Information Manager Content Authoring Guide

A Guide to Creating Content in Information Manager

InQuira Version 8.1.2

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InQuira
851 Traeger Ave.
Suite 125
San Bruno, CA 94066

Contents

Preface About This Guide

This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.

This preface includes information on:

- The general organization of this guide
- The support services available from InQuira Customer Support
- The available product documentation

In This Guide

The Information Manager Content Authoring Guide is divided into the following sections:

Contacting InQuira

You can contact InQuira by mail, telephone, fax, and email.

Address:	851 Traeger Ave. Suite 125 San Bruno, CA 94066
Telephone:	(650) 246-5000
InQuira Customer Support Hotline:	(888) 947-8324 NOTE: See *InQuira Customer Support* on page 3 for more information on reporting incidents to InQuira Customer Support.
Fax:	(650) 264-5036
Email:	For sales information, send email to sales@inquira.com. For product support, send email to support@inquira.com.
World Wide Web:	Learn more about InQuira products, solutions, services, and support on the world wide web at: www.inquira.com.

InQuira Customer Support

InQuira Customer Support is available from 6:30 am to 4:30 pm PST, excluding InQuira holidays.

For Priority 1 incidents, such as when a production system hangs or crashes, or when continued use of the product is impossible, please use the support hotline: (888) 947-8324.

IMPORTANT: We accept Priority 1 requests only by telephone. We recommend that you send a follow-up email for Priority 1 requests after contacting InQuira Customer Support using the support hotline.

For Priority 2, 3, and 4 incidents, as described below, please contact InQuira Customer Support by email at: support@inquira.com.

Incident response times are determined by the following priority definitions:

Priority	Contact	Response Time	Definition
1	The InQuira Customer Support hotline: (888) 947-8324	1 business hour	A production system hangs or crashes, or continued use of the product is impossible.
2	support@inquira.com	8 business hours	The product is usable with major restrictions on functionality.
3	support@inquira.com	16 business hours	The product is usable with minor restrictions on functionality.
4	support@inquira.com	3 business days	You have a question or an enhancement request pertaining to the software or the documentation.

InQuira Product Documentation

InQuira documentation is available only to licensed users of our software products and may not be redistributed in any form without express permission from InQuira, Inc.

The InQuira documentation is available in PDF format. It is packaged in the `/docs` directory, within the `/inquira` directory, for example:

<InQuira_install_dir>/inquira/docs

NOTE: You need a PDF reader application installed on each processor on which you plan to view the InQuira product documentation. The Adobe Acrobat reader is available from Adobe Systems at: http://www.adobe.com.

Detailed information about each product document set is available in:

- *Intelligent Search Documentation* on page 5
- *Intelligent Search Analytics Documentation* on page 6
- *Information Manager Documentation* on page 7
- *Contact Center Documentation* on page 8

If you encounter a problem, need help using the documentation, or want to report an error in the content, please contact InQuira Customer Support as described in *InQuira Customer Support* on page 3.

If you need help obtaining InQuira product documentation, or want to obtain permission to redistribute a portion of the contents, please contact your InQuira account representative.

Intelligent Search Documentation

Intelligent Search is distributed with the following documentation.

Document	Number	Description
Intelligent Search Installation Guide	IS80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira 8.1. It provides detailed information on installing InQuira 8.1 and configuring the application on a single processor using the Installation Configuration Environment facility.
Intelligent Search Administrator's Guide and Reference	IS80-CA-00	This guide is intended for system and application administrators who need to configure an InQuira 8.1 application in an enterprise environment. It describes InQuira 8.1 integration, development, configuration, and maintenance processes and tasks.
Intelligent Search Language Administration Guide	IS80-LA-00	This guide is intended for business users and subject matter experts who need to create and maintain the language processing elements of a InQuira 8.1 application using the System Manager. This book provides usage information about the System Manager, conceptual information about the InQuira 8.1 language objects, and task information about the process of managing the user experience provided by the InQuira 8.1 application.
Intelligent Search Tuning Guide	IS80-LD-00	This guide is intended for application developers who need to create and maintain advanced InQuira 8.1 language-processing elements using the Dictionary and other InQuira Language Workbench applications.
Optimizing InQuira Intelligent Search	IS80-AG-00	This guide is intended for application developers who need to implement InQuira 8.1 advanced features, including Personalized Navigation and Process Wizards.
Intelligent Search Application Developer's Guide	IS80-API-00	This guide provides information about integrating and customizing the InQuira 8.1 Personalized Response User Interface.

Intelligent Search Language Reference	IS80-LRG-00	This guide is for language developers implementing InQuira 8.1 applications that utilize the intent libraries and advanced language processing functions. These guides are published as separate documents that provide reference information for each industry-specific intent library. Each reference also contains complete descriptions of InQuira Match Language and Variable Instantiation Language.
Intelligent Search User Interface Guide	IS80-UI-00	This guide is intended for application developers who need to customize the InQuira 8.1 Personalized Response User Interface, and integrate it with a production web application. It contains information about the elements and features of the User Interface, and provides guidelines for integrating it into an enterprise web architecture, customizing its appearance and functionality, and implementing various special features.

Intelligent Search Analytics Documentation

Intelligent Search Analytics is distributed with the following documentation.

Document	Number	Description
InQuira Analytics Installation Guide	IA80-IG-00	This guide is intended for technical staff who are responsible for installing Intelligent Search Analytics. It provides detailed information on installing and configuring the Intelligent Search Analytics product for use with an InQuira 8.1 application.
Analytics User Guide	IA80-CA-00	This guide is intended for systems and application administrators who need to configure the Intelligent Search and Information Manager Analytics components to report on InQuira 8.1 application performance.

Information Manager Documentation

InQuira Information Manager is distributed with the following documentation.

Document	Number	Description
Information Manager Installation Guide	IM80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Information Manager. It provides detailed information on installing and configuring the Information Manager product.
Information Manager Administration Guide	IM80-CA-00	This guide is intended for systems and application administrators who need to configure and administer an InQuira Information Manager application, and integrate it with an InQuira 8.1 application. It also contains information for general business users who need to use the Information Manager to create and manage content.
Information Manager Content Authoring Guide	IM80-AG-00	This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.
Information Manager Developer's Guide	IM80-WSR-00	This guide is intended for application developers who need to integrate Information Manager content, content category, and user and security functions with external applications. It contains reference information and examples for all packages, classes, methods, and interfaces of the Information Manager Web Services API.

Contact Center Documentation

The InQuira 8.1 contact center products are distributed with the following documentation.

Document	Number	Description
Contact Center Advisor Integration Guide	CA80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira Contact Center Advisor with an InQuira application and a supported CRM application.
Intelligent Search Siebel Integration Guide	CAS80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate InQuira 8.1 with Siebel 7 Enterprise Applications using the Siebel Adapter for InQuira 8.1.

Screen and Text Representations

The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

References to World Wide Web Resources

For your convenience, we refer to Uniform Resource Locators (URLs) for resources published on the World Wide Web when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

Chapter 1 Getting Started

This chapter describes how to create and modify content in Information Manager. The topics are:

Log into the Management Console

To log onto the Management Console as a general user:

- Open the URL provided by the Information Manager administrator for your organization in a browser, for example:

  http://<host_name>:<port>/InfoManager/WebObjects/InfoMgr.woa

where:

`host_name`	Specifies the hostname for the system on which the application is installed, for example `localhost`, if applicable
`port`	Specifies the port designated for the Management Console application during the installation process. The default is `8080`.

Alternatively, you can start the Management Console using the shortcut created by the standard installation process:

- Select **Start -> Programs -> InQuira_8.1 -> Information Manager**

The Management Console login page displays:

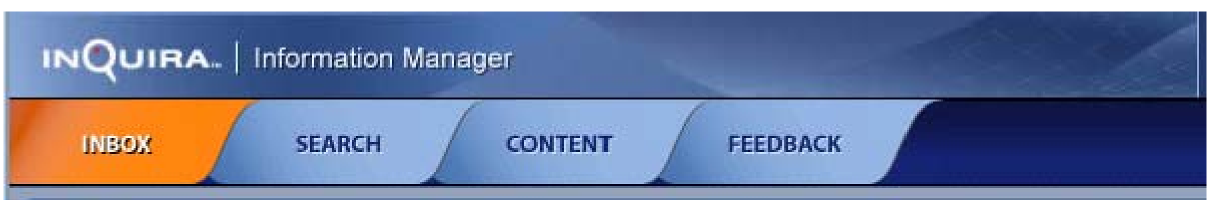
- Enter the user ID, password, and Repository information provided by your Information Manager administrator.

The Management Console displays the user's INBOX:

See *Listing INBOX Tasks* on page 70 for information on how to use the INBOX page.

An Author's View of the Management Console

An author's view of the Management Console varies, depending on the level of access granted to the author by the Information Manager Administrator. The main pages related to authoring content in Information Manager are shown below. This chapter provides a brief summary of the features on each page and directs you to the sections that describe how to use the features.



If you see additional tabs in your Management Console, see *An Administrator's View of a Content Repository* in the *Information Manager Administration Guide* for usage information.

INBOX Page

The INBOX page lists the tasks that are available and assigned to you.

Assigned tasks are tasks that an authorized user, such as a supervisor or administrator, has directly assigned to you. Available tasks are tasks that you are authorized to perform. You may also be authorized to assign tasks to other users.

Available tasks and task actions are determined by the task privileges assigned to the security roles associated with your user profile. See *Performing Tasks* on page 74 for more information on actions that users can perform.

To view your available and assigned tasks, select **INBOX** from the navigation area:

See *Chapter 3, Working with Tasks* for details on how to manage tasks in your task list.

You can use the following Filters function of the Task page to control the task display:

Filters	Use the filtering options to view tasks for specific users, assigned/ or unassigned tasks, for only open or closed tasks, or for a specific view, channel or locale. See *Filtering the Task List* on page 71 for details. NOTE: The users filter displays only to users who have privileges to view tasks for other users as described in Specifying Management Console User Properties.

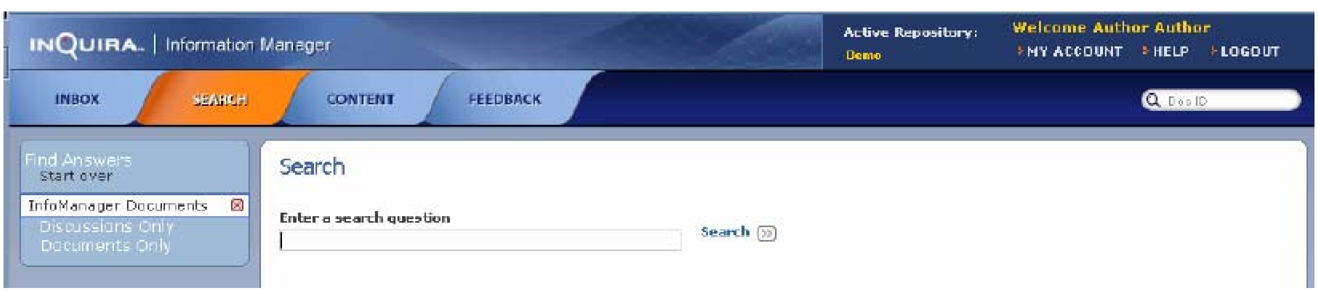
The Tasks page displays the following information for each task:

Age	This field displays how old the task is. Click on the link in the Age column to display the Task History page from where you can optionally perform the task or reassign it
Details	This field displays the master identifier for the task item. For content items, this is the document title. You can select this field to view details for this task as described in *Viewing Task Details* on page 72. You can sort the task list by Details.
Type	This field displays the type of task as described in *Action and Notification Tasks* on page 68. Authorized users can sort the task list by Type, and filter the task list by a selected task type.
Priority	This field displays the priority assigned to the task. Authorized users can sort the task list by Type, and filter the task list by a selected task priority.

SEARCH Page

The SEARCH page allows you to search through Information Manager records, forum posts, and other documents by means

The makeup of your search page depends on how it was configured by your administrator. In general, the Management Console search page will be configured to search the same content as the Information Manager client. Below is an example of a search page configured to search Information Manager content, discussion forums, and a documentation set.

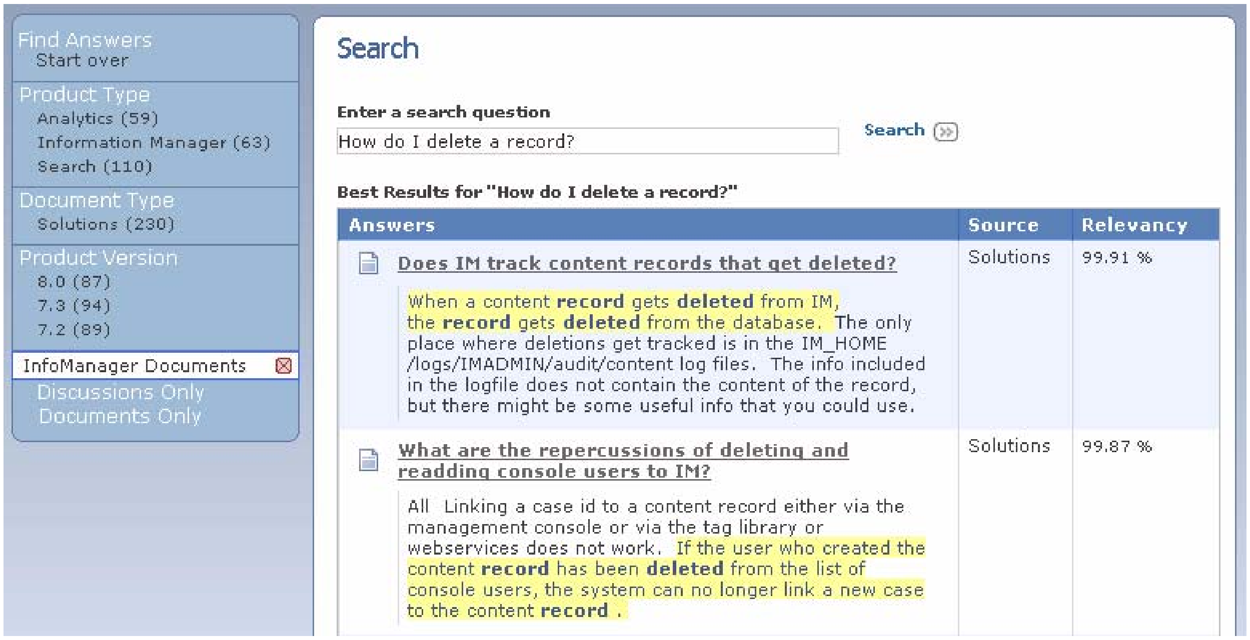


The SEARCH page displays the following information:

Start Over	Restart search.
InfoManager Documents	Select to search only Information Manager records.
Discussions Only	Select to search only posts in the Information Manager discussion forums.

Documents Only	Select to search only documents in the documentation set..
Search	Enter the search query in this field.

