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Portal Applications User's Guide

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About This Guide

This guide provides an overview of FatWire's two portal applications—the Content Server portal interface and Spark. This guide is intended to help you use the portal interface efficiently and effortlessly in the performance of your content management tasks, without requiring technical proficiency. This guide shows you how to create, edit, approve content for delivery to your portal, how to collaborate in workflow when necessary, and how to manage content on your own.

Who Should Use This Guide

This guide was written especially for content providers—anyone who creates, reviews, and approves content from either Spark or the CS portal interface. Typically, content providers are specialists in fields such as corporate communications, finance, human resources, sales, and marketing. The content providers' expertise is rooted in the content, not in the software used to manage it. Technical proficiency in the portal environment is not a requirement.

This guide is also helpful to individuals who support content providers, perform their functions, or simply need to understand the basic concepts of the portal interface. For example, this guide is helpful to the Spark administrator, who supports content providers by developing and customizing the installation to meet their needs.

How This Guide Is Organized

We recommend that you read chapters 1and 2 before proceeding with the rest of this guide. These chapters introduce you to the portal interface basics. Having a preliminary understanding of the basics ensures a smoother learning experience.

We also recommend that Content Server users read the *Content Server User's Guide* for a detailed overview of Content Server and its constructs (assets, workflow, publishing, revision tracking, and so on).

This guide contains the following chapters:

- Chapter 1, "Portal Applications Overview," provides an overview and a comparison of FatWire's portal applications—the Content Server portal interface and Spark. This chapter also explains the basics of the portal interface: its content management system; frequently used terms (for example, "assets" and "asset types"); how content is entered into the portal interface, stored to the database, and delivered to the portal; how your permissions to content are determined; what dependencies mean and how they affect content management operations.
- Chapter 2, "Getting Started with the Portal Interface," shows you how to log in to your own installation and the sample portal. It also describes your workspace—the portlets that you will be using in the portal interface to enter and manage content, and the content management tools that you will find within the portlets themselves.
- Chapter 3, "Creating and Editing Structured Content Assets," shows you how to create and edit structured content—content for which you are prompted.
- Chapter 4, "Working with 'My Documents'," introduces you to the "My Documents" portlet.
- Chapter 5, "Creating and Editing Document Assets and Folders," shows you how to create file-based assets.
- Chapter 6, "Creating New Assets by Copying," shows you how to quickly create assets from existing assets.
- Chapter 7, "Searching for Assets," shows you how to execute simple searches and the more granular advanced searches.
- Chapter 8, "Logging Assets," shows you how to create a list of "favorite," frequently used assets.
- Chapter 9, "Collaborating in Workflow," shows you how to participate in the creation, editing, and review of assets undergoing workflow.
- Chapter 10, "Revision Tracking," shows you how to track asset versions, roll back (restore) assets to older versions (if rollback is enabled), and check assets in and out of Spark or Content Server's database in order to write-protect them or unlock their write protection.
- Chapter 11, "Publishing," describes how to perform publishing tasks in the Content Server portal interface.

At the end of the guide is an index of procedures to help you quickly navigate to content management steps.

What's New in This Guide

This guide is new for this release of Spark and Content Server. It combines the information and procedures that were previously available in the *Spark User's Guide* and the portal interface section of the *Content Server User's Guide*. As you will learn when you read Chapter 1, "Portal Applications Overview," Spark and the CS portal interface share the same interface design and structure, but differ in the scope of the functionality and the array of options that they offer. Therefore, some of the information in this guide does not apply strictly to both applications. This guide indicates when functionality, options or application behavior is specific to either Content Server or Spark. Also, if a procedure is written specifically for Spark or Content Server, the application name is included in the procedure heading.

Related Publications

The FatWire library includes publications written for Content Server and Spark developers, administrators, and users. The publications are provided as product manuals with your Content Server or Spark installation. They are also posted on the Web at the following URLs:

- Content Server: `http://e-docs.fatwire.com/CS`
- Spark: `http://e-docs.fatwire.com/Spark`

The Content Server documentation website is password-protected; you will need to obtain a password from FatWire Technical Support. For Technical Support contact information, see the following website:

`http://www.fatwire.com/Support/contact_info.html`

Other publications, such as white papers, provide information about Content Server and Spark's feature sets and their business applications. To obtain these publications, contact `sales@fatwire.com`.

Chapter 1

Portal Applications Overview

This chapter provides an overview of FatWire's portal applications: the Content Server portal interface and Spark.

This chapter contains the following sections:

- Introduction to Portals
- Introduction to the Portal Applications
- Basic Content Management Concepts
- Permissions to Assets
- Dependencies
- Portal Interface Content Management Operations
- Spark vs. Content Server Functionality

Introduction to Portals

A portal is the content provider's end product. Portal content is specific to each organization and depends on the nature of the organization. A news agency might produce articles, photos, and video clips. A sales company might offer product descriptions, special offers, and coupons. A human resources department might manage job postings and personnel policies.

Regardless of your business, the portal presents your work to the end audience as discrete panels called "display portlets," such as the ones shown in Figure 1. Each display portlet has its own business theme. In Figure 1, display portlet 1 is dedicated to ads, portlet 2 to documents, and portlet 3 to jobs.

Figure 1: Sample portal

Note

In your portal, display portlets are not numbered. Numbering in this figure is for reference.

Each display portlet presents the content that you and your collaborators have entered into Content Server or Spark through its portal interface.

Your end goal for entering and managing content is to have it delivered to your portal so that your visitors can read and examine it. This guide shows you how to use the portal interface to help you accomplish your goal.

Introduction to the Portal Applications

FatWire provides two portal applications–the Content Server portal interface and Spark. These applications are specially designed for the business user, to help you function efficiently as a content provider.

Both of the portal applications provide an easy-to-use interface, which displays your tasks and objects within portlets in a workspace area. You do not need to know HTML or any other markup language to use this interface, and you are not responsible for formatting the content you provide. Therefore, your attention remains focused on your area of expertise—the content itself.

Both portal applications provide tools that facilitate the progression of your content from creation to publication. Using the CS portal interface or Spark, you can participate in workflow, the process by which content moves from person to person and ultimately approved for delivery to the portal. You can also use the revision tracking tools in the portal interface to audit the changes in content.

Content Server

The Content Server (CS) application family is a high-performance, large-scale content management and delivery system for website and portal management.

Content Server has two main user interfaces: the standard interface and the portal interface. Both interfaces give you the same functionality, but they present it differently.

This guide contains only the instructions for accomplishing specific tasks from the Content Server portal interface. The Content Server constructs (such as assets, workflow, publishing, and revision tracking), on which the instructions are based are given in the *Content Server User's Guide*, where instructions on using the Content Server standard interface are also provided.

Spark

Like Content Server, Spark offers you an easy-to-use portal interface that helps you create and manage content efficiently. However, Spark is intended for small to mid-size portal initiatives, while Content Server supports enterprise-wide implementations. See "Spark vs. Content Server Functionality" on page 24 for a comparison of Spark and Content Server functionality.

This guide provides procedures on how to use Spark to accomplish your tasks and explains the basic content management concepts on which the procedures are based.

From the Portal Interface to the Display Portal

In Spark and the CS portal interface, you use content-entry forms to create content in the form of electronic assets. A content-entry form has a well-defined relationship to the database where it is stored and to the portal where it is displayed. The relationship is illustrated in Figures 2 and 3, and explained below.

When you populate a content-entry form—for example, Spark contact in Figure 2— and save the content, the portal application stores the content in its content management database (step 1 in Figure 2). When you approve the asset for publication, an authorized user publishes the asset by copying the asset to the delivery system, where a duplicate database accepts the asset (step 2 in Figure 2). Finally, when the asset is ready for delivery

to the portal, its content is drawn from the database by JSPs, formatted by the JSPs, laid out by the JSPs (step 3 in Figure 2) and delivered to the portal by JSPs (step 4 in Figure 3).

