

**ADOBE® CREATIVE SUITE®
TASK LIST EXTENSION FOR
INTEGRATED CONTENT REVIEW**

USER'S GUIDE

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Adobe® Creative Suite® Task List Extension for Integrated Content Review: User's Guide

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Using ICR Task List

Adobe® Creative Suite® Task List Extension for Integrated Content Review (called ICR Task List in this document) is an extension for Adobe Photoshop®, Adobe Illustrator®, and Adobe InDesign® that allows the creative professional to manage and work with design tasks that are assigned from Integrated Content Review (ICR) 10.0, part of the Adobe Customer Experience Solutions. The extension is compatible with CS5 and CS5.5.

The ICR Task List extension can be installed and loaded into your Creative Suite applications, and configured for your enterprise along with the ICR solution; it is installed separately. After it has been installed and configured, ICR Task List connects directly into and interacts with ICR. It receives tasks from ICR, displays information about those tasks to the creative professional from a panel within the Creative Suite application, and responds back to ICR when tasks are completed. Tasks are associated with specific project *assets* (such as documents and images) to be uploaded into the ICR repository from the desktop.

ICR Task List is included with the ICR solution, and is available to creative professionals through the Creative Suite product they use to design assets.

- ▶ This document is addressed to the creative professional, and describes how to use Adobe® Creative Suite® Task List Extension for Integrated Content Review.
- ▶ For the IT professional, see the [ICR Task List Extension Administrator's Guide](#) for information about installing and configuring the ICR Task List extension.
- ▶ For information about installing, configuring, and using Integrated Content Review, see the [Integrated Content Review 10.0 Solution Guide](#).

About ICR Task List

A project that is managed through ICR can include assets whose content is designed in one of the Creative Suite products. If one of these assets needs modification, the project manager can assign the task of modifying that asset to you, the creative professional.

The ICR Task List panel communicates with ICR to notify you of such tasks, provide information about them, and provide access to the related assets in the ICR repository. ICR Task List allows you to manage tasks that are assigned to you, and submit new or modified assets back to the ICR repository.

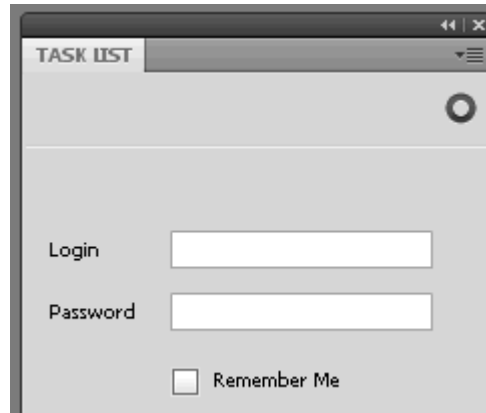
When you open ICR Task List from the Extensions menu, a panel appears in the main window of the Creative Suite product that allows you to:

- ▶ Receive notification of task assignments from ICR, and other status changes that affect you.
- ▶ Track tasks that are assigned to you within the application you use.
- ▶ View task requirements and due dates.
- ▶ Obtain related assets from the ICR repository.
- ▶ Notify ICR when a task is completed, and upload new or modified assets. An InDesign asset can be uploaded as a file or as an InDesign package.

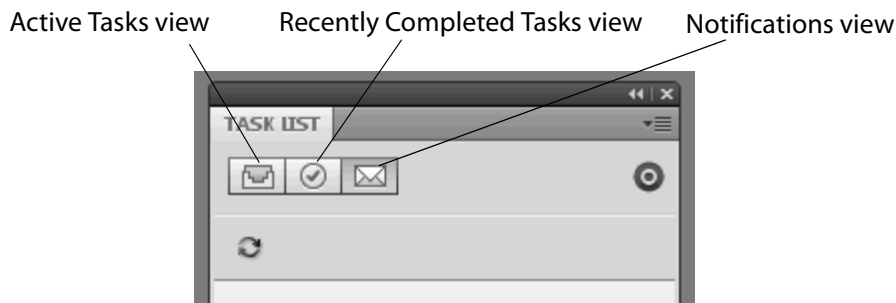
As part of submitting a task, ICR Task List automatically generates and uploads a PDF version of the asset for review. If the review results in changes that you need to make to your asset, the commented PDF is returned to you as part of a new task.

Getting started

To open the ICR Task List panel in Photoshop, Illustrator, or InDesign, choose **Window > Extensions > Task List**. The first time you open it in a session, you must sign in to the Experience server with your ICR user name and password. You can choose for the extension to remember your login information for future sessions.



When you have signed in, a set of icons at the top of the panel allows you to switch between three views:



The other icons that remain visible in all views allow you to refresh the current view, and sign out of ICR Task List:



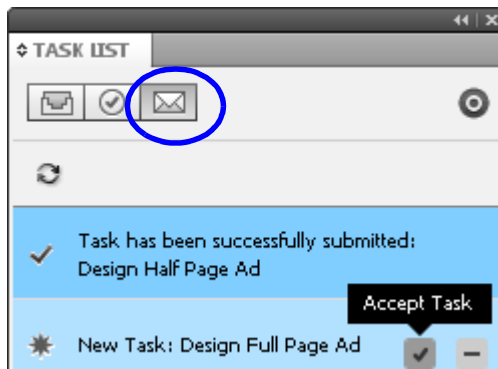
The task list refreshes itself periodically by checking with the Experience server, but you can use the manual-refresh button to make sure the content is current at any time.

(In order to refresh the list automatically, ICR Task List has to poll the server, which can affect performance. For this reason, your enterprise might have disabled automatic refresh; if so, you must always use the button to refresh the list. For more information, see the *ICR Task List Extension Administrator's Guide*.)

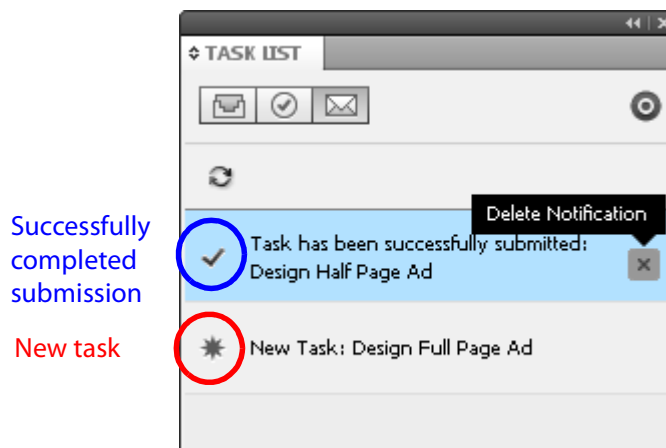
Notifications view

The Notifications list view is the default view that appears when you start the extension. This view shows you messages from ICR, including new task assignments and notification of changes in task status. These notifications are also sent to your e-mail.

- ▶ When you move the cursor to the right side of a new task assignment notification, buttons allow you to accept or decline it.



- ▶ When you move the cursor to the right side of a status notification, an X button appears that you can click to remove it from this list.



- ▶ Icons on the left mark particular kinds of notifications:
 - ▷ An asterisk marks a new task that has been assigned to you.
 - ▷ A checkmark indicates notification of successful completion for a task you submitted.
 - ▷ An warning icon (an exclamation mark in a triangle) marks a task for which an attempted submission was unsuccessful.
 - ▷ The warning icon also indicates an expired task (that is, one whose due date has passed), and a task that has been withdrawn from ICR.

Notification details

Status notifications include all of the information available about the status change. New task notifications show a brief description, and allow you to view further details of the task.

Click a new task notification in the list to open it in the Notification details view. This view gives you another opportunity to accept or decline a task assignment, and also gives you access to any supporting documents and web pages; see [“Working with tasks” on page 9](#).



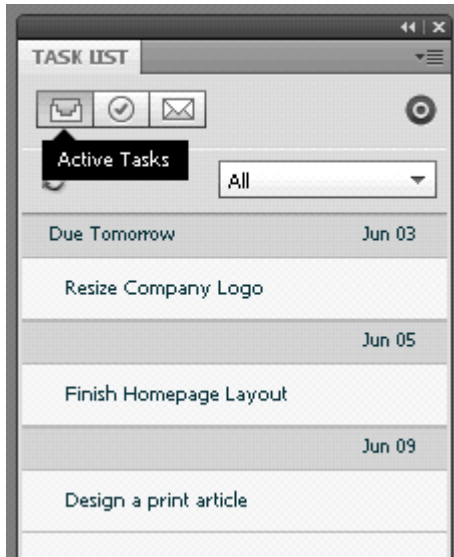
Once you have accepted or declined a new task notification, or deleted a status notification, that notification disappears from the Notifications list view. If you are in the Notification details view, you are automatically returned to the Notifications list view.

- ▶ When you decline a task, it disappears entirely from your ICR Task List panel; you do not see it again unless it is reassigned to you.
- ▶ When you accept a task, it becomes an *active task*, and appears in the Active Tasks view.

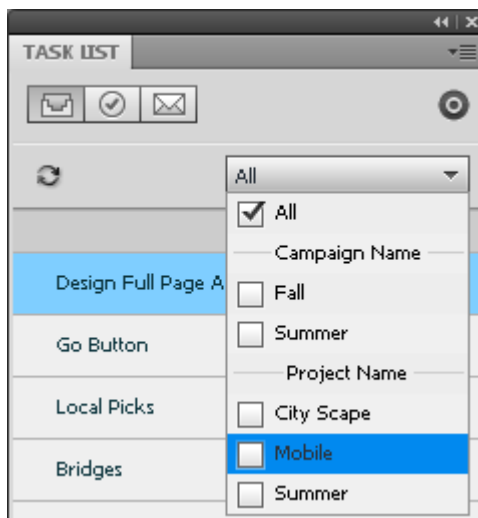
Active Tasks view

When you have accepted a task that is assigned to you, it becomes an *active task*. The Active Tasks list view shows you a list of all active tasks, organized by due date with the nearest dates at the top.

Tasks that are past due are listed in a separate Past Due section; you receive a notification when a task passes its due date.



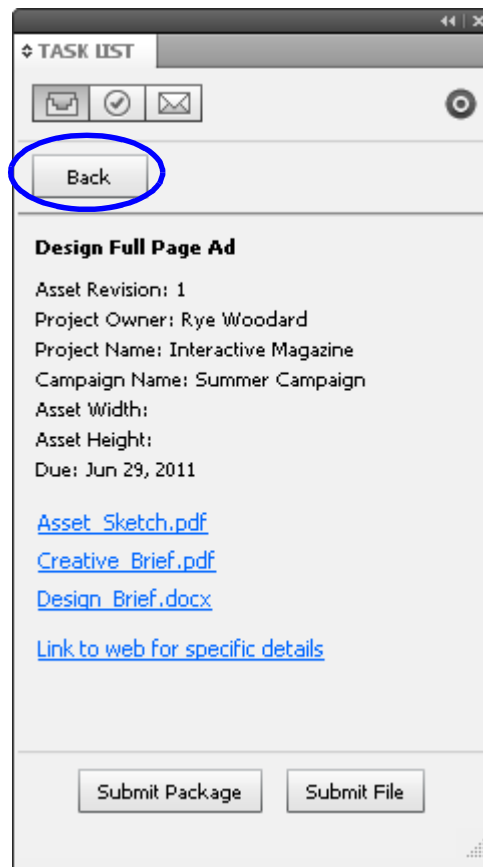
At the top of the list, a drop-down menu allows you to filter the list of tasks by criteria defined by your project managers. For example, you can choose to see only those tasks associated with a particular project or campaign.



Each task appears in this list as a short description. Click a task in the list to display the details of that task.

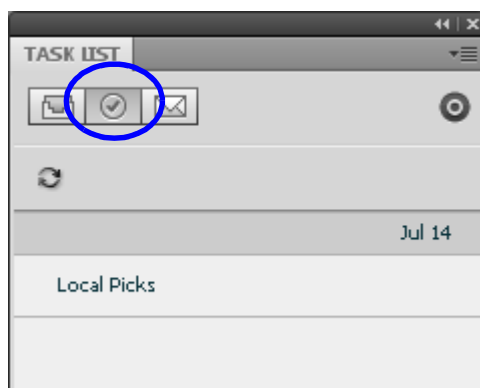
- ▶ The Active Tasks details view, like the Notification details view, gives you access to supporting documents and web pages; see ["Working with tasks" on page 9](#).
- ▶ Because you have already accepted the task, the page now gives you the opportunity to submit it when it is complete. If you generate a new document in the course of completing a task, you can upload it to the ICR repository when you submit the completed task. see ["Submitting completed tasks for review" on page 9](#).

Use the Back button to return to the Active Tasks list view



Recently Completed Tasks view

The Recently Completed Tasks view provides a history of tasks that have been assigned to you, and successfully completed and submitted. Completed tasks are organized by completion date, starting with the most recently submitted.



Working with tasks

The Task details view allows you to obtain documents and assets that are already associated with the task, and submit your work, adding a new document or asset that you have created or modified.



Use the links to obtain documents that describe the task more fully, and any existing assets related to the task.

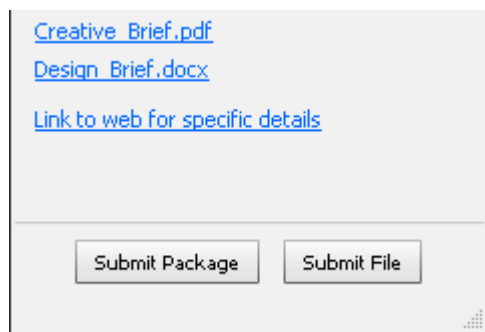
Download assets from ICR repository

Link to specific task details in ICR, such as an asset that needs modification

Submitting completed tasks for review

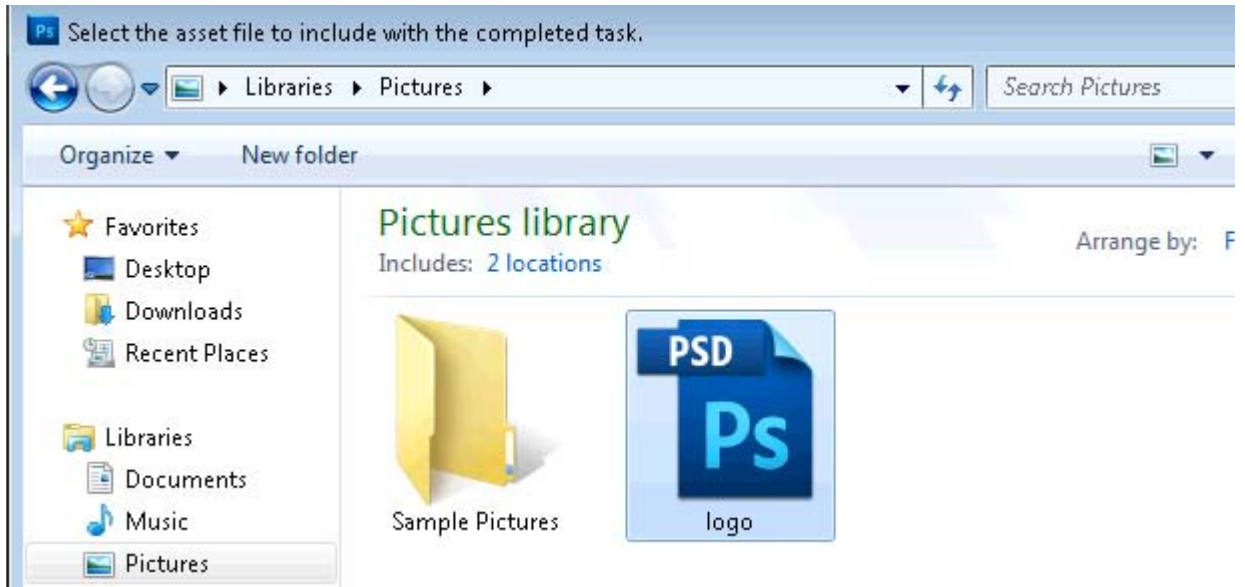
When you have completed work on a task, you submit it for review, along with the document or asset that you have generated in connection with that task.

1. Select the finished task in the Active Tasks list and click to display the Task details view.
2. Click Submit. If you are working in InDesign, you can choose to submit either a file or a package.

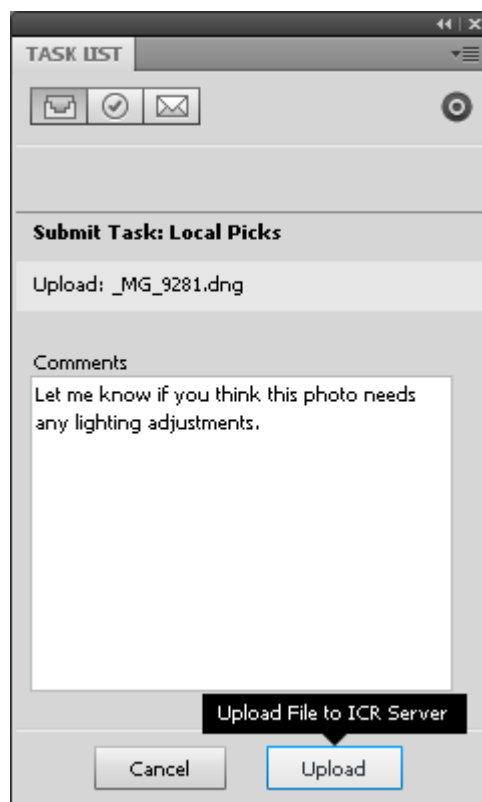


3. In the platform-specific file browser, select the file to upload to the Experience server as part of the task, and click **Open**. For InDesign, you can select a file or package.

For a complete list of file types that you can submit, see [“Asset file types and metadata” on page 12](#).



4. If the file or package you select is open in the application and has not been saved, you are prompted to save it.
5. Add submission comments to describe the task status; these comments are associated with the asset in ICR.



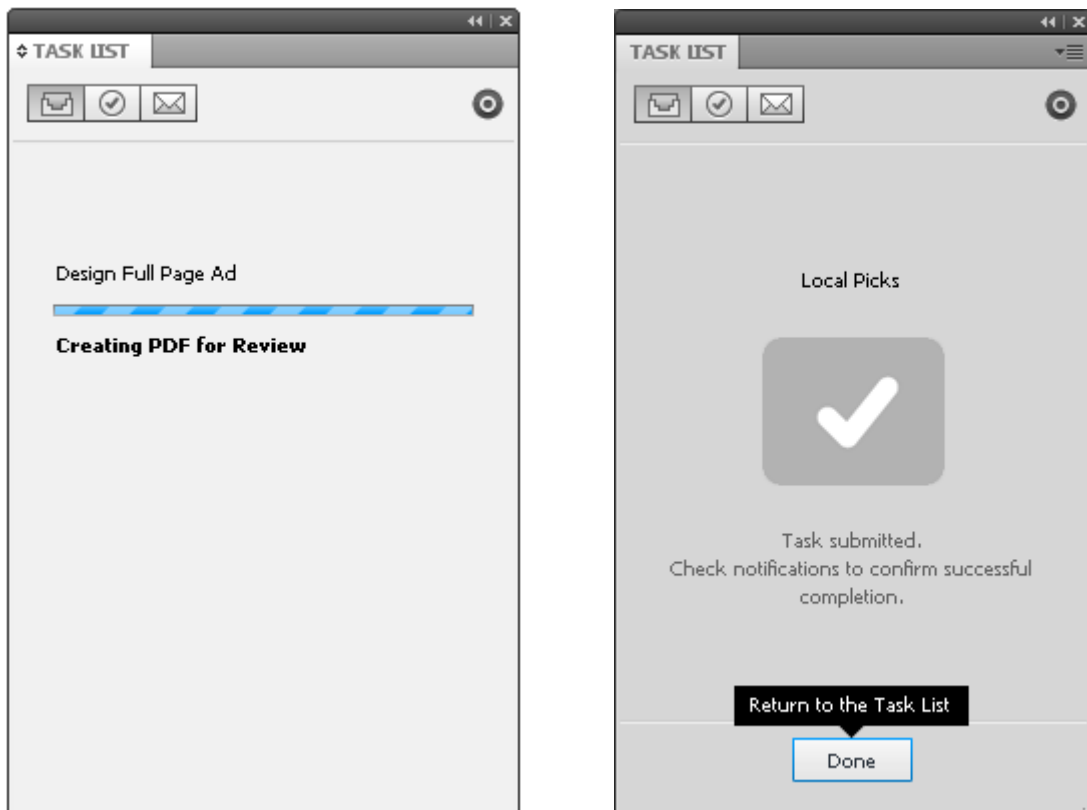
6. Click **Upload**.

Results of submission

When you submit a task, ICR Task List does the following:

- ▶ Automatically generates a PDF of your asset for review.
- ▶ Adds metadata to your asset in the XMP format, if the file format supports XMP. See [“Asset file types and metadata” on page 12](#).
- ▶ Uploads your new or modified asset to the ICR repository, along with the generated PDF.
- ▶ Changes the task status to completed.

During the upload process, you see a progress bar, and can click **Cancel** to abort the submission. If you do so, the task returns to its previous status and nothing is submitted to the ICR repository. The panel returns to the Task details view.



When the upload is complete, click **Done** to return to the Active Tasks view. The task you have just submitted moves from the Active Tasks to the Completed Tasks list (see [“Recently Completed Tasks view” on page 8](#)).

You receive a notification confirming the success or failure of the submission. The notification for a task that was unsuccessfully submitted is marked with the warning icon.

Receiving review comments

The PDF of your new or modified asset can become part of review tasks assigned to other members of your team. They can submit the commented PDF back to ICR.

When the rest of your team has finished reviewing material you have submitted, you are assigned a new task of incorporating the review. The commented PDF is a document associated with the new task.

Asset file types and metadata

You can submit any file type that can be opened by your host application, with these exceptions:

- ▶ InDesign Book files (INDB) cannot be submitted as assets.
- ▶ Illustrator Template files (AIT) cannot be submitted as assets.

For file types that support the XMP metadata standard, ICR Task List automatically adds metadata to describe various features of the asset, such as the project and campaign with which it is associated.

NOTE: A task submission can fail if ICR Task List cannot add metadata. This typically occurs because the asset you have added or modified does not have write permission. Make sure your files are writable before submitting them.

These are the file types that can be submitted as assets, for which ICR Task List automatically adds metadata:

Host application	File types that support XMP
InDesign	INDD INDT
Illustrator	AI PDF DWG PS, EPS JPG, JPEG JPE, JPF, JPX, JP2, J2K, J2C PSD TIF, TIFF
Photoshop	PSD PS, EPS AI JPG, JPEG PE, JPF, JPX, JP2, J2K, J2C PNG TIF, TIFF

You cannot configure the ICR Task List metadata, but you can examine it in the application in which the extension is loaded.

1. In Photoshop, Illustrator, or InDesign, choose **File->File Info**.
2. Select the "Advanced" or "Raw data" panel.

3. Look for the namespace `http://ns.adobe.com/livecycle/icr/1.0/`.

Similarly, you can examine the metadata that is added to the PDF which ICR Task List generates for review:

1. In Acrobat Pro, choose **File->Properties**.
2. Select the "Description" panel and click **Advanced**.
3. Look for the namespace `http://ns.adobe.com/livecycle/icr/1.0/`.