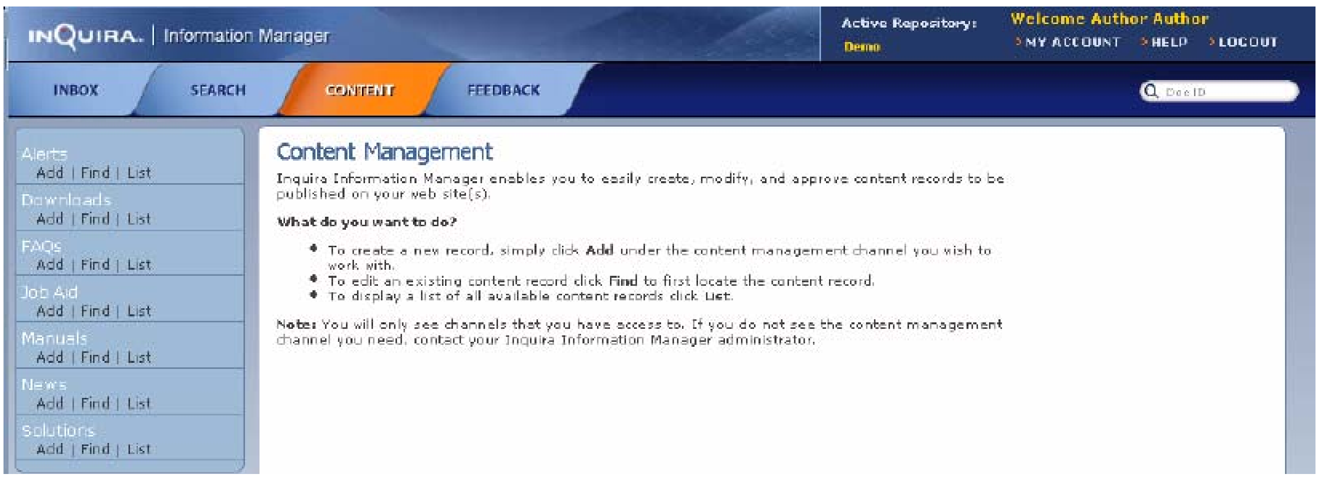
The results of the search query are displayed, along with the filters you can use to narrow down the results to a particular facet.



CONTENT Page

The CONTENT page lists all of the channels available to you. For each channel, you can:

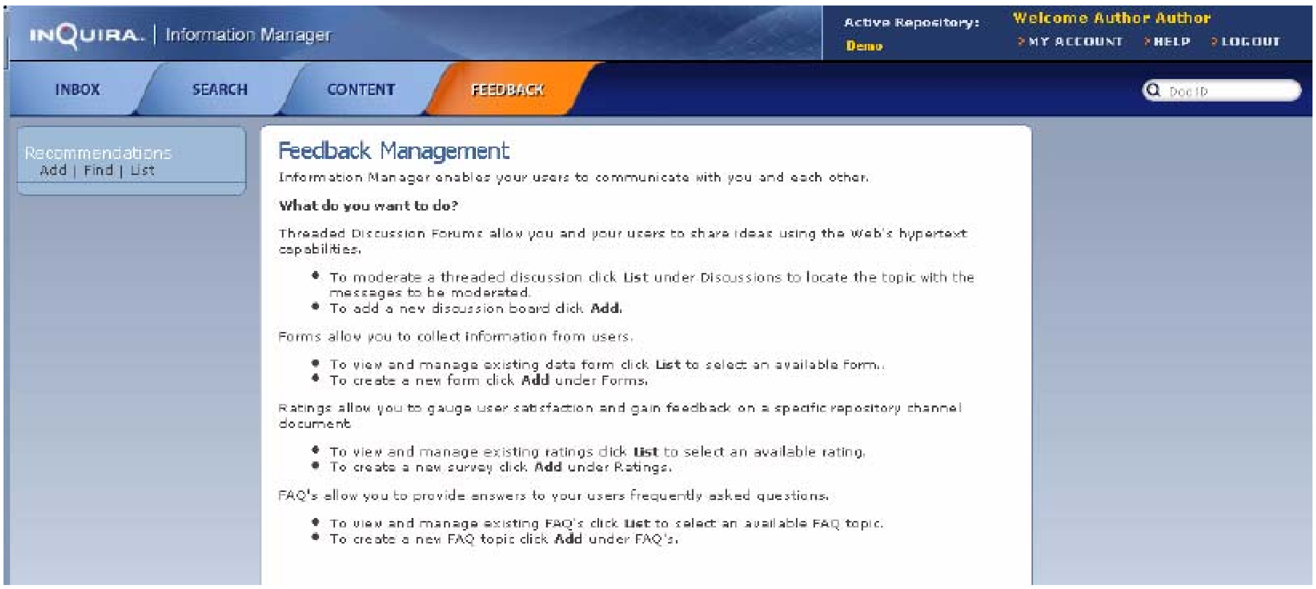
Add	Add a new record to the channel. See *Adding a New Content Record* on page 30 for details.
Find	Locate one or more records in the channel. See *Searching for Content* on page 23 for details.
List	List the records in the channel. See *Listing Content Records for a Channel* on page 22 for details.



FEEDBACK Page

For most authors, the FEEDBACK page enables you to **Add**, **Find**, and **List** content recommendations. You typically create a content recommendation when you are unable to locate a suitable answer to a question. See Recommending Content for details.

If you see more settings on your FEEDBACK page, see *Chapter 8, Feedback and Collaboration Features* in the *Information Manager Administration Guide*.

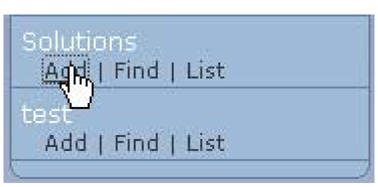


Create a Content Record

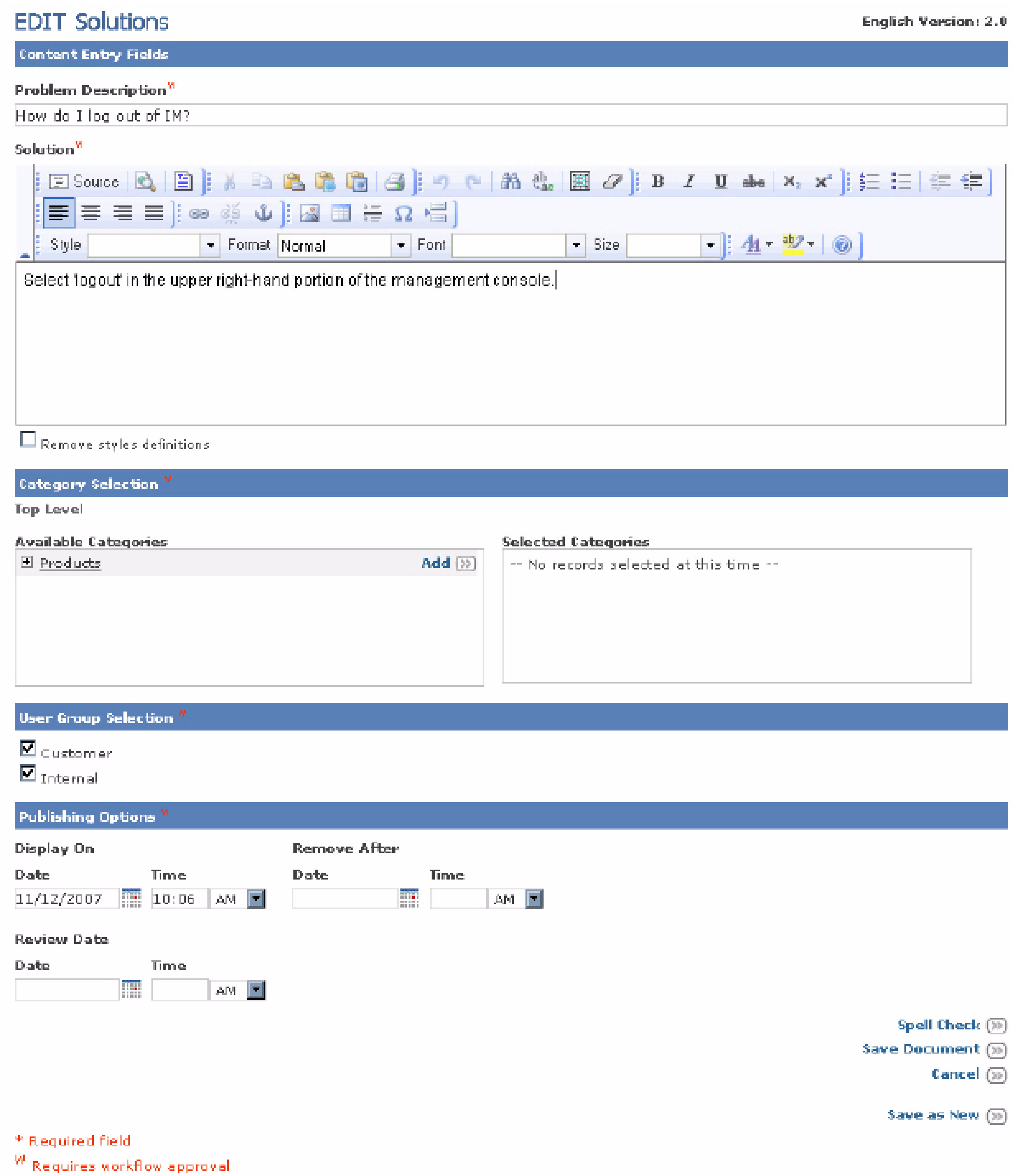
Your Information Manager administrator should have created a repository containing one or more channels. Open the **Content** tab and locate the channel in which you want to create a new content record. In this example, we are creating a new content record in the 'Solutions' channel.

Create a content record:

- Select the **Add** option for the channel in which you want to add content:



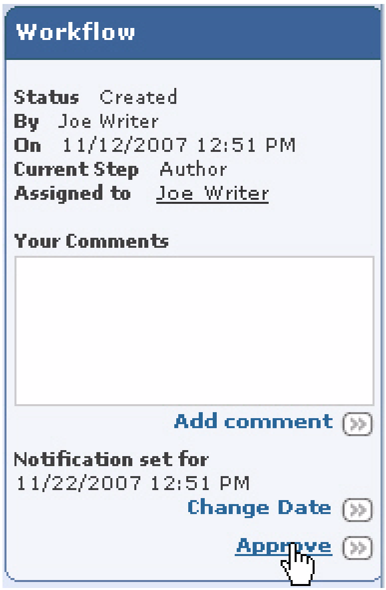
The Management Console displays the Add Solutions page for the selected channel. Fill in the fields as sown below:



- Select **Save Document**.

NOTE: The following assumes that the channel was set up with a 'Publish' workflow, as described in *Define a Workflow* in the *Information Manager Administration Guide*.

- In the Preview page, approve the Author step in the workflow by selecting **Approve** in the **Workflow** box:



The content record is then advanced to the Review step in the workflow and is listed in the INBOX for console users who have the Review workflow step selected in their console role.

See *Chapter 2, Working with Information Manager Content* for more information on creating and modifying content records.

Chapter 2 Working with Information Manager Content

You can add, modify, and remove application content using the Management Console. The basic units of content in Information Manager are called content records; see *Content Records* on page 20 for more information. You work with content in the Information Manager by creating or modifying content records. You create and maintain content by:

- Authoring the main body content intended for end users
- Specifying other required and optional data, such as publishing dates and meta-data

The optional and required data for a content record is determined by the content channel definition as described in Managing Content Channels.

You work with Information Manager content according to processes and privileges defined by your Information Manager administrator, including:

- The privileges assigned to your user ID as described in User Security Roles and Privileges
- The workflow process specified for the content channel in which you are working

Information Manager administrators can configure workflows to generate tasks and notifications, and assign tasks to users. Content-related tasks display in the Management Console INBOX, as described in *Chapter 3, Working with Tasks*.

You can also work with content in response to external requests or processes. The Management Console will automatically process any authorized work and record the progress within the defined workflow regardless of the point of access.

Content Records

A content record is analogous to an individual document of a particular type, such as a specific customer support case or press release. The Information Manager supports any number of types of content records. Each type of content record corresponds to a set of defined properties called a content channel as described in Content Channels.

Information Manager administrators define content channels to determine the required document structure and attributes (metadata) for the various types of content to be managed within your organization.

You access content records using the Content tab on the Management Console main page, as described in *Accessing the Information Manager Content Area* on page 20.

Accessing the Information Manager Content Area

You access the Information Manager content area from using the Content menu on the Management Console main page.

NOTE: You can also access content related to configured workflows and tasks from your INBOX, as described in *Chapter 3, Working with Tasks*.

To access the Information Manager content options:

- Select the **Content** menu item from the Management Console main page

NOTE: The Information Manager displays the Content options by default.

The Management Console lists the content channels and options that you are authorized to access.

You can select any of the available options at any time.

- Select the desired activity for the content channel in which you want to work:

Option	Description
Add	Use this option to create a new content record in the selected channel, as described in *Adding a New Content Record* on page 30.
Find	Use this option to search for content records in the selected channel, as described in *Searching for Content* on page 23.
List	Use this option to list all content records in the selected channel to which you have access (based on your user privileges), as described in *Listing Content Records for a Channel* on page 22.

Listing Content Records for a Channel

You can list all of the records that are available to your user role for a selected channel using the List option. The Management Console lists content records using the value of one or more fields specified in the content channel definition. The fields used to create the item titles within the list are called master identifiers.

For each record, the Management Console lists the summary information described in Viewing Content Record Listings.

You can sort the list by various criteria in either ascending or descending order, as described in Sorting Content Records within a List.

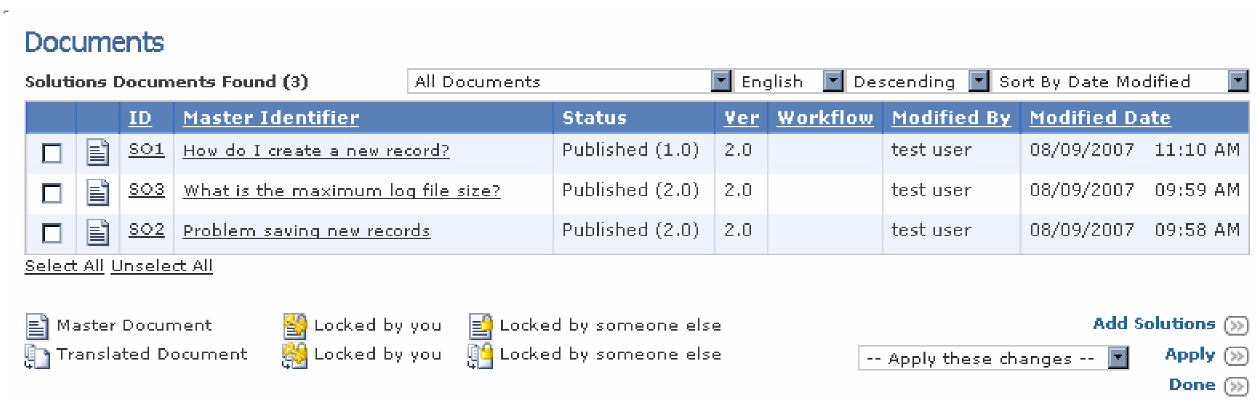
If the number of content records exceeds the capacity of the initial page, the Management Console provides links to subsequent pages.

NOTE: Use the Find option to locate particular records within large collections of content.

To list the content records within a selected channel:

- Select the List option for the channel in which you want to add content, for example:

The Management Console displays a new content page, for example:



Searching for Content

You can search for content records using either the Find function for the channel on the CONTENT page, or entering a query in the SEARCH page, as described in *SEARCH Page* on page 13.

The Management Console Find function provides options to search for records based on the content of specified attributes, or using full-text search.

Full-text search matches your search query against the contents of any content record attributes that are available for searching. Attribute-based search restricts matching to only the specified attribute.

For example, you could use full-text search to locate all content records containing the word `virus` in any attribute. Alternatively, you could use attribute-based searching to locate only content records containing the word `virus` in their title.