In this example, the content is delivered to the “Spark Jobs” portlet, where it is displayed as a single line below the job ad (Figure 3). The job ad itself was created from the entries in the content-entry form that was designed specifically for job ads.

The relationship of a content-entry form to the display portal is a straightforward one: A content-entry form accepts raw content for storage in the database; at display time, the portal displays the content, but in client-ready format.

Content-entry forms offer their users major advantages:

- Users don't need to learn the specifics of the portal application’s database.

  A content-entry form can be thought of as a window in to the portal application’s database. Content that you enter into a form is stored in the database. Content that you recall is read from the database and displayed in an editorial version of the content-entry form.

  Because a content-entry form is a standard interface to the variety of databases the portal applications support, it spares users from having to learn the specifics of any database in particular. If one database is replaced with another (for example, SQL Server is replaced with an Oracle database) the switch is transparent to users.

- Users don't need to know HTML or other markup languages.

  No content-entry form requires its users to format the content they enter or edit. Formatting is accomplished by JSPs, which are coded by developers to meet the portal designer's specifications. As a content provider, you remain strictly focused on the content you are providing and its quality.

- Guesswork is minimized.

  In content-entry forms, field names prompt users for certain kinds of information: a phone number, a job description, a file name, and so on. Users always know what kind of content is expected from them.

- Reusability and consistency are maximized.

  Each unit of content that you enter into a form can be reused as many times as necessary, in as many formats as necessary, in as many locations within the portal as necessary. Reusability ensures consistency across the portal by eliminating the need for re-creating information each time the information must be used.

Figure 2: Content in the content-entry form

Note: This figure is paired with the figure on the next page.
Display the pages side by side.

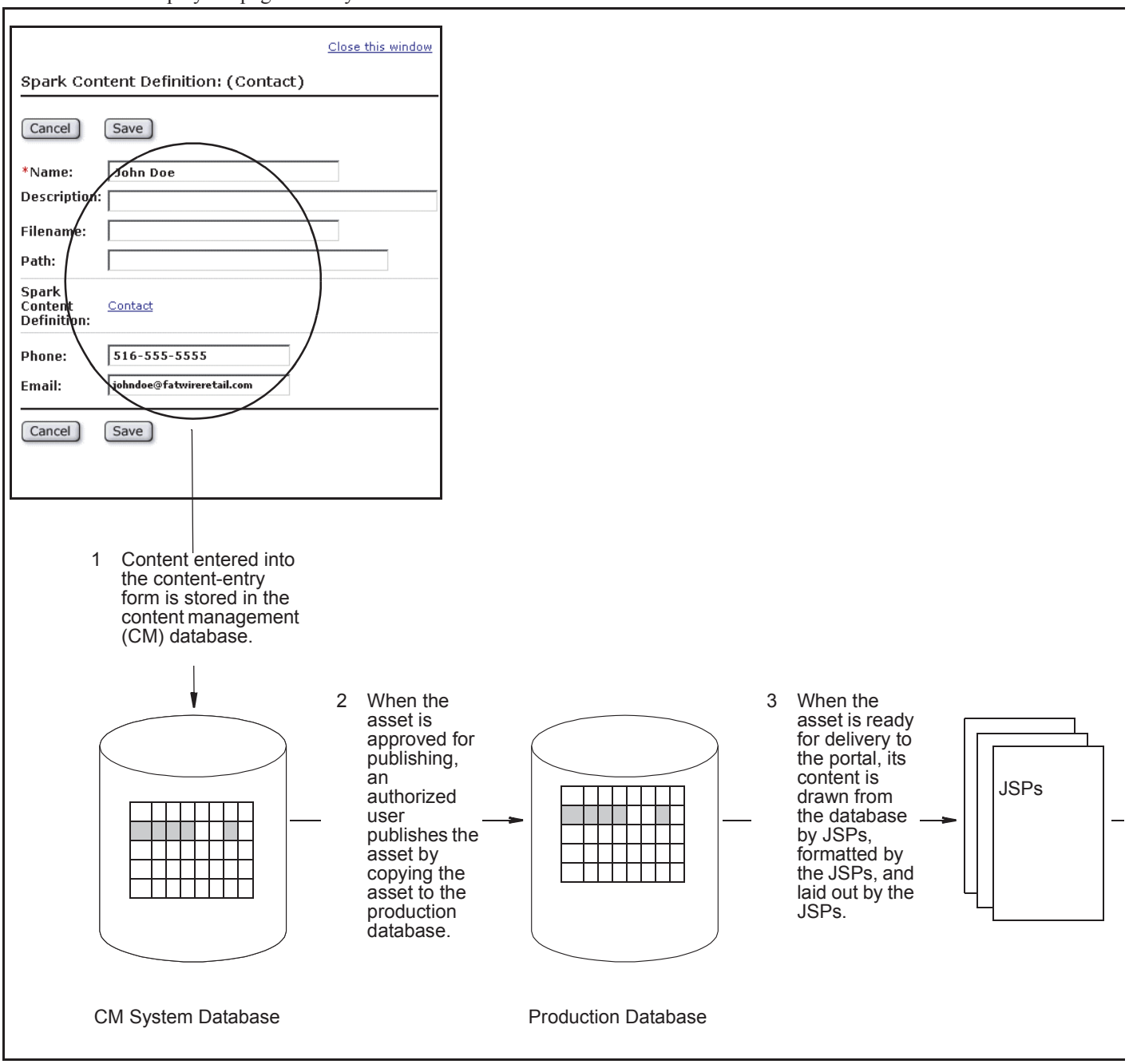
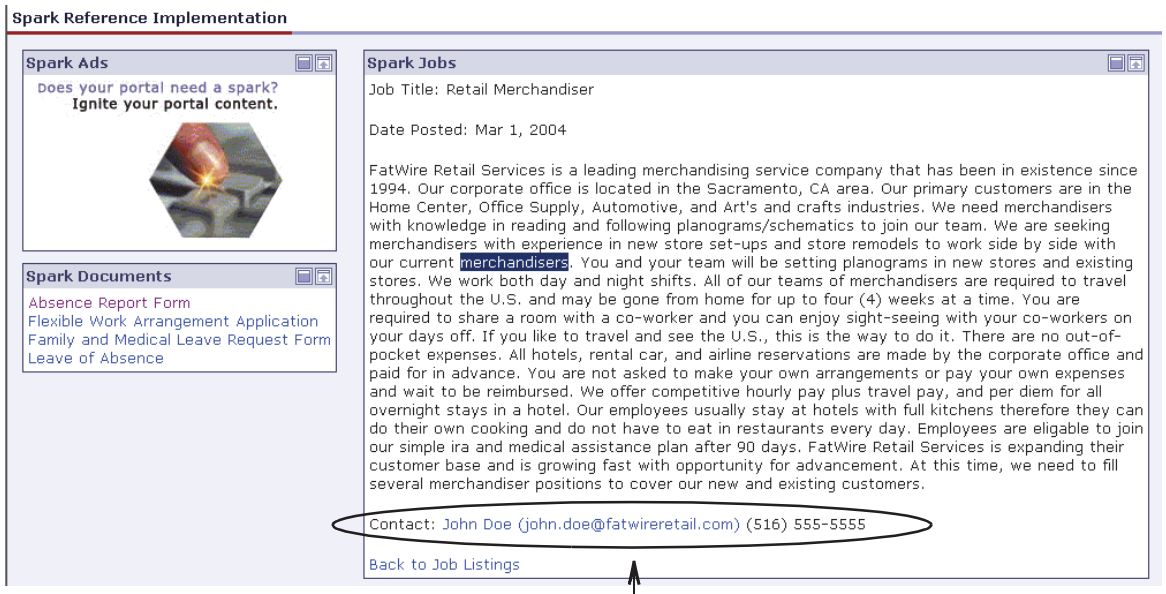


Figure 3: Display portal

Note: This figure is paired with the figure on the previous page.
Display the pages side by side.



