BEA AquaLogic® Interaction Publisher

Administrator Guide

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CHAPTER 1

Welcome

This book is written for administrative users who are responsible for managing portal content and branding through AquaLogic Interaction Publisher.

This book describes how to perform initial and ongoing Publisher administrative tasks. When you first install Publisher, you can use this book to as a guide to performing the following set-up tasks:

1. Set up the Publisher folder hierarchy.
2. Assign portal users and groups to Publisher security roles.
3. Set up and enable workflow.
4. Configure web server publishing locations.
5. Create and configure published content portlets—including their building blocks: content items, data entry templates, and presentation templates.
6. Create and configure published content portlet templates.
7. Set up and enable WebDAV (Web-based Distributed Authoring and Versioning) features.
8. Migrate Publisher objects between databases.

In addition, you can use this book as a guide to performing the following end-user tasks:

1. Create published content.
2. Handle content items in workflow.

When you have completed your initial Publisher installation, you can use this guide as a reference for tasks that you repeat or tasks that do not apply during initial installation but might apply later when you extend your base Publisher installation.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
• File names • Folder names • Screen elements	**bold**	• Upload **Procedures.doc** to the portal. • The log files are stored in the **logs** folder. • To save your changes, click **Apply Changes**.
• Text you enter	`computer`	Type `Marketing` as the name of your community.
• Variables you enter	`<computer>`	Enter the base URL for the Remote Server. For example, `http://<my_computer>/`.
• New terms • Emphasis • Object example names	*italic*	• *Portlets* are Web tools embedded in your portal. • The URI *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

BEA Documentation and Resources

The tables in this section list other documentation and resources provided by BEA.

Table 1-2 Documentation

Resource	Description
Installation Worksheet	This worksheet helps you to gather and record prerequisite information necessary for installing AquaLogic Interaction Publisher. It is available on edocs.bea.com/alui/publisher/docs64.
InstallationGuide	This book is written for system administrators responsible for installing or upgrading AquaLogic Interaction Publisher. It is available on edocs.bea.com/alui/publisher/docs64.

Table 1-2 Documentation

Resource	Description
Release Notes	These files are written for Publisher administrators. They include information about new features and known issues in the release. They are available on edocs.bea.com/alui/publisher/docs64 and on any physical media provided for delivering the application.
Deployment Guide	This document is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment. It is available on edocs.bea.com/alui/deployment/index.html.
Online Help	The online help is written for all levels of Publisher users. It describes the user interface for Publisher and gives detailed instructions for completing tasks in Publisher. To access online help, click the help icon.

Table 1-3 Other BEA Resources

Resource	Description
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.

Table 1-3 Other BEA Resources

Resource	Description
AquaLogic User Interaction Support Center	The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities: **Technical Support Center** Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes. **User Group** Visit the User Group section to collaborate with peers and view upcoming meetings. **Product Center** Download products, read Release Notes, access recent product documentation, and view interoperability information. **Developer Center** Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups. **Education Services** Find information about available training courses, purchase training credits, and register for upcoming classes. If you do not see the Support Center when you log in to http://one.bea.com/support, contact ALUIsupport@bea.com for the appropriate access privileges.
Technical Support	If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs. E-mail: ALUIsupport@bea.com Phone Numbers: U.S.A. +1 866.262.PLUM (7586) or +1 415.263.1696 Europe +44 1494 559127 Australia/NZ +61 2.9923.4030 Asia Pacific +61 2.9931.7822 Singapore +1 800.1811.202

CHAPTER 2

Introduction to Publisher

This chapter provides an overview of Publisher and discusses:

- Publisher Features
- Publisher Users and Roles
- Publisher Architecture

You should understand the concepts discussed in this chapter *before* you start using Publisher. Each concept is described in more detail in later chapters.

About Publisher

As the web publishing system for AquaLogic User Interaction, Publisher provides the foundation services required to deploy content-driven applications, like a customer support knowledge base or sales support center, where business people can create and manage web content without HTML skills. Publisher works cohesively with the AquaLogic Interaction (ALI) portal components to enable business users to enjoy a simple web publishing experience and administrators to take advantage of fully integrated administration, search, security and user profile management.

Integrated with portal user management, document management, and search, Publisher is especially well-suited for customers who have many content contributors and want to standardize on a set of published content portlets for handling all common types of portal content, including articles, customer profiles, employee reports, news stories, and so forth.

Publisher Features

This section discusses:

- Overview of content creation and publishing using Publisher.
- Publisher features and editors.
- Publisher intrinsic portlets.

Overview of Content Creation and Publishing

Publisher enables users to create, store, and publish content through portlets in the ALI portal, the portal Knowledge Directory, and external web sites.

Although there are many ways of creating and publishing content using Publisher, a typical content contributor submitting an article to a community page in the portal might use the following procedure:

1. Access the Community Knowledge Base portlet on the community page in the ALI portal.
2. Open the "How to Article" folder in the portlet and click the Create button to open the *Content Item Editor.*
3. In the Content Item Editor, enter *property* values in a series of edit boxes: Name, Title, Summary, More Information.
4. *Preview* the article as it will look when published to the portal.
5. Save the article. It now appears in the Community Knowledge Base *portlet folder* in the *Publisher Explorer,* where authorized Publisher users can view it in the context of the Publisher folder hierarchy, and where users can perform almost any Publisher function on the article, depending on their security role.
6. Submit the article to *workflow.*
    a. In the first workflow step, an editor gives the article an edit and approves it for forwarding to the next workflow step.
    b. In the next workflow step, the community manager approves it and publishes it to the web server and the portal Knowledge Directory.
7. The article now appears in the How to Article folder of the Community Knowledge Base portlet on the community page, available for any portal user with access to the portlet to

view—and for users with the proper *Publisher security role* to check out, edit, and republish. It also appears in the portal Knowledge Directory and is indexed in the portal search index.

Publisher Features and Editors

In following this submission and publication process, the contributor is using, directly or indirectly, most of the features provided by Publisher:

Table 2-1 Publisher Features

Feature	Description
Published content portlets	Published content portlets, such as the Community Knowledge Base portlet in the example, present content through the portal and can enable users to submit and edit content. See Chapter 6, "Creating Published Content Portlets."
Published content portlet templates	Published content portlet templates enable a user without HTML skills, like a community manager, to create published content portlets using the *Configure Portlet Wizard*. Publisher provides six sample portlet templates that you can use as-is or configure to meet your organization's needs using the *Configure Portlet Template Wizard*. You can also create your own portlet templates from scratch using this wizard. See Chapter 6, "Creating Published Content Portlets" and Chapter 11, "Configuring Custom Portlet Templates."
Content items	Content items are the base objects that you manage through Publisher. A content item can be a set of values that you enter through *Content Item Editor* or an uploaded document or image file. Content Item Editor is the interface for creating and editing content items. Content Item Editor displays a set of fields to enter data into, much like filling out a form. You can use Content Item Editor to *preview* a content item as it will appear when published to the portal or web, submit a content item to workflow, view and open previous *versions* of a content item (if you have permission), and publish it. See Chapter 7, "Creating and Editing Content Items."
Data entry templates	Content items that you create using the Content Item Editor are built on *data entry templates*, which define the *properties* available for creating a content item. When you create or edit a content item from a data entry template, these properties appear in the Content Item Editor as editable fields. You create and edit data entry templates using the *Data Entry Template Editor*. See Chapter 9, "Creating Data Entry Templates."

Table 2-1 Publisher Features

Feature	Description
Presentation templates	Data entry templates are always associated with a *presentation template;* when you publish a content item to the web server or preview it on the preview site, the presentation template determines its appearance and format. You can create and edit presentation templates using the *Presentation Template Editor*. It takes some HTML skill to create and edit presentation templates. See Chapter 10, "Creating Presentation Templates."
Publisher Explorer	Publisher Explorer is the central interface for viewing and managing all Publisher objects, including content items, data entry templates, and presentation templates. Publisher Explorer enables administrative users to set up and manage a folder structure to organize content items and published content portlets, and to assign security *roles* to users and groups by folder. Typically, the folders in Publisher Explorer reflect the organization and ownership of portal communities, such that community managers and content owners are enabled to create and publish information within their scope of responsibility. Publisher Explorer allows as wide a spectrum of users as you like to view and search it. Depending on your Publisher role, you can use Publisher Explorer to perform almost any Publisher function, including creating and editing content items, data entry templates, and presentation templates, as well as publishing content items. See Chapter 3, "Using Publisher Explorer" and Chapter 4, "Setting up and Securing the Publisher Folder Structure."
Workflow	Workflow enables your organization to manage the review, approval, and publishing of content through structured and repeatable processes. Administrative users define workflows using the *Workflow Editor*. A workflow consists of an ordered list of *workflow activities*, each of them assigned to a user or group of users. Once a content contributor submits a content item to workflow, it is passed onto an assignee for review and approval, and moves along from activity to activity (whether forward after approval or backward after rejection), with each assignee notified automatically, until the final assignee approves and publishes the item. In addition to automatic notification, Publisher provides portlets that enable tracking of personal workflow assignments and content items in workflow by folder. See Chapter 12, "Using Workflow."

Table 2-1 Publisher Features

Feature	Description
Publishing and expiration	Publishing places the formatted, web-ready file in a file location that can be accessed by the portal or other web server. Users with the appropriate permissions can publish a content item immediately (if it is in a publishable workflow activity or not subject to workflow), schedule a content item for future publication on a one-time or recurring basis, or set a published content item to *expire*, either immediately or at a future time. See Chapter 8, "Publishing and Expiring Content."
File content items	*File content items* are content items that you create by uploading images or documents to Publisher. You can include file content items as links or as properties of other content items. You can manage and publish file content items without having to use the Content Item Editor. Using *WebDAV (Web-based Distributed Authoring and Versioning)* to map a Microsoft Windows network folder to the Publisher folder hierarchy, you can use Microsoft Windows Explorer to: • View file content items and the Publisher folder hierarchy. • Upload and download file content items between Publisher and your local filesystem. • Open file content items for editing on your desktop. You can also use the *WebEdit* feature for Microsoft Office files that you have uploaded into a content item. WebEdit lets you open and edit the file in its native editor without leaving the Content Item Editor and without having to perform uploads and downloads. See "Uploading and Managing File Content Items" on page 7-13 and Chapter 5, "Using WebDAV."
Diagnostics	The Diagnostics pages enable users in the Administrator role to run and view the results of diagnostic tests on Publisher and Workflow, as well as to view key system properties. See the BEA AquaLogic User Interaction Knowledge Base for articles that describe this feature.

Publisher Intrinsic Portlets

In addition to the features and editors listed above, Publisher provides the following portlets that give users access to Publisher functionality from portal pages. We refer to these portlets as *instrinsic* because they are delivered with the application.

Table 2-2 Intrinsic Portlets

Portlet	Description
Publisher Administration	Enables you to access Publisher Explorer. Administrative users with the appropriate activity rights can also use it to access Workflow Administration and the Diagnostics page.
Content Submission	Generally used on community pages, this portlet enables you to quickly and easily submit content items to Publisher based on data entry templates chosen by the community manager.
Most Recently Used Content	Provides access to the content items you have viewed most recently in the Content Item Editor. It displays the item name, the data entry template, the associated portlet, the user to which the item is assigned, any current workflow activity, and whether or not the item is currently checked out.
Publisher Work List Portlet	Provides access to all of the workflow activities that are currently assigned to you. It displays the name of the item in workflow, workflow activity, the due date, and other information. It enables you to approve or reject an item; and claim, transfer, or delegate an assignment. It also enables you to view the current status of all items that you have submitted to workflow, that you have delegated to others, and that you have completed a workflow activity for.
Content Items in Workflow	Enables you to view all items in workflow in a selected Publisher folder or folders, including workflow activity, assignee, and due date.

For more information on the Publisher intrinsic portlets, see the Publisher online help.

Publisher Users and Roles

Publisher security is role-based, and the roles follow the spectrum of Publisher responsibilities, from administrators with complete access to casual readers, who can view content. Because roles are assigned by Publisher folder, users (except those in the Administrator role) may play different roles for different folders. For example, for the Marketing Community folder in Publisher, the Marketing portal community manager might have the *Folder Administrator* role, which provides

broad administrative powers, but for the Employee Relations Community folder, she might have only the *Submitter* role, which allows her to submit content but provides little content management authority. This section discusses how to map Publisher roles to typical Publisher responsibilities.

Publisher Roles

Access to content and features in Publisher is controlled through the assignment of the following roles to users and groups at the Publisher folder level:

Table 2-3 Publisher Roles

Role	Description
Reader	Enables you to view content and—if you have been assigned an item in workflow—approve or reject the item, or transfer your workflow assignment to another user.
Submitter	Enables you to create, preview, edit and submit articles to workflow, as well as approve or reject an item you have been assigned in workflow.
Contributor	Same permissions as Submitter, but also allows you to view content item notes, workflow details, workflow history and version history.
Editor	Provides the same permissions as Contributor, but also allows you to publish items to Publisher and to the portal Knowledge Directory.
Producer	Provides the same permissions as Editor, but also allows you to create and edit folders, data entry templates, selection lists, and presentation templates; preview and publish content items both individually and by folder; edit content items assigned to others; and configure folders to publish and preview.

Table 2-3 Publisher Roles

Role	Description
Folder Administrator	Provides the same permissions as Producer, but also allows you to undo other users' check-outs, manage published content portlets, and set or change workflow assignments and Publisher security on folders.
Administrator	Administrators can create, edit, copy, and delete top-level folders, delegate administrative rights at the folder level, and access Workflow Administration to set up system-wide workflow definitions. Users in the Administrators group in the portal are automatically granted the Publisher Administrator role and have access to every folder and every feature in Publisher. Publisher Administrators can assign the following activity rights to give administrative authority to other users and groups: • The *Administer Publisher* activity right gives users and groups the Administrator role in Publisher. • The *Configure Workflow* activity right gives access to all workflow administrative functions.

Publisher Personas

Publisher is designed to meet the needs of the following typical user personas. The table maps these personas to appropriate Publisher roles:

Table 2-4 Publisher Personas and Roles

Persona	Description	Roles
Reader	Uses portlets and published content for business activities.	Reader; Submitter if user occasionally submits content through portlets.
Content contributor	Subject-matter expert; uses portlets to view and submit new content; edits content; uploads images and documents; participates in workflow processes.	Submitter; Contributor if user must be able to edit. Role is usually folder-specific.

Table 2-4 Publisher Personas and Roles

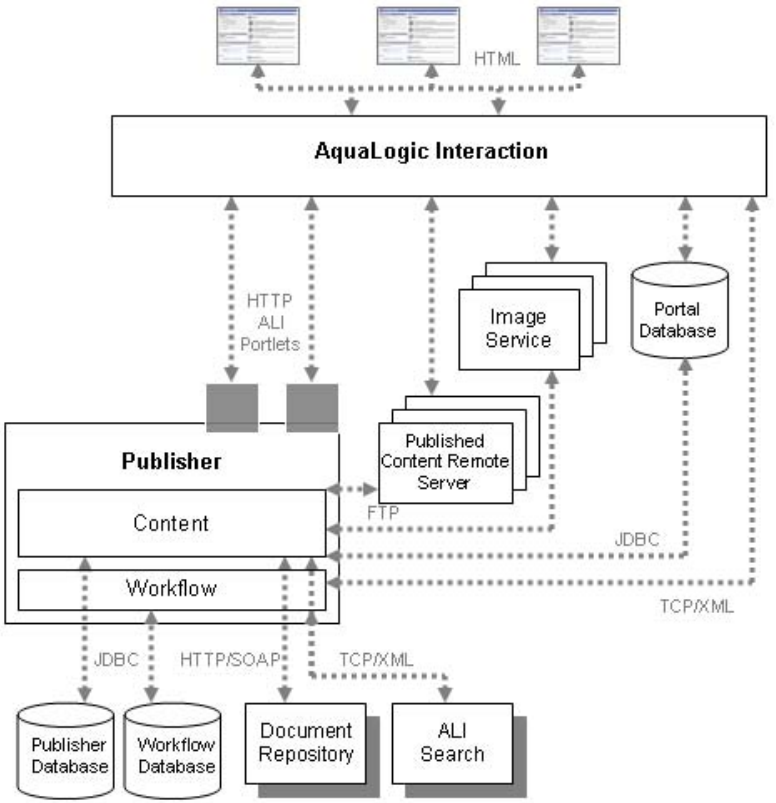
Persona	Description	Roles
Content editor	Subject-matter expert with content management or approval duties—as technical reviewer, editor, or standard-keeper. Performs the same duties as a content contributor, but with an emphasis on editing content, approving items in workflow, and publishing.	Editor. Role is usually folder-specific—especially for portlet folders or folders associated with a community or type of content.
Content manager	Power user or portal community manager; defines portlet and publishing business requirements; creates content and portlets; customizes portlets created from portlet templates for the community; oversees content publishing and expiration; invokes workflow processes for management of content approval and publishing.	Folder Administrator. Role is usually folder-specific.
Technical portlet creator	Web application developer or web designer; creates and edits data entry templates, presentation templates, and portlet templates to meet business requirements; imports content items from external sources.	Producer; Folder Administrator if user must be able to detach portlets from portlet folders, assign security, or undo other users' checkout. Role often applies to many folders, especially portlet templates.
Administrator	Portal manager or information management specialist; installs, upgrades, and maintains Publisher configuration and content organizational structure, including security settings and workflow standards.	Administrator

For more information, see "Setting Up Security" on page 4-5.

Publisher Architecture

As a component of AquaLogic User Interaction, Publisher integrates directly with the AquaLogic Interaction portal.

Figure 2-1 Publisher and ALI: Architecture



Publisher Components

Publisher includes the following components:

Table 2-5 Publisher Components

Component	Description
Content Web Application	Provides all content management functionality and folder security for Publisher.
Workflow Web Application	Provides the logic to define and implement linear workflows that can be used to govern the approval and publishing of content.
Publisher Database	Stores the data used by Publisher. This includes content items, data entry templates, presentation templates, Publisher folders, and role assignments. File content items uploaded to Publisher, however, are stored in the Document Repository Service.
Workflow Database	Stores workflow definitions, activities, workflow instances, and workflow users.
Published Content Remote Server	The location from which the portal server fulfills web requests for published content available through the portal

ALI Components

The following ALI components are used by Publisher:

Table 2-6 ALI Components Used by Publisher

Component	Description
AquaLogic Interaction Portal	Serves end user portal pages and content. It allows users to access published content through portlets in My Pages and community pages, as well as through the Knowledge Directory. It also enables users to search all published content. In addition, it allows some administrative actions, such as editing portlets and portlet templates, viewing portlet preferences, and managing communities.
Administrative Portal	Handles portal setup, configuration, and content. It enables administrative functions, such as creating and managing portlets and other web services.
Portal Database	Stores the data used by ALI. This includes information about user profiles, portal security, web services, and all portal objects, including portlets and portlet templates. The portal database does not store the Publisher content available through the portal. Content is copied by Publisher from the Publisher database (content items) and the Document Repository Service (file content items) during publishing.
Image Service	Serves images and other static content used by the portal system.
Search Service	Hosts the search engine and search collection, which contains text and metadata indexes for objects in the portal (for example, documents, communities, and portlets). Publisher content items are indexed for search during publishing.
Document Repository Service	Stores content uploaded into the portal system, including images and file content items uploaded into Publisher.
Automation Service	Runs jobs that perform tasks such as crawling documents into the Knowledge Directory, synchronizing groups and users with external authentication sources, and maintaining the search collection.
API Service	Provides access to the SOAP API.

For more information on installing these components, see the *Installation and Upgrade Guide for AquaLogic Interaction.*

CHAPTER 3

Using Publisher Explorer

Publisher Explorer is the central interface for viewing, searching, creating, and managing all Publisher objects.

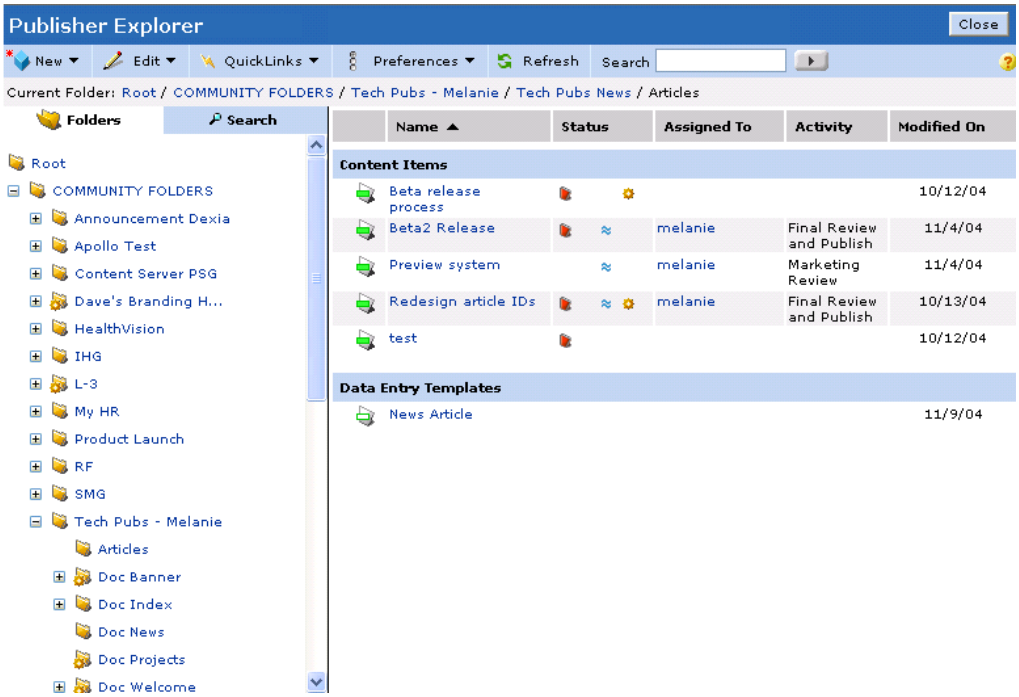
This chapter provides an overview of Publisher Explorer and includes the following topics:

- Navigating Publisher Explorer
- Using the Action Bar
- Using the Context Menu
- Viewing the Status Icons
- Setting Display Preferences

About Publisher Explorer

Publisher Explorer provides a central interface for viewing and managing all Publisher objects.

Figure 3-1 Publisher Explorer



Any user who has access to the Publisher Administration portlet can access Publisher Explorer. Users' access to specific folders and Publisher Explorer functions depends on their Publisher roles.

Depending on your Publisher role, you can use Publisher Explorer to do the following:

- View and manage the Publisher folder hierarchy, including setting security and attaching workflow to folders.
- Create, edit, copy, move, delete, rename, check in, check out, and view all Publisher objects.
- Search for content items by name, text content, workflow assignment, and Data Entry Template.
- View status information for content items and other Publisher objects.
- Publish content items and folders and set them to expire.

- Override workflow for a content item.
- Remove a content item from the search index.
- Edit or detach a portlet from a portlet folder or portlet item.

Publisher Explorer also provides multiple display preference settings, along with QuickLinks and integration with Windows Explorer using the Map a Web Folder feature.

For more information on Publisher security and its relationship to Publisher Explorer functions and display, see "Setting Up Security" on page 4-5.

For more information on the Map a Web Folder feature, see "Enabling the Map a Web Folder Feature" on page 5-2.

Navigating Publisher Explorer

The Publisher Explorer is divided into two panes: the navigation pane on the left and the table pane on the right. The table pane contains objects that belong to the node that you select in the navigation pane.

This section discusses how to:

- Use the path bar.
- Use the navigation pane.
- Use the table pane.

Using the Path Bar

Near the top left of Publisher Explorer, the Path displays the folder you are currently browsing. To navigate to a parent folder, click the folder in the path. For example, if the path displays BEA/Folder1/Subfolder1, you can click BEA to display the contents of the BEA folder.

Using the Navigation Pane

The navigation pane contains two tabs for navigating to your folders and searching for content items.

- Use the Folders tab to browse the folders in Publisher. To view the contents of the folder, click the folder. Its contents appear on the table pane.

- Use the Search tab to perform an advanced search for published and unpublished content items in Publisher. You can search by content item name, text in the content item, workflow assignment for the content item, or Data Entry Template associated with the content item.

Using the Table Pane

The table pane displays the contents (folders, content items, Data Entry Templates, selection lists, and Presentation Templates) of the folder you are browsing or the results of your search. To view an object, click its name.

Using the Action Bar

The action bar at the top of Publisher Explorer contains menus that enable you to perform the following actions:

Table 3-1 Action Bar Options

Option/Menu	Action
New	Create the following objects in the folder you are currently browsing: folder, content item, file content item, Data Entry Template, selection list, Presentation Template, and Web folder.
Edit	Modify the selected Publisher object. **Note:** Administrators and Producers can edit certain properties of a content item without checking out the content item, as long as the content item is not currently checked out by a different user. Edits performed in this manner are not added to the content item's version history.
QuickLinks	Add or remove QuickLinks. For more information, see "Setting Display Preferences" on page 3-7.
Preferences	Display or hide objects, set the current folder as the default home page of Publisher Explorer, and limit the number of items displayed in the table pane. For more information, see "Setting Display Preferences" on page 3-7.
Refresh	Update your view of Publisher Explorer with the most current information.
Search	Search for content items by name. Type the name of the content item that you want to find in the text box and click. Your results appear in the table pane.

You can also display the **New** and **Preferences** menus by right-clicking any blank area in the table pane of Publisher Explorer.

Using the Context Menu

You can right-click on any Publisher object name in either the navigation pane or the table pane to display a menu of the actions that you can take on the selected object. The actions displayed depend on the type of object and your security for the object.

Table 3-2 Context Menu Options

Option	Action	Available for Object
Check Out/Check In/Cancel Check Out	Check out a content item for editing. If you have already checked out the item, you can check in the item to save it as a new version or cancel check out to revert the content item to its previous version.	Content items
Content Security	Specify which users and groups have access to objects in this folder, and what role each of these users or groups has in this folder.	Folders
Copy to	Copy this object into the same folder or another folder.	All objects
Create Copy	Create a duplicate of this object in the same folder.	All objects
Delete	Remove this object from Publisher.	All objects
Detach Portlet	Detach portlets or portlet templates associated with a content item or folder. The folder must be a portlet folder and the content item must be a portlet item.	Folders and Content Items
Edit <object>	Modify the object.	Content items, Data Entry Templates, Selection Lists, Presentation Templates
Edit Portlet	Edit portlets or portlet templates associated with this content item or folder. The folder must be a portlet folder and the content item must be a portlet item.	Folders and content items
Move	Move this object into another folder.	All objects

Table 3-2 Context Menu Options

Option	Action	Available for Object
Preview	• Folders: view folder content as it would appear when published. • Content items: view content item as it would appear when published.	Folders and content items
Publish	Publish the selected content items. If you select a folder, all content items in the folder will be published.	Folders and content items
Publishing Target	Specify where content items in the folder will be published and where they can be previewed.	Folders
Publish to Directory	Add this content item to the portal Knowledge Directory.	Content items
Remove from Search Index	Remove the content item from the search index. Items that you remove from the search index are never returned in search results.	Content items
Rename	Change the name of this object.	All objects
Schedule	Set up a time to publish a content item or all content items in a folder.	Folders and content items
Set to Expire	Remove the content item or the contents of an entire folder from the last location to which it was published. Expiration does not delete the content item from the Publisher.	Folders and content items
Undo Expiration	Republish an expired content item.	Expired content items
Workflow	• Folders: Select workflow properties to apply to the folder. • Content items in workflow: Override the workflow assignment.	Folders and content items

For more information, see the sections of this Administrator Guide that discuss these actions in detail.