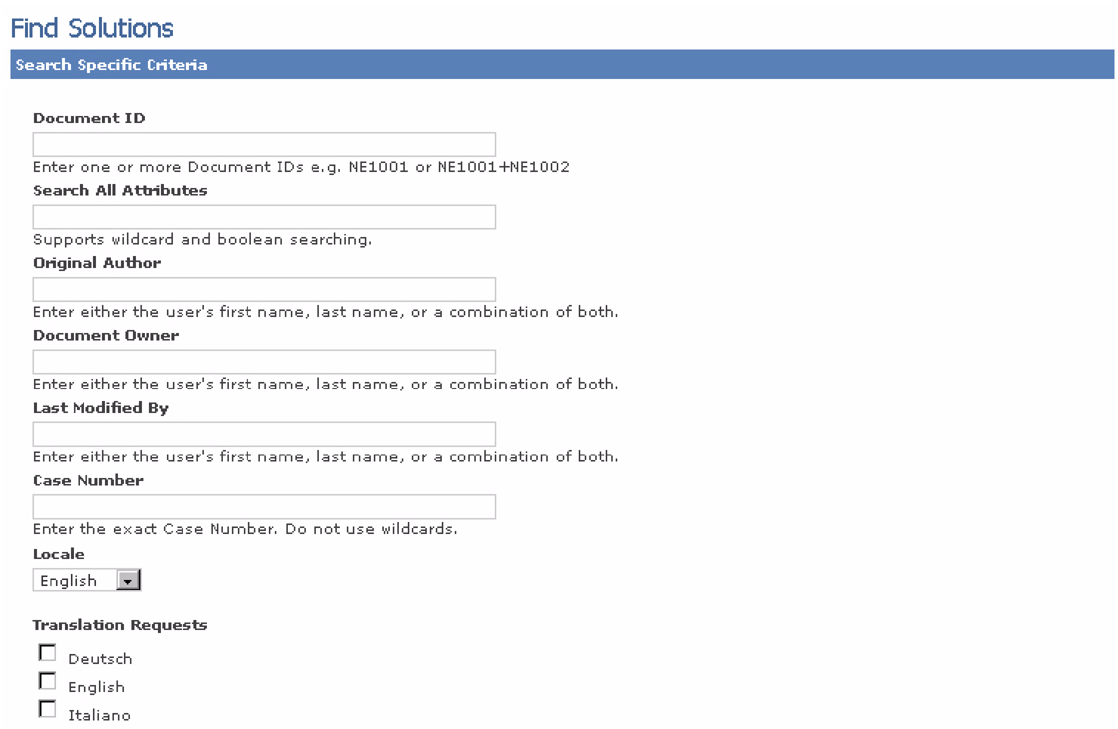
The attributes of the content record that are included in full-text and attribute-based searching are specified in the content channel definition as described in Specifying Search Options for Channel Attributes.

In addition, you can restrict results by publishing dates and categories.

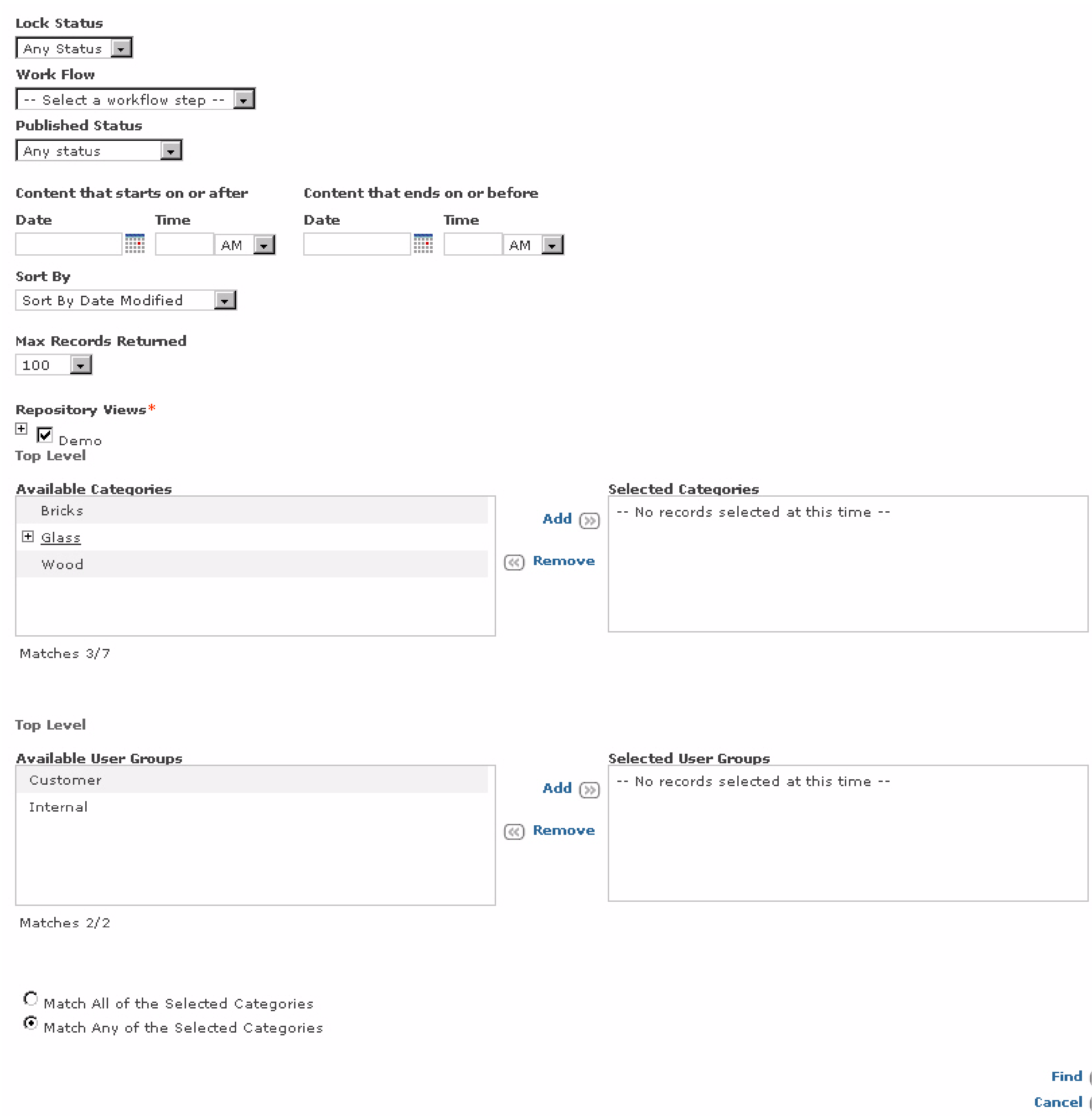
To search for content:

- Select the **Find** option for the channel in which you want to locate content, for example:

The Management Console displays a Find page for the selected channel. For example, the first part of the Find page looks like:



The second part of the Find page looks like:



The Find <channel> page displays various required and optional form fields.

- Enter the desired search criteria.

NOTE: If there are more than 100 categories and/or user groups, you will see a search box you can use to locate a subset of the categories or user groups.

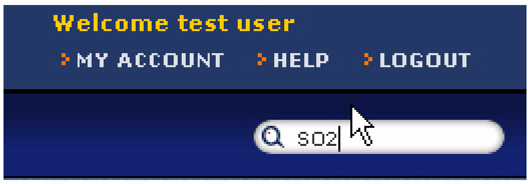
- Select whether to match **Any** or **All** of the selected search criteria.

- Select **Find**

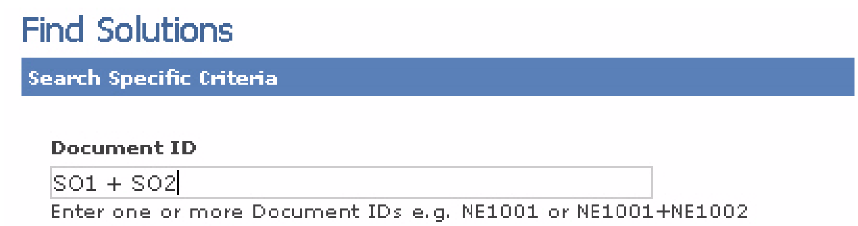
The Information Manager displays the search results page, as described in *SEARCH Page* on page 13.

Searching for Content by Document ID

Every Information Manager content record is associated with an ID. To locate a record by ID, enter the ID of the record in the "magnifying glass" field in the upper right hand corner:

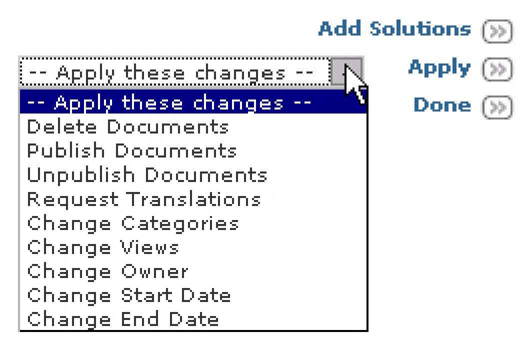


Alternatively, you can use the **Find** option for the channel and enter one or more record IDs separated by '+' signs



Batch Operations on Multiple Records

From the document list generated by either a **Find** or **List** on the channel, you can perform batch operations on selected content records simultaneously.

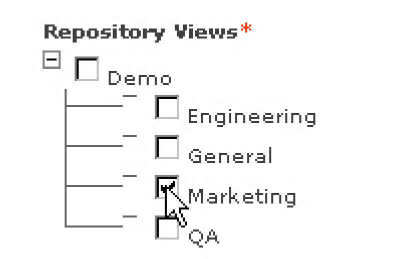


The batch operations are:

Operation	Description
Delete Documents	Delete all selected documents from the channel.
Publish Documents	Publish all selected documents.
Unpublish Documents	Unpublish all selected documents.
Request Translations	Request translations for all selected documents.
Change Categories	Change categories for all selected documents.
Change Views	Change views for all selected documents.
Change Owner	Change the owner of all selected documents.
Change Start Date	Change the start date for all selected documents.
Change End Date	Change the end date all selected documents.

For example, you want to change all records configured for the 'Marketing' view to the 'General' view. To do this:

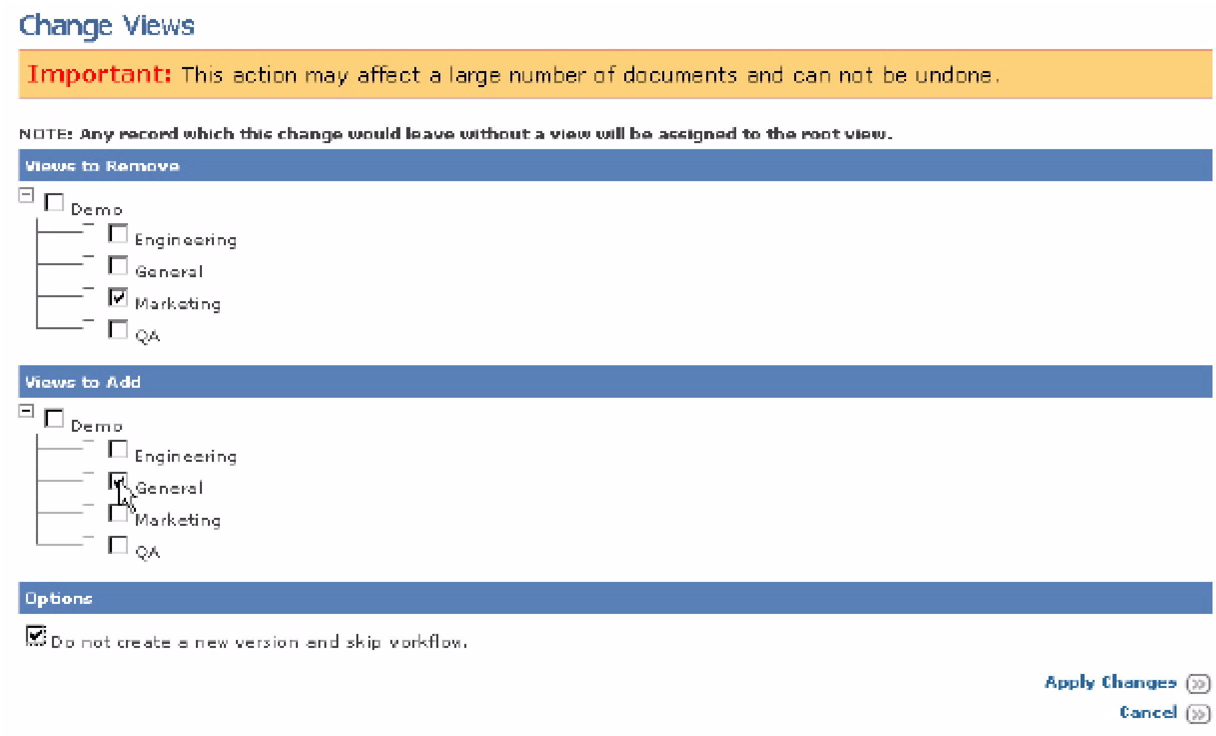
- Find all content records with the 'Marketing' view.



- Select all of the records returned in the list.
- Select **Change Views**
- Select **Apply**

- In **Views to Remove**, select Marketing.
- In **Views to Add**, select General.

- Select **Do not create a new version and skip workflow**.



Adding a New Content Record

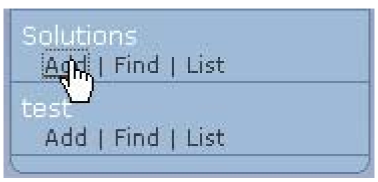
You add content to Information Manager by creating a new record in the appropriate channel and entering required and optional information.

IMPORTANT: The Management Console does not automatically save data as you edit fields. You must explicitly save your work using the **Save** option provided on the edit pages. If you select a different task or navigate to another page prior to saving your work, you will lose any unsaved data.