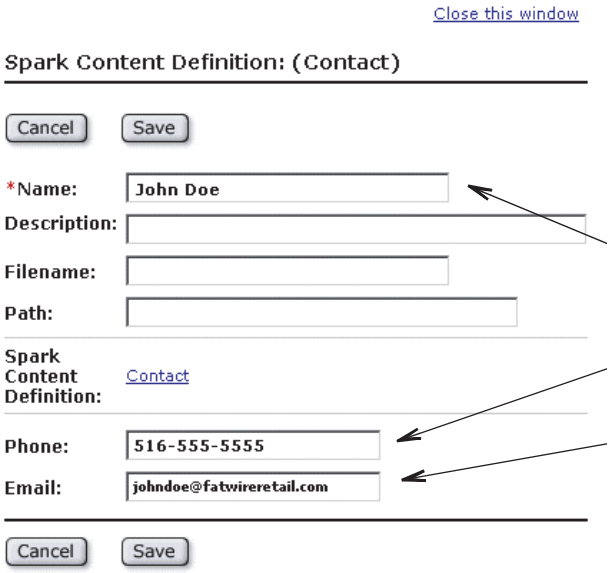
4 Formatted content is delivered by the JSPs to the portal.

Basic Content Management Concepts

This section explains how the portal applications define and treat content. It explains terms such as “assets,” and “asset types,” which are used throughout this guide.

Content: Assets and Asset Types

Portal content (like website content) is referred to as “assets” and “asset types.” Both assets and asset types are represented in content-entry forms, one of which is shown below.



An asset is an object that is created by a user populating the fields of a content-entry form, similar to the one at the left. In this example, the asset is a contact, defined by field values entered by the user:

a specific name
(John Doe in this example)

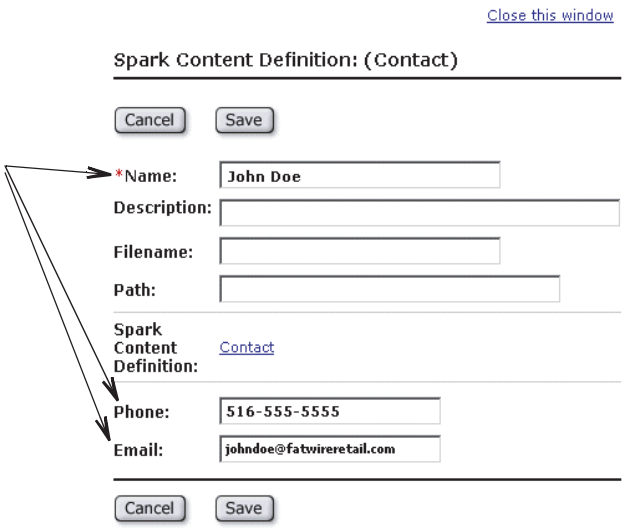
a specific phone number
(516 555-5555 in this example)

a specific e-mail address
(`johndoe@fatwireretail.com` in this example)

Field values define the asset. When saved, the asset is stored in the portal application’s database.

The asset can be edited, inspected, deleted, duplicated, placed into workflow, tracked through revision tracking, searched for, and delivered to the portal.

Like any asset, the asset in our example was created from an asset type, defined in the content-entry screen by the names of the fields (listed at the left of the screen): Name, Phone, Email. **Field names define the asset type.**



An asset type, then, is a specification—a set of field names that are created by the administrator (and the system) in order to define the nature of the asset type: a news article, a job ad, an HTML document, and, in our example, a contact.

Many kinds of asset types can be created. Each asset type has its own content-entry form, formatted as shown on this page, but with a unique set of fields. What's important to remember is that the asset types are created for content providers, who select the asset types they need to work with, and then create and edit assets of those types.

To create an asset, you would use the UI portlet "Create Content." To edit an asset, you would find the asset (for example, by using the "Search Content" portlet), click its **Edit** icon, and make changes to the asset's field values.

Note

To be technically accurate, the fields described in "Basic Content Management Concepts" on page 17 are ***attributes***. The distinction is important to administrators and developers, and does not affect the content provider's work or understanding of content management in the portal interface. For this reason, the terms "field" and "attribute" are used interchangeably throughout this guide (as, for example, in Chapter 7, "Searching for Assets").

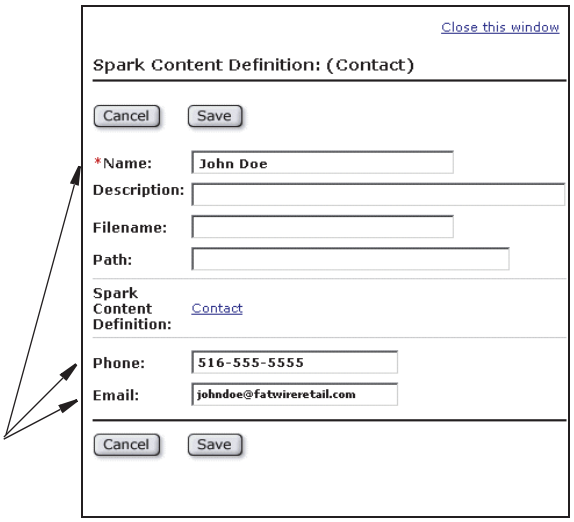
Structured Content Assets *vs.* Document Assets

Portal interface users work with two kinds of asset types: the **structured content asset type**, which prompts users for publishable content by means of fields where the content is to be entered; the **document asset type**, which prompts users for the name of a file containing the publishable content.

- **Structured content assets**: Structured content assets are instances of the structured content asset type. You create structured content assets by entering content directly into pre-configured content-entry forms. The forms impose content structuring by means of fields, which prompt you for specific information—for example, a part number, a publication date, an image, or text for a news article.

  The sample form at the right prompts you for a name, a phone number, and an e-mail address. Content that you enter into a form is stored directly in the portal application's database, as explained on page 13. Typically, the format and layout of the content are outside your control.

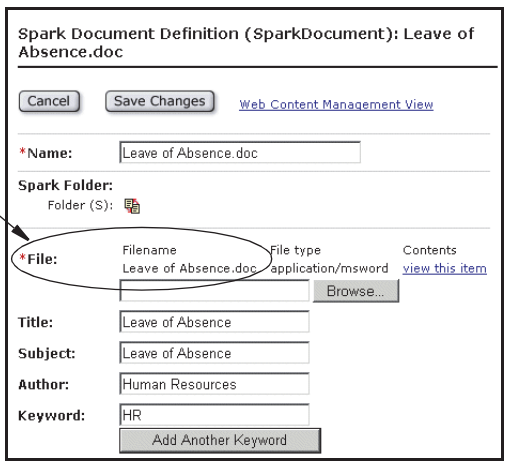
Structured Content Asset



- **Document assets**: Assets with file-based content are called document assets. Document assets are instances of the document asset type. You create document assets by entering content into a file of your choice (a `.doc` file in this example) and then attaching the file to the document asset. Working with document assets is called "document management."

  As part of document management, the portal interface supports the use of folders (which are also assets) to organize document assets. You can create folders and associate document assets with the folders. Each folder is the parent of its associated document asset.

Document Asset



Structured content is used in situations when uniformity and standards need to be enforced. File-based content, on the other hand, is used when a free-style approach to content is acceptable. File-based content gives you the freedom to compose content of your own choice, and to express it in your own style and format.

Structured content assets cannot be associated with files and therefore do not support document management.

In the portal interface, Content Management (CM) portlets allow you to manage your structured content assets as well as your document assets, while Document Management (DM) portlets allow you to manage only your document assets. Depending on the permissions granted to you by your administrator, you may have access to some or all of the portlets. See "Learning Your Workspace" on page 30 for more information about these portlets.

Note

Both the CS portal interface and Spark provide a virtual document management system. This document management system *simulates* a true file management system by supporting the familiar concept of folders and files, which helps content providers navigate through the portal interface more intuitively when dealing with document assets. Note that this virtual management system should not be equated with a true file management system, such as Windows Explorer.

The document management system is expressed in the portlet "My Documents," where the collection of document assets and folders is displayed. Chapter 4, "Working with 'My Documents'" provides more information about the "My Documents" portlet.