Viewing the Status Icons

The icons in the first column and in the Status column of the table pane indicate the status of the content item:

- The icons in the first column, to the left of the content item name, provide the check-in, check-out, and editing status of the content item.
- The icons in the Status column indicate the following statuses of a Publisher object:
  - Publishing
  - Publication and expiration scheduling
  - Expiration
  - Workflow
  - Portlet usage
  - Portlet template usage

Mouse over an icon to view status details.

For more information about status icons, see the online help.

Setting Display Preferences

You can set multiple display preferences for Publisher Explorer:

- To display or hide columns from the table pane, right-click to open the context menu, click **Columns**, then select the column. A check mark next to the column name indicates that the column is currently displayed in the table pane.
- To display or hide objects (such as folders, content items, Data Entry Templates, and so on), click **Preferences** in the action bar or in the context menu and select the objects to display or remove.
- To limit the number of items displayed in a page of the table pane, click **Preferences** in the action bar or in the context menu and click **Items Per Page**. Use the page scrolling arrows at the bottom of the table pane to scroll through table pane pages.
- To sort the objects in the table pane by column, click on the column heading.
- To display the contents of a particular folder every time you launch Publisher Explorer, click **Preferences** in the action bar or in the context menu and click **Set Home to Current Folder.**

- To bookmark frequently used objects or folders for quick access, select the object or folder and click **QuickLinks | Add QuickLink** in the action bar.

For more information on setting display preferences, see the online help.

CHAPTER 4

Setting up and Securing the Publisher Folder Structure

One of the primary tasks of users in the Administrator role in Publisher is to set up and secure the folder structure of Publisher. Administrators can delegate ownership and maintenance of the content organizational structure, but only users in the Administrator role can set up and secure the top level of folders.

The tasks involved in setting up the Publisher folder structure include:

- Defining a folder structure.
- Securing access to the folders.
- Configuring publishing targets and preview sites (where content items are published by Publisher and accessed by the portal)
- Attaching workflow to top-level folders.

This chapter includes the following topics:

- Defining Your Folder Structure and Managing Folders
- Setting Up Security
- Configuring Publishing Targets and Preview Sites

For a discussion of how to set up and attach workflow to Publisher folders, see Chapter 12, “Using Workflow.”

Defining Your Folder Structure and Managing Folders

This section provides an overview of the Publisher folder structure. It also discusses how to create new folders.

Publisher Folder Structure

Users with the Administrator role are responsible for creating the top-level Publisher folders. The folder structure, along with the security attached to each folder, determines the extent to which content management responsibility is concentrated in a small group of administrators or distributed to a number of content managers.

You can set up your Publisher folder structure in any way that suits your organizational needs. You should, however, consider the following:

- Every Publisher folder has security assigned to it or inherits the security of the next folder up in the hierarchy. This means that the Publisher folder structure represents a picture of how your organization administers and delegates the work of managing content. It makes sense, then, to organize your Publisher folders according to a security hierarchy.

  For more information on security settings, see "Setting Up Security" on page 4-5.

- Your Publisher folder structure should be closely related to your portal administration folder structure to the extent that content and community management responsibilities are shared by the same set of users and groups. This is especially true for portal administration folders that include portlets and portlet templates created in Publisher, since, when you create portlets and portlet templates in Publisher, you also create objects in the portal's administrative hierarchy that are associated with the Publisher objects. You usually want users with access to the portlets and portlet templates in portal administration to have appropriate access to the associated Publisher objects.

  For more information on mapping portal and Publisher security, see "Mapping Portal Security to Publisher Security" on page 4-11.

- By default, the folder structure on the web server where you publish content items (the *publishing target)* follows the Publisher folder structure. That is, every time you publish a content item, Publisher places it in a folder structure on the target web server that, by default, exactly matches the folder structure in Publisher. Users in the Administrator and Folder Administrator roles can override this default mirroring of the Publisher and web server folder structures, but the closer your Publisher folder structure is to the web server folder structure you want, the less often you will have to specify the publishing targets for folders and content items. Therefore, you should consider your web server folder structure when you organize your Publisher folders.

For more information on publishing targets and how to override the default web server folder structure, see "Configuring Publishing Targets and Preview Sites" on page 4-14.

- Publisher objects that work together as a single application—such as a group of portlets that function as an employee services or customer support application—should be grouped into the same folder or folders, when possible. This makes it easier to maintain them and to apply consistent security.

A high-level example of a folder structure based on departmental and administrative responsibilities would be the following:

ROOT

- COMMUNITIES
  - Engineering
  - Marketing
  - Support Center
- IMAGES
  - Branding
  - Icons
  - Technical Publications
- PORTAL ADMINISTRATION
  - Home Page
- PORTLET TEMPLATES
  - Articles
  - Banners
  - Community
- TESTING
  - New portlet templates
  - New portlets

In this example, the content administrator has organized the high-level folder structure according to security access and a function-based taxonomy.

The following table lists the security that the administrator in this example has provided for the contents of each top-level folder:

Table 4-1 Example of Security Assignments for Publisher Top-Level Folders

Folder	Groups with Access and their Roles	Comments
Communities	• Portal Management Team: Folder Administrator • Community Managers: Editor	Each community folder contains portlets for that community. For each community folder (such as Engineering and Marketing), the appropriate community manager has a Folder Administrator role.
Portal Administration	• Portal Management Team: Folder Administrator	Contains portlets to be displayed on the portal home page, such as corporate announcement or holiday schedule.
Portlet Templates	• Portal Management Team: Folder Administrator or Producer (depending on administrative versus web development roles) • Community Managers: Editor	The portlet templates are organized into folders representing portlet template types. Since portlet templates are most likely to be created by web developers on the portal management team, they have greater access to the top-level folder than do community managers, who are the primary *users* of portlet templates.
Images	• Portal Management Team: Folder Administrator • Marketing Team: Producer • Developer Team: Editor	Keeping images in a single folder with the Image Service as publishing target enables non-gatewayed access to images. Giving the marketing team Producer access enables them to control consistent imaging across portlets.
Testing	• Portal Management Team: Folder Administrator • Developer Team: Folder Administrator	A top-level testing folder is useful as sandbox for testing portlet applications before rolling them out.

For detailed descriptions of the access provided by each Publisher role, see "Publisher Roles" on page 4-6.

Creating New Folders

You can create folders using Publisher Explorer or by creating a published content portlet using the Configure Portlet Wizard.

Caution: Only users with the Administrator role can create or modify top-level folders.

Publisher Explorer

To create a new folder in Publisher Explorer:

1. Navigate to the folder in which you want to create the new folder.

   To create new top-level folders, navigate to the root folder.

2. Click **New** | **Folder** in the menu bar or right-click in the table pane and choose **New | Folder**.

3. Enter a name for the folder and click **OK.**

Note: If you use the Map a Web Folder feature to view the Publisher folder structure using Windows Explorer, you should avoid using folder names that include the following characters: \ / : * ? " < >. Windows Explorer does not allow file or folder names that include these characters, and any such folders will not appear in the Publisher folder structure when viewed with Windows Explorer.

For more information on Publisher Explorer, see Chapter 3, “Using Publisher Explorer.”

Published Content Portlet Folders

When you create published content portlets using the Configure Portlet Wizard, Publisher creates the corresponding portlet folder automatically in the folder specified as the save-to location.

You can also use Publisher Explorer to create portlet folders, just as you do with any lower-level folder.

Portlet folders have some particular requirements and functions that differentiate them from other folders in the Publisher folder structure.

For more information, see “Managing Published Content Portlet Folders” on page 6-14.

Setting Up Security

This section provides an overview of Publisher security and discusses how to:

- Assign the Administer Publisher and Configure Workflow activity rights.
- Assign users and roles to Publisher folders.
- Map portal security to Publisher folder security.

Publisher Security Overview

Security in Publisher is role-based and is set at the folder level. Each Publisher role has a defined level of access to Publisher functions. For each folder you create in Publisher, you can specify which AquaLogic Interaction users and groups are assigned to which Publisher roles, or you can choose to have the folder inherit its security from the next folder up in the hierarchy. *Administrators* can assign security to all Publisher folders, including top-level folders. *Folder Administrators* can assign security to lower-level folders.

For example, let us say you, as Administrator, have created a Marketing folder for all marketing community portlets and content. You want the Marketing community manager to have the ability to edit, delete, rename, reassign security, override workflow, and publish the portlets in the folder, so you assign the community manager the *Folder Administrator* role, which gives him access to these functions for the folder. You want the web master to be able to modify the Presentation Templates and Data Entry Templates for the Marketing community portlets, so you assign her the *Producer* role, which gives her access to those functions, but without the ability to change security settings, delete, or rename the folder. And you want certain community members to be able to view version history and publishing information for the portlets in the folder, so you give them the *Contributor* role. By default, the *Administrator* role always has full access to all Publisher folders and functions.

Note: Publisher security does not affect access to portlets through the portal. You define this access in portal security. It is important, however, that Publisher security mirror portal administration security as closely as possible for any published content portlets that enable users to submit content through the portal. Publisher therefore provides a means for mapping portal security to Publisher security for a portlet. For more information see "Mapping Portal Security to Publisher Security" on page 4-11.

Publisher Roles

Access to content and features in Publisher is controlled through the following roles:

- *Reader:* enables you to view content and—if you have been assigned an item in workflow—approve or reject the item, or transfer your workflow assignment to another user.

- *Submitter:* enables you to create, preview, edit and submit articles to workflow, as well as approve or reject an item you have been assigned in workflow.
- *Contributor:* provides the same permissions as Submitter, but also allows you to view content item notes, workflow, version history, publishing information, and publishing schedule.
- *Editor:* provides the same permissions as Contributor, but also allows you to publish items to the web server and to the portal Knowledge Directory.
- *Producer:* provides the same permissions as Editor, but also allows you to create and edit folders, Data Entry Templates, selection lists, and Presentation Templates; preview and publish content items both individually and by folder; edit content items assigned to others; and configure folders to publish and preview.
- *Folder Administrator:* provides the same permissions as Producer, but also allows you to undo other users' check-outs, manage published content portlets, attach workflow to folders, and set Publisher security on folders. In short, Folder Administrators can perform all Publisher functions on the folders for which they have the role.
- *Administrator:* provides access to every folder and every feature in Publisher, including top-level folders. Administrators do not automatically have access to Workflow administration, however. That access is granted by the Configure Workflow activity right. The Administrator role is granted automatically to users in the portal Administrators group and can also be assigned to other users through the Administer Publisher activity right.

Note: Access to Workflow administration requires the Configure Workflow activity right and is independent of Publisher roles. For more information, see "Assigning the Administer Publisher and Configure Workflow Activity Rights" on page 4-9

Caution: You might be assigned different roles in different Publisher folders.

The following table provides a detailed list of Publisher functions and the roles that have access to them.

Table 4-2 Publisher Functions and Roles
Key: R = Reader; S = Submitter; C = Contributor; E = Editor; P = Producer; FA = Folder Administrator; A = Administrator.

Function	Roles with Access
Create top-level folders	A
Copy, rename, move, and delete top-level folders	A, FA

Table 4-2 Publisher Functions and Roles
Key: R = Reader; S = Submitter; C = Contributor; E = Editor; P = Producer; FA = Folder Administrator; A = Administrator.

Function	Roles with Access
Security: assign users, groups, and roles to folders	A, FA
Detach portlet from folder	A, FA
Attach workflow to a folder in Publisher Explorer	A, FA
Override workflow	A, FA
Undo checkout (by other user)	A, FA
Create, delete, copy, move, and rename lower-level folders (move requires permission on both the move from and move to folders)	A, FA, P
Create new Data Entry Templates, Presentation Templates, and selection lists	A, FA, P
Edit content items assigned to another user in workflow	A, FA, P
Set publishing targets	A, FA, P
Publish to directory	A, FA, P, E
Publish content item or folder	A, FA, P, E
View and edit publishing information in Content Item Editor	A, FA, P, E
Schedule publishing and expiration	A, FA, P, E
View and restore versions in Content Item Editor	A, FA, P, E, C
Create, edit, copy, delete, and rename content items	A, FA, P, E, C, S
Preview content items	A, FA, P, E, C, S
Check content items in and out	A, FA, P, E, C, S
Use WebEdit when creating and editing content items	A, FA, P, E, C, S
Access WebDAV and set up a Web folder for Publisher	A, FA, P, E, C, S
Set user Quicklinks and preferences in Publisher Explorer	A, FA, P, E, C, S

Table 4-2 Publisher Functions and Roles
Key: R = Reader; S = Submitter; C = Contributor; E = Editor; P = Producer; FA = Folder Administrator; A = Administrator.

Function	Roles with Access
Use the Copy to function in Publisher Explorer (security applies to the folder copied to)	A, FA, P, E, C, S
Use the Move to function in Publisher Explorer (security applies to the folder moved to)	A, FA, P, E, C, S
Create a new folder in a Community Directory portlet	A, FA, P, E, C, S
Browse, search, and view published content portlets	A, FA, P, E, C, S, R
Browse, search, and view intrinsic Publisher portlets	A, FA, P, E, C, S, R
Be assigned to workflow activities	A, FA, P, E, C, S, R
Approve or reject a work item	A, FA, P, E, C, S, R

Publisher and Workflow Activity Rights

Users are given the Administrator role by being granted the *Administer Publisher* activity right. An activity right is a security function that assigns access to a set of administrative activities. By giving access to the Administrator role, the Administer Publisher activity right provides complete access to all Publisher functions except workflow administration.

The *Configure Workflow* activity right is required to give access to all Workflow Administration features, and we recommend that it be granted to all users in the Administrator role.

Users in the Administrators group in portal security have the Administer Publisher and Configure Workflow activity rights by default, and users in this group can delegate their authority by assigning it to any other portal group. Most organizations assign the Administer Publisher and Configure Workflow rights to their information technology manager, portal manager, or web master.

Assigning the Administer Publisher and Configure Workflow Activity Rights

To grant an activity right to a group:

1. Log in to the portal.
2. Click the **Administration** tab.
3. Select the **Activity Manager.**
4. Click the activity right you want to edit.
5. Click **Add Groups.**
6. Select the group to which to grant the activity right.
7. Click **OK.**
8. Click **Finish.**

For information on assigning activity rights in the portal, see the *Administrator Guide for AquaLogic Interaction.*

Assigning Users and Roles to Publisher Folders

Once a user has been assigned the Administrator role through the Administer Publisher activity right (which is granted by default through membership in the portal Administrators group), that user can set up security for the top-level Publisher folders. Once an Administrator has set up security for the top-level folders, users in the Folder Administrator role can assign security for any folders for which they have that role, including top-level folders. By default, security settings cascade down from folders higher in the hierarchy to all lower-level folders, unless an Administrator or Folder Administrator overrides the security inheritance for the lower-level folder.

Note: You cannot override inherited Administrator or Folder Administrator assignments for a folder.

Before you can assign Publisher security, the users and groups must already be defined in portal administration.

For more information, see the *Administrator Guide for AquaLogic Interaction.*

To assign a user or group to a Publisher role for a Publisher folder:

1. Access the Content Security page. You can access this page the following ways:
   – From Publisher Explorer, right-click on the folder for which you want to assign security and click **Content Security.**

- From the Configure Portlet Wizard, click the **Security** button. You can set security for any portlet folder for which you have the Folder Administrator role.
- From the Configure Portlet Template Wizard, navigate to the **Template Security** page and click the **Edit** button. You can set security for any portlet template folder for which you have the Folder Administrator role.

2. On the Content Security page:
   - If you want the folder to inherit the Publisher security of the Publisher folder it resides in and you *do not* want to map a portal administration object's portal security to the folder's Publisher security, check the **Inherit Security** checkbox. This option is checked by default when you create a folder.
   - If you want to specify the Publisher security for the folder or you want to map a portal administration object's portal security to the folder's Publisher security, clear the **Inherit Security** check box. This activates the **Add Users and Groups** and **Add Portlet Security Map** buttons.

   Note: The Content Security page works slightly differently for Portlet Templates. For more information, see "Accessing the Configure Portlet Template Wizard" on page 11-3.

   - Use the **Add Users and Groups** button to select and add users and groups that should have access to the folder. Use the **Role** column to assign a Publisher role to each user and group.
   - If you want to map the folder's Publisher security to a portal object's portal security, click the **Add Portlet Security Map** button to activate the mapping fields.

     For more information about mapping portlet security to Publisher security, see "Mapping Portal Security to Publisher Security" on page 4-11.

3. Click **Finish** to save the security settings.

Mapping Portal Security to Publisher Security

ALI portal security is maintained separately from Publisher security. For example, access to a portlet in the portal is maintained in portal administration and controls such things as the ability to add a portlet to a user My Page or view a portlet in a community. Security for the Publisher objects that make up the portlet (the portlet folder, subfolders, content items, Data Entry Templates, selection lists, and Presentation Templates) is defined entirely within Publisher. In general, users with access to a portlet in the portal should have the same level of access to the portlet in Publisher. Without this mapping of portal security to Publisher security, the following might occur:

- Users who attempt to submit content through a portlet might be denied access to the underlying Publisher portlet folder and be unable to create the content item.
- Users who attempt to create a portlet from a portlet template might be denied permission to copy the portlet template's Publisher folder and objects and be unable to create the portlet.

You can use the Content Security page to map a portal object's security to the Publisher security for a Publisher folder. When you do so, Publisher automatically adds all of the users on the portal object's Access Control List (ACL) to the Publisher security list for the folder, with Publisher roles that you specify on the Content Security page. The following table provides an example:

Table 4-3 Portal to Publisher Security Mapping

Portal Object Security	Publisher Folder Security
Read	Submitter
Select	Submitter
Edit	Producer
Admin	Folder Admin

In this example, all of the users with *Read* access to the portlet in the portal will have *Submitter* access to the Publisher portlet folder, and so forth.

If a user's access to a Publisher folder as defined by portal security mapping is not the same as the user's *explicit* Publisher folder security (as defined in the Users/Groups and Role columns on the Content Security page), the higher access level applies. For example, if a user has the Submitter role for the Publisher folder by virtue of his or her portal security access level and the Contributor role by virtue of his or her explicit Publisher security for the folder, the user will have the Contributor role for the folder.

To map a portal object's security to Publisher security for a Publisher folder:

1. Access the Content Security page for the folder (or portlet or portlet template).

   See "Assigning Users and Roles to Publisher Folders" on page 4-10.

2. Click **Add Portal Security Map** to access the Portal Object dialog box, where you can select the portal objects from which you want to apply the security on the Publisher folder.

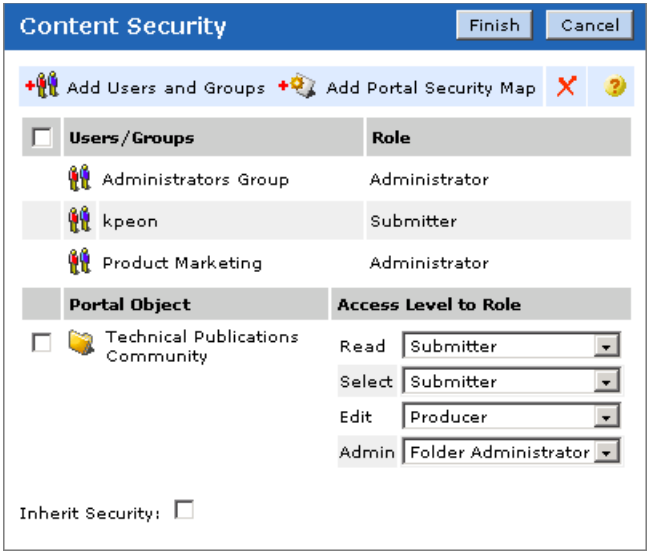
   Note: When you open the Content Security page from within the Configure Portlet Template Wizard, a shortcut button appears, labelled with the portlet template's

name. Click it to add the portlet template to the Portal Object column without opening the Portal Object dialog box.

3. When you have selected the portal object whose security you want to map, the portal object appears in the **Portal Object** column on the Content Security page.

4. In the **Access Level to Role** column, select the appropriate Publisher role for each portal security access level.

Figure 4-1 Content Security Page Displaying Portlet Mapping Fields



For example, let us say you are assigning security to a Technical Publications News portlet folder, and the portal object whose security you are mapping is the community. If you map the *Select* portal access level to the *Submitter* role, all users with *Select* portal access to the community will have *Submitter* access to the portlet folder in Publisher, and will be able to create, edit, and review content items for the portlet.

5. Click **Finish** to save the security settings.

Note: This process is slightly different if you are mapping portal security to Publisher security for a new published content portlet template. For more information, see "Using the Template Security Page" on page 11-5.

Configuring Publishing Targets and Preview Sites

This section provides an overview of publishing targets and preview sites and discusses how to:

- Configure the publishing target and preview site for the root folder.
- Configure publishing targets and preview sites for all other folders.

Publishing Targets and Preview Sites

After you set up your folder structure in Publisher, you must designate where the content items in your Publisher folders will be *previewed* and *published*.

- The *Preview Site* is the file location where the formatted, web-ready content item is staged for viewing during content item editing and workflow, prior to publishing.
- The *Publishing Target* is the file location where the formatted, web-ready content item is published to the portal or other web server.

Publisher must have access to these locations either over the network or FTP, and must have write access to the folder. To configure a Publisher publishing target, determine the location of the server and how it is accessed over the network and Internet:

- *Transfer Path:* Publisher uses the transfer path to save content items to the publishing target. You can use standard file transfer or FTP:
  - If the publishing target is located on the same server or on a mapped network drive, you can upload content items using standard file transfer, over a path that includes the drive letter and folders. For example: file://localhost/w:/website/wwwroot/. Or you can use UNC paths if your publishing target is located on a different server. For example, file:////machinename/wwwroot.
  - To use FTP, you must know the name of the FTP server and its security requirements. You might be allowed to upload to the server anonymously, or you might be required to provide a valid user name and password. FTP transfer paths take the form ftp://host:port/path/. For example: ftp://ftp.mycompany.com/wwwroot/
- *Browser Path:* No matter how you upload files to a site, you must also determine the browser path (URL or web address) so that Internet browsers can display the content. Links to published content use this path to access items from the publishing target through a web browser.
- *Publish images to a separate location:* If you find that performance is slower when published images are gatewayed, you can specify a different publishing target for images

and publish them to a server outside the gateway space. If you click the **Publish images to a separate location** check box, you can configure the image's publishing target the same way you would configure the other content types. The following image publishing options display: Transfer using, Transfer Path, Browser Path, and Test Images Publish Target.

Note: If you want folders that do not have a proper entry point (such as index.html or default.html) to display a listing of their contents, you must enable directory browsing for your web server.

Users in the Administrator role configure the publishing target and preview site for the root folder. Users in the Producer role and above can configure publishing and preview targets for all other folders.

By default, each folder inherits publishing and preview locations from its parent folder in the hierarchy. For example, let us say that the root folder's publishing target is the following:

file://localhost/C:/Program Files/mycompany/ptcs/publishedcontent/publish

And let us say that there is a content item in the following folder within the Publisher folder structure: Root/Communities/Marketing/Marketing News. The default publishing target for that content item would be:

file://localhost/C:/Program Files/mycompany/ptcs/publishedcontent/publish/communities/marketing/marketing news/<content item>

The publishing target directory structure, by default, mirrors the Publisher folder structure. You can break this default web server directory structure by overriding the publishing target inherited from the parent folder at any folder level by configuring a different publishing target for the folder. All subfolders of that folder then inherit the new publishing target.

Taking the above example, let us say that you want the content items in the Marketing folder to be published to the following folder on the web server:

file://localhost/C:/Program Files/mycompany/ptcs/publishedcontent/publish/communities/sales_and_marketing

You would change the publishing target for the Marketing folder to that new file path. All folders below the Marketing folder level would inherit this publishing target (unless you in turn change their publishing targets). And the content item in the above example would now be published to the following target:

file://localhost/C:/Program Files/mycompany/ptcs/publishedcontent/publish/communities/sales_and_marketing/marketing news/<content item>

Configuring the Publishing Target and Preview Site for the Root Folder

A user in the Administrator role must configure the publishing target and preview site for the root folder before configuring any other folders. To configure the root folder for publication and preview:

1. Open Publisher Explorer.
2. Right-click the root folder and select **Publishing Target**.
3. Click the **Publish** tab.
4. Choose the method of transfer: **FTP** or **File path**.

   Note: Use **File path** only if the server is accessible through a local drive or a mapped network drive.

5. In **Transfer Path**, type the path to the location that you have selected as the publishing target. Transfer Path accepts UNC (Uniform Naming Convention) paths.
6. If you chose FTP in step 4, select one of the following:
   - **Use anonymous FTP**: The target system has a guest account that requires no password.
   - **Log in**: The target system requires a password. You must enter a valid User Name and Password.
7. In **Browser Path**, type the URL (web path) to the location you have selected as the publishing target.
8. If you want the folder structure of the publishing location to match the Publisher folder structure for this folder and its subfolders, leave the **Mirror Site Hierarchy** checkbox selected. Clear the checkbox if you want all content items in this folder to reside in a flat structure within this folder, with no lower-level folder hierarchy. The system adds a unique ID to each published item in this case to avoid interference between any items in the folder that share the same name.

   Note: While most users do not choose to publish content items into a flat web server directory structure, it can be useful in some situations. For example, you may have several Publisher folder trees, each containing an image folder, and all of the images are published to the same folder on the web server. If you clear the Mirror Site Hierarchy checkbox, each item name in the folder and its subfolders will be given a

unique ID, thus preventing any image files that share the same name from interfering with the others.

9. Click the **Preview** tab and follow steps 4 - 8 for the Preview Site.
10. If you want to test whether the transfer path and browser path point to the same location, click **Test Publish Target.** Any error messages appear at the bottom of the page.
11. Click **Finish** to save your changes and close the window.

Configuring the Publishing Target and Preview Site for All Other Folders

By default, all folders inherit publishing and preview locations from the folder above them in the Publisher folder hierarchy. Administrators, Folder Administrators, and Producers can override this inheritance and configure a new publishing target or preview site for a folder other than the root folder. When you configure a folder, all of its subfolders inherit the new configuration.

To modify the publishing and preview settings for any folder, right-click the folder and choose **Publishing Target**. Follow steps 3 - 11 under "Configuring the Publishing Target and Preview Site for the Root Folder," after first clearing the **Inherit parent folder settings** to enable the reconfiguration.

If you configure a folder and later want to reset it to inherit the parent's settings, select the **Inherit parent folder settings** checkbox on the **Publishing Targets** page. This resets both the publishing targets and preview site to that of the parent folder.