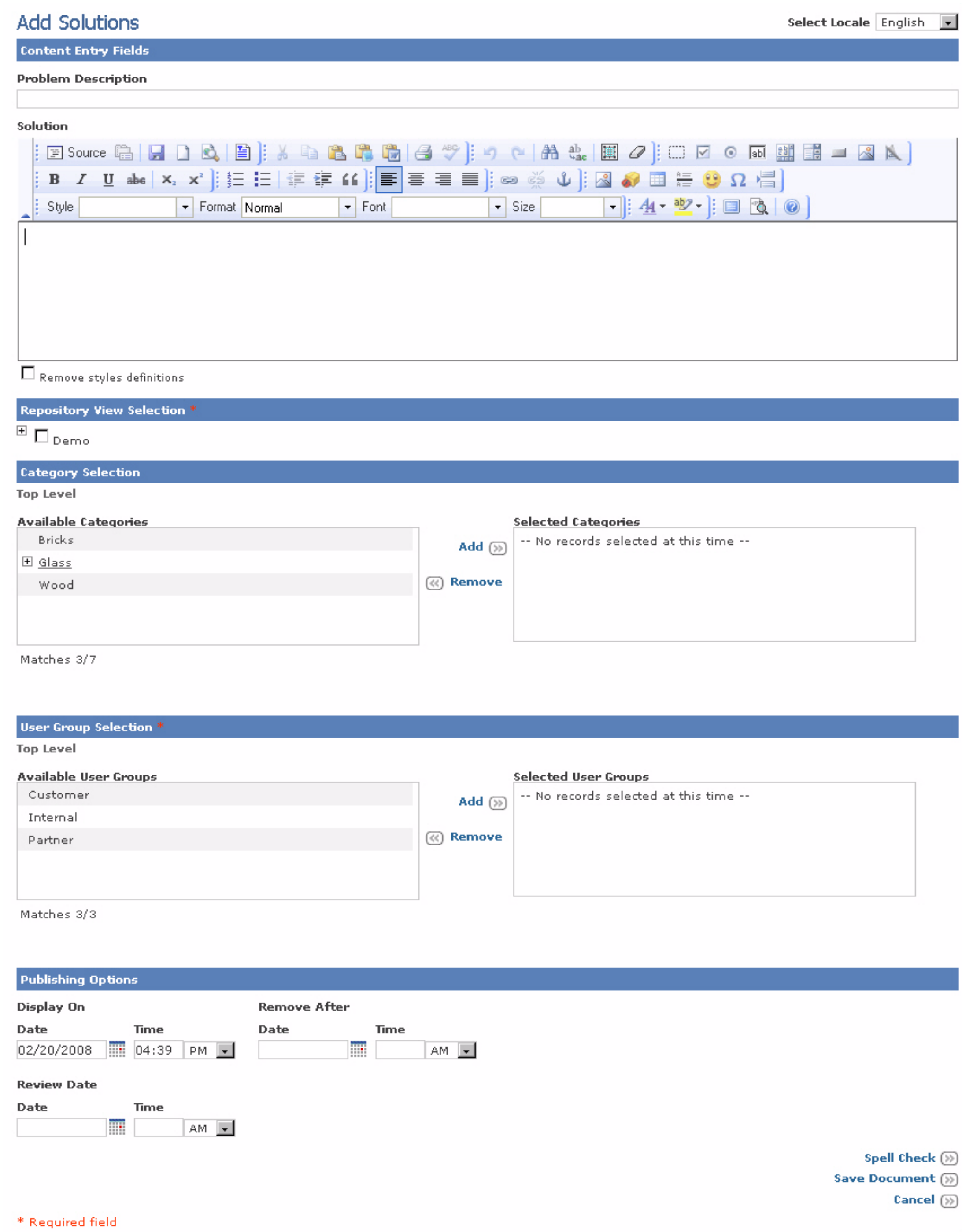
When the content record is complete, you can save and review the record, and submit it for approval or publication, depending on the defined workflow and your user role.

To add a content record:

- Select the **Add** option for the channel in which you want to add content, for example:



The Management Console displays the Add Content page for the selected channel, for example:



The Add Content page displays various required and optional form fields, which are determined by the content channel definition.

NOTE: Content channels are defined as part of the Information Manager administration process.

Red asterisks (*) indicate required fields. If you omit required information, the Information Manager displays an error message.

- Enter the required and optional information. See *Filling in Content Record Fields* on page 33 for an example.
- Select **Save Document**. If no workflow is enabled on the channel, you can optionally select **Save and Publish Document** to publish the record.

The Management Console displays a preview of the new content record as described in *The Content Preview Page* on page 37.

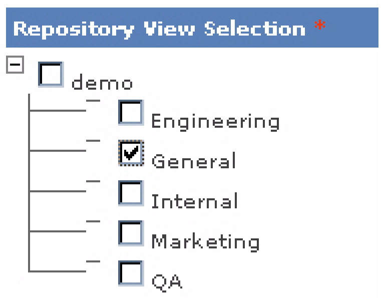
Filling in Content Record Fields

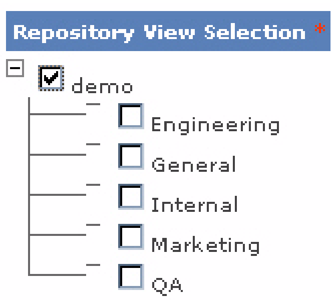
You add a content record to the Information Manager by entering required and optional information as specified in the content channel definition.

The following example contains information fields defined to create an article in the example Solutions channel shown in the previous section.

- Specify the following required and optional fields:

Field	*Description*
Title	This is an example of a required field in which you enter the record title. This field is used as the Master Identifier for the record, so it will appear in the Master Identifier column in the content list, as shown in *Listing Content Records for a Channel* on page 22.
Description	This is an example of a field in which you enter the main contents of the record using a rich text editor, called FCKeditor. For details on how to use the FCKeditor, see the *FCKeditor User Guide* and check out the *demo*. For troubleshooting problems, see *FCKeditor Troubleshooting*. The example field contains text formatting functions which you can use to add inline formatting to the content. This formatting is independent of, and intended to be complimentary to, any formatting that the web client will impose on the content. NOTE: The available editing and formating functions are specified in the channel definition on an individual field basis, as described in *Specifying a Channel Schema* in the *Information Manager Administration Guide*.

<table>
<tr>
<td>Repository View Selection</td>
<td>
This field enables you to select the views through which the content record can be accessed on the Management Console. Users without corresponding views cannot access the content record.
When working with a view hierarchy, it is important to understand that selecting a view higher up in the hierarchy excludes users assigned the views lower in the hierarchy from accessing the content record.
Consider the following view hierarchy:


In this example, users assigned either the demo or the General view can access the content record.
In contrast, if only the demo view was selected for the content record, then only users assigned the demo view can access the content record.


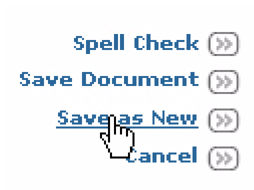
</td>
</tr>
</table>

Category Selection	This field lists content categories and sub-categories to associate with this record. For example, you could specify that this record is relevant to the Products or Services categories, or any number of their sub-categories. If there are more than 100 categories, you will see a search box you can use to locate a subset of the categories. NOTE: Unlike the View Selection described above, selecting a category automatically includes any sub-categories.
User Group Selection	This field lists which user groups can view the content record in the web client. If there are more than 100 user groups, you will see a search box you can use to locate a subset of the user groups.
Publishing Options	These fields specify valid publication dates for the content record, for example:  **Display On** specifies the initial date and time that the record will be available to web site users. The Management Console uses the current date and time as the default. **Remove After** specifies the final date and time that the record will be available to web site users; however the record will still remain in the repository and can be re-activated by changing the publishing dates. **Review Date** specifies the date the content is to be flagged for review. NOTE: The Information Manager contains a setting for default number of days, which sets the expiration date for a content record relative to its creation date.

Priority/Order	This example field specifies a numerical ranking value for this item that will influence its position in a list of web search results: 

Creating a New Content Record from an Existing Record

You can create a new content record from an existing record by editing the existing record and selecting **Save as New**:



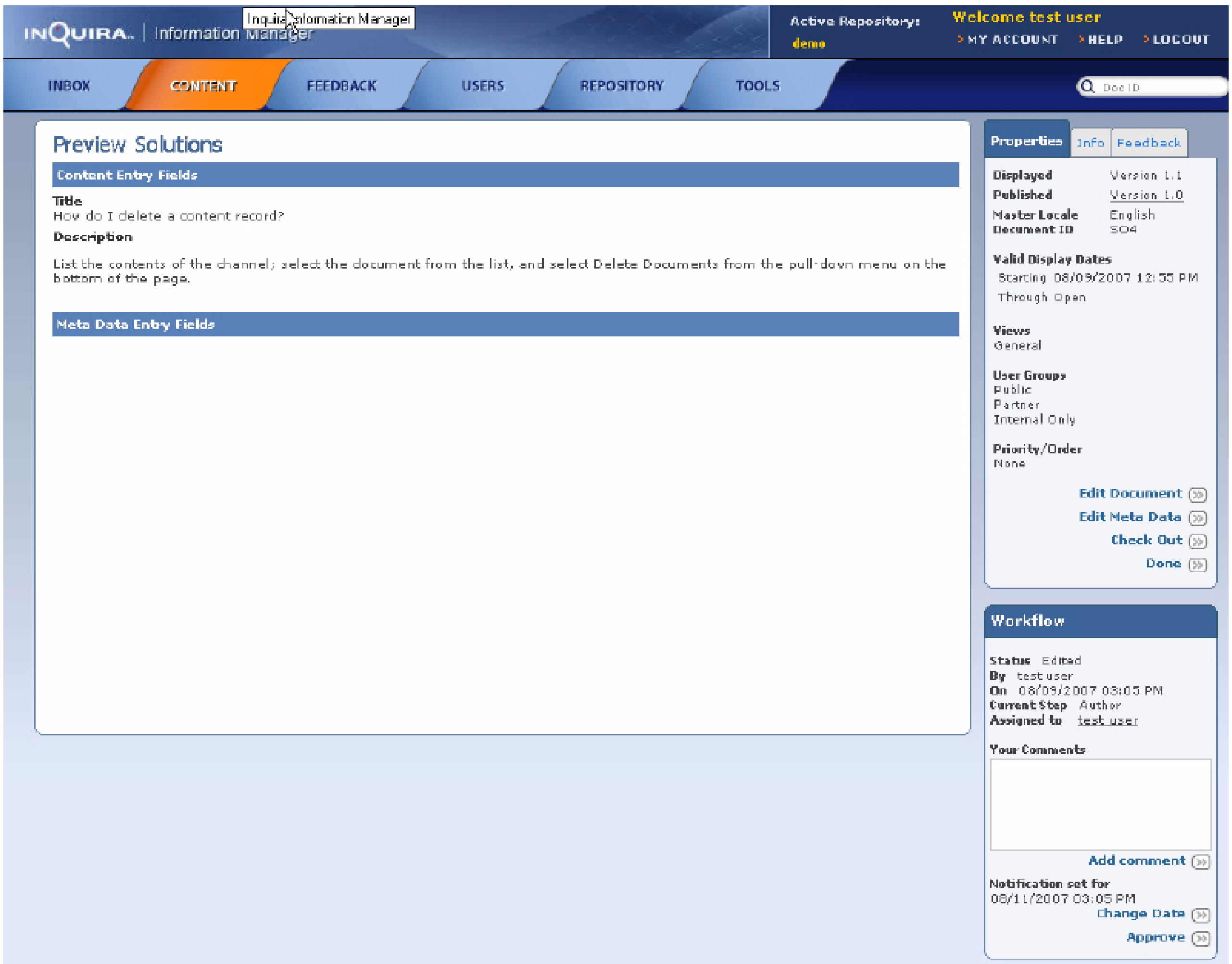
Information Manager creates a duplicate of the existing record and assigns it a new Document ID.

The Content Preview Page

The Management Console displays the preview page when:

- You save a new or modified content record
- You select a content record as part of a workflow approval process

The following preview page is an example of the FAQ example specified in *Filling in Content Record Fields* on page 33:



The example preview page displays the following information about the content record:

- The content section, as described in *The Content Section of the Preview Page* on page 38.
- The Content Data section, as described in *The Content Data Section of the Preview Page* on page 40.

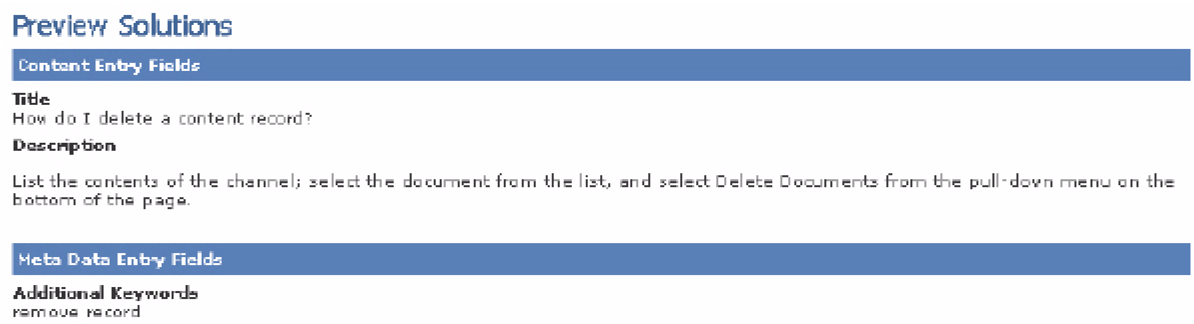
- The Workflow section (if applicable), as described in *The Workflow Section of the Preview Page* on page 45.

The preview screen does not format the content as it will be displayed in the web client. The formatting in the web client is controlled by presentation templates.

NOTE: The Management Console also displays the preview page when you select the record as part of a content approval step within a workflow process.

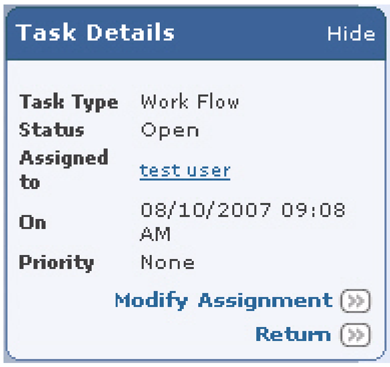
The Content Section of the Preview Page

The preview page displays the content that you entered for all the defined fields in the channel, for example:



The Task Details

When a record is in a workflow, a Task Details section appears in the record preview page for users assigned the workflow task.



Attribute	Description
Task Type	This field displays the type of task. See *Action and Notification Tasks* on page 68 for the list of task types.
Status	This field displays the current status of the record, such as **Open**, **Closed**, ???
Assigned to	This field displays the name of the user to which the current workflow task is assigned. User with the proper permissions can click on the named user to access the **Task Assignment** page and assign the task to another user. **Note:** When assigning a workflow task to a user, only users with permission to perform the particular workflow task will appear in the **User** pulldown menu in the **Task Assignment** page. Contact your Information Manager administrator if your are unable to assign the task to the correct user.
On	Date and time the task was assigned to the user.
Priority	The priority (None, Low, Medium, or High) given to the task. By the user who assigned the task.

Modify Assignment	Select to access the **Task Assignment** page and assign the task to another user.
Return	Select to go back to the previous page.

The Content Data Section of the Preview Page

The Content Data section of the preview page is divided into tabs that display information:

Properties	See *Content Properties* on page 40
Info	See *Content Info* on page 42
Feedback	See *Content Feedback* on page 44

Content Properties

Select the **Properties** tab to view the properties of the content record, or to check out or modify the content record:

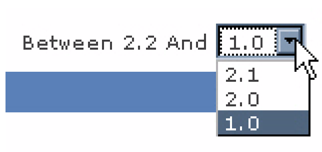
Attribute	Description
Displayed	This field displays the current version level of the content record. See *Viewing Content History* on page 49 for more information on how the Information Manager manages content versions.
Published	This field displays the level of the published version of this record, if applicable.
Master Locale	The original language used to author the content record.
Document ID	The document ID of the content record.
Valid Display Dates	This field displays the dates between which this content record is available for publishing. The Information Manager administrator can set an optional default number of days that a content record is valid, which automatically sets the end date relative to the initial publishing date for the record. Content authors and editors can be override the default by specifying explicit publishing date attributes for individual content records. Records that have no default or explicit publishing dates will never expire.
Views	This field lists any repository views to which this record is assigned. The Information Manager administrator assigns content to repository views on the basis of the content channel definition. See Repository Views for more information about repository views.
User Groups	This field lists the views associated with the content record.
Priority/Order	This field lists the priority value assigned to this record. Authors and editors can assign a priority value to a record to influence its position in a list of records returned by a runtime request, for example in a list of articles generated by a search on your web site.
Edit Document	Select to edit the content record, as described in *Modifying Existing Content* on page 46.
Edit Meta Data	Select to add or edit the record meta data. The meta data will appear in the content preview page but not in the content displayed in the web client.
Check Out	Select to lock the record and prohibit other users from editing the record.

Done	Select when finished to return to the previous Management Console page.