Additional Assets for CS Portal Interface Users

CS portal interface users can work with two additional kinds of structured content assets: **marketing assets** and **design assets**.

Marketing assets are supported if you are using Engage. Marketing assets help you create personalized and targeted web sites. Users with the necessary roles and permissions can work with the following marketing assets:

- **Segment assets** categorize web site visitors based on the visitor data that you gather about them.
- **Recommendation assets** determine which assets should be featured or "recommended" on a site page.
- **Promotion assets** define an offer of value (such as a discount) to web site visitors based on the products that the visitors are buying and the segments that the visitors qualify for.

Design assets provide the design structure for the web site. That is, site developers use them to create the look and feel of the online site and to organize the site's content. Typically, site developers are responsible for creating design assets. As a content provider, you use the design assets they create to format and organize your content.

The following list provides general descriptions of the design assets that you can use. The availability of the design assets and your access to them depends on your organization's Content Server implementation and the permissions granted to you by your administrator.

- **Query assets** store database queries that typically retrieve a list of assets based on selected parameters or criteria. You use query assets in page assets and collections.
- **Collection assets** store an ordered list of assets of one type. You "build" collections by running one or more queries, selecting items from the results, and then ranking and ordering the items that you selected. This ranked, ordered list is the collection asset.
- **Page assets** store references to other assets, organizing them according to the design that your site developers implement. You can associate collections, queries, articles, and so on with page assets.
- **Template assets** create the look and feel of the web site. You, as a content provider, assign template assets to format other assets, such as articles. Typically, the site developers provide instruction on how templates are to be assigned.
- **Link assets** store the URL to an external web site. You use a link asset to embed an external link within another asset.

The *Content Server User's Guide* describes design assets and marketing assets in detail.

Note

Like other structured content assets, design assets and marketing assets are accessed and managed from the Content Management portlets. For example, you would use the "Search Content" portlet to search for collection assets.

For more information about the Content Management portlets, see "Content Management (CM) Portlets" on page 30.

Permissions to Assets

Permissions are the rights to manage content: create, view, or edit assets; participate in workflow; and approve assets for publication. Permissions therefore determine which assets and asset types are displayed in the portlets in your workspace, and which content management tools are available to you to operate on the assets.

Your permissions are granted by your portal interface administrator and determined by workflows, when they are in effect.

- For example, whether you can create structured content assets is determined by whether the administrator has granted you permission to create structured content assets. Without permission, you cannot create structured content assets. Therefore, structured content asset types will not be displayed in your "Create Content" portlet. Similarly, if you were not granted permission to edit structured content assets, the **Edit** icon will not be displayed with the structured content assets.
- If workflow is assigned to an asset, your permissions to the asset are modulated during the workflow. For example, when you are not a participant of a workflow state (a progress point in a workflow that defines what task must be performed on the asset in that particular state), you cannot work with assets in that state.

Dependencies

Dependencies are an important consideration for the content provider, because they govern how assets can be managed—for example, whether assets can be deleted, and in which order they can be deleted.

Dependencies are relationships that exist among assets which have somehow been associated with each other. Some associations are inherent to the data model, others are created at the asset level by content providers. The associations can be made as follows:

- The administrator or developer can create assets types with common (shared) fields. When the corresponding assets are created, they share the field value(s). This type of association is defined in the data model, which the administrator or developer uses as a specification to create asset types with shared fields.
- The administrator or developer can create asset types that point to other asset types. For example, if asset type A needs information from asset type B, a field in asset type A can be made to point to a specific field in asset type B. When the corresponding assets are created, one field derives its value from another field in a different asset. This type of association is also defined in the data model.
- Content providers can associate document assets with other document assets, regardless of the data model. For example, you create dependencies by attaching document assets to folders, and folders to other folders.

Because the assets in a dependency share data, deleting the “root” asset (the source of data) would cause dependent assets to lose data. To prevent corruption of assets, direct deletion of the root asset is not allowed. The asset’s dependents must first be disassociated from the root asset. Only then can the root asset be deleted. Similar reasoning applies to other operations. For example, approving a dependent asset requires you to first approve the root asset.

When dependencies prevent you from executing an operation, the portal interface warns you of the dependencies and identifies the participating assets. You can then take appropriate actions to remove the associations that are causing the dependencies.

Portal Interface Content Management Operations

Table 1 summarizes the content management operations that you can perform on assets in the portal interface. When using the portal interface, keep in mind a general rule: If your workspace does not display the portlets, the content, or the content management tools described in this guide, it is because your permissions to these elements are limited. If you have questions about your access rights, see your Spark or Content Server administrator.

Table 1: Content management operations

CM Operation	See...
Create structured content assets (if you have permission)	Chapter 3
Edit structured content assets (if you have permission)	
Delete structured content assets (if you have permission)	
Create document assets (if you have permission)	Chapter 5
Edit document assets (if you have permission)	
Delete document assets (if you have permission)	
Keep a session history (a list of assets that you have created during the current session.)	Default for all users
Run search routines on structured content assets (if you have permissions to structured content assets)	Chapter 7
Run search routines on document assets (if you have permissions to document assets)	
Participate in workflows (if you are designated as a participant)	Chapter 9
Keep an assignments list (a list of assets that have been assigned to you as a result of workflow processes)	
Keep a checkout list (a list of assets that are checked out to you)	Chapter 10
Use revision tracking and version control	
Keep an active list (a list of favorite or frequently used assets)	Chapter 8
Approve assets for publication	Chapter 9 and Chapter 11
Publish assets (Content Server only)	Chapter 11

Spark vs. Content Server Functionality

Spark and the CS portal interface share the same interface design and structure, but differ in the scope of the functionality and the array of options that they offer.

Table 2: Spark vs. Content Server Functionality

Functionality	Spark	CS Portal Interface
Basic and flex assets	Spark supports only flex assets.	The CS portal interface supports both basic and flex assets. See the *Content Server User's Guide* to learn more about the differences between flex and basic assets.
Structured content asset types	Spark supports the creation of as many structured content asset types as necessary.	The CS portal interface supports the creation of as many structured content asset types as necessary.
Document asset types	Spark supports only one system-defined document asset type, and this asset type cannot be modified.	The CS portal interface supports the creation of as many document asset types as necessary.
Workflow processes	Spark supports only three workflow processes, all pre-defined; they cannot be modified: • A two-state workflow process called "Publish Without Review" • A three-state workflow process called "Publish With Review" • A two-state workflow process called "Publish Documents Without Review"	The CS portal interface supports all workflow processes, whether they are provided with sample sites or created by the CS administrator (workflows are created in the Content Server standard interface).
Workflow options	The following workflow options are not available in Spark: • Show the list of participants in a workflow process • Set participants in a workflow process • Set a process deadline • Delegate an assignment • Abstain from voting	The CS portal interface supports all workflow options.

Table 2: Spark vs. Content Server Functionality*(continued)*

Functionality	Spark	CS Portal Interface
Site selection	Spark supports only one site.	The CS portal interface supports multiple sites.
Publishing	Spark supports only dynamic publishing. Spark supports only one publishing destination, the delivery installation of Spark.	The CS portal interface supports both dynamic and static publishing. The CS portal interface supports multiple publishing destinations.
Third party search engines (such as Verity)	Spark does not support third-party search engines.	The CS portal interface supports the third-party search engine Verity.
Design asset types	Spark does not install or support the following design asset types: • Collections • Pages • Queries • Templates • Elements	The CS portal interface installs and allows access to all design asset types.
Additional interfaces	Spark does not support the following interfaces: • CS-Desktop • CS-DocLink • InSite Editor	The CS portal interface supports all of these interfaces.
Additional products	Spark does not support the following products: • Engage • Commerce Connector • Analytics Bridge	The CS portal interface supports all of these products.

Chapter 2

Getting Started with the Portal Interface

Your goals in using portal applications are to create, review, and manage content and, ultimately, approve the content for delivery to your portal for visitors to read and examine. The portal interface allows you to accomplish your goals by means of portlets that help you manage your content.

Both Spark and Content Server come with a sample site that provides a sample portal and underlying data for the times when you might want to learn about and experiment with your portal application without affecting your own installation.

This chapter shows you how to log in to the portal interface and set up your workspace. It describes your basic content management tools and the operations that you will perform on content. This chapter also shows you how to log in to the sample site.

This chapter contains the following sections:

- Before Logging In
- Logging In to the Portal Interface
- Learning Your Workspace
- Working with Assets
- Logging Out of the Portal Interface
- The Spark Sample Site

Before Logging In

If you are running your portal application (Content Server or Spark) for the first time, you must configure your browser to refresh pages as quickly as the portal application delivers new information to them. Once the browser is configured, you can log in to the portal interface and expect up-to-date displays.

Make sure you are using one of the browsers supported by your portal application. Contact your administrator for a list of supported browsers; then complete the corresponding steps from the options below.

To configure Internet Explorer

1. Click **Tools > Internet Options**.
2. From the "Internet Options" dialog box, click the **General** tab.
3. Advance to the "Temporary Internet files" section and click the **Settings** button.
4. In the "Settings" dialog box, select **Every visit to the page**.
5. Click **OK**. Your system has been properly configured.

To configure Netscape Communicator

1. Click **Edit > Preferences**.
2. On the left side of the "Preferences" dialog box, double-click **Advanced**.
3. From the directory tree, select **Cache**.
4. On the right side, select **Every time**.
5. Click **OK**. Your system has been properly configured.

Logging In to the Portal Interface

Logging in to your portal interface is a system-specific procedure in which you must complete at least the following steps:

Before logging in

1. Before logging in to the portal interface, do the following:
   a. Configure your browser as shown in "Before Logging In" on page 28.
   b. Consult with your administrator about the login procedure and obtain the following information:
      - The URL for the portal interface
      - Your user name
      - Your password
      - The login procedure

To log in to the portal interface

2. Open your browser.
3. Enter the URL for the portal interface.
4. Enter the user name and password provided by your administrator.
5. If you are using Spark, proceed to step 7.
6. If you are using the Content Server portal interface, click one of the tabs displayed in the interface to access the "Site Info" portlet (you will learn more about these tabs in the next section).

   Select a site to work on in the "Site Info" portlet. If you do not know what site to select, ask your administrator. After you select a site, Content Server displays your workspace.

> **Note**
>
> **Content Server portal interface users:** Depending on your installation, the "Site Info" portlet may display a list of the following sample sites: Hello Asset World, Burlington Financial, GE Lighting, CO, and Spark.
>
> In this guide, we are using the "Spark" sample site to illustrate the portal interface. **Spark Contact**, **Spark Document**, **Spark Folder**, **Spark Job**, and **Spark News Item** are all asset types specific to the "Spark" sample site.

7. You are now ready to begin using your workspace—a set of portlets through which you will contribute content to the portal, then manage and approve the content for publication.

Learning Your Workspace

Your workspace can display two types of content provider portlets: Content Management (CM) portlets and Document Management (DM) portlets. In most cases these two types of portlets are displayed in two tabs: one for CM portlets and one for DM portlets. (To switch between the tabs, simply click the tab that you want to display.)

Content Management portlets allow you to manage your structured content assets as well as your document assets, while Document Management portlets allow you to manage only your document assets. Depending on the permissions granted to you by your administrator, you may have access to some or all of the portlets. Each portlet has its own function.

Each portlet contains sizing icons (Table 4) for adjusting the portlet's dimensions to normal (native) size, minimized (collapsed), and maximized. The portlets can also be moved within the interface to new positions and different pages.

The following procedures will help you become familiar with the portlets and sizing tools in your workspace.

Content Management (CM) Portlets

Several CM portlets can be displayed on the portal interface. You may have access to some or all of these portlets, depending on the permissions granted to you by your administrator.

To learn about the CM portlets

1. Log in to the portal interface. If you need instructions, see "Logging In to the Portal Interface" on page 29.

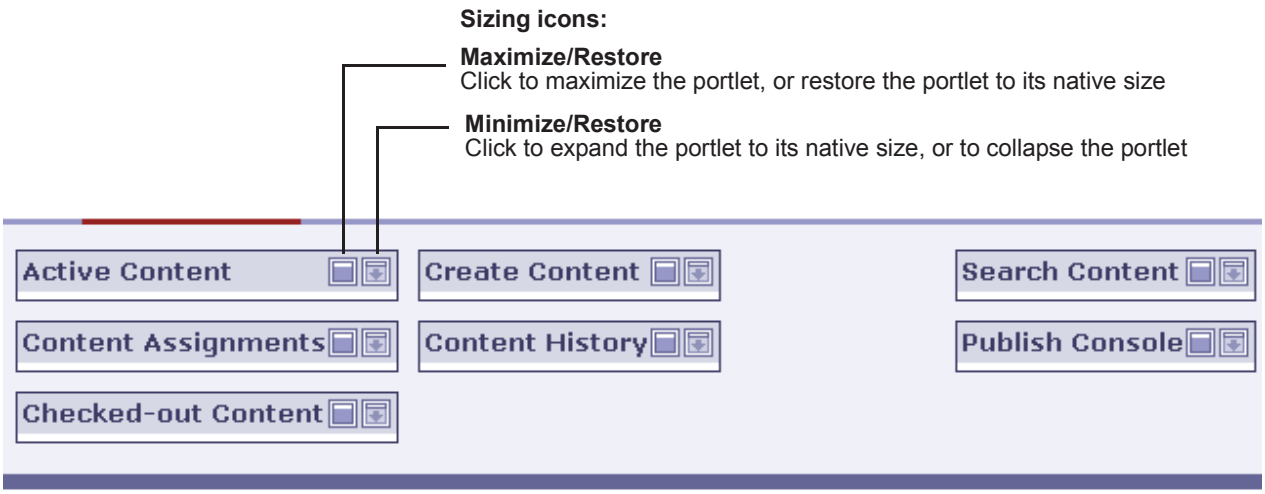
   The portal interface displays your workspace, containing the portlets you will use to manage content.

Note

The first time that you log in to your installation, the portlets are displayed at minimum size, by default. **We assume that you are logging in for the first time.**