CHAPTER 5

Using WebDAV

The **WebDAV** (Web-based Distributed Authoring and Versioning) protocol enables a user to perform bulk uploading and downloading of files using the **Map a Web Folder** feature. It also allows the user to use Windows Explorer to view the Publisher folder hierarchy and open file content items for editing.

WebDAV is required for using the **WebEdit** feature. WebEdit simplifies the process of editing a content file property in Publisher. Using this feature a user can edit a Microsoft Office document file property "in place," without having to perform uploads and downloads.

This chapter includes the following topics:

- Enabling WebEdit
- Enabling the Map a Web Folder Feature
- Configuring WebDAV Settings

Enabling WebEdit

The WebEdit feature is implemented using the WebDAV protocol. By default, the Publisher installer installs the WebDAV protocol and sets values specific to WebEdit in the content.properties file. WebDAV supports the same security settings applied to the folders in the Publisher.

Client Security Settings

The first time users attempt to use the WebEdit feature, they are prompted to install and run a web editing object. They must select **Yes** in order to be able to use the WebEdit feature.

End users must also configure their browsers to enable or prompt for Microsoft ActiveX controls in order to use this feature.

Enabling the Map a Web Folder Feature

The Map a Web Folder feature allows users to map a Network Place on their local Microsoft Windows computer to the Publisher directory. This allows the user to view the Publisher folder hierarchy using Windows Explorer. Folders and file content items on Publisher appear as folders and files in Explorer.

Note: Only file content items appear in Windows Explorer. Other Publisher objects, like Publisher-created content items, Presentation Templates, and so forth, do not appear.

Note: If you use the Map a Web Folder feature to view the Publisher directory using Windows Explorer, you should avoid using folder names that include the following characters: \ / : * ? " < >. Windows Explorer does not allow file or folder names that include these characters, and any such folders will not appear in the Publisher directory when viewed with Windows Explorer.

Mapping a Folder

This section describes the procedures an end user must perform to use the Map a Web Folder feature. You should perform these procedures to test this feature before rolling out a production version of Publisher.

1. Open **Publisher Explorer.**
2. Select **New | Web Folder**.
3. Map the Web folder.

   To map a Web folder in Windows 2000:

   a. Copy the URL in the **Web Folder Location** text box.

   b. Open **My Network Places** on your desktop.

   c. Double-click **Add Network Place**. The **Add Network Place** wizard appears.

d. In the **Type the location of the Network Place** text box, paste the URL. Then click **Next**.

e. If prompted, enter your name and password. Then click **OK**.

f. In the **Enter a name for this Network Place** text box, type a name. Then click **Finish**.

A new network place will be created and your Publisher is now mapped on Windows Explorer.

To map a Web folder in Windows XP:

a. Copy the URL in the **Web Folder Location** text box.

b. Open **My Network Places** on your desktop.

c. Double-click **Add Network Place**. The **Add Network Place** wizard appears.

d. Click Next.

e. Select **Choose another network location**.

f. In the **Internet or network address** text box, paste the URL; then click **Next**.

g. If prompted, enter your name and password, then click **OK**.

h. In the **Type a name for this network place** text box, type a name, then click **Finish.**

A new network place will be created and your Publisher is now mapped on Windows Explorer.

Configuring WebDAV Settings

You can perform advanced configuration for WebDAV by doing the following:

- Enabling and disabling the Map a Web Folder and WebEdit features using the content.properties file.
- Enabling WebEdit for certain file types.
- Configuring IIS.

Enabling and Disabling WebDAV Features Using Content.Properties

You can enable and disable WebDAV features by setting the following properties in the content.properties file:

Table 5-1 WebDAV Configuration

Configuration Property	Setting	Explanation
`WebDavClientAccessEnabled =`	true	Enables the Map a Web Folder feature.
`WebDavClientAccessIsGatewayed =`	true	Access to the Publisher WebDAV server will go though the gateway. Gatewaying the Publisher items is a more secure way to view them, but it will lower the performance.
`WebDavInPlaceEditingEnabled =`	true	Enables the WebEdit feature.
`WebDavInPlaceEditingIsGatewayed =`	true	Access to the Publisher WebDAVserver will go though the gateway when using the WebEdit feature.

Enabling and Disabling WebEdit by File Types

You can enable the WebEdit feature for certain file types based on their file extensions. You do this in the content.properties file.

Table 5-2 File Type Configuration

Configuration Property	Extensions	Explanation

`WebDavMSWordExtensions =`	`.doc`
	`.dot`
	`.wiz`
		Lists file extensions for files that should be opened with Microsoft Word.

Table 5-2 File Type Configuration

Configuration Property	Extensions	Explanation
`WebDavMsExcelExtensions =`	`.xls` `.xlb`	Lists file extensions for files that should be opened with Microsoft Excel.

`WebDavMSPowerPointExtensions =`	`.pot`
	`.ppa`
	`.pps`
	`.ppz`
	`.pwz`
	`.ppt`
		Lists file extensions for files that should be opened with Microsoft Power Point.

Note: You can specify additional extensions to open files in Word, Excel, or Power Point, but not additional lines for other applications. WebEdit supports only Microsoft Word, Excel, and Power Point applications.

Configuring IIS

If you are using the Map a Web Folder feature when the portal is running IIS, you must ensure that the Front Page server extensions are disabled on the IIS web site where the portal is deployed.

1. Choose **Start | Programs | Administrative Tools | Internet Service Manager**.
2. Right-click on the web site used by the portal.
3. Select **Properties**.
4. Select the **Server Extensions** tab.

   If you receive a message stating that the server has not been configured to use server extensions, then IIS is configured correctly.

   If the **Enable authoring** check box exists, ensure that it is not selected.

CHAPTER 6

Creating Published Content Portlets

Publisher uses portlets to deliver content through the portal. These portlets are referred to as *published content portlets*. Publisher provides three sample content portlet templates that you can use to create published content portlets using the Portlet Editor and the Configure Portlet Wizard, and three branding portlet templates that you can use to create content canvas, header, and footer portlets for community pages and experience definitions. In addition, Publisher provides a portlet template editor and wizard that enable you to customize the sample templates or create your own portlet templates. We also provide a Published Content web service that you can use to create portlets from existing web pages without using portlet templates.

This chapter includes the following topics:

- Creating and Editing Published Content Portlets Using Sample Portlet Templates
- Creating and Editing Branding Portlets
- Creating and Editing Published Content Portlets Using the Published Content Web Service
- Deleting a Published Content Portlet

For information about the portlet template wizard, see Chapter 11, "Configuring Custom Portlet Templates."

Creating and Editing Published Content Portlets Using Sample Portlet Templates

This section provides an overview of the sample published content portlet templates and discusses how to:

- Create new published content portlets.
- Configure published content portlets using the Configure Portlet Wizard.
- Edit objects in sample published content portlets.
- Set Publisher security for published content portlets.
- Manage published content portlet folders.

Sample Published Content Portlet Templates

The sample portlet templates provide default Data Entry Templates and Presentation Templates (and in some cases default content items) for three widely useful portlet types:

- Announcement portlet
- News portlet
- Community Directory portlet

You can create portlets from these templates accepting all defaults, or you can use the Configure Portlet Wizard to edit the portlet objects included in the template to achieve the exact presentation and data formatting that you want.

Announcement Portlet Template

Announcement portlets display a formatted text message that Community Managers (or any user with an Editor role or higher for the portlet folder) can edit and publish using the Content Item Editor or the Configure Portlet Wizard. The message can include images, links to web sites, or other content.

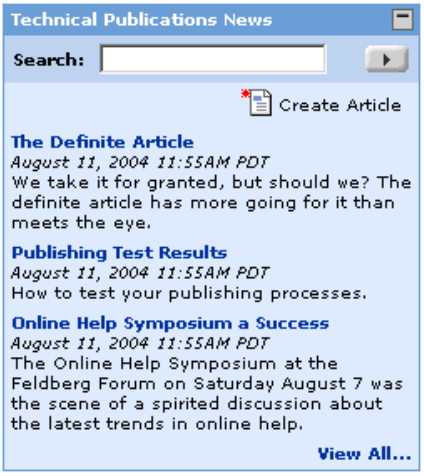
A typical use case for an Announcement portlet would be to keep community members informed of up-to-the-minute developments or other important community messages. An Announcement portlet could also be used as an introduction and label for a community page and could include an explanation of the community's purpose.

News Portlet Template

A News portlet displays a browsable list of published content items (articles) on its main page and the articles themselves on individual article pages. You can enable community members to search, create, edit, and delete articles in the News portlet.

A typical use case for a News portlet would be to facilitate communication between community members by allowing members to submit timely information about recent developments and key issues to be displayed to the community. A News portlet can also provide access to the latest reports on topics of concern to the Community.

Figure 6-1 News Portlet Main Page



The main page of the news portlet displays a lists of article titles and abstracts, along with their publishing dates and times. When you create the portlet, you can also add a search field that enables community members to search all articles in the portlet's root folder, as well as a Create Article button that brings up the Content Item Editor for a news article and enables community members to create articles directly into the portlet.

When you create a portlet from the news portlet template, you can limit the number of titles and abstracts listed on the main page; to view the titles and abstracts of all articles in the portlet folder, you can select View All to view the Index page, which lists all articles.

News article pages themselves consist of name, title, abstract, and body fields. When you create the portlet form the portlet template, you can also add Edit and Remove buttons to news article pages to enable community members to edit or delete articles directly from the portlet.

Community Directory Portlet Template

A Community Directory portlet displays articles in a browsable folder structure. You can also enable community members to search, create, edit, and delete articles in the Community Directory portlet.

A typical use case for a Community Directory portlet would be as an interface for a community knowledge base. A Community Directory portlet can also enable members to access content in an important community folder from within a community page.

A Community Directory portlet consists of:

- A main page
- Folder pages
- Article pages

Main Page

A Community Directory portlet's main page includes a list of articles (in the **Documents** area) and a list of folders that themselves contain lists of articles or subfolders with articles (in the **Folders** area). You click on the document name to view the article page for the document; you click the folder name to view the list of articles in the folder.

Figure 6-2 Community Directory Main Page

You can also enable the main page to include:

- A **Search** box that enables you to search for all articles in the portlet's root folder and subfolders.
- A **Create Folder** button that enables you to access the Create Folder page, where you can create new folders. You can also create subfolders within folders.
- A **Create Article** button that enables you to access the Create New Item page, where you can create new articles. The fields available on the Create New Item page depend on the article type that you select in the drop-down list: **Info, HowTo,** or **Problem.**

Folder Page

A Folder page displays a list of the folders and articles included in the folder. It can also display a search box, a create articles button, an article type drop-down list, and a create folder button—if you enable these functions when you create the portlet.

Article Pages

The Community Directory portlet template includes data entry and Presentation Templates for three article types:

- Info Article
- HowTo Article
- Problem Article

If you elect to include the Create Article button on the main page, community members can create these articles directly from the portlet.

Info Articles and HowTo Articles are each simple article types, enabling community members to enter a Name, Title, Summary long text field, and More Info long text field using the Content Item Editor.

Problem Articles enable community members to enter information about a problem and resolution, using Name, Title, Summary, Cause, Resolution, Problem Status, and More Information fields.

Creating a New Published Content Portlet

You create published content portlets using the Portlet Editor in the ALI portal and the Configure Portlet Wizard in Publisher.

Each published content portlet represents a folder in Publisher. When you create a published content portlet, the system automatically creates a folder using the name that you enter in the Portlet Editor or Configure Portlet Wizard. The system creates the associated data entry and Presentation Templates and places them in the new folder. Content items created through a published content portlet are stored in the portlet's Publisher folder and are searchable.

Each published content portlet is also stored as a portal object in an administrative folder in the ALI portal.

To create a new portlet:

1. In the ALI portal, click Administration.
2. Click on the portal administrative folder where you want to keep the portlet.
3. Click **Create Object** | **Portlet**.
4. Choose the portlet template for the type of published content portlet you want to create. This launches the Portlet Editor.

   Note: You can also access the Portlet Editor from the portal Community Editor by clicking This Community's Portlets, then Create Portlet. This launches the Choose Portlet Template page in the Portlet Editor.

5. Click the **Edit** button next to Configure this Portlet to access the Configure Portlet Wizard in Publisher.
6. Use the Configure Portlet Wizard to define the portlet properties.

   For more information see "Configuring the Published Content Portlet with the Configure Portlet Wizard" on page 6-6 and "Editable Objects in Sample Published Content Portlet Templates" on page 6-8.

7. Click Finish.
8. Save.

For instructions and a detailed description of the Portlet Editor, see the *Administrator Guide for AquaLogic Interaction* or view the online help.

Configuring the Published Content Portlet with the Configure Portlet Wizard

The Configure Portlet Wizard provides a single interface that you can use to perform the tasks required to create a published content portlet from a portlet template. You can accept all of the

defaults provided by the portlet template, or you can use the Configure Portlet Wizard to modify the presentation, data structure, and content of a portlet. In general, we recommend that you create a new portlet with the sample Data Entry Templates and Presentation Templates, publish it, view it, and then return to the Configure Portlet Wizard to make any further modifications. Remember that modifications to Data Entry Templates and Presentation Templates may require HTML editing skills.

1. Access the Configure Portlet Wizard from the Portlet Editor (see "Creating a New Published Content Portlet" on page 6-5).

2. On the **Create Portlet** page, enter the portlet **Folder Name** and the **Save to Location** (Publisher folder) in which Publisher will create the portlet folder.

3. Click **Next.** Publisher displays a message when it has created the portlet folder.

4. Click **Next** again to access the first Edit Objects page. There is a page for each object category (such as Main Page, Index, or News Article) defined in the portlet template.

   Note: You can navigate through the required Configure Portlet Wizard pages either by clicking **Next** after you have completed each page, or by clicking on the page name listed in the left-hand column of the wizard

5. Each Edit Objects page lists the content item, Data Entry Template, and Presentation Template for the object category. Object categories may not include all three object types. Click on an object name to link to the editor for that object (either the Content Item Editor, Data Entry Template Editor, or Presentation Template Editor), where you can modify the object definition.

   The Content Item Editor, Data Entry Template Editor, and Presentation Template Editor are described in their respective chapters in this guide.

   The editable object properties for each sample published content portlet template are described in "Editable Objects in Sample Published Content Portlet Templates" on page 6-8.

6. The Edit Objects pages are intended to provide all of the access a portlet creator needs to configure the portlet. If, however, you want to change the object categories and objects that are editable from the Edit Objects pages in the wizard, change the object that is designated as the portlet item (the content item that appears as the view or entry-point to the portlet on the portal page), or change community portlet customization rights, click **Advanced Settings** in the Configure Portlet Wizard to access the Advanced Portlet Settings page.

   Caution: Adding or removing objects requires a thorough understanding of the function of those objects in the portlet. We recommend that you create a new portlet template

for portlets that require a set of objects different from those available in existing portlet templates.

For more information about the Advanced Portlet Settings page, see the online help.

7. Click **Security** to access the Content Security page, where you can assign Publisher security for the portlet folder or the subfolder indicated in the portlet template. The default Publisher security for the portlet is defined in the portlet template that you are using. The Security button appears only if it is enabled for the portlet template.

   Note: You assign portal security for the portlet using ALI portal administration.

   For more information, see "Setting Publisher Security for Published Content Portlets" on page 6-13, "Assigning Users and Roles to Publisher Folders" on page 4-10, "Using the Advanced Settings Page" on page 11-4, and the *Administrator Guide for AquaLogic Interaction.*

8. Click **Workflow** to access the Folder Workflow Properties page, where you can assign a Workflow Definition to the portlet folder. The Workflow button appears only if it is enabled for the portlet template.

   For more information, see "Attaching Workflow to Folders" on page 12-6 and "Using the Advanced Settings Page" on page 11-4.

9. Click Finish. This saves the portlet in Publisher, publishes it, and returns you to the Portlet Editor in the ALI portal.

10. In the Portlet Editor, click Finish and save the portlet.

    Caution: Clicking Finish in the Configure Portlet Wizard does not save the portlet. You must also click Finish and save the portlet in the Portlet Editor. If you do not, the content items, Data Entry Templates, and Presentation Templates will be saved in Publisher and published to the web server, but the portlet will not be saved in the portal administration directory and will not be available for adding to My Pages or community pages.

Editable Objects in Sample Published Content Portlet Templates

This section describes the objects in each of the sample published content portlet templates that you can edit using the Configure Portlet Wizard.

Announcement

The Configure Portlet Wizard enables you to edit the announcement content item. To add permanent content (e.g., contact information) to the display, edit the associated Presentation Template. To modify the Data Entry Template or Presentation Template, use Publisher Explorer or add the templates to the Configure Portlet Wizard using the Advanced Portlet Settings page.

For more information on Content Item Editor, Presentation Template Editor, and Data Entry Template Editor, see Chapter 7, "Creating and Editing Content Items," Chapter 10, "Creating Presentation Templates," and Chapter 9, "Creating Data Entry Templates."

News

The News portlet template includes three object groups that contain editable objects:

- Main Page
- Index
- News Article

Main Page

A news portlet's main page displays a list of articles, which are themselves published content items.

For the Main Page content item, you can select the following options (note that some of these options affect the news article page and not the main page):

- **Include Edit** adds an edit button to the portlet's news article page that enables users to edit existing news articles.
- **Include Create** adds a create button to the main page of the portlet that enables users to create new news articles directly from the portlet.
- **Include Delete** adds a remove button to the portlet's news article page that enables users to delete news articles from the portlet.
- **Include Search** adds a field to the main page of the portlet that enables users to search for news articles within the portlet's folder.
- **Max Items** sets the number of news articles that appear on the portlet's main page.

All buttons are selected for inclusion by default. Access to the edit, create, delete, and search functions in the portlet depends on the portlet security settings.

You can also click the edit button next to the Presentation Template name to access the Presentation Template Editor, where you can edit the Presentation Template for the portlet.

Index

A news portlet's index page displays a secondary view that lists all available news articles.

You can modify the index page by clicking the edit button next to the content item, Data Entry Template, or Presentation Template name to access the appropriate editor.

News Article

A news article is a published content item that is made available through a news portlet. The title and abstract of the news article appear on the portlet's main page and index page; the article itself appears in the news article page. You can modify the news article page by clicking the edit button next to the content item, Data Entry Template, or Presentation Template name to access the appropriate editor.

For more information on Content Item Editor, Presentation Template Editor, and Data Entry Template Editor, see Chapter 7, "Creating and Editing Content Items," Chapter 10, "Creating Presentation Templates," and Chapter 9, "Creating Data Entry Templates."

Community Directory

The Community Directory portlet template includes the following object groups containing editable objects:

- Main Page
- Index
- Info Article
- Problem Article
- Howto Article
- Documents
- Breadcrumbs
- ArticleHeader
- Subfolders
- ArticleFooter

- Footers

Main Page

A Community Directory portlet's main page includes a list of articles and a list of folders that themselves contain folders or lists of articles. The main page can also include a search field and create buttons for creating new articles and folders.

You can modify the main page by clicking the **Edit** button next to the content item, Data Entry Template, or Presentation Template name to access the appropriate editor.

The Content Item Editor provides the following options for the Community Directory main page content item (note that some of these options affect the article pages and not the main page):

- **Include Edit** adds an edit button to the portlet's article pages that enables users to edit existing articles.
- **Include Create** adds two create buttons to the Main Page of the portlet that enable community members to create new folders and new articles directly from the portlet. It also adds create buttons to the Folder pages.
- **Include Search** adds a field to the main page of the portlet that enables users to search for articles within the portlet's folder. It also adds a search field to the Folder pages.

All buttons are selected for inclusion by default. Access to the edit, create, and search functions in the portlet depends on the portlet security settings.

Index

The Index lists the name, title, author, and last published date of articles in the Documents area on the Main Page and on the Folder page.

You can modify the index page by clicking the edit button next to the content item, Data Entry Template, or Presentation Template name to access the appropriate editor.

Info Article and HowTo Article

Info Article and HowTo Articles are each simple article types, enabling community members to enter a Name, Title, Summary long text field, and More Info long text field using the Content Item Editor.

You can modify the way the Content Item Editor presents these article types by clicking the edit button next to the Data Entry Template or Presentation Template name to access the appropriate editor.

Problem Article

Problem Articles enable community members to enter information about a problem and resolution, using Name, Title, Summary, Cause, Resolution, Problem Status, and More Information fields.

You can modify the way the Content Item Editor presents problem articles by clicking the edit button next to the Data Entry Template or Presentation Template name to access the appropriate editor.

Documents

The Documents object group includes the Presentation Template that determines the look and behavior of the Documents area on the main page. To modify the Documents area, click the edit button next to the Presentation Template name to access the editor.

Breadcrumbs

The Breadcrumbs object group includes the Presentation Template that determines the look and behavior of the breadcrumbs that appear on the Folder pages. To modify the breadcrumbs, click the edit button next to the Presentation Template name to access the Presentation Template Editor.

ArticleHeader

The ArticleHeader object group includes the Presentation Template that determines the look and behavior of the header for articles created through this portlet. To modify the article header, click the edit button next to the Presentation Template name to access the Presentation Template Editor.

Subfolders

The Subfolders object group includes the Presentation Template that determines how subfolders are listed on the main page of the portlet. To modify, click the edit button next to the Presentation Template name to access the Presentation Template Editor.

ArticleFooter

The ArticleFooter object group includes the Presentation Template that determines the look and behavior of the footer for articles created through this portlet. To modify the article footer, click the edit button next to the Presentation Template name to access the Presentation Template Editor.

Folders

The Folders object group includes the Presentation Template that determines the look and behavior of Folder pages in the portlet. To modify, click the edit button next to the Presentation Template name to access the Presentation Template Editor.

For more information on Content Item Editor, Presentation Template Editor, and Data Entry Template Editor, see Chapter 7, "Creating and Editing Content Items," Chapter 10, "Creating Presentation Templates," and Chapter 9, "Creating Data Entry Templates."

Setting Publisher Security for Published Content Portlets

This section discusses:

- Default Publisher folder security for published content portlets.
- Portal security mapping for published content portlets.

Default Publisher Folder Security for Published Content Portlets

The default Publisher folder security for published content portlets depends on the following factors:

- The Publisher security for the parent folder in which the portlet folder resides.
- The default Publisher security for the portlet folder and subfolders, as defined in the portlet template.

When a portlet template creator defines the default security for portlet folders and subfolders, he or she is defining the default portal security mapping, not the *explicit* Publisher folder security (the security settings that appear in the Users/Groups and Role columns on the Content Security page). If the portlet template specifies default security for a portlet folder, the security on that folder will consist of *both* of the following:

- The default mapped portal object security.
- The explicit Publisher security copied from the portlet folder's parent folder.

If there is no default Publisher security defined in the portlet template, then the portlet folder and any subfolders simply inherit their security—explicit and mapped—from the parent folder.

Depending on the portlet template, you can override the default or inherited Publisher security for a portlet folder or subfolder directly from the Configure Portlet Wizard by clicking the Security button and accessing the Content Security page. Which folder you access—the portlet folder or one of any subfolders it may have—depends on how the portlet template was set up. To

override the default Publisher security for any portlet folders or subfolders whose security you *cannot* access from the Configure Portlet Wizard, use Publisher Explorer.

For more information on setting up default Publisher folder security when you create published content portlet templates, see "Using the Advanced Settings Page" on page 11-4 and "Using the Portlet Security Page" on page 11-6.

Portal Security Mapping for Published Content Portlets

If you choose to override the inherited security for a Publisher folder, you can:

- Assign Publisher roles to users and groups explicitly.
- Map portal security access for a particular portal object (such as a portal community or portlet) to Publisher roles; that is, assign Publisher roles to all of the users and groups that have access to a particular portal object, depending on the level of that access.

Since the way portlet template creators set default Publisher security for portlet folders and subfolders is by mapping a portal object's security to those folders, it is important that the portlet template creator—and anyone overriding Publisher security defaults for a portlet folder and subfolders by adding or changing portal security mapping—consider carefully the portal object being mapped, along with the portal security on that object. When you map a portal object's security to a Publisher portlet folder or subfolder, we recommend that you select the *portlet* or the portlet's *community* as the portal object to map, since these objects are most likely to have the security assignments that should apply to the Publisher portlet folder and subfolders. We also recommend the following:

- Do not enable portlet creators to override the inherited or default Publisher security unless they are completely familiar with the portal security for the objects that they are likely to map to and they have the ability to change that security as needed.
- If portlet creators do override the default portal security mapping, they should view and, if necessary, modify the portal security for the mapped portlet object before performing the mapping on the Content Security page.

For more information, see "Setting Up Security" on page 4-5, "Using the Portlet Security Page" on page 11-6, and the *Administrator Guide for AquaLogic Interaction.*

Managing Published Content Portlet Folders

A portlet folder is a Publisher folder that acts as the container for a published content portlet, its content items, and its objects. The system uses the Publisher portlet folder to associate the Publisher published content portlet with the portlet administrative object in the portal. The portlet

folder also determines how the content is indexed in the search server (all content contained in a single portlet folder is indexed for the portlet, unless the content has been marked to be hidden from search).

Every published content portlet folder has a *portlet item.* The portlet item is the portlet's main content item—the one that appears as the view or entry-point to the portlet on the portal page. Some portlet items are stand-alone pages (such as the single content item in the Announcement portlet); some contain links to other published content items within the portlet (such as the Main Page content item in the sample News portlet).

In general, a portlet folder contains the objects that constitute one portlet. This is the case, for example, for all portlets that you create from the sample published content portlet templates. However, a one-to-one portlet-to-portlet folder relationship is not required. In some circumstances, you may do the following:

- Include multiple portlets within a single portlet folder.

  For example, you could create two portlets based on the sample News portlet template that are identical, except for having two different Main Page implementations: one that includes the Create, Search, and Edit buttons and one that does not, so that you can place one version on a community management portal page and another on a more generally-accessible community portal page for browsing users. You would create the first portlet from the sample News portlet template and include the Create, Edit, and Search buttons on the Main Page content item. You would then create a copy of the Main Page content item without buttons and use the Published Content web service to make it the portlet item of a second portal. The contents of any news articles in these two portlets will be identical, and a search will return the same values.

- Use no portlet folder at all for your portlet item.

  You can create a Published Content web service portlet that consists simply of a single content item. If you do not want the content item to be searchable, you do not need to include it in a portlet folder.

Creating and Editing Branding Portlets

Branding portlets enable you to customize the look and feel of experience definitions and communities in the ALI portal. Publisher delivers the following portlet templates for use in creating branding portlets:

- *Header:* enables you to create customized headers. A header portlet appears at the top of the page, in the portal's banner area.

- *Footer:* enables you to create customized footers. A footer portlet appears at the bottom of the page.
- *Content Canvas:* enables you to create a branding portlet that fills the space just below the banner.

You create and configure branding portlets from the portlet templates just as you do published content portlets, using the Portlet Editor and the Configure Portlet Wizard. For each portlet, you must enter the following in the Configure Portlet Wizard:

- Portlet folder name.
- Parent folder.
- Portal style (Header portlet only). This field determines the default header format, but you can modify it using the Rich Text Editor on the Edit Objects page.
- The content itself, using the Rich Text Editor in the long text field on the Edit Objects page. The Rich Text Editor enables you to format text and background colors, upload and insert images, add links, and insert HTML.

  To insert portal transformer tags, click the **Toggle** button to switch to the HTML text editor. Type the portal transformer tags into the HTML.

Note: To make Presentation Templates and Data Entry Templates available for editing directly from the Configure Portlet Wizard, use the Advanced Portlet Settings page.

For more information, see "Creating a New Published Content Portlet" on page 6-5 and the *Administrator Guide for AquaLogic Interaction.*

Creating and Editing Published Content Portlets Using the Published Content Web Service

By using the Published Content web service directly, instead of a portlet template, you can create portlets that display any existing content item within a portal page. For example, if you manage your company intranet or other web-based resources as content items in the Publisher, you can use the Published Content web service to create a portlet that displays these resources for use by community members.

When you create a portlet with the Published Content web service, the Configure Portlet Wizard does not automatically create a portlet folder, Data Entry Templates, and Presentation Templates as it does when you create published content portlets from portlet templates; the Publisher portlet folder, content item, and Presentation Template must already exist, and may not be associated

with any other published content portlet. Any content item that is not already associated with a published content portlet can be used as the basis for a portlet that you create this way. This includes file content items and images that have been uploaded to Publisher, as long as the item contains HTML and has been published.

When you create a portlet by using the Published Content web service directly, the Configure Portlet Wizard looks and acts differently than it does when you use it to create a published content portlet from a published content portlet template: the only selection that you make in the wizard is the choice of content item to be displayed in the portlet.

Creating Published Content Portlets Using the Published Content Web Service:

1. Create a content item with the information you want to include in the portlet and publish it. You can create a portlet using any published content item in the Publisher that is not already associated with a portlet.
2. Click Administration in the ALI portal.
3. Click on the appropriate administrative folder.
4. Click **Create Object** | **Portlet**. The Choose Portlet Template or Web Service dialog box appears.
5. Choose the **Published Content** web service**.** This launches the Portlet Editor.
6. In the Portlet Editor, click the **Edit** button next to **Configure this Portlet** to access the Configure Portlet Wizard in Publisher.
7. In the Configure Portlet Wizard, browse for and select the content item to be the portlet item.
8. (Optional) If you want to add object categories and objects to make them available for editing directly from the Configure Portlet Wizard, change the object that is designated as the portlet item, select the portlet folder (which is required to make the portlet searchable), or change community portlet customization rights, do the following:
   a. Click **Create and Edit** to make the **Advanced Settings** button available.
   b. Click **Advanced Settings** to open the Advanced Portlet Settings page, where you can perform these optional tasks.

   Caution: Adding or removing objects requires a thorough understanding of the function of those objects in the portlet.

For more information about the Advanced Portlet Settings page, see the online help.

9. (Optional) If you've added object categories and objects using the Advanced Portlet Settings page, you will see those object categories and objects available for editing when you return to the Configure Portlet Wizard. If you've designated a portlet folder, you will also be able to access the Content Security and Folder Workflow Properties pages, where you can set up security and workflow for the portlet.

   See "Configuring the Published Content Portlet with the Configure Portlet Wizard" on page 6-6.

10. Click **Finish** to publish the portlet and return to the Portlet Editor in the portal.

11. Click **Finish** in the Portlet Editor to save the portlet and make it available to the portal.

Deleting a Published Content Portlet

Published content portlets consist of a portlet object in the portal administration directory and a folder containing objects in the Publisher folder hierarchy. In order to completely delete the portlet, you must delete objects from both hierarchies. You can delete a published content portlet from Publisher in the following ways:

- Through the Publisher Explorer.
- Through the Configure Portlet Wizard.

See also Chapter 8, "Publishing and Expiring Content."

CHAPTER 7

Creating and Editing Content Items

In Publisher, web pages derive from content stored and referenced in *content items.* To create a web page, you create a content item. To change a web page, you edit its content item.

You can create content items in two ways:

- Importing a file that you have created elsewhere into Publisher (a *file content item).*
- Using the Content Item Editor within Publisher.

This chapter includes the following topics:

- Creating and Editing Content Items Using Content Item Editor
- Enabling Formatting Styles in the Content Item Editor
- Uploading and Managing File Content Items
- Copying, Moving, Renaming, and Deleting Content Items

Creating and Editing Content Items Using Content Item Editor

Content items that you create using the Content Item Editor are built on *Data Entry Templates*, which define the *properties* available for creating a content item. When you create or edit a content item from a Data Entry Template, these properties appear in the Content Item Editor as editable fields, such as text boxes, defined selection lists, fields for downloading files, boolean True/False radio buttons, and so forth.

When you have entered or selected values for the properties that make up a content item and saved it in the Content Item Editor, the content item becomes a page on the preview site, with its data structured according to the Data Entry Template and its appearance and format determined by its associated *Presentation Template.* When you publish the content item, it becomes a page on the web site or an object in the portal Knowledge Directory.

This section discusses how to:

- Access the Content Item Editor.
- Use the Content Item Editor.
- Insert and manage files and images using the Content Item Editor.

For more information on data entry and Presentation Templates, see:

- Chapter 9, "Creating Data Entry Templates."
- Chapter 10, "Creating Presentation Templates."

Accessing the Content Item Editor

You can access Content Item Editor from a number of places in Publisher, including the following:

- Publisher Explorer
- Content Submission portlet
- Work List Portlet
- Most Recently Used Content portlet
- Content Items in Workflow portlet
- Configure Portlet Wizard
- Workflow Assignment page
- Published content portlets that enable content creation

This section discusses how to access the Content Item Editor from the Content Submission portlet. For information about accessing Content Item Editor from other Publisher components, see the online help or component-specific documentation in this administrator guide.

Content Submission Portlet

The Content Submission portlet allows users in the Submitter role and above to submit content items to Publisher from a community page. Typically, the portal community manager selects Data Entry Templates for you to choose from, and each Data Entry Template is associated with a portlet. The associated portlet displays content items only after they have been published.

To create a new content item, click the **Create** icon to the right of the Data Entry Template on which you want to base your content item. This opens the Content Item Editor.

Content Submission Portlet Preferences

It is typically a community manager's responsibility to select the Data Entry Templates from which users can submit content using the Content Submission portlet. Any user in the Submitter role and above can perform the task.

To select Data Entry Templates:

1. From the portal community, click **My Communities | Edit this Community.**
2. Under **Edit Community Settings**, click **Portlet Preferences.**
3. In the Portlet Preferences area, click the **Edit** icon next to the Content Submission portlet. This accesses the **Content Submission - Community Preferences page** in Publisher**.**
4. To add a Data Entry Template, click **Select Templates.**
5. On the **Select Data Entry Templates** dialog box, select the templates you want to add.
6. Click **OK** to return to the Content Submission - Community Preferences page.
7. To change the order in which the templates appear in the Content Submission portlet, click the up and down arrows to the right of each template.
8. Click **OK** to save your changes.

Using the Content Item Editor

The Content Item Editor consists of an action bar and the following pages:

- Properties
- Content Notes
- Content Versions

- Publishing Information

Note: In the Submitter view of the Content Item Editor, the Content Item Editor is a single page containing editable property fields, with only the Preview button in the action bar, along with the Submit and Cancel buttons.

Action Bar

The action bar at the top of the Content Item Editor consists of a set of buttons that enable you to perform various actions on the content item. The buttons that appear depend on the user's role and the content item's checkout, publishing, and workflow status:

- **Check In:** Click to check a content item into Publisher. This saves your changes and stores an incremented version in Publisher. Checking in updated versions allows you to revert to the current version of the item or compare it against other versions. You can also save a content item without checking it in by clicking the **Save** button.
- **Check Out:** Click to open the content item for editing and create a new version. When the content item is checked out, other users cannot open it for editing. Only Folder Administrators and Administrators can override a checkout.
- **Undo Checkout:** Click to discard your changes, revert to the previous version of the content item, and make the content item available for others to edit.
- **Preview:** Click to preview a content item as it will appear when published to the Web. You can preview a content item while you are creating or editing it in Content Item Editor. The preview option is not available if the content item uses a page component Presentation Template; that is, a Presentation Template that is not set up to publish complete web pages.

  For more information on page component Presentation Templates, see "Using the Presentation Template Editor" on page 10-2.
- **Publish:** Click to publish the content item to the publishing target set on the Publishing Information page. Publish is available only to users in the Editor role and above, and only if the content item is in a publishable workflow activity or is not subject to workflow.
- **Submit for Approval:** Click to access the Submit for Approval page, where you can select workflow options and submit the content item to workflow. This button appears only if the content item is new and in a folder that has workflow attached. Clicking this button saves the content item (a message prompts you to accept the save) if you have not saved it already. Clicking Finish on the Submit for Approval page checks the content item into Publisher if you have not done so already.

If the content item has already been submitted to workflow, the Approve, Reject, Transfer, and Assignment Details buttons appear instead.

Note: In the Submitter view of the Content Item Editor, a Submit button appears in the upper right-hand corner of the editor instead of the Submit for Approval button. When the user clicks this button, the content item is automatically submitted to the first workflow activity in the workflow definition. The user does not see the Submit for Approval page.

- **Approve:** Click to access the Approve page, where you can approve the content item and move it to the next workflow activity. Clicking this button saves the content item (a message prompts you to accept the save) if you have not saved it already. Clicking Finish on the Approve page checks the content item into Publisher if you have not done so already.
- **Reject:** Click to access the Reject page, where you can approve the content item and send it back to the previous workflow activity. Clicking this button saves the content item (a message prompts you to accept the save) if you have not saved it already. Clicking Finish on the Reject page checks the content item into Publisher if you have not done so already.
- **Transfer:** Click to access the Transfer page, where you can transfer or delegate the workflow activity for the content item to another user. This button is only available if the workflow definition allows transfers or delegation. Clicking this button saves the content item (a message prompts you to accept the save) if you have not saved it already. Clicking Finish on the Transfer page checks the content item into Publisher if you have not done so already.
- **Assignment Detail:** Click to access the Workflow Assignments page, where you can view details about the workflow assignment for the content item, along with its workflow history.

For more information on workflow, see Chapter 12, “Using Workflow.”

Properties Page

The **Properties** page in the Content Item Editor consists of a set of editable fields, based on the associated Data Entry Template. The values that you enter on this page constitute the content item’s published content.

For a complete list of the property types that can appear in the Content Item Editor, see “Property Types Available for Data Entry Templates” on page 9-2.

For instructions on inserting files and images into content items using the Content Item Editor, see “Inserting and Managing Files and Images Using Content Item Editor” on page 7-8.

For more detailed instructions on using the features associated with these properties, see the online help.

Content Notes Page

The **Content Notes** page enables you to enter non-published information about the content item. Any note you enter is accessible through Content Item Editor, but does not appear in the published content item, is not included in the metadata for the content item, and is not searchable through Publisher. Only users in the Contributor role and above can access this page.

Content Versions Page

The **Content Versions** page displays each version of the current content item, including the version number, check-in date, user who saved the version, and the version comments entered by the user. If you are creating a new content item, no versions appear. Only users in the Contributor role and above can access this page.

Note: The current version appears at the top of the list and is marked "Active Version." Administrators and Producers can edit certain properties of a content item without checking out the content item, as long as the content item is not currently checked out by a different user. Edits performed in this manner are not added to the content item's version history.

The following actions are available:

- **Compare**: To review the differences between versions, select the versions you want to compare and click Compare. The Version Comparison page displays the content item properties for each version and highlights any differences.
- **Restore**: To revert the content item stored in Publisher to a previous version, select the appropriate version and click Restore. You must have the content item checked out to restore a previous version.
- **Version Events**: To display the events for a selected version of the content item, click the Version Events icon to the right of the version. The events are displayed in the Version Events area at the bottom of the page. Events that are listed here include workflow activities or prior publication history. For each event, the page displays the date, associated user, event type, and event description.
- **View archived version in Content Item Editor**: To view a previous version of the content item, click on the version number. This opens another Content Item Editor window that displays the property values in that version. Within that editor window, you can also click **Preview** to preview that version.

You cannot edit or publish archived versions. To publish a previous version of a content item, you must first restore it. The Publish button in the action bar applies only to the active version of the content item.

Publishing Information Page

Only users in the Editor role and above can access this page.

The Publishing Information page displays the content item's Data Entry Template, associated Presentation Template, and associated portlet, along with the following:

- **Publishable**: Indicates whether or not the content item can be published as a stand-alone page. Some content items must be referenced by other published content items.
- **Publishing Name**: Displays the file name that will be created on the publishing target when the item is published.

Only **Publishing Name** can be modified from this page. You must configure the other items through Publisher Explorer.

The **Action Bar** in the **Publishing Information** group box consists of a set of buttons that enable you to perform the following publishing actions for the content item:

- **Directory:** click to access the Publish to Knowledge Directory page, where you can create a link to the published content item in the portal Knowledge Directory.
- **Schedule:** click to access the Publishing Schedule page, where you can view the most recent scheduled publication date, create a new publication or expiration schedule, or edit the current schedule.
- **Set to Expire:** click to set the content item to expire immediately. Publisher deletes the published content files—including any files contained in the item's image or file properties—from the publishing target and the search index. Expired content remains in the Publisher directory but is unavailable for publishing unless you undo the expiration.
- **Undo Expiration:** click if the content item has been set to expire and you want to republish the item. Undoing expiration publishes the item to the publishing target.

For more information on publishing, including scheduling and expiration, see Chapter 8, "Publishing and Expiring Content."

Inserting and Managing Files and Images Using Content Item Editor

You can upload files into a content item if the Data Entry Template for the content item includes the File property type. If you have enabled the WebDAV WebEdit feature on your local computer, you can also edit uploaded files directly from Content Item Editor, in the file's native editor.

You can upload image files to a content item if the Data Entry Template for the content item includes the Image or Long Text property types.

This section discusses how to:

- Upload files into content items using Content Item Editor.
- Edit files using Content Item Editor.
- Upload and edit image files using Content Item Editor.
- Manage image files.
- Publish referenced files and images.

Uploading Files into Content Items Using Content Item Editor

To upload a file using the File property type in Content Item Editor:

1. In the File property group box, click **Upload.**
2. In the dialog box that opens, enter the file name or browse for the file and select it.
3. Click **OK.**

Editing Files Using Content Item Editor

If you have inserted a file into a content item using Content Item Editor, you can edit that file in either of two ways:

1. Download the file to your desktop and edit it using the editor of your choice:
   a. In the File property group box, click **Download.**
   b. Follow the directions in the dialog box that opens to initiate the download and select the destination.

c. Edit and save the file locally, using the editor of your choice.

d. Return to the Content Item Editor and upload the edited file.

e. Click **Save.**

2. Use WebEdit to edit the file in place, using the editor of your choice:

a. In the File property group box, click **WebEdit.**

b. The file opens in the editor it was last edited with; edit the item.

c. Save the file.

d. Return to the Content Item Editor.

e. Click **Save.**

Note: You must have enabled WebEdit for your client to use this feature. You must also use Internet Explorer 5 or higher.

For more information on WebEdit, see Chapter 5, "Using WebDAV."

Uploading and Editing Image Files Using Content Item Editor

You can upload an image file to a content item using Content Item Editor if the content item's Data Entry Template includes the Image property type or the Long Text property type.

To upload an image file to a content item with the Image property type:

1. In the Image property group box, click **Upload**.
2. In the dialog box that opens, enter the file name or browse for the file and select it.
3. Click **OK.** The file name appears in the group box, and the image file is saved to the same Publisher folder as the content item.
4. If you want to change the size of the image, enter new pixel values in the **Width** and **Height** fields. Click **Get Size** to update the Width and Height fields with the original file's values. The Presentation Template must use the appropriate tags to use the Width and Height attributes to format the image in the published content item.

To upload an image file to a content item using the Rich Text Editor with the Long Text property type:

1. In the formatting toolbar for the Long Text property, click the **Image Options** icon or click the down arrow next to the **Image Options** icon to view the drop-down list, from which you select **Upload Image**.
2. In the dialog box that opens, enter the file name or browse for the file and select it.
3. Click **OK.** The image appears in the Long Text property edit box, and a thumbnail of the image appears in the selection box at the bottom of the drop-down list.

Once you have uploaded an image file using the formatting toolbar in the Long Text property, the image file is saved in the same Publisher folder as the content item. If the content item is associated with a published content portlet, the image file is saved in the Images subfolder in the portlet folder. Every image saved in the content item's folder or Images subfolder appears as a thumbnail in the selection box at the bottom of the drop-down list, where it is available for insertion into the text box.

The **Image Options** drop-down list (which is also accessible if you right-click on an image in the text box) also provides the following options:

- **Link to Image | Web:** click to insert an image from outside Publisher into the text box without storing the image in Publisher; you enter a url to provide the link to the web site where the image is stored.
- **Link to Image | Select Image:** click to insert an image from any folder in Publisher that you have access to. You select the image using the Select Image dialog box.
- **Edit Image:** select an image in the Long Text property box and click Edit Image to open the Edit Image dialog box where you can modify the image attributes.
- All image files in the content items Publisher folder appear as thumbnails in the drop-down list. Insert in the text box by clicking on the thumbnail.

Managing Image Files

When you use the Upload Image options in the Long Text property in Content Item Editor to insert image files directly into a content item, the image files are stored as file content items in the same folder as the content item itself—or, in the case of published content portlets, in an Images subfolder in the portlet folder—both in the Publisher directory and in the web server directory. You might prefer, like most web designers, to store your image files separately from the HTML files on the web server; to do so, import the image file as a file content item through Publisher Explorer and place it in the directory of your choice, with a publishing target of your choice. You can then insert the image file into a content item by using the Item property or the Link to Image | Select Image option in the Long Text box's formatting bar in Content Item Editor.

For more information on uploading file content items to Publisher and assigning publishing targets, see "Uploading and Managing File Content Items" on page 7-13 and "Configuring Publishing Targets and Preview Sites" on page 4-14.

Publishing Referenced Files and Images

The way you upload or refer to files and images in a content item determines how these files and images are published to the web server. Consider the following:

- Any image that you upload using the Upload Image options in the Long Text property in Content Item Editor is saved in Publisher as a file content item and will automatically be published to the web server when you publish the content item, unless you are a Contributor or Submitter creating a content item through a published content portlet. When users in these non-publishing roles upload an image file this way, the image file is not published automatically with the content item; it must be published separately. Since all images uploaded in this way are stored in the Images subfolder of the portlet folder, a user in a publishing role can create a regular publishing schedule for the subfolder to publish all images submitted by non-publishing users.
- A file stored in a File or Image property in the content item will be published with the content item if the Presentation Template references it using the proper pcs tags**.**
- If your content item uses the Item or List property types to refer to file content items, you must publish those file content items separately or include the items in the Presentation Template's Related Items to Publish list.

Enabling Formatting Styles in the Content Item Editor

Users can apply external cascading style sheet styles -- using the Styles dropdown menu in the Rich Text Editor -- to text they have typed into the Content Item Editor. To enable this feature, you need to edit the **content.properties** file to point to the stylesheet that you want to use (you can either use your own stylesheet or the sample stylesheet delivered with Publisher).

In order for these styles to appear in published content items or Preview mode, you must edit the code of the appropriate presentation templates by adding references to the CSS stylesheet.

Adding CSS Stylesheet References to the Content.Properties File

To make the Styles dropdown menu available in the Rich Text Editor, you need to add a reference in the **content.properties** file to the CSS stylesheet that you want to use. You can point to either

your own stylesheet, or to the sample stylesheet delivered with Publisher. Additionally, you must provide a list of styles that you want to make available to users; this list populates the Styles drop-down menu.

1. Navigate to the **content.properties** file, located in ***install_dir*\ptcs\<version>\settings\config** .
2. Perform one of the following:
   - If you want to point to your own stylesheet: In the **LTCExternalStyleSheet** parameter, provide a URL that points to the CSS stylesheet that you want to use. For example:

     ```
     LTCExternalStyleSheet=http://localhost/publisherstylesheet.css
     ```

   - If you want to point to the sample stylesheet delivered with Publisher: Uncomment the **LTCExternalStyleSheet** parameter.
3. In the **LTCExternalStyleClasses** parameter, provide a comma-delimited list of styles from the CSS stylesheet that you chose to point to in the previous step. For example:

   ```
   LTCExternalStyleClasses=myheader,error,warning
   ```

   These styles will appear in the Styles dropdown menu.

Adding CSS Stylesheet References to Presentation Template Code

To make Rich Text Editor style formatting visible in published content items and in Preview mode, edit the code of each presentation template that will used to publish or preview content items. To each presentation template, add a reference to the CSS stylesheet that you chose to point to in "Adding CSS Stylesheet References to the Content.Properties File" on page 7-11 .

Note: If the stylesheet that you are using is located on a web server that is not accessible to the internet, you must add the stylesheet's URL to both the Published Content web service and Publisher Administration web service. Performing these steps allow the stylesheet to be gatewayed by the portal server.

Note:

Following is an example of adding CSS stylesheet references to presentation template code. The following code for the Announcement portlet does not include a reference to a CSS stylesheet:

```
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=UTF-8">

<pcs:if expr="false">NOTE: Just output the text value</pcs:if>

<pcs:value expr="text"></pcs:value>
```

The following code for the Announcement portlet includes a reference to a CSS stylesheet:

```
<META HTTP-EQUIV="Content-Type" CONTENT="text/html; charset=UTF-8">
<!-- This is where you should add the reference to the CSS stylesheet>-->
<link rel="stylesheet"
href="http://<server_name>/imageserver/stylesheets/editorStyles.css"
type="text/css">
<pcs:if expr="false">NOTE: Just output the text value</pcs:if>
<pcs:value expr="text"></pcs:value>
```

Uploading and Managing File Content Items

File content items are files that are created outside of Publisher and that you upload from a local or network drive to Publisher. You can manage file content items in Publisher and publish them to your publishing target through Publisher, without having to use the Content Item Editor.

This section discusses how to:

- Upload file content items.
- Edit and manage file content items using WebDAV.

Uploading File Content Items

There are two ways of uploading file content items to Publisher:

1. Uploading the file in Publisher Explorer using the **New | File Content Item** command. When you've uploaded the file, it is saved in the Publisher directory as a content item.
2. Uploading the file using the Map a Web Folder feature of the WebDAV client. This method enables you to upload any number of files to the Publisher directory simply by dragging and dropping or cutting and pasting in Windows Explorer.

Note: Images that you upload using the Rich Text Controls in a Long Text box in Content Item Editor are also saved to the Publisher directory as file content items.

The content item that the system creates when a file is uploaded includes the following properties (unless it is an image file):

- **File:** the value is the uploaded file.

- **Title**
- **Description**

For image files, the content item includes the following properties

- **Image**: the value is the uploaded image file.
- **Alt:** the value entered is used as mouse-over or “tooltip” text, or as text to replace the image if the web browser is set for low-bandwidth or accessible browsing.
- **Title**
- **Description**
- **Image Preview**

The Title, Description, and Alt properties have no values when the system creates the content items, but you can enter values.

Once the file is uploaded, you can treat the file content item just like any other content item, in terms of workflow and publishing.

Editing and Managing File Content Items Using WebDAV

If you have installed the WebDAV client and enabled the WebEdit and Map a Web Folder features, you can edit and manage file content items by doing the following:

- Using the WebEdit button in the File property in Content Item Editor to open the file in its native editor, where you can edit it.
- Using the Map a Web Folder feature to open the file from Windows Explorer in its native editor.
- Using the Map a Web Folder feature to copy, move, rename, or delete a file content item using Windows Explorer.

For more information about using WebDAV, see Chapter 5, “Using WebDAV.”

Copying, Moving, Renaming, and Deleting Content Items

You can copy, move, rename, and delete content items in Publisher Explorer, just as you do with any Publisher component. Note the following considerations, however, when performing these functions on content items:

- If you delete a content item that has been published, set the content item to expire first so that the published content is removed from the portal. If you do not expire published content items, users will still be able to access them.
- You can move a content item to a different folder without breaking references to other content items, Data Entry Templates, or Presentation Templates.
- When you rename a content item, the system automatically updates any references to that content item in Data Entry Templates and other content items. If there are any named references to the content item in Presentation Templates, however, you must update them manually.

CHAPTER 8

Publishing and Expiring Content

Publishing makes content items available to end users as web pages. Publisher enables you to:

- Publish content items to published content portlets, to the portal Knowledge Directory, or to an external web site.
- Publish a content item immediately or schedule it to be published at a later date.
- Preview a content item before publishing it to confirm layout and ensure that the Presentation Template is implemented correctly.

You can also publish content items to the portal Knowledge Directory using a Publisher crawler.

When you want to remove a published content item from the web server, you can set it to *expire.* This removes it from the web server but keeps it in the Publisher directory. You can set a published content item to expire immediately or schedule a future expiration.

This chapter provides an overview of publishing and includes the following topics:

- Publishing Content Items
- Setting Published Content Items to Expire

About Publishing

When you publish a content item, Publisher performs the following tasks:

- Formats the item according to its Presentation Template.

- Saves the formatted file to the web server directory specified in the publishing target assigned to the item's Publisher folder.
- Adds the item to the search index.
- Publishes the item to the portal Knowledge Directory, if you so choose.
- Publishes images or files included in the content item, if one of the following criteria is met:
  - The files are stored in a File or Image property in the content item, and the Presentation Template references them using the proper pcs tags.
  - If the file is an image file, it was uploaded using the Upload Image options in the Long Text property type.

    Note: When users in the Editor role and above upload an image file using the Upload Image options in the Long Text property type, the image file is automatically published when the content item is published. When users in a Submitter or Contributor role create a content item through a published content portlet and upload an image file this way, the image file is not published automatically with the content item; it must be published separately.
- Publishes any referenced content items in an Item or List property, if those items are included in the Presentation Template's Related Items to Publish list.
- Republishes any referenced published content items (as defined in the Presentation Template's Related Items to Publish list). For example, if you publish a new article in a news portlet, the index page and main page are republished to add the content item.

Note: File content items are published without being formatted by Presentation Templates, and independently publishable Presentation Templates are published without content items. The format of the published file content item is determined by the file content item itself, while the format of the published Presentation Template is determined by the Presentation Template itself, as defined in the Presentation Template Editor. The Publisher folder in both cases determines the publishing target (published file location accessed by the AquaLogic Interaction portal server or other web server).

For more information on Presentation Templates, see Chapter 10, "Creating Presentation Templates."

For more information on publishing targets, see "Configuring Publishing Targets and Preview Sites" on page 4-14.

For more information on file content items, see "Uploading and Managing File Content Items" on page 7-13.

For more information on managing image files in Publisher so that they are published correctly, see "Inserting and Managing Files and Images Using Content Item Editor" on page 7-8.

Publishing Content Items

This section provides an overview of publication requirements and discusses how to:

- Publish using Publisher Explorer.
- Publish using Content Item Editor.
- Schedule publishing and expiration.
- Publish to the Knowledge Directory using the Content Item Editor and Publisher.
- Publish to the Knowledge Directory using a Publisher crawler.
- Publishing to external web sites.

Publication Requirements

To publish a content item, you must meet the following requirements:

- There must be a publishing target configured for the content item's Publisher folder. A publishing target is the file location on the web server where the published content item will reside.

  For more information on configuring publishing targets, see "Configuring Publishing Targets and Preview Sites" on page 4-14.

- You must have an Editor role or higher for the Publisher folder.
- If the content item is in workflow, it must be in a workflow activity that allows publishing.
- If the content item's folder has workflow attached, but the content item has not been submitted to workflow, then the "Allow content items not in workflow to be published" option must be selected on the Folder Workflow Properties page for the folder.

  For more information on folder-level workflow options, see "Attaching Workflow to Folders" on page 12-6.

- The content item must use a Presentation Template that is set up to publish complete pages. No Presentation Template is required for file content items.

Publishing Using Publisher Explorer

Using **Publisher Explorer**, you can publish content items individually, by folder, or by selecting a batch.

To publish a content item:

1. Right-click the content item and click **Publish**.
2. Click **OK** in the confirmation box. A dialog appears and informs you when publication is complete.

To publish all content items in a folder:

1. Right-click the folder and click **Publish**.
2. Click **OK** in the confirmation box. A dialog appears and informs you when publication is complete or if there are exceptions.

To publish multiple consecutive content items or folders:

1. Click the icon of the first item or folder.
2. Press and hold the **Shift** key.
3. Click the icon of the last item or folder.
4. Right-click anywhere within the selection and click **Publish**.
5. Click **OK** in the confirmation box.

To publish multiple non-consecutive content items or folders:

1. Press and hold the **Ctrl** key.
2. Click the icon of each item or folder.
3. Right-click anywhere within the selection and click **Publish**.
4. Click **OK** in the confirmation box.

Publishing Using Content Item Editor

In the **Content Item Editor**, you can publish a content item that is in a publishable state by clicking **Publish** in the action bar.

You can also use the **Publishing Information** page in the Content Item Editor to change the file name of the published file, create a publishing schedule (through the Publishing Schedule page),

specify a portal Knowledge Directory folder to publish to (through the Publish to Directory page), and set the content item to expire or undo expiration.

For more information, see "Using the Content Item Editor" on page 7-3.

Scheduling Publishing and Expiration

You can create a publication and expiration schedule for a content item from the Content Item Editor and for a content item or folder from Publisher Explorer. In both cases you use the Publishing Schedule page to create the schedule.

To access the Publishing Schedule page from Publisher Explorer, right-click on the content item or folder and select **Schedule Publishing.**

To access the Publishing Schedule page from Content Item Editor:

1. Click **Information** under Publishing in the left-hand menu to access the Publishing Information page.
2. Click the **Schedule** button in the Publishing Information action bar.

To create or edit a publishing schedule using the Publishing Schedule page:

- Under **Next Scheduled Publishing**, choose a publishing option. You can schedule publishing to occur daily or weekly at a particular time, or you can schedule it for a particular date and time.
- To cancel a publication schedule, click **Not Scheduled**.

To create or edit an expiration schedule using the Publishing Schedule page:

- Under **Expiration,** select a date and time to set the content item to expire.
- To cancel an expiration schedule, click **Not Scheduled**.

Note: If you schedule publication for a folder, only those content items that have reached a publishable activity in workflow by the scheduled date will be published.

The Publishing Schedule page also displays the last time the content item or folder was published according to schedule.

For more information on expiration, see "Setting Published Content Items to Expire" on page 8-9.

Publishing Content Items to the Knowledge Directory Using the Content Item Editor or Publisher Explorer

You can create a link to a published content item in the portal Knowledge Directory by using the Publish to Knowledge Directory page. Content items that you publish to the portal Knowledge Directory are indexed and appear within the Knowledge Directory folder structure.

You can access the Publish to Knowledge Directory page from Publisher Explorer and Content Item Editor.

Caution: A content item published to the Knowledge Directory using the Publish to Knowledge Directory page is not deleted from the Knowledge Directory when you set the content item to expire; you must manually delete the document from the Knowledge Directory. To avoid having to delete expired content items manually from the Knowledge Directory, use a Publisher crawler to publish content items to the Knowledge Directory. You can configure a crawler to delete Knowledge Directory documents when their associated content items expire. For more information, see "Publishing Content Items to the Knowledge Directory Using the Publisher Crawler" on page 8-7.

To access the Publish to Knowledge Directory page from Publisher Explorer, right-click on a content item and select **Publish to Directory**.

To access it from Content Item Editor,

1. Click **Information** under Publishing in the left-hand menu to access the Publishing Information page.
2. Click the **Directory** button in the Publishing Information action bar.

To publish a content item to the Knowledge Directory using the Publish to Knowledge Directory page:

1. In the **Destination Folder** group box, click **Browse** to open the Add Folder dialog.
2. Select the target Knowledge Directory folder and click **OK.**

   You can select more than one Knowledge Directory folder; the content item will be published to each one.

   Note: Only the Knowledge Directory folders for which you have Edit or Admin access in portal security are available for selection. For more information on portal security, see the *Administrator Guide for AquaLogic Interaction.*

3. If you want to change the name that appears for the content item in the Knowledge Directory or add a description, select **Override Defaults** in the Document Properties group box and enter a Document Name and Document Description.

   If you do not override the default, Publisher automatically sets the name and summary description and updates this information in the Knowledge Directory each time the file is indexed. If you do override it, the name and description will always be the ones you enter here.

4. Click **Finish.**

   The published document must be approved by the portal administrator before it becomes accessible to portal users. If you have Admin access in portal security, the document is automatically approved.

Caution: In order to publish Publisher documents to the portal Knowledge Directory, the portal administrator must have installed the portal's Web Services Server (SOAP Server). For more information, see the *Installation Guide for AquaLogic Interaction.*

Publishing Content Items to the Knowledge Directory Using the Publisher Crawler

You can use the Publisher Crawler content source in the ALI portal to create crawlers that import content items in a Publisher folder into the portal Knowledge Directory. This is the recommended method of importing multiple content items to the Knowledge Directory. This is the only way to delete expired content items from the Knowledge Directory automatically.

Like any crawler, a Publish crawler must have an associated job. If you want the job to run automatically, you must configure the portal's Automation Service to do so.

To create a Publisher crawler:

1. Go to the **Administration** directory in the portal.
2. Open the appropriate administrative folder.
3. In the Create Object Menu, click **Crawler - Remote.**
4. In the Choose Content Source dialog box, select **Publisher Crawler** and click **OK.**
5. In the Content Crawler Editor, on the **Main Settings - Content Source: Publisher Crawler** page, select the following:
   - **Source Folder:** the Publisher folder whose content items you want to publish to the Knowledge Directory.

The folders you see and can select are determined by your role.

- **Destination Folders:** the Knowledge Directory folders to which you want to publish the content items.
- **Mirror the source folder structure:** Select to have the Knowledge Directory folder structure repeat exactly the hierarchy of the source Publisher folder.

  Note: This is the recommended setting, since it enables you to create a crawler that sets all of the crawled files to expire, if the need should arise.
- **Apply Filter of Destination Folder:** Select to import only the content items that pass the filtering rules assigned to the Knowledge Directory folders. Available only if you did not select mirroring.
- **Import security with each document:** Select to pass the security rules for the Publisher folders to the destination folders.
- **Document Access Privileges:** Specify the access rights for the imported documents.

For more information about the options available on this page, see the AquaLogic Interaction online help.

6. On the **Crawl Options** page, select the maximum number of levels of the Publisher folder hierarchy you want to crawl into the Knowledge Directory.

   You can also select whether you want to publish content items that have not yet been published.

7. On the **Document Settings** page, specify how documents should be expired and refreshed when you run the crawler.

   You can use the **Document Expiration** settings, along with the select **Apply these settings to existing documents created by this crawler** option, to delete all documents previously crawled by this crawler.

   For more information about the Document Settings page, see the AquaLogic Interaction online help.

8. On the **Content Type** page, specify how content types should be assigned to the documents imported into the Knowledge Directory.

   For more information about content types, see the *Administrator Guide for AquaLogic Interaction* or the AquaLogic Interaction online help.

9. On the **Advanced Settings** page, select settings for content language, handling of documents rejected by the crawler, handling of documents previously crawled into the Knowledge Directory, and runtime configuration.

For more information about advanced crawler settings, see the AquaLogic Interaction online help.

10. On the **Set Job** page, assign or create a job to run this crawler.

    You must also register the job with the Automation Service.

    For more information about setting up crawler jobs, see the *Administrator Guide for the AquaLogic Interaction* or the AquaLogic Interaction online help.

Publishing to External Web Sites

You can publish content items to any web server that is accessible to Publisher over the network or Internet.

To publish content items to an external web site, the administrator must configure the publishing target to the site location. For details on configuring the publishing target, see "Configuring Publishing Targets and Preview Sites" on page 4-14.

Setting Published Content Items to Expire

This section provides an overview of expiration and discusses how to:

- Set a content item to expire.
- Undo expiration.

About Expiration

When you set a content item to expire, Publisher removes the published content files—along with any image files and file properties published with it—from the publishing target. It also removes the content item from the portal Knowledge Directory and the portal search index. Users cannot view an expired content item from the portal or retrieve search results for an expired content item. The content item itself, however, is not deleted from Publisher; it is simply removed from publication.

You can set the expiration of a folder and its entire contents, including the subfolders.

Note: You must have a Publisher role of Editor or higher to set a content item or folder to expire and undo expiration.

When you set a content item to expire, Publisher also launches the following events:

- Republishes any content items that are related to the expired content items (as defined in the content item's Presentation Template). For example, if you set a news article to expire, Publisher republishes the index and main page content items. The expired item no longer appears in the index and the main page.
- Cancels any scheduled publication tasks for the expired items.
- If the expired content item's Data Entry Template specifies auto-insertion into another content item's list property, Publisher removes the expired content item from that list.

Caution: If you published a content item to the Knowledge Directory using the Publish to Knowledge Directory page (from Publisher Explorer or the Content Item Editor), those documents will not be removed from the Knowledge Directory when you set the content item to expire. To avoid having to delete expired content items manually from the Knowledge Directory, use a Publisher crawler to publish content items to the Knowledge Directory. You can configure a crawler to delete Knowledge Directory documents when their associated content items expire. For more information, see "Publishing Content Items to the Knowledge Directory Using the Publisher Crawler" on page 8-7.

Setting a Content Item to Expire

Publisher provides the following ways of expiring content:

- Set a published content item or folder to expire immediately from Publisher Explorer.
- Set a published content item to expire immediately from Content Item Editor.
- Create an expiration schedule for a content item using the Publishing Schedule page.

To set a folder or content item to expire immediately from Publisher Explorer:

1. In the Publisher Explorer table pane, right-click the folder or content item and click **Set to Expire**.

   You can set multiple content items or folders to expire by using the Shift or Ctrl keys.

2. Click **OK.**
3. Click **Close.**

   The table pane will display the Expired icon in the Status column to indicate that the content item has expired.

To set a published content item to expire using Content Item Editor:

1. Click **Information** under Publishing in the left-hand menu to access the Publishing Information page.
2. Click the **Set to Expire** button in the Publishing Information action bar.
3. Click **OK** in the confirmation box.
4. The Set to Expire button changes to **Undo Expiration** to indicate that the content item has expired.
5. Click **Finish.**

For information about how to create an expiration schedule for a content item, see "Scheduling Publishing and Expiration" on page 8-5

Undoing Expiration

To publish an expired content item, you must undo the expiration first. When you undo expiration, Publisher launches the following events:

- Automatically publishes the content item and republishes all related content items. If you undo expiration for a news article, for example, the article reappears in the news portlet's index and main page.
- Adds the content item to the search index.
- If the Data Entry Template of the content item specifies automatic insertion into another content item's list property, Publisher adds the previously expired content item back to that list.

Note: Undoing expiration does not republish to the portal Knowledge Directory. You must republish to the Knowledge Directory separately, using the Publish to Knowledge Directory page.

You can undo expiration for a content item using Publisher Explorer or Content Item Editor.

To undo expiration using Publisher Explorer:

1. In the Publisher Explorer table pane, right-click the folder or content item and click **Undo Expiration.**

   You can undo expiration for multiple content items or folders by using the Shift or Ctrl keys.

2. Click **OK.**

3. Click **Close.**

   The table pane will display the Published icon in the Status column to indicate that the content item has been republished.

To undo expiration using Content Item Editor:

1. Click **Information** under Publishing in the left-hand menu to access the Publishing Information page.
2. Click the **Undo Expiration** button in the Publishing Information action bar.
3. Click **OK** in the confirmation box.
4. The Undo Expiration button changes to **Set to Expire** to indicate that the content item has expired. The Publish button in the action bar also becomes active.
5. Click **Finish.**

CHAPTER 9

Creating Data Entry Templates

Data Entry Templates consist of properties that define the fields available for creating a content item. When you create or edit a content item from a Data Entry Template, these properties appear in the Content Item Editor as editable fields, such as text boxes, selection lists, fields for downloading files, boolean True/False radio buttons, and so forth. When you publish the content item, Publisher uses an associated Presentation Template to define how the property values are displayed to the end user.

Users in the Producer role and above can create and configure Data Entry Templates.

This chapter provides an overview of Data Entry Templates and discusses how to create and edit Data Entry Templates.

About Data Entry Templates

This section provides an overview and includes the following topics:

- Property Types Available for Data Entry Templates
- Sample Data Entry Templates

Overview

The pages composing a web site typically fall into just a few categories. Even a large e-commerce site, with hundreds of web pages, typically groups them into a home page and a small number of categories, such as catalog listings, weekly specials, news releases, job postings, and so forth.

web pages within each category have identical design and similar content. One job posting, for example, looks like another job posting and contains similar kinds of information.

You can create a Data Entry Template for each category of web page: for example, a Data Entry Template for catalog listings, another for job postings, and so on. In each Data Entry Template, you specify the kinds of information that will appear on all web pages in that category; later, contributors use these Data Entry Templates to create content items and enter content for web pages.

To create Data Entry Templates, you assemble properties—one property for each variable component of a web page. In a Data Entry Template for job postings, for example, you might include properties for job title, hiring manager, responsibilities, qualifications, salary range, and start date.

When you create a property, you assign a property type to specify the kind of information the property should hold: text, long text, integer, date, item (a reference to another content item), image, file, list, selection list, real, and Boolean.

A Data Entry Template for job postings, for example, might include these properties and types:

Table 9-1 Example: Data Entry Template Properties and Types (Job Posting)

Property Name	Property Type
Job Title	Text
Responsibilities	Long Text
Qualifications	Long Text
Hiring Manager	Selection List
Salary Range	Selection List or Text
Start Date	Date

Property Types Available for Data Entry Templates

The following property types are available for creating Data Entry Template properties:

- Text
- Long Text

- Integer
- Date
- Item
- List
- Image
- File
- Selection List
- Real
- Boolean

This section describes each property type and its uses.

Text

Enables users to enter plain text. You can limit the entry length to anything below 255 plain-text characters.

The example below also displays the red asterisk associated with a required field. Data Entry Template Editor enables you to configure any property as a required one.

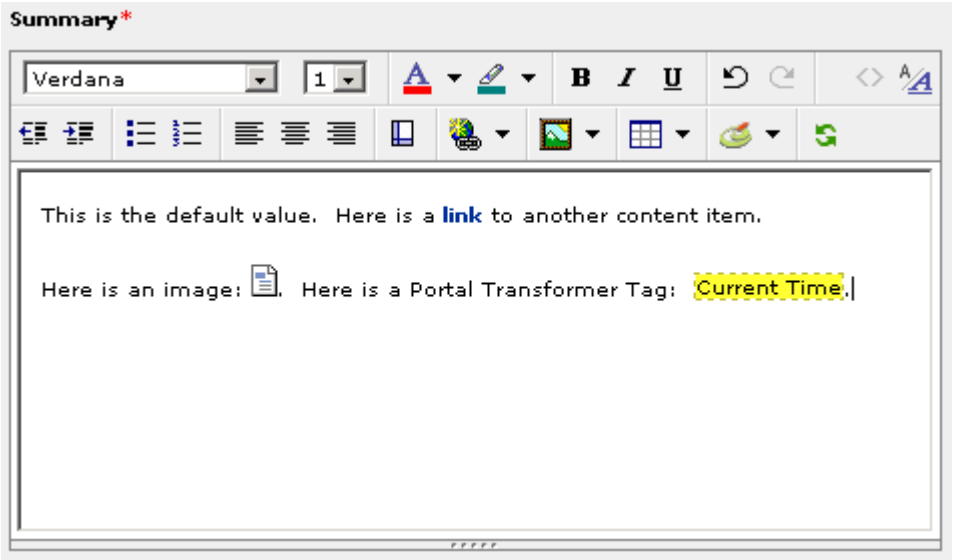
Figure 9-1 Text property type field as it appears in Content Item Editor

Long Text

Provides a Rich Text Editor that enables users to enter formatted text, images, tables, numbered or bulleted lists, hyperlinks, and HTML. You can also specify that the text box allow plain text entry only. You can limit the entry length if you use the plain text option.

To insert portal transformer tags, click the **Toggle** button to switch to the HTML text editor. Type the portal transformer tags into the HTML.

Figure 9-2 Long Text property type field as it appears in Content Item Editor



Note: In Netscape browsers, this field appears as a simple long text field, into which users can enter text and HTML formatting tags.

Integer

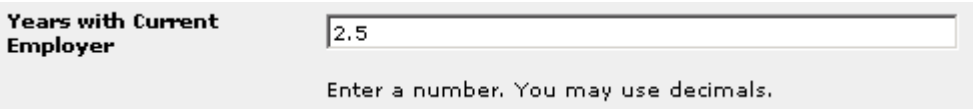
Enables users to enter a whole number (integer). If a user enters text, an "invalid entry" error occurs. You might want to add instructions to help users understand that they must enter a whole number.

Figure 9-3 Integer property type field as it appears in Content Item Editor

Real

Enables users to enter a whole number or fraction in decimal form. If a user enters text, an "invalid entry" error occurs. You might want to add instructions to help users understand that they must enter a number.

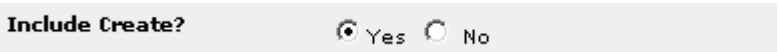
Figure 9-4 Real property type field as it appears in Content Item Editor



Boolean

Enables users to answer a yes/no or true/false question.

Figure 9-5 Boolean property type field as it appears in Content Item Editor



Date

Enables users to enter a date or select it from a pop-up calendar control and choose a time from a drop-down list.

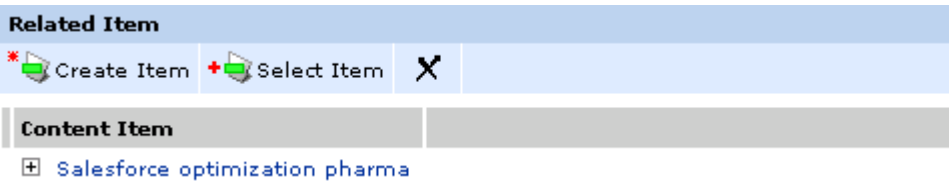
Figure 9-6 Date property type field as it appears in Content Item Editor

Item

Enables users to create a new content item or select an existing content item that will appear within the content item created from the Data Entry Template. The Item property is a reference to any content item in the Publisher. The Presentation Template can use this property to access the properties of the referenced item, create a link to the referenced item, or insert the referenced item's published contents into the body of the item being published.

Users can open the content item in a new Content Item Editor window by clicking on it or view the item's content in the lines immediately below the item name by clicking the + next to the item.

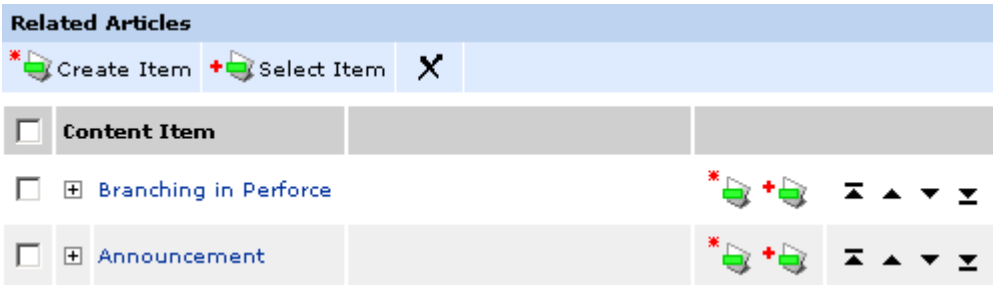
Figure 9-7 Item property type field as it appears in Content Item Editor



List

Enables users to add multiple content items to the content item created from the Data Entry Template. The published content item displays the items in the list in the same order in which you list them in the Content Item Editor; the up and down arrows on the right allow you to rearrange the order of the list. If you create a new item using the Create Item button in the toolbar, you are prompted to select a Data Entry Template first; if you create a new item using the Create Item icon to the right of an item already in the list, the item uses the same Data Entry Template as the listed item.

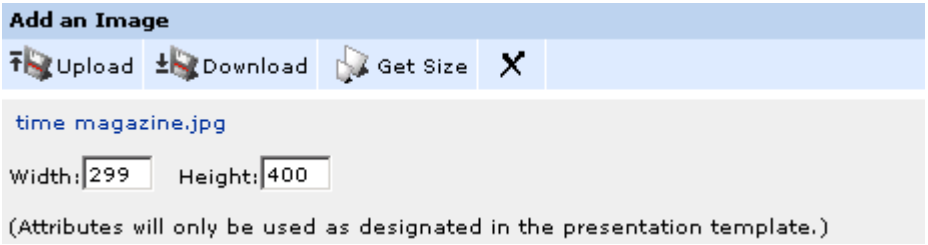
Figure 9-8 List property type field as it appears in Content Item Editor



Image

Enables users to upload an image from a local or shared network drive.

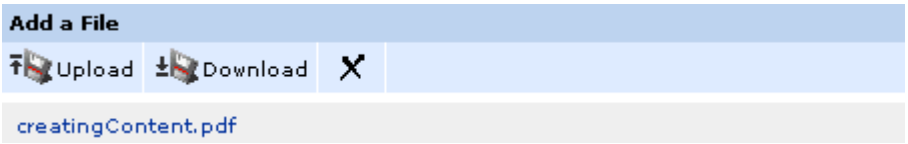
Figure 9-9 Image property type field as it appears in Content Item Editor



File

Enables users to upload a file from a local or shared network drive.

Figure 9-10 File property type field as it appears in Content Item Editor



Selection List

Selection lists limit fields to specific entries. You define the list of static entries from which users can choose. A selection list ensures uniformity and eliminates the chance of misspellings. By ensuring uniform data in a contributor's input, a Presentation Template writer can confidently use the value of a property to include content conditionally while publishing.

A selection list must exist before you can add it to a Data Entry Template. You create selection lists using the Selection List page. Selection lists may be shared between Data Entry Templates. In the Data Entry Template Editor, you can specify whether users can select more than one item.

Figure 9-11 Selection List property type field as it appears in Content Item Editor

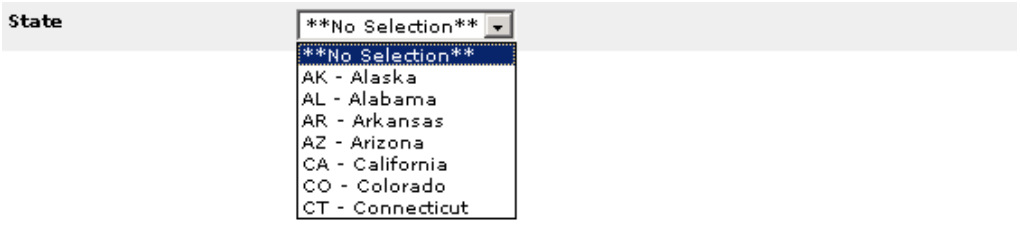


Figure 9-12 Selection List property type field allowing multiple selections

Defining Selection Lists

To define a selection list:

1. Open Publisher Explorer and navigate to the folder in which you want to create a Selection List.
2. Click **New** | **Selection List** to open the Selection List page.

3. Enter a **Name** to identify the selection list. Use a name that makes clear the type of data included in the list.
4. Enter your selection list values. Each entry is limited to 255 characters.

   You can change the order of values using the icons to the right of the value name.
5. When you are finished, click **Save** and **Close.**

Sample Data Entry Templates

Publisher provides sample content portlet templates that you can use to create published content portlets or branding portlets using the Portlet Editor and the Configure Portlet Wizard. These portlet templates include Data Entry Templates that the system automatically copies when you create a new published content or branding portlet. You can use these Data Entry Templates as they are or customize them to fit your organization's particular terminology or content collection needs. The table below lists the Data Entry Templates provided with each sample portlet template, along with their property fields:

Table 9-2 Sample Data Entry Templates by Portlet Type

Portlet Type	Data Entry Templates: Property fields
Announcement	**Announcement**: announcement (long text)
Community Directory	**Howto Article**: title (text), summary (long text), info (long text), hidden (boolean) **Index**: hidden (boolean) **Info Article**: title (text), summary (long text), info (long text), hidden (boolean) **Main Page**: edit (boolean), create (boolean), delete (boolean), search (boolean) **Problem Article**: title (text), summary (long text), cause (long text), resolution (long text), problem (long text), info (long text), hidden (boolean)
News	**Index**: items (list) **Main Page**: edit (boolean), create (boolean), delete (boolean), search (boolean), maxitems (integer) **News Article**: headline (text), abstract (text), body (long text), hidden (boolean)
Content Canvas	**Content Canvas:** text (long text)
Header	**Header:** text (long text)
Footer	**Footer:** text (long text)

All of the above also include the **Name** property.

Creating and Editing Data Entry Templates

To create new Data Entry Templates and configure the sample Data Entry Templates, you use the Data Entry Template Editor. This section discusses how to:

- Launch the Data Entry Template Editor.
- Use the Data Entry Template Editor.
- Copy, move, rename, and delete Data Entry Templates.

Note: The easiest way to learn how Data Entry Templates work is to configure a sample Data Entry Template when you create a published content portlet. For more information about creating and configuring published content portlets from sample templates, see Chapter 6, "Creating Published Content Portlets."

Launching the Data Entry Template Editor

You can open the Data Entry Template Editor from Publisher Explorer, the Configure Portlet Wizard, and the Presentation Template Editor. Only Publisher Explorer enables you to open the Data Entry Template Editor both to create a new template and to edit an existing template; the others enable you only to edit existing templates.

To open the Data Entry Template Editor from Publisher Explorer, perform one of the following actions:

- Click **New** | **Data Entry Template**.
- Right-click in the Publisher Explorer right pane and choose **New** | **Data Entry Template**.
- Right-click an existing Data Entry Template and choose **Edit Data Entry Template.**

To open the Data Entry Template Editor from the Configure Portlet Wizard on any Edit Objects page for an object category that includes a Data Entry Template, click **Edit** next to the template name.

To open the Data Entry Template Editor from the Presentation Template Editor, click the Data Entry Template name in the **Data Entry Template** field.

Using the Data Entry Template Editor

To create or edit a Data Entry Template in the Data Entry Template Editor:

- Enter a unique **Name** for your Data Entry Template. You cannot use a Data Entry Template name that is already in use in the same folder.
- View the **Presentation Template** and **Publishable** fields. These fields are determined by the Presentation Template that you associate with the Data Entry Template. These fields are blank if you are creating a new Data Entry Template. They are populated after you save the Data Entry Template and associate it with a Presentation Template using the Presentation Template Editor.
- If you want the Content Item Editor to display instructions for users who are creating content items from this Data Entry Template, enter the instructions in the **Instructions** text box. You can format your instructions using a rich text editor.
- On the **Advanced** tab of the Configure Property page, you can set the default value for a property, set the property as a document property, and map it to a portal property.
- You can configure Publisher automatically to insert the content items created with this Data Entry Template into a List property in another content item. For example, in portlets created from the sample News Portlet template, when a user creates a content item from the News Article Data Entry Template, that content item is inserted into the Items property of the Index content item. To accomplish this automatic insertion:

  a. In the **Insert items into this list** group box, click **Select Item**.

  b. In the Select Content Item dialog box, select the content item into which Publisher will insert list entries. Click **OK**.

  c. Choose the **List** to which Publisher will add entries.

  Note: If you use automatic insertion, add a note to the List property in the corresponding Data Entry Template to inform users of the source of the content items and to let them know that they do not need to add new entries manually. For example, you might include the note, “This List property automatically includes all new content items created from the <Template_name> Data Entry Template.”

- Add properties for each type of content you want captured by the content items created from the Data Entry Template.

  For more information, see “Adding Properties” on page 9-11.

- When you are finished, click **Save** and **Close**.

Note: The Data Entry Template must be attached to a Presentation Template before you can publish any content items created from it. To attach a Data Entry Template, use the Presentation Template Editor.

Adding Properties

In the Data Entry Template Editor, under **Properties**, create a property for each type of content you want captured by the content items that use the Data Entry Template. You can also enter default values for each property. While these defaults are not required, the example they provide can help users who are creating content items from the template.

To add a property:

1. Click **Add Property** to access the Configure Property page.
2. On the **General** tab, do the following:
   - Enter a **Name** for the property. All properties must have a name.

     Caution: If you change a property name in the Data Entry Template, you must also change any references to the property name in the associated Presentation Template.
   - If you want the property name that is displayed in Content Item Editor to differ from the name you entered above, enter a **Display Name.**
   - Select the property type from the **Type** list.

     For information on each property type, see "Property Types Available for Data Entry Templates" on page 9-2.
   - If you select a **Text** property type, you can use the **Maximum Length** field to set a maximum number of characters enterable in the text box. The limit is 255 characters.
   - If you select a **Long Text** property type, select whether you want users to edit text with a **Rich Text** editor or with a **Plain Text** editor.
   - If you select a **Selection List** property type, you must choose an existing Selection List. The **Select Selection List** dialog box opens when you select Selection List from the Type list.
   - If you want the property to be required for checking in a content item, select **Require value to check in.** Publisher displays an error in the Content Item Editor if a user tries to check the item in without entering a value in the field.
   - If you want the property to be required for publishing in a content item, select **Require value to publish.** Publisher displays an error in the Content Item Editor if a user tries to publish the item without entering a value in the field.

- If you want the Content Item Editor to display instructions for using the property, enter the instructions in the **Instructions** text box. You can format your instructions using a rich text editor.

3. You can set the default value for a property, set the property as a document property, and map it to a portal property on the **Advanced** tab.
   - You can define the default value of the data item. This value appears in the data entry field and can be seen by Contributors (or users with higher roles) when they create or edit content items derived from this Data Entry Template.
   - You can map a content item property to a portal property, and by associating the properties defined in the Data Entry Template with portal properties, those properties are indexed in the Search Server when content items created from the Data Entry Template are published (if associated with a portlet). This allows users to use Advanced Search to query for content items by specifying the portal property in the search criteria.
     To select the Portal Property used by Search Server to index the property, do the following:

     a. Click **Select**.
     b. In the dialog, choose a portal property or search and find a property.
     c. Click **OK**.
   - You can choose **Set as Document Property** if you want this property to be set as a document property when content items created from the Data Entry Template are published to or crawled into the Knowledge Directory. The Publisher attempts to find an attribute with the same name as this property in the portal's Global Document Property Map or in the document type identifier specified in this Data Entry Template.
4. When you are finished configuring a property, click **Finish** to return to the main page of the Data Entry Template Editor.
5. Each added property is listed in the **Properties** grid, including the property name, display name, property type, and required status. To move a property up or down in the list, use the **Actions** arrows at the right of each row. The list order in the Data Entry Template determines the display order in the Content Item Editor.

Copying, Moving, Renaming, and Deleting Data Entry Templates

You can copy, move, rename, and delete Data Entry Templates in Publisher Explorer, just as you do with any Publisher component. Note the following considerations, however, when performing these functions on Data Entry Templates:

- When you copy a Data Entry Template and you want to preserve its association with its content items, copy the content items and the Data Entry Template simultaneously. Either copy the entire folder that contains the Data Entry Template and content items or multi-select and copy the Data Entry Template and content items. If you copy the Data Entry Template to a new folder and then copy content items into that folder, the copied content items will retain their association with the original Data Entry Template and will have no automatic association with the copy.
- If a content item includes an Item property that references a second content item and you copy both of those content items simultaneously, then the item reference in the copy of the first content item refers to the copy of the second content item. The same is true for Presentation Templates that refer to Data Entry Templates. If you do not copy them simultaneously, the reference will be to the original.
- You can move a Data Entry Template to another location without affecting content items that have been created from that Data Entry Template.

Caution: Deleting a Data Entry Template deletes all content items created from it. There is no undo.

CHAPTER 10

Creating Presentation Templates

Publisher uses *Presentation Templates* to define how a content item is formatted and displayed when it is published. A Data Entry Template defines the properties that make up a structured content item and determines the types of data that users can enter in the Content Item Editor to create a content item. When the content item is previewed or published, a Presentation Template is used to format that data for display. Presentation Templates can include basic formatting, images, and standard boilerplate text, as well as programming logic to display information based on the value of specific content item properties. A Presentation Template is a text file that includes XML-like tags that are replaced with content from the Publisher. A Presentation Template can output any type of text file, including a Java source file, an html file, or a Cascading Style Sheet file.

You can also create a stand-alone Presentation Template that is publishable without a content item or Data Entry Template. This is useful when you want to create a simple single-page portlet that lists links to content items.

Producers or Administrators are responsible for creating Presentation Templates and attaching them to the associated Data Entry Templates. You must have one of these roles to create and edit Presentation Templates.

This chapter includes the following topics:

- Creating and Editing Presentation Templates
- Presentation Template Code
- Using Tag Helper to Write Presentation Template Code

- Using CSS and JavaScript Files
- Presentation Template Tools

Creating and Editing Presentation Templates

You can create new Presentation Templates or edit one of the default Presentation Templates, included with the sample portlet templates, to fit your company terminology or content collection needs. You use the Presentation Template Editor to create and edit Presentation Templates.

The Presentation Template Editor has slightly different display modes, depending on whether you are creating a Presentation Template for the first time, editing a normal Presentation Template, or editing an independently publishable Presentation Template.

This section discusses how to:

- Use the Presentation Template Editor.
- Use a WYSIWYG editor to create Presentation Template code.
- Create independently publishable Presentation Templates.
- Copy, move, rename, and delete Presentation Templates.

Using the Presentation Template Editor

To launch the Presentation Template Editor, perform one of the following actions in Publisher Explorer:

- Click **New** | **Presentation Template**.
- Right-click in the right pane and choose **New** | **Presentation Template**.
- Right-click an existing Presentation Template and choose **Edit Presentation Template**. When you publish an existing Data Entry Template it will pick up the changes to a Presentation Template. Data Entry Templates must be republished to display the change.

You can also access the Presentation Template Editor from the Configure Portlet Wizard and the Configure Portlet Template Wizard.

The **Presentation Template Editor** includes the following fields:

- **Name**: The template name. This name does not have to match the associated Data Entry Template.

Note: Renaming an existing Presentation Template does not remove its association with its attached Data Entry Template. If you rename a Presentation Template that is referenced in other Presentation Templates, you must also change the name in those references.

- **Publishing Name:** This field appears only when you are creating a new Presentation Template or editing an independently publishable Presentation Template. Use it only when you want to create or edit a publishable Presentation Template. The name you enter here, plus the .html extension, becomes the file name that is created on the web server when you publish the Presentation Template.

  If you *do not* want to create a publishable Presentation Template, ignore this field and select a Data Entry Template to attach to the Presentation Template. This field is then replaced by the Extension field.

- **Extension**: The extension (file type) for the file that will be created when the content item is published. You can use any extension that is valid for a basic text file (.html, .js, .jsp, .asp, .xml, .txt). If you do not enter an extension, the system uses .html.

- **Data Entry Template**: The Data Entry Template associated with the Presentation Template. Content items created with the selected Data Entry Template will be formatted using the current Presentation Template when they are published.

  Do *not* attach a Data Entry Template if you are creating an independently publishable Presentation Template.

  When you detach a data entry template from a presentation template, you will break the association between the data entry template and the presentation template, which may cause the portlet to fail.

- **Publishable**: For normal Presentation Templates, this field determines whether or not the Presentation Template can be used on its own to publish a content item as a web page or if it must be referenced by another Presentation Template. Select from:

  – **Complete Page**: The template can be used on its own to publish a content item as a web page.

  – **Page Component**: The template can be used only as a component that is referenced by other Presentation Templates. Typical page component Presentation Templates include header or footer templates.

  If you are creating or editing an independently publishable Presentation Template, you must select Complete Page.

  Note: Do not confuse Complete Page Presentation Templates with independently publishable Presentation Templates. While an independently publishable

Presentation Template must be a Complete Page template, a Complete Page template is not necessarily an independently publishable Presentation Template. The Complete Page designation simply means that the Presentation Template does not have to be referenced by another Presentation Template in order to be used to publish a content item.

For more information on referencing Page Component Presentation Templates in another Presentation Template, see "Include Element <pcs:include>" on page 10-12.

- **Exclude from Search**: Prevents users from using the Search feature to locate published content. Published content items created from the associated Data Entry Template will not be indexed by the Search Server, preventing them from being returned in a search.
- **Related Items to Publish**: If there are other content items that must be published when a content item created with this Presentation Template is published, specify them here. For example, when you publish a News article, you must also publish the Index to display the new article.

  Note: You cannot add related items to Page Component Presentation Templates because Page Components are published only as part of a page.

- **Code**: The programming logic for the template is contained in this text field. The text in the Code field can include any code that is valid for the file type specified in the Extension field. To reference Publisher objects, you must use Publisher tags (covered later in this chapter). You can enter code in a Presentation Template in two ways:
  - Enter the text manually by typing or pasting in the Code field.
  - Upload an existing text-based file from your local drive, using the **Upload** button.

  You can use the WYSIWYG editor of your choice to create and edit template code before uploading the file or copying and pasting the code into the Code field.

  Use the **Tag Helper** to help you create Publisher (pcs) tags that can be inserted in the Code field.

  Use **Validate** to check the syntax of any pcs tags in the Code field. (Code between HTML tags is not verified.) To correct a syntax error, click the line number to select the part of the code in which the error occurs.

Note: Whenever you create a new Presentation Template (unless it is an independently publishable Presentation Template), create at least one content item from the associated Data Entry Template. This enables you to preview the Presentation Template on the preview site.

For more information on using a WYSIWYG editor, see"Using a WYSIWYG Editor" on page 10-5.

For more information on the Tag Helper, see "Using Tag Helper to Write Presentation Template Code" on page 10-25.

For more information on Presentation Template code, see "Presentation Template Code" on page 10-7.

Using a WYSIWYG Editor

You can create Presentation Template code in a WYSIWYG editor and upload or copy it to the Presentation Template Editor.

To create Presentation Template code in a WYSIWYG editor:

1. Create the page as a normal web page and use placeholders for Publisher elements.
2. Open the Presentation Template in the Presentation Template Editor and click **Upload** to import your page into the Code field.

Caution: The uploaded file will replace any text in the Code field. If you want to add to an existing template without overwriting anything, use copy and paste instead.

3. Use the **Tag Helper** to replace your placeholders with pcs tags.
4. Click **Validate** to check the syntax of any pcs tags.

To edit existing template code using a WYSIWYG editor:

1. Click **Download** in the Presentation Template Editor and save the file to your computer.
2. After editing the code in the file, use **Upload** to enter it in the Presentation Template Editor.

See also "Presentation Template Code" on page 10-7.

Creating an Independently Publishable Presentation Template

If you are designing a published content portlet that consists of a simple collection of links to other content items, the usual triad of Content Item, Data Entry Template, and Presentation Template may be unnecessary, especially if the Data Entry Template would contain no properties. Instead, you can create a stand-alone Presentation Template that is publishable without a content item or Data Entry Template. Such an independently publishable Presentation

Template uses pcs functions to refer to the content items to be included in the portlet, without the necessity of referring to a Data Entry Template or associated content item.

To create an independently publishable Presentation Template:

1. In Publisher Explorer, create a folder for the Presentation Template.
2. Launch the Presentation Template Editor.
3. Enter the Presentation Template **Name** and **Publishing Name** that will be used for the file name on the web server. The system adds the .html extension when the template is published.
4. In the **Publishable** field, select **Complete Page.**
5. In the **Code** section, enter or upload the Presentation Template code.

   You can use any tag or expression in the pcs language in an independently publishable Presentation Template. The following function and method are specific to independently publishable Presentation Templates:

   – `TemplateByPath(folder?,path)`: returns only independently publishable Presentation Templates.

   – `folder.templates`: returns the independently publishable Presentation Templates in the folder.

   For more information on Presentation Template code syntax, see Presentation Template Code.

Note: Independently publishable Presentation Templates cannot be tracked in workflow.

Copying, Moving, Renaming, and Deleting Presentation Templates

You can copy, move, rename, and delete Presentation Templates in Publisher Explorer, just as you do with any Publisher component. Note the following considerations, however, when performing these functions on Presentation Templates:

- You can move Presentation Templates from one folder to another in Publisher without breaking references to Data Entry Templates and files. The only exceptions are the file paths in the `pcs:include` tag: after moving a Presentation Template, you must update paths in this tag to reflect the new location of the Presentation Template.
- Renaming a Presentation Template does not remove its association with its attached Data Entry Template, but if the renamed Presentation Template is referenced by other

Presentation Templates, you must update the name in the Presentation Templates that reference it.

- If you delete a Presentation Template that is attached to a Data Entry Template, you cannot publish or preview content items created from that Data Entry Template until you attach another Presentation Template. Deleting a Presentation Template is permanent. There is no undo.

Presentation Template Code

All Publisher elements use the same syntax and basic components. Review this section before building any Publisher elements.

This section provides an overview of Publisher elements (pcs tags) and discusses proper syntax for:

- Property Names
- Expressions
- Paths

Publisher Elements (PCS Tags)

Publisher elements (tags) are formatted like XML elements and begin with the prefix `pcs`. For example:

```
<pcs:tagname attributename=attributevalue...> Content
</pcs:tagname>
```

During publication, Publisher replaces the pcs tag with the value of the expression, or the contents of the tag if the expression fails.

Text outside pcs tags is left unchanged when the template is processed during publication. Tags can appear inside HTML elements, inside HTML tags, and inside quoted strings.

Attribute values must be surrounded by single or double quotes, as in HTML or XML:

```
<pcs:value property="dog"> (legal)
<pcs:value property='dog'> (legal)
<pcs:value property=dog> (not legal)
```

The table below summarizes the Publisher elements. A detailed explanation of each element is provided in the sections that follow.

Table 10-1 Publisher Elements (PCS Tags)

Element	Description
<pcs:value>	Displays the value of a Publisher property or the results of an expression. Accepts the following Publisher properties: Text, Long Text, Integer, Real, Boolean, Date, and Selection List.
<pcs:if>	Displays content in a published content item only if the specified condition is True. Accepts any legal expression, such as a content item property or string comparison.
<pcs:foreach>	Iterates through a collection of objects. Accepts an expression. The code between the tags is evaluated with each iteration.
<pcs:include>	Inserts the referenced Presentation Template in the content item. Accepts a path only.
<pcs:insert>	Displays a content item as a component of the current item. Accepts an expression or path. Can only be used with content items that have an associated Presentation Template.
<pcs:html>	Allows you to enter standard HTML and XML code in the Code field of the Presentation Template Editor.

You can add Publisher elements (pcs tags) to a Presentation Template by hand or use **Tag Helper** to create tags. For information on Tag Helper, see Using Tag Helper to Write Presentation Template Code and the online help.

Value Element <pcs:value>

The **<pcs:value>** tag can be used to display the results of an expression or the following Publisher properties: Text, Long Text, Integer, Real, Boolean, Date, and Selection List. Publisher translates the property value to a text string.

Syntax:

```
<pcs:value expr="expression" (format="format pattern")>default
text</pcs:value>
```

Examples:

```
<pcs:value expr="headline"></pcs:value>
<pcs:value expr="article.author">Anonymous</pcs:value>
```

```
<pcs:value property='screenwriter.name'><pcs:value
property='writer.name'></pcs:value></pcs:value>
<img src="<pcs:value expr="photo.location"></pcs:value>">
<a href="<pcs:value property='homepage.location'></pcs:value>">
<pcs:value expr='creation_time' format="MMMM dd"></pcs:value>">
```

If the value referenced by the tag is not found, the contents of the element are evaluated. The text between the tags is displayed, and any <pcs> tags inside the element are transformed. You can use the Value tag to display the result of a calculation based on the values of referenced properties. For example:

```
<pcs:value expr="bonus - agent.commissions * agent.tax_rate">
</pcs:value>
```

Date Formatting

The date format attribute is optional. If given, it provides a pattern describing how the date should appear in the published document. The format string conforms to the Java language's SimpleDateFormat definition. Formatting a date is useful for showing only part of the date value, e.g. only the time of day or only the day and month. For example:

```
<pcs:value expr='creation_time' format="MMMM dd"></pcs:value>">
```

If no format attribute is given, the date is formatted according to the setting of the system configuration property com.plumtree.content.template.defaultDatePublishFormat. If this property is not set, the built-in format used is `MM/dd/yyyy hh:mm aa`.

Conditional Element <pcs:if>

The **<pcs:if>** tag is used to display content in a published content item only if the specified condition is True. The tag accepts any valid expression, including a content item property (expression) or a string comparison. For details, see "Expressions" on page 10-18. When the content item is published, the expression in the tag is evaluated. If the expression evaluates to True, the contents of the element are evaluated; otherwise the element is ignored.

Syntax:

```
<pcs:if expr="expression">conditional content</pcs:if>
```

Examples:

```
<pcs:if expr="item.show_me">
   <pcs:value expr="item.name"></pcs:value>
   <pcs:value expr="item.description"></pcs:value>
</pcs:if>
```

```
<pcs:if expr='Author=="Poe"'>
   Books by Edgar Allen Poe:
   <pcs:value expr="booklist"></pcs:value>
</pcs:if>
```

To determine whether a property has a value, compare it with null:

```
<pcs:if expr="story.coauthor == null">...
```

Note: If a text property exists and you compare it to null it will return False. To check for empty string values compare with an empty string:

```
<pcs:value expr="story.coauthor == ''>...
```

To test that a property is defined in the Data Entry Template, compare with `undefined`.

```
<pcs:if expr="story.coauthor == undefined">...</pcs:if>
```

If a property is not defined and you compare it with null, the result will be False.

The following table summarizes how different types of values are considered True or False:

Table 10-2 Value Consideration - True/False

Type of Value	considered True if	considered False if
text	has length > 0	has length == 0
number	is non-zero	is zero
boolean	is True	is False
null	never	always
item	is defined	is not defined
collection	is defined	is not defined
enumeration	contains at least one selection	is empty

Iterator Element <pcs:foreach>

The <**pcs:foreach**> tag allows you to iterate through a collection of objects. The collection can be referenced using an expression. The code between the tags will be evaluated with each value in the iteration.

ForEach elements can be nested. A ForEach element evaluates itself before (repeatedly) evaluating its content.

Syntax:

```
<pcs:foreach var="variable" expr="expression">
   content
</pcs:foreach>
```

Examples:

```
<pcs:foreach var="item" expr="article_list">
   <pcs:value expr="item.headline"></pcs:value>
   <pcs:value expr="item.story"></pcs:value>
   This is item <pcs:value expr="item_position"></pcs:value>
   out of <pcs:value expr="item_size"></pcs:value>
</pcs:foreach>
```

```
<pcs:foreach var="item" expr="folderByPath('/authors/latest')">
```

The list of values through which the tag iterates (the type of object stored in the variable) depends on the result of the expression.

Table 10-3 Variable Object Types (Based on Result of Expression)

Result of Expression	Values Iterated	Variable Object Type
list	each value in the list	content item
enumeration (i.e., selection list)	each selected value	selected string
folder	each content item in the folder	content item
content item	list with content item as the only entry	content item
Presentation Template	list with publishable Presentation Template as the only entry	Presentation Template

On each iteration, the variable named in the var= attribute is set to each value in turn. The variable can be used within the content of the foreach tag by other PCS language expressions. If the list expression fails to evaluate, the foreach element expansion fails and the element is dropped.

Auxiliary Variables

Using the auxiliary variables defined within the ForEach tag, you can provide information about the list or about each item in the list. The auxiliary variables are named by appending a suffix to the variable name defined in the `ForEach var` attribute. The `var` attribute can be omitted from the ForEach tag; no variable will be defined for the element. The auxiliary variables are still defined and can be used without a prefix.

The following variables are defined:

- `VariableName_position`: The position of the current item in the list (starts at 1 and increments with each item).
- `VariableName_size`: The number of items in the list.
- `VariableName_previous`: The value that `VariableName` held on the previous iteration. (The value on the first pass is null.)
- `VariableName_next`: The value that `VariableName` has in the next iteration. (The value on the last pass is null.)

Note: Do not confuse variable suffixes (VariableName_position) with property references (VariableName.name).

Include Element <pcs:include>

The **<pcs:include>** tag inserts the referenced Presentation Template in the content item. The template can only be referenced by a path. The path can be relative or absolute. Relative paths are relative to the template, not the content item.

Like a server-side include, the Include tag is used most often to display headers, footers, and other kinds of boilerplate content within a page. Using this method ensures that boilerplate content appears uniformly across different types of published content and simplifies changes to the boilerplate section of a page by moving common code to a single template.

Before using the Include tag, create a separate Presentation Template that includes the content you want to include in your page.

If the specified template cannot be accessed, the include fails and the element's content is evaluated. In the example below, “Copyright 2003" is displayed if the path does not exist.

Syntax:

```
<pcs:include templatepath="path">default text</pcs:include>
```

Example:

```
<pcs:include templatepath="/boilerplate/footer">Copyright 2003
</pcs:include>
```

Insert Element <pcs:insert>

The <**pcs:insert**> tag displays a content item as a component of the current item. The second content item can be referenced by either an expression or path. The Insert tag can only be used with Publisher content items that have an associated Presentation Template.

When the expression is evaluated or the path is traversed, the result is expected to be a content item. The Presentation Template for the content item is selected and implemented using the same rules that would be used if it were being published directly. The results replace the Insert element.

If the specified content item cannot be accessed, the insert fails, and the element's content is evaluated instead. Possible failures include:

- No template found for the inserted content item.
- Expression does not evaluate to a content item.
- Path does not resolve to a content item.
- Infinite recursive expansion encountered.

In the first example below, “See the dictionary." is displayed if there is no property named `word_of_the_day`.

Syntax:

```
<pcs:insert expr="expression"></pcs:insert>
```

or

```
<pcs:insert path="path"></pcs:insert>
```

For details on syntax for expressions and paths, see the previous chapter.

Examples:

```
<pcs:insert expr="word_of_the_day">See the dictionary.</pcs:insert>
```

```
<pcs:insert path="/news/latest"></pcs:insert>
```

HTML Element <pcs:html>

Standard HTML and XML code can be entered directly into the Code field in the Presentation Template Editor. However, referencing Publisher objects can result in code that cannot be evaluated properly by an HTML editor. The `<pcs:html>` tag resolves this issue.

The <pcs:html> tag is generically replaced with a fully composed HTML or XML element to be displayed to the user. This element makes it easier to edit Presentation Templates using a standard WYSIWYG editor, by using syntax that will not be evaluated as faulty code.

Publisher replaces an element named `<pcs:html:xxx>` with an HTML element with a tag name of <xxx>. The start tag is given attributes derived from the attributes of the `<pcs:html:xxx>` element. There can be any number of attributes. Each attribute can be either an *expression* attribute or a *literal* attribute.

- An expression attribute has the form `expr:yyy="an_expression"`, where yyy is any legal attribute name and an_expression is any legal expression (for details on expressions, see *Publisher Element Syntax* earlier in this section). The corresponding attribute generated in the resulting tag is `yyy="result"`, where `result` is the text that results from evaluating the expression `an_expression`. This form allows you to provide a value, calculated at publishing time, as the value of the attribute.
- A literal attribute has the form `attr:yyy="value"`, where `yyy` is any legal attribute name and `value` is any legal attribute value. The corresponding attribute generated in the resulting tag is `yyy="value"`. This allows you to add attributes that should be constructed exactly as shown.

Syntax:

```
<pcs:html:xxx ( style="UNARY|EMPTY|ORPHAN" )? ( content="OMIT" )? (
expr:yyy="expr" | attr:yyy="value" )* >content of element
</pcs:html:xxx>
```

Examples:

```
<pcs:html:a expr:href="nextchapter.location">Next Chapter
</pcs:html:a>
```

```
<pcs:html:a attr:href="chap2/overview.htm">Next Chapter
</pcs:html:a>
```

The text between the tags is evaluated based on the resulting HTML code. The examples above would create a “Next Chapter" link to the next chapter as defined by the referenced Publisher property (nextchapter.location) or static location (chap2/overview.htm).

By default, an element generated by the HTML tag has a start tag and an end tag and content. To override this format, use the additional style and content attributes (covered next).

Style and Content Attributes

The optional style and content attributes of the HTML tag allow the Presentation Template to override the standard HTML tag format.

XML supports “empty-element" tags which combine the start and end tags like this: `<FOO/>`. The <pcs:html> tag will generate an empty-element tag if you include the `style="EMPTY"` attribute. If this attribute is given, no content is generated even if the pcs element has content.

Some browsers support a start tag without a corresponding end tag. For example, `<IMG …>` without a corresponding `</IMG>`. The <pcs:html> tag will generate a tag like this if you include the `style="UNARY"` attribute. If this attribute is given, any content generated by the pcs element is placed after the start tag.

In some odd cases HTML supports an end tag with no start tag. The <pcs:html> tag will generate a tag like this if you include the `style="ORPHAN"` attribute. If this attribute is given, any content generated by the element is placed before the end tag.

To prevent the content from being generated, include the attribute `content="OMIT"` (the content is not evaluated, so any side effects from the content will not occur).

For example, the element `<pcs:html:foo>Stuff</pcs:html:foo>` would produce the following, given the additional attributes shown:

Table 10-4 Style Attributes (<pcs:html> Tag)

Attribute	Result
(no extra attributes)	`<foo>Stuff</foo>`
`style="UNARY"`	`<foo>Stuff`
`style="ORPHAN"`	`Stuff</foo>`
`style="EMPTY"`	`<foo/>`
`content="OMIT"`	`<foo></foo>`
`style="UNARY" content="OMIT"`	`<foo>`
`style="ORPHAN" content="OMIT"`	`</foo>`
`style="EMPTY" content="OMIT" (redundant)`	`<foo/>`

Property Names

A Presentation Template is evaluated in the context of a content item (unless it is an independently published Presentation Template). The Data Entry Template corresponding to the content item controls the names and types of any user-defined properties. All content items also have a set of system-defined properties (such as the property, *name*). The names of system-defined and user-defined properties can be used in a template to refer to the corresponding property values for the current content item.

The simplest property expression is the name of one of the properties in the content item being published:

```
<pcs:tag property="Headline">
```

In more advanced uses, the property expression might be a dotted expression. Evaluating from left to right, each property to the left of a dot must evaluate to something that has a property with the name to the right of the dot.

In the example below, “author" is a property in the current content item which refers to a content item having a property “bio", which refers to another content item, which has a property “hometown".

```
<pcs:tag property="author.bio.hometown">
```

The only characters that the system treats as unique in a property name are alphabetic (a-z) and numeric (0-9). All other characters (punctuation, blanks) are treated as equivalent and are replaced with an underscore (“_”). Uppercase and lowercase letters are treated equivalently. For example, all of the following tags are equivalent:

```
<pcs:tag property="jug_head">
<pcs:tag property="JUG HEAD">
<pcs:tag property="Jug+Head">
```

Caution: If you change the name of a property in a Data Entry Template, you must also change any references in the associated Presentation Template.

System-Defined Properties

System-defined properties can be applied to the current content item or any Publisher object associated with the current content item. A property applies to the preceding value of the expression (to the left of the dot). If the property is not preceded by a dot, it applies to the current content item.

Caution: The property names listed in this section are used by Publisher. If you create a property with the same name, it will override the system-defined property. For example, creating a property named *location* will prevent the URL to that content item from being accessed using a Publisher expression. This could be desirable if the content item should redirect to another location.

The following properties are defined by the system:

Table 10-5 System-Defined Properties

Property	Description
location	URL indicating where the Publisher object was or will be published. Useful for building links on a page. This property is treated as text. **Valid for:** content item, file property, image property, folder, publishable Presentation Template.
created	Date that the Publisher object was created. **Valid for:** content item, folder, publishable Presentation Template.
createdBy	Name of the user who created the Publisher object. **Valid for:** content item, folder, publishable Presentation Template.
modified	Date that the Publisher object was last modified. **Valid for:** content item, folder, publishable Presentation Template.
modifiedBy	Name of the user that last modified the Publisher object. **Valid for:** content item, folder, publishable Presentation Template.
published	Date that the Publisher object was last published. **Valid for:** content item, publishable Presentation Template.
publishedBy	Name of the user who last published the Publisher object. **Valid for:** content item, publishable Presentation Template.
name	Name of the Publisher object as it appears in Publisher Explorer. This property is treated as text. **Valid for:** content item, file property, image property, folder, publishable Presentation Template,

Table 10-5 System-Defined Properties

Property	Description
pcs_id	Unique identifier string assigned to the Publisher object by the system. As long as the object exists, the unique id will not change, even if the object is renamed or moved to a different folder. **Valid for:** content item, folder, publishable Presentation Template.
pcs_path	Full path to the Publisher object, within the folder hierarchy. The path starts with a "/", and each component of the path is separated from the next by another "/". Special characters in names are not translated to underscores, so if any of the components' names contains a slash character, the result can be confusing. **Valid for:** content item, folder, enumeration, publishable Presentation Template.
height	Vertical dimension, in pixels. This property is treated as an integer. **Valid for:** image property.
width	Horizontal dimension, in pixels. This property is treated as an integer. **Valid for:** image property.
length	Length of the object in units appropriate to the type of the object. **Valid for:** any expression that produces text, in which case the result is the number of characters in the text; a list, in which case the result is the number of values in the list.
folder	Folder that contains the Publisher object. **Valid for:** content item, folder, publishable Presentation Template.
item	Current content item. This property can be used to access the current content item; without it there is no way to compare the current object with another item reference. Useful in expressions that test whether two item references are the same. **Valid for:** content item, publishable Presentation Template.
subfolders	A list of subfolders. **Valid for:** folder.

Expressions

Any Publisher tag that accepts a property can also use a general *expression*. An expression attribute's value can be:

- a property name
- a constant
- an expression (one or more expressions combined with an operator)
- a function call

Property Names

Expressions can be used to reference Publisher properties. To reference a property, use the rules described in "Property Names" on page 10-16.

Constants

A constant expression can be a number constant or a string constant.

A number constant is any string of digits. The string can be preceded by a minus sign and can contain at most one decimal point. If there is a decimal point, there must be at least one digit on either side of the decimal point. Any of the examples below is legal:

```
<pcs:tag expr="43">
<pcs:tag expr="-43">
<pcs:tag expr="4.3">
```

A string constant is any string of characters surrounded by single or double quotes. XML escaping rules must be applied if quotes in the expression could be confused with the quotes around the attribute value. Any of the examples below is legal:

```
<pcs:tag expr="'hello'">
<pcs:tag expr="'goodbye'"
<pcs:tag expr="'don&apos;t yell &quote;help!&quote;h'">
```

Expressions

All expressions are supported within expression attributes. Expressions can be compared and combined using relational, arithmetic and logical operators (detailed in the sections that follow.)

Note: Comparisons are case-sensitive; property names are not. Strings allow the use of spaces and punctuation marks; property names do not.

Examples:

```
expr="story.author == 'Joe'"
```

```
expr="17 != magic_number"
expr=""story_list.length != item.reference_count"
expr="item.interest_level &gt; item.skill + item.ref.skill"
expr="'hello world' == 'hello' + ' ' + 'world'"
expr="4" (non-zero integer is always treated as true)
```

Relational Operators

The following relational operators are supported in the expression attribute:

Table 10-6 Relational Operators

Operator	Meaning	Equivalent JavaScript
==	is equal to	==
!=	is not equal to	!=
>	is greater than	>
≥	is greater than or equal to	>=
<	is less than	<
≤	is less than or equal to	<=

Note: Since the greater-than and less-than characters have special meaning in XML and are reserved, the equivalent entities listed above must be used instead.

```
(NOT correct) <pcs:if expr="subscriber_count > 100">...
(correct) <pcs:if expr="subscriber_count &gt; 100">...
```

The result of a comparison expression using these operators is a boolean True or False.

When comparing two strings, case is significant.

`expr="'blue'=='Blue'"` is false.

To determine whether a property has a value, compare it with null:

```
expr="story.coauthor == null"
```

When comparing values of various types, the following rules apply:

Table 10-7 Comparisons - Rules

Value Types	Equality operators (== and !=)	Relational operators (>, ≥, <, ≤)
text v. text	exact same characters in same sequence	relative alphabetic value of first differing character
number v. number	same numerical values	relative numerical values
enumeration v. enumeration	based on same enumeration type, contain same selections	n/a
text v. number	text is converted to number and compared	text is converted to number and compared
text v. enumeration	enumeration is converted to text and compared	n/a
item v. item	same item	n/a

Arithmetic Operators

The following arithmetic operators are defined:

Table 10-8 Arithmetic Operators

Operator	Meaning	Notes
+	numeric addition or text concatenation	If both operands are numbers, calculates sum; otherwise treats operands as text
-	numeric subtraction	If either operand is text, attempts to convert to a number before calculating
*	numeric multiplication	same as above
/	numeric division	same as above
%	numeric remainder	same as above

These operators are the same as their JavaScript equivalents. As in JavaScript, all numbers are treated as real numbers; even if two property values are both integers, the result of calculating

with them will be a real number. For example, 5 / 4 will result in 1.25, unlike in some languages where the result would be 1.

Logical Operators

The following logical operators are defined:

Table 10-9 Logical Operators

Operator	Meaning	JavaScript Equivalent
∧	logical and	&&
∨	logical or	||
!	logical not	!

As in JavaScript, the result of an expression of several similar logical operators will be the value of the first operand that satisfies the logical operator; the rest of the operands are not evaluated. The AND operator is satisfied by the first operand that evaluates equivalent to False. The OR operator is satisfied by the first operand that evaluates equivalent to True. The following table provides some examples:

Table 10-10 Logical Expression Examples

Expression	Result
`"foo" ∧ "bar"`	`"bar"`
`"" ∧ "bar"`	`""`
`"" ∧ 0`	`""`
`"foo" ∨ "bar"`	`"foo"`
`"" ∨ "bar" ∨ "bax"`	`"bar"`
`"" ∨ 0`	`0`
`!""`	`True`
`!"foo"`	`False`

Operator Precedence

The order in which operators are evaluated is the same as in JavaScript. Operations with higher precedence take place before operations with lower precedence. Operators with the same precedence are evaluated left to right. The list of operators below is in order of precedence, from highest to lowest:

Highest

!

( )

.

* / %

+ -

> ≥ < ≤

== !=

∧

∨

Lowest

Functions

The only functions available for use in expressions are those predefined by the system:

Table 10-11 Functions for use in Properties

Function	Parameters	Return Value
`itemByPath(path)` `itemByPath(folder, path)`	path: String folder: Folder	The content item identified by the path.
`TemplateByPath(folder, path)`	path: String folder: Folder	The publishable Presentation Template identified by the path.

Table 10-11 Functions for use in Properties

Function	Parameters	Return Value
`folderByPath(path)` `folderByPath(folder, path)`	path: String folder: Folder	The folder identified by the path string.
`objectByUid(uid)`	uid: String (unique identifier obtained from Publisher)	The object identified by the UID.

Note: Relative paths are based on the Presentation Template, not the content item being published. To get the name of a folder relative to the item, use

```
<pcs:value expr="itemByPath(folder, 'my/sub/folder').name">
**Expression Failed**</pcs:value>
```

For details on using paths, see the *Paths* section that follows.

Functions can be used to access the properties of another content item, as shown in the examples below.

```
<pcs:value expr='itemByPath("/News/Headlines")'>**Expression Failed
**</pcs:value>
```

The first example would evaluate to **Expression Failed** because the property cannot be rendered. This can be corrected by adding a property reference, as shown below.

```
<pcs:value expr='itemByPath("/News/Headlines").name'>
**Expression Failed **</pcs:value>
```

Paths

Many Publisher tags use a *path* to reference a Publisher object. A path string is similar to a filesystem path or URL; that is, a string of names with slashes (/) separating them. The last name is the name of the desired object, and the preceding names are the folders to traverse to find the object.

If the path begins with a slash, it is an *absolute* path. The search begins at the root folder of the publishing site.

```
path="/library/includes/music/symphony"
```

In this example, the site root folder is searched for a folder named “library". That folder is searched for a folder named “includes". That folder is searched for a folder named “music". That folder is searched for an object called “symphony", and that object is used by the tag.

If the path does not begin with a slash, it is a *relative* path. The search begins at the folder containing the template or content item in use.

```
path="show/public/navbar"
```

In this example, the current folder is searched for a folder named “show". That folder is searched for a folder named “public". That folder is searched for an object called “navbar", and that object is used by this tag.

Caution: Spaces or special characters in any of the folder names or the object names must be represented by underscores (_) in the path.

```
path="Related_Templates/july_and_august/summer_festival"
```

Folder and template names are not case sensitive. The code below is equivalent to the previous path.

```
path="related_templates/July_and_August/SUMMER_FESTIVAL"
```

The special path component ".." (two periods, often called "dot-dot") refers to the folder above the current folder:

```
path='../../vegetables/onions'
```

This example starts with the current folder, goes to the folder containing it, goes up again one folder, goes down into the folder “vegetables", and then accesses the object called “onions".

Since a root folder has no container, applying “.." to a root folder has the same effect as trying to access any folder that does not exist.

Using Tag Helper to Write Presentation Template Code

The **Tag Helper** is an interface that helps you to include Publisher elements, images, and portal controls in a Presentation Template. Each tabbed page in the Tag Helper creates a specific tag that can be added to the Code field in the Presentation Template Editor. Click the tabs in the Tag Helper window to access the appropriate tag:

- Value
- If
- ForEach

- Images
- Portal Controls
- Insert
- Include
- HTML

For more information on Tag Helper, see the online help.

For more information on Publisher elements (pcs tags), see Presentation Template Code

For more information on Portal Controls, see the *AquaLogic User Interaction Development Guide* on dev2dev.bea.com.

Using CSS and JavaScript Files

If you are creating content items for a web site, you can ensure consistency from one web page to the next using a Cascading Style Sheets (.css) file, a .js (JavaScript) file, or both. To manage .css and .js files, bring them into your Publisher database and publish them to your web site:

1. Create a .css or .js file in the appropriate program of your choice.
2. In Publisher Explorer, create a content item to contain the text from the .css or JavaScript file you created in step 1:
   a. Create a Data Entry Template with one property of the **Long Text** property type.
   b. Create a Presentation Template. Use the **Value** tag to reference the property you created in the Data Entry Template.
   c. Create a content item from the Data Entry Template and paste the contents of the .css or .js file into it. For **Publishing Name**, specify the name you want the file to have when published to the Web, followed by the extension (.css or .js).
3. In Publisher Explorer, create another content item to serve as a link between the .css or .js content item. web pages should reference the content item you create in this step, not the content item created in step 2.
   a. Create a Data Entry Template for the linking content item. The Data Entry Template should have a single property of the **Item** property type.
   b. Create a Presentation Template for the Data Entry Template. Use the **HTML** tag to specify the name of the .css or .js content item and other variables. For example:

JavaScript (.js):

```
 <pcs:html:script attr:language="JavaScript"
expr:src="item_name.location">

</pcs:html:SCRIPT>
```

Cascading Style Sheet (.css):

```
 <pcs:html:link attr:rel="stylesheet" expr:href="css_link.location"
attr:type="text/css"></pcs:html:link>
```

c. Create a content item from the Data Entry Template you created in step 3a. In the **Item** property, type the name of the content item that contains the .css or .js file you created in step 2c.

4. In Publisher Explorer, create a Data Entry Template and content items for web pages.

   a. Create a Data Entry Template with the appropriate properties and property types for the web page.

   b. Create a Presentation Template for the Data Entry Template. Use the **Insert** tag to insert the content item created in step 3. For example: `<hps:insert path="/assets/css_linked_item"></hps:insert>`

   c. From the Data Entry Template you created in step 4a, create the content items that use the .css or .js file(s).

Caution: You must publish the content items created in steps 2 and 3 along with the web pages.

Whenever you want to apply a different .css or JavaScript file, you can copy the contents of the new .js or .css file into the content item you created in step 2c and republish to the web site.

Presentation Template Tools

Publisher provides Presentation Template Tools in the form of JSPs so the Presentation Template creator can use these tools to access Publisher functionality from published content.

The JSPs are:

- content_item.jsp
- create_folder.jsp
- search.jsp

content_item.jsp

You can use this to open the Content Item Editor.

Table 10-12 content_item.jsp parameters

Parameter	Description
fid	the id of the folder to create a new content item
dfid	the id of the folder containing the Data Entry Template specified by the det parameter
det	the name of the Data Entry Template to use to create a new content item. The Data Entry Template must be located in either the folder specified by dfid or fid
ctid	the id of the Data Entry Template to use to create a new content item
ciid	the id of the content item to open in the Content Item Editor
checkout	set to true to check out the content item specified by ciid
view	set to “submit” to force the user to get the simple submit view of the Content Item Editor

Examples:

To create a new content item in the articles folder using the news article Data Entry Template (also located in the articles folder):

```
<pcs:value
expr='pcs_location'></pcs:value>/published_tools/content_item.jsp?fid=<
pcs:valueexpr="folderByPath('Articles').pcs_id"></pcs:value>&det=News%2
0Article"
```

To edit an existing content item:

```
<pcs:value
expr='pcs_location'></pcs:value>/published_tools/content_item.jsp?ciid=
<pcs:value expr='pcs_id'></pcs:value>
```

create_folder.jsp

Use this to prompt the user to create a new folder.

Table 10-13 create_folder.jsp parameter

Parameter	Description
fid	the id of the parent folder to create the new folder

Example:

To prompt the user to create a new folder within the articles folder:

```
<pcs:value
expr="pcs_location"></pcs:value>/published_tools/create_folder.jsp?<pcs
:value expr="folderByPath('Articles').pcs_id"></pcs:value>
```

search.jsp

Use this to search for published content items associated with a particular portlet.

Table 10-14 search.jsp parameters

Parameter	Description
fid	search for content items associated with the same portlet as the folder id specified here. If it is not specified, it will search for content items associated with the current portlet if it exists
searchtext	the text to search for

Example:

To search for the string “hello world” in content items associated with the current portlet:

```
<pcs:value
expr=”pcs_location”></pcs:value>/published_tools/search.jsp?searchtext=
hello%20world
```

Note: The above JSPs respect the security of the folder in which the action is taking place.

CHAPTER 11

Configuring Custom Portlet Templates

The Configure Portlet Template Wizard enables you to create customized published content portlet templates that portlet creators can use to create published content portlets. This feature provides the portlet creator with the ability to create published content portlets that fit a greater range of needs than is provided by the sample published content portlet templates (Announcement, Community Directory, and News) and branding portlet templates (Content Canvas, Header, Footer).

This chapter provides an overview of published content portlet templates and discusses how to create and configure published content portlet templates:

About Published Content Portlet Templates

A published content portlet template comprises the objects in a Publisher folder that get copied when a portlet is created from the portlet template. Creating a published content portlet template therefore requires that you do the following:

1. Create the Publisher objects (folders, content items, Data Entry Templates, Presentation Templates) that will be copied to create portlets. These objects comprise, in essence, a master portlet that will be copied (and modified) whenever a portlet is created from the template. You accomplish this using Publisher Explorer.
2. Specify the way the Configure Portlet Wizard presents the template for portlet creation and set defaults (such as security defaults) that will be inherited by portlets created from the portlet template. You accomplish this using the Portlet Template Editor (in the ALI portal) and the Configure Portlet Template Wizard.

Publisher provides three sample published content portlet templates and three branding portlet templates that you can configure to meet your organization's particular needs, using the Configure Portlet Template Wizard. These portlet templates also provide a useful starting point for understanding how to create your own portlet templates.

For more information on the sample published content portlet templates, see "Sample Published Content Portlet Templates" on page 6-2.

Creating and Configuring Published Content Portlet Templates

You use the Portlet Template Editor in the ALI portal and the Configure Portlet Template Wizard in Publisher to create and modify published content portlet templates.

This section discusses prerequisites for creating published content portlet templates and includes the following topics:

- Accessing the Configure Portlet Template Wizard
- Using the Main Settings Page
- Using the Advanced Settings Page
- Using the Object Categories Page
- Using the Template Security Page
- Using the Portlet Security Page
- Saving the Portlet Template

Prerequisites

Before you create a new portlet template, you need, at minimum:

- A folder in Publisher Explorer for the portlet template. This folder cannot already be associated with a published portlet or portlet template.
- A content item to be the portlet item (the content item that appears as the view or entry-point to the portlet on the portal page) for the portlet template.

If your portlet template requires any of the following, you must also create these before you create the portlet template:

- Data Entry Templates.
- Presentation Templates.
- Any other content items.
- A folder in which new portlets created from this portlet template will be saved by default.

Note that, although it is typical to have all of a portlet template's content items, Data Entry Templates, and Presentation Templates included in the same portlet template folder, this is not required. You may choose, for example, to use the same header or footer Presentation Template for a number of portlet templates; as long you associate the Presentation Template with the portlet template when you configure the portlet template, the Presentation Template need not be placed in the portlet template folder.

Accessing the Configure Portlet Template Wizard

To access the Configure Portlet Template Wizard:

1. In the ALI portal, click **Administration.**
2. Select a folder and, in the **Create Object** drop-down list, choose **Portlet Template** to access the **Portlet Template Editor.**
3. On the Main Settings page, in the Web Service area, click **Browse** to the right of **Web Service** to access the **Choose Web Service** dialog box.
4. In the Choose Web Service dialog box, select **Published Content** web service**.**
5. On the Main Settings page, Web Service area, click the **Edit** button to the right of Configure this Portlet to access the **Configure Portlet Template Wizard** in Publisher.

Using the Main Settings Page

To configure portlet templates and make them available for portlet creation using the **Configure Portlet Template Wizard:**

1. On the **Configure Portlet Template - Main Settings** page, click **Browse** to the right of **Folder** to select the folder for the portlet template.
2. Click **Browse** to the right of **Portlet Item** to select the main content item (the item that appears as the view or entry-point to the portlet on the portal page) for the portlet template.

3. (Optional) Click **Browse** to the right of **Default Save to Location for Portlets** to choose the folder in which new portlets created from this portlet template will be saved by default. Users can override this selection when they create a portlet.

4. If you have no additional properties or preferences to add to the template, you can click **Finish** to save and publish the portlet template. However, you might want to specify more advanced settings. For those settings, use the **Advanced Settings, Object Categories, Template Security** and **Portlet Security** pages in the wizard.

   Note: After you click Finish in the Configure Portlet Template Wizard, you must also click **Finish** and save the portlet template in the **Portlet Template Editor** to make the template available for portlet creation.

Using the Advanced Settings Page

Use the Advanced Settings page to enable users to specify workflow and security when they create portlets from the portlet template and to choose whether to allow community owners to customize portlets created from the portlet template.

To choose advanced settings in the Configure Portlet Template Wizard:

1. In the Configure Portlet Template Wizard, click **Advanced Settings** to access the **Configure Portlet Template - Advanced Settings** page.

2. Under Portlet Editor Options, **Security Folder,** click **Browse** to select the folder that users will use to specify Publisher security when they create a portlet from the template. Users will be able to override inherited security settings for this folder.

   For more information on overriding and specifying Publisher security for portlet folders and subfolders, see "Setting Publisher Security for Published Content Portlets" on page 6-13.

3. Under Portlet Editor Options, **Workflow Folder,** click **Browse** to select the folder that users will use to specify workflow assignments when they create a portlet from the template. Users will be able to override inherited workflow settings for this folder.

4. Under Customization Rights, choose whether to **Allow Community Owners to customize the portlet?** Choosing this option enables users with edit rights for a community to customize certain portlet properties *in that community only.* Enter instructions for community owners to explain why or how the portlet can be customized for the community. These instructions will appear on the Community Preferences page when a user clicks Portlet Preferences in the Community Editor and selects the edit icon next to the portlet name.

For more information on the Community Preferences page in the Community Editor, see the *Administrator Guide for AquaLogic Interaction* and the online help.

Using the Object Categories Page

To specify the Publisher objects (Data Entry Templates, Presentation Templates, and content items) that will be presented for editing in the Configure Portlet Wizard:

1. In the Configure Portlet Template Wizard, click **Object Categories** to access the **Configure Portlet Template - Object Categories** page.
2. Enter at least one functional category of objects to be presented for editing, and enter objects for each category. Each category appears as a separate page in the Configure Portlet Wizard. There are two ways to enter categories and objects:
   - If you want the wizard to create categories and objects automatically, click the **Auto** button. The system searches for content items in the portlet template folder and detects any objects that have a relationship with these content items (such as Presentation Templates and Data Entry Templates), creating a category for each content item and its associated objects. Click on a category to populate the Objects pane with all of the portal objects in the category.
   - If you want to create categories and enter objects manually, click **Add New Category** and click on the New Category to name it and enable the **Add Object** icon. Click Add Object to choose the objects that you want to include in the category.

   Enter a description of each category and object. The description will appear on each category page in the Configure Portlet Wizard, and can provide portlet creators with explanations of the role each category performs in determining the presentation and data structure of the portlet.

Using the Template Security Page

Use the Template Security page to set the security for the portlet template folder in Publisher.

Portal security for the portlet template is maintained separately from Publisher security for the portlet template (that is, for the Publisher items that make up the portlet template: the portlet template folder, subfolders, content items, Data Entry Templates, and Presentation Templates). In general, users with access to the portlet template in ALI portal administration should have the same level of access to the portlet template in Publisher. Without this mapping of portal security to Publisher security, users who attempt to create a portlet from the portlet template might be denied access to the portlet template's Publisher items and be unable to create the portlet.

To set the Publisher security for the portlet template folder and map the portlet template's portal security to its Publisher security:

1. In the Configure Portlet Template Wizard, click **Template Security** to access the **Configure Portlet Template - Template Security** page.
2. Under Security Settings, click **Edit** to access the **Content Security** page, where you can edit the template folder's security settings.
3. On the Content Security page:
   - If you want the portlet template to inherit the Publisher security of the Publisher folder it resides in and you *do not* want to map the portlet template's portal security to its Publisher security, check the **Inherit Security** checkbox. This option is checked by default when you create a portlet template.
   - If you want to specify the Publisher security for the portlet template or you want to map the portlet template's portal security to its Publisher security, clear the **Inherit Security** check box. This activates the **Add Users and Groups** and **Add Portlet Security Map** buttons, along with a shortcut button labeled **New Portlet Template**. If you have already named and saved the template, this button is labeled with the name of the portlet template.
   - To specify the Publisher security for the portlet template, use the **Add Users and Groups** button to select and add users and groups. Use the **Role** column to assign roles to the users and groups.
   - To map the portlet template's portal security to its Publisher security, click the **New Portlet Template** (or portlet template name) button to activate the fields that enable you to map portal access to Publisher roles for the portlet template. The portlet template name appears in the **Portal Object** column; in the **Access Level to Role** column, select the appropriate Publisher roles for each portal security access level.
   - Click **Finish** to return to the Configure Portlet Template - Template Security page.

   For more information on the mapping process, see "Mapping Portal Security to Publisher Security" on page 4-11.
4. Click **Finish** to return to the Configure Portlet Template - Template Security page.

Using the Portlet Security Page

Use the Portlet Security page to set the default Publisher folder security for the portlets created from the portlet template.

As with portlet templates, portal security for the portlet is maintained separately from Publisher security for the portlet. In general, users with access to the portlet in the portal should have the same level of access to the portlet's Publisher security. Without this mapping of portal security to Publisher security, users who attempt to create a content item such as a news article from a portlet might be unable to do so because they have no access to the portlet's Publisher items.

You can map portal security to Publisher security for the portlet folder and any subfolders that will be created within the portlet folder.

To map portal security to the Publisher folder security for the portlets created from the portlet template:

1. In the Configure Portlet Template Wizard, click **Portlet Security** to access the **Configure Portlet Template - Portlet Security** page.
2. Check **Enable** for each folder for which you want to set default security.
3. For each enabled folder, select the Publisher roles that each portal security level should have for the folder.

   The Portlet Editor will assign these roles as the default Publisher security for all portlets created with the template. For example, if you map the *Select* portal access level to the *Submitter* role for the portlet folder, all users with *Select* portal access will have *Submitter* access to the portlet folder in Publisher.

   Explicit Publisher folder security settings (the security settings that appear in the Users/Groups and Role columns on the Content Security page) are not affected by the default security you map here. Those settings are copied from the next folder up in the hierarchy, whether or not you enable portlet security defaults here.

   If you do not specify default security settings here, the default security settings (mapped and explicit) for any folder created with this template will be inherited from its parent folder. In either case, the portlet creator can override these defaults.

   Note: Portlet creators and editors can change these default security settings from the Configure Portlet Wizard only if the portlet template allows them to set Publisher security for the folder. You use the Advanced Settings page of the Configure Portlet Template Wizard to select the folder for which portlet creators can set Publisher security. If portlet creators want to change the default security for another folder in the portlet, they must do so through Publisher Explorer.

   For more information on the mapping process, see "Mapping Portal Security to Publisher Security" on page 4-11.

For more information on Publisher portlet folder security defaults, see "Setting Publisher Security for Published Content Portlets" on page 6-13.

Saving the Portlet Template

To save the portlet template and make it available for portlet creation:

1. When you have completed the portlet template configuration using the Configure Portlet Template Wizard, click **Finish** to return to the Portlet Template Editor in the ALI portal.
2. (Optional) Make any further modifications to the portlet template that you want. These can include:
   - Entering the name of the portlet template.
   - Enabling and entering localized names.
   - Entering and editing global object properties for the portlet template.
3. Click Finish to access the Save Object dialog box, where you name the portlet template, set its portal security, and save it.

The portlet template is now available for portlet creation for the users to whom you have granted access.

See the *Administrator Guide for AquaLogic Interaction* and the AquaLogic Interaction online help for more information about the Portlet Template Editor and the Global Object Property Map.

CHAPTER 12

Using Workflow

Workflow makes it possible to control the quality and accuracy of content items before they are published. A workflow consists of an ordered set of activities, each requiring approval by an assignee. When workflow is attached to a folder, content items in that folder submitted to workflow must be processed through this defined set of activities before being published.

This chapter provides an overview of Publisher workflow and includes the following topics:

- Setting Up Workflow
- Attaching Workflow to Folders
- Handling Workflow

About Workflow

Workflow is similar to a checklist of reviews and approvals. The basic building block of workflow is the workflow definition—also called, simply, a *workflow*—which is a defined, ordered set of approval steps called *workflow activities*. Each workflow activity in a workflow is assigned to a user or group of users. For example, to send out a press release announcing a new product line, your organization might need to take the following steps:

- Marketing writes the press release.
- The product line manager confirms that the facts are correct.
- The legal department reviews it for legal accuracy.
- An editor proofreads it.

- The press contact gives it a final review, and if everything is ready, publishes the press release.

Your workflow definition would include a workflow activity for each of these steps, with a user or group of users assigned to each. When a content item is submitted to workflow, it is called a *work item.* When a work item is submitted or passed along to a workflow activity, the assigned users can do one of the following:

- Approve the work item and send it on to the assignees for the next activity—and publish it if the item is publishable in that activity.
- Reject it and send it back to the previous assignee.
- Transfer or delegate the assignment to another user, if the workflow activity allows it.

Publisher workflow automatically moves the work item through each activity and notifies each responsible party when it is his or her turn to review or take action on the item.

You define workflows at the system level, but you implement them by attaching them to a Publisher folder. By default, a folder inherits the workflow properties of its parent folder, but users in the Administrator or Folder Administrator role can override this default and assign new workflow properties at any folder level.

Workflow administration involves the following tasks:

- Assigning the Configure Workflow activity right to users who will define and manage workflows. Users in the portal Administrators group can assign this activity right.
- Defining and managing workflows. This requires the Configure Workflow activity right.
- Attaching workflow to Publisher folders. Users with the Administrator and Folder Administrator roles can attach workflow.

Users in lower-level roles and without the Configure Workflow activity right can perform the following tasks:

- Setting up their email address for workflow notification in their portal user profile.
- Submitting content items to workflow. Users in the Submitter role and above can submit workflow.
- Approving and rejecting work items. Users in the Reader role and above can approve and reject work items. Users in the Editor role and above can approve and publish a content item if it is in a workflow activity that allows publishing.

- Claiming, transferring, and delegating workflow assignments. Users in the Reader role and above can claim, transfer, and delegate workflow activities that they are assigned to.
- Overriding workflow. Users in the Folder Administrator role and above can override workflow activities or remove a content item from workflow.
- Viewing items in workflow by folder. Users in the Submitter role and above can view the items in workflow for the folders to which they have access.

Setting Up Workflow

This section discusses how to:

- Assign the Configure Workflow activity right.
- Set up workflow notifications.
- Define and edit workflows.

Assigning the Configure Workflow Activity Right

The Configure Workflow activity right confers access to all workflow administrative functions. You should assign this activity right to users with the Administrator role. You can also delegate this right to users in other roles.

See "Assigning the Administer Publisher and Configure Workflow Activity Rights" on page 4-9.

Setting Up Workflow Notifications

Workflow notification uses the e-mail address entered in the user's profile in the portal. Depending on the access set up by the portal administrator, updating this email address can be either an administrative or end-user function.

For more information, see the *Administrator Guide for AquaLogic Interaction*.

Defining and Editing Workflows

In Publisher, workflows control the configuration and order of workflow activities. As a user with the Configure Workflow activity right, you can use the Workflow Editor to define any number of workflows with as many workflow activities as you want. All workflows that you define are available to be attached to any folder in the Publisher directory.

Note: If you modify a workflow that is already attached to a folder, work items that are currently in workflow will continue to follow the workflow as it was defined when the item was first submitted. Only content items submitted to workflow after your modification will use the modified workflow.

When you define a workflow, you should be aware of the Publisher security assigned to the folders that the workflow will be attached to. Be sure that the users and groups you assign to a workflow activity have sufficient security access to perform the activity. For example, users whom you assign to a workflow activity that allows publishing must have a role that allows publishing (Editor or above) for any folder that uses the workflow.

Creating a Workflow

This section discusses how to:

- Launch the Workflow Editor.
- Use the Workflow Editor.

Launching the Workflow Editor

To launch the Workflow Editor:

1. In the Publisher Administration portlet, click **Workflow Administration** to open the Workflow Administration page. (This link is available only to users with the Configure Workflow activity right.)
2. Click **New Workflow** to launch the Workflow Editor.

You can also define a new workflow by copying an existing definition on the Workflow Administration page:

1. Choose the check box next to the workflow that you want to copy.
2. Click **Copy** to launch the Workflow Editor.

Using the Workflow Editor

To define workflow and set the order of workflow activities:

- Enter a **Name** and **Description** of the workflow.

  The name and description appear on the Folder Workflow Properties page, where you attach workflow to folders; the Workflow Assignment page, where assignees can view assignment details; and the Workflow Administration page. Use a name and description

that make clear what the workflow is used for. For example, you might want to mention if the workflow was created for a particular folder.

- Select whether or not to **Enable** the workflow. Only enabled workflows can be attached to a Publisher folder.
- To add an activity to workflow, click **New Activity** under **Activity List**. The new activity appears in the activity list, and the fields in the **Activity Properties** area become available for defining the properties of the new activity.

  If you are copying or editing an existing workflow, all existing activities appear in the activity list. Click on the activity name to make it available for editing in the Activity Properties area.

  Note: The system automatically creates a first activity called **Start,** which is assigned to the user who submits the item to workflow. Work items enter this activity only if the assignee for the next activity rejects the item and sends it back to the submitter. You cannot assign a user to this activity or move it.

- In the **Activity Properties** area, define each workflow activity:
  - Enter an **Activity Name** and **Description.**

    The name and description appear on the Workflow Assignments page, where assignees handle workflow items, and also appear on the description page that you access from the Folder Workflow Properties page. The name appears on all of the intrinsic Publisher portlets that include workflow information. Use a name that makes clear what needs to be done during this activity and a description that makes clear what the activity is for.

  - Assign users to the workflow activity by clicking **Add Assignees.**

    Assigning an individual or a group to an activity restricts access to work items in that activity as long as they remain in that activity. All activities in a workflow must have assignees in order for that workflow to be available for attachment to a Publisher folder. Although users in the Editor role and above can edit a content item at any time, Contributors and Submitters cannot edit a content item unless they are assigned to the current activity as individuals or members of a group.

    Caution: Assignees must have the proper security access for any folders to which you attach the workflow.

    You can assign the activity to the initiator by clicking **Assign Initiator.** If users have already been assigned to the activity, the Add Assignees field label changes to **Add/Change Assignees.** In that case, a **Remove All** link also appears, enabling you to delete all assignees from the activity.

  - To enable users in the Editor role or higher to publish a content item when it is in the activity, select the **Publishable** check box.
  - To enable users to delegate this activity to another user, select the **Allow Delegation** check box. Delegation enables users to reassign an activity to another user, while retaining the ability to claim and handle the activity themselves.
  - To enable users to transfer this activity to another user, select the **Allow Transfer** check box. Transferring, unlike delegation, enables a user to reassign a workflow activity to another user without retaining the ability to handle the activity themselves.

- To move an activity up or down in the order of workflow, click the up and down buttons on the far right column in the Activity List.

Attaching Workflow to Folders

To implement workflow, a user in the Administrator or Folder Administrator role must attach workflow to a Publisher folder. Lower-level folders inherit the workflow of the parent folder by default; an Administrator or Folder Administrator can override this inheritance and attach the workflow of their choice.

To attach workflow to a Publisher folder or to change the workflow that is attached to a folder:

1. Access the Folder Workflow Properties page. You can do this in a number of ways:
   - In Publisher Explorer, right-click the folder and click **Workflow**.
   - In the Configure Portlet Wizard or the Configure Portlet Template Wizard, click the **Workflow** button.
2. On the Folder Workflow Properties page, you can do the following:
   - If you want the folder to inherit the workflow from the next folder up in the hierarchy, select the **Inherit Workflow settings from parent folder** check box. This is the default selection.
   - If you want to attach workflow to a top-level folder or attach workflow other than the parent folder's workflow to a lower-level folder, clear the **Inherit Workflow settings from parent folder** check box. This enables you to select workflow for the folder.
   - To add workflow to a folder that has none attached, click **Select.** This opens the Choose a Workflow dialog box.
   - To change the workflow that is attached to a folder, click **Change.** This opens the Choose a Workflow dialog box.

- To remove workflow from a folder, click **Remove.**
- To view a description and list of workflow activities in a workflow, click the workflow name.

3. The **Choose a Workflow** dialog box lists the enabled workflows. To choose a workflow to attach to a folder:
   - Click the radio button next to the workflow name.
   - Click **OK** to return to the **Folder Workflow Properties** page, where the new workflow will now appear.

     Note: If the folder security settings are not consistent with the assignments included in the workflow, a warning appears on the Folder Workflow Properties page, along with a list of the workflow assignees that do not have adequate permissions for the folder.
4. You can choose to make content items in this folder publishable if they are not submitted to workflow. To do so, select **Allow content items not in workflow to be published.** If you clear this option, content items in the folder can only be published if they are submitted to workflow and reach a publishable workflow activity.
5. Click **Finish**.

Handling Workflow

When you have created a content item that is ready for review, you submit it for approval and the system notifies the assignees for the first workflow activity. When you open a content item assigned to you, you can approve the item and advance it to the next workflow activity, you can reject the item and return it to a previous workflow activity, or you can transfer or delegate the assignment to another user. If more than one user is assigned to a workflow activity, you can claim the assignment and remove it from the other assignees' worklist before you approve it. Users in the Contributor role or above can override any workflow activity.

The workflow feature enables you to submit, approve, reject, transfer, or delegate a work item directly from the Content Item Editor. It also provides a Workflow Assignment page to provide detailed information about an assignment, along with a set of worklist portlets that enable you to find, view, and handle your current workflow assignments, as well as find and view other users' assignments. These portlets include:

Publisher Work List Portlet:

- View details about your current, delegated, and completed assignments, along with the work items you submitted.
- Approve or reject a work item.
- Transfer, delegate, or claim (take ownership of the assignment if there are multiple assignees for an activity) a current workflow assignment.
- Open Content Item Editor to edit the content item.
- Preview the content item.
- Open the Workflow Assignment page to view assignment details.

Content Items in Workflow portlet:

- View all items in workflow in a Publisher folder, including workflow activity, assignee, and due date.
- Check an item out, open Content Editor to edit it, or view the Workflow Assignments page for the item.
- Set portlet display preferences, including the folders you want to view. Only folders to which you have Submitter access or above are available for viewing.

Most Recently Used Content portlet:

- View the content items that you have accessed most recently, along with any workflow activity an item is in and its assignee.
- Check an item in and out and open Content Item Editor to edit it.

This section discusses how to:

- Submit a content item to workflow.
- Approve, reject, transfer, claim, and delegate a work item or assignment.
- View workflow assignment details.
- Override workflow.
- View workflow items by Publisher folder.

Submitting a Content Item to Workflow

Once you have created a content item and it is ready for review, you submit it to workflow, directly from the Content Item Editor.

To submit a content item to workflow (Contributors and above):

1. In the Content Editor, click the **Submit for Approval** button to access the Submit for Approval page.
2. On the Submit for Approval page, all fields are optional; you can do the following:
   - Enter a name for the workflow item in the **Subject** field. This name appears in the Worklist Portlet and on the Workflow Assignment page, above the content item name. If you do not enter a name in the Subject field, only the content item name appears.
   - Enter any **Workflow Comments** that the workflow assignees should see. If the item is checked out, the system also uses these comments as the check-in comments.
   - Enter a **Due Date** and time.
   - Enter a **Priority.**
   - View the **Next Activity** in the workflow.
   - View the assignees for the next activity in the **Next Assignment** field. If a group or more than one user is assigned to the activity, you can click **Select One** to select a specific assignee.

   Whether or not you enter any of the above information, the content item is submitted to the assignee or assignees for the next workflow activity when you click **Finish.**

If you submit a content item to workflow using the Submitter view of the Content Item Editor, the process is slightly different. A Submit button appears in the upper right-hand corner of the editor instead of the Submit for Approval button. When the Submitter clicks Submit, the content item is automatically submitted to the first workflow activity in the workflow. The user does not see the Submit for Approval page, and cannot enter comments, a due date, or priority. The default priority for content submitted by Submitters is Normal.

Approving, Rejecting, Transferring, Claiming and Delegating

If you are assigned an item in workflow, you can approve, reject, claim, unclaim, transfer, or delegate it. There are two components that enable you to do this:

1. Content Item Editor.
2. Publisher Work List Portlet.

Handling Work Items Using the Content Item Editor

For information about handling work items using the Content Item Editor, see "Using the Content Item Editor" on page 7-3.

The Content Item Editor provides access to the following workflow pages:

- Submit for Approval
- Approve
- Reject
- Transfer
- Workflow Assignment

For detailed information about the Submit for Approval page, see "Submitting a Content Item to Workflow" on page 12-9.

For detailed information about the Approve, Reject, and Transfer pages, see "Handling Work Items Using the Publisher Work List Portlet" on page 12-10.

For detailed information about the Workflow Assignment page, see "Viewing Workflow Assignment Details" on page 12-15.

Handling Work Items Using the Publisher Work List Portlet

The Publisher Work List Portlet is a workflow "inbox" that provides multiple views of workflow items that you have submitted, are assigned, have delegated, or have completed. You can access the Content Item Editor and Workflow Assignment page for any item that appears in your Publisher Work List Portlet, or you can approve, reject, claim, undo a claim, transfer, or delegate a work item directly from the portlet.

Selecting Publisher Work List Portlet Views

The Publisher Work List Portlet provides four views of workflow assignments, which you can select from the **View** drop-down list:

1. **Current Assignments:** displays all open activities assigned to you, including the following:

- An icon indicating whether you are the sole assigned user for the activity or are one among many eligible assignees. You can click on this icon to access the Workflow Assignment page.

  For information on claiming an activity for yourself when you are one among many eligible assignees, see "Claiming and Undoing Claims Using the Publisher Work List Portlet" on page 12-13**.**

- The assignee for the previous workflow activity (**From**). If the activity is the first in the workflow process, this is the user who submitted the item.
- The date the workflow item entered your inbox (**Received On**).
- The **Due Date** that the item must complete workflow.
- The priority.

2. **Delegated Assignments:** displays all open assignments that you have delegated to other assignees, including the following:
   - An icon indicating whether there is a single delegated assignee for the activity or there are many eligible assignees. You can click on the icon to access the Workflow Assignment page.
   - The user or users you delegated the activity to (**Assigned To**).
   - The date the workflow item entered your inbox (**Received On**).
   - The **Due Date** that the item must complete workflow.
   - The priority.
3. **Completed Assignments:** displays all work items assigned to you that you have approved or rejected, including the following:
   - An icon that enables you to access the Workflow Assignment page.
   - The current activity and the current assignee. The current activity appears in the **Workflow** column, and the current assignee appears in the **Assigned To** column.
   - The name of the activity you completed and the date you completed it, which appear in the **Completed Activity.**
   - The **Due Date** that the item must complete workflow.
   - The priority.
4. **Submitted Assignments:** displays all items that you submitted to workflow, including the following:

- The current activity and the current assignee. The current activity appears in the **Workflow** column; the current assignee appears in the **Assigned To** column.
- The **Submitted Date**.
- The **Due Date** that the item must complete workflow.
- The priority.

In all of the above views, you can click on the item name to preview it and the content item icon to edit it in Content Item Editor. Assignments that are incomplete past their due date appear in red.

Approving Items Using the Publisher Work List Portlet

To approve work items using the Publisher Work List Portlet:

1. Access the Publisher Work List Portlet in the Current Assignments view or the Delegated Assignments view.

   Note: You can claim and handle any workflow assignment that is assigned to you or that you have delegated.

2. Select the work item or items that you want to approve by clicking the check box next to the activity.

3. Click the Approve button to open the **Approve** page.

   Note: If an activity is assigned to multiple users, you make an implicit claim on that assignment when you select it and click Approve. You will remain the sole assignee for the activity.

4. If you want to enter an explanation of the approval or other comment for the next activity assignee, enter it in the **Workflow Comments** edit box. These comments will appear in the Publisher Work List Portlet for the next activity assignee and on the Workflow Assignment page. They also appear as the check-in comment.

5. Select whether or not to **Publish** the content item upon approval. This option is available only if the workflow activity allows publishing.

6. If there is more than one user assigned to the next activity, you can click **Select One** to assign the next activity to one user.

   Note: The option to select a single assignee is not available if you have selected multiple activities for simultaneous approval.

7. Click **OK.** A dialog appears, confirming that the item has been approved. This dialog displays the work item and—if there are more activities in the workflow—the next activity and the

next assignee or assignees. If there are more activities in the workflow, the item progresses to the next activity and appears in the Publisher Work List of that activity's assignees.

Note: You can also check the status of the work item by using the Completed Assignments view in your Publisher Work List Portlet.

Rejecting Items Using the Publisher Work List Portlet

To reject work items using the Publisher Work List Portlet:

1. Access the Publisher Work List Portlet in the Current Assignments view or the Delegated Assignments view.

   Note: You can claim and handle any workflow assignment that is assigned to you or that you have delegated.

2. Select the work item or items that you want to reject by clicking the check box next to the activity.

3. Click the Reject button to open the **Reject** page.

4. Enter an explanation of the rejection or instructions to the previous activity assignee in the **Workflow Comments** edit box. These comments will display in the Publisher Work List Portlet for the previous activity assignee and on the Workflow Assignment page. They also appear as the check-in comment.

5. Click **OK.** A dialog appears, confirming that the item has been rejected. This dialog displays the work item, the previous activity, and the previous assignee. The item is returned to the previous activity and appears in the Publisher Work List of that activity's assignee.

Note: There is no option to select a single assignee for rejected activities, since a previous activity always has only one assignee.

Claiming and Undoing Claims Using the Publisher Work List Portlet

When you claim an assignment, you remove it from any other assignees' work lists. To claim an assignment from the Publisher Work List Portlet:

1. Access the Publisher Work List Portlet in the Current Assignments view or the Delegated Assignments view.

   Note: You can claim and handle any workflow assignment that is assigned to you or that you have delegated.

2. Select the workflow assignment or assignments that you want to claim by clicking the check box next to the assignment.

3. Click the **Claim** button.
4. The **Claim Results** page opens and notifies you of the assignments that you have successfully claimed.
5. Click **Close** to return to the Publisher Work List Portlet.

To undo your claim on an assignment using the Publisher Work List Portlet, follow the directions for claiming an assignment, but instead click **Unclaim** in the portlet's tool bar. When you undo a claim, the assignments return to their original state.

Transferring and Delegating Workflow Assignments Using the Publisher Work List Portlet

When you transfer an assignment, you give up your responsibility for it to another assignee. When you delegate an assignment, you assign it to another assignee, but retain the ability to handle the assignment yourself. Transfer and delegation of workflow activities are available only if they are enabled for the workflow activity. Only users or groups with access to the content item's Publisher folder are available as transferees or delegatees.

To transfer or delegate workflow assignments using the Publisher Work List Portlet:

1. Access the Publisher Work List Portlet in the Current Assignments view or the Delegated Assignments view.
2. Select the assignment that you want to transfer or delegate by clicking the check box next to the activity.
3. Click the **Transfer** button to open the Transfer page.
4. Click **Edit** to access the Choose Users and Groups dialog box, where you can select an assignee.
5. Click **OK** to return to the Transfer page.
6. If you want to delegate the activity rather than transfer it, select **Delegate.**
7. Click **Finish.**

Setting Publisher Work List Portlet Preferences

You can use the Work List - Personal Preferences page to set the maximum number of items that display for you in the Publisher Work List Portlet.

To access the Publisher Work List Portlet preferences, click the **Edit Portlet Preferences** icon in the Publisher Work List Portlet.

Viewing Workflow Assignment Details

The Workflow Assignment page provides information about the workflow definition, workflow activity, and assignment for a work item, along with assigned dates, due dates, and priority. You can also access the Content Item Editor, where you can edit the workflow item.

You can access the Workflow Assignment page from the following:

- Content Item Editor
- Publisher Work List Portlet
- Content Items in Workflow portlet

Overriding Workflow

Users in the Folder Administrator role and above can override workflow for a content item by using the **Override Workflow** page to remove the item from workflow or reassign it to another workflow activity.

To override workflow for a Content Item:

1. In Publisher Explorer, right-click the content item for which you want to override workflow and choose **Workflow**. This opens the **Override Workflow** page.
2. From the **Workflow Activities** list, select the workflow activity you want the item to be moved to, or select **Remove item from workflow.**
3. Click **OK**.
4. Click **OK** in the warning box.

Viewing Items in Workflow by Publisher Folder

To view all items in workflow in a given Publisher folder or set of folders, use the Content Items in Workflow portlet.

Before you can view workflow items in this portlet, you must first select folders for viewing using the Content Items in Workflow - Personal Preferences page.

Setting Preferences for the Content Items in Workflow Portlet

To set preferences for the Content Items in Workflow portlet, click the Edit Preferences icon in the portlet to access the Content Items in Workflow - Personal Preferences page, where you can do the following:

- In the **Folder Display Options** area, click **Add Folders** to access the Select Folders dialog, where you can select the Publisher folders whose workflow items you want to view. Only folders for which you have Submitter access or above appear in the dialog box.
- In the **Item Display Options** area, enter the maximum number of items you want displayed in the Content Items in Workflow portlet.

CHAPTER 13

Migrating Publisher Objects

The ALI portal administrative user interface allows administrators to import and export Publisher content.

This chapter includes the following topics:

- Exporting Publisher Objects
- Importing Publisher Objects to the Target Site

Introduction to Publisher Object Migration

Many Publisher implementations use a *development site* to create and test Publisher objects before exposing them to end users. The development site is a copy of the Publisher implementation on the *production site* that is accessible to end users. To support this configuration, Publisher objects can be moved between sites without disrupting settings using the ALI portal administrative user interface.

By using the Migration - Import and Migration - Export utilities on the portal Administration page, you can import and export Publisher folders, folder metadata and folder content.

You can also use the migration utilities to deploy objects and content to Publisher environments outside of your production, staging, or development sites. For example, you can use the utility to migrate custom applications, components, or portlet templates to various application developers, partners, or licensed customers.

You can migrate the following Publisher objects:

- Objects with internal relationships managed using UUIDs, such as portlets, portlet templates, users, and groups.

  You cannot migrate objects whose internal relationships are managed using object IDs, rather than UUIDs. These are objects like crawler links, saved search links, and publish to directory cards.

- Published content portlet objects such as Data Entry Templates, Presentation Templates, content items, file content items, and folders.

- Workflow definitions that are attached to folders.

You must also meet the following criteria for a successful Publisher migration:

- Objects can be migrated only between server instances of the same version.

- If you expire a publishable object, make sure that you are expiring it in the same site in which it was published. For example, if you publish an object in the production site, migrate it to the development site, expire it in the development site, and then migrate it to the production site, it will *not* be expired in the production site.

- Content items submitted to workflow must complete the workflow process prior to migration. If a content item that has not completed the workflow process is migrated, the item will not be in workflow in the target site.

Migrating Publisher objects is a two-step process:

1. Create a content package by exporting the objects from the source site.
2. Import the content package to the target site.

Exporting Publisher Objects

To migrate your Publisher objects, you must create a content package by exporting from the source site:

1. In the ALI portal, go to Administration.
2. In the **Select Utility** drop-down list, choose **Migration - Export**.
3. On the left, click **Publisher Resources**.
4. Launch the Folder picker window by clicking **Add Folders**.
5. Select one or more folders to export. Click **OK**.

6. The folders you selected are now listed under **Resources**. For each folder you can use the check boxes to choose whether or not Sub-folders, Folder Metadata, or Folder Content should be exported. Note:
   - By choosing Folder Metadata but not Folder Content, only folder settings will be exported.
   - If a folder listed is a sub-folder of another listed folder, the settings applied to the sub-folder will override the settings defined for the parent folder.
7. When you are satisfied with your folder selections, click **Finish**.
8. If prompted to confirm proceeding with the export, click **OK**. The command line export utility is not applicable to Publisher objects.

A window will display the status of the migration (successful), the name of the migration package (.pte), and the name of the content package (.zip). Make note of the name of the .zip file.

You will be prompted to save the migration package (.pte). The .pte file should be saved to your harddrive. In addition, the migrated project items are stored in a content package (.zip) in the following location:

<portal installation directory>\ptcs\<version>\settings\migration

You will need both files to import the package into the target site.

Importing Publisher Objects to the Target Site

After you have created a content package containing the folders you want to migrate, import the package into the target site by doing the following:

1. Copy the content package (.zip) to the following location on the target server before attempting to import the .pte:
   <portal installation directory>\ptcs\<version>\settings\migration.
2. In the ALI portal, go to Administration.
3. In the **Select Utility** drop-down list, choose **Migration - Import**.
4. Enter the File Path or Web Address of the migration package (.pte), or click **Browse** and find the migration package in your filesystem.
5. Click **Load Package**.
6. Navigate to the Publisher Resources page by clicking the link **Publisher Resources**, which appeared on the left when you loaded the package.

7. The Publisher Resources page displays the name of the content package (.zip) that is expected. Be certain that this file is in the **<portal installation directory>\ptcs\<version>\settings\migration** folder on the target server before you continue.
8. Choose **Yes** to overwrite existing objects. This option applies to every object that might be overwritten by an object in the package you are importing. Object overwriting is enforced by UUID and not by object name.
9. Click **Finish**.

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