Content Info

Select the **Info** tab to view or modify the authoring information associated with the content record:

Attribute	*Description*
Owner	This field displays the original author of the content record. Select Change to change the content record owner.
Created	This field displays the date the content record was created.
Last Modified	This field displays the user and date for the last update to the content record. Select **History** to view each edit made to the document, as described in *Viewing Content History* on page 49.
Review Date	This field displays the review date, if set in the content record.
Add Related Content	Select to associate this record with one or more other records. See *Related Content Records* on page 50.
Redirect Document	Select to re-direct links to this record to a superseding record. See *Redirecting Content Records* on page 52 for details.

Search For Similar Content	Select to search Information Manager for another content records. This is simply a shortcut to the Search page accessed via the SEARCH tab. See *Searching for Content* on page 23 for details.
Compare Versions	Select to display the differences between the current version of the record and a previous version. The differences between the records are displayed as editorial deletes and inserts.  See *Comparing Record Versions* on page 55 for more information.
Side by Side View	Compare selected versions of the record, side-by-side. See *Comparing Record Versions* on page 55 for more information.
Done	Select when finished to return to the previous Management Console page.

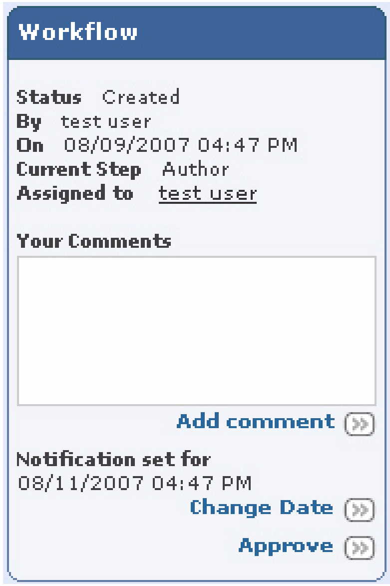
Content Feedback

Select the **Feedback** tab to view or modify comments and case links associated with the content record:

Attribute	Description
Content Metrics	This field displays default and custom content metrics associated with the channel definition: Count: the number of times that this content record was requested by the application in response to a query. Accessed: the number of times end-users accessed this content.
Case Links	This field displays all of the cases linked to this content record.
Reuse Count	This field displays the sum of case links for this content record.
Document Value	This field displays the sum of all incident values associated with the case link. Each case can have a value associated with it and be updated when linking the solution to the case. If incident values are not provided, then the Document Value = Reuse Count.
Manage Case Links	Select to associate this record with a specific case. See *Linking Cases to Content Records* on page 58 for details.
Add Recommendation	Select to add a comment on the content record. See Recommending Content for details.

The Workflow Section of the Preview Page

The Workflow section of the preview page displays information about the workflow process defined for the channel, and the current status of the record.



Attribute	Description
Status	This field displays the current status of the record, such as **Created**, **Edited**, ????
By	This field displays the name of the last user to update the record.
On	This field displays the date the record was last updated.
Current Step	This field displays the current workflow step. For example, the step **Author** indicates that the record has been created and is ready to be approved by the author to advance to the next step in the workflow.

Assigned to	This field displays the name of the user to which the current workflow task is assigned, or **Unassigned** if the task is not yet assigned to a user. User with the proper permissions can click on the named user to access the **Task Assignment** page and assign the task to another user. **Note:** When assigning a workflow task to a user, only users with permission to perform the particular workflow task will appear in the **User** pulldown menu in the **Task Assignment** page. Contact your Information Manager administrator if your are unable to assign the task to the correct user.
Your Comments	This field allows you to add comments for the user performing the next step in the workflow. These comments will appear along with the task in the user's INBOX.
Notification set for	[Confirm this...] Displays the date/time for Information Manager to send the next workflow task notification email to the assigned user, if no action is taken on the task before that date. Select **Change Date** to change the notification date and time.
Approve	Select to approve this workflow task and advance the record to the next step in the workflow.

Modifying Existing Content

You modify existing content records by locating the desired record, editing the record, and saving your changes.

When you save a modified record, the Management Console displays the preview page as described in Reviewing Content, which you can use to review the record and submit it for approval or publication, depending on your user role and the defined workflow.

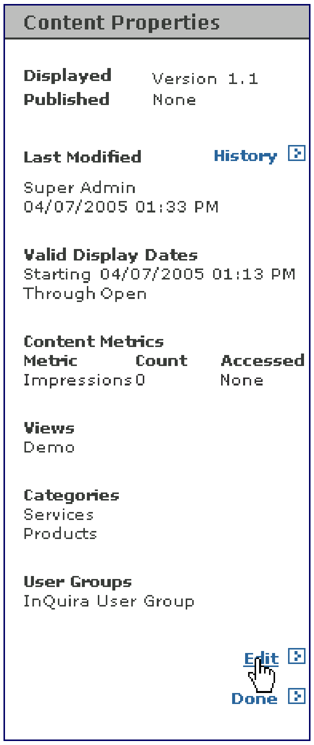
IMPORTANT: The Management Console does not automatically save data as you edit fields. You must explicitly save your work using the <tbd> Save option provided on the edit pages. If you select a different task or navigate to another page prior to saving your work, you will lose any unsaved data.

To edit a content record:

- Select the record of interest from a list, a task list, or a list of search results

The content Preview page displays.

- Select the **Edit** option from the Content Properties section of the Preview page:



The Management Console displays the Edit Content page.

The Edit Content page displays the various required and optional form fields, which are determined by the content channel definition. See *Filling in Content Record Fields* on page 33 for an example of adding information to a content record.

- Enter the required and optional information
- Select **Save Only**

The Information Manager displays a preview of the new content record, as described in *The Content Section of the Preview Page* on page 38

Invalid Characters

Some special characters are removed from Information Manager records during the save process. These characters are the Hexidecimal versions of the unicode characters.

Characters between the following ranges are removed:

0x00 and 0x08 (Control Characters --> NUL, SOH, STX, ETX, EOT, ENQ, ACK, BEL, BS)

0x0B and 0x1F (Control Characters --> CR, SO, SI, DLE, DC1, DC2, DC3, DC4, NAK, SYN, ETB, CAN, EM, SUB, ESC, FS, GS, RS, US)

The following characters are invalid:

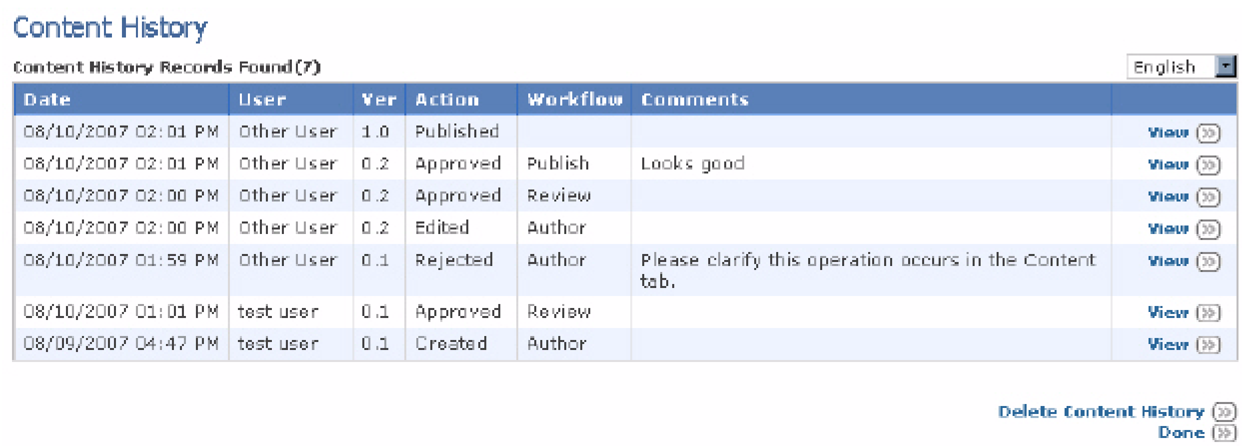
```
0x7F and 0x84
0x86 and 0x9F
0xFDD0 and 0xFDDF
0x1FFFE and 0x1FFFF
0x2FFFE and 0x2FFFF
0x3FFFE and 0x3FFFF
0x4FFFE and 0x4FFFF
0x5FFFE and 0x5FFFF
0x6FFFE and 0x6FFFF
0x7FFFE and 0x7FFFF
0x8FFFE and 0x8FFFF
0x9FFFE and 0x9FFFF
0xAFFFE and 0xAFFFF
0xBFFFE and 0xBFFFF
0xCFFFE and 0xCFFFF
0xDFFFE and 0xDFFFF
0xEFFFE and 0xEFFFF
0xFFFFE and 0xFFFFF
0x10FFFE and 0x10FFFF
```

Viewing Content History

You can view the history of a content record using the Content History page. Authorized users can delete history information.

The history page displays:

- The date and time the record was saved
- The users who have saved each version of a record
- The record version. The record version is incremented by a tenth (or dot value) each time it is edited. Each time the record is published, it is incremented by one.
- The workflow step at which the record was saved
- Comments entered during the workflow approval process


Content History

Content History Records Found(7)

English

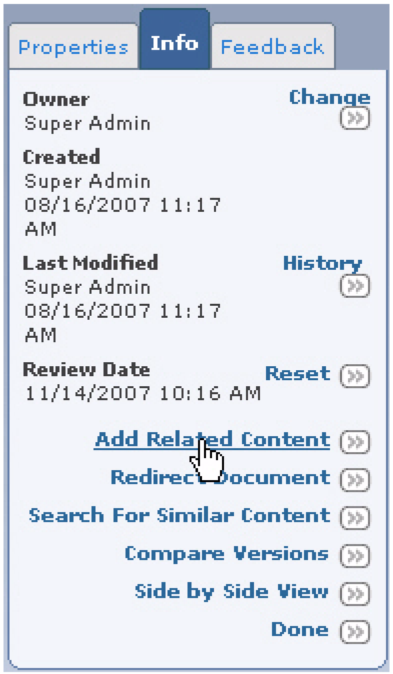
Date	User	Ver	Action	Workflow	Comments	
08/10/2007 02:01 PM	Other User	1.0	Published			View
08/10/2007 02:01 PM	Other User	0.2	Approved	Publish	Looks good	View
08/10/2007 02:00 PM	Other User	0.2	Approved	Review		View
08/10/2007 02:00 PM	Other User	0.2	Edited	Author		View
08/10/2007 01:59 PM	Other User	0.1	Rejected	Author	Please clarify this operation occurs in the Content tab.	View
08/10/2007 01:01 PM	test user	0.1	Approved	Review		View
08/09/2007 04:47 PM	test user	0.1	Created	Author		View

Delete Content History

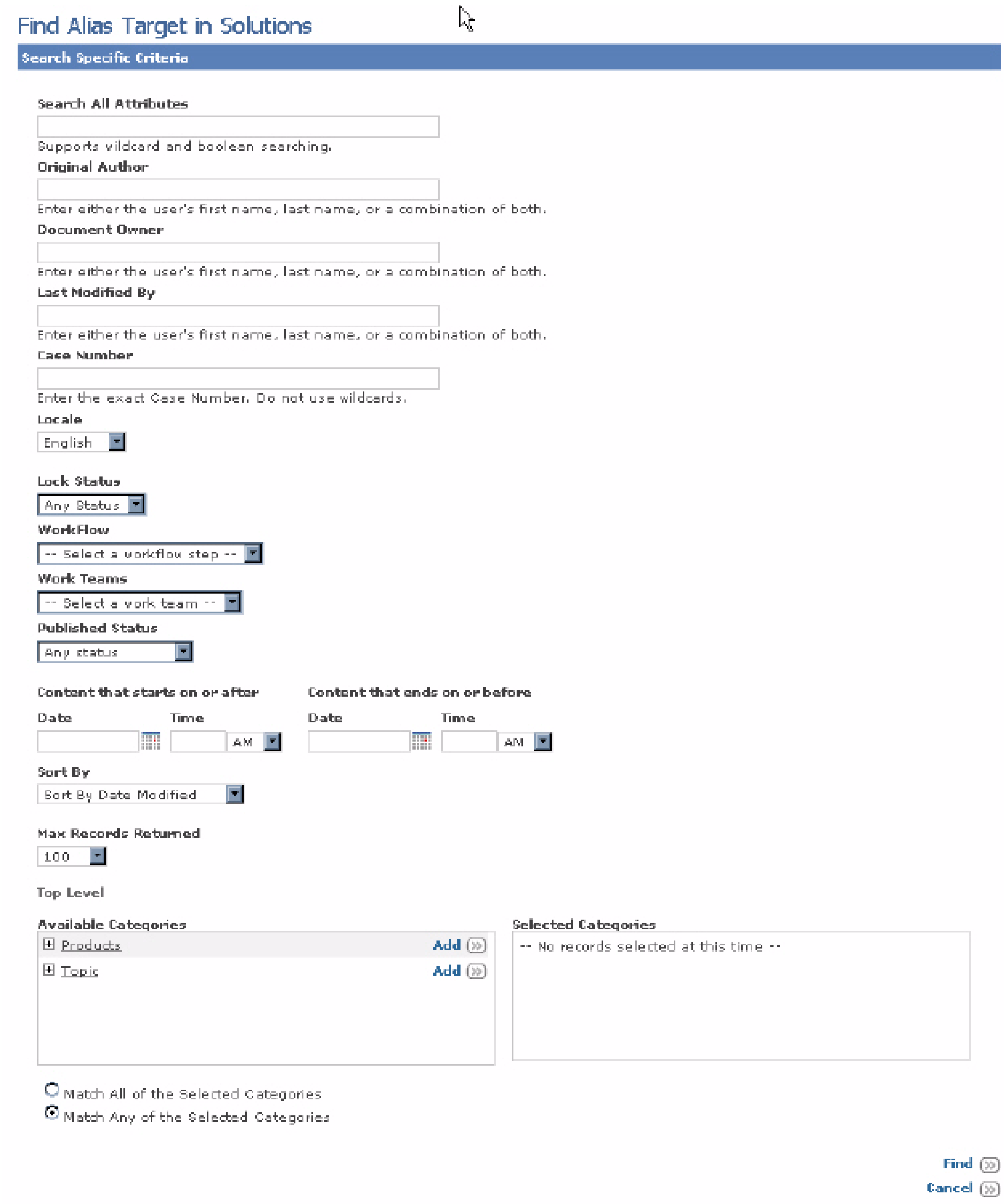
Done

Related Content Records

You can associate a record with one or more other records. To associate the current record with other records, select **Add Related Content**:



This will bring up a Find Alias Target page. Enter text and/or other attributes to locate the desired content records, select the records from the returned list, and select **Related Selected Records**.

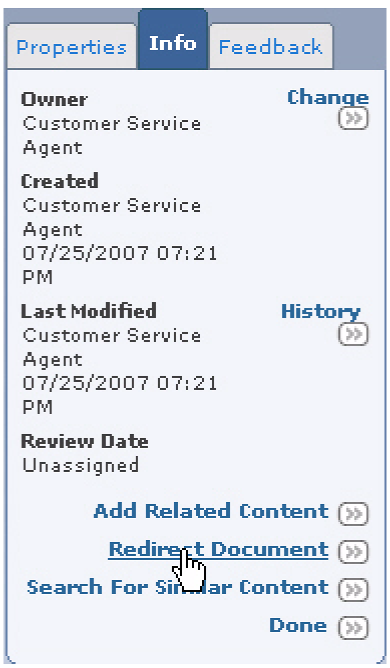

Find Alias Target in Solutions
Search Specific Criteria
Search All Attributes
Supports wildcard and boolean searching.
Original Author
Enter either the user's first name, last name, or a combination of both.
Document Owner
Enter either the user's first name, last name, or a combination of both.
Last Modified By
Enter either the user's first name, last name, or a combination of both.
Case Number
Enter the exact Case Number. Do not use wildcards.
Locale
English
Lock Status
Any Status
WorkFlow
-- Select a workflow step --
Work Teams
-- Select a work team --
Published Status
Any status
Content that starts on or after
Date
Time
AM
Content that ends on or before
Date
Time
AM
Sort By
Sort By Date Modified
Max Records Returned
100
Top Level
Available Categories
Products
Add
Topic
Add
Selected Categories
-- No records selected at this time --
Match All of the Selected Categories
Match Any of the Selected Categories
Find
Cancel

The related content records then appear in the content data section of the preview page:

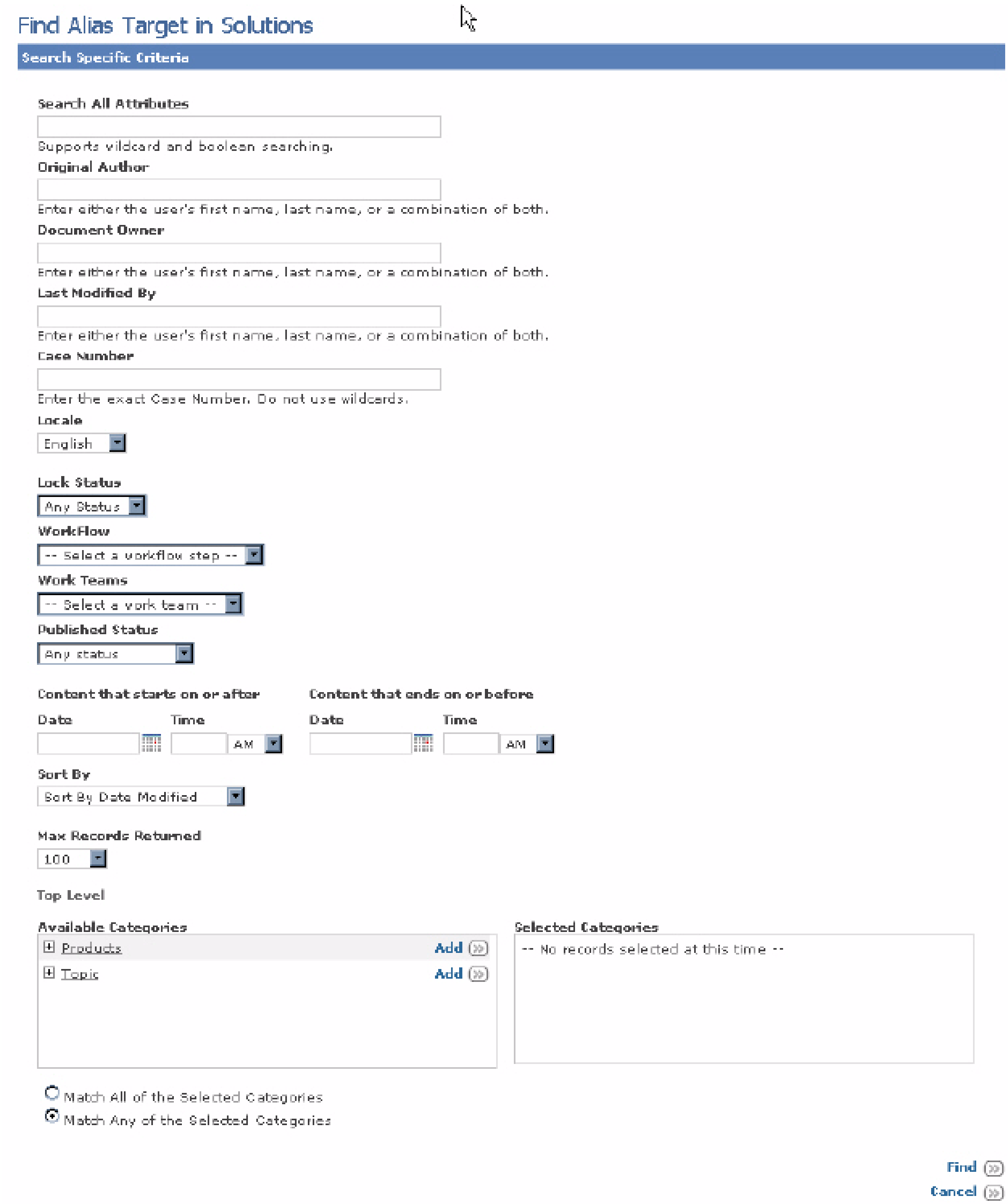
Redirecting Content Records

When a record is made obsolete by a newer, similar record, you can redirect links created to the old record to the new record. Though the old record is still available through the Management Console, only the redirected-to record appears in the search results on the client. This redirection is done on the Information Manager client through the Information Manager tag library and is external to the Management Console.

To redirect from an old to a new record, preview the old record and select **Redirect Document** from the Info portion of the content data section:



This will bring up a Find Alias Target page. Enter text and/or other attributes to locate the newer content record, select the record from the returned list, and select **Redirect to selected record**.



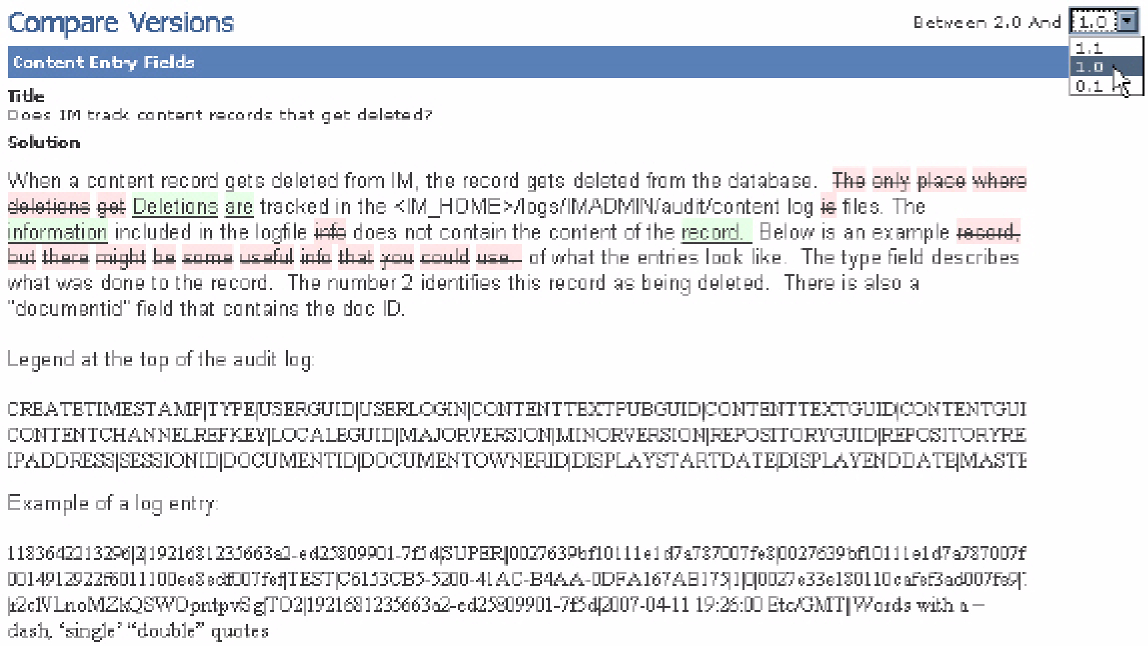
The redirected-to content record then appears in the content data section of the preview page:

Comparing Record Versions

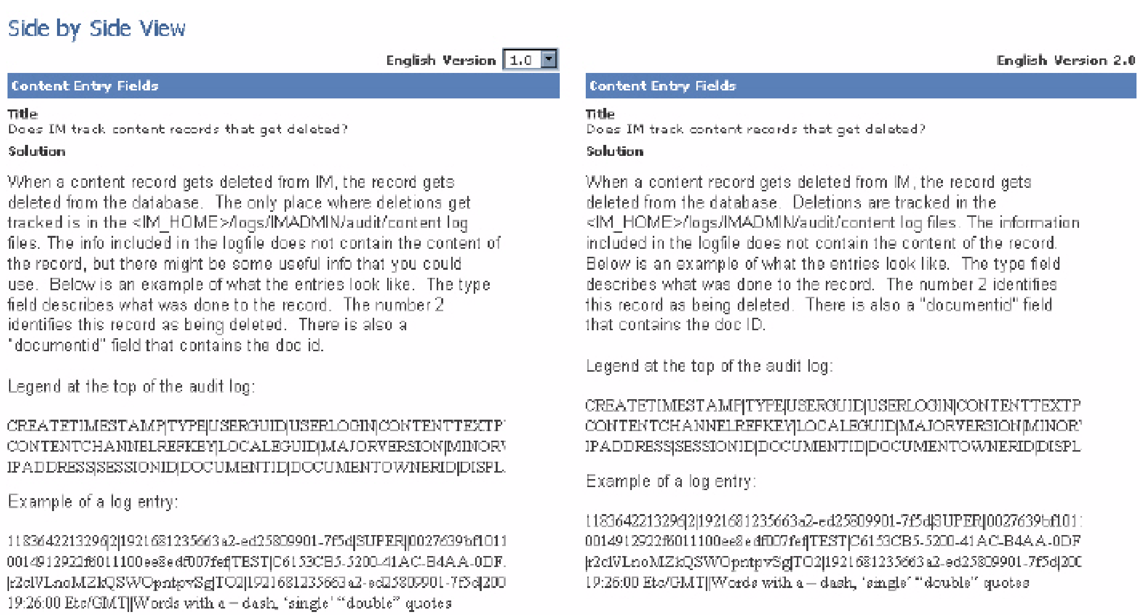
Each time a record is edited or published, a new version of the record is created. The record version number is incremented by a tenth (or dot value) each time it is edited. Each time the record is published, it is incremented by one.

You can compare versions of a record by selecting **Compare Versions** in the Info portion of the content data section of the previous page:

The latest version of the record is displayed in the Compare Versions page. In the upper right hand corner of the page, select the an earlier version of the record to compare. Text that was added since the previous version is shown underlined in green and text that was deleted is shown with a strike through in red:

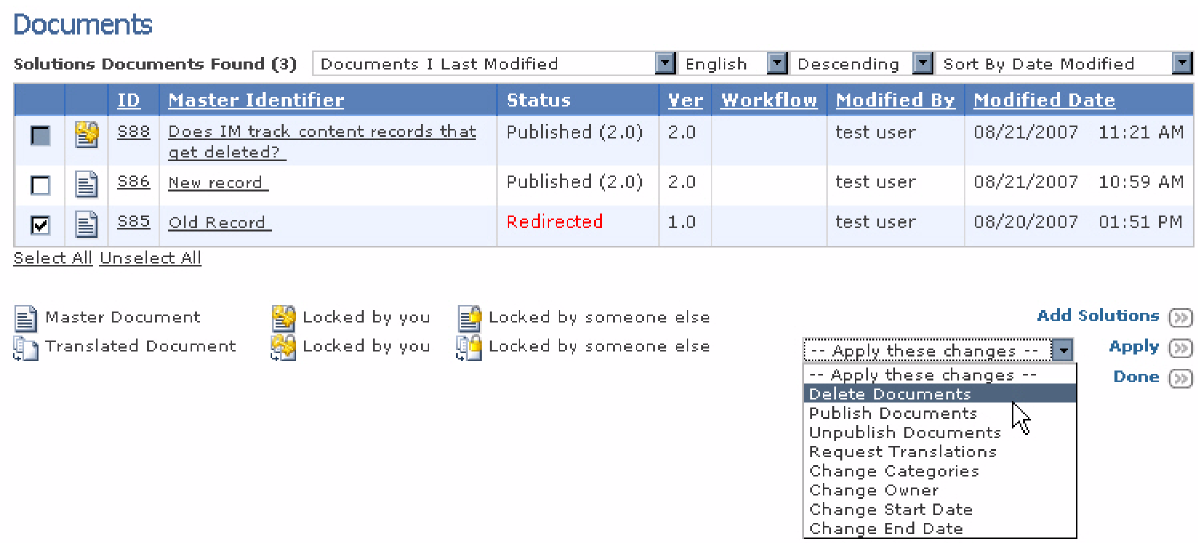


You can select **Side by Side View** to view the versions side-by-side:



Deleting Content from the Information Manager

You can delete content records from the Information Manager by generating a list of records, selecting the record or records to be deleted, and then selecting **Delete Documents** from the pull down menu in the lower right hand section of the page.



IMPORTANT: If a record has external resources such as images or other binary files associated with it, deleting the content record will also remove the external resources from the server.

NOTE: The Delete option is not intended for managing content publication. You can remove content from publishing using the publishing dates in the channel definition. The delete option is not intended for managing content publication.

When a content record gets deleted from Information Manager, the record gets deleted from the database. Deletions are tracked in the <IM_HOME>/logs/IMADMIN/audit/ content log files. The information included in the logfile does not contain the content of the record. Below is an example of what the entries look like. The type field describes what was done to the record. The number 2 identifies this record as being deleted. There is also a "documentid" field that contains the doc ID.