2. Click the tab that contains the CM portlets. Your workspace will look similar to the one displayed in Figure 4:

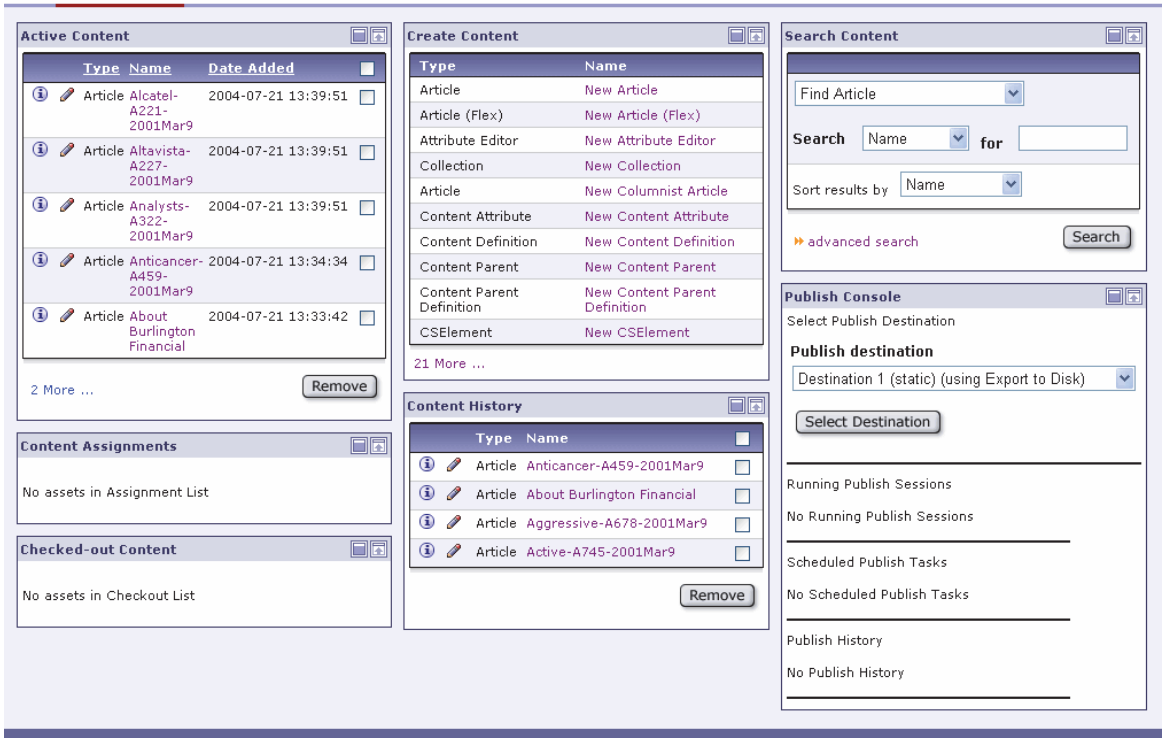
Figure 4: Your workspace



3. Expand the CM portlets to their native dimensions by clicking the minimize/restore icon in each portlet's upper right-hand corner (see Figure 4).

   When you have finished, your workspace will look similar to the one displayed in Figure 5.

Figure 5: CM portlets in a workspace



Your other sizing option is to expand any portlet to full-screen size by clicking its maximize/restore icon (in the portlet's upper-right hand corner).

Note that each portlet that lists assets also displays a set of content management tools next to each asset. The portlet's column headings serve as sort options. "Working with Assets" on page 36 provides descriptions of the content management tools and sort options within the portlets.

4. Now that you have maximized all of the CM portlets that you have access to, take some time to learn about them by reading the descriptions provided in Table 3, "Content Management (CM) portlets."
5. When you finish reading about CM portlets, proceed to the next section, "Document Management (DM) Portlets."

Table 3: Content Management (CM) portlets

CM Portlet	Description	See...
Active Content	Used to log your "favorite" assets for quick and easy access. "Active Content" treats your list of selected assets as permanent. The assets can be removed at your command, either individually or in bulk. If you have logged no assets, this portlet displays the message "No asset in Active List." **Note:** Content in the portal environment is referred to as "assets" and "asset types." For more information about assets and asset types, see "Basic Content Management Concepts" on page 17.	Chapter 8, "Logging Assets"
Checked-out Content	Displays a list of all assets that are checked out to you. In this portlet, you can check the assets back into the database (as well as inspect and edit them). If no assets are checked out to you, this portlet displays the message "No assets in Checkout List."	Chapter 10, "Revision Tracking"
Content Assignments	Displays a list of all assets that are assigned to you (by workflow processes). In this portlet you can review all your assignments and finish them (as well as inspect, edit, and delete the assignments). If no assets are assigned to you, this portlet displays the message "No assets in Assignment List."	Chapter 9, "Collaborating in Workflow"

Table 3: Content Management (CM) portlets *(continued)*

CM Portlet	Description	See...
Create Content	Used to create structured content assets, document assets, and folders (for definitions of these terms, see "Basic Content Management Concepts" on page 17). **Note:** A document asset requires you to attach a file to the asset. For information about how document assets differ from structured content assets, see "Structured Content Assets vs. Document Assets" on page 19.	Chapter 3, "Creating and Editing Structured Content Assets"
Content History	Displays a volatile index of assets. This portlet displays a list of the assets you have created during the current session. The list is volatile; when you end your session, the list is deleted. When you start a session and as long as you create no assets during the current session, this portlet displays the message "No assets in History List." **Note**: Assets can be logged to the portlet "Active Content," where they are displayed until you remove them there.	Chapter 3, "Creating and Editing Structured Content Assets"
Search Content	Used to: • Search for content by asset type • Execute simple and advanced searches	Chapter 7, "Searching for Assets"
Publish Console	Used to publish assets to the delivery system, where it is served to a browser so it can be viewed by the end audience.	Chapter 11, "Publishing"

Document Management (DM) Portlets

Several DM portlets can be displayed on the portal interface. You may have access to some or all of these portlets, depending on the permissions granted to you by your administrator.

To learn about the DM portlets

1. Click the tab that contains the DM portlets.
2. Expand the DM portlets to their native dimensions by clicking the minimize/restore icon in each portlet's upper right-hand corner (see Figure 4).

   Your other sizing option is to expand any portlet to full-screen size by clicking its maximize/restore icon (in the portlet's upper-right hand corner).

3. Now that you have maximized all of the DM portlets that you have access to, take some time to learn about them by reading the descriptions provided in Table 4, "Document Management (DM) portlets."

Table 4: Document Management (DM) portlets

DM Portlet	Description	See...
Active Documents	Used to log your "favorite" document assets for quick and easy access. "Active Documents" treats your list of selected assets as permanent. The assets can be removed at your command, either individually or in bulk. If you have logged no assets, this portlet displays the message "No assets in Active List." **Note:** Content in the portal environment is referred to as "assets" and "asset types." For more information about assets and asset types, see "Basic Content Management Concepts" on page 17.	Chapter 8, "Logging Assets"
Checked-out Documents	Displays a list of all document assets that are checked out to you. In this portlet, you can check the assets back in (as well as inspect and edit them). If no assets are checked out to you, this portlet displays the message "No assets in Checkout List."	Chapter 10, "Revision Tracking"
Document Assignments	Displays a list of all document assets that are assigned to you (by workflow processes). In this portlet you can review all your assignments and finish them (as well as inspect, edit, and delete the assignments). If no assets are assigned to you, this portlet displays the message "No assets in Assignment List."	Chapter 9, "Collaborating in Workflow"
Document History	Displays a volatile index of document assets. This portlet displays a list of the document assets you have created during the current session. The lists are volatile; when you end your session, the lists are deleted. When you start a session and as long as you create no assets during the current session, this portlet displays the message "No assets in History List." **Note**: Document assets can be logged to the portlet "Active Documents," where they are displayed until you remove them from there.	Chapter 5, "Creating and Editing Document Assets and Folders"

Table 4: Document Management (DM) portlets *(continued)*

DM Portlet	Description	See...
My Documents	Used to create, edit, and manage document assets and folders in which to organize the document assets. **Note:** A document asset requires you to attach a file to the asset. For information about how document assets differ from structured content assets, see "Structured Content Assets vs. Document Assets" on page 19.	Chapter 5, "Creating and Editing Document Assets and Folders"
Search Documents	Used to: • Search for document assets • Execute simple and advanced searches	Chapter 7, "Searching for Assets"

Arranging Your Workspace

After you have gained some experience with the content provider portlets and have a clear understanding of how to use them, you may want to re-position the portlets to suit your work habits. Using position controls in the portal itself, you can move the portlets to new positions and different pages. If you need instructions for doing this, see your administrator.

Working with Assets

This section describes the content management tools that you will use to work with assets. Be aware that Content Server and Spark are permissions-based, meaning that content providers who are not authorized by the administrator to execute a certain operation (edit, for example) will not be given the corresponding content management tool (an **Edit** icon, for example). The tools described below are identical to the tools in the CS standard interface.

Icon Bar

Portlets that list assets also display an icon bar  next to each asset, allowing the asset to be viewed, edited, or deleted. Depending on your access permissions, you may see one icon, or a combination of icons next to each asset.

Table 5: Portal Applications content management icons

Icon	Description
	**Preview** icon. (available in Content Server only) Clicking an asset's **Preview** icon opens a pop-up window that displays how an asset will look if it were rendered at the portal visitor's browser.
	**Inspect** icon. Clicking an asset's **Inspect** icon opens the asset's "Inspect" form, where you can: • Examine the asset's status (for example, determine the asset's state in a workflow) • Reset the asset's status (for example, remove the asset from workflow) • Edit the asset, by clicking its **Edit** icon. An example of an "Inspect" form can found in "Making Decisions About the Workflow Process" on page 107.
	**Edit** icon. Clicking an asset's **Edit** icon opens the asset's editorial screen (identical to the asset's content-entry screen). Here, you can edit the asset's content.
	**Delete** icon. Clicking an asset's **Delete** icon lets you delete the asset from the portal interface.

Active Links

Asset names are active links. Clicking the name of an asset listed in a portlet is equivalent to clicking on the asset's **Inspect** icon (described in the preceding table).

Note

Clicking the name of a document asset in the "My Documents" portlet opens the asset's associated file in its native application (e.g., Microsoft Word).

For both document assets and folders, clicking on the asset name is the same as clicking the asset's **Edit** icon. For information about document assets and folders, see Chapter 5, "Creating and Editing Document Assets and Folders."

Sort Options

Portlets that list assets also display column headings that index the assets by type, name, and so on. Underlined column headings are sort options. For example, in the portlet "Checked-out Content," the underlined headings are **Type, Name,** and **Checkout Date**. Clicking on **Type** sorts the listed asset types in either ascending or descending alphabetical order. Clicking on **Name** sorts the assets by name, and so on.

Required Fields

Throughout your work with assets, you will be populating fields with various types of information. Some fields require you to enter information, others do not. Required fields are marked with an asterisk (*) in the portal interface and in this guide (where they are also placed on a shaded background). If you fail to populate a required field and try to save the asset, you will be prompted with a message to provide the required information.

Logging Out of the Portal Interface

To log out of the portal interface

1. Click **Logout**.
2. Close your browser.

The Spark Sample Site

Content Server and Spark are packaged with a sample site that represents a portal belonging to a fictional company. Data underlying the portal is available to you for experimenting with your portal application and learning about its features.

Note

To follow procedures in this guide, we recommend that you use the sample site in order to avoid making accidental changes to your customized installation.

When logging in to the sample site, you can enter one of many user names and passwords. The users have different permissions to content, allowing you to experience your portal application from several points of view. We recommend that you log in as the Spark sample site administrator, with user name **admin** and password **xceladmin**. Administrative rights provide you with all the features and permissions of a fully empowered user.

Note

Logging in as an administrator provides you with the following portlets that are strictly for administrators: “Content Definition,” “Clear Checkouts,” “Clear Assignments,” “Publish,” and “Roles.” We recommend that you do not modify anything in these portlets, as this could interfere with the operation of the Spark sample site.

To log in to the Spark sample site

1. Open your Web browser and enter the appropriate URL:
   - If you are using Spark, enter the URL of the Spark installation that runs the sample site. Contact your administrator for the information.
   - If you are using Content Server, enter the URL of the CS portal interface.
2. Log in:
   a. In the “user name” field, enter **admin**.
   b. In the “Password” field, enter **xceladmin**.
   c. Click **Login**.
3. If you are using Spark, proceed to step 5.
4. If you are using the Content Server portal interface:
   a. Click one of the tabs displayed in the interface to access the “Site Info” portlet.
   b. In the “Site Info” portlet, select the Spark sample site.
5. You are now ready to begin experimenting with the workspace and its portlets.
   - For descriptions of the portlets, see Table 3, “Content Management (CM) portlets” on page 32 and Table 4, “Document Management (DM) portlets” on page 34.

- To start working with the portlets, follow the steps in “Learning Your Workspace” on page 30.

Next Steps

Now that you have a basic understanding of the portlets and your content management tools, you are ready to use the portlets to create and edit content, advance it through workflow, and approve it for publication. When following instructions in this guide, consider using the Spark sample site in order to avoid making inadvertent changes to your own installation.

Chapter 3

Creating and Editing Structured Content Assets

As a content provider, you will sometimes need to work in a structured environment, where you are guided to provide specific types of content. Content Server and Spark support structured environments by enabling you to create and edit structured content assets (assuming that your administrator has granted you the permission to work with structured content assets).

Creating a structured content asset involves using content-entry forms whose fields, pre-configured by the administrator, prompt you for certain information (for example, a phone number, an e-mail address, or a description of a stock item) that you save to the application's database (instead of a file). More information about structured content assets is given in "Structured Content Assets vs. Document Assets" on page 19.

This chapter shows you how to create and edit structured content assets. It contains the following sections:

- Creating Structured Content Assets
- Previewing Structured Content Assets
- Editing Structured Content Assets
- Deleting Structured Content Assets

Creating Structured Content Assets

Structured content assets are created using the hyperlinks in the "Create Content" portlet. This section provides instructions on creating structured content assets in Spark and Content Server.

Note that files cannot be attached to structured content assets. If you need to attach files, you must create document assets. For instructions, see Chapter 5, "Creating and Editing Document Assets and Folders."

To create a structured content asset (Spark)

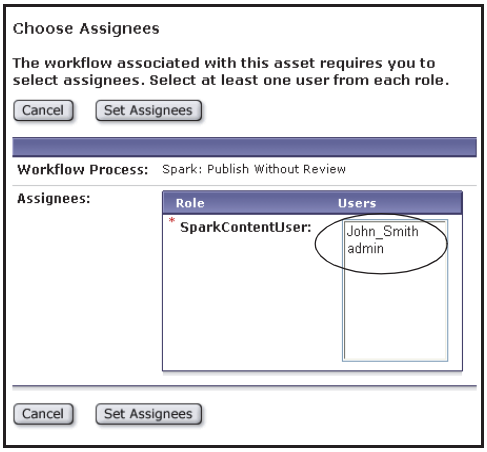
1. Maximize the portlet "Create Content."
2. In the "Name" column, select the desired type of asset (**New Spark Contact** in this example).

3. If the "Choose Assignees" screen (at the right) is not displayed, it means that your asset is either not associated with a workflow or is associated with a workflow that does not require choosing assignees. Skip to step 4 of this procedure. Otherwise, continue with this step.

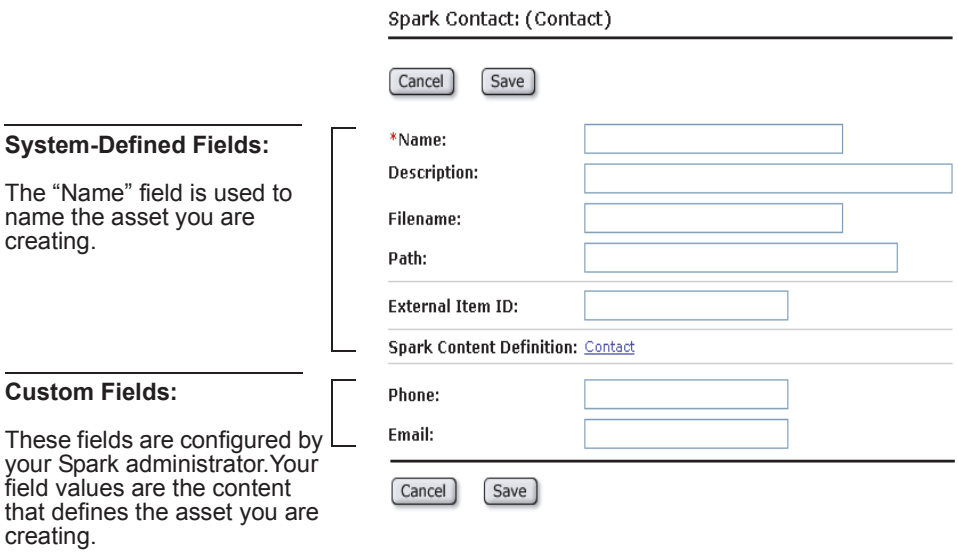
   a. In the "Assignees" panel, go to the "Users" list box and select the workflow assignees—users to whom you are assigning this asset. Any of these users can complete the next step in the workflow process. To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user.

      (If you need information about workflow, see Chapter 9, "Collaborating in Workflow.")

   b. Click **Set Assignees**.



4. Enter information in to the fields of the content-entry form that is displayed. In this example, the content-entry form is named “Spark Contact: (Contact).”



Note that any field with an asterisk next to it is required; you will not be able to save the asset without entering information in to required fields. In our example **Name** is a required field.

See Table 6 on page 44 for descriptions of the system-defined fields in the Spark content-entry form. Your Spark administrator can help you with custom fields, which are not described in this table.

Table 6: Field descriptions for the structured content asset content-entry form

	Field Name	Description
System-defined fields	*Name	The name of the asset you are creating. The name that you enter will be used to index the asset in the portal interface.
	Description	Description of the current asset.
	Filename	(Content Server only) The name to use for the file that is created for this asset during the Export to Disk publishing method. (See the *Content Server User's Guide* for details on the Export to Disk publishing method.)
	Path	(Content Server only) The directory path to use for the file that is created for this asset when the Export to Disk publishing method is used. (See the *Content Server User's Guide* for details on the Export to Disk publishing method.)
	Content Definition	This link opens the "Inspect" form for the asset type definition of the new asset. Administrators and site developers are responsible for creating and modifying asset type definitions.
Custom fields	Defined by administrator or site developers	These fields are created by your administrator or site developers as attributes that define the asset type, and prompt you for specific content. If you need information about these fields, see your administrator or site developers.

5. Click **Save** to save the asset.

   Spark lists your newly created asset in the portlet "Content History" for the rest of the session. When you end your session, the list is deleted.

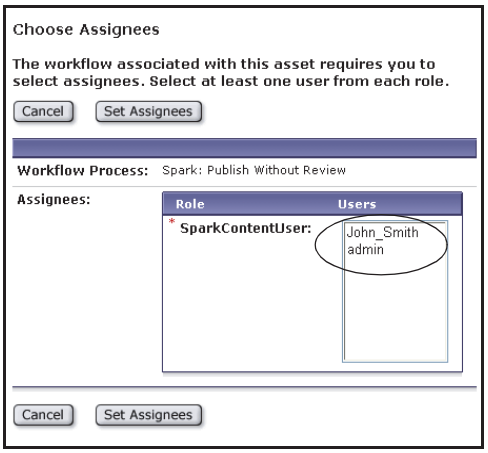
6. If you want to log your new asset in a permanent list for easy access, save it to "Active Content." You can remove the asset from the list, as necessary. For instructions, see Chapter 8, "Logging Assets."

To create a structured content asset (CS)

1. Maximize the portlet "Create Content."
2. In the "Name" column, select the desired asset type (**New Spark Contact** in this example).

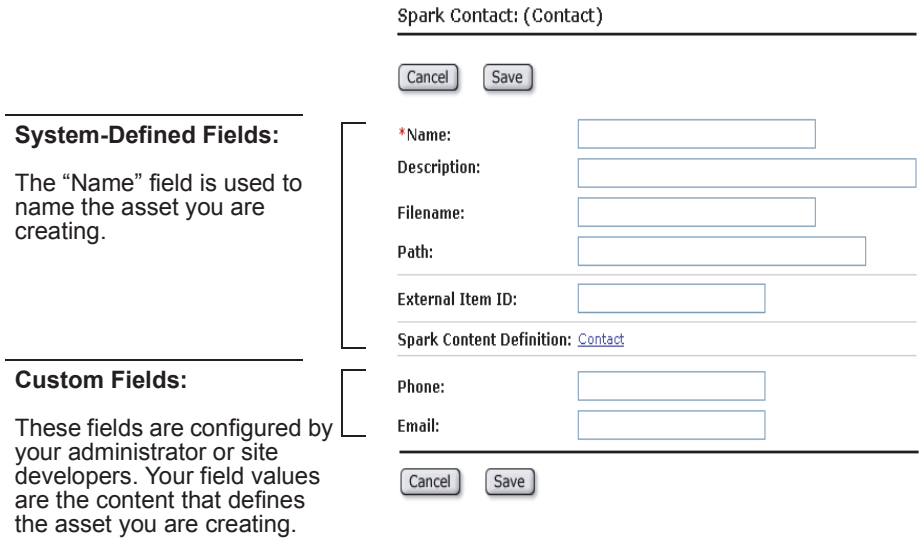
3. If the "Choose Assignees" screen (at the right) is not displayed, it means that your asset is either not associated with a workflow or is associated with a workflow that does not require choosing assignees. Skip to step 5 of this procedure. Otherwise, continue with this step.
   a. In the "Assignees" panel, go to the "Users" list box and select the workflow assignees—users to whom you are assigning this asset. Any of these users can complete the next step in the workflow process. To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user.

      (If you need information about workflow, see Chapter 9, "Collaborating in Workflow.")



   b. Click **Set Assignees**.
4. The asset type you are working with may be divided into subtypes. If this is the case, a screen appears in which you need to select the subtype of the new asset. If this screen does not appear, proceed to the next step. If the screen does appear, do the following:
   a. Select a definition (the subtype) from the "Definition" drop-down list.
   b. Enter a name for the asset in the "Name" field.
   c. Click **Continue**.

5. Enter information in to the fields of the content-entry form that is displayed. In this example the form is named “Spark Contact: (Contact).”



Note that any field with an asterisk next to it is required; you will not be able to save the asset without entering information in required fields. In our example **Name** is a required field.

See Table 6 on page 44 for descriptions of the system-defined fields in the structured content asset content-entry form. Your site developers can help you with custom fields, which are not described in this table.

Note

The custom fields in the content-entry form will vary depending on the asset type, because your site developers configure the fields for each asset type.

Additional fields may be displayed depending on which add-on products (such as Engage) are installed. If you need information for the fields in the content-entry form for a recommendation, promotion, or segment, see the *Content Server User’s Guide*, which contains a chapter for each of these types of assets.

6. Click **Save** to save the asset.

   The portal interface lists your newly created asset in the portlet “Content History” for the rest of the session. When you end your session, the list is deleted.

7. If you want to log your new asset in a permanent list for easy access, save it to “Active Content.” You can remove the asset from the list, as necessary. For instructions, see Chapter 8, “Logging Assets.”

Previewing Structured Content Assets

Note to Spark Users

The preview feature is not available in Spark.

However, if you need to edit a structured content asset that has large blocks of text, complete the following steps to view the asset in a display that minimizes the amount of scrolling you have to do.

1. Find the asset in the portal interface (by running a search or looking for the asset in the "Active Content" or "Content History" portlet).
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, read the text field(s) and take note of the changes you want to make.
4. To edit the text, click the asset's **Edit** icon, make your changes, and click **Save Changes**.

In the Content Server portal interface, you can preview any asset that has a template asset selected for it. The preview feature also lets you select other templates to use in order to preview the same asset.

To preview a structured content asset (CS)

1. Find the asset in the portal interface. These are some of your options:
   - Run a search on the asset. For instructions, see Chapter 7, "Searching for Assets."
   - Look for the asset in the portlet "Active Content," assuming that you keep an active list (for more information about "Active Content," see Chapter 8, "Logging Assets").
   - If the asset was created during the current session, look for the asset in the portlet "Content History."
2. Click the asset's **Preview** icon.
3. The asset will be displayed in a new browser window, using the default template for the display format.
4. To preview the asset with a template other than its default template, select the template that you want to use from the drop-down list of templates displayed in the browser.

Editing Structured Content Assets

Editing a structured content asset means modifying its content rather than its status or properties.

To edit a structured content asset

1. Find the asset in the portal interface. These are some of your options:
   - Run a search on the asset. For instructions, see Chapter 7, "Searching for Assets."
   - Look for the asset in the portlet "Active Content," assuming that you keep an active list (for more information about "Active Content," see Chapter 8, "Logging Assets").
   - If the asset was created during the current session, look for the asset in the portlet "Content History."
2. If desired, preview the asset using the procedure "Previewing Structured Content Assets."
3. Click the asset's **Edit** icon.

   Note

   You will not be able to edit this asset if one of the following holds:

