after submit	Current basket is cleared after order has been placed.
Close window after submit	InterAct window is auto-closed after order has been placed.
Autosubmit order when opening plugin	Order is autosubmitted when opened. All order arguments need to be set to valid values.
Dont show file details in the plugin window	Most plugins will show a file detail browser that can be unfolded at the top of the plugin window. This browser is on by default. Check here to hide the section.
Custom variables	Ability to pass a custom variable into the plugin window's style. Used mainly in custom styles and workflows.



Display options that affect different aspects of InterAct form: title, information text, additional form and confirmation text.



Turning on and off the filedetails

4.1.4 Notification & Reports

The Notification & Reports tab contains setups for formatting and sending email notifications, writing receipts into the collect folder and writing reports.

The screenshot shows the 'InterAct Administration' interface. At the top, there are tabs: 'Users & Plugins', 'Actionlist', 'Conversionlist', 'Form Wizard', and 'WebServices'. The 'Notification & Reports' tab is selected. Below the tabs, there is a breadcrumb trail: '» Modify "John.doe" - "InterAct Custom Order"'. The main content area is divided into sections: 'Base & Action', 'Files, Conversion & Access', 'Display & Workflow', '» Notification & Reports', and 'Database'. The 'Notification & Reports' section contains the following fields and options:

- Administrator mail:** A text input field containing 'info@inpress.se'. Below it are two checkboxes: 'Notify on Order' and 'Notify when run'.
- Receipt mail:** A text input field containing 'Use user email'. Below it are two checkboxes: 'Make receipt mail dynamic' and 'Receipt on Order'.
- Notification templates:** A dropdown menu.
- Reply-to mail:** A text input field containing 'info@inpress.se'.
- Receipt template:** A dropdown menu.
- Receipt filename:** A text input field.
- Report template:** A dropdown menu.
- Report output path:** A text input field.

At the bottom of the form, there are two buttons: 'Dismiss' and 'Save'.

The Notification & Reports tab as shown when configuring the InterAct Custom Order.

The table below describes the configuration options of the Notification & Reports tab:

SETUP	DESCRIPTION
Administrator mail	<p>Email address of administrator that should get a notification. Multiple email addresses can be used by comma-separating.</p> <p>The email can be hardcoded, retrieved from the database (field on asset), read from WebNative account or posted via the form.</p> <p>db(dbfieldname,defaultaddress) - <i>dbfieldname</i> is the fieldname in the venture database and <i>defaultaddress</i> is the default (optional) to be used if there is no data in the field. Example: db(asset_librarian,admin@inpress.se)</p> <p>Note that when using database defined admin mail, the order can be split into multiple orders if there are different admin mails on different assets.</p> <p>uploademail - will use the email address set as "upload email" in WebNative</p> <p>order.FIELDNAME - read email from a field passed in via a form wizard form</p> <p>Admin mail can also be submitted as an additional field named: ADMMAIL</p>
Notify on order	Send notification when order is placed
Notify when run	Send notification when order is run
Receipt mail	<p>Email address to user that should get a receipt. Multiple email addresses can be used by comma-separating.</p> <p>The email can be hardcoded, retrieved from the InAlias database (email used for registration), read from WebNative account or posted via the form.</p> <p>Use the Tool palette to the right to set the value to use a predefined value:</p> <p>User email = email saved in WebNative Venture</p> <p>Inalias email = email used when registering using inalias (see www.inpress.se for more info about InAlias)</p> <p>Upload email = uploademail saved in WebNative</p> <p>Username = treat user account name as an email address</p> <p>order.FIELDNAME - read email from a field passed in via a form wizard form</p> <p>user.name - will insert the user account name as email address. Can be combined with '&' and 'user.group' and static texts. Examples: user.name&@inpress.se or user.name&@user.group</p>

SETUP	DESCRIPTION
Make receipt mail dynamic	InterAct will display an input field for collecting the receipt mail dynamically when this option is checked. This option is the same as making an RCPMAIL entry via an extra orderform.
Receipt on order	Send notification when order is placed
Notification template	Layout of emails that are being sent. The default email is an html formatted email and text email is shipped as an alternative. Custom email templates can be added and selected. See 5.2 for more info.
Reply-to address	Reply-to address to be used for notifications. The base config Mailsender setup is used if left empty. Use the Tool palette to the right to set the value to use a predefined value: Admin email = email used for Administrator email Receipt email = email used for Receipt email
Receipt template	Template to be used to format a receipt written to the collect folder. Select the template to use for this user/group. Custom receipt templates can be added and selected. For more information on the structure of a template, see 5.6
Receipt filename	The name of the receipt to go into the collect folder. Note that the receipt is always written into the collect folder and cannot be a path
Report template	Template to be used to format a report written to a configurable path. Select the template to use for this user/group. Custom report templates can be added and selected. For more information on the structure of a template, see 5.6
Report output path	The output path where to write the report. The path is the full path to the reportfile itself, example “/myRAID/reports/InterAct/userA.txt”. The path can also be dynamic and contain a number of tokens or functions concatenated by the “&” character, example: “/myRAID/reports/InterAct/&user.group/&user.name/&date()&.xml” will translate to something like: “/myRAID/reports/InterAct/hobbits/frodo/2011-11-01.xml”. Most tokens that are available for reports and notifications (see 5.4) and can be used in the path but since an order may include multiple files, the file related tokens (like file.name) are of no real use in this case.

4.1.5 Database

The Database tab contains setups for retrieving data from WebNative Venture as well as updating keywords on assets processed by the plugin.

The screenshot shows the 'InterAct Administration' interface. The top navigation bar includes 'Users & Plugins', 'Actionlist', 'Conversionlist', 'Form Wizard', and 'WebServices'. The main content area is titled '» Modify "john.doe" - "InterAct Custom Order"'. Below this, there are tabs for 'Base & Action', 'Files, Conversion & Access', 'Display & Workflow', 'Notification & Reports', and '» Database'. The 'Database' tab is active, showing configuration options for retrieving and exporting data. The options include: 'Retrieve database fields' (with a text input field), 'Write export file' (with a dropdown menu set to 'No Export'), 'Export file template' (with a text input field), 'Set database fields on original files' (with a text input field containing 'ordered= + ; orderdate=date()'), and 'Set database fields on collected files' (with a text input field). At the bottom, there are 'Dismiss' and 'Save' buttons.

The Conversions tab as shown when configuring the InterAct Custom Order.

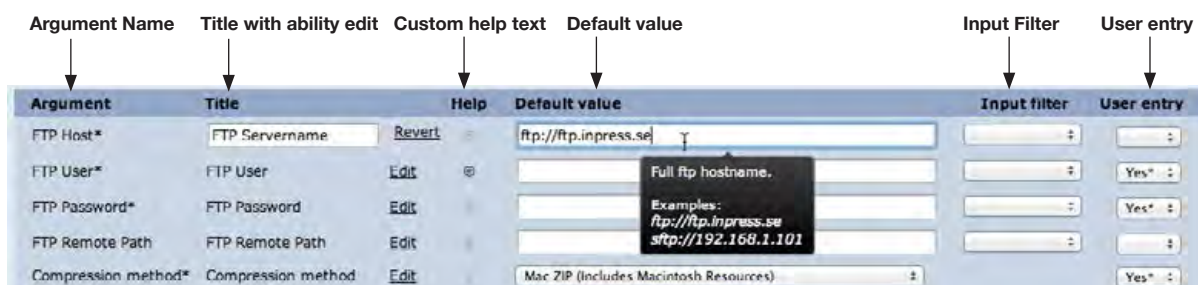
The table below describes the configuration options of the Database tab

SETUP	DESCRIPTION
Retrieve database fields	<p>Type in the name(s) for database fields to be retrieved from Venture when order is executed. For multiple datafields, use comma separation: Field1,Field2,Field3.</p> <p>Values can be included in notifications and reports, as well as being written as an export to the collected folder and delivered by some actions.</p> <p>Specifying userperms will cause InterAct to use the userperm setting to decide what fields to read.</p>
Retrieve database fields for plugin	If checkbox is set, the keyword contents of the above keywords will be made available in the interface to be used in custom styles.
Write export file	<p>Write export file for retrieved database fields into collected folder. Actions that deliver the entire folder will include the export. The plugin "Sendmailcomment" will attach the report.</p> <p>Export can be one per asset or a compound file for all assets</p>
Export file template	<p>Select template to be used for the export file.</p> <p>Note that the same templates are used for database exports and InterAct reports (see notification). See 5.6 for more information.</p> <p>Default export file format is tab delimited.</p>
Set database fields on original files	<p>Text that is shown in the order interface in main order form.</p> <p>The text is written above the main form elements and can be used to provide user with extra instructions or information.</p>
Set Venture fields on job files	<p>It is possible to set datafields in Venture associated with the original asset. Multiple fields can be set separated by comma: Field1=value,Field2=value,Field3=value.</p> <p>The values can be names of variables, strings, numbers or tokens from the dataset available to notifications and reports (see 5.4).</p> <p>It is also possible to appoint values using other operators than "=", for example "=+".</p>
Field=VALUE	Sets the Field to VALUE. Example: "Orderdate=date()". The date function inserts the current date.
Field=+	Increments the field by 1. The field can be an integer or string. Example: "Usage=+".
Field=-	Decrements the field by 1.
Field=+VALUE	Increments the field by VALUE. Example: "Total_Sales=+order.Quantity".
Field=-VALUE	Decrements the field by VALUE. Example: "Stock=-order.Quantity".
Field=!VALUE	Sets to VALUE only if no the database field is empty. Example: "First_Orderer=!user.name"
Field=>VALUE	<p>Inserts string VALUE before any existing value and reapplies the string to the field. Example: "Last_orderdates=>date()&,".</p> <p>A string like "2009-10-25,2009-09-15,2009-06-12" will be maintained, with new additions at the START of the string.</p>
Field=<VALUE	<p>Inserts string VALUE after any existing value and reapplies string to the field. Example: "LastOrderPOs=<order.PO&".</p> <p>A string like "123456 456789 789123" will be maintained, with new additions at the END of the string.</p>
Field=[VALUE	<p>Adds string VALUE to Field. Each VALUE will only be added once. Example: "Orderers=[user.name".</p> <p>Using three times with usernames "adam", "bill" and "ceasar" will result in the string "adam bill ceasar" being stored in Field.</p>
Field={VALUE	<p>Adds string VALUE to Field. Each VALUE will only be added once. If a value is added more than one time, a counter will be created and updated for each occurrence. Example: "Orderers={user.name".</p> <p>Using six times with usernames "adam", "bill", "adam", "caesar", "adam" and "ceasar" will result in the string "adam(3) bill ceasar(2)" being stored in Field.</p>

SETUP	DESCRIPTION
Set database fields on collected files	It is possible to set datafields in Venture associated with the collected asset if collection is made to Venture enabled area. Same rules apply to write to collected file as to original file.

4.2 Common Action arguments

The action setup on the plugins are similar on all plugins and some specific instructions can be used in many different places. The configuration is divided into arguments that each has a name, custom title, helptext, default value, input filter and user entry setting. Tooltips giving information regarding the argument can be viewed when the default value is edited or by hovering over the name of the argument.



Arguments for Action



Tooltip information about argument



Editing help text for argument



SETUP	DESCRIPTION
Argument name	The name of the argument from the action. An asterisk after the name indicates that the argument is a required argument.
Title	The title shown in the list is the corresponding title from the selected language. Use the Edit link to open the edit box to insert a custom title. Revert to go back.
Custom help text	Click the icon to open an edit dialogue where to insert a help text that will be shown as a tooltip in the user interface. A grey icon means there is currently no text saved with the argument. Hovering over a black icon will show the current text.
Default value	Default value of or specific instruction to InterAct on how to display the argument when passed to the user. Value to be used for the argument when NOT passed to the user
Input filter	Filter to apply to the input. See 6.3 for more information on input filters

SETUP	DESCRIPTION
User Entry	Select whether to show this argument to the user or hide it. Depending on the argument type, this setting may or may not be available and the options may include both required and not required settings.

4.2.1 Specific argument instructions

Some arguments above allow certain specific instructions on how to be displayed to the user. For example, when using the Sharebasket plugin it makes sense to let the user decide what user to share the basket with. So, for that plugin, the User entry select will most likely be set to Yes:



Resulting in an input form looking like:

Since it may be a bit hard to know all the usernames, it is possible to have InterAct automatically create a selection of the users instead. By using an argument instruction, it is easy to have InterAct create a selection instead:



Resulting in a select built up from the user accounts in the group that the user has selected as its primary group.

A number of different instructions like the one described above can be used to automatically pull in information.

INSTRUCTION	DESCRIPTION
[user]	Insert the current user's username
[useremail]	Insert the current user's email address as defined in WebNative
[uploademail]	Insert the current user's upload email address as defined in WebNative
[autoemail]	Insert the current user's email address as defined in WebNative. If email address is not defined, the username will be inspected. If it contains a @ character it will be used instead.
[user.ATTRIBUTE]	Several attributes of a user and user setup can be autoloaded into the form using the form [user.ATTRIBUTE] where ATTRIBUTE can be name , group , address , admmail , rcpmail , xin_email or xin_uplemail . If the user has been added to Xinet through InAlias the info from the InAlias database can be called upon using the form [user.ina_ATTRIBUTE] where ATTRIBUTE is a data field collected via InAlias. As an example, to get the sitename you would use: [user.ina_sitename].
Value1 Value2 Value3	Build select from values separated by The values will be used both as title and values on the options Example: Selecting from usernames adam bob cecil david

INSTRUCTION	DESCRIPTION
Title1;Value1 Title2;Value2...	Build select from values separated by ; and The Titles are shown on the options and the values are passed Example for setting expiration on baskets in the share basket plugin: None; 1 day;24 2 days;48 1 week;168
/Popupfile	Build select defined in a flat file. The file needs to reside in /usr/tracker/setup/popups. It needs to be an isolatin file with unix linebreaks and each line will be interpreted as an option in the select. If the line has two values separated by a tab, the first will be used as title and the second as value.
[date] [date:format]	Create a datepicker input. The datepicker will insert a date using format . If there is no format specified it will use isodate as default (YYYY-MM-DD). See the input filter section for more info on datepicker formats.
[groupmembers]	Read all the usernames from the current user's primary WebNative group and build a select
[groupmembers:+username,-username]	Read all the usernames from the current user's primary WebNative group and build a select. Add and subtract additional users to the list. -user will remove the current user, ie [groupmembers:-user] will show all users of the current primary WebNative group except the current user
[group:GROUP1,GROUP2]	Read all the usernames from the named WebNative groups GROUP1 and GROUP2 and build a select. List several groups separated by comma.
[groupemails:GROUP1,GROUP2]	Read all the emails of the users from the named WebNative groups GROUP1 and GROUP2 and build a select. If there is no email address present on the user, the username will be checked. If it has a @ character in the name, it will be treated as an email. List several groups separated by comma.
[emailanduser] [userandemail]	Variants of the above in which the title show the email and the value is username (emailanduser) and vice versa (userandemail)
[keywordpop:keywordname]	Build a select from popup options defined for a keyword.
[keywordcurrent:keywordname]	Build a select from all the current values in a keyword.
[inaliasusers:SITE1,SITE2]	Read all the user names from the named InAlias sites and build a select. List several sites separated by comma.
[inaliasemails:SITE1,SITE2]	Read all the email addresses from the named InAlias sites and build a select. List several sites separated by comma.
[dbuserperm]	Show a list of all keywords available to the user
[struct:PATH:OPTS]	Read all files/directories within a certain path and present as options. OPTIONS is optional and can either be the word files or dirs to restrict to only show files or dirs. Only first level of folder is shown. Example: [struct:FPVOLS/Clients:dirs] would present a popup consisting of all folders within the directory /FPVOLS/Clients.

4.2.2 Argument palettes

Some arguments display an icon to the right hand of the default value field. The icon, a gear, will open a small palette when clicked. The palette will help insert argument instructions (as per above) or other specific instructions or samples thereof, that can be used for the argument.

A palette can also be shown on some of the other tabs as well.

For example, the Asset Link plugin needs an expiry setting. It is possible to insert a hardcoded value, have an input for the user, build a select for the user or display a datepicker where a user can select the date from a calender-type interface.

The datepicker is triggered as per the argument instructions in the previous section and a select can be made using pipe separation. The palette makes it easier to trigger the datepicker and can also provide a sample setup for building the select:

Selecting “use datepicker” will insert the Use datepicker setting

Selecting “manual select sample” will insert the sample

Note that some of the palette selections will insert a full command like “use datepicker” which in reality is saved as “[date]” but displayed as the text “Use datepicker“. On the other hand, the “Manual select sample” will insert the sample select which show up like it is inserted and may be edited to suit the particular needs.

If the administrator happen to know that “[date]” will be used to display the datepicker, he can type in that particular instruction in the field and save. When the page is reloaded, since there is a palette on the field, the instruction will be recognized and the corresponding text shown as if the original input was made by using the palette.

Typing in “[date]” and then save ...

... displays “Use datepicker” when reloading

4.3 Collaboration plugins

The collaboration plugins are intended for collaboration between users of WebNative and in a couple of cases, for persons that have no account in WebNative.

The plugins can be used to share baskets, send information create temporary accounts for gathering feedback and so on.

4.3.1 InterAct Asset Review

The Asset Review plugin creates a view of the items in the basket that can be used for a certain time before expiring. The view is accessed via a link sent in an E-mail. The person accessing the link does not need to provide user credentials.

The view is either created using a shared WebNative account, *shared user mode*, or by dynamically creating temporary accounts using a template account, *temporary user mode*. The link is set to expire after a certain period of time. If using a temporary account, that account is automatically removed when the link expires.

The view inherits the configurations (plugins, database keyword setups, etc) from the shared/ template account. The look and feel is decided by InterAct but can be styled using custom css styles.

When inside the Asset Reviewer, the assets and asset info can be viewed. WebNative Plugins and Database keywords can be accessed allowing interaction via InterAct plugins or Xinet Triggers and actions. What functions that are available depend on the user template account. A minimal setup will be applied (using the InterAct mailcomment plugin) when using temporary user mode without a template account.

It is not possible to use the temporary user mode on systems bound to Active/Open directory, since the Asset Review plugin needs to create actual local accounts in the backend.

This plugin replaces the version 4 lightbox plugin.



In shared mode access is done using a shared account

In temporary mode access is made using a temporary account



Temporary user mode can NOT be used on systems that are bound to Active or Open directory

SETUP	NOTES	DESCRIPTION
Access code	Can be passed to user	Optional password used when accessing the Asset review. If password is left empty, the link will open the Asset review directly.
User method	Required Can be passed to user	Select whether to use the User template account to create a temporary account (temporary user mode) or to actually use the User template account to access the service (shared user mode). Temporary accounts can also be created based of the email address where the request was sent to. If using this mode with multiple email addresses, there will be one temp account per email address. If using a shared account, the user template below needs to be specified using USERNAME:PASSWORD. Temporary accounts cannot be used in environments using Active/Open Directory connectivity
User template	Required Can be passed to user	WebNative username of the template user account or WebNative username:password for a shared user account. The template/shared user must exist as a user account in WebNative. The user account created by the Asset Review in the temporary user mode is a clone of this existing user. To have the ability to choose between several template/shared users, create a pulldown menu by separating several usernames with pipes: Example: usernameA usernameB usernameC.. The [group:GROUPNAME] instruction can also be used to create a select of all users in the group GROUPNAME
Expiry time	Required Can be passed to user	How long the link will be active (in hours) or the date (YYYY-MM-DD) of expiry. Use the palette icon to select entry options or.. To have the ability to choose between several expiry times, create a pulldown menu by separating the options using pipe: Example: 1 day;24 2 days;48 1 week;168 or 24 48 96 ... To create a datepicker enter [date]
WebNative Server URL	Required	The URL to the WebNative server, example: http://webnative.somewhere.com. When the user will be accessing the system via Portal, this should be the URL used from the Portal server to access the backend WebNative server. If the user will be accessing the WebNative server directly, this should be the URL used to access the server from the outside.
Portal URL		The URL to the Portal server, example: http://portal.somewhere.com This entry should be left empty when the user will be accessing the WebNative server directly NOTE: The InPress Portal kit (version 5 or higher) needs to be installed on the Portal server when accessing Asset Review via Portal. See IPIK notes in section 7
Email	Required Can be passed to user	Email address where to send the Email message that includes the access link.

SETUP	NOTES	DESCRIPTION
Email subject	Can be passed to user	Subject in email. Will default to language strings
Email message	Can be passed to user	Message in email
Notify admin	Can be passed to user	Decide whether to notify admin when Asset Review is accessed. Notification will be sent to the admin email address specified on the Notification & reports tab. No - no email sent First access - an email sent the first time the Asset Review is accessed Every access - an email sent every time the Asset Review is accessed When sending link .. - will also notify when the link is sent. Can be combined with access notifications.
IAMESSAGE	Set via Form Wizard form	The message in the landing page accessed by the link in the email. Defaults to the Email Message
LBLOGO	Set via Form Wizard form	Change logo in the Asset review site/style. Need to be a full image URL.
LBTITLE	Set via Form Wizard form	Change the title in the upper left corner in the Asset review site/style. Will default to language string.
LBHIDEPLUGS	Set via Form Wizard form	List plugin/functions to hide in the Asset review Portal interface. List the functions as a commaseparated list: function1,function2,.. Currently ONLY annotate is supported
IAPWMAIL	Set via Form Wizard form	Change behaviour of Email notification when using an Access Code. By default, the access code is sent in a separate Email if used. Set to 0 to not send Set to 1 to send in separate Email (default behaviour) Set to 2 to include in same Email
IAREMINDER	Set via Form Wizard form	A number of hours. A reminder will be sent if the link has not been used before these number of hours.

» Modify "John.doe" - "InterAct Asset Review"

» **Base Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language eng

Argument	Title	Help	Default value	Input filter	User entry
Access code	Access code	Edit	<input type="text"/>	<input type="text"/>	Yes <input type="text"/>
User method*	User method	Edit	Create temporary user account <input type="text"/>	<input type="text"/>	<input type="text"/>
User template*	User template	Edit	AR_template_temp <input type="text"/>	<input type="text"/>	<input type="text"/>
Expiry time*	Expiry time	Edit	Use datepicker <input type="text"/>	<input type="text"/>	Yes* <input type="text"/>
Webnative server URL			http://192.168.99.90 <input type="text"/>		
Portal URL			http://81.200.175.10 <input type="text"/>		
E-mail*	E-mail	Edit	<input type="text"/>	<input type="text"/>	Yes* <input type="text"/>
E-mail subject	E-mail subject	Edit	Your Access to Assets <input type="text"/>	<input type="text"/>	<input type="text"/>
E-mail message	E-mail message	Edit	<input type="text"/>	<input type="text"/>	Yes <input type="text"/>
Notify admin	Notify admin	Edit	Yes, first access <input type="text"/>		<input type="text"/>

This action creates a temporary access to use to review assets

Typical setup for Asset Review using the temporary user mode and accessing via a Portal server

4.3.1.1 Setup considerations

When using the Asset Review plugin, there are three roles to consider:

Admin is the person logged in as nativeadmin, enabling and configuring the plugin for the User

User is the person logged into WebNative with a user account, and is using the Asset Review plugin to send a viewer to the Reviewer

Reviewer is the person receiving an email with a link, using that link to get access to the Assets via the Asset Review

Email notifications will be sent in different stages of the use of the plugin. The following email setups will be used for the different roles:

Admin Email : Notification & Reports > Administrator mail

User email : Notification & Reports > Receipt mail

Reviewer email : Base & Action > Email address (required)

The plugin will send messages in the following stages:

1. The Asset review is created

Reviewer will get email with link (1 or 2 emails depending on use of password)

Admin will get a copy if there is an Administrator mail set

User will get a copy if there is a Receipt mail set

2. The Asset review is opened

Admin will be notified if “Notify when used” is set to “yes” and if there is an Administrator mail set

User will be notified if “Notify when used” is set to “yes” and if there is a Receipt mail set

4.3.1.2 Configuration steps

Configuration of the Asset Review plugin can be divided into several steps:

Step 1: Decide whether to work in **Temporary user mode** or **Shared user mode**. In environments where WebNative is bound to Active/Open directory, the only option is a Shared User.

A Temporary user account setup will create a temporary account (named ~lb.NNNNNN) by copying the template account and then applying some additional configuration on that account automatically. No volumes should be applied to the Template account in this mode.

A Shared user setup use the chosen Template account as the account to access when the reviewer is opened. The account itself is not changed by the plugin. Volumes have to be set to allow access to all the items that may go into the basket.

Step 2: Setup the template account.

When in **Temporary user mode** the template account will be copied and then automatically updated to work with the Asset Reviewer. The template account needs to have all the Plugins and Keyword settings required. Volumes and styles are added to the temporary account automatically.

If the template account has any InterAct plugins enabled and configured, those configurations may be updated dynamically when the temporary account is created. To enable dynamic update of a certain setting, define the value as `refplug.SETTING` where SETTING is a name referenc-

ing the value to use for the update. For example, to use the receipt email from the setup where the temporary account is create in a field in the temporary account, use “refplug.notif.receipt”.

“SETTING” can be any value from the array of data available to notifications and reports. Some typical values to use are:

refplug.notif.admin	Admin email setup on the plugin creating the Asset review
refplug.notif.receipt	Receipt email setup on the plugin creating the Asset review
refplug.user.name	Username of user creating the Asset review
refplug.user.group	Primary WebNative group of user creating the Asset review
refplug.order.EMAIL	Email address where Asset review is being sent to

A standard setup using the InterAct mailonly plugin as the only added configuration is made automatically for Temporary users when a template account cannot be found.

When working in **shared user mode**, the template account is used as it is, and all setups are maintained. That means that the admin needs to *add volumes to have access to the assets* that are shared. All plugins and database settings need to be assigned as well.

If the Reviewer will be accessing the server directly (without Portal) it is also important to assign the right styles to the template account. All styles should be set to the “inpress_assetreview” style.

Step 3: Setup the rest of the Asset Review configuration.

Decide whether to use a password. Enter a hardcoded value or pass the decision to the User that will create and send the access to the Asset Review.

Select the mode and add a template account. In the case where the user should be able to choose from different types of template accounts when creating the Asset Review, it is possible to make a select by separating several choices using “|” (pipe).

In the shared user mode, the template account also needs to supply the password to use:
template_account:password

The expiry time can be hardcoded by the Admin or left to the User to decide on by type-in, select or datepicker. If no expiry time is given, it will default to 24 hours. When using dates, the expiry will be at the end of the day of that date.

Server URL setups decide if the setup is a Portal setup or WebNative only setup. When giving only the WebNative server URL, it is assumed that the Reviewer will access the WebNative server directly and the address needs to be the “outside” address of the server. When giving both a WebNative and a Portal server address it is assumed that the Reviewer is accessing via Portal and the WebNative address should in this case be the Address used by Portal to access WebNative.

Email setup is similar to most InterAct setups. The Email address is the address to the Reviewer.

Some specific setups need to be added via a Form Wizard form. See the list above and read more about form wizard in section 3.8.

4.3.1.3 Example - Temporary user mode, Portal server access

Below follows a full example, configuring a workflow using the Asset Review plugin with temporary user mode, and accessing the Review from a Portal server. InterAct Mailcomment or WebNative keywords are used to send back information when inside the Reviewer.

The admin has the email address demoadmin@inpress.se. The user is logged into the server as the user john.doe which has a WebNative email setting of john.doe@inpress.se. The Review email is sent to a person with the email account demo@inpress.se.

1. Creating the Template user account and configuring InterAct Mailcomment plugin.

The template user has no volumes and the styles are set to default. Only the Mail comment plugin is enabled as a plugin. A database keyword setup is made on the template user.

The screenshot shows the 'Users' management interface. The 'Users' tab is selected, and the 'AR_template_temp' user is chosen. The 'Settings' section is expanded, showing various user configuration options.

Setting	Value	Action
User Type	Local Apache	
Primary Group	-None-	
Template	interact_approval	
Permission Set	Edit	
Upload email address		
User can change password	default (False)	
Access Control	default (Everyone)	
Default download format	default (Mac: ZIP (includes Macintosh Resources))	

Basic setup on template user for Temporary user mode

The screenshot shows the 'User Volumes' management interface. The 'User Volumes' tab is selected, and the 'AR_template_temp' user is chosen. The 'Volumes for:' dropdown shows 'AR_template_temp'. Below the dropdown, a message states: 'User or Group AR_template_temp has no volumes configured'.

No volumes assigned to template user

The screenshot shows the 'Styles' management interface. The 'Styles' tab is selected, and the 'AR_template_temp' user is chosen. The 'Action' and 'Styles' columns are visible, showing default settings for various actions.

Action	Styles
basket	default (house)
browse	default (house)
css	default (house)
icons	default (house)
imageinfo	default (house)
language	default (classic)
order	default (house)
quarkview (mview)	default (house)
search	default (house)
toplevel	default (house)
upload	default (house)

Default style setup

[Volumes/Users](#) | [Database](#) | [Print/Hot Folder](#) | [AFP/Access](#) | [License](#) | [Logging](#) | [Portal](#)
[System Volumes](#) | [Users](#) | [User Volumes](#) | [Groups](#) | [Styles](#) | **Plugins** | [Permissions](#)

Plugins [Accelerator](#) | [InterAct](#) | [InAlias](#) | [EnRoute](#)

Username:

Plugins	Setting
Administer Baskets	<input type="radio"/> default (on) <input type="radio"/> on <input checked="" type="radio"/> off
Download Archive of Files	<input type="radio"/> default (on) <input type="radio"/> on <input checked="" type="radio"/> off
Download Archive of FPOs	<input type="radio"/> default (on) <input type="radio"/> on <input checked="" type="radio"/> off
Request Shipment	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Custom Order	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Collect	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Share Basket	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Send Maillink	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Send FTP	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Move Files	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Broadcaster	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Lightbox	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Client Creator	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Project Creator	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InCharge Job Deliver	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off
InterAct Mail Comment	<input type="radio"/> default (off) <input checked="" type="radio"/> on <input type="radio"/> off
InterAct Delete Files	<input checked="" type="radio"/> default (off) <input type="radio"/> on <input type="radio"/> off

Only InterAct mail comment is enabled

[Volumes/Users](#) | [Database](#) | [Print/Hot Folder](#) | [AFP/Access](#) | [License](#) | [Logging](#) | [Portal](#)
[System Volumes](#) | [Users](#) | [User Volumes](#) | [Groups](#) | [Styles](#) | [Plugins](#) | **Permissions**

User Permissions [Edit User Permissions](#)

Username:

Template	Permission Set	Source
interact_approval	Edit	user

A keyword permissions setup is assigned to the template user

» Modify "AR_template_temp" - "InterAct Mail Comment"

» **Base & Action** | [Files, Conversion & Access](#) | [Display & Workflow](#) | [Notification & Reports](#) | [Database](#)

Language:

Argument	Title	Help	Default value	Input filter	User entry
E-mail*	E-mail	Edit	#refplug.notif.receipt#	<input type="text"/>	<input type="text"/>
E-mail subject	E-mail subject	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
E-mail message	E-mail message	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
Comment per file			<input type="text" value="Yes"/>		
Include thumbnails	Include thumbnails	Edit	<input type="text" value="Yes"/>		<input type="text" value="Yes"/>
Include keywords	Include keywords	Edit	All user keywords	<input type="text"/>	<input type="text"/>
Apply comment to keyword			<input type="text"/>		

This action sends an email including information passed by the user in the form as well as the possibility to retrieve and include keyword data as well as a thumbnail. The thumbnail will be inserted into email if it is from an image or eps/pdf and requires no access to the site.

The mail comment plugin will send to the receipt email of the user that creates the Asset review plugin

» Modify "AR_template_temp" - "InterAct Mail Comment"

Base & Action Files, Conversion & Access » **Display & Workflow** Notification & Reports Database

Orderform main title: (InterAct Send Mail Comment) - From language file.

Additional form: [edit]

Window width:

Window height:

User information:

Confirmation text:

☐ Clear basket after submit
☐ Close window after submit
☐ Autosubmit order when opening plugin
☐ Dont show file details in plugin window

A custom title is set on the plugin

2. Configuring the Asset review plugin on the User account (john.doe)

The plugin's user method is set to "Create temporary user account" and to use the user template AR_template_temp. The user will not be able to change these settings when creating the Asset Review (no user entry). A date picker will be used to set the Expiry of the Asset Reviewer.

A portal server is accessed from the Reviewer and a setting is provided for the Portal server to Access the correct backend server.

» Modify "john.doe" - "InterAct Asset Review"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language:

Argument	Title	Help	Default value	Input filter	User entry
Access code	Access code	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
User method*	User method	Edit	<input type="text" value="Create temporary user account"/>		<input type="text"/>
User template*	User template	Edit	<input type="text" value="AR_template_temp"/>	<input type="text"/>	<input type="text"/>
Expiry time*	Expiry time	Edit	<input type="text" value="Use datepicker"/>	<input type="text"/>	<input type="text" value="Yes*"/>
Webnative server URL			<input type="text" value="http://192.168.99.90"/>		
Portal URL			<input type="text" value="http://81.200.175.10"/>		
E-mail*	E-mail	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes*"/>
E-mail subject	E-mail subject	Edit	<input type="text" value="Your Access to Assets"/>	<input type="text"/>	<input type="text"/>
E-mail message	E-mail message	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
Notify admin	Notify admin	Edit	<input type="text" value="Yes, first access"/>		<input type="text"/>

This action creates a temporary access to use to review assets

Base and Action setup for Asset Review in temporary user mode

» Modify "john.doe" - "InterAct Asset Review"

Base & Action Files, Conversion & Access » **Display & Workflow** Notification & Reports Database

Orderform main title: (InterAct Asset Review) - From language file.

Additional form: [edit]

Window width:

Window height:

User information:

Confirmation text:

☐ Clear basket after submit
☐ Close window after submit
☐ Dont show file details in plugin window

A custom title on the plugin that will show up in the User's environment

» Modify "john.doe" - "InterAct Asset Review"

Base & Action Files, Conversion & Access Display & Workflow » **Notification & Reports** Database

Administrator mail:

Receipt mail:

☐ Make receipt mail dynamic

Notification templates:

Reply-to mail:

Report template:

Report output path:

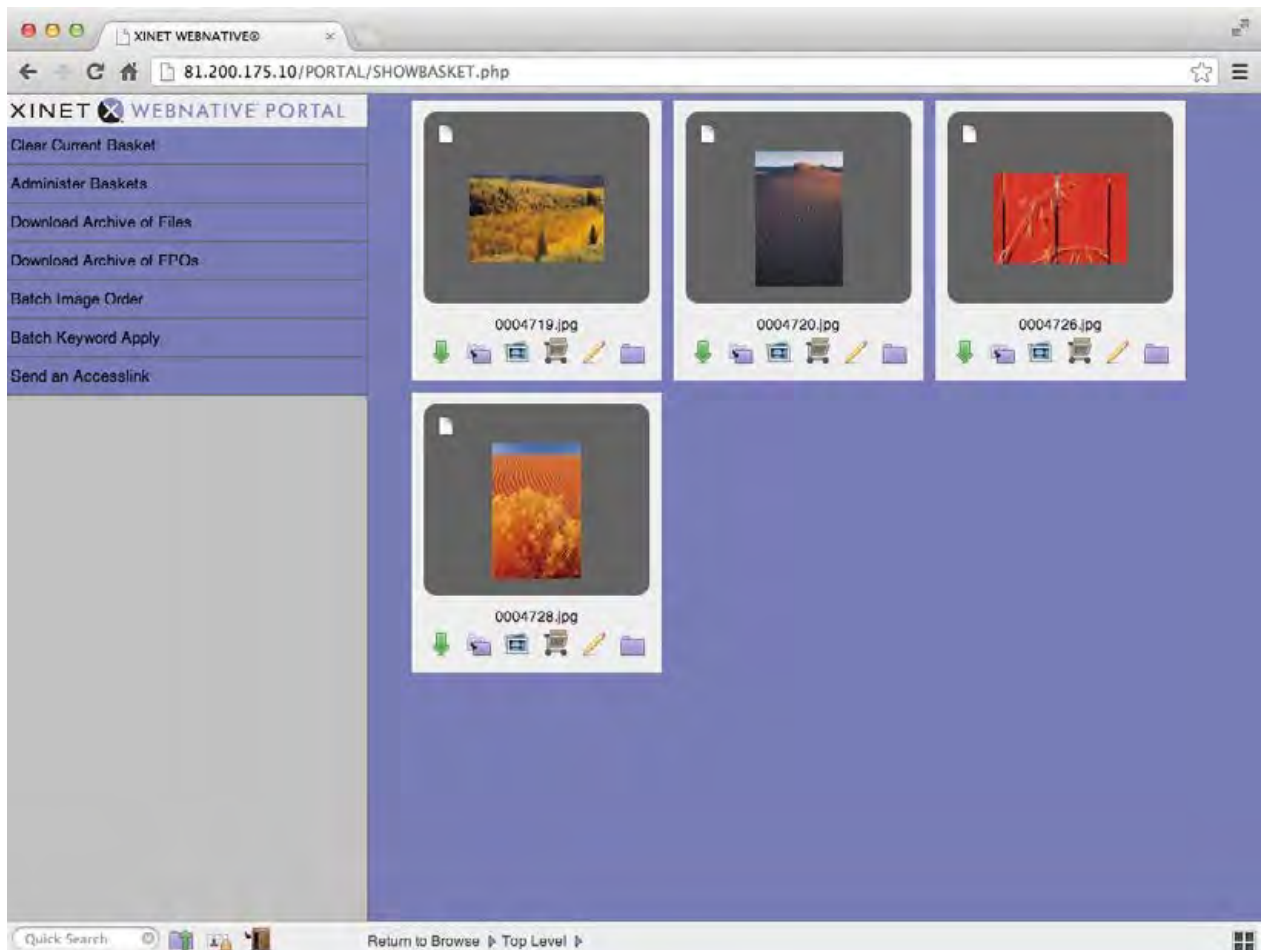
Admin emails will go to demoadmin@inpress.se. The user's email will be read from WebNative and is configured on the user account. This email will then be passed to the mailcomment setup for the temporary account.

3. Using the Asset review plugin to send an Asset Review invite to a non-user

The plugin's user (john.doe) adds assets to the basket and then launch the Asset Review plugin (named "Send an Assetlink" as title in the plugin which reflect on the display in Portal).

An accesscode is given as well as an expiry date and a note.

The email is sent to demo@inpress.se.



Link to the Asset review plugin in Portal, using the custom title from the InterAct setup.

Send an Accesslink

▼ 4 files (2.69 Mb).

Access code:

Expiry time*:

E-mail*:

E-mail message:

These are the proposed images for the campaign. Take a look and get back to me. /JD

Using the plugin to create the asset review and send the link in the email.

Several emails are sent.

demo@inpress.se gets the link and a second email with the access code.

demoadmin@inpress and the user, *john.doe@inpress.se* gets admin copies of the link email with some additional information.



Link email

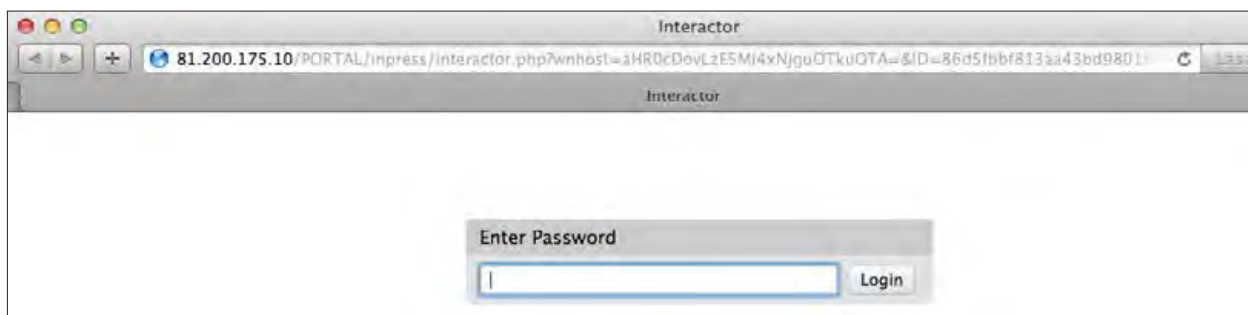


Password email



Administrator note

The reviewer clicks the link in the email which takes him to the landing page. Since an access code has been used, he also need to supply the password before being able to launch the actual review.

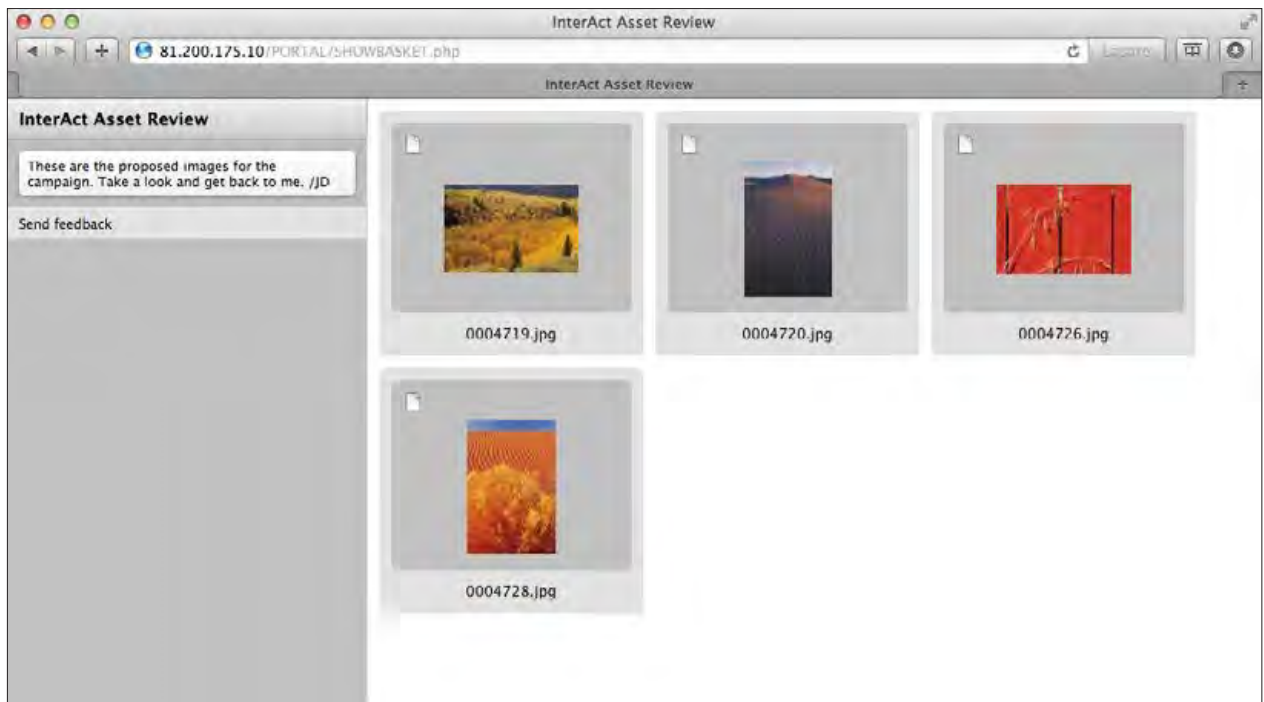


Landing page for Asset review

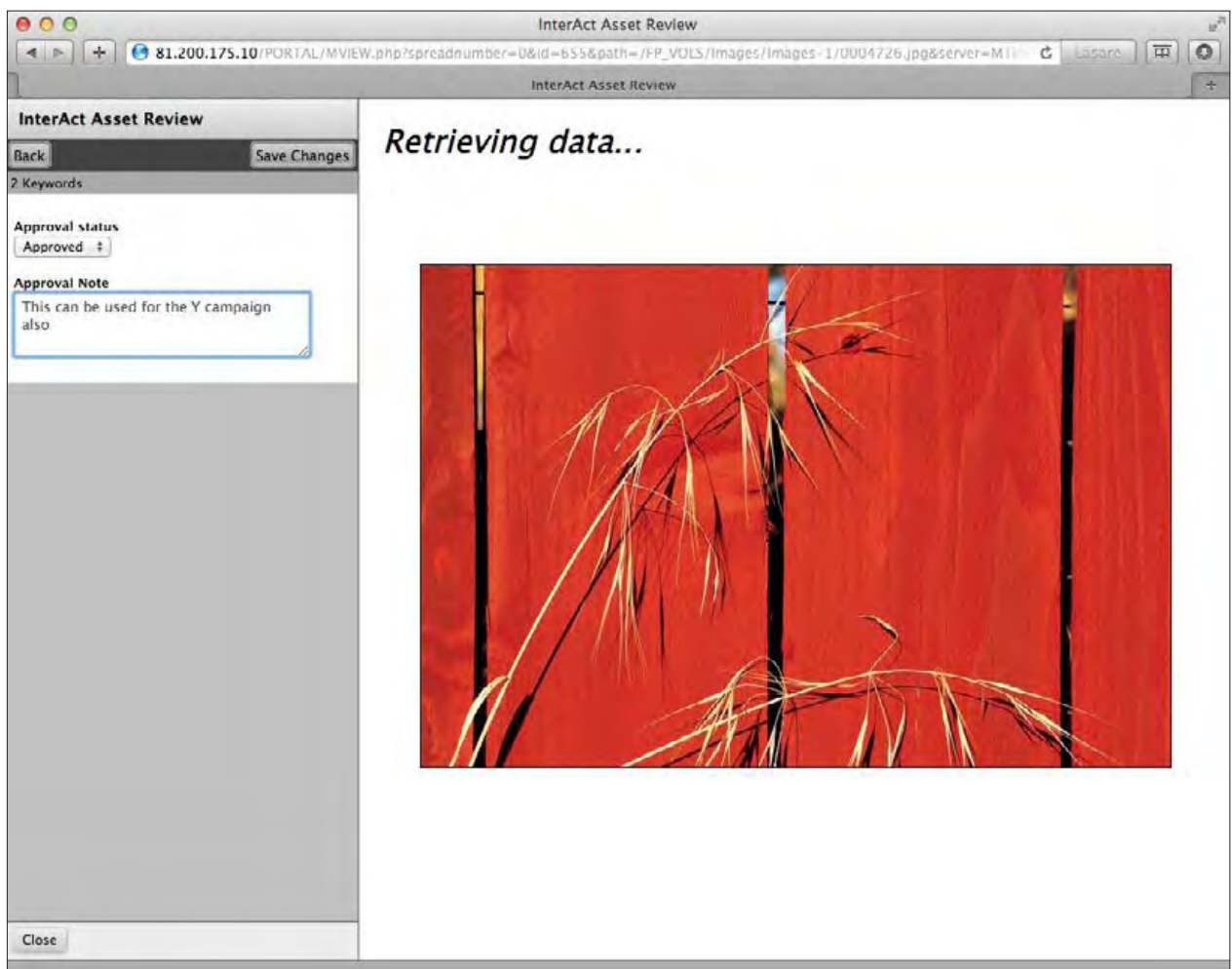


After supplying access code

When the reviewer is opened, it is possible to access the asset options (keywords, etc.) and basket plugins that were assigned on the original template user setup.

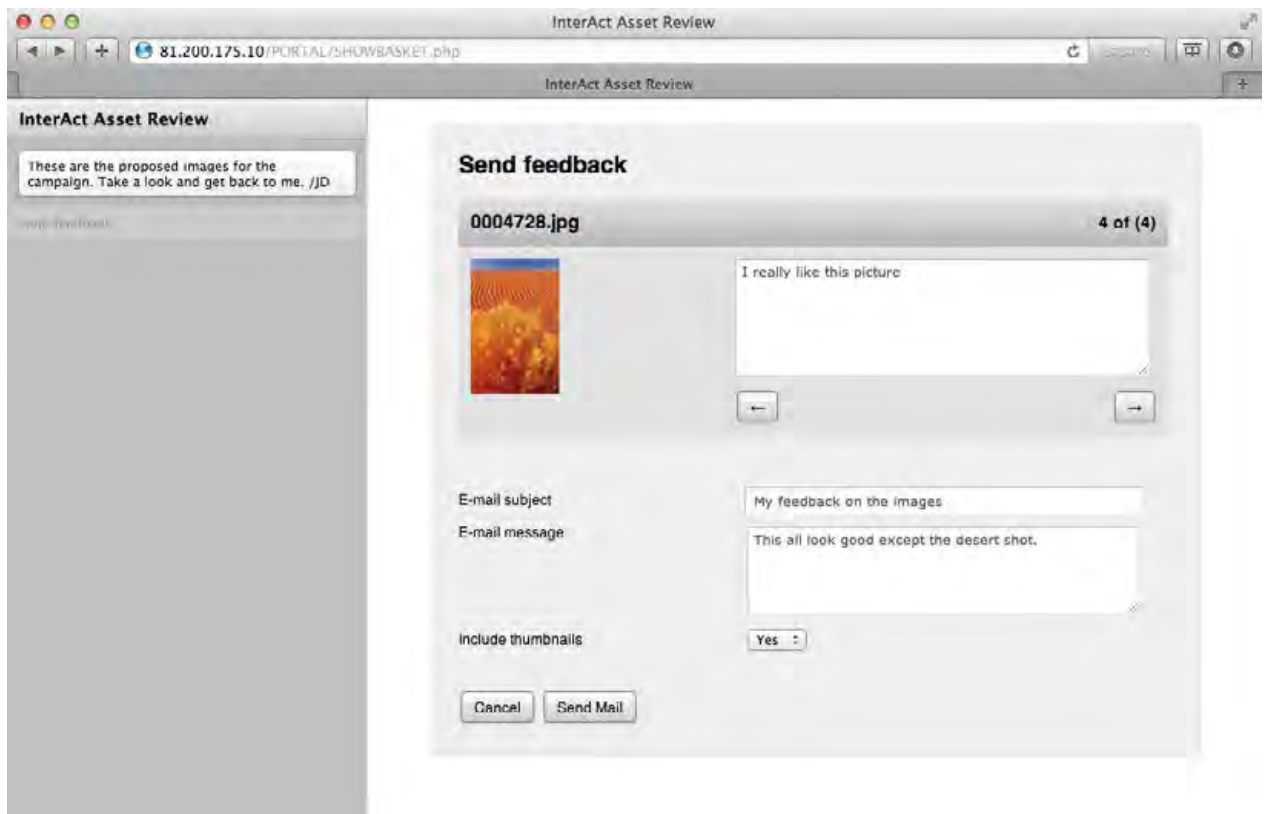


The Asset Review layout



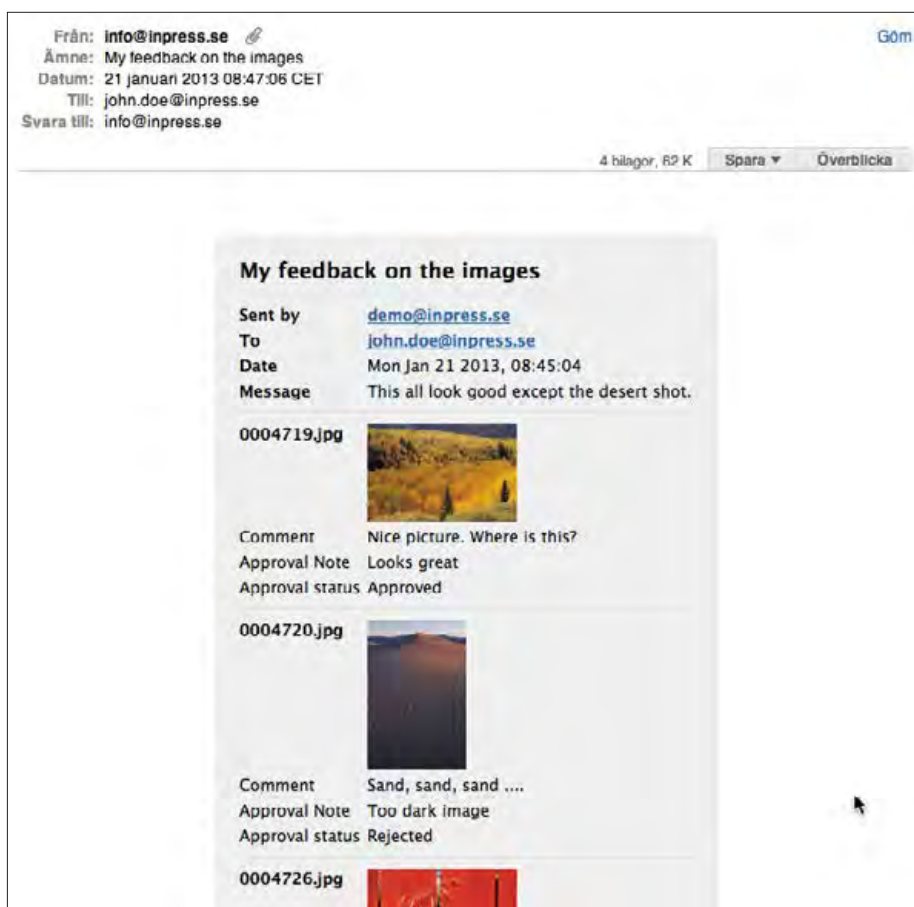
Using Metadata functionality in Asset review layout

Use keywords with triggers and actions, annotations or plugins to send feedback to the original user.



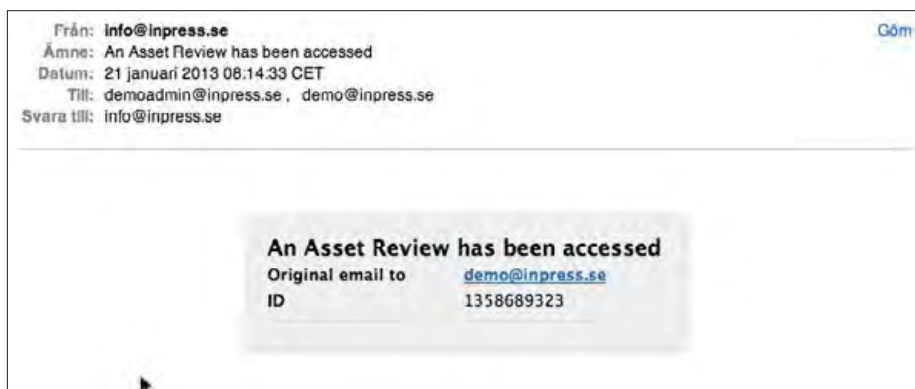
InterAct Mail comment plugin in the Asset Review layout

The send mailcomment plugin can send its own comments along with thumbnails and WebNative keyword data in the email.



Part of email from the InterAct Mail comment plugin

The Asset Review setup can also be configured to email the administrator when a user utilize the link to access the Assets:



Admin note when someone has accessed the reviewer

4.3.2 InterAct Asset Request

The Asset request plugin is used to send a link in an email which is used to upload a zip-archive of assets to the server. The upload is set to be active for a certain time before expiring and the link can only be used once. The person accessing the link does not need to provide user credentials and does not need to be a user on the Xinet server. An optional password can be added to protect the upload link.

The zipped archive is placed in a location decided by the administrator of the Asset request plugin or by the user sending the link. The uploaded file can be unzipped automatically. Notifications are sent by the plugin when an upload has been done.

This plugin require the use of a Xinet Portal server for the access and the Portal server needs to have InPress Portal Integration Kit (IPIK) of at least version 7.1 installed in order to work. IPIK only needs to be installed and require no configuration in order to run with Asset request.

SETUP	NOTES	DESCRIPTION
Access code	Can be passed to user	Optional password used when accessing the Asset review. If password is left empty the link will open the Asset review directly.
Expiry time	Required Can be passed to user	How long the link will be active (in hours) or the date (YYYY-MM-DD) of expiry. Use the palette icon to select entry options or... To have the ability to choose between several expiry times, create a pulldown menu by separating the options using pipe: Example: 1 day;24 2 days;48 1 week;168 or 24 48 96 ... To create a datepicker enter [date]
Xinet Server URL	Required	The URL to the Xinet server, example: http://webnative.somewhere.com. This should be the URL used from the Portal server to access the WebNative server. The user of the link has to access the link from a Portal server. This functionality does not work without a Portal server.

SETUP	NOTES	DESCRIPTION
Portal URL		<p>The URL to the Portal server, example: http://portal.somewhere.com</p> <p>NOTE: The InPress Portal kit (version 7.1 or higher) needs to be installed on the Portal server where the access is to be made.</p>
Path to collect	<p>Required Can be passed to user</p>	<p>Path to where the uploaded files end up on the server. This setting can either be a hardcoded setting made by the plugin administrator or the user of the plugin can use a navigator to select the folder where the upload will be placed.</p> <p>If User entry is set to Yes, a navigator will show up letting the plugin user select a folder where the upload should end up. The upload will be placed in a subfolder in the selected folder.</p> <p>If a hardcoded path is specified by the plugin administrator it can contain certain tokens to generate the path. See example below.</p>
Fields for collect	Can be passed to user	<p>The form where the user of the link uploads the file only contain an upload select by default.</p> <p>It is possible to type in a name of an InterAct form wizard form (created in the Form Wizard section) which will be included in the upload form for the user.</p> <p>The content of the fields will be forwarded in the email notification and can be written into a report. Form wizard fields of the type text, textarea, hidden and select are supported.</p> <p>See example below.</p>
Email	<p>Required Can be passed to user</p>	Email address where to send the Email message that includes the access link.
Email subject	Can be passed to user	Subject in email. Will default to language strings
Email message	Can be passed to user	Message in email
Notify admin	Can be passed to user	Decide whether to notify admin when Asset is uploaded. Notification will be sent to the admin email address specified on the Notification & reports tab.
Unzip upload	Can be passed to user	
IAMESSAGE	Set via Form Wizard form	The message in the landing page accessed by the link in the email. Defaults to the Email Message
IAPWMAIL	Set via Form Wizard form	<p>Change behaviour of Email notification when using an Access Code. By default, the access code is sent in a separate Email if used.</p> <p>Set to 0 to not send</p> <p>Set to 1 to send in separate Email (default behaviour)</p> <p>Set to 2 to include in same Email</p>
IAREMINDER	Set via Form Wizard form	<p>A number of hours.</p> <p>A reminder will be sent if the link has not been used before these number of hours.</p>
IAUPLREPORT	Set via Form Wizard form	Name of custom report template to be used. Needs to be saved into <code>/usr/inpress/setup/reportlayouts</code>
IAUPLREPORTPATH	Set via Form Wizard form	Path where to write the report to. Follows the same rules as other dynamic InterAct paths. Tokens that can be used are listed in section 4.3.2.2

4.3.2.1 Example: InterAct Asset request

Using the following setup for the plugin:

- User entry/decision on Access code
- Use a date picker to select the expiration of the link
- Xinet and Portal setup
- Path to collect to will be given when plugin is used
- Fields for collect in the upload form use the Form Wizard form "Assetrequest-demo"
- Administrator (if there is an email address setup for admin or receipt) will be notified
- The file will be unzipped automatically

Argument	Title	Help	Default value	Input filter	User entry
Access code	Access code	Edit			Yes
Expiry time*	Expiry time	Edit	Use datepicker		Yes*
Xinet™ Server URL*			http://192.168.99.102		
Portal URL*			http://192.168.99.122		
Path to collect*	Path to collect	Edit			Yes*
Fields for collect	Fields for collect	Edit	Assetrequest-demo		Yes
E-mail	E-mail	Edit			Yes
E-mail subject	E-mail subject	Edit	Submit your files		Yes
E-mail message	E-mail message	Edit	Use the link to access the upload form. Select the zip file, enter the information and upload.		Yes
Notify Administrator	Notify Administrator	Edit	On upload		
Unzip upload	Unzip upload	Edit	Yes		

Sends a link to request an upload of a zipped file. The link can have an optional password.

A normal setup for Asset link using a setup with WebNative and Portal server.

Project ID* (PROJECTID)

Name of supplier (SUPPLNAME)

Comments (COMMENTS)

Dismiss Save

The form wizard form Assetrequest-demo specified on the Assetrequest plugin setup.

InterAct Asset request plugin does not operate on anything in the basket. If your site is setup with IPIK the plugin will appear in the InPress tab (looks different in Xinet 18/Marquee and Exhibit). It can also be found in the basket.

The plugin interface will look something like the following:

InterAct Asset Request

Access code: 123456

Expiry time*: 2015-09-13

Path to collect*: Volumes : Jobs : Uploadarea | Select Folder

Fields for collect: Assetrequest-demo

E-mail: demo@inpress.se

E-mail subject: Submit your files

E-mail message: Use the link to access the upload form.
Select the zip file, enter the information and upload.

Cancel Send Maillink

The interface as a result of the settings above

Clicking “Send Maillink” with the configuration above, will result in two emails being sent.

info@inpress.se
Title: demo@inpress.se
Svara till: info@inpress.se
Submit your files

Asset upload has been requested

Date: Tue Sep 08 2015, 12:15:22
Ordername: Jorgen.1441707322
Valid for: 131 hours
Expires: 2015-09-14 00:00
Message: Use the link to access the upload form.
Select the zip file, enter the information and upload.
Access password: 123456

info@inpress.se
Title: demo@inpress.se
Svara till: info@inpress.se
Submit your files

Asset upload has been requested

Date: Tue Sep 08 2015, 12:15:22
Ordername: Jorgen.1441707322
Valid for: 131 hours
Expires: 2015-09-14 00:00
Message: Use the link to access the upload form.
Select the zip file, enter the information and upload.

[Upload File \(zip only\)](#)

Two emails are sent. One with a link and one with the access code

Resulting in a link that is accessed and the form for uploading a file being shown:

192.168.99.122

Interactor

Enter Password

..... Login

A login form is displayed when there is a password supplied in the original request. If not, it goes directly to the next step:

Upload asset

Use the link to access the upload form. Select the zip file, enter the information and upload.

Select the file to upload. Only zipped files can be selected.

Select file ... Projectimages.zip

Project ID*

2015-09-10001

Name of supplier

John Doe

Comments

These are the files to choose from.

Upload

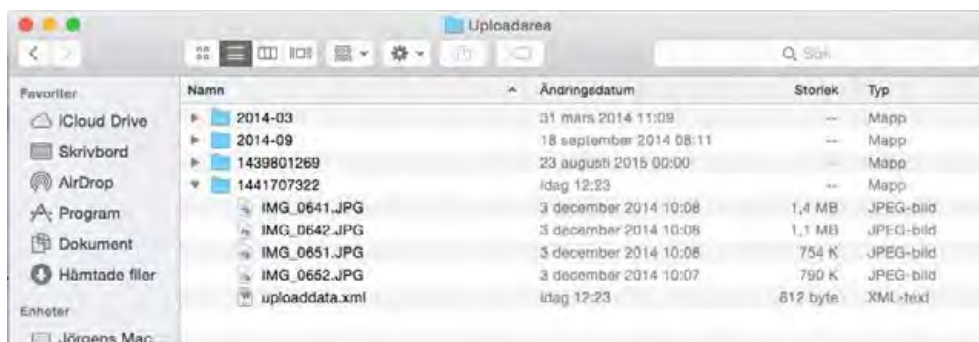
The form contains the original text in the request and a file selector for selecting a single zip file. In addition to that, the fields from the form wizard are displayed.

Upload asset

✓ Your upload was successful.

And the upload is done

The files are routed to the destination folder initially decided by the plugin user and they are unzipped and placed in a subfolder named as the original InterAct request. The data is written to an XML report.



The files are unzipped and routed to the destination folder.

4.3.2.2 InterAct Asset request advanced setup

The Asset request plugin have advanced setups for controlling the following features:

- The path where upload is collected to
- Format and location for the upload report

The path where the upload is collected to can be decided by the user of the plugin (as in previous example) or by the plugin administrator. The plugin administrator can type in a static path

in which case the plugin user do not have to make the selection. The upload behaves in the same way but the path to the collect is static.

It is also possible to use a dynamic path, using data from the upload to build the path. The path should then be specified as a series of segments concatenated by “&” characters. There needs to be at least one “&” in the path in order to generate a dynamic path.

InterAct will parse the string and substitute values for each segment. It recognizes some data from the original InterAct request as well data given from the upload form (ie the seleted Form Wizard). It also recognizes the date() function. If it doesnt recognize a specific segment it will be assumed to be a static segment. Example:

Upload path from admin GUI:

```
/FPVOLS/Jobs/Uploadarea/&date()&/&order.name
```

Will translate to the following path, given that the current date is September 8, 2015 and that the original interAct order was johndoe.1441717262

```
/FPVOLS/Jobs/Uploadarea/2015-09-08/johndoe.1441717262
```

Note that when the path is dynamic, there will be no automatic subfolder created.

Available tokens for the path are as follows:

TOKEN / FUNCTION	DESCRIPTION
orderid	The id from the original InterAct order, also being used to the default name of the folder enclosing the uploaded files.
order.name	The ordername from the original InterAct order: user.ID
origmail	Original email where the link was sent to
message	Original message. Can be multiple lines
userdata.FIELDNAME	Userdata collected from the upload form. FIELDNAME = name in the form wizard setup
date(FORMAT)	Date function. Default format is YYYY-MM-DD See appendix for formats

InterAct will write a report when the upload happens. The default behaviour is to write the report into the same folder where the files gets collected to. The format is an XML file. The function to write the report is the same as all the other reporting functions of InterAct building on a templating technique.

The format and location of the upload report can be changed using custom report templates as well as path. The custom setups IAUPLREPORT and IAUPLREPORTPATH listed in the table above (posted via a Form Wizard) can be used to change the report template and the report path.

The default report template is installed as /usr/inpress/setup/reportlayouts/iauploadreport.xml. The custom report template should be saved to the same directory and the filename posted in the IAUPLREPORT field.

To change the path, specify the path in the IAUPLREPORTPATH post. The path can be a dynamic path using path dynamics like the upload path above as well as the same tokens. Report content and path variables are the same as the upload path variables above with the additions below:

TOKEN / FUNCTION	DESCRIPTION
uploadutime	Time of upload expressed as UNIX time stamp
uploadtime	Time of upload expressed as 24 hour time HH.MM.SS
uploaddate	Date of upload expressed in iso date: YYYY-MM-DD

TOKEN / FUNCTION	DESCRIPTION
uploaddatetime	Date and time of upload expressed as: YYYY-MM-DD HH.MM.SS
file@	File list index
file@.name	File name in ISO
file@.path_xin	File path encoded as Xinet filepath

4.3.3 InterAct Share basket

InterAct Share Basket will transfer the current selection of assets in the basket to another user (or users) and save the basket under a new name. After saving the basket an email notification will be sent to an email address (or addresses) of choice notifying the arrival of a saved basket.

The basket can also be made to expire after a certain period of time.

The saved basket ends up in the recipient's basket administration tool as a saved basket that can be loaded.

The plugin operates in single or multiple recipient modes. In the multiple mode, it is possible to add multiple recipients of the basket. In this case, the user needs to select and add each user that should be shared to.

SETUP	NOTES	DESCRIPTION
To User	Required Can be passed to user	<p>The user who to share the basket with. The palette provides shortcuts to the options below</p> <p>Make a select by listing usernames pipe separated: name1 name2 name3...</p> <p>Directive [groupmembers] will create select from all usernames in user's primary group.</p> <p>Directive [groups:group1,group2] will create select from all usernames in groups group1 and group2.</p>
Basketname	Can be passed to user	<p>Name of saved basket.</p> <p>The argument can take tokens inside the name that come from other sources as well as the date() function. Example: user.name&_&date(%Y-%m-%d:%H.%M) will create a basket name like adam_2009-03-17:13.11</p> <p>Defaults to: Shared basket from USER</p>
Email	Can be passed to user	<p>Email where to send notification Normally, the email will be picked up from the user's email setting in WebNative.</p> <p>If email starts with "@" it will be assumed that the name of the user the basket was saved to should be used to prefix the email to make up the complete address. Example: To user is "john.doe". The value of Email is "@company.com". The action will send to "john.doe@company.com"</p>
Email subject	Can be passed to user	Subject in email
Email message	Can be passed to user	Message in email

SETUP	NOTES	DESCRIPTION
Append to basket	Can be passed to user	Method to handle duplicate baskets. Append - will add the new files to any existing basket with same name Dont Append - will add a -N extension to the name to avoid adding to existing basket with same name Replace - will replace any existing basket with same name
Multiple recipients		Method to select recipients. Single - will allow only one recipient of email and basket Multiple - allow for selecting more than one recipient for basket and email.
Expiration	Can be passed to user	Expire a basket after a certain number of hours. Value has to be a number larger than 0 Type in pipe-separated list to generate a select. Example: - 12 24 48 or: None; 1 day;24 2 days;48 1 week;168
Notify admin	Can be passed to user	Send a copy of the email to the plugin adminemail and receipt email

» Modify "john.doe" - "InterAct Share Basket"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language eng

Argument	Title	Help	Default value	Input filter	User entry
To user*	To user	Edit	Select from primary - plugin user		Yes*
Basketname	Basketname	Edit			Yes
E-mail	E-mail	Edit			Yes
E-mail subject	E-mail subject	Edit			Yes
E-mail message	E-mail message	Edit			Yes
Append to basket	Append to basket	Edit	Replace		
Multiple Recipients			Multiple		
Expiration	Expiration	Edit			
Notify admin	Notify admin	Edit	No		

This action copies the current basket to the selected user, saves it as a new basket with the specified name.

If an email is specified, it also sends a notification with the typed in message (or a standard message).

Configuring share basket to use the usernames from primary group, in multiple mode and without expiry

With the configuration above the resulting plugin looks like this:

InterAct Share Basket

► 4 files (3.45 Mb)

To user*

E-mail

Basketname

E-mail subject

E-mail message

Interface from Share basket

To user*

E-mail

demo [demo@inpress.se]

mickey.mouse [mm@ducksburg.net]

Adding more recipients ...

When baskets are saved the email notification will be sent ...

Från: info@inpress.se
 Ämne: Project 123
 Datum: 21 januari 2013 10:51:31 CET
 Till: demo@inpress.se
 Svaret till: info@inpress.se

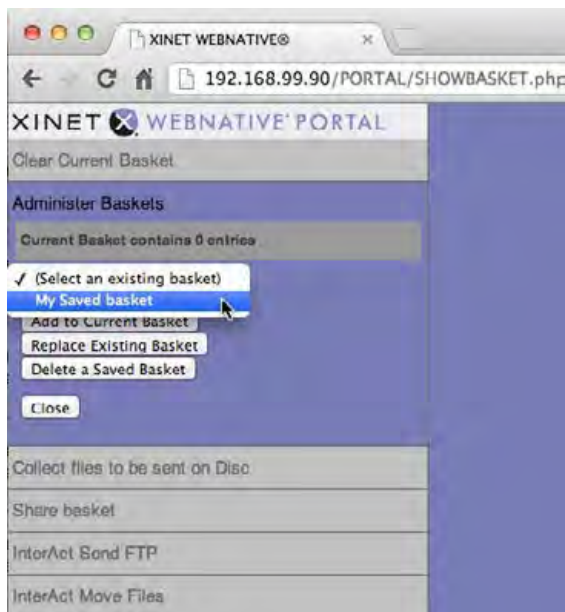
Project 123

Date: Mon Jan 21 2013, 10:47:32
 User: john.doe
 Saved to: demo
 Expires: 0 (hours)
 Basketname: My Saved basket
 Message: Hello, I am saving some images for you that were recommended for use in 123. //JD

Files
 IND_007.JPG
 SCI007.JPG
 SCI042.JPG
 SNET_07.JPG

Email from sharebasket

And the basket picked up from the basket administrations area



Loading a shared basket

4.3.4 InterAct Mail Comment

InterAct mail comment is used to collect information and send an email. Information can be collected per file. The email may include inline versions of the asset thumbnails and values from selected keywords.

When using database export (on the notification & reports tab), the export file will be attached to the email.

SETUP	NOTES	DESCRIPTION
Email	Can be passed to user	Email address where to send notification
Email subject	Can be passed to user	Subject in email
Email message	Can be passed to user	Message in email
Comment per file		Enable comment per file. The assets can be “flipped” through one by one and comment be given per asset.
Include thumbnails	Can be passed to user	Thumbnails of images will be included inline in the mail
Include keywords	Can be passed to user	List keyword names to include or use the palette to set “all user keywords” in which case all the user’s keywords on the selected database template will be shown. If user entry is selected, the keywords will be listed with checkboxes so the user can select what keywords values to include.
Apply comment to keyword		Select a keyword where to write the comment to on the asset by typing in the keyword name.

» Modify "john.doe" - "InterAct Mail Comment"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language eng

Argument	Title	Help	Default value	Input filter	User entry
E-mail*	E-mail	Edit			Yes*
E-mail subject	E-mail subject	Edit	Comments from JD		
E-mail message	E-mail message	Edit			Yes
Comment per file			Yes		
Include thumbnails	Include thumbnails	Edit	Yes		
Include keywords	Include keywords	Edit	All user keywords		Yes
Apply comment to keyword					

This action sends and email including information passed by the user in the form as well as the possibility to retrieve and include keyword data as well as a thumbnail. The thumbnail will be inserted into email if it is from an image or eps/pdf and requires no access to the site.

Configuring send mailcomment. User select of all keywords on the user's permission set

InterAct Send Mail Comment

SNSET_07.JPG 4 of (4)



A nice sunsest

← →

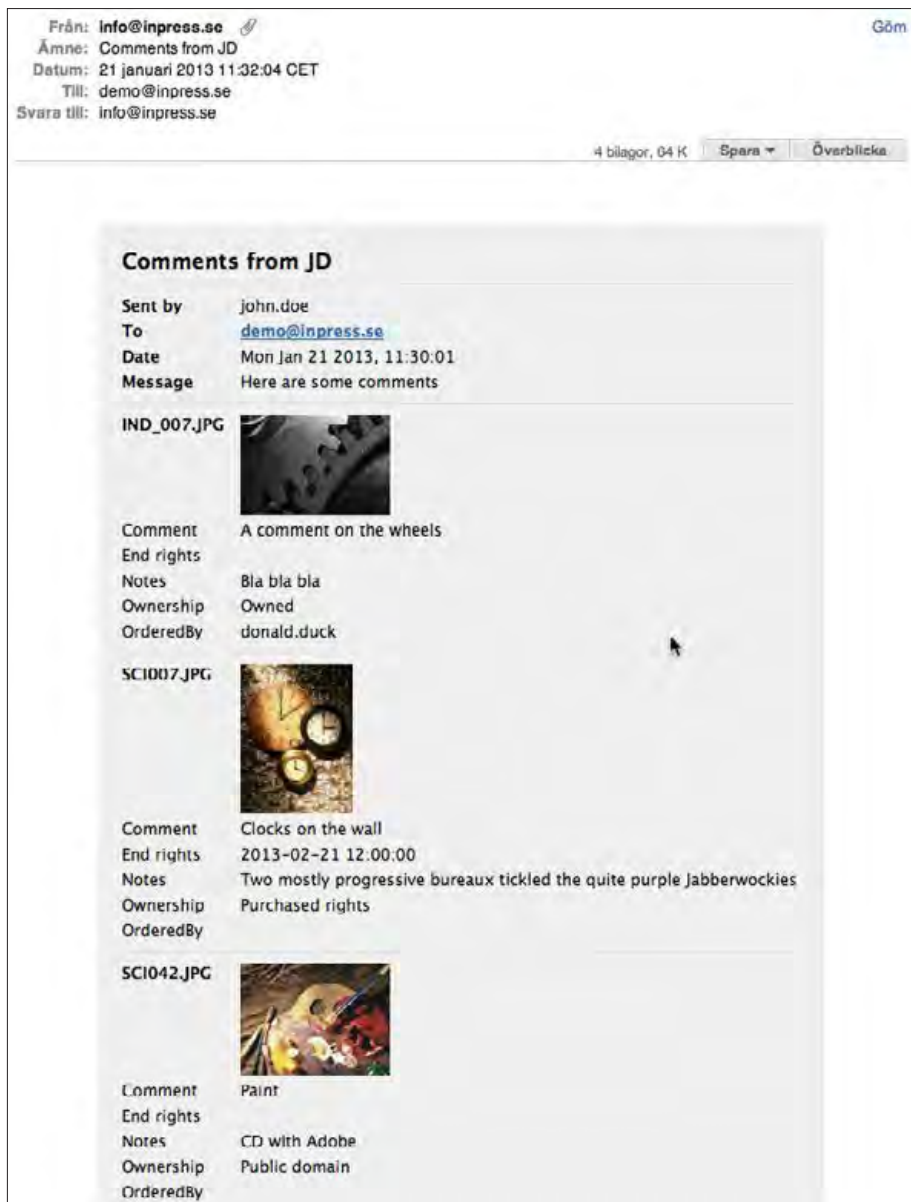
E-mail*

E-mail message

Include keywords

- ☒ End rights
- ☒ Notes
- ☒ OrderedBy
- ☐ OrderedLast
- ☒ Ownership

Using send mailcomment. Adding comments on the files and selecting what keywords to include



Resulting email is sent to recipient

4.3.5 InterAct Approval request

InterAct Approval request will send an email requesting feedback using the InterAct Approval plugin (see next section).

The plugin will do some preparation of the Assets that are in the basket prior to sending the link for approval:

- 1 Move the asset. For example into a subfolder named WAITING
- 2 Set keyword values on assets
- 3 Write notes into the filecomment text
- 4 Change desktop colors on assets

The link in the email that is being sent will point directly to the Approval plugin. Accessing via the Approval plugin needs authentication and access to the asset (to be able to view).

IPIK is a requirement when accessing via a Portal server.

SETUP	NOTES	DESCRIPTION
Path to approval folder		<p>Path or subpath where to move assets while waiting to be approved. The file will not be moved if no path is given.</p> <p>Path can be a full path, relative path or a path using variable segment and functions.</p>
File Comment text		<p>Text to append in the file comment as shown in WebNative. The text can include variable segments and will be appended to existing comment. Comments are restricted to 256 characters.</p>
Database fields		<p>List the database field names and values to be updated when sending an approval request. The syntax is name=value. The value can be static or include tokens.</p> <p>Examples: Appr_status=Waiting will set keyword Appr_status to static value "Waiting" Appr_user=user.name will set keyword Appr_user to the value of the current username</p>
WebNative Server URL	Required	<p>The URL to the WebNative server, example: http://webnative.somewhere.com.</p> <p>When the user will be accessing the system via Portal, this should be the URL used from the Portal server to access the backend WebNative server.</p> <p>If the user will be accessing the WebNative server directly, this should be the URL used to access the server from the outside.</p>
Portal URL		<p>The URL to the Portal server, example: http://portal.somewhere.com</p> <p>This entry should be left empty when the user will be accessing the WebNative server directly</p> <p>NOTE: The InPress Portal kit (version 5 or higher) needs to be installed on the Portal server when accessing Asset Approval via Portal. See IPIK notes in section 7</p>
Email	Required Can be passed to user	Email address where to send the Email message that includes the access link.
Email subject	Can be passed to user	Subject in email. Will default to language strings
Email message	Can be passed to user	Message in email
FC_APPROVE	Set via Form Wizard form	Color to set on asset in finder when sent for approval use: red, orange, yellow, green, blue, purple, grey or reset

See example in next section.

4.3.6 InterAct Approval

InterAct Approval is used to collect simple Approval information and can be initiated from the Approval request plugin, from the basket inside an Asset Review session or from the basket directly.

The approval plugin collects a status of approved or rejected assets as well as any comments. It can move an asset and set keyword values into the WebNative database.

SETUP	NOTES	DESCRIPTION
Path to approval folder		Path or subpath where to move assets that was approved. The file will not be moved if no path is given. Path can be a full path, relative path or a path using variable segment and functions.
Path to rejected folder		Path or subpath where to move assets that was rejected. The file will not be moved if no path is given. Path can be a full path, relative path or a path using variable segment and functions.
File Comment text		Text to append in the file comment as shown in WebNative. The text can include variable segments and will be appended to existing comment. Comments are restricted to 256 characters.
Database fields		List the database field names and values to be updated on reject/approve. The syntax is name=value. The value can be static or include tokens like order.reffield, approval.status or approval.statustxt Examples: Appr_status=approval.statustxt will set keyword Appr_status to the approval value Appr_user=order.reffield will set keyword Appr_user to the value of the reference field in the plugin
Email	Required Can be passed to user	Email address where to send the Email message that includes the access link.
Email subject	Can be passed to user	Subject in email. Will default to language strings
Email message	Can be passed to user	Message in email
FC_APPROVE	Set via Form Wizard form	Color to set on asset in finder when approved use: red, orange, yellow, green, blue, purple, grey or reset
FC_REJECT	Set via Form Wizard form	Color to set on asset in finder when rejected use: red, orange, yellow, green, blue, purple, grey or reset
DEL_EMPTY_SRC	Set via Form Wizard form	0/1 - will delete the directory moved from if moving an asset and the directory is empty afterwards

When setting keywords and sending emails, following tokens can be used (in addition to the normal order tokens described in the section on notifications and reporting):

TOKEN / FUNCTION	DESCRIPTION
order.reffield	The "Reference" field value input by the user
order.message	Message from the plugin entry.
approval.TOKENNAME	tokens pointing to current asset when setting keywords, etc
approval.status	1=approve, 0=reject
approval.statustxt	status as text, depend on language, Approved/Rejected
approval.comment	comment on asset
approval.name	Asset name
approval.path	Asset path
approval.newpath	Asset path after move
approvalN.TOKENNAME	The same as above for emails, ie approval0.status, approval1.status...

4.3.6.1 Example: InterAct Approval Request and Approval

The following section illustrates a setup using Approval request and Approval for a simple workflow, using subfolders in the structure to signal current status in the approval steps.

The user will send email notices with links to another user that can authenticate and use the Approval plugin to Approve or Reject. Each item that is awaiting approval will be moved from its location to a subfolder named WAITING. The keyword *Approval status* will be set to Waiting as well.

When the asset is approved/rejected via the Approval plugin, it will move back to the original location if approved or moved to another subfolder named REJECTED if rejected. The Approval status keyword value will also change accordingly.

1. Setting up the Approval request plugin on the user that will send requests.

Move to folder (WAITING) in same directory.

Set Approval Status to "Waiting"

The screenshot shows a web interface for configuring the 'InterAct Approval Request' plugin. At the top, there's a breadcrumb trail: '» Modify "john.doe" - "InterAct Approval Request"'. Below this are tabs: '» Base & Action', 'Display & Workflow', and 'Notification & Reports'. The 'Base & Action' tab is active. A language dropdown is set to 'eng'. The main configuration area is a table with columns: 'Argument', 'Title', 'Help', 'Default value', 'Input filter', and 'User entry'. The table contains several rows for configuration: 'Path to approval folder' (default: './WAITING'), 'File comment text' (empty), 'Database fields' (default: 'Approval status=Waiting'), 'Webnative server URL*' (default: 'http://192.168.99.90'), 'Portal URL' (default: 'http://81.200.175.13'), and three rows for email settings (E-mail, E-mail subject, E-mail message). Each email row has an 'Edit' link, a text input field, an 'Input filter' dropdown, and a 'User entry' dropdown with 'Yes' and 'No' options. At the bottom, a note states: 'This action will send a link to load assets into the InterAct Approval plugin.'

Argument	Title	Help	Default value	Input filter	User entry
Path to approval folder			./WAITING		
File comment text					
Database fields			Approval status=Waiting		
Webnative server URL*			http://192.168.99.90		
Portal URL			http://81.200.175.13		
E-mail	E-mail	Edit			Yes
E-mail subject	E-mail subject	Edit	Approval request		
E-mail message	E-mail message	Edit			Yes

Approval request setup

2. Setting up the Approval plugin on the user receiving requests.

Move back one level when approved.

Move to folder (REJECTED) in same level as WAITING.

Set Approval Status to "Approved" or "Rejected"

Use the DEL_EMPTY_SRC setup set to 1 to delete any empty folders when moving. This setup is added via a form wizard form: approval_setups

» Modify "demo" - "InterAct Approval"

» **Base & Action** Display & Workflow Notification & Reports

Language eng

Argument	Title	Help	Default value	Input filter	User entry
Path to approved folder			../		
Path to rejected folder			../REJECTED		
File comment text					
Database fields			Approval Status=approval.statustxt		
Reference	Reference	Edit			Yes*
E-mail	E-mail	Edit	john.doe@inpress.se		
E-mail subject	E-mail subject	Edit	Approval update		
E-mail message	E-mail message	Edit			Yes

This action will approve or reject one or more assets. The process includes some or all of following steps: moving asset, updating comment, keywords and finder color and sending an email notification.

Setup of Approval plugin

» Preview of form "Approval_setups"

» [Add comment]

[Hidden field] - DEL_EMPTY_SRC = "1"

[Modify](#) [Delete](#)

DEL_EMPTY_SRC set to 1 in a hidden field in a form wizard form: Approval_setups

» Modify "demo" - "InterAct Approval"

Base & Action » **Display & Workflow** Notification & Reports

Orderform main title (InterAct Approve) - From language file.

Additional form Approval_setups [\[edit\]](#)

Approval_setups form wizard form associated with the Approval plugin

3. Sending the Approval request.

Three items are placed in the basket. The files are in the same folder on the filesystem.


Namn	Ändringsdatum	Storlek	Typ
0004654.jpg	27 feb 2012 13:50	686 K	JPEG-bild
0004718.jpg	27 feb 2012 13:50	631 K	JPEG-bild
0006613.jpg	27 feb 2012 13:50	873 K	JPEG-bild
0006634.jpg	27 feb 2012 13:50	229 K	JPEG-bild


Files in a folder


A request is sent.

Request Approval

▼ 3 files (1.65 Mb).

 0004718.jpg
0.6 MB

 0006613.jpg
0.83 MB

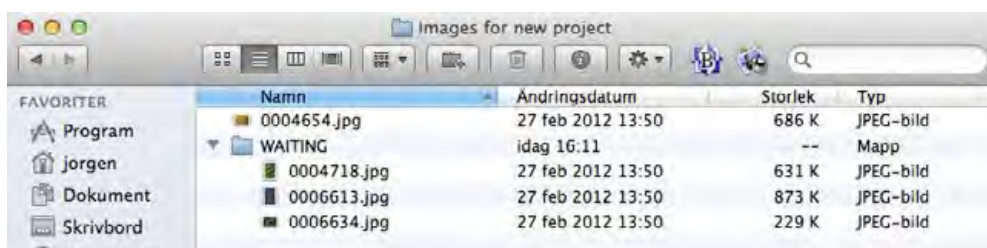
 0006634.jpg
0.22 MB

E-mail:

E-mail message:

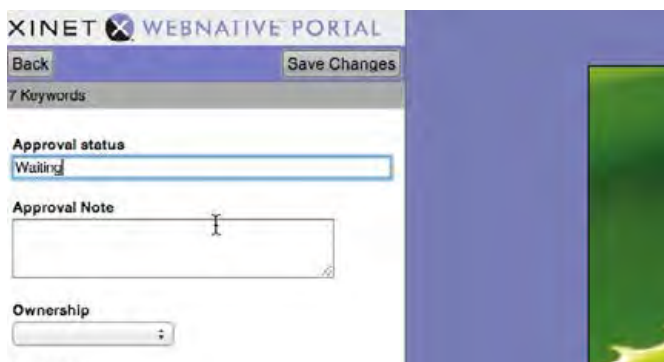
Send Approval request for the three files

When processed, the files are moved to a subfolder and the keyword Approval status set.



Namn	Ändringsdatum	Storlek	Typ
0004654.jpg	27 feb 2012 13:50	686 K	JPEG-bild
WAITING	idag 16:11	--	Mapp
0004718.jpg	27 feb 2012 13:50	631 K	JPEG-bild
0006613.jpg	27 feb 2012 13:50	873 K	JPEG-bild
0006634.jpg	27 feb 2012 13:50	229 K	JPEG-bild

The three files are moved to a subfolder WAITING (that is automatically created)



XINET WEBNATIVE PORTAL

Back Save Changes

7 Keywords

Approval status:

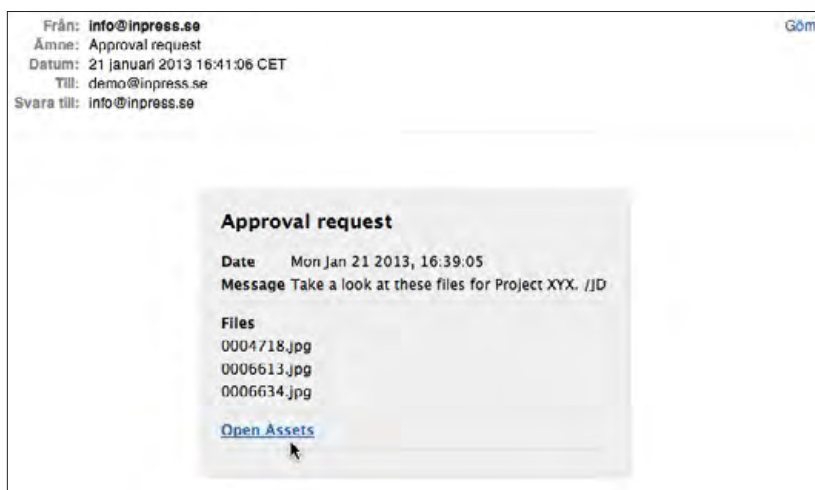
Approval Note:

Ownership:

Approval status keyword is set to "Waiting"

4. Responding to the Approval request.

An email is sent to the user that should approve.



Från: info@inpress.se
Ämne: Approval request
Datum: 21 januari 2013 16:41:06 CET
Till: demo@inpress.se
Svara till: info@inpress.se

Approval request

Date: Mon Jan 21 2013, 16:39:05
Message: Take a look at these files for Project XYX. /JD

Files:
0004718.jpg
0006613.jpg
0006634.jpg

[Open Assets](#)

Approval request email with link

Click the link to get to the site and enter the user account credentials.

User session has expired

Username

Password

Enter username and password

The link will go directly to the InterAct Approval plugin. Step through the assets, giving Approval status and any comment.

InterAct Approve

0004718.jpg

Reference*

E-mail message

InterAct Approve

0006613.jpg

Reference*

E-mail message

InterAct Approve

0006634.jpg 3 of (3)

Can be used in XYZ as well.

Reference*

E-mail message

demo

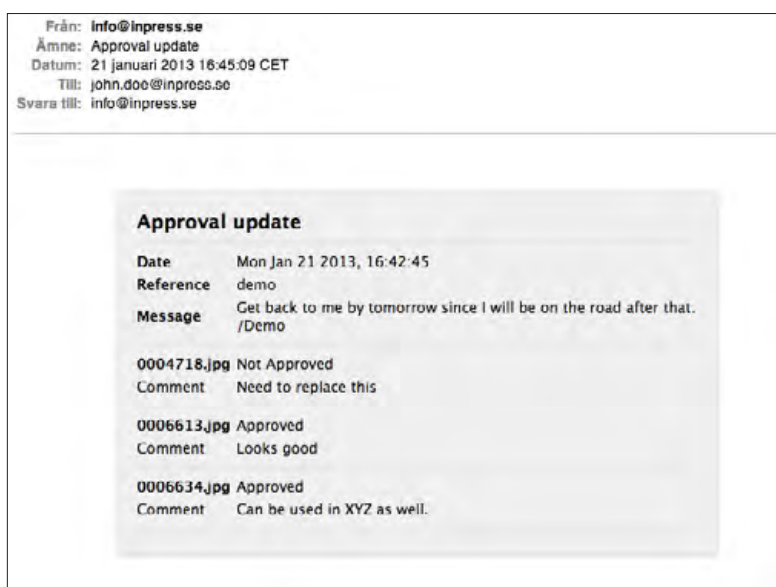
Get back to me by tomorrow since I will be on the road after that.
/Demo

Approval plugin is used to respond to the approval request. Step through the assets.

The assets are moved to the right location, empty folders cleaned out, email is sent and the keyword values updated.

Images for new project

Namn	Ändringsdatum	Storlek	Typ
0004654.jpg	27 feb 2012 13:50	686 K	JPEG-bild
0006613.jpg	27 feb 2012 13:50	873 K	JPEG-bild
0006634.jpg	27 feb 2012 13:50	229 K	JPEG-bild
REJECTED	idag 16:14	--	Mapp
0004718.jpg	27 feb 2012 13:50	631 K	JPEG-bild



4.4 Asset delivery plugins

The delivery plugins are intended for collecting assets as high res, low res or in a repurposed format for delivery. Delivery can be done in several ways: download to the WebNative user's desktop, sending to an external server, collecting on the backend server or sending to another person via a link where to get the files. In most cases the collected assets are packaged as a Zip archive.

The collection and delivery can easily be combined with an approval step using the InterAct Jobadmin plugin and additional required information can be collected using associated Form Wizard forms. Keyword data can be updated upon collection and also be included in delivery both as emails and as full exported datafiles.

4.4.1 InterAct Asset Link

The Asset link plugin collects assets (high res, low res or converted), creates a zipped archive of the collection and sends a link in an email which is used to download the archive of assets. The download is set to be active for a certain time before expiring. The person accessing the link does not need to provide user credentials and does not need to be a user on the WebNative server. An optional password can be added to protect the download.

This plugins replace the version 4 sendlink plugin and requires NO Apache setups to access certain "open" folders on disk. It also offers lots of new functionality.

SETUP	NOTES	DESCRIPTION
Access code	Can be passed to user	Optional password used when accessing the Asset review. If password is left empty the link will open the Asset review directly.
Expiry time	Required Can be passed to user	How long the link will be active (in hours) or the date (YYYY-MM-DD) of expiry. Use the palette icon to select entry options or... To have the ability to choose between several expiry times, create a pulldown menu by separating the options using pipe: Example: 1 day;24 2 days;48 1 week;168 or 24 48 96 ... To create a datepicker enter [date]

SETUP	NOTES	DESCRIPTION
WebNative Server URL	Required	<p>The URL to the WebNative server, example: http://webnative.somewhere.com.</p> <p>If the user will be accessing via Portal, this should be the URL used from the Portal server to access the WebNative server.</p> <p>If the user will be accessing the WebNative server directly, this should be the URL used to access the server from the outside.</p>
Portal URL		<p>The URL to the Portal server, example: http://portal.somewhere.com</p> <p>This entry should be left empty if the user will be accessing the WebNative server directly</p> <p>NOTE: The InPress Portal kit (version 5 or higher) needs to be installed on the Portal server when accessing Asset Review via Portal. See IPIK notes in section 7</p>
Compression method	Required Can be passed to user	Select format of compression: Stuffit sit, PC Zip, Mac ZIP, Uncompressed PC Zip, Uncompressed Mac ZIP
Archive name	Can be passed to user	Name of archive. Will default to user.SESSION.zip or whatever is setup as "Rename the collect folder" on the file tab.
Email	Required Can be passed to user	Email address where to send the Email message that includes the access link.
Email subject	Can be passed to user	Subject in email. Will default to language strings
Email message	Can be passed to user	Message in email
Notify admin	Can be passed to user	Decide whether to notify admin when Asset collection is downloaded. Notification will be sent to the admin email address specified on the Notification & reports tab.
IAMESSAGE	Set via Form Wizard form	The message in the landing page accessed by the link in the email. Defaults to the Email Message
IAPWMAIL	Set via Form Wizard form	<p>Change behaviour of Email notification when using an Access Code. By default, the access code is sent in a separate Email if used.</p> <p>Set to 0 to not send</p> <p>Set to 1 to send in separate Email (default behaviour)</p> <p>Set to 2 to include in same Email</p>
USEONCE	Set via Form Wizard form	If set to 1, the link created can only be accessed one time and automatically be locked.
IAREMINDER	Set via Form Wizard form	<p>A number of hours.</p> <p>A reminder will be sent if the link has not been used before these number of hours.</p>
MD5SUM	Set via Form Wizard form	Set to value 1 to make InterAct calculate an MD5 checksum of the zipped file and include the sum in the email that is sent.

4.4.1.1 Example: InterAct Asset Link

Using the following setup for the plugin:

- User entry/decision on Access code
- Hardcoded expiry of 24 hours
- WebNative and Portal setup
- MacZip being the default setup of compression but user will have a select
- User supply zipname
- Administrator (if there is an email address setup for admin or receipt) will be notified

» Modify "john.doe" – "InterAct Asset Link"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language

Manually authorize order ☐

Argument	Title	Help	Default value	Input filter	User entry
Access code	Access code	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
Expiry time*	Expiry time	Edit	<input type="text" value="24"/>	<input type="text"/>	<input type="text"/>
Webnative server URL			<input type="text" value="http://192.168.99.90"/>		
Portal URL			<input type="text" value="http://81.200.175.10"/>		
Compression method*	Compression method	Edit	<input type="text" value="Mac ZIP (Includes Macintosh Resources)"/>		<input type="text" value="Yes"/>
Archive Name	Archive Name	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
E-mail	E-mail	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
E-mail subject	E-mail subject	Edit	<input type="text" value="File delivery from ACME Inc"/>	<input type="text"/>	<input type="text"/>
E-mail message	E-mail message	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
Notify Administrator	Notify Administrator	Edit	<input type="text" value="Yes"/>		<input type="text"/>

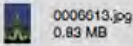
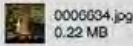
Creates a zipped archive of the assets and sends a link to download. The zipped archive is automatically removed as the link expires. The link can have an optional password.

A normal setup for Asset link using a setup with WebNative and Portal server.

The plugin interface will look something like the following:

Send files for Pickup

▼ 2 files (1.05 Mb).

Access code

Compression method*

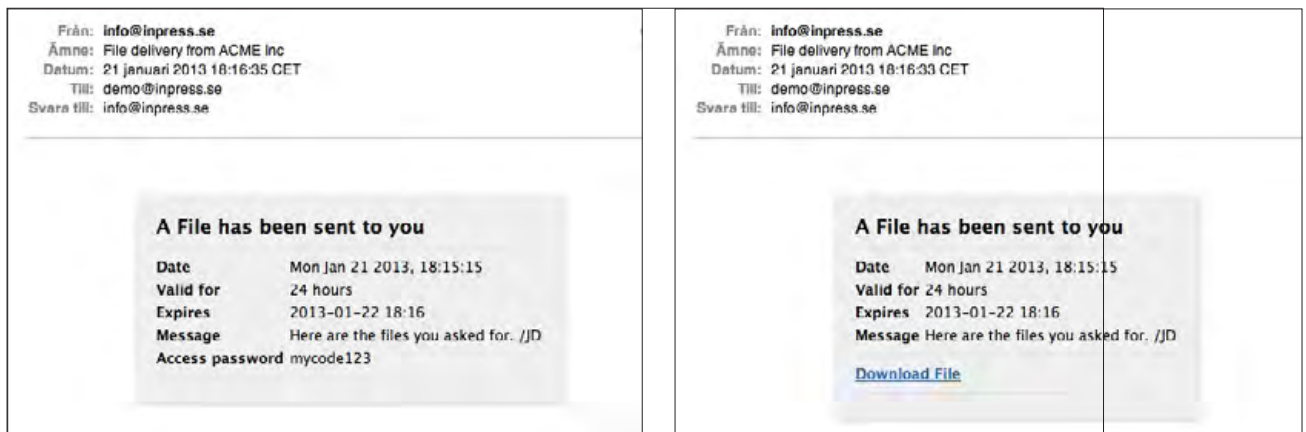
Archive Name

E-mail

E-mail message

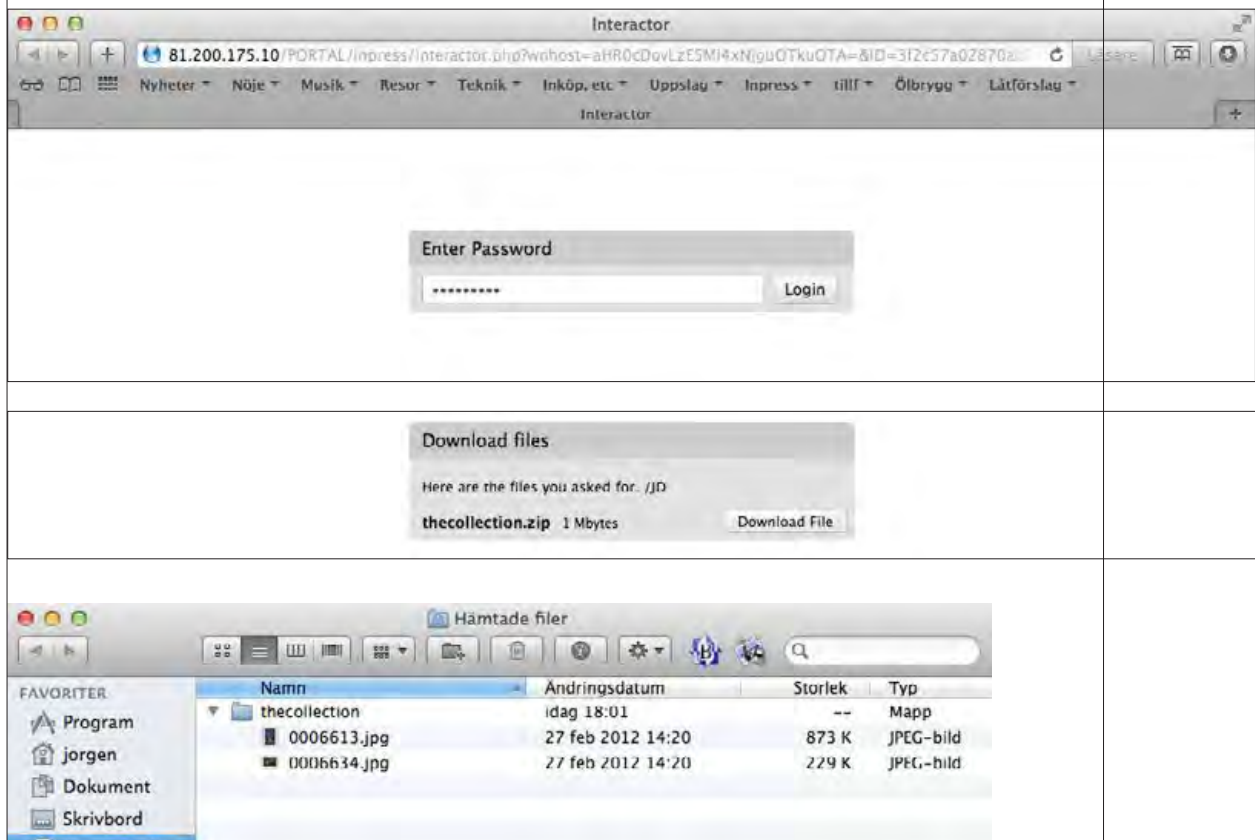
The interface as a result of the settings above

Clicking “Send Maillink” with the configuration above, will result in two emails being sent.



Two emails are sent. One with a link and one with the access code

Resulting in a link that is accessed and the files downloaded



4.4.2 InterAct Collect

InterAct Collect will collect the files in the order to an output directory. The collect folder will be named using the username + a sessionid. It is possible to change the collect name using the function to **Rename the folder enclosing the collected files** on the file tab.

Typically, the collect plugin will be used in two types of scenarios:

- Collect assets to be shipped on physical media
- Collect assets that are part of print orders

SETUP	NOTES	DESCRIPTION
Collect Path	Required	Path where to put the collected files

4.4.2.1 Example: InterAct Collect along with Form Wizard, notifications, ...

The following example uses a standard collect to get files for shipping. The plugin also has an associated Form Wizard form that collects additional data, some of which are used in renaming the collected folder. All the data is also included in the administrations email.

» Modify "John.doe" - "InterAct Collect"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language: eng

Manually authorize order: ☐

Argument	Title	Help	Default value	Input filter	User entry
Collect Path*			/FP_VOLS/OUT/InterAct		

This action copies the collected files to the output location specified in collect path.

All files are put into one folder. The name of the folder is the ordername unless it is changed using the *Rename the collect folder* function.

The collect path has to exist.

Configuring Collect to put collectfolders in /FP_VOLS/OUT/InterAct

» Modify "John.doe" - "InterAct Collect"

Base & Action » **Files, Conversion & Access** Display & Workflow Notification & Reports Database

Include linked files: ☐

Read files recursively: ☐

File filter:

Conversion: [edit]

Order fpos: ☐

Order hi-res: ☐

Rename the the collected files:

Rename the collect folder: order.PROJECTID&_&user.name&_&order.id

Supply extensions on collect: ☐

Rename the collected folder to a combination of the field PROJECTID from an attached form, the username and the id of the session. The different bits are concatenated using the underscore character.

» Modify "John.doe" - "InterAct Collect"

Base & Action Files, Conversion & Access » **Display & Workflow** Notification & Reports Database

Orderform main title: Order Assets on Media (InterAct Collect) - From language file.

Additional form: Collect_form [edit]

Window width:

Window height:

User information: Type in your full shipping address if you need assets shipped on media.

Confirmation text:

Job info for logs and messages:

Options:

- ☐ Clear basket after submit
- ☐ Close window after submit
- ☐ Autosubmit order when opening plugin
- ☐ Dont show file details in plugin window

Attached form wizard form "Collect_form", change the title to "Order Assets on Media" and add some user information at the top of the window.

» Modify "John.doe" - "InterAct Collect"

Base & Action Files, Conversion & Access Display & Workflow » **Notification & Reports** Database

Administrator mail:
☒ Notify on Order

Receipt mail:
☒ Make receipt mail dynamic
☒ Receipt on Order

Notification templates:

Reply-to mail:

Receipt template:

Receipt filename:

Report template:

Report output path:

Configure an admin for the plugin and make the Receipt mail dynamic. Make sure both the admin and the user gets notified when the order is sent.

When using the plugin, the Form Wizard form is included as well as the receipt email entry which is prepopulated with the user's webnative email if there is one. Place order.

Order Assets on Media

Type in your full shipping address if you need assets shipped on media.
 ▶ 2 files (1.05 Mb).

Receipt email:

Project ID*:

Reference*:

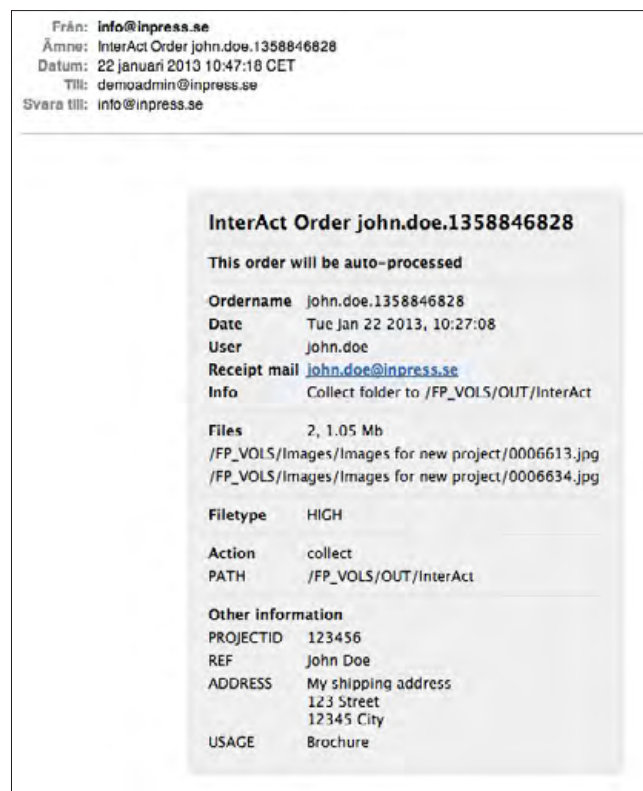
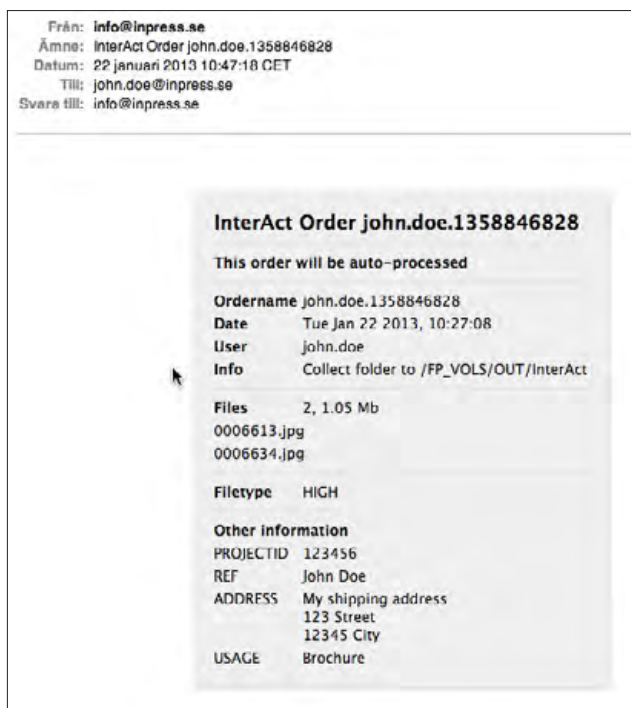
Address:

Usage:

Collect plugin with Form Wizard form and dynamic receipt email.

When the order is placed, emails will be sent to the receipt email and to the admin email. The order is collected to the designated area and the folder named accordingly.

Namn	Ändringsdatum	Storlek	Typ
HF	11 sep 2012 15:12	--	Mapp
InterAct	idag 10:19	--	Mapp
123456_john.doe_1358846828	idag 10:17	--	Mapp
0006613.jpg	27 feb 2012 13:50	873 K	JPEG-bild
0006634.jpg	27 feb 2012 13:50	229 K	JPEG-bild
Other	6 nov 2012 08:53	--	Mapp



Examples of default Admin and Receipt mails

4.4.3 InterAct Send FTP

InterAct Send FTP will compress the collected files as zip or sit and send the resulting file archive to the indicated ftp site, using the login information provided in the form. After sending the files an email notification will be sent to the specified email address. Copies of the notification will be sent to admin and/or receipt mail if they exist.

If no E-mail is set (by admin or user) no notification will be sent. If no subject or message is set, standard texts will be used.

SETUP	NOTES	DESCRIPTION
FTP Host	Required Can be passed to user	The ftp host to send to ftp://ftpserver.somewhere.com or sftp://secureserver.somewhere.com
FTP User	Required Can be passed to user	The ftp username to use for the access
FTP Password	Required Can be passed to user	Password for ftp account
FTP Remote Path	Can be passed to user	Remote path to change to after connecting to the ftp server
Compression Method	Required Can be passed to user	Method to compress the folder of the collected files.
Email	Can be passed to user	Email address where to send notification
Email subject	Can be passed to user	Subject in email
Email message	Can be passed to user	Message in email
Use Active FTP	Can be passed to user	Use Active FTP when transferring files

SETUP	NOTES	DESCRIPTION
Archive Name	Can be passed to user	Name of the archive transferred via ftp. Will default to collectname.zip, ie <i>user.id.zip</i>
MD5SUM	Set via Form Wizard form	Set to value 1 to make InterAct calculate an MD5 checksum of the zipped file and include the sum in the email that is sent.

4.4.3.1 Example: InterAct Sendbyftp

» Modify "John.doe" - "InterAct Send FTP"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language eng

Manually authorize order ☐

Argument	Title	Help	Default value	Input filter	User entry
FTP Host*	FTP Host	Edit	ftp://ftp.inpress.se		Yes*
FTP User*	FTP User	Edit	interact		Yes*
FTP Password*	FTP Password	Edit			Yes*
FTP Remote Path	FTP Remote Path	Edit			
Compression method*	Compression method	Edit	Mac ZIP (Includes Macintosh Resources)		Yes*
E-mail	E-mail	Edit			Yes
E-mail subject	E-mail subject	Edit	FTP delivery of files		
E-mail message	E-mail message	Edit			Yes
Use Active FTP	Use Active FTP	Edit	No		
Archive Name	Archive Name	Edit			Yes

This action compress the collection of files to a zip archive and transfers to an ftp site.

An optional email message is sent to a specific recipient with a notice about the transferred file including a custom message.

Configuring the Send FTP Plugin

InterAct Send FTP

► 2 files (1.05 Mb).

FTP Host*

FTP User*

FTP Password*

Compression method* Mac ZIP (Includes Macintosh Resources)

E-mail

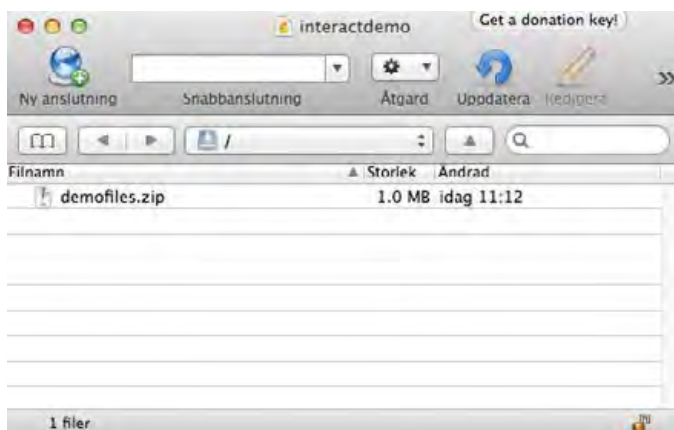
E-mail message

Archive Name

Resulting form of Send FTP



The resulting email using the default email layout



The sent file on the ftp server

4.4.4 InterAct Download Direct

Download Direct will collect all files and have them downloaded to the user's browser immediately. The functionality is the same as the normal Xinet download plugin except that it is possible to also use the InterAct functions, that include:

- Add more fields for collecting related information
- Send notifications including related information
- Write reports
- Write back to the database
- Ability to hardcode certain setups

Note that the plugin has changed since version 4.4 and now operates without the Xinet counterpart. It is now possible to use InterAct Download Direct independently without also enabling the Xinet plugin.

SETUP	NOTES	DESCRIPTION
Archive Name	Required Can be passed to user	Name of the downloaded sit/zip archive
Compression method	Required Can be passed to user	Type of compression: sit, zip, maczip, uncompressed zip, uncompressed maczip
Export XMP	Can be passed to user	Include XMP exports

» Modify "john.doe" - "InterAct Download Direct"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language eng

Argument	Title	Help	Default value	Input filter	User entry
Archive Name*	Archive Name	Edit			Yes*
Compression method*	Compression method	Edit	Mac ZIP (Includes Macintosh Resources)		
Export XMP	Export XMP	Edit	No		

This action collects assets as high res, fpos or converted files, creates a zip archive and downloads through browser. For conversion settings see appropriate tab.

In addition, it can notify, set database fields, create reports etc.

Configuring Download Direct to use Mac Zip and disabling XMP export

InterAct Download Direct

▼ 12 files (7.82 Mb).

 0006613.jpg 0.83 MB	 0006634.jpg 0.22 MB	 0004678.jpg 1.05 MB
 0004710.jpg 0.94 MB	 0004713.jpg 0.19 MB	 0004719.jpg 1.16 MB
 0004720.jpg 0.13 MB	 0004840.jpg 0.79 MB	 0004853.jpg 0.74 MB
 0004860.jpg 0.12 MB	 0004864.jpg 0.64 MB	 0004872.jpg 1.01 MB

Archive Name*

InterAct Download Direct

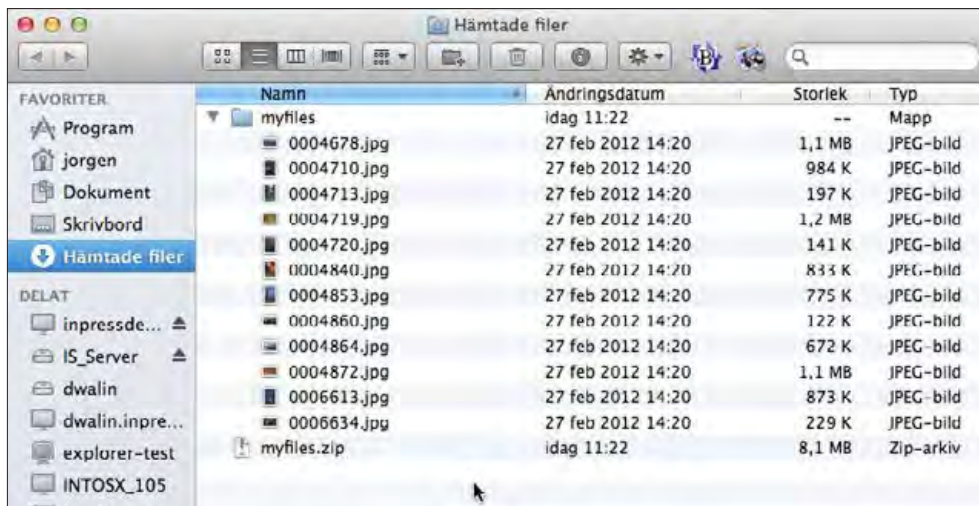
Collecting 12 files



InterAct Download Direct

Downloading files

Download filesize : 7.73 Mb



Using the Download Direct plugin to download files

4.4.5 InterAct Download FPO Direct

The Download FPO Direct plugin is identical to the Download Direct plugin except that the download is for FPO (For placement only) Low res images instead of the high res.

It allows for the same archiving options and gives the option to name the downloaded archive as well. There is no option to include XMP.

SETUP	NOTES	DESCRIPTION
Archive Name	Required Can be passed to user	Name of the downloaded sit/zip archive
Compression method	Required Can be passed to user	Type of compression: sit, zip, maczip, uncompressed zip, uncompressed maczip

4.4.6 InterAct Convert Direct

Convert Direct will convert and collect all files and have them downloaded to the user's browser immediately. The functionality is similar to the normal Xinet batch convert plugin except that it is possible to use conversionlists and all the normal InterAct functionality as well:

- Give only access to predefined conversion setups
- Add more fields for collecting related information
- Send notifications including related information
- Write reports
- Write back to the database
- Ability to hardcode certain setups

Note that the plugin has changed since version 4.4 and now operates without the Xinet counterpart. This makes it possible to use interAct download Direct without also enabling the Xinet plugin. It also eliminates the working mode configuration.

SETUP	NOTES	DESCRIPTION
Working mode	-	NO LONGER USED
Archive Name	Required Can be passed to user	Name of the downloaded sit/zip archive

SETUP	NOTES	DESCRIPTION
Compression method	Required Can be passed to user	Type of compression: sit, zip, maczip, uncompressed zip, uncompressed maczip
Export XMP	Can be passed to user	Include XMP exports
Include non-images	Can be passed to user	Include the files that can not be converted as high res files in the download, e.g. InDesign, Quark XPress.
Leave vector images unconverted	Can be passed to user	Do not convert images of vector type: PDF, Eps, etc.



*Conversion options
needs to be setup on the
Conversion tab*

Note that the conversion options come from the Conversion tab in the setup.

» Modify "john.doe" - "InterAct Convert Direct"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language

Argument	Title	Help	Default value	Input filter	User entry
Archive Name*	Archive Name	Edit	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>
Compression method*	Compression method	Edit	Mac ZIP (Includes Macintosh Resources)	<input type="text"/>	<input type="text"/>
Export XMP	Export XMP	Edit	No	<input type="text"/>	<input type="text"/>
Include non-images	Include non-images	Edit	No	<input type="text"/>	<input type="text"/>
Dont convert vector images	Dont convert vector images	Edit	No	<input type="text"/>	<input type="text"/>

This action collects assets as converted files, creates a zip archive and downloads through browser. For conversion settings see appropriate tab.

In addition, it can notify, set database fields, create reports etc.

Configuring the Convert Direct plugin

» Modify "john.doe" - "InterAct Convert Direct"

Base & Action » **Files, Conversion & Access** Display & Workflow Notification & Reports Database

Include linked files ☐

Read files recursively ☐

File filter

Conversion [edit]

☒ Order hi-res

Adding a conversion setup on the Conversions tab

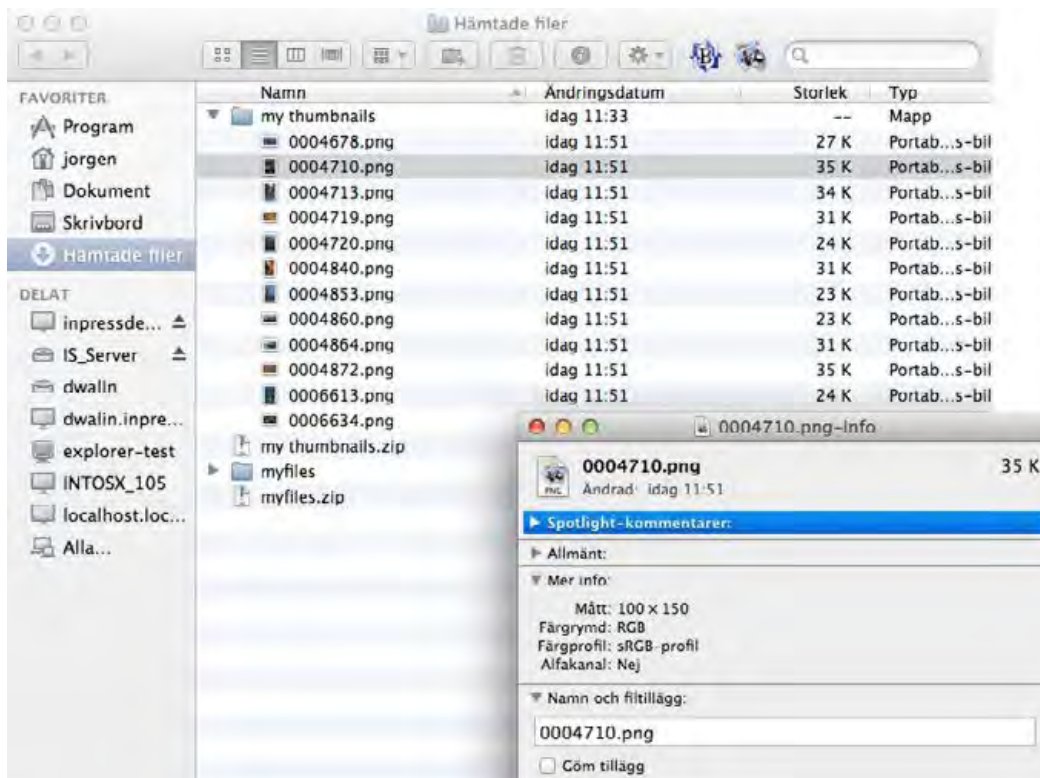
InterAct Convert Direct

12 files (7.82 Mb)

Archive Name*

Filetype

Ordering conversion using a conversionlist for conversion options



Files downloaded to desktop

4.5 Workflow plugins

The workflow plugins perform workflow related tasks like batch file move and delete, create project folders on disk and so on.

4.5.1 InterAct Project Maker

The Project Maker is a new Plugin for version 5. The functionality of Project Maker is similar to the old Client and Project Creators together and is designed to replace both of the old plugins with a single interface.

The Project maker performs the following tasks:

- Maintains the contents of the Client database: Clients and Projects
- Creates new projects by copying template structures to dynamic locations. Project Folders are named according to rules set up by the administrator. Applies WebNative keywords to the Project folder(s).
- Sends email notification to administrators.

4.5.1.1 Project Maker Overview

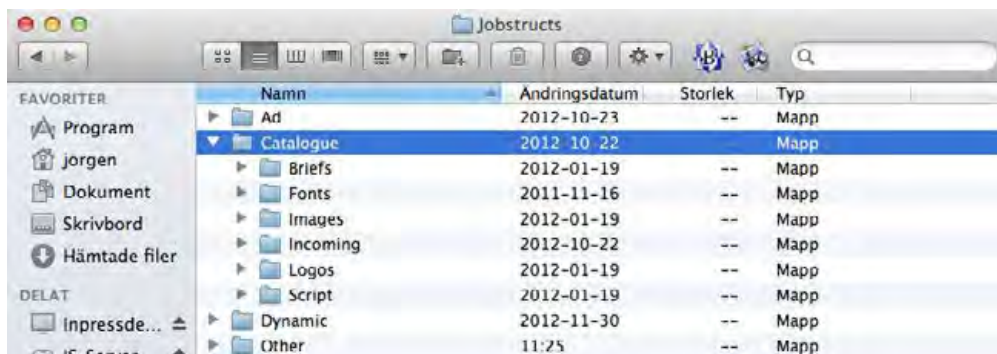
The Project Maker uses a database of Client data: Client code, Client name and Client home-path, to keep track of locations on where to create new Projects. Each client's homopath decides where the client's new Projects should be created. New clients are added to the database and existing clients can be updated from the Project Maker. When adding a new client, the user navigates to the client homefolder using the selects to browse the actual filesystem. It is possible to assign a client structure (just like the project structure) and the path to the home folder may also be configured as opposed to manually picked at the time of adding the client.



Editing the client: Giving a homedir and code/name

New Projects are created from a selection of template structures. A selected template structure is copied when a new Project is added. The new Project structure inherits the permissions from the original template structure.

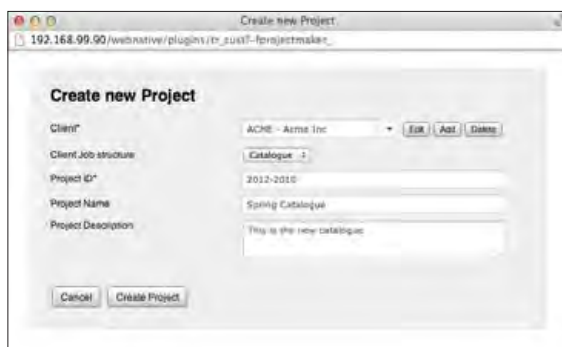
The structures are defined as “real” folder structures on the server. All template structures that should be made available need to be in the same location and this location (parent folder to the structures) should be entered in the Project Maker configuration.



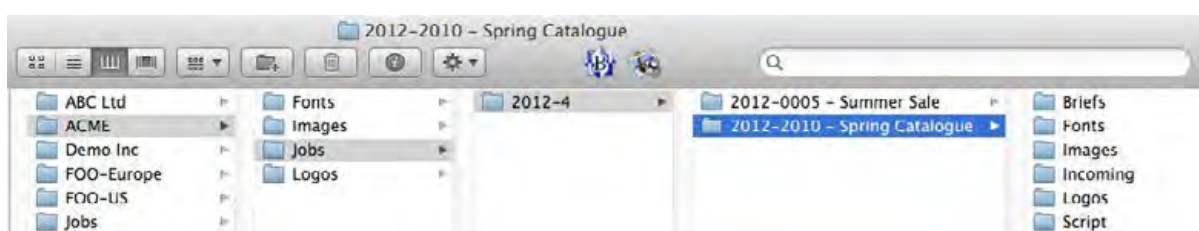
Project structures “Ad”, “Catalogue”, “Dynamic” and “Other” inside the Jobstructs folder

It is possible to use a single structure and even no structure at all. The new project will be a single folder without any substructure when no template structure is used.

New Projects are created using the Project Maker from a normal WebNative user. It is possible to assign access to the ability to “edit clients” to certain users only.



Creating a new project with Project ID, name and description.



The project is created on disk with same structure and permissions as the original template structure.

In addition to creating the structure, it is also possible to populate the Venture database with data as the Project folder is created. What fields to populate is configurable and content can be hard coded or dynamic.

XINET WEBNATIVE PORTAL

Back Save Changes

5 Keywords

Save to WebNative Suite database only. XMP write back is not supported for this file

Jobnumber
2012-2010

Jobdescription
Spring Catalogue

Jobstatus
1 Waiting

Jobcreated
December 17, 2012 Today

Jobfolder
☒

Keywords added to the Project folder

The behaviour and selection of options is configured using the InterAct administration. Configuring the Project Maker can be done on different levels depending on the requirements.

InterAct Administration

Users & Plugins Actionlist Conversionlist Form Wizard WebServices

» Modify "jorgen" - "InterAct Project Maker"

» **Base & Action** Display & Workflow Notification & Reports

Language eng

Argument	Title	Help	Default value	Input filter	User entry
Subfolder selections			Projects Projects-Quarterly;Projects/%Y-%q Projects-M		
Path to project structures			/FPVOLS/Jobs/Jobstructs		
Database fields			Jobnumber=PROJID Jobdescription=PROJDESC		
Edit Clients			Yes, and view Project history		
Client*	Client	Edit			Yes*
Project ID*	Project ID	Edit			Yes*
Project ID control			Do not allow duplicates		
Project Name	Project Name	Edit			Yes
Project Description	Project Description	Edit			Yes
Custom Folder or Path					
Custom Project path 2					
Path to job structure 2					
Database fields, 2					
Path to client structures			/FPVOLS/Jobs/Clientstructs		
Client home path					
Jobticket file			jobticket.xml		
Creates a new projectfolder					

Dismiss Save

A simple example of a Project Maker setup. The "path to jobstructures" point to the folder that contain the different structures, subfolder selections defined and some database fields have been configured.

4.5.1.2 Default Project Paths and folder names

The Project Maker will create one or more folders for each Project. The main project folder will be created at a default location with a default name unless a custom path has been specified. The second folder will only be created if there is a custom path setup for the second folder.

The default location for the main project folder is

Client Home folder + Subfolder

“/raid/clients/A-E/ACME” + “Jobs/2012-4”

The default name of the main project folder is

Project ID + “ - ” + Project name

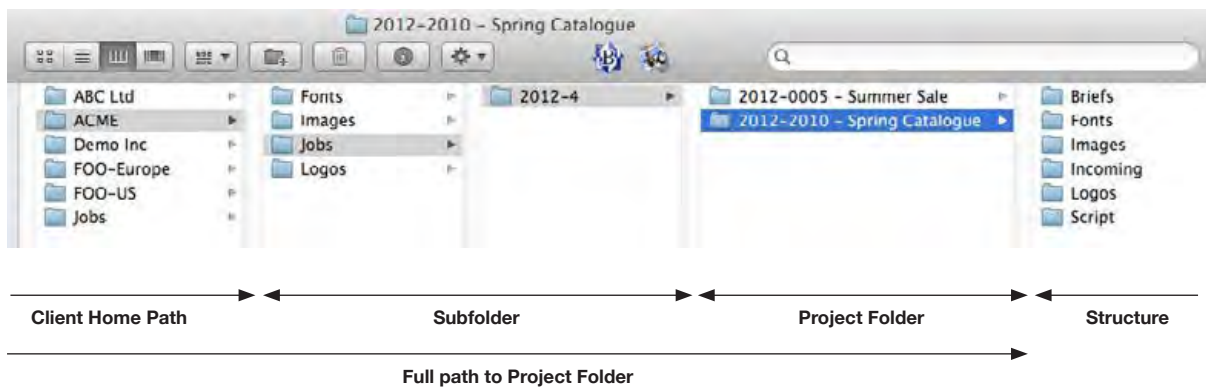
“2012-2010” + “ - ” + “Spring Catalogue”

Combining default location and default name, the full default path of the main project folder is

Client Home folder + Subfolder + Project ID + “ - ” + Project name

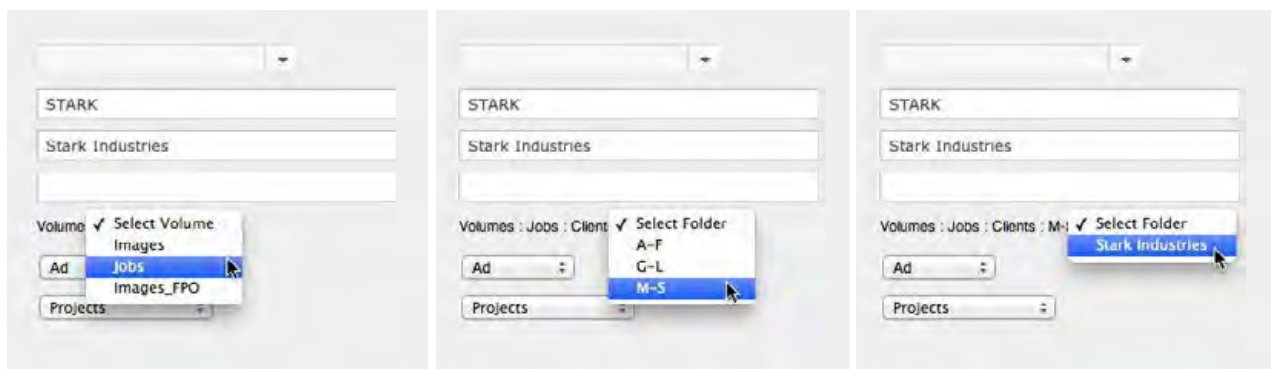
/raid/clients/A-E/ACME/Jobs/2012-4/2012-2010 - Spring Catalogue

The Project Maker resolves the path above using the homopath and subfolder of the selected client and the name and id of the Project to create.



The homopath of a client can be decided by a dynamic path in the client home path setting. The path is similar to the Project path and built up by static path segments and variables. If there is a setup for client home path, the home folder will be created automatically when a new client is added to the system.

When there is no such setup, a browser is presented to the user that adds the Client to the database. It is added by using the selects to browse the file system:



Browsing to the homofolder

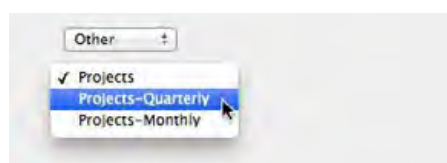
In both cases, it is possible to have a selection of Client structures just like the Project structures. It follows the same rules as the project structure setup: type the path to the folder that contain the structures to choose from. Projectmaker will produce a select if more than one structure is available.

If there is a need to have one or more subfolders in between the Client homefolder and new Projects that are created, this can be done using a Subfolder setting.

The subfolder can be empty, a static path segment or contain a dynamic segment using a date function. The purpose of the dynamic Subfolder is the ability to automatically generate folders per month, per year or per quarter. A subfolder or subfolder selection is defined in the configuration of the Project Maker plugin and if a selection, selected by the user in the plugin:

Argument	Title	Help	Default value	Input filter	User entry
Subfolder selections			Projects Projects-Quarterly;Projects/%Y-%q Projects-M		

Configuring Subfolder as a selection



Selecting the subfolder layout for the client

The Subfolder can be a static text or a text that includes tokens for the date function (see date function tokens in Appendix B). An additional date token introduced in Project Maker is the %Q token which will translate to the current quarter.

Setting up a select for the Subfolder is done in the same manner as other selects created for InterAct arguments: typing in a list of options separated by | (pipe). If the title is different from the value, type in title and value separated by ; (semicolon)

Example Select:

Projects|Projects-Quarterly;Projects/%Y-%q|Projects-Monthly;Projects/%Y-%m

Example Subfolders (created in December 2012):

Projects	<i>translates to</i>	Projects
Projects/%Y-%Q	<i>translates to</i>	Projects/2012-4
Projects/%Y-%m	<i>translates to</i>	Projects/2012-12

When adding the client a selection of the available Project structures is displayed. At this point it is possible to select the default Project Structure for the Client. The default will be preselected when creating a new project for a client.

4.5.1.3 Custom Project Paths and folder names

The configuration for Custom Folder or Path is used when the default Project names or Paths are not sufficient for the desired workflow.

The configuration serves dual purposes: when the setting gives a result that start with a “/” character the Project Maker will assume that the setting generate a Full Project Path. If the result of the setting is a string that does not start with a “/” character it is assumed that the result is the Project Folder name and it will be used in conjunction with the Client homedir and Subfolder to create the Full path.

The Custom Project path 2 setup is used when a workflow calls for a second Project Folder being created. The second folder has no default location and the configuration needs to be for a full path.

The data collected by the Project Maker can be used within the path using a format that specifies the path or foldername with strings and tokens concatenated with **&** characters.

Values from the Project Maker can be inserted using the names below and any values entered from an additional Form Wizard form can be used using the placeholder **order.FIELDNAME** where FIELDNAME is the name defined in the form wizard.

Example Project Folder configuration, to be used with homedir and subfolder:

CLIENTCODE&_&PROJID

Client Code will be combined with the Project ID using an underscore

ACME_2012-12345

Example Full Project Path configuration:

/raid/Clients/&CLIENTCODE&/Projects/&PROJID&_&PROJNAME

Client Code will be added onto a static path, then appended with a static foldername,

followed by The Project ID and Name combined using an underscore

/raid/Clients/ACME/Projects/2012-12345_Summer sale

In addition to the tokens, it is possible to use functions when resolving the paths and folder names. Functions that can be used are: LOOKUP(), DATE(), REPLACE() and ABR().

TOKEN / FUNCTION	DESCRIPTION
CLIENT, CLIENTNAME	The client name from the Client database <i>project.clientname</i> in notifications, etc.
CLIENTCODE	The client code from the Client database. <i>project.clientcode</i> in notifications, etc.
CLIENTHOME	The client home path from the Client database <i>project.clienthome</i> in notifications, etc.
CLIENTSUBF	The subfolder setup made on the Client
CLIENTPROJSTRUCT	The chosen client project structure
PROJID	Project ID <i>project.id</i> in notifications, etc.
PROJNAME	Project Name <i>project.name</i> in notifications, etc.
PROJDESC	Project Description <i>project.description</i> in notifications, etc.
PROJPATH	The final main project path. Can only be used to generate the second path. <i>project.path</i> and <i>project.path2</i> in notifications, etc.
PROJFOLDER	The final main project folder. Can only be used to generate the second path. <i>project.folder</i> and <i>project.folder2</i> in notifications, etc.
order.FIELDNAME	Insert Fieldvalue from Form Wizard where Element Name is FIELDNAME
date(FORMAT)	Current time expressed in specified FORMAT. InterAct uses the standard date formatters in UNIX (see appendix B). If not specified, InterAct will use. %Y-%m-%d which translates to the YYYY-MM-DD format.

TOKEN / FUNCTION	DESCRIPTION
abr(VALUE;METHOD;ARG)	<p>Abbreviate a value using certain method</p> <p>VALUE=data to abbreviate, for example CLIENTNAME, PROJID METHOD=lvl,num,AB,Ab,ab,to,fr ARG=number or digits or characters or token</p> <p>lvl - rounds down to number of digits in ARG abr(12999;lvl;2) Results in 12000 num - rounds to number of digits in ARG abr(12999;num;2) Results in 13000 AB - uses number of chars in ARG, uppercase abr(CLIENTCODE;AB;1) With CLIENTCODE=ACME, Results in A ab - same as AB but change to lowercase Ab - same as ab but without case change to - uses string up to ARG: abr(ABC-123;to;-) Results in ABC fr - uses string from ARG: abr(ABC-123;fr;-) Results in 123</p>
lookup(VALUE;FILE;COL)	<p>Lookup a value from a tab delimited file</p> <p>VALUE=data to use when looking up value, for example CLIENTCODE FILE=file to use for the lookup COL=column to read</p> <p>Example: file /raid/clientlookup.txt contains codes and paths like</p> <pre>ACME /raid1/clients/A/ACME FOO /raid2/internal/mainoffice ...</pre> <p>Using lookup(/raid/clientlookup.txt;CLIENTCODE;2) will map a Clientcode to an arbitrary path</p>
replace(VALUE;FIND;REP)	<p>Replace a substring within a larger string</p> <p>VALUE=string to search and replace in, for example PROJPATH FIND=section to change (can only be static) REP=replacement text, i.e. what to change to (can only be static)</p> <p>Example using replace to build second project path from first: replace(PROJPATH;raid1/clients;raid2/output)</p>

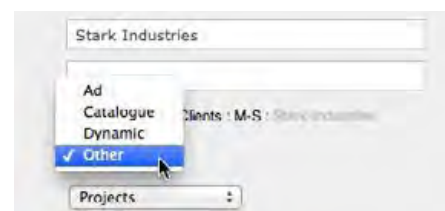
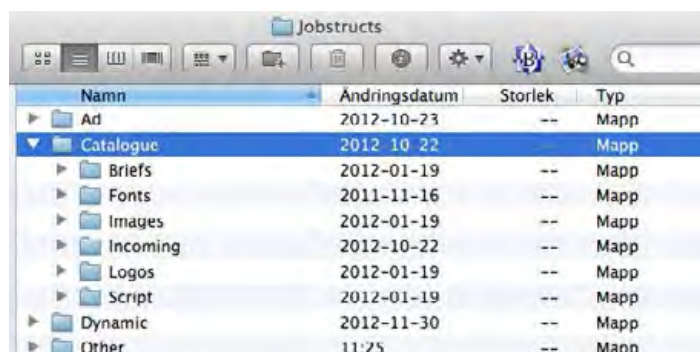
4.5.1.4 Structures and Dynamic folder names

New Projects are created by copying a template structure. The selected structure is copied inheriting permissions from the original structure. The structure can include both subfolders and files that will be copied to the new project. The name of the template structure's top will be changed to the new Project Folder name as given by the plugin configuration.

The setup in the plugin administration should point to the parent folder to the structures to be used. InterAct Project Maker will read the folders inside the given path and display them as options to be selected. If there is only one template structure, it will be automatically selected and used.



Project structure path setup pointing to parent folder of structures



The Ad, Catalogue, Dynamic and Other folders inside Jobstructs are selectable from Project Maker

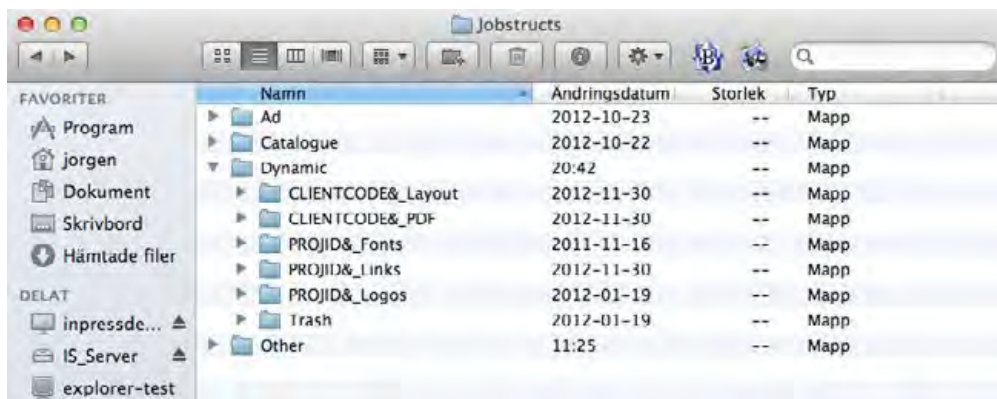
It is possible to select multiple project structures using checkboxes instead of a select. This setup is triggered by adding the text “;multi” after the path:



Setting up and selecting multiple structures

Note that since ProjectMaker will not create structures/folders if the folder exist, this configuration has to use a setup that produce different paths depending on structure in order to actually make more than one project folder.

Normally, the ProjectMaker will copy the template folder structure as it is. However, the plugin will look at all the folder names within the structure and interpret them with the same technique as the custom path generation. By naming the subfolders correctly it is possible to use the information from the plugin to rename the internal folders.



Dynamic folder names in the template structure



Running the plugin



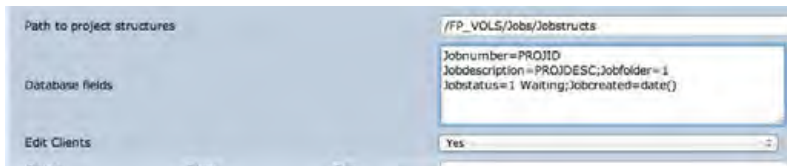
The resulting Project on the filesystem

4.5.1.5 Setting Keywords

When the project folder has been created, the plugin will attempt to set keywords on the folder. The keywords to set are listed in the plugin configuration. The listing should be KEYWORDNAME=VALUE and several keywords can be listed on several lines or on the same line separated by ; (semicolon).

The VALUE part can be static, dynamic or a combination thereof. Dynamic values are the same as when creating dynamic project paths or folder names. See the list in prior section. Note that functions cannot be used.

Example: Following setup is made in the keywords section:



Keyword setup

Running the plugin with Project ID=2012-2010 and Project description=Spring Catalogue generates the following keyword content on the folder:

Resulting keywords on Project folder

Jobfolder and *Jobstatus* keywords are set to static values while the *Jobcreated* field is set using the `date()` function.

4.5.1.6 Project Maker Setup details

The Project Maker configuration follow the same setup as all other plugins with the tabs for Base & Action, Display & Workflow and Notification & Reports enabled.

Below is a list of the main action setups.

SETUP	NOTE	DESCRIPTION
Subfolder selections	Admin only option	<p>Subfolder to use between Client homedir and a new Project. Can be a static pathsegment or a definition of a select. Date tokens for UNIX date command can be used as a part of the path segment. A special date formater, %Q will insert the current quarter.</p> <p>Date formatter example: Projects/%Y-%Q will resolve to 2012-4 (YYYY-Q) Select example: Projects Projects-Quarterly;Projects/%Y-%q Projects-Monthly;Projects/%Y-%m</p>
Path to project structures	Admin only option	<p>Path to the parent folder hosting the Project template structures.</p> <p>The structures needs to be on a Venture enabled volume</p>
Database fields	Admin only option	Keywordname=Value pairs for setting keyword values on the Project folder that is created.
Edit Clients	Admin only option	<p>Enable the ability to create and edit Client records in the client database and create Client home folders.</p> <p>The option View project history allows the user to list the projects for a client with some of the data attached.</p>
Client		<p>Client to create the Project for.</p> <p>A client will be pre-selected if a typed in value matches a client code of an existing client. Combined with user entry disabled will make the client "hard-wired". CLIENTCODE is the token for the client code. CLIENTNAME is the token for the client name.</p>
Project ID		<p>Id of project. Needs to be unique. PROJID is the token to be used for custom paths and keywords.</p> <p>Using the palette to the right, it is possible to instruct ProjectMaker to suggest the next project id. This can be for all clients or per client.</p> <p>When the client is selected, ProjectMaker will look at the client database and find the last project. Then calculate the next number and insert as default.</p>
Project ID control	Admin only option	<p>Decide whether to allow for duplicate project ids.</p> <p>If set to Do not allow, Project maker will prevent making more than one Project wht the same id.</p>
Project Name		Project name. PROJNAME is the token to be used for custom paths and keywords.
Project Description		Description. PROJDESC is the token to be used for custom paths and keywords.
Custom Folder or Path	Admin only option	<p>Custom Project folder name or path.</p> <p>Formula with strings, tokens and functions concatenated with "&"</p> <p>When formula generates a string that starts with / , the result will be interpreted as the full project path. When formula generates a string that does not start with / , the result will be interpreted as the project folder.</p>
Custom Project path 2	Admin only option	<p>Custom Project path for second Project Folder.</p> <p>Formula with strings, tokens and functions concatenated with "&".</p>
Path to job structure 2	Admin only option	Full path to jobstructure used for second Project Folder.
Database fields 2	Admin only option	Setting keywords for second Project Folder
Path to client structures	Admin only option	<p>Path to the parent folder hosting the Client template structures.</p> <p>When set, the Projectmaker will show a selection of structures when adding clients and use the client structure to create the new Client home folder.</p>

SETUP	NOTE	DESCRIPTION
Client home path	Admin only option	Path to the client home. Formula with strings, tokens and functions concatenated with "&" When given, the client home folder will be added automatically as opposed to selected by the user using the browse tool.
Job ticket file	Admin only option	Name of a jobticket file residing in the project structure. This file will be updated with the information from the project that was just created using the same technology as the reports and emails in interact. The name can be dynamic like project folders etc.
RECURSIVEDB	Post via Form Wizard	Apply keywords recursively to all folders in the project folder. A field named RECURSIVEDB needs to be added via a Form Wizard form. The value should be set to 1.
URL1 / URL1NAME	Post via Form Wizard	Create an extra "goto" button in the resulting window using a custom URL1 with the text given in URL1NAME. The url given in URL1 may contain placeholders for the created Projectpath and the Project id. Example: /webnative/upload?#PROJPATH# #PROJPATH# will be replaced with the URL to the New Project folder #PROJID# will be replaced with the Project ID
URL2 / URL2NAME	Post via Form Wizard	Second custom "goto" button. Operates like URL1 and URL1NAME
AFPLINK	Post via Form Wizard	The server to be accessed locally, example: 192.168.99.111 If given, ProjectMaker will create afp links of the type afp://HOST/PATH to the folders that has been created and include those links in the email. Note that ProjectMaker will add the "afp://" part
CUSTOMSCRIPT	Post via Form Wizard	The name of a custom script/program that should be executed after the Project has been created. The executable to reside in /usr/tracker/bin/custom. It will be called using the following arguments: 1) Path to the original InterAct orderfile which contain all the order data 2) Path to the InterAct content file used for reporting and emails, etc. 3) The custom script argument below ProjectMaker will handle removal of the files passed in as arguments.
CUSTOMSCRIPTARG	Post via Form Wizard	The third (optional) argument to the custom script defined in CUSTOMSCRIPT

4.5.1.7 Notifications & Jobticket file

The ProjectMaker will send an email note regarding the created Project. The email will be sent to both the Admin email and the Receipt email addresses if they are set in the plugin configuration.

The ProjectMaker email template is used to generate the email content. See the section 5.2 on email content for more information on how to customize the mail content. Projectmaker specific data is listed in the table in section 4.5.1.3.

ProjectMaker can also create a "jobticket" file inside the created Project structure(s). This file needs to be setup like an InterAct report/notification template and reside in the project

structure(s). The name of the file is then entered into the admin gui to be recognized. The name can be static or include data from the project just like the project folders and paths.

Example: The jobticket should be on the top level of the folder that is being created. It should be named: PROJECTID_job.xml.

The content of the file should be:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<project id="2014-03-123456">
  <projectinfo>
    <creator value="john.doe">
    <clientcode value="ACME">
    <projectname value="New spring catalogue">
  </projectinfo>
</project>
```

Step 1: Create a file with the above layout, using the tags and information to make notifications and reports in InterAct and the specific placeholders for ProjectMaker data. Save it to the structure folders. Note that this makes it possible to have different jobticket layouts for different structures. Name the file according to the naming convention used for project folders and paths.



Structure with a jobticket file formatted for xml

Step 2: Enter the name in the admin gui.

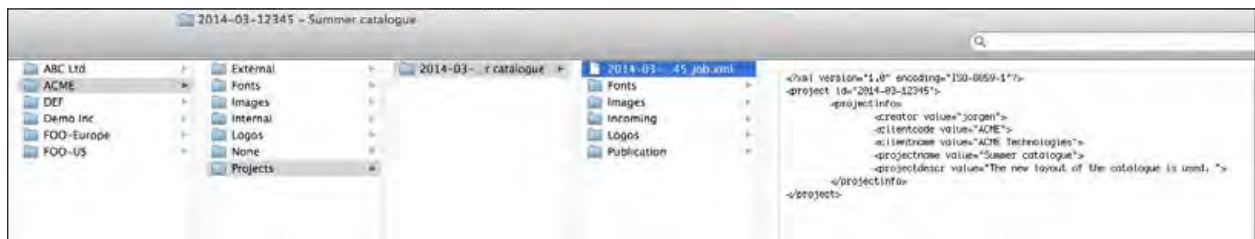


Insert the literal name of the jobticket file in the admin gui

Results in:

A screenshot of a web application titled 'InterAct Project Maker'. It contains a form with the following fields: 'Client*' with a dropdown menu showing 'ACME - ACME Technologies' and buttons 'Edit', 'Add', 'Delete', and 'Projects'; 'Project structure' with a dropdown menu showing 'Ad'; 'Project ID*' with a text input field containing '2014-03-12345'; 'Project Name' with a text input field containing 'Summer catalogue'; and 'Project Description' with a text area containing 'The new layout of the catalogue is used.'. At the bottom of the form are two buttons: 'Cancel' and 'Create Project'.

Making the project



Structure on disk including the jobticket file

Note that the jobticket file can be used in addition to the normal report functionality.

4.5.1.8 ProjectMaker Additional options

In some workflows it may be valuable to be able to change more of the setups based on the selected template structure. For that reason, there is an advanced option to create a template based override of some of the plugin setups.

Place a textfile named **projsetup** inside the template structure. The file should be formatted as *ISO latin 1 with Unix line breaks*. Make sure the file has permissions to be read properly.

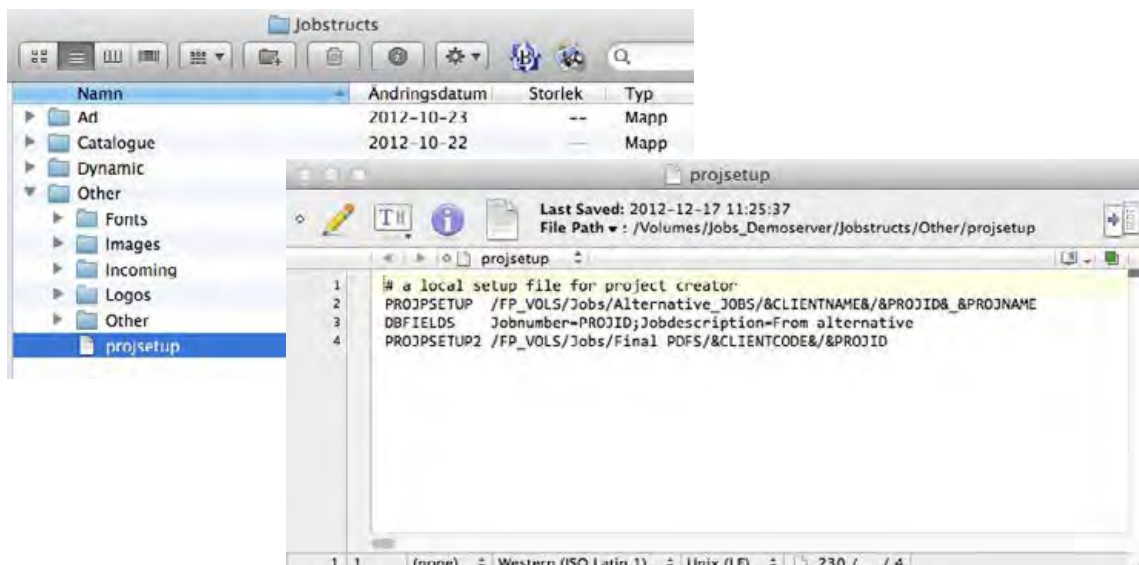
The file may include overrides for some of the setups made in the configuration. The overrides are listed in the file using a tabdelimited format with the needed options listed one per line, for example:

```
PROJSETUP          /raid1/other_folder/&CLIENTCODE&/&PROJID
```

The following options can be set in the file:

CONFIG	USED FOR
PROJSETUP	Custom path setup on where to create the project
DBFIELDS	Setup for what to write to keywords
PROJSETUP_n (n=2,3,4,..)	Custom path setup on where to create additional project folders
SELPROJSTRUCT_n	Selected project structure for additional project folder n, where n is 2,3,..
DBFIELDS_n	Setup for what to write to keywords on the additional project folder n, where n is 2,3,..

This technique can be used for example to route the Project Folder to a non-standard location, to generate a second, third, etc Project Folder and so on for certain types of projects.



4.5.1.9 Project Maker GOTO buttons

The Project Maker automatically creates a button in the resulting window that takes the user to the Project Folder that was created. If the project generated more than one folder it will list all the folders with buttons.



Project folder with access button

It is possible to create two additional custom buttons with custom texts and URLs. These buttons are created by adding settings via a Form Wizard form.

The Text on the button is passed in the URL1NAME (and URL2NAME) field and the actual url in the URL1 (and URL2) field.

The URL1 and 2 fields may contain placeholders for the dynamic Full Path and Project Id of the Project. The place holders are referenced using following tags:

#PROJPATH#	will be substituted for the URL of the first project path
#PROJID#	will be substituted for the project id

Example:

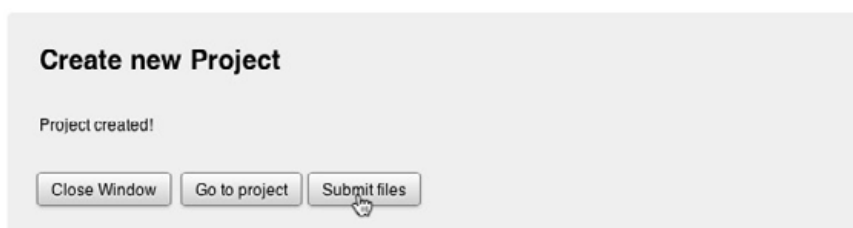
URL1NAME = "Submit files"

URL1 = "/PORTAL/UPLOAD.php?path=#PROJPATH#/Incoming"

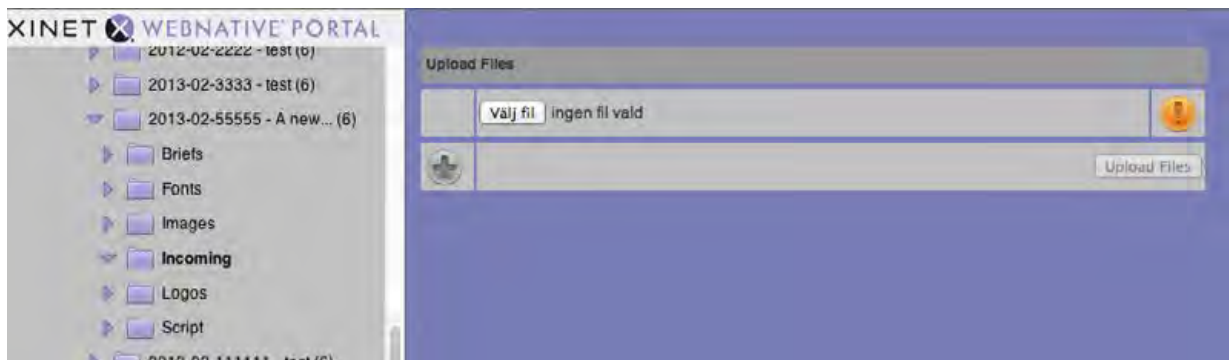
Will generate a second button with the title "Upload files". It will take the user to the Upload section inside a subfolder "Incoming" in the newly created Project.



The Form Wizard setup to generate a second button



Confirm dialogue after creating the Project showing standard "Goto" button and custom "Submit files" button



Using the Custom “Submit files” button takes the user to Upload in the subfolder “Incoming” of the new Project.

4.5.1.10 Project Maker client database

The Project Maker maintains a database that contain all the Clients and projects that has been created. The client list is displayed in the interface and used when building Projects. The project list can be displayed as well per client.

When adding a new project, all clients in the database are shown by default. It is possible to limit the client list for specific users or groups by creating filter files to define what clients to allow or reject for certain users/groups. The lists should be saved into **/usr/tracker/setup** and named **clients.allow** and **clients.reject**. There are two sample files included in the installation with some further instructions.

The lists will be read and compared to the user and group when loading the plugin. Any client listed matching the user or group in the allow file will be displayed and any listed in the reject file will be removed from the list.

Several clients can be listed using comma-separation and it is also possible to use a wildcard * in the list. It is possible to use both an allow and reject list and the result will be weighed together with allow being applied before reject. See the sample files for more information.

4.5.2 InterAct Move Files

InterAct Movefiles either moves or copies the selected files to a new location. The move/copy is performed while keeping any assigned Venture metadata.

The method (move/copy) as well as what to do with any duplicates encountered when moving to the output path is decided by arguments to the action. New path and an optional new folder to put the files in are also decided by arguments.

The path where the files are copied to is either selected by the user or interpreted by InterAct based on the Path setup. If the user handles the path, selection is made by browsing the WebNative environment using a folder browser.

When InterAct interprets the path, it is possible to use different methods to figure out the target path using database fields, lookup tables and more. See following example 4.5.2.1 for more information.

When folders are in the basket handled by InterAct Move Files, it is possible to make InterAct treat each subfile recursively in the folder separately.

SETUP	NOTES	DESCRIPTION
Method	Required Can be passed to user	Select to move or copy files

SETUP	NOTES	DESCRIPTION
Duplicates	Required Can be passed to user	Method to handle identical file names when making a move/copy. Overwrite - replace any duplicate files with the new file Keep old as backup - Keeps old files and names new files -1, -2 ...
Path	Required Can be passed to user	Path where to move/copy files. Path can be: Selected by browse. See use browse below Specified as a path with or without variable segments
New Folder	Can be passed to user	Give user possibility to create new folder when copying/moving files. Leave empty to not create new folder.
Use browse	Required	Set to Yes to let user browse volumes to find the destination folder. Yes, also able to create folders will allow the user to make new folders while browsing.
Clear Keywords	Required	Set this to yes to have any keywords reset to empty after moving/copying the file.
Error Path		Path where to move/copy files if there are errors interpreting main path. Specified as a path with or without variable segments.
Apply on files in folders	Required Can be passed to user	Apply the move/copy independently for files recursively within any folders in the basket.
Remove empty folders	Required Can be passed to user	Clean out any folders that are left empty in when move has been performed.

» Modify "John.doe" - "InterAct Move Files"

» **Base & Action** Files, Conversion & Access Display & Workflow Notification & Reports Database

Language eng

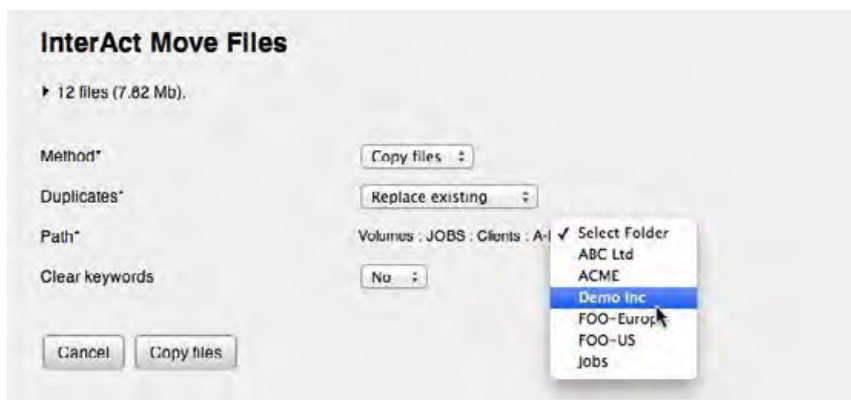
Argument	Title	Help	Default value	Input filter	User entry
Method*	Method	Edit	Copy files		Yes*
Duplicates*	Duplicates	Edit	Replace existing		Yes*
Path*	Path	Edit			Yes*
New Folder	New Folder	Edit			
Use browse*			Yes		
Clear keywords	Clear keywords	Edit	No		Yes
Error Path					
Apply on files in folders*	Apply on files in folders	Edit	No		
Remove empty folders*	Remove empty folders	Edit	No		

This action will move or copy the files in the basket to a new location. An email can be sent to the admin listing files that are copied/moved.

Several options are available for how files are handled: reset keywords, overwrite or keep, create a new folder, etc.

The copy/move can happen to a static location, browse location or a dynamic location.

Configure Movefiles for move/copy using the browser



Browsing to target folder



Copying files

4.5.2.1 Move Files using dynamic path

Instead of using a Move/Copy path given by the user, one can be defined by the administrator setting up the plugin. A path configuration can either be a static path or a dynamic path built up by different components “glued” together with the “&” character.

The components are static strings, variables from the order and several functions.

Strings are usually path segments like “/raid/Customers” or “/incoming files/”

Variables are **tokens from the order** taken from the same array as is used by the notifications and reports (see 5.4), for example: “file.name” or “order.Some_Value_From_Form”

Functions that can be used are: **Date, First, DB, Lookup, Mlookup** (see more details below)

Example paths:

Static: /FP_VOLS/Jobs/Incoming

Dynamic, with current date in the path: /FP_VOLS/Jobs/Incoming/&date()

Dynamic, with database value in the path: /FP_VOLS/Jobs/Incoming/&db(Image Category)

See examples using the paths below:

Action argument	User Defined ¹	Custom Title ²	Default value ³
Method*	L <input checked="" type="checkbox"/>	<input type="text"/>	Copy files
Duplicates*	L <input checked="" type="checkbox"/>	<input type="text"/>	Overwrite
Path*	L <input type="checkbox"/>	<input type="text"/>	/FP_VOLS/Jobs/Incoming

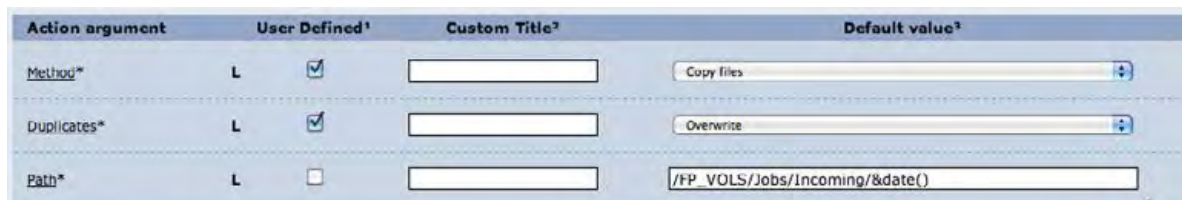
Configuring Movefiles with a static path



The movefiles interface has no browser



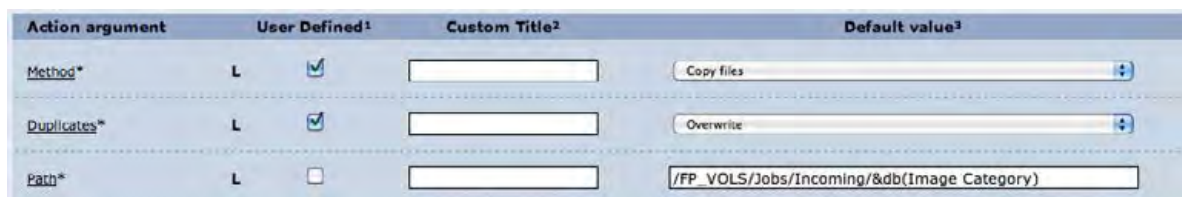
The resulting desktop, with files inside "Incoming"



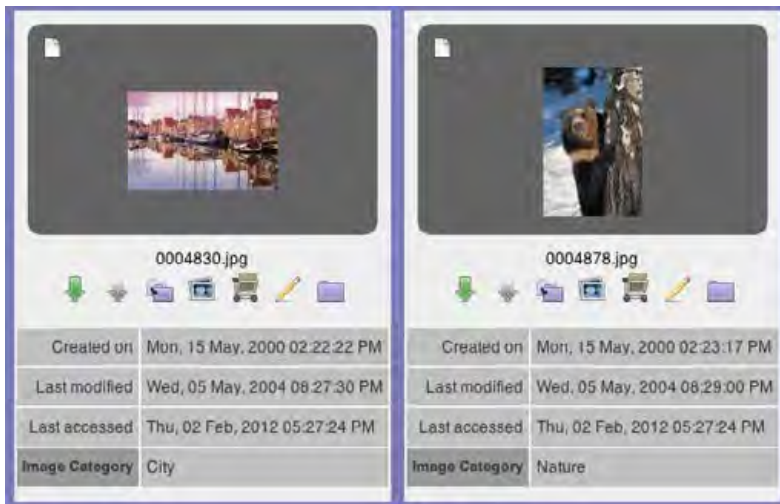
Configuring Movefiles with a dynamic path using the current date



The resulting desktop, with files inside "Incoming" with subfolder with current date



Configuring Movefiles with a dynamic path using database values for the field "Image Category" associated with the assets



Database values set for the files in the basket, on keyword "Image Category"



The resulting desktop, with files inside "Incoming" with subfolder named as the value of the field "Image Category"

For more complex moves it is possible to use following functions in the path argument. The table below also lists some of the more common tokens from the array that can be used when building the paths. See more about the order tokens in section 5.4

FUNCTION	DESCRIPTION
Date(FORMAT)	Insert current date using date formatter FORMAT. FORMAT is a standard Unix/C date format string. See Appendix B. Default is %Y-%m-%d (YYYY-MM-DD)
First(STRING,L U K)	Get first character in string and format using L - Lower case U - Upper case K - Keep as is STRING - string, variable or function Example: First(DB(Category),U)
DB(FIELDNAME)	Get value in field FIELDNAME from Venture database on current file Example: DB(Category)
Lookup(FILE,STRING,COL)	Lookup a string from a tabdelimited flatfile FILE, using STRING as a lookup and reading column COL. STRING has to match the key which is the first column in the file. FILE - full path to file STRING - token to lookup. May be static text, variable or function COL - column to read Example: lookup(/raid/lookups/destination,db(Category),3) Lookupfile can have a default value, using "default" as the key in first column. <i>The returned string will be parsed, which means that it in turn can include functions and variables.</i>

FUNCTION	DESCRIPTION
Mlookup(FILE,STRING1,STRING2,COL)	<p>Lookup a string from a tab delimited flatfile FILE, using STRING1 and STRING2 as lookups and reading column COL. STRING1 has to match the key which is the first column in the file and STRING2 has to match the second key which is the second column.</p> <p>FILE - full path to file STRING - token to lookup. May be static text, variable or function COL - column to read</p> <p>Example: lookup(/raid/lookups/destination,db(Category),3) Lookupfile can have two level of default values, using "default" as the key in first and second columns.</p> <p><i>The returned string will be parsed, which means that it in turn can include functions and variables.</i></p>
file.name, file.ext	file related data. Name and extension
user.name, user.group	user related data. Username and primary group of user
order.FIELDNAME	order related data. Value from Form Wizard field with name FIELDNAME

4.5.3 InterAct Delete Files

Delete files is a batch delete of the files in the basket.

There are no specific Arguments on the action.

4.6 Other plugins

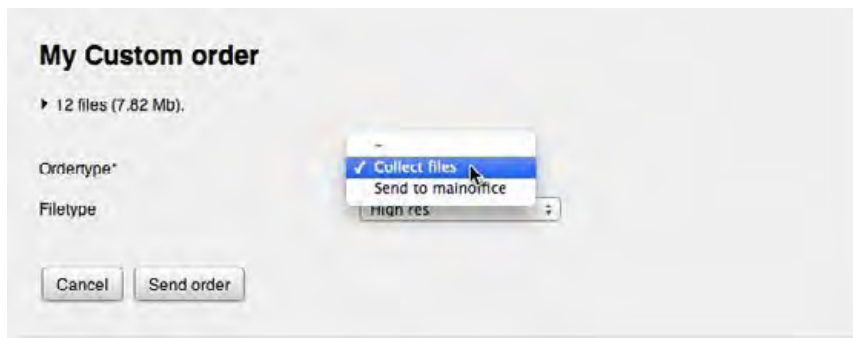
4.6.1 InterAct Custom Order

The Custom Order plugin needs a single action or an actionlist. This decision is made on the base config tab.

When a single action is selected, it will act exactly as the corresponding standalone plugin (described in following subsections) provided that there is a plugin for that action. Some actions are only available for selection for the custom order plugin and not as standalone plugins.

When an actionlist is selected, the interface will show the list as a select. This makes it possible to have the user select one action out of several when running the plugin. Note that the actions in the selection are predefined by the list.

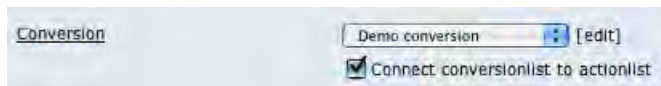
Configuring Custom Order with actionlist



Running Custom Order with actionlist

When applying both an actionlist and a conversionlist on the Custom Order plugin, it is possible to bundle them into a single select. This behaviour is enabled by checking the **Connect conversionlist to actionlist** checkbox on the **Conversions** tab.

When connection is enabled, only the Actionlist is shown. The index in the select of whatever action is selected will also be used to select the conversion. For example, selecting option 2 in the Actionlist will silently select option 2 in the conversionlist.



Enable Connect.

The selection in the Action popup will decide the selection in the conversionlist. The conversionlist **will not be visible** to the user.



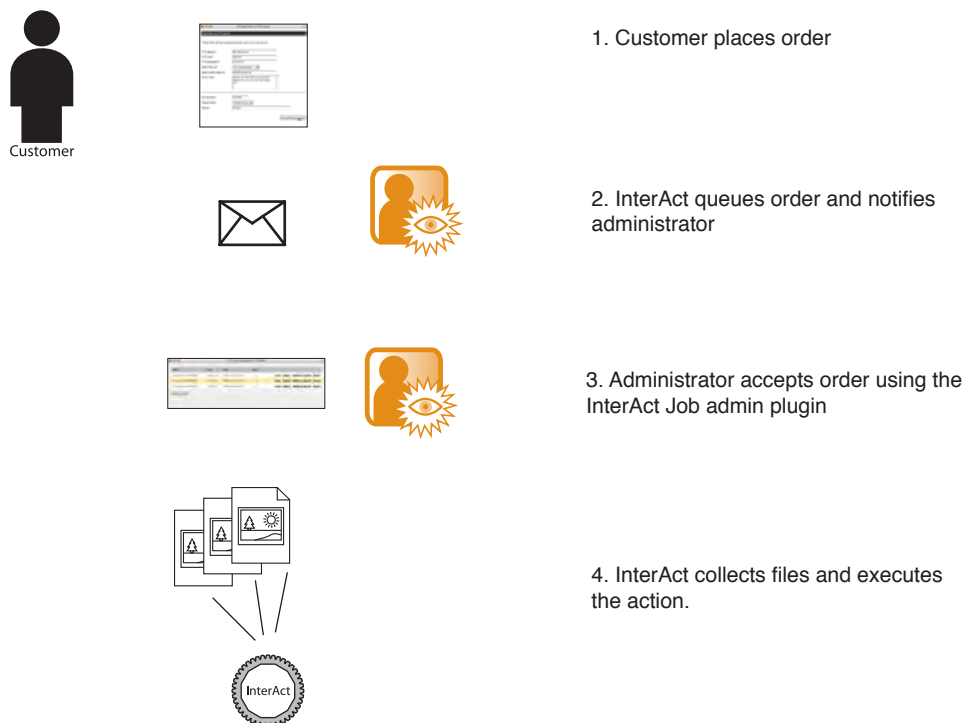
Making an actionlist selection will silently select conversion. Conversionlist is not shown.

Note: If there are more entries in the actionlist than in the conversionlist, the last entry in the conversionlist will be applied to the selections in the actionlist with numbers higher than the number of entries in the conversionlist. If there are more entries in the conversionlist, all entries with numbers higher than the last entry in the actionlist will be ignored.

4.7 InterAct Jobadmin

When placing an order it can either be processed automatically or be placed in an order queue for manual authorization and start.

The approval step is available for several of the InterAct Plugins, like “Custom Order”, “Asset Link”, “Send FTP” and “Collect”.



Authorization workflow

4.7.1 Enabling Authorization workflow

There are two ways to initiate authorization workflows. The most straight-forward way is to check the **Manually authorize order** checkbox above the Action setup in the first setup tab: Base.



Turning on manual approval will change behaviour. Order is put into queue, awaiting approval

This will cause the orders placed for this plugin to be put in a queue instead of being processed immediately.

The second way is to use the file filtering function. A file filter can use different criteria like values on keywords, filepaths, filename, etc. to change the status for a file from being allowed to process to instead require an authorization. A file filter can also change the status of a file to not be allowed in the basket at all. See section 6.5 for more information on file filters.

In addition to the checkbox, it is also possible to configure an email address where a notification of the pending order is sent to. To send such an E-mail, enter the desired email address in the

Administrator mail input field and check the **Notify on order** checkbox, both located on the *Notifications & Reports* tab.

The screenshot shows the 'Modify "john.doe" - "InterAct Collect"' window with the 'Notification & Reports' tab selected. The 'Administrator mail' field contains 'demoadmin@inpress.se' and the 'Notify on Order' checkbox is checked. Below it, the 'Receipt mail' field is empty, 'Make receipt mail dynamic' is checked, and 'Receipt on Order' is checked. The 'Notification templates' dropdown is set to a default value. The 'Reply-to mail' field contains 'info@inpress.se'.

Administration Email on order

4.7.2 Setting up Jobadmin

The Jobadmin configuration is performed using the InterAct administration tool just like the other plugins. However, it does not follow the same steps and only has one page. Here it is possible to configure what orders the user is allowed to see, what the control level is and what should be viewed when listing the orders.

SETUP	DESCRIPTION
Language	Language to use in the plugin
Orderform main title	Title used for the plugin in links and in interface
View and administrate orders	Select what orders that show up in the Jobadmin interface based on user that originally placed the order: <ul style="list-style-type: none"> - All orders in queue - Orders placed by Jobadmin plugin user - Orders placed by members with same primary group
No administration on order	Disable ability to administer orders, only view orders
Administer individual files on order	Enable ability to remove specific files on orders
Advanced selection of orders	List certain users, groups, admin or recipient email addresses to be shown in the queue. The lists can be comma separated and include wildcards, Examples: Users: user1,user2 Recipient e-mail: *@inpress.se,*@acme.com The advanced selections work together with the other limitations above
Show specific columns	Control what information to show and whether the field can be used to filter the list If no selection of columns has been made, a default listing will be shown.
Thumbnail Maximum	The Jobadmin will show assets as thumbnails up to a certain number. When the number of assets exceed this number, the view will instead be using small icons for the assets. Enter your custom breakpoint here. The default is 50.

» Modify "demo" - "InterAct Jobadmin"

Language:

Orderform main title:

View and administrate orders:

Administration options:

- ☐ No administration of orders
- ☒ Administer individual files on order

Advanced selection of orders:

User:

Group:

Admin e-mail:

Recipient e-mail:

Show specific columns:

- ☒ Order
- ☒ User
- ☐ Group
- ☒ Date
- ☐ Admin e-mail
- ☒ Recipient e-mail

Basic configuration of the job admin

Administrate InterAct orders

					Orders	History
Order	User	Date	Recipient e-mail			
donald.duck.1358863027 (5)	donald.duck	2013-01-22 14:57:07	donald.duck@duckburg.net		Reject	Approve
john.doe.1358862460 (12)	john.doe	2013-01-22 14:47:40	john.doe@inpress.se		Reject	Approve
john.doe.1358863155 (8)	john.doe	2013-01-22 14:59:15	john.doe@inpress.se		Reject	Approve
mickey.mouse.1358862923 (1)	mickey.mouse	2013-01-22 14:55:23	mm@ducksburg.net		Reject	Approve

Listing of orders in the jobadmin

Administrate InterAct orders

Administrate InterAct orders

OrdersHistory

Order	User	Date	Recipient e-mail	
donald.duck.1358863027 (5)	donald.duck	2013-01-22 14:57:07	donald.duck@duckburg.net	RejectApprove
john.doe.1358862460 (12)	john.doe	2013-01-22 14:47:40	john.doe@inpress.se	RejectApprove
john.doe.1358863155 (8)	john.doe	2013-01-22 14:59:15	john.doe@inpress.se	RejectApprove

Order
User
Order date
Jobinfo
Number of files

john.doe.1358863155
john.doe
Tue Jan 22 2013, 14:59:15
Collect folder to /FPVOL5/OUT/InterAct
6

Metadata attached to this order

PROJECTID
REF
ADDRESS
USAGE

2013-123471
J Doe
ACME / Euro Office Brussels
Catalogue


0006613.jpg


0006634.jpg


FERNS.JPG


FFC_089.JPG


GUMB_01.JPG


HARVEST.JPG

Close

mickey.mouse.1358862923 (1)	mickey.mouse	2013-01-22 14:55:23	mm@ducksburg.net	RejectApprove
-----------------------------	--------------	---------------------	------------------	---------------

Listing of orders with one order expanded to see the details

4.7.3 Accessing InterAct Jobadmin

The InterAct Jobadmin is enabled like any other InterAct plugin and is found in the basket of a user using standard WebNative Styles or via WebNative Portal.

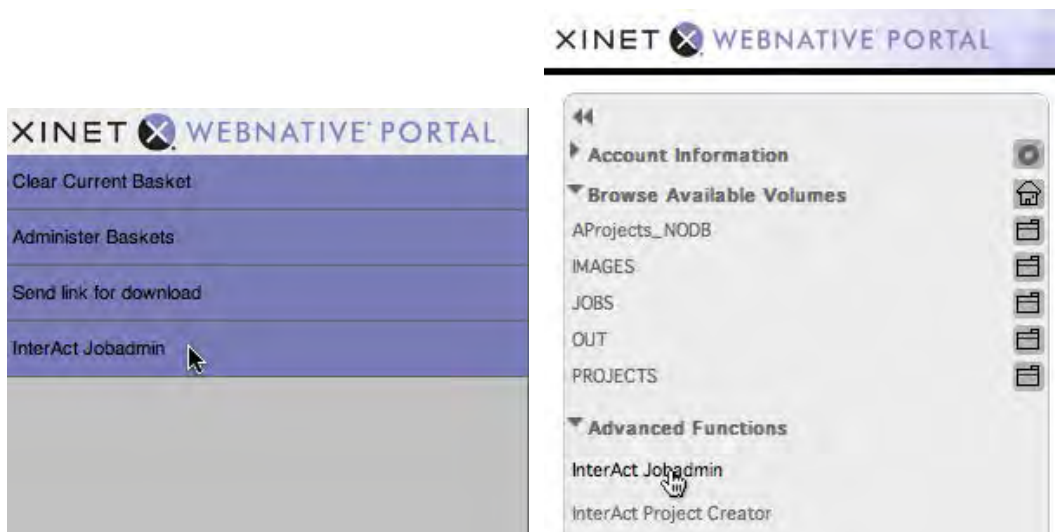
When using the InPressive styles the Jobadmin is found just below the volume browse section in the Navigation frame. In the house_inpress styles it can be found in the toplevel and when using WebNative Portal 3, it appears in the navigation section on the left hand.



Available Volumes for johan



Link to InterAct Jobadmin from house_inpress and InPressive WebNative styles



Link to InterAct Jobadmin from Portal 4 and Portal 3 environments

4.7.4 Using InterAct Jobadmin

The InterAct Jobadmin is used to access, approve or reject the orders pending. Orders can be approved, partly approved or rejected.

What is shown in the list in the Jobadmin depends on the setup of the plugin. It is possible to limit what orders to view in different ways from the administration utility.

In the interface, the user with Jobadmin access, can sort the listing in different ways and can also filter the listing by entering a phrase to limit to. Only the orders with that phrase in any of its fields in the listing will be shown.

To show more information about an order, unfold it using the icon to the left.

Administrate InterAct orders

Sort by Date (descending)

Orders History

Order	User	Date	Recipient e-mail	
donald.duck.1358863027 (5)	donald.duck	2013-01-22 14:57:07	donald.duck@duckburg.net	Reject Approve
john.doe.1358863155 (6)	john.doe	2013-01-22 14:59:15	john.doe@inpress.se	Reject Approve
john.doe.1358862460 (12)	john.doe	2013-01-22 14:47:40	john.doe@inpress.se	Reject Approve
mickey.mouse.1358862923 (4)	mickey.mouse	2013-01-22 14:55:23	mm@ducksburg.net	Reject Approve

Sort orders by clicking on label

Administrate InterAct orders

Orders History

Order	User	Date	Recipient e-mail	
john.doe.1358863155 (6)	john.doe	2013-01-22 14:59:15	john.doe@inpress.se	Reject Approve
john.doe.1358862460 (12)	john.doe	2013-01-22 14:47:40	john.doe@inpress.se	Reject Approve

Filter orders by typing text in the field on the top right hand corner

Administrate InterAct orders

Orders History

Order	User	Date	Recipient e-mail	
donald.duck.1358863027 (5)	donald.duck	2013-01-22 14:57:07	donald.duck@duckburg.net	Reject Approve
john.doe.1358862460 (12)	john.doe	2013-01-22 14:47:40	john.doe@inpress.se	Reject Approve
john.doe.1358863155 (6)	john.doe	2013-01-22 14:59:15	john.doe@inpress.se	Reject Approve

Order: john.doe.1358863155
 User: john.doe
 Order date: Tue Jan 22 2013, 14:59:15
 Jobinfo: Collect folder to /FPVOLS/OUT/InterAct
 Number of files: 6

Metadata attached to this order

PROJECTID: 2013-123471
 REF: J.Doe
 ADDRESS: ACME / Euro Office Brussels
 USAGE: Catalogue









Close

mickey.mouse.1358862923 (4)	mickey.mouse	2013-01-22 14:55:23	mm@ducksburg.net	Reject Approve
-----------------------------	--------------	---------------------	------------------	----------------

Access more information about an order by expanding it

When the user has found the orders to be administered, it is possible to use the buttons to the right to **Reject** or **Approve** pending orders. Clicking any of those buttons will open the order for Approval or Rejection.

4.7.4.1 Approving an order via InterAct Jobadmin

Depending on whether the order has a receipt email or not there will be options to send an email when approving.

Also, depending on whether the user has the ability to **Administer individual files on order** set it will be possible to Approve but exclude selected assets from the order. To exclude an asset, click the X button to the top right on the asset. To change an excluded asset back to become included, click the Include button in the middle of the asset.

john.doe.1358863155 [6] john.doe 2013-01-22 14:59:15 john.doe@inpress.se [Reject] [Approve]

Order: john.doe.1358863155
 User: john.doe
 Order date: Tue Jan 22 2013, 14:59:15
 Jobinfo: Collect folder to /FPVOLS/OUT/InterAct
 Number of files: 6

Send mail to: ☐ john.doe@inpress.se
 CC to: demoadmin@inpress.se
 Message:

Metadata attached to this order

PROJECTID: 2013-123471
 REF: J Doe
 ADDRESS: ACME / Euro Office Brussels
 USAGE: Catalogue

0006613.jpg 0006634.jpg FERNIS.JPG
 FFG_089.JPG GUMBIL_01.JPG HARVEST.JPG

[Close] [Approve]

Approving full order

john.doe.1358863155 [6] john.doe 2013-01-22 14:59:15 john.doe@inpress.se [Reject] [Approve]

Order: john.doe.1358863155
 User: john.doe
 Order date: Tue Jan 22 2013, 14:59:15
 Jobinfo: Collect folder to /FPVOLS/OUT/InterAct
 Number of files: 6

Send mail to: ☒ john.doe@inpress.se
 CC to: demoadmin@inpress.se
 Message: Two images cannot be released since we are renegotiating the terms. /Demo

Metadata attached to this order

PROJECTID: 2013-123471
 REF: J Doe
 ADDRESS: ACME / Euro Office Brussels
 USAGE: Catalogue

0006613.jpg 0006634.jpg FERNIS.JPG
 FFG_089.JPG GUMBIL_01.JPG HARVEST.JPG

[Close] [Approve]

Approving order but excluding two of the assets. An email is also sent.

After the order is approved it will be picked up by the queue and processed.

4.7.4.2 Rejecting an order via InterAct Jobadmin

Depending on whether the order has a receipt email or not there will be options to send an email when rejecting.

donald.duck.1358863027 [5] donald.duck 2013-01-22 14:57:07 donald.duck@duckburg.net [Reject] [Approve]

Order: donald.duck.1358863027
 User: donald.duck
 Order date: Tue Jan 22 2013, 14:57:07
 Jobinfo: Collect folder to /FPVOLS/OUT/InterAct
 Number of files: 5

Send mail to: ☒ donald.duck@duckburg.net
 CC to: demoadmin@inpress.se
 Message: Sorry but you cannot have these items. /Demo

Metadata attached to this order

PROJECTID: 2013-123401
 REF: Donald D
 ADDRESS: Head Office
 USAGE: Invitation

[Close] [Reject]

Rejecting order and notifying user by email.

5 NOTIFICATIONS AND REPORTS

InterAct sends a lot of email notifications, both as part of the ordering process (placing orders and notifying administrators) and in many cases as part of the action (share basket, send link...). Notifications share its customization technique with Reporting by using the same engine to produce the output based on templates and tokens.

This chapter will walk through how notifications and reporting templates work and can be customized.

5.1 Notification email structure

InterAct emails are based on mailtemplates. The mailtemplates are files saved into a subfolder (notiftempl) in the InterAct setup directory (/usr/tracker/setup). There is one template for the administrator notification and one for the receipt to the user placing an order: **adm** and **receipt**.

In addition to these there are a number of templates used in the individual actions.

TEMPLATE	USED FOR
adm	Notification to the administrator email address
receipt	Receipt sent back to the user
assetreview_stdmail	Asset review
sendbasket_stdmail	Share basket
mailonly_stdmail	Mail comment
approval_request_stdmail	Approval request
approval_stdmail	Approval
assetlink_stdmail	Asset Link
sendbyftp_stdmail	Send by FTP
projectmaker_stdmail	Project Maker
movefiles_stdmail	Move files
deletefiles_stdmail	Delete files

5.2 Customizing email look and feel

The **notiftempl** folder (/usr/tracker/setup/notiftempl) contains the main mailtemplates along with subfolders for customized templates. From the user/group setup it is possible to select from the subfolders. When sending a specific email, InterAct will check the notification setup of the user/group and if a selection has been made, look for the appropriate template within the folder. If the template is not found in the folder it will revert back to the top folder and use the default template. This strategy makes it possible to create customized emails only for certain emails while still using the defaults for the remainder.

InterAct ships with default emails formatted as html emails. As an alternative, the same emails are shipped as text only in the subfolder textonly (selectable from the admin interface).

To create a new email setup, make a new folder inside **notiftempl**. Copy the template or templates that need customization into the folder. Either copy the html or the plain text originals (from the textonly subfolder). Edit the emails as needed and select the folder from the admin interface.

Please note that the standard emails should not be edited since they may be overwritten when a software upgrade is undertaken.



Don't edit the default templates. They will be overwritten when upgrading the software

Some of the action setups also have the ability to specify a certain mail template for its action-mail. This is in addition to the normal notification template setup. If a value is entered in the action setup for a notification template, that value will be used instead of any default or custom selected notification template setup.

5.3 Email template format

The emails are in plain text and should be edited using a text editor like BBEdit or TextWrangler. Save the files using UNIX linefeeds and encoded as ISO Latin 1. Any empty line in the file will be ignored so if you need a line that shows up as empty, just use a space on that line.

The first line in the email template is used as the Subject line of the email and will be stripped out and not be part of the email body itself.

If the email is of HTML type, it is of upmost importance that the first line after the subject is an <HTML> tag.

```
Thanks for the order
<HTML>
<HEAD>
<STYLE TYPE="text/css">
```

The example above is the top four lines of an html email template. "Thanks for the order" is the subject and the first line is an HTML doc tag.

InterAct parses the email template looking for markers specifying tokens that will be exchanged for the unique data pertaining to the specific order. The marker used in the email templates is "#" (the hash character).

The token is normally embedded inside two markers as in: "#order.name#".

```
<TR><TD class='headline' colspan=2>InterAct Order #order.name#</TD><TR>
```

The section above is taken from the default html template for the admin mail. It has one token: "order.name" embedded within "#" characters.

InterAct builds an array with many different values that come from the current order. The array is structured into different sections like "user" and "order", each with subvalues like "user.name", "user.group" and "order.name". To insert a value from a certain variable, use the token within the markers.

In addition to the simple sections there are also numbered sections and subsections that can have different lengths depending on the data available. Example: "file0", "file1", "file2", and "order.metaname0", "order.metaname1" and "order.metaname2".

Retrieving data from the numbered sections has to be done using loops. There are two types of loops: single-line and multi-line. A single-line loop is created by typing one of the numbered variables at a line using a "@" instead of the number. The entire line will be repeated, string with the number "0" and increasing the counter as long as there is data:

```
<TR><TD class='boldtext'>#order.metaname@#</TD><TD class='text'>#order.metacont@#</TD></TR>
```

With the data

```
order.metaname0 = "PO"
order.metaname1 = "REF"
order.metaname2 = "ADDRESS"
order.metacont0 = "123456"
order.metacont1 = "Bilbo Baggins"
order.metacont2 = "Bag End"
```

The template section will be expanded to:

```
<TR><TD class='boldtext'>PO</TD><TD class='text'>123456</TD></TR>
<TR><TD class='boldtext'>REF</TD><TD class='text'>Bilbo Baggins</TD></TR>
<TR><TD class='boldtext'>ADDRESS</TD><TD class='text'>Bag End</TD></TR>
```

A multi-line loop can be created using specific loop tags. These tags are only used to create the loop and will not be printed. A loop tag has to be aligned to the left of the line and the following syntax is used: **#TOKEN@<#** where TOKEN is the repeated variable token name, for example “file”, followed by the section to loop for each repetition and then closing the section to be repeated by ending it with **#TOKEN@>#**.

Following example from the `textonly mailonly_stdmail` mail template shows the use of a multi-line loop on the **file** variable:

```
Files
#file@<#
File: #file@.name#
Comment: #file@.comm#
#file@>#
```



*A multi-line loop tag
needs to be aligned
“hard” to the left*

With the data

```
file0 = "/raid/jobs/images/IMG20001.jpg"
file0.name = "IMG20001.jpg"
file0.comm = "Lighten up product section a bit"
file1 = "/raid/jobs/images/IMG23201.jpg"
file1.name = "IMG23201.jpg"
file1.comm = "Perfect!"
file1 = "/raid/jobs/images/IMG54532.jpg"
file2.name = "IMG54532.jpg"
file2.comm = "Make background darker"
file1 = "/raid/jobs/layout/Flyer.indd"
file3.name = "Flyer.indd"
file3.comm = ""
```

The section will be expanded to:

```
Files
File: IMG20001.jpg
Comment: Lighten up product section a bit"
File: IMG23201.jpg
Comment: Perfect!"
File: IMG54532.jpg
Comment: Make background darker"
File: Flyer.indd
Comment:
```

In addition to the tag for multi-line repetitions, there is a tag for logics. The logics tag can test for 4 different criteria: token exists, token does not exist, token equals value and token does not equal value. The logics tag is almost identical to the loop tag and also needs to be placed to the left.

#TOKEN?<#	token exists and has a value
#!TOKEN?<#	token does not exist or does not have a value
#TOKEN==VALUE?<#	token exists and equals value
#TOKEN!=VALUE?<#	token does not exist, has no value or does not equal value
#TOKEN?>#	closing tag for the different versions of the logic tag

To illustrate how the logics work, let us assume we have the following tokens in our dataset:

```
mytoken = test
anothertoken = 123
```

Also, lets assume that the lines below makes up the template:

```
---
#mytoken?<#
this is the value for mytoken: #mytoken#
#mytoken?>#
---
#!mytoken?<#
there is no value for mytoken
This will also be printed if there is no mytoken
#mytoken?>#
---
#anothertoken==123?<#
anothertoken definitely has the value: #anothertoken#
This will also be printed. I can also use this here: #mytoken#
#anothertoken?>#
---
#yetanothertoken!=456?<#
Nope, we dont have a token yetanothertoken with the value 456
#yetanothertoken?>#
---
```

When processed, all the dotted lines will be included since they are all outside any logic sections.

The first logic section encountered is “#mytoken?>#” which comes out as *true* since “mytoken” does exist and has a value (TEST). The lines between the starting and ending tokens are then processed and inserted. In this subsection, the same token is used to put in the data: “this is the value for mytoken: TEST”

The second logic section, “#!mytoken?<#”, is evaluated as *false* since “mytoken” exist and has a value.

The third section uses the logics “#anothertoken==123?<#” which evaluates to *true* since the value of “anothertoken” exist and equals 123. The lines up to but not including the end logic tag, are processed and included.

The last logic test is “#yetanothertoken!=456?<#” which also evaluates to *true* since the token “yetanothertoken” is NOT in the dataset. The lines up to, but not including the end logic tag, are processed and included.

The final output of merging the template with the dataset is:

```
---
this is the value for mytoken: TEST
---
---
anothertoken definitely has the value: 123
This will also be printed. I can also use this here: TEST
---
Nope, we dont have a token yetanothertoken with the value 456
---
```

Some of the email and report data produced by InterAct is specifically added to be used for logic

control. This makes it possible to “trigger” certain parts of the mail or report templates when specific criteria are met. For example, there is a token named “hasconv” that is created and added with a value=”1” when there is a conversion setting used on the order.

Following is an example from the **textonly adm** mail template:

```
#hasconv?<#
Custom conversion: #conv.custom#
Details:
ICC #conv.icc#
Resolution: #conv.res#
Format: #conv.format#
Scale: #conv.scale#
Width: #conv.width#
Height: #conv.height#
Usm: #conv.usm#
Pad: #conv.pad#
#hasconv?>#
```

With the data

```
hasconv = "1"
conv.pad = "-"
conv.usm = "-"
conv.height = "3"
conv.width = "3"
conv.scale = "in"
conv.format = "png"
conv.res = "72"
conv.icc = "sRGB"
conv.custom = "Web thumbnails"
```

The section will be expanded to:

```
Custom conversion: Web thumbnails
Details:
ICC sRGB
Resolution: 72
Format: png
Scale: in
Width: 3
Height: 3
Usm: -
Pad: -
```

If the same template is being used in a setup where no conversion is being used (or selected), there will be no “hasconv” token in the dataset array and the section will be ignored.

The table below describes the different types of tokens that can be used in an email or report template.

TOKEN TYPE	DESCRIPTION
#NAME#	Simple token to be replaced.
##	Replace with # (single #)
#NAME@#	Repeatable token. Will repeat for data NAME0, NAME1, ...

TOKEN TYPE	DESCRIPTION
#NAME@<# ... #NAME@>#	Repeatable token section. Will repeat entire section between start and end token for data NAME0, NAME1, ... and replace each section with the corresponding values of NAME0, NAME1, ...
#NAME?<# ... #NAME?>#	Logic token. The section between start and end token will be processed if data NAME exists and has a value.
#!NAME?<# ... #NAME?>#	Logic token. The section between start and end token will be processed if data NAME does not exist or exists but has no value.
#NAME==VALUE?<# ... #NAME?>#	Logic token. The section between start and end token will be processed if data NAME exists and has a value exactly equal to VALUE
#NAME!=VALUE?<# ... #NAME?>#	Logic token. The section between start and end token will be processed if data NAME does not exist or exist and has a value not equal to VALUE

5.4 Email template content

The data array available to the email is generated by InterAct and is unique for every order. In addition to the order data, the strings from the user's language file are included in the array.

The variables are listed in the table below. Note that some data can be accessed from multiple names. In the table all the numbered variables are noted as tokenN, where N will be replaced by 0,1,2,... In some cases there are subsets of numbered variables (within jobN). These are noted as tokenK.

TOKEN NAME(S)	DESCRIPTION
user, user.name	user account name (login)
user.group	user primary group
user.address	ip address of user
notif.admin	email address used for admin email
notif.receipt	email address used for receipt
setup.mailsender	mail reply to address that has been set up in the base config or posted from form
setup.outsideurl	the server outside url that has been set up in the base config
order,order.name	order name
order.id	order session ID
order.date	orderdate (format: Day Month DD YYYY, HH:MM:SS)
order.cdate1	orderdate (formatted according Custom Date 1, base config)
order.cdate2	orderdate (formatted according Custom Date 2, base config)
order.cdate3	orderdate (formatted according Custom Date 3, base config)
order.uptime	orderdate formatted as UNIX timestamp
order.nfiles	Number of files in order
order.sizeemb	Total filesize in MB
order.info	Info about order as specified in setup
hasinfo	exists and set to 1 if order.info has value
order.action	name of action to run
order.actargN	value on action argument N

TOKEN NAME(S)	DESCRIPTION
order.actargnameN	name of action argument N
order.ACTARGNAMEN	value on action argument N
Example:	order.actarg0 = /FP_VOLS/noWeb/TRA_Collect order.actargname0 = PATH order.PATH = /FP_VOLS/noWeb/TRA_Collect
hasconv	exists and gets value 1 if conversion options has been selected
conv.custom	Name of conversionlist chosen or "Full" or empty if no conversion
conv.format	Format used
conv.ftype	High FPO
conv.height	Height when using scaling
conv.width	Width when using scaling
conv.icc	sRGB
conv.pad	Padding
conv.res	Resolution
conv.scale	Scale (Type): in, cm, mm, % ...
conv.usm	Selected USM
conv.width	Width when using scaling
hasfiles	exists and is 1 if there are files in the order
fileN,fileN.path	path to file
fileN.name	name of file
fileN.name_noext	name of file, without any extension
fileN.ext	extension on file, if any
fileN.idx	index in filelist, 0,1,2,...
fileN.sizemb	File size in MB
fileN.urlpath	Path encoded for URL
fileN.wnurl	WebNative URL for path, imageinfo or listdir
fileN.portalurl	WebNative Portal URL for path, imageinfo or browse
fileN.comm	Comment on file posted from form. When running action Sendmailcomment
fileN.ventnameK	fieldname of venture metadata for file N, field K When running actions and reports, not notifications
fileN.ventcontK	content of venture metadata for file N, field K When running actions and reports, not notifications
fileN.vent.FIELDNAME	content of venture metadata for file N, venture field with name FIELDNAME When running actions and reports, not notifications
fileN.meta.FIELDNAME	content of repeated form wizard field for file N, field with name FIELDNAME
fileN.metanameK	fieldname of repeated form wizard field for file N, field K
fileN.metacontK	content of repeated form wizard field for file N, field K
hasmeta	exists and is 1 if there is any order metadata values
order.metanameK	name of ordermetadata (from orderform), metadata K where K=0,1,2,3...
order.metacontK	content of ordermetadata (from orderform), metadata K where K=0,1,2,3...
order.METADATANAME	content of ordermetadata (from orderform), metadata with name METADATANAME
hasreg	set to 1 if there is InAlias data for the user
register.metanameK	name of InAlias registration data, data K where K=0,1,2,3...

TOKEN NAME(S)	DESCRIPTION
register.metacontK	value of InAlias registration data, data K where K=0,1,2,3...
register.REGISTNAME	value of InAlias registration data, where REGISTNAME is the corresponding name of the InAlias metadata field

5.5 Reports & Receipts

InterAct writes reports and receipts upon completing an order. A receipt is always written into the collect folder and the name and content can be controlled. The report is written to a specific path and appended to any existing file that may be residing at the path. The report path can include tokens pointing to information in the order or date and user information.

Reports and receipts are created in the same way as the Emails, using templates and tokens for content. See section *5.4 Email template content* for more information.

5.6 Reports & Receipts template format

The templates for reports and receipts are saved to the same **reports** setup folder (/usr/tracker/setup/reports) and share the same templating technology as the email notifications.

Named tokens embedded in “#” characters are used to draw information unique to the specific order and lines and sections can be looped and logically selected.

The actual information that can be used for the reports and receipts is the same as that used for the notification emails (see above). Using the report and receipt templates it is easy to make files that can be used for imports into other systems, or into spreadsheets or displayed in other ways.

Example of a report template to create a tab-delimited file:

```
#order.name#<tab>#order.cdate1#<tab>#file@.name#<tab>#file@.vent.ProjectID#
```

With the data

```
order.name = "baggins.1356047497"
order.date = "2012-02-14"
file0.name = "Spring Brochure.indd"
file0.vent.ProjectID = "2012-04-1234"
file1.name = "Final Booklet.pdf"
file1.vent.ProjectID = "2012-01-2345"
```

The report will be expanded to:

```
baggins.1356047497<tab>2012-02-14<tab>Spring Brochure.indd<tab>2012-04-1234<tab>
baggins.1356047497<tab>2012-02-14<tab>Final Booklet.pdf<tab>2012-01-2345<tab>
```

If the path for the report points to a file that already exists, the report will be appended automatically to the existing file. If there is no file, it will be created.

InterAct will write a header to the report when a new report file is created if there is a header section in the template. A header is created by adding a section delimited by <Head> and </Head> “tags” in the template.

In the example above, we could update the template like this:

```
<Head>
Order name<tab>Date<tab>File<tab>Project
</Head>
#order.name#<tab>#order.cdate1#<tab>#file@.name#<tab>#file@.vent.ProjectID#
```

InterAct would create the following file (if this was the first entry to the file):

```
Order name<tab>Date<tab>File<tab>Project
baggins.1356047497<tab>2012-02-14<tab>Spring Brochure.indd<tab>2012-04-1234<tab>
baggins.1356047497<tab>2012-02-14<tab>Final Booklet.pdf<tab>2012-01-2345<tab>
```

Just like with emails, it is possible to create loops over single or multiple lines (or combinations of both).

5.7 Reports & Receipts path and names

The receipt can only have its name configured. It is always written to the collect folder.

The report path is dynamic and can include the same data as the report itself. The path needs to point to the resulting file and when specifying the path out of static and dynamic segments the different portions are “glued” together using the “&” char:

```
/myRaid/reports/InterAct/&user.group&/&date(%Y-%m)&.txt
```

Runing an order on Feb 20, 2011 with the data

```
user.group = "hobbits"
```

The path would translate to:

```
/myRaid/reports/InterAct/hobbits/2012-02.txt
```

For more information about the date command formats see the appendix on the UNIX date command or equivalent.

6.1 Working with the Venture database

InterAct has the ability both to read from the Xinet Venture database and to write back to the database. Typically one would read in order to include data from the database in a report or export and write to update files on statuses used for workflow purposes or recordkeeping.

Some of the plugins also use the database as part of their own workflow like InterAct Project Creator or InterAct Movefiles.

6.1.1 Reading from the database

In order to read a field from the database to be used in a report, the appropriate fields needs to be listed in the **Retrieve database fields** input on the **Database** tab for the plugin setup.

Multiple fields can be listed using comma-separation.

It is also possible to type in the value **userperms** in which case InterAct will look at the database userperm setting for the user in question and determine what fields to read.

Retrieve database fields: Client,JobID,Jobstatus

☐ Retrieve database fields for plugin (to be used in custom styles)

Write export file: No Export

Export file template:

Retrieving specific fields

Retrieve database fields: userperms

☐ Retrieve database fields for plugin (to be used in custom styles)

Write export file: No Export

Export file template:

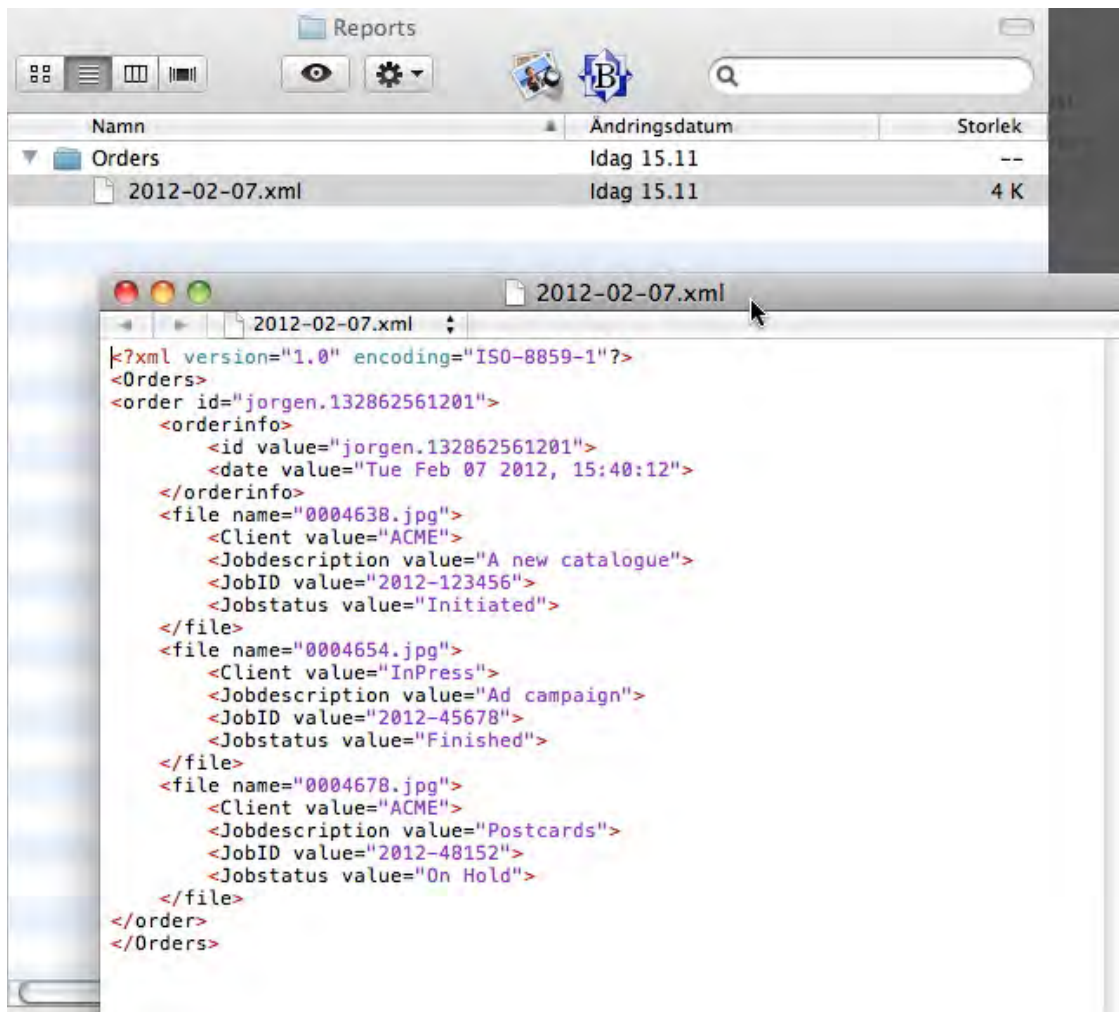
Retrieving fields set by userperms

The values that are collected in this manner can be used from the reporting and in the actions. The data will not be part of the content that is passed to the regular order notifications to the user and admin.

Report template: sampleOrderXML

Report output path: /FP_VOLS/noWeb/Reports/Orders/&date()&.xml

Setting up a report using a sample report template



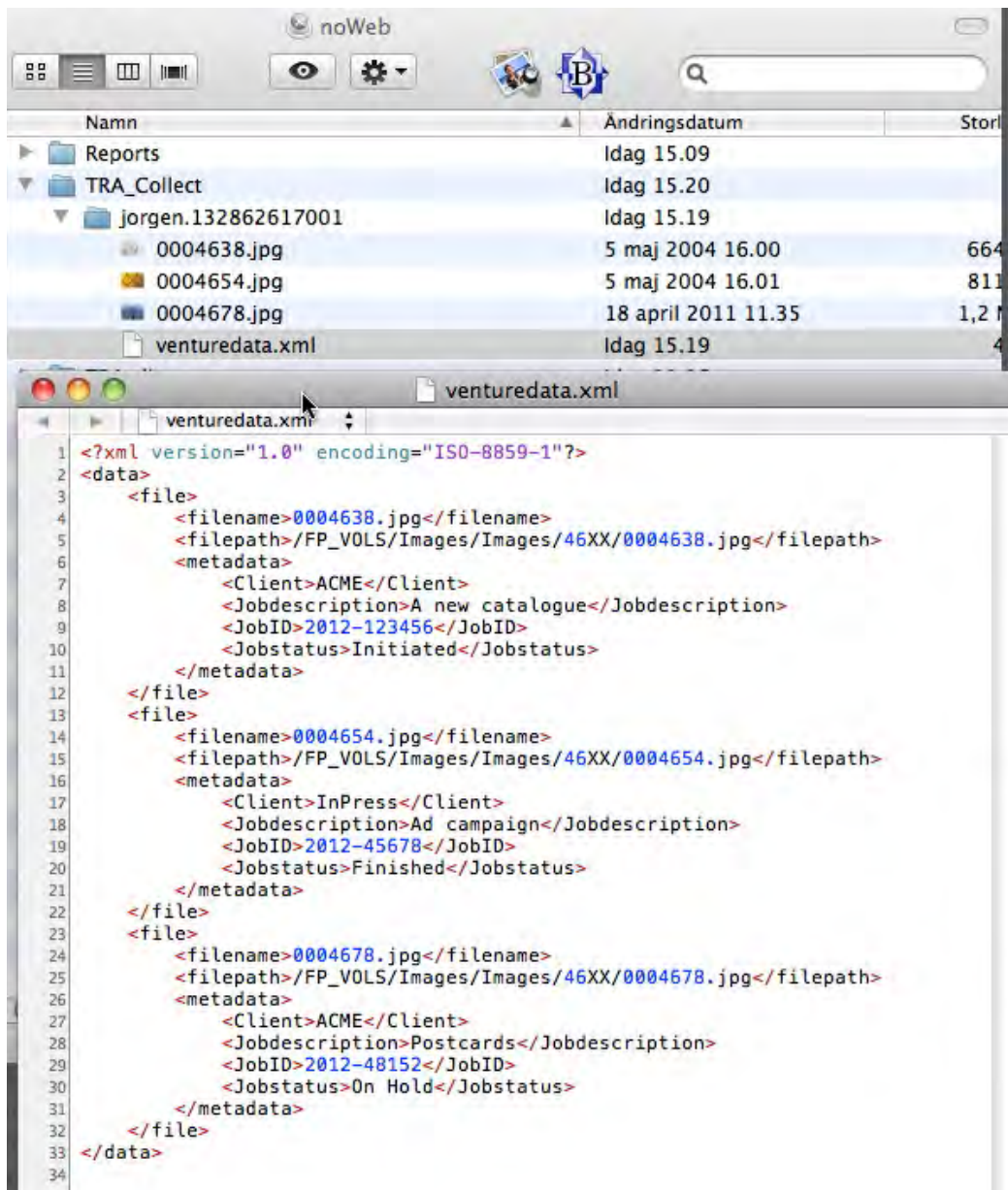
Report path is parsed and the report written. The reportfile was created.

6.1.2 Making exports from the database

The specified fields can also be exported into database export files. The export can either be a single export for all the files in the order or as one export per asset.

The export files are added to the collect folder which means that they will be part of a package that is downloaded via link or sent via ftp. It will also be in a collect type order. If using the send mailcomment action, the export file will be attached.

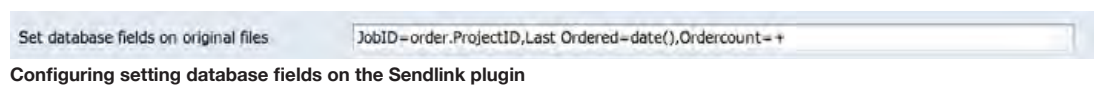
Retrieve database fields	userperms
Write export file	<input type="checkbox"/> Retrieve database fields for plugin (to be used in custom styles)
Export file template	One export for all files
	multi-iiXML



6.1.3 Writing to the database

Writing back to the database can be useful both in many scenarios. InterAct has the ability to record values that are part of the order, like usernames and data collected in the additional forms and add this information into the database.

For example, in an asset request scenario, the user has to give the current Job id as to what the assets are needed for. This id is written into the database in a field. In another field, a counter is kept to record the number of times the asset has been requested and in a third field, the date of the last request is maintained.



Configuring setting database fields on the Sendlink plugin






















InterAct Send Maillink

E-mail

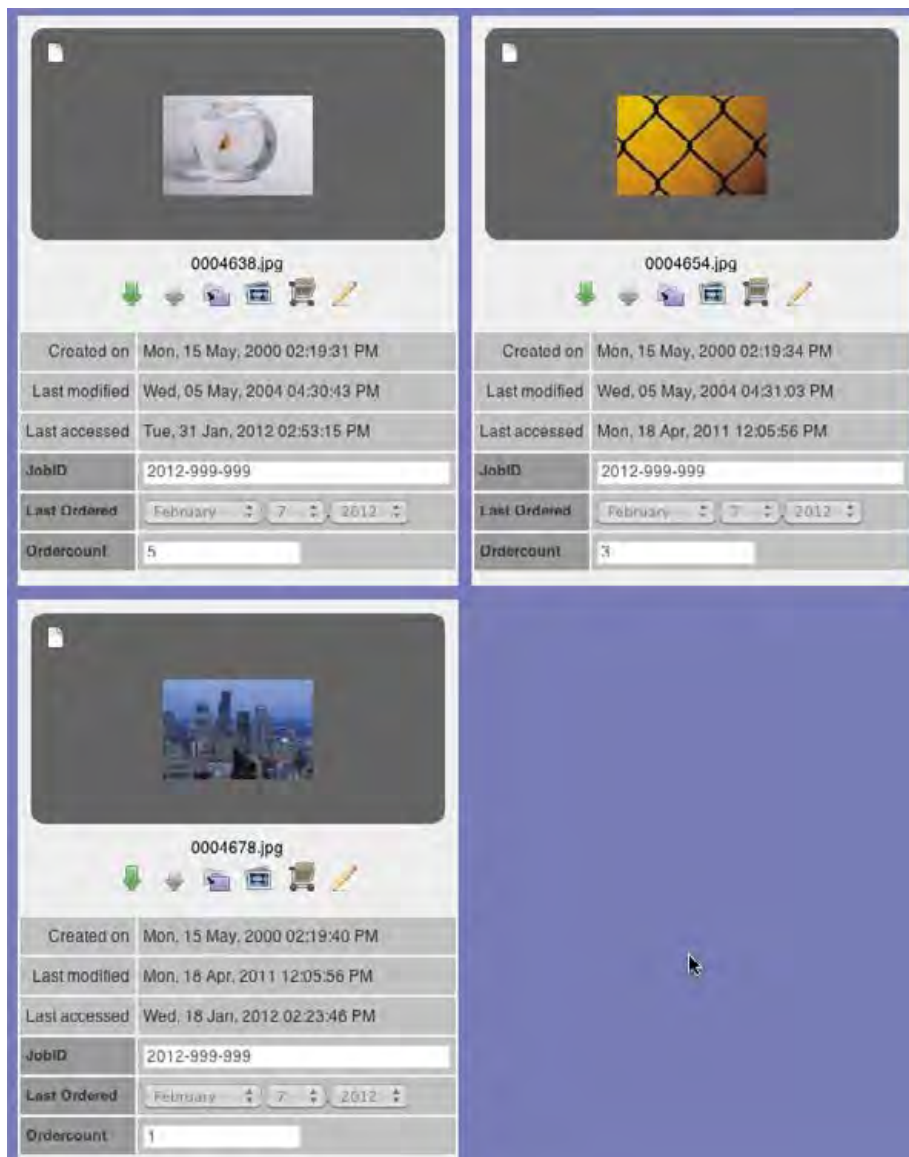
E-mail message

Project ID*

Using the plugin with an additional field to collect the Project/Job ID

			
0004638.jpg		0004654.jpg	
<div>       </div>		<div>       </div>	
Created on	Mon, 15 May, 2000 02:19:31 PM	Created on	Mon, 15 May, 2000 02:19:34 PM
Last modified	Wed, 05 May, 2004 04:30:43 PM	Last modified	Wed, 05 May, 2004 04:31:03 PM
Last accessed	Tue, 31 Jan, 2012 02:53:15 PM	Last accessed	Mon, 18 Apr, 2011 12:05:56 PM
JobID	<input type="text" value="2012-123456"/>	JobID	<input type="text" value="2012-45678"/>
Last Ordered	July : 3 : 2011 :	Last Ordered	January : 1 : 2012 :
Ordercount	<input type="text" value="4"/>	Ordercount	<input type="text" value="2"/>
			
0004678.jpg			
<div>       </div>			
Created on	Mon, 15 May, 2000 02:19:40 PM		
Last modified	Mon, 18 Apr, 2011 12:05:56 PM		
Last accessed	Wed, 18 Jan, 2012 02:23:46 PM		

Databasefields before being updated by InterAct



Databasefields after being updated by InterAct

6.2 Customizing look and feel

The look and feel of InterAct can be customized by adding a Logo that will be displayed on top of all the InterAct Plugins and by adding a custom CSS to style the interface.

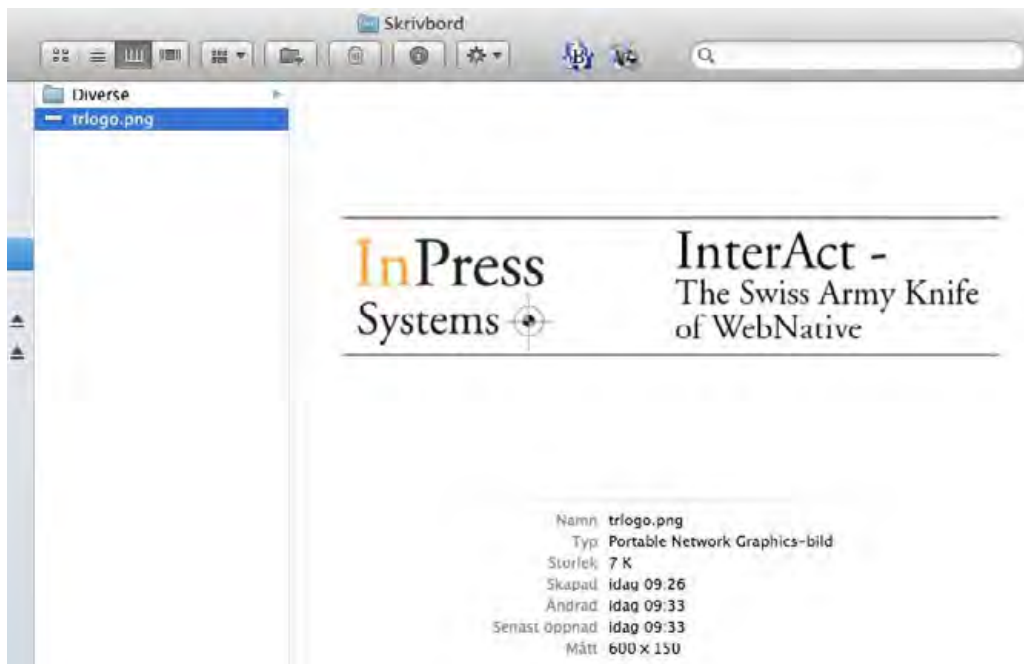
Both Logo and CSS can be added by user or group.

If InterAct is being used from a Xinet WebNative Portal site where IPIK is installed, it is also possible to add a CSS file that is specific to the Portal site. This will rewrite IPIK version 5 and Portal 4.

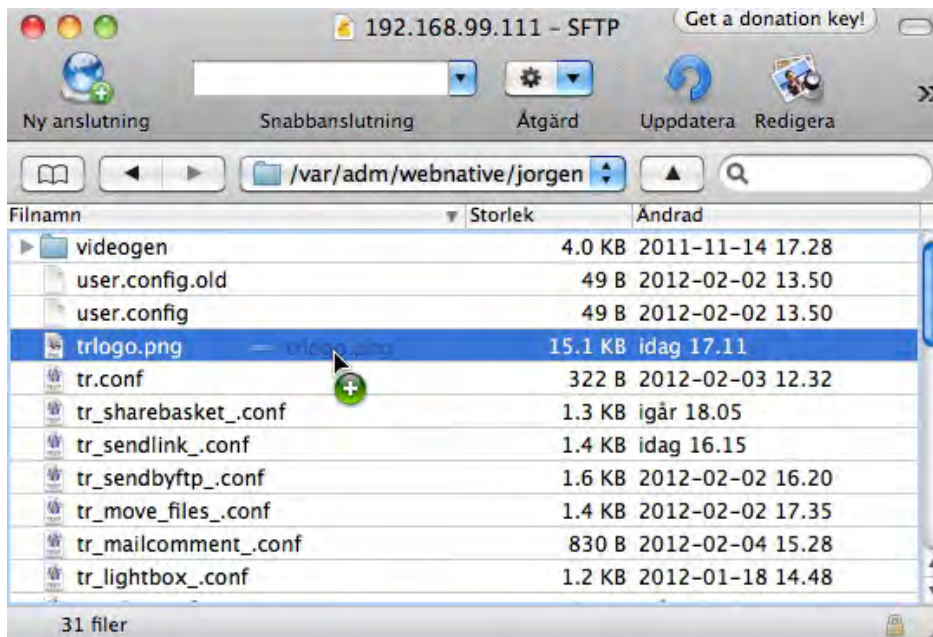
6.2.1 Add an InterAct logo

In the user directory in WebNative (/var/adm/webnative/USERNAME) upload an image that is named trlogo.gif|jpg|png. It will be automatically recognized by InterAct and be added at the top of the form.

The logo can also go into the group folder and will be applied to each user that has that group as a primary group. A userlogo will always override a grouplogo if the user has both a userlogo and a grouplogo.



Create a logo (banner) and name it trlogo.png (or .jpg or .gif)



Save the logo to the user (or group) folder in /var/adm/webnative

InterAct adds the logo (banner) on top of the page.

6.2.2 Add an InterAct CSS

The InterAct interface has CSS classes applied to the interface. The default css is supplied by InterAct. It is possible to insert a style sheet file that can be used to override the default classes.

The CSS can be supplied on the backend WebNative server or if accessing via WebNative Portal, inside the Portal Site folder.

6.2.2.1 InterAct classes

Most elements in the InterAct interface have classes associated with them. Below is a list of the most important classed followed by an illustration.

CLASS / ID / TAG	DESCRIPTION
body	Use body to change for example background color of area outside form.
#int_topheader	Id of empty div outside and above the contentbox. Can be used to add custom content.
#int_contentbox	Id of main area holding the form. As default uses a grey background.
#int_contentboxheader	Id of empty div at top of the contentbox. Can be used to add custom content.
.int_headline	Plugin headline
.int_info	Informative text at the top of the form
.int_label	Label to the left of a field
.textField	Text input field
.textArea	Textarea input
.int_combobox	Select/Textinput combination for “smart” selects
.formButton	Buttons in form
.formButtonSmall	Small buttons in some of the forms
.int_colhead	Column header for a field in a repeated block
.int_repeatlabel	label to the left side of a repeated block

CLASS / ID / TAG	DESCRIPTION
.navlinkbase	First link in a browse/navigation section
.navlink	Following links in a browse/navigation section
.navlinkselect	The select in a browse/navigation section

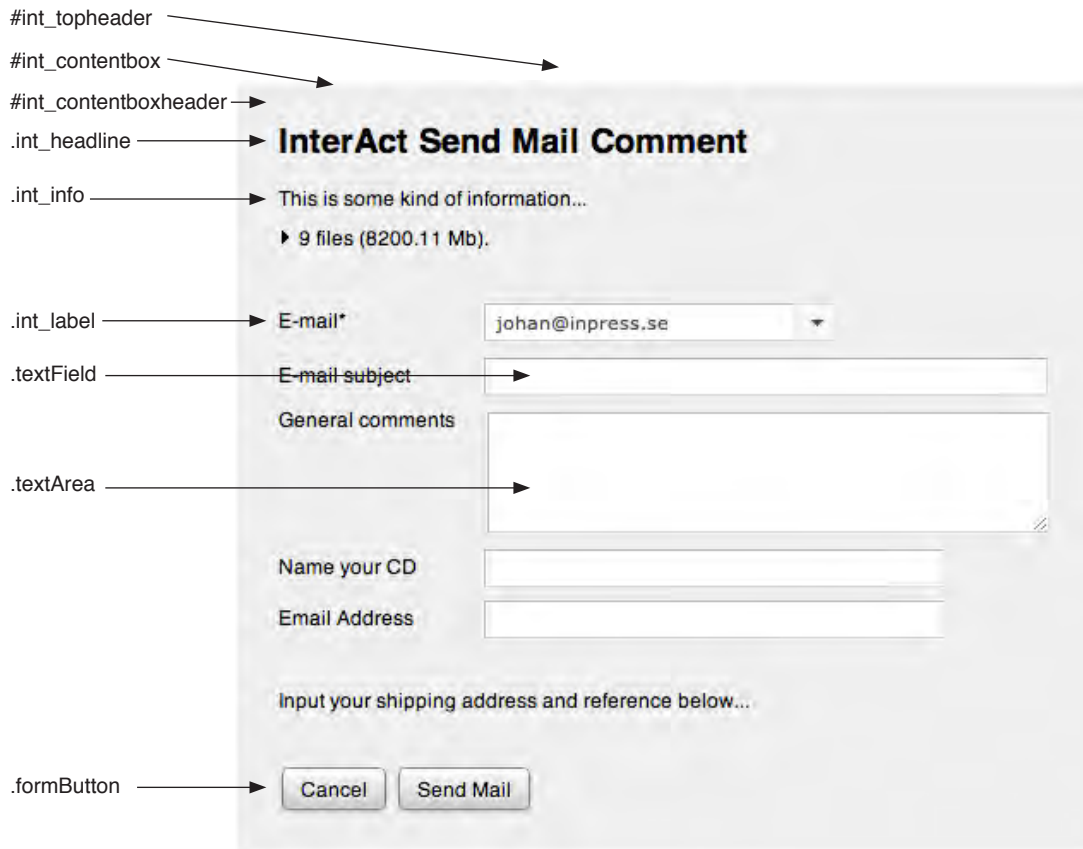


Illustration of some classed and ids in the InterAct interface

6.2.2.1 InterAct CSS file on the WebNative server

The main css being used is named **default.css** and it is located in **/usr/tracker/setup/css**. To make global changes, do not edit the **default.css** since it will be updated when upgrades are made. It is possible to create a **default.local.css** file that will be loaded and not be automatically upgraded.

To make a user specific change, save a style sheet file into the user directory in WebNative (**/var/adm/webnative/USERNAME**). The style sheet file name should be **tr.css** and will be used for all the InterAct plugins configured on the user. Note that the css file is linked to the output so it should NOT have any style sheet start and end tags.

The css file can also go into the group folder and be applied to users that have that group as primary group. A user css will be applied if a user both has a user css and a group css.

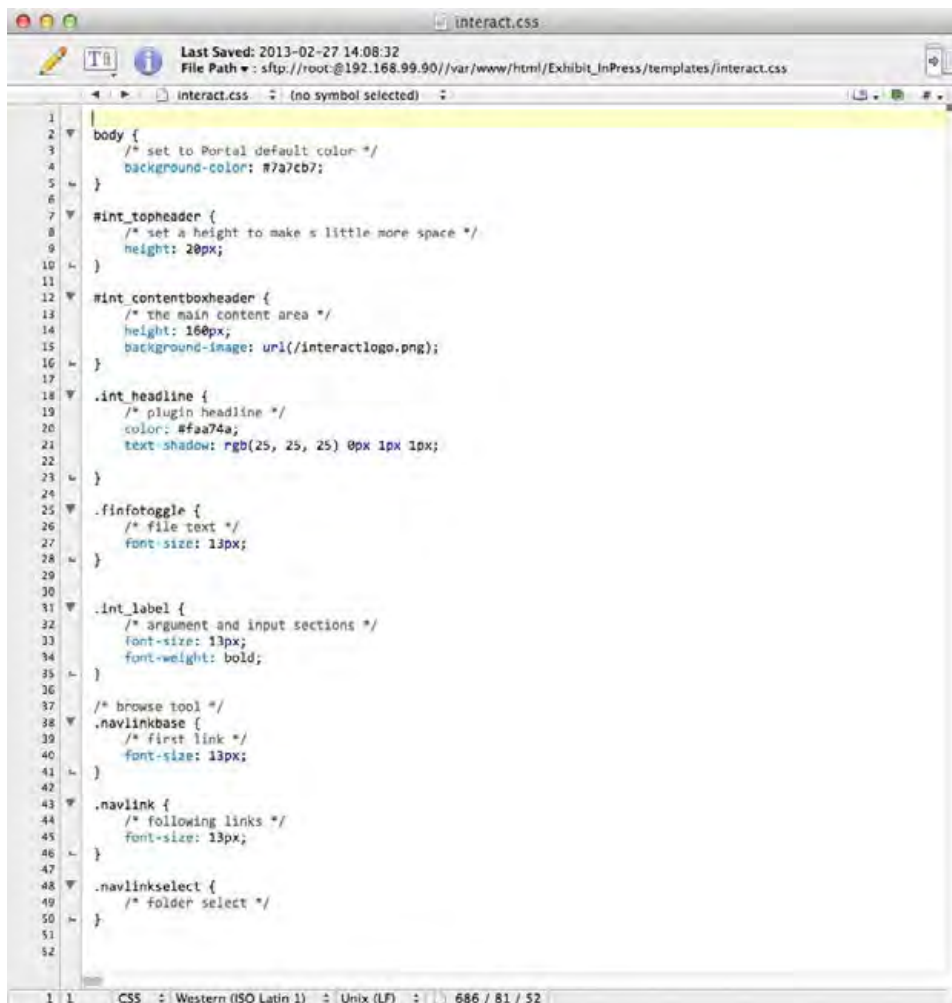
6.2.2.2 InterAct CSS file on the WebNative Portal server

Save a style sheet file into the template folder inside the Portal site. The css file should be named **interact.css**. Note that this feature only work on Portal 4 servers and when IPIK with at least version 5 is installed.

6.2.2.3 InterAct CSS file example

Following is an example of an interact.css file added in the Portal site. No logo has been added as per 6.2.1. Instead the **#int_contentboxheader** id is used to supply a header.

Contents of the css file (interact.css inside the templates folder of the Portal site):



```
1 |
2 | body {
3 |     /* set to Portal default color */
4 |     background-color: #7a7cb7;
5 | }
6 |
7 | #int_topheader {
8 |     /* set a height to make a little more space */
9 |     height: 20px;
10 | }
11 |
12 | #int_contentboxheader {
13 |     /* the main content area */
14 |     height: 160px;
15 |     background-image: url(/interactlogo.png);
16 | }
17 |
18 | .int_headline {
19 |     /* plugin headline */
20 |     color: #faa74a;
21 |     text-shadow: rgb(25, 25, 25) 0px 1px 1px;
22 | }
23 |
24 | .finfotoggle {
25 |     /* file text */
26 |     font-size: 13px;
27 | }
28 |
29 |
30 | .int_label {
31 |     /* argument and input sections */
32 |     font-size: 13px;
33 |     font-weight: bold;
34 | }
35 |
36 |
37 | /* browse tool */
38 | .navlinkbase {
39 |     /* first link */
40 |     font-size: 13px;
41 | }
42 |
43 | .navlink {
44 |     /* following links */
45 |     font-size: 13px;
46 | }
47 |
48 | .navlinkselect {
49 |     /* folder select */
50 | }
51 |
52 |
```

Css file save to Portal site

And the resulting look and feel:



Resulting page

6.3 Input filters

Input Filters can be applied to some of the input fields for Arguments and for input fields from Form Wizard forms. A filter is applied to the data when the user changes the value.

InterAct ships with a number of default filters and it is possible to add new filters to the system.

To specify an input filter, select the desired filter from the list. In the Action arguments section the filterlist will be shown to the right of the default value and in the Form Wizard it is beneath the Tooltip text.

Argument	Title	Help	Default value	Input filter	User entry
E-mail*	E-mail	Edit	[user]		Yes*
E-mail subject	E-mail subject	Edit	Feedback on assets	✓	
E-mail message	E-mail message	Edit			
Comment per file			Yes		
Include thumbnails	Include thumbnails	Edit	Yes		
Include keywords	Include keywords	Edit	Usage,Ownership,End rights,Jobnumber		
Apply comment to keyword			Notes=<FILECOMMENT& [date()]&\n(1)		

Add input filter on Action argument

» Edit element for form "Collect_form"

Type: Textfield

Element Title: Project ID

Element Name: PROJECTID

Default Value:

Tooltip Text:

Input Filter: ✓

Element Width:

Max Characters that can be entered:

Readonly, No edit:

Required:

Dismiss Save

Add input filter on Form Wizard field

Following filters are standard:

FILTER	DESCRIPTION
Lowercase	Current text is scanned. All characters forced to lowercase.
Namecase	Current text is scanned. Initial character of word is forced to uppercase and all ensuing characters are forced to lowercase.
NoEmail	Trailing text beginning with a "@" is removed. Suitable to use when email address domain is added as suffix or other method.
Uppercase	Current text is scanned and any character given in lowercase will be changed to uppercase.
Uppercase_SpaceToUnderscore	Current text is scanned and any character given in lowercase will be changed to uppercase. Spaces are replaced with "_" (Underscore)
only_Ascii	Current text is scanned and any text that is NOT a-z, A-Z, 0-9, "_", "-" or "." is removed.
only_AsciiNoNum	Current text is scanned and any text that is NOT in the range a-z or A-Z is removed.

Input filters are javascript functions that are saved to files and automatically included into the interface when the plugin opens.

It is possible to add a new input filter by adding a file in /usr/tracker/setup/infilters. When the file is added, it will be selectable from the administrations interface.

The filename MUST MATCH the function declaration in the file.

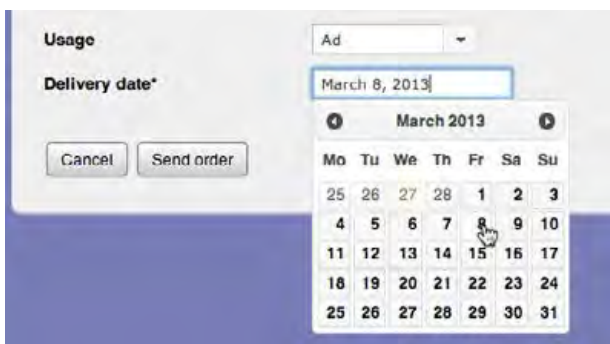
6.4 Date picker

A “datepicker” input that displays a small calender where a date can be selected can be displayed on a few Action arguments and also on a Form Wizard form. When the “calender” is used to pick the date, the resulting date is inserted into the field using a predefined format.

When a Date input is added to in the Form Wizard, the format is decided from a pulldown showing the different formats that are supported.



Creating a Date field in the Form Wizard



Using the Date input field

When a Date input is added for an action argument, it can be added using an argument palette (see 4.2.2). It may also be added by inputting the manual equivalent of the datepicker palette choice: **[date]**.

When using the manual datepicker a format can also be supplied. The format corresponds to one of the options in the select used in the form wizard setup above. When supplying a format, it should be added after date like: **[date:format]**. Example:

[date:MM d, yy]

Will produce a date picker for inputting date as above, i.e. **January 31, 2020**

Following formats can be used:

MM d, yy	January 31, 2020
M d, yy	Jan 31, 2020
m/d/y	1/31/20

m/d/yy	1/31/2020
d MM yy	31 January 2020
d M yy	31 Jan 2020
d/m/y	31/1/20
d/m/yy	31/1/2020
yy/m/d	20/1/31
yy/m/d	2020/1/31
yy-mm-dd	2020-01-01 (default)

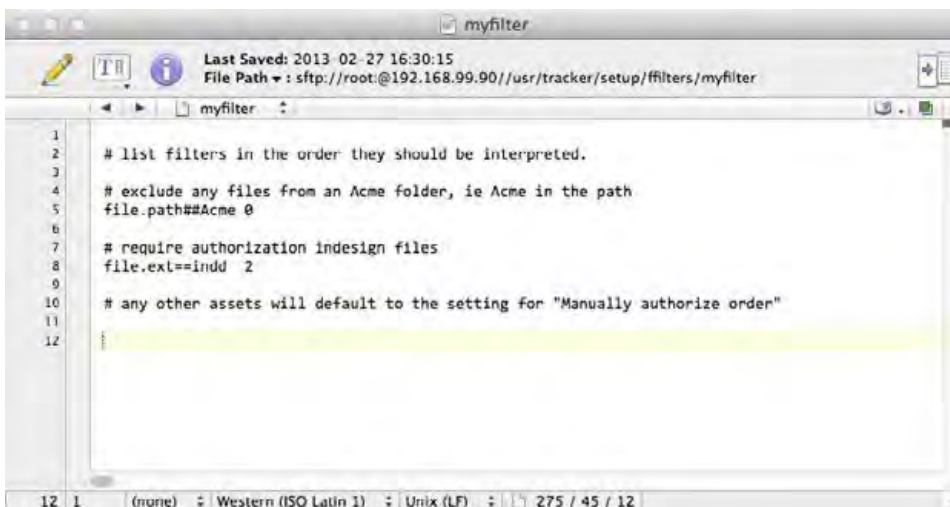
Note that Arguments that specifically expect a date value like **Expiry** on **Asset link** or **Asset Review** (although these also can use a number of hours) require the iso8601 date yy-mm-dd which also is the default format.

6.5 File filters

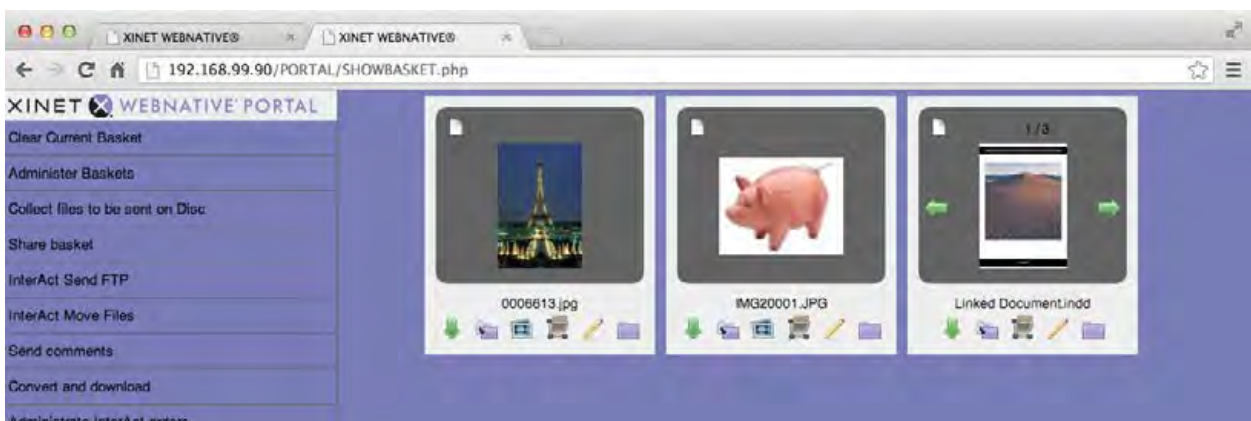
When InterAct loads it will look at the supplied basket of items or single item and go through a process to validate the assets. All validated assets are added to the internal InterAct basket and processed directly or held awaiting authorization “Manually authorize” setting on the Base & Action tab on the plugin.

By using file filters it is possible to decide per asset if it is not valid, needs authorization or can be processed directly. Following example illustrate the use of a simple filter and how that shows up in the interface:

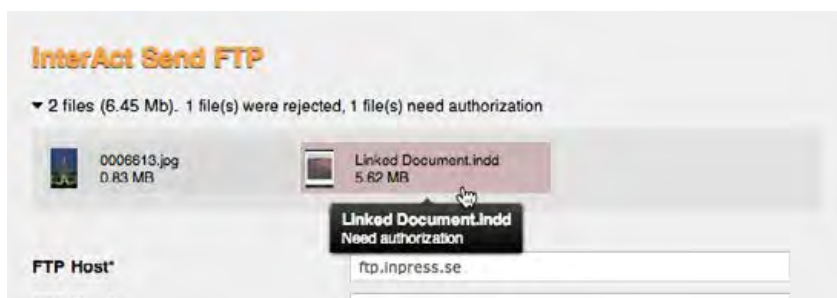
Following filter is saved and selected from the admin gui on the Send by FTP plugin:



A few items are added to the basket. One happen to be in a folder named “Acme Products” and one is an InDesign file.



We open the Send FTP plugin and see the following in the file detail area:



One file has been rejected and one of the two accepted files will require authorization.

6.5.1 File filter rules

A file filter is a list of rules deciding what to do with an asset. InterAct will consult the list of rules for each asset and use the first rule that matches the asset to decide its status: “nonvalid”, “needs authorization” or “process now”.

If no rule is matched to the asset, the asset is deemed valid and the plugin setting for “Manually authorize” will decide if authorization is needed.

The rules to be used in a filter should be listed in a textfile (isolatin, UNIX linebreaks) and saved to the interact file filter folder:

```
/usr/tracker/setup/ffilters
```

The files in the **ffilters** folder are listed and can be selected from the admin gui on the **Files, Conversion & Access** tab. Note that all plugins may not allow for the use of file filtering.

Each rule is specified on its own line in the file and is composed of a Type, an Operator, a Value and a Return:

```
TypeOperatorValue<tab>Return
```

Type is the type of test, for example : file.name, db.KEYWORDNAME.

Operator is the operator to use for the test, for example : ==, !=

Value is the value to test against, for example : STRING, Filesize, date

Return is how to interpret a match to the test: 0 (dont include file), 1 (include file), 2 (include file but require authorization)

Example Rules:

file.ext==sit	0	exclude any sit files
db.Lockdate<date()	0	exclude assets where keyword “Lockdate” has passed
file.size>102400	2	require authorization on files larger than 100 MB
file.isdir	0	exclude folders

TYPE	OPERATORS	VALUE / DESCRIPTION
file.name	== (equals) != (does not equal) ## (contains) !# (does not contain)	String Compare filename using == or != Look for substrings using ## or !# <i>file.name==foo.jpg</i>

TYPE	OPERATORS	VALUE / DESCRIPTION
file.path	## (contains) !# (does not contain)	Strings Look for substrings using ## or !# <i>file.path##/TEMP/</i>
file.ext	== (equals) != (does not equal)	String Match certain extensions: <i>file.ext!=png, file.ext==sit</i>
file.size	< (less than in kB) > (larger than in kB)	Number. Check filesize <i>file.size>1024</i>
file.isdir	== (equals)	0/1. 0=file, 1=folder, check if file or folder: <i>file.isdir==1</i>
db.KEYWORDNAME	== (equals) != (does not equal) ## (contains) !# (does not contain) < (less than) > (larger than)	Read value from keyword <i>Keywordname</i> associated with the asset. Depending on fieldtype and given value, different tests will be performed. String: compare or contain a literal string. Example, test for contains a string: <i>db.aTextField##My Literal string</i> <i>db.anotherTextField!=Unfinished</i> Numerical: compare to a numerical value. <i>db.NumField<123.5</i> <i>db.anotherNumField==100</i> Boolean: check for 1 (yes/true/checked) or 0 (no/false/unchecked). <i>db.myBool==1</i> Date. Check for literal date, current date or dateoffset <i>db.myDate>2012-12-31</i> <i>db.expiresDate>date(-7)</i> <i>db.allowedDate<date()</i>

A sample filter is included in the distribution.

7 INTEGRATING WITH WEBNATIVE PORTAL

The InterAct software installs on the backend WebNative server but can be used both from WebNative and WebNative Portal environments.

To make integration into Portal environments easier and to achieve a higher level of functionality, install the InPress Portal Integration Kit (IPIK) on the Portal server accessing the WebNative server. IPIK is free for any user with a current maintenance contract with InPress Systems for InterAct.

A few functions, like the Asset Review plugin or Asset Link require installation of IPIK version 5 on the Portal server to function.

7.1 InterAct plugins that require IPIK

Following InterAct 5 functions rely on IPIK version 5 to function via WebNative Portal. They also require Portal version 4:

- InterAct Asset Review
- InterAct Asset Link
- InterAct Asset Request
- InterAct Approval module

7.2 InterAct features that require IPIK

Renaming plugins in the Basket using the InterAct Admin utility also require IPIK.

IPIK also produces Tags to be used within Portal to access InterAct plugins that are “toplevel”, i.e. dont operate on the basket.

InterAct Asset request only operates via Portal.

For more information about IPIK please see www.inpress.se or contact InPress Systems. A manual for IPIK is available from www.inpress.se.

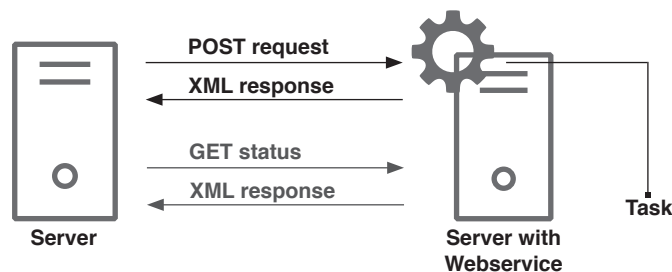
8.1 InterAct WebServices Overview

InterAct WebServices is a new add-on to InterAct (from version 5) that adds the ability to publish webservices on the WebNative server to access InterAct actions and other tasks. The InterAct WebService function requires an additional license to work and needs to be purchased separately. Since the function is an add-on to InterAct it will require the base InterAct license as well as a WebService add-on. Please contact InPress Systems for more information about licensing.

8.1.1 What is a webservice?

A webservice can be described in many ways, and means different things to different developers and systems. The W3C defines a webservice as *“a software system designed to support interoperable machine-to-machine interaction over a network”*.

In practice, the purpose of a webservice is to provide a service or function between systems. A webservice published by server B will enable server A to communicate with server B in order to get some information or perform some type of task. Server A will send a webservice request to server B which performs the request then sends a response back to server A.



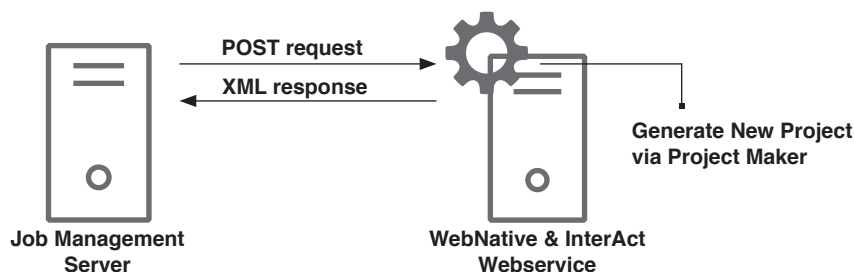
The communication between the servers in a webservice scenario can follow simple HTTP POST or GET rules or require more complex formatting like REST or SOAP.

8.1.2 How can InterAct WebServices be used?

InterAct WebServices gives access to a number of InterAct actions as well as some other internal actions. By configuring and publishing a webservice for an action, that service can be used by other servers like Job and Projectmanagement systems, Accounting, Marketing and Campaign management systems.

Example 1:

A Job management system connects to InterAct WebServices and use a service where the Project Maker creates a new Job on the fileserver automatically.



Example 2:

A Marketing management system connects to InterAct WebServices and use a service where the Asset Link action collects a number of items and ships them to a user in the Marketing management system.

Use the link Add Webservice to create a new service. Type in a name to use for the service, a comment (optional) and select what action that should be used for the service. It is also possible to copy an existing service.

The name is also used on the URL when connecting to the service and the only characters that are allowed are “a-z”, “A-Z”, “0-9”, “-”, “_”, and “.”.

The configuration interface for Webservices will be shown when the service has been added. The same interface can be reached by using the Modify button in the main listing.

A configuration may have four tabs depending on what action was selected: Base & Access, Action setup, File & Collect and Notifications & Reports.

8.2.1 Base & Access

This tab is used to control access to the service and configure comments etc.

SETUP	DESCRIPTION
Comment	A comment for admin use.
Description	The description text can be read from the webservice when requesting information.
Enable Service	The service needs to be enabled in order to accept connections.
Debug	Turning on debug will increase level of detail in information output.
Server URL	Serverurl used to build urls for reading updated statuses.
Restrict to WebNative users	List of WebNative users (comma separated: user1,user2,..) that are allowed to connect to service
Restrict to WebNative groups	List of WebNative primary groups (comma separated: group1,group2,..) that are allowed to connect to service-
Restrict to these server paths	Restrict operation to certain server paths. Only use files from here (for collect type actions) or only operate here (for create types of actions).

» Modify "sendFTP"

» **Base & Access** Action setup File & Collect Notifications & Reports

Comment: send assets via ftp

Description: This description will only be viewed from the info/test page

Enable service: Yes

Debug: No

Serverurl: http://192.168.99.90

Restrict to WebNative users: demo,john.doe,serviceuser,nativeadmin

Restrict to WebNative groups:

Restrict to these server paths: Volumes

Base configuration example.

8.2.2 Action setup

The action tab is used to control the action associated to the service. The options will reflect what action is being used.

The page will have a list of action arguments similar to the one described on the corresponding plugin (if there is one). The list of arguments show the expected **POST name** with an associated **Default value**. The value is used as the value of the argument or as a default value depending on the **Read POST** setting.

» Modify "sendFTP"

Base & Access » **Action setup** File & Collect Notifications & Reports

Argument	POST name	Default value	Read POST	Required
FTP host	FTPHOST	ftp://ftp.inpress.se	No	No
FTP username	FTPUSER	interact	No	No
Password	FTPPASS	abc123	No	No
FTP path	FTPPATH		No	No
Compression type	COMPRESSION	ZIP	Yes, select from list	No
Archivename	ARCHIVENAME		Yes, discard empty POST	No
Email recipient	EMAIL		Yes, discard empty POST	Yes
Email subject	SUBJECT	File delivery	No	No
Email message	MESSAGE	No Message	Yes, discard empty POST	No
Use Active FTP	ACTIVEFTP		No	No

This action will collect assets, make a ziparchive and send the archive through ftp/sftp

Example Action setup with some values "hard coded" and some expected as POSTs.

If the Argument has no selection pulldown, the following options can be selected in the Read POST select:

SELECTION	HANDLING
No	The default value is used
Yes, accept empty POST	A POST will be read. An empty POST value will be used and override the default. The default will be used if the POST is missing.
Yes, discard empty POST	A POST will be read. An empty POST value will be treated as a missing POST. The default will be used if the POST is missing
Yes, select from list	A POST will be read. Values listed in the Default value section are valid. Values should be listed with pipe separation: Value1 Value2 ...

SELECTION	HANDLING
Yes, select from folder	A POST will be read. Files and folder names from the path specified in the Default value section are valid.

After reading defaults and applying POSTs with the associated rules, the argument will have a value or be empty. The Required setting on the argument decides if an empty value is allowed.

8.2.3 File & Collect

The File & Collect tab is used to control loading of relating files, collection and conversion options for actions that collect and transfer files.

SETUP	POST	DESCRIPTION
Files are required for service	-	If set to yes, it means that the service will not run if there are no files (paths or fileids) posted
Read Linked files	getLinkedFiles	Collect files linked to main file. (InDesign links in Venture)
- Allow POST	-	Set to Yes to allow this setting to be Posted as part of the service. Empty POST, if accepted, and "0" equals No, 1 equals "Yes".
Read files recursively	readRecursive	Get files from folders instead of using folders that are posted. Any folder that is posted will be searched for files and files processed instead of folder.
- Allow POST	-	Set to Yes to allow this setting to be Posted as part of the service. Empty POST, if accepted, and "0" equals No, 1 equals "Yes".
Select conversionlist	-	Conversion is based on selection of options from a conversionlist. Select a conversion list to base conversions on.
Select conversion option	conversion	Conversion to use is selected from the options in the list that was selected above. Select the option to use as default or to use. See below
- Allow POST		Set to Yes to allow this setting to be Posted as part of the service. The POST needs to match one of the names in the conversion options list. The value selected in the list will be used as default if there is no POST.

8.2.3 Notifications & Reports

The action tab is used to control the action associated to the service. The options will reflect what action is being used.

SETUP	POST	DESCRIPTION
Administrator mail	adminmail	Administrator email used by some actions
- Allow POST	-	Set to No to use the setting as it is. Set to Yes to allow this setting to be Posted as part of the service. Decide whether to use the default value if POST is empty or only if missing.
Reply-to mail	replyto	Reply-to email address used by some actions
- Allow POST	-	Set to No to use the setting as it is. Set to Yes to allow this setting to be Posted as part of the service. Decide whether to use the default value if POST is empty or only if missing.

SETUP	POST	DESCRIPTION
Notification templates	notiftempl	Email notifications layout to use. See section on email formats for more information.
- Allow POST	-	Set to No to use the setting as it is. Set to Yes to allow this setting to be Posted as part of the service. Decide whether to use the default value if POST is empty or only if missing.
Report template Report output path Receipt template Receipt filename	-	Same settings as on the corresponding Plugin configuration. See Reporting section 5.5

8.3 InterAct WebService actions

Following actions are available for InterAct WebServices: assetLink, makeDirs, projectMaker, sendByFtp, setKeyWords.

8.3.1 WebService: assetLink

This action uses the InterAct action Asset Link to collect files, make a zipped archive and send a link via an email for downloading the archive.

It is for all purposes equivalent to the Asset Link plugin. For more information see 4.4.1.

8.3.2 WebService: makeDirs

This action creates new directories on the server.

Each directory can have its permission mode, owner and group set by the service. If not given, they will default to the values of the first existing directory in the requested directory path.

It is also possible to set the desktop folder color (red, orange, yellow, green, blue, purple or grey) and to attach metadata to the created path. Metadata is supplied in name/value pairs where the name is the keyword name and the value is the actual value to set. Several pairs can be specified separated by “;” (semicolon).

Several sets of paths with associated permission, owner, group, desktop folder color and keywords can be set in the same POST.

8.3.3 WebService: projectMaker

This action uses the InterAct action Project Maker to create a new Project structure on the server using a Project structure template.

It is mostly equivalent to the Project Maker plugin. For more information see 4.5.1.

In addition to the functionality from the Project Maker plugin, the webservice can also create the new Project on a specific full path. This makes it possible to post a full path where to make the new Project instead of constructing the path.

8.3.4 WebService: sendByFTP

This action uses the InterAct action Send FTP to collect files, make a zipped archive and transfer the archive to an FTP site.

It is for all purposes equivalent to the Send FTP plugin. For more information see 4.4.3.

8.3.5 WebService: setKeywords

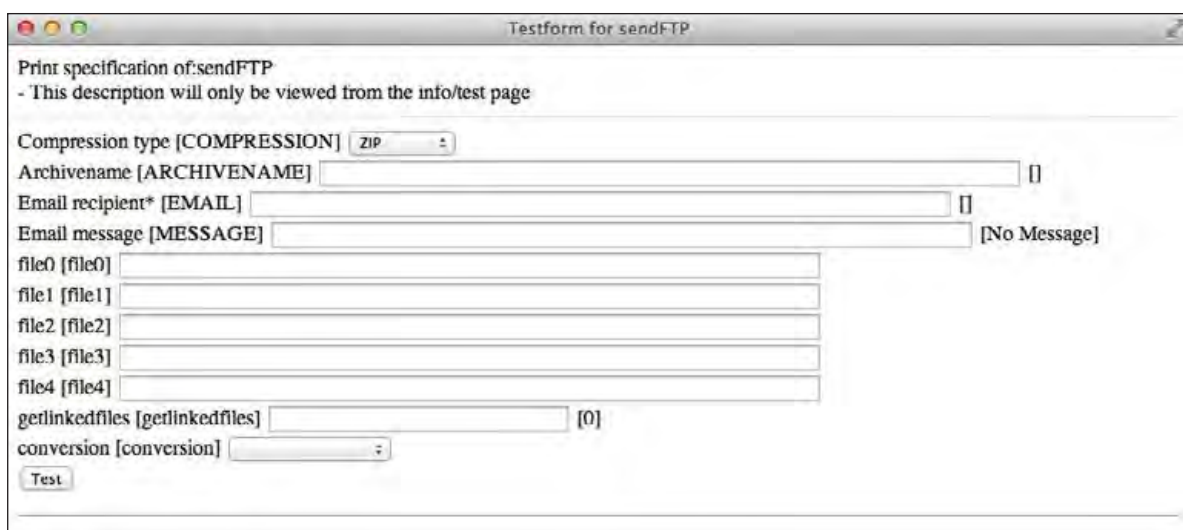
This action applies keywords to files and folders on the server.

Metadata is given in name/value pairs where the name is the keyword name and the value is the actual value to set. Several pairs can be specified separated by “;” (semicolon). It is possible to specify several paths in the same POST. Each path can have its own list of keywords or all can use the same set.

8.4 Testing an InterAct WebService

A webservice setup can be tested from the **View/Test** button in the main list or on the configuration page for the service. The button will only show for services that are enabled.

The View/Test function will open a window that show a basic webform that reflects the settings that has been applied to the service. Only arguments that are enabled for POST show up and the name of the argument is listed as well as any default value that will be supplied.



Empty testform based on sendByFTP service where serverdata is hardcoded into the config. The form show each argument with its Title, POSTname, input or select and default value. If files are required for the action, there will be a list of five file inputs for testing.

The button labeled **Test** can be used to run the service. Another window will be opened when the button is clicked and it will display the response from the webservice:



8.4.1 WebService Example: sendByFTP

Following is a full example showing the setup of a service, testing, getting the response and checking the status. It also show the result of the service.

Tab 1 of the config (Base & Access) is used for some basic information, enabling the service and

deciding what users that should have access to the service. It also specifies the basic server URL where to request the status of an action that has been queued. It is also possible to restrict the paths on where the action should be able to operate (in this case collect the files).

» Modify "sendFTP"

» **Base & Access** Action setup File & Collect Notifications & Reports

Comment: send assets via ftp

Description: This description will only be viewed from the info/test page

Enable service: Yes

Debug: No

Serverurl: http://192.168.99.90

Restrict to WebNative users: demo,john.doe,serviceuser,nativeadmin

Restrict to WebNative groups:

Restrict to these server paths: Volumes Select Volume Add

Dismiss View/Test Save

Tab 2 of the config (Action setup) is used to configure the action itself. We decide to hardcode the file transmission settings and insert some defaults for compression and texts.

» Modify "sendFTP"

Base & Access » **Action setup** File & Collect Notifications & Reports

Argument	POST name	Default value	Read POST	Required
FTP host	FTPHOST	ftp://ftp.inpress.se	No	No
FTP username	FTPUSER	XXXX	No	No
Password	FTPPASS	YYYY	No	No
FTP path	FTPPATH		No	No
Compression type	COMPRESSION	ZIP	Yes, select from list	No
Archivename	ARCHIVENAME		Yes, discard empty POST	No
Email recipient	EMAIL		Yes, discard empty POST	Yes
Email subject	SUBJECT	File delivery	No	No
Email message	MESSAGE	No Message	Yes, discard empty POST	No
Use Active FTP	ACTIVEFTP		No	No

This action will collect assets, make a ziparchive and send the archive through ftp/sftp

Dismiss View/Test Save

Tab 3 of the config (File & Collect) is used to configure file related functions like Read linked files and conversions. We allow POST for Read Linked files with the default of "No". We also apply a conversionlist which will enable conversions from that list. Only POSTs that match one of the conversionlist options will be accepted.

» Modify "sendFTP"

Base & Access Action setup » **File & Collect** Notifications & Reports

Files are required for service Yes

Read Linked files No Allow POST [getLinkedFiles] : Yes, discard empty POST

Read files recursively No Allow POST [readRecursive] : No

Select conversionlist default.eng

Select conversion option Allow POST [conversion] : Yes

Dismiss View/Test Save

Tab 4 of the config (Notifications & Reports) is used to configure notification and reporting options similar to those of the InterAct plugins. How they are used depend on the Action.

» Modify "sendFTP"

Base & Access Action setup File & Collect » **Notifications & Reports**

Administrator mail serviceadmin@inpress.se Allow POST [adminmail] : No

Reply-to mail info@inpress.se Allow POST [replyto] : No

Notification templates Allow POST [notiftempl] : No

Report template

Report output path

Receipt template

Receipt filename

Dismiss View/Test Save

The test form is loaded using the View/Test button and some data is typed into the fields. We specify two files with their full paths and also enable the Get linked files option (which will get files that are linked to the InDesign document using the Xinet tools). The test form is submitted and we receive an XML respons.

Testfor 192.168.99.90/webnative/Intwebservice?sendFTP

Print specification of: sendFTP
- This description will only be viewed from the info/test page

Compression type [COMPRESSION] ZIP

Archivename [ARCHIVENAME] Myfiles

Email recipient* [EMAIL] demo@inpress.se

Email message [MESSAGE] These are your files

file0 [file0] /FP_VOLS/Images/Images-1/0004564.jpg

file1 [file1] /FP_VOLS/Jobs/Linked Document.indd

file2 [file2]

file3 [file3]

file4 [file4]

getlinkedfiles [getlinkedfiles] 1 [0]

conversion [conversion]

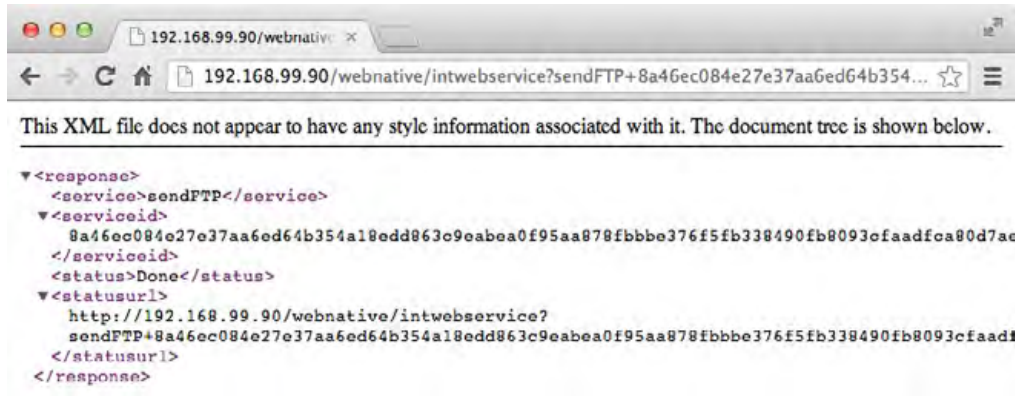
Test

This XML file does not appear to have any style information associated with it.
The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8" ?>
<response>
  <service>sendFTP</service>
  <serviceid>
    8a46ec084e27e37aa6ed64b354a18edd863c9eabea0f95aa878fbbbe376f1
  </serviceid>
  <status>Queued</status>
  <statusurl>
    http://192.168.99.90/webnative/intwebservice?
    sendFTP+8a46ec084e27e37aa6ed64b354a18edd863c9eabea0f95aa878fbbbe376f1
  </statusurl>
</response>
```

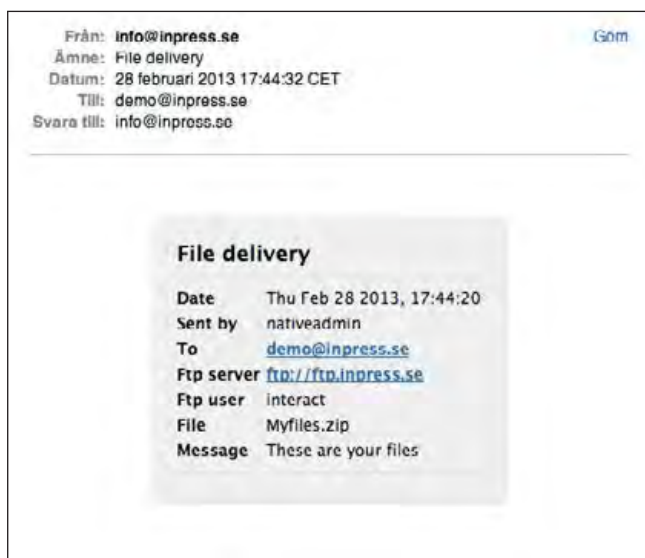
The response from the server tells us that the order is queued and returns the serviceid and the statusurl where to check the status. We wait a few seconds and then use the statusurl link in the respons to check the status of the order we placed.

The respons now tell us that the request is Done.

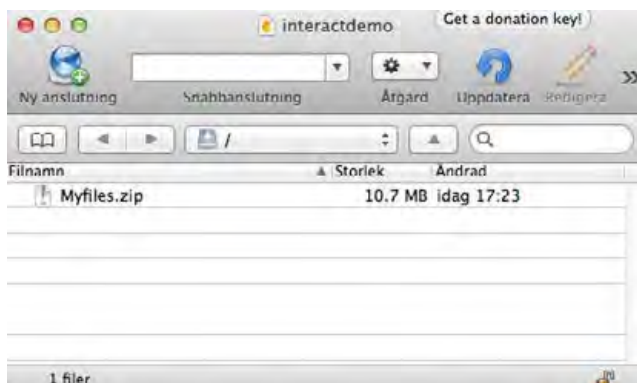


The service has now collected the files, transmitted them to the ftpserver according to the setup and sent an email to `demo@inpress.se`:

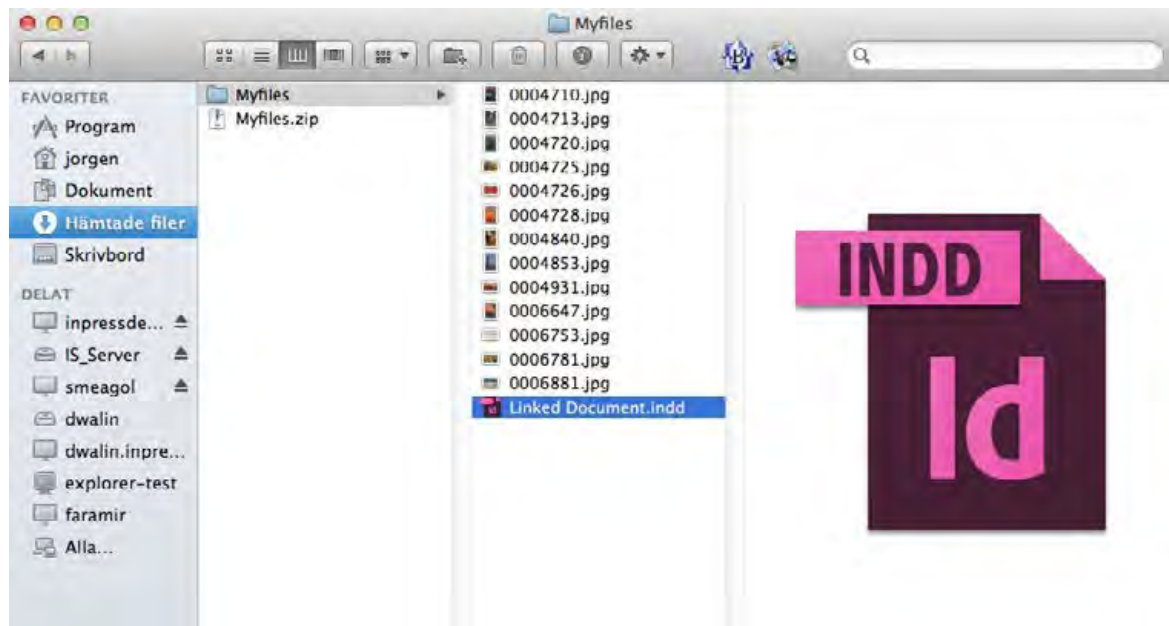
Email:



FTP site:



The zipped file after being downloaded and unpacked. Single jpg file and the InDesign file with its linked files are in a folder.



8.5 InterAct WebService response format

The response from InterAct WebServices is in XML format.

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<response>
  <service>Name of service</service>
  <serviceid>Id assigned to the service</serviceid>
  <status>Status</status>
  <errorcode>Error code</errorcode>
  <errormess>Error message</errormess>
  <statusurl>URL to get status of service</statusurl>
</response>
```

Name of service is the name given to the service in the admin

Id assigned is the encoded ID of the order that was posted

Status is the current status of the order: Queued, Done, Running or Error

Statusurl is a URL that can be used to check the status on the order. This is particularly useful if the order was Queued initially and the system wants to check that it has been executed.

Error code and **message** will only be present when the status is Error.

Example response from posting an order that is queued:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<response>
  <service>sendFTP</service>
  <serviceid>8a46ec084e27e37aa6ed64b354a18edd863c9eabea0....</serviceid>
  <status>Queued</status>
  <statusurl>http://192.168.99.90/webnative/intwebservice?sendFTP+8a46e...</statusurl>
</response>
```

The status will tell the system that Posted if the service queued the order, and then the statusurl can be used to check on the order status by running a GET on the statusurl:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<response>
  <service>sendFTP</service>
  <serviceid>8a46ec084e27e37aa6ed64b354a18edd863c9eabea0....</serviceid>
  <status>Done</status>
  <statusurl>http://192.168.99.90/webnative/intwebservice?sendFTP+8a46e...</statusurl>
</response>
```

A MIGRATING INTERACT

Migrating InterAct between servers are usually performed alongside a migration of the Xinet WebNative Suite.

The normal practise is to copy all the installation directories below using tar and then run a new installation on top of the moved files to make sure all the binaries are replaced with the most current versions for the right platform.

- /usr/tracker - base directory
- /var/adm/webnative - InterAct config files distributed into user/group directories

A good suggestion is to clean out the tmp directory before moving. Stop the Interact daemon than delete all files in the tmp directory.

run

```
# /usr/tracker/bin/tracker_ctrl stop
```

to stop the daemon

Clean out /usr/tracker/tmp

Possible issues:

Permissions on logfiles are wrong or belong to the wrong user.

The userid of the webserver may be different between platforms causing a mismatch between the ownership of logfiles. Ownership or permissions may need to be updated on files in the directory **/usr/tracker/logs**.

B UNIX TIME FORMAT

When using the `date()` as a part of a path or in other types of tasks, InterAct uses the standard UNIX/C type formatting of times and dates. As an example, using `date()` with the following formatter “%Y-%m-%d-%H.%M.%S”

```
date(%Y-%m-%d-%H.%M.%S)
```

Assuming that the current date is Nov 9, 2011 and the current time is 11.22.15, the output produced is

```
2011-11-09-11.22.15
```

Below is a partial list of sequences that can be used

- %a Locale's abbreviated weekday name
- %A Locale's full weekday name
- %b Locale's abbreviated month name
- %B Locale's full month name
- %d Day of month [1,31]; single digits are preceded by 0
- %D Date as %m/%d/%y
- %e Day of month [1,31]; single digits are preceded by a space
- %h Locale's abbreviated month name
- %H Hour (24-hour clock) [0,23]; single digits are preceded by 0
- %I Hour (12-hour clock) [1,12]; single digits are preceded by 0
- %j Day number of year [1,366]; single digits are preceded by 0
- %k Hour (24-hour clock) [0,23]; single digits are preceded by a blank
- %l Hour (12-hour clock) [1,12]; single digits are preceded by a blank
- %m Month number [1,12]; single digits are preceded by 0
- %M Minute [00,59]; leading 0 is permitted but not required
- %p Locale's equivalent of either a.m. or p.m
- %r Appropriate time representation in 12-hour clock format with %p
- %R Time as %H:%M
- %S Seconds [00,61]; the range of values is [00,61] rather than [00,59] to allow for the occasional leap second and even more occasional double leap second
- %T Time as %H:%M:%S
- %u Weekday as a decimal number [1,7], with 1 representing Monday. See NOTES below
- %U Week number of year as a decimal number [00,53], with Sunday as the first day of week 1
- %V The ISO 8601 week number as a decimal number [01,53]. In the ISO 8601 week-based system, weeks begin on a Monday and week 1 of the year is the week that includes both January 4th and the first Thursday of the year. If the first Monday of January is the 2nd, 3rd, or 4th, the preceding days are part of the last week of the preceding year. See NOTES below
- %w Weekday as a decimal number [0,6], with 0 representing Sunday
- %W Week number of year as a decimal number [00,53], with Monday as the first day of week 1
- %x Locale's appropriate date representation
- %X Locale's appropriate time representation
- %y Year within century [00,99]
- %Y Year, including the century (for example 1993)

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