Legend at the top of the audit log:

CREATETIMESTAMP|TYPE|USERGUID|USERLOGIN|CONTENTTEXTPUBGUID|CONTENTT
EXTGUID|CONTENTGUID|CONTENTCHANNELGUID|CONTENTCHANNELREFKEY|LOCALE
GUID|MAJORVERSION|MINORVERSION|REPOSITORYGUID|REPOSITORYREFKEY|WORK
FLOWSTEPGUID|
IPADDRESS|SESSIONID|DOCUMENTID|DOCUMENTOWNERID|DISPLAYSTARTDATE|DISP
LAYENDDATE|MASTERIDENTIFIER

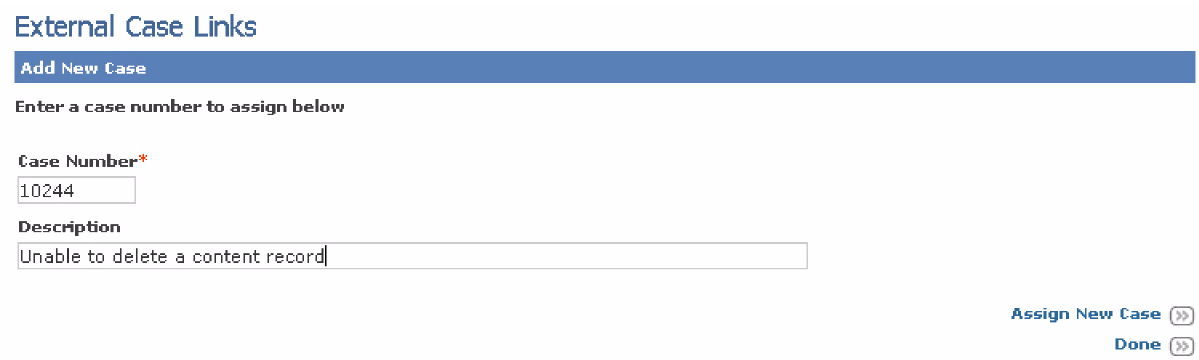
Example of a log entry:

1183642213296|2|1921681235663a2-ed25809901-
7f5d|SUPER||0027639bf10111e1d7a787007fe8|0027639bf10111e1d7a787007fe9|
0014912922f6011100ee8edf007fef|TEST|C6153CB5-5200-41AC-B4AA-
0DFA167AB175|1|0|0027e33e180110cafef3ad007fe9|TEST73||127.0.0.1
|r2clVLnoMZkQSWOpntpvSg|TO2|1921681235663a2-ed25809901-7f5d|2007-04-11 19:26:00
Etc/GMT||Words with a � dash, single � double � quotes

Linking Cases to Content Records

You can associate a record with specific cases in an external bug tracking or CRM system. To associate cases with a record, select **Manage Case Links** from the Feedback portion of the data content section of the preview page:

An External Case Links page is displayed, where you can add a case number and description:



When you are finished linking cases to the record, select **Done**. The cases are then displayed in the Feedback portion of the data content section of the preview page:

Recommending Content

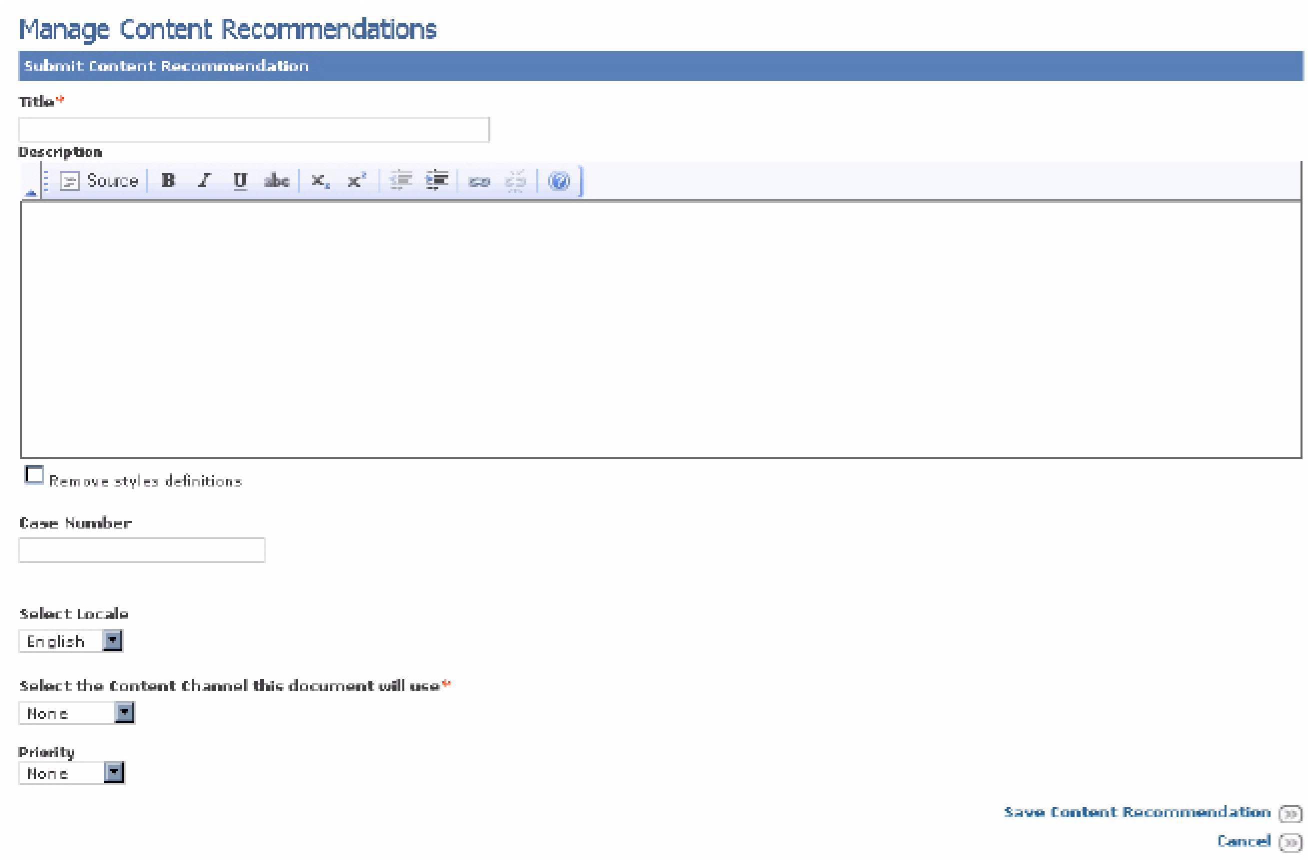
Information Manager allows users to recommend what content should be added in the future. To recommend that content be added to the application, select **Add Recommendation** from the record preview page:

Alternatively, you can select **Feedback** from the navigation area:

The Management Console displays the Feedback Management page.

- Select the **Add** option under Recommendations:

The Management Console displays the Manage Content Recommendations page:



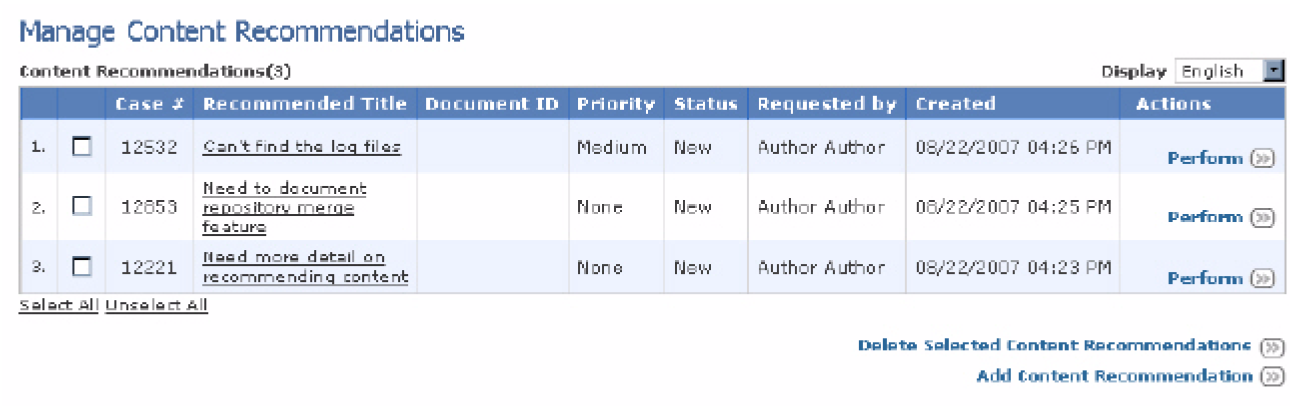
- Specify the following parameters:

Title	Specify a title for the recommendation.
Description	Enter any descriptive information to assist the content author in providing the appropriate content.
Case Number	Specify an incident or case identifier if applicable.
Select Content Channel	Select the relevant content channel for the new content, if applicable. The Management Console will display the available content categories for the selected channel.
Available Categories	Select the categories that this content should be assigned to.
Priority	Specify an optional priority (Low, Medium, or High) for this recommendation.

Listing Recommended Content

To view the list of recommendations, select **List**:

The list of recommendations is displayed:


Manage Content Recommendations

Content Recommendations(3)

Display English

		Case #	Recommended Title	Document ID	Priority	Status	Requested by	Created	Actions
1.	☐	12532	Can't find the log files		Medium	New	Author Author	08/22/2007 04:26 PM	Perform
2.	☐	12853	Need to document repository merge feature		None	New	Author Author	08/22/2007 04:25 PM	Perform
3.	☐	12221	Need more detail on recommending content		None	New	Author Author	08/22/2007 04:23 PM	Perform

Select All Unselect All

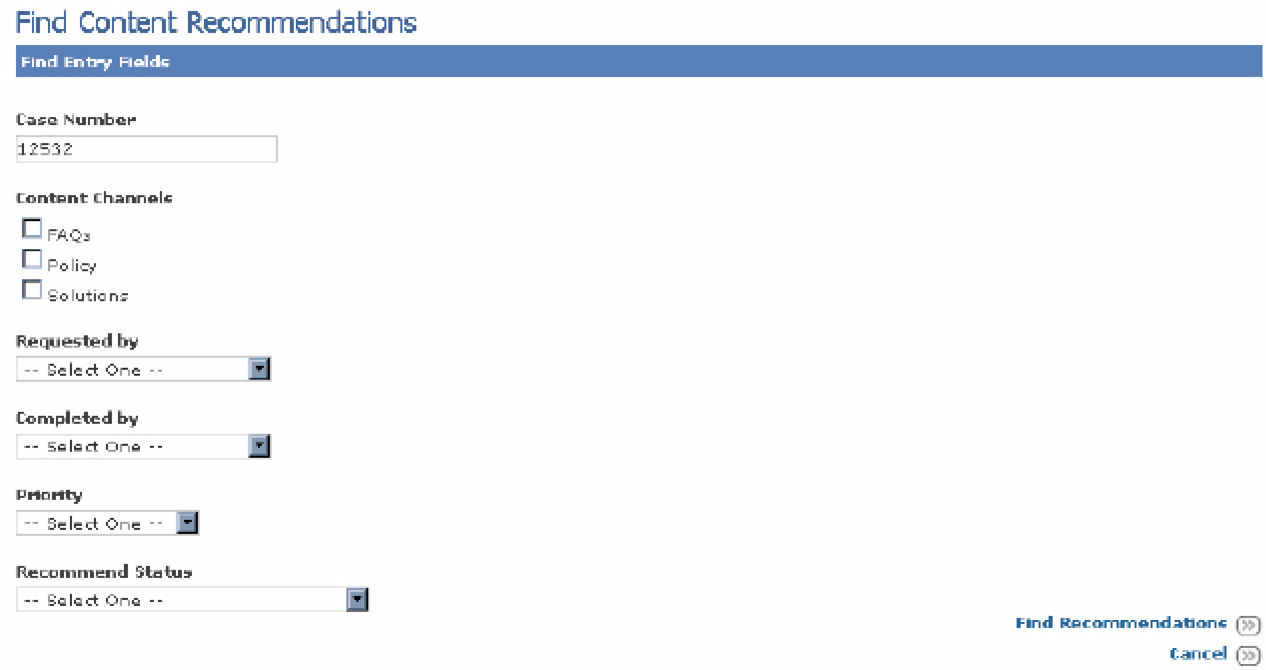
Delete Selected Content Recommendations

Add Content Recommendation

Finding Recommended Content

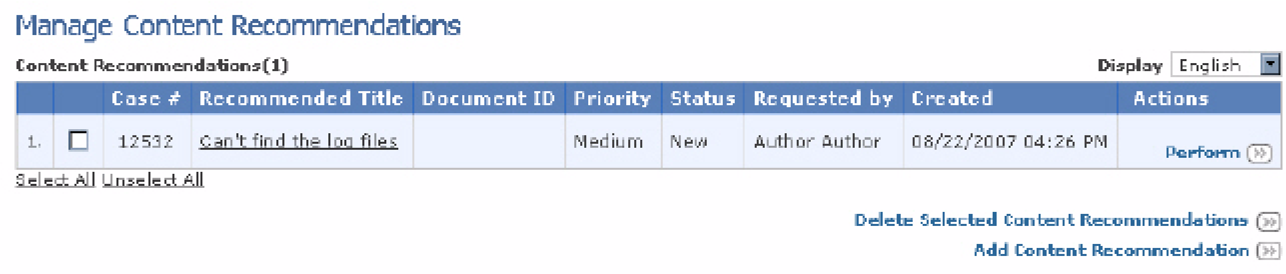
You can search for recommendations by selecting **Find** under Recommendations:

This displays the Find Content Recommendations page:



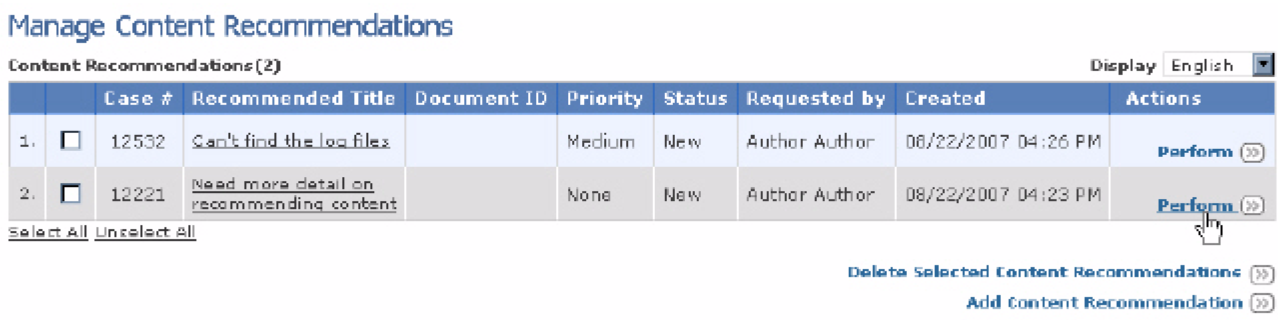
Case Number	Locate the recommendations associated with a specific incident or case identifier.
Content Channels	Locate the recommendations associated with a specific content channel.
Requested by	Locate the recommendations created by a specific user.
Completed by	Locate the recommendations completed by a specific user. A completed recommendation is one from which a new record is created. See *Completing a Recommendation* on page 64 for details.
Priority	Select to specify the priority for the recommendation: none, low, medium, or high.
Recommended Status	Select to describe the status of the recommendation. These include New, various forms of Rejected, Content Created and Content Modified.

The records matching the Find are displayed in the list:

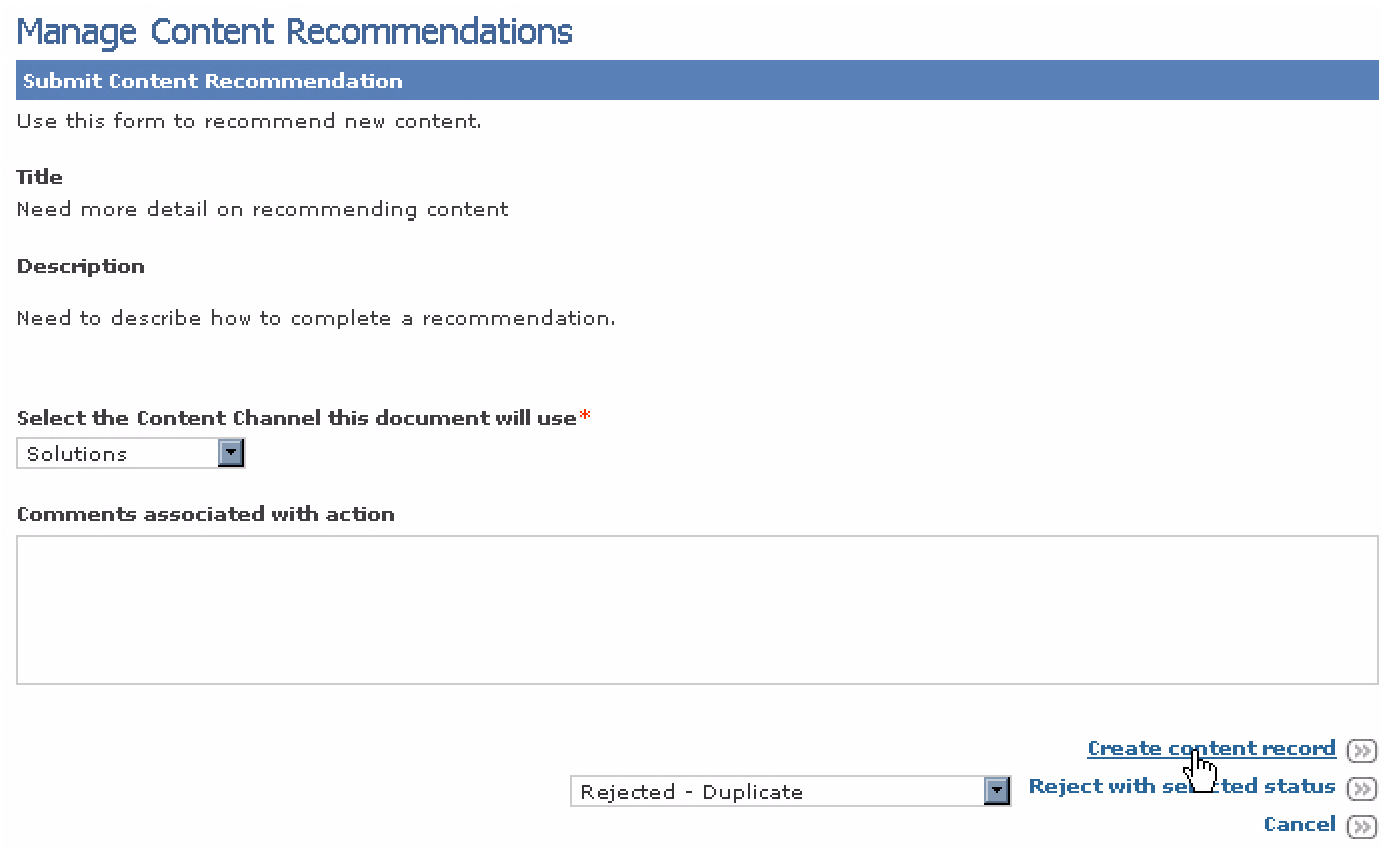


Completing a Recommendation

To create a record in response to a recommendation, list the recommendation and select **Perform**:



The recommendation is displayed. Select the channel in which to create the new record and add any comments to the recommendation, then select **Create content record**:



This will bring up the Add Content page, as described in *Adding a New Content Record* on page 30. Completed recommendations are removed from the list of recommendations, but can be retrieved by doing a **Find** with a **Completed by** that specifies the user who completed the recommendation, as described in *Finding Recommended Content* on page 62.

Chapter 3 Working with Tasks

You can define, generate, and manage tasks and task notification for users of your application based on various content management events using the Information Manager task management facility.

The Information Manager task management facility automatically generates tasks based on configured workflow processes and content lifecycle events such as content review dates. You can also define and configure batch jobs to generate tasks based on content rating levels. See *Action and Notification Tasks* on page 68 for a complete list of tasks.

The Information Manager notifies users of tasks based on the user roles, privileges, and notification configuration defined for your application.

Administrators and users can access tasks based on their user profiles and privileges using the Management Console Inbox, as described in *Listing INBOX Tasks* on page 70.

You implement Information Manager task management by:

- Configuring workflow processes as described in *Chapter 7, Workflow Processes* in the *Information Manager Administration Guide*.
- Configuring task notification for users, as described in *Specifying Management Console User Properties* in the *Information Manager Administration Guide*.

NOTE: You can also implement task generation and notification based on the JSP tag library, and external application processes via a Java based API.

You can report on task activity, such as average time to complete, number of open tasks, and task aging, using the Information Manager Analytics application, as described in *Using InQuira Analytics*.

Action and Notification Tasks

Information Manager defines the following types of tasks:

- Action tasks
- Notification tasks

Action tasks are available to be assigned to and performed by end-users. Information Manager notifies users about action tasks on the basis of the workflow process steps that are specified in their assigned security roles. For example:

- Information Manager generates a task when a content record in the Release Notes channel enters a workflow step called Release Note Approval
- Users having security roles that include the Release Note Approval privilege will see the task displayed in the Inbox

Action Tasks	Description
Workflow	These tasks are created when content records progress through a defined workflow process prior to publication. See *Chapter 7, Workflow Processes* in the *Information Manager Administration Guide* for more information.
Translation	These tasks are created when an authorized user or process determines that a content record should be translated. Information Manager requires a separate request for each locale, and generates a task for each request.
Content Review	These tasks are created when an authorized user or process determines that a content record should be reviewed. The review process is not tied to a workflow process.
Recommendation	These tasks are created when an authorized user or recommendation form requests a new document in the channel.

Survey Answer	These tasks are created when a survey response record is created within a channel. An email is sent to users who are authorized to see the results of a form and have expressed an interest in their user profile. See *Chapter 8, Feedback and Collaboration Features* in the *Information Manager Administration Guide* for more information about surveys and responses.

Notification tasks are the results of Information Manager processes that the user is authorized to receive information about. Information Manager typically notifies content owners for content-related notification tasks, such as content expiration; other notification tasks, such as data import completion, notify a specified email address.

Notification	Description
Expiring Content	Notifies content owners when content is due to expire based on a specified date or time period. Authorized users can specify content expiration as a default time period within the channel definition or on an individual record basis.
Workflow Progress	Notifies content owners of content progress within the workflow.
Delinquent Workflow	Notifies content owners when content is in a workflow step longer than the specified queue time.
Rating Analysis	Notifies content owners of content that exceeds or falls below a rating analysis batch job threshold. See *Scheduling Batch Jobs* in the *Information Manager Administration Guide* for more information.
Publish Notification	Notifies content owners of content that has been published.
Lost Password	Emails user password when requested from the IM login page.
Inactive Account	Notifies the administrator when a user's account is set to inactive after too many failed login attempts.
Content Subscription	Notifies content subscribers of updates to content records.
Forum Subscription	Notifies forum subscribers of updates to forum topics.
Forum Moderation	Notifies Discussion Forums moderators when abuse is reported, or when other filters identify issues with forum content.

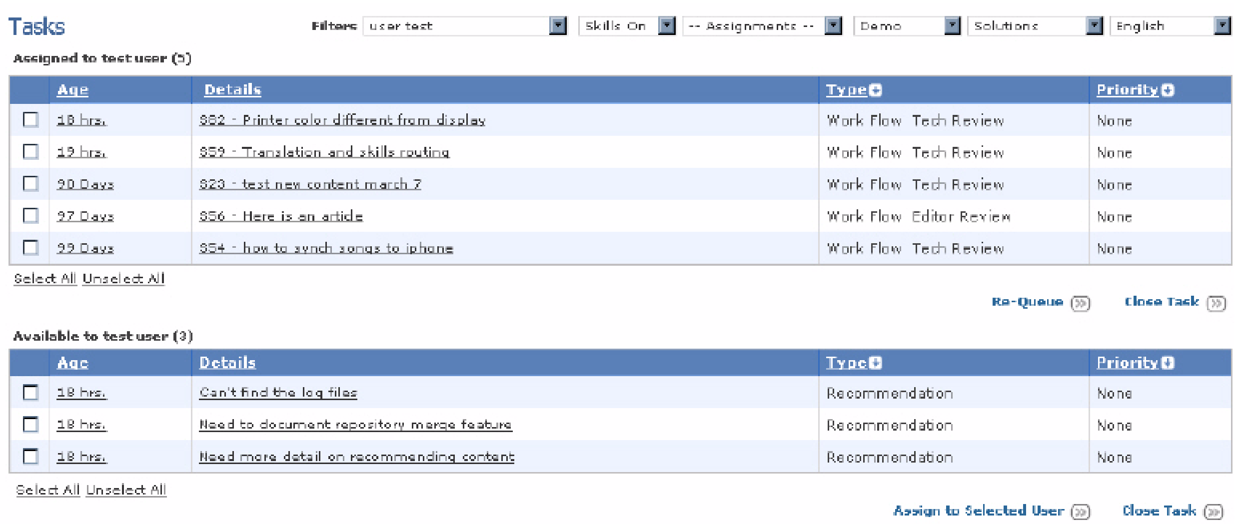
Listing INBOX Tasks

You can manage the tasks that are available and assigned to you using the Management Console Inbox.

To view your available and assigned tasks:

- Select **INBOX** from the navigation area:

The Task page displays your current task list:



Filtering the Task List

You can use the Filters at the top of the INBOX page to filter the task list.

The available filters are:

User Select to view the tasks assigned to other users.

Skills Select **Skills On** to list only the tasks associated with the records that have the same categories and the user categories. It is considered a match if a user or record is set with a subcategory and the other is set with a main category. See *Chapter 4, Content Categories* in the *Information Manager Administration Guide* for more information on Information Manager categories.

Select **Skills Off** to ignore category matches when listing the tasks.

Assignments Select **Assigned** to list only the tasks assigned to the specified user. Select **Unassigned** to list only the tasks available to the specified user.

Views Select a view to list only the tasks associated with the records in that view.

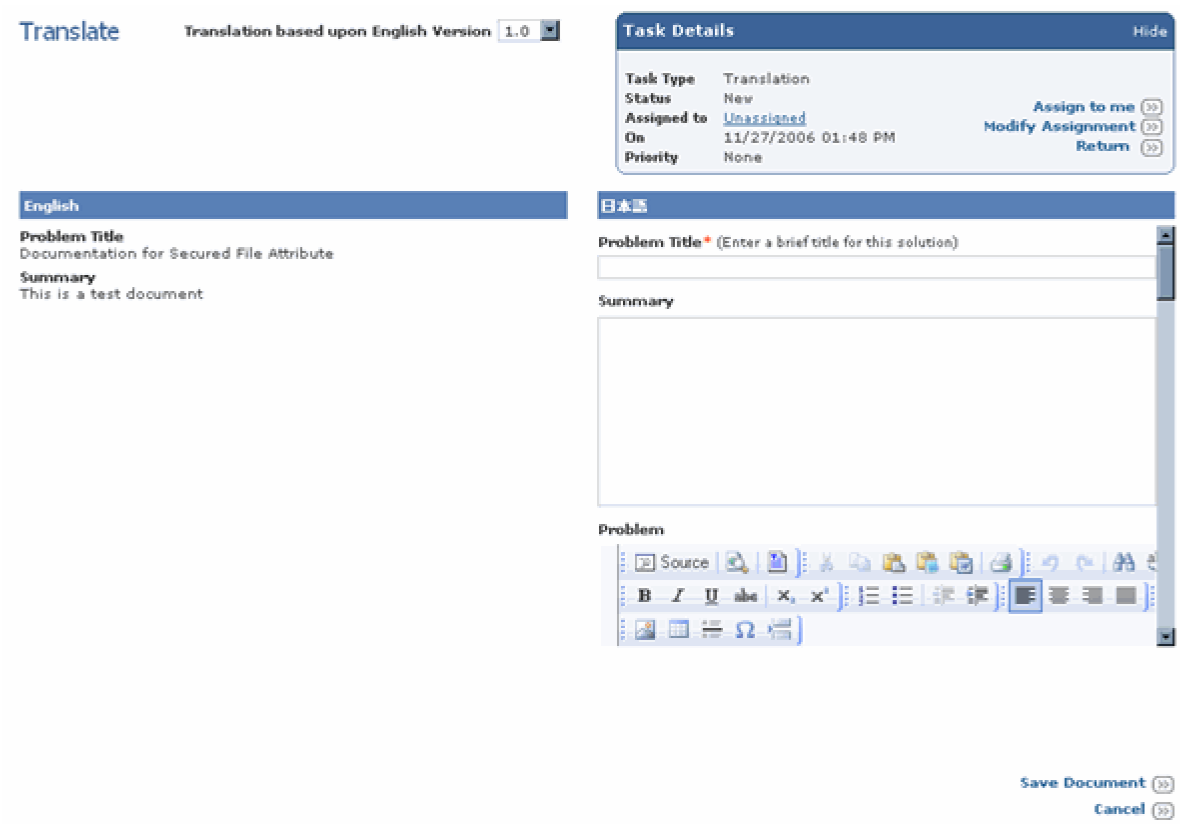
Channels Select a channel to list only the tasks associated with the records in that channel.

Locales Select a locale to list only the tasks associated with the records for that locale.

Viewing Task Details

You can view details about a task by selecting the task item in the Details column of the Inbox:

The Management Console displays task details in the appropriate page for the selected task type. A Translation page is shown in the example below:



The details page (the Translation page for this example) displays details based on the type of task that you select. Users can use the **Assign to me** option to assign available tasks to themselves. Users having the required privilege can also use the **Modify Assignment** option to assign the currently displayed task to another user. See *Assigning Tasks to Users* on page 73 for more information.

Assigning Tasks to Users

Authorized users can assign available tasks to other users from the Inbox's Tasks page. You can assign multiple tasks to a selected user from the Task page as described in *Assigning Multiple Tasks to a User* on page 74.

To assign a task to yourself:

- Select the task in the Details column from the list of available tasks (tasks not assigned to you)

The Management Console displays the appropriate page for the selected task type.

- Select **Assign to me** in the Task Details portlet

To un-assign a task assigned to yourself:

- Select the tasks to close using the tasks' checkboxes in the list of tasks assigned to you
- Select **Re-Queue**

To assign a task to someone else:

- Select the task in the Details column

The Management Console displays the appropriate page for the selected task type.

- Select **Modify Assignment** in the Task Details portlet

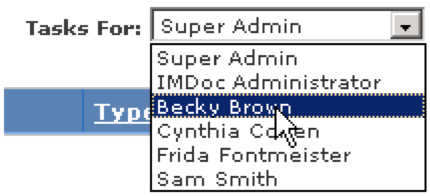
The Management Console displays the Task Assignment page for the selected task type.

- Select the user to assign the task to from the **User** dropdown list
- Select the task priority from the **Priority** dropdown list
- Select **Assign Tasks**

Assigning Multiple Tasks to a User

You can assign multiple tasks to a user from the Tasks page.

- Select the desired user in the Tasks for field:



- Select the tasks to assign in the Available Tasks list using the checkboxes
- Select **Assign to Selected User**:

The Management Console assigns the selected tasks to the selected user.

Performing Tasks

You can perform tasks that are assigned to you, or for which you are eligible by selecting the task in the Inbox area.

NOTE: If you perform an action that satisfies a task from another area of the Management Console, for example by locating, selecting, and editing a content record from a search results list, Information Manager will update the task manager just as if you had performed the task by selecting it from the Inbox.

When you select a task, the Management Console displays information about the task and a link to perform the task. When you select a link to perform a task, the Management Console displays the appropriate functional page. The action of selecting a link will activate the appropriate Task Handler designed to manage the select task.

To perform a task:

- Select the task in the Age column from the list of assigned tasks (tasks assigned to you)

The Management Console displays the Task History page for the selected task.

- Select **Perform**
- Complete the task as appropriate for the task type

The Management Console automatically closes performed tasks. Closed tasks remain in the task list until removed by a scheduled process.

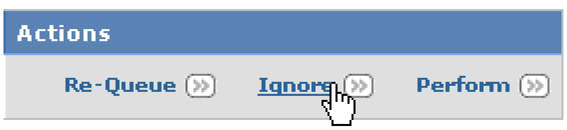
The Management Console closes the task. Closed tasks will remain in the task list, but can be removed by scheduling a Delete Closed Tasks batch process, as described in *Deleting Closed Tasks* in the *Information Manager Administration Guide*.

Ignoring Tasks

Authorized users can close an assigned task without performing it using the Ignore option on the Tasks page.

To ignore a task:

- Select **Ignore** in the Actions column for the selected task:



The Management Console changes the status of the task as described in *Listing INBOX Tasks*. Ignored tasks will remain in the task list, but can be removed by scheduling a Delete Closed and Ignored Tasks batch process as described in *Deleting Closed Tasks* in the *Information Manager Administration Guide*.

NOTE: You can use the **Restore** option in the Actions column to change the status of an ignored task back to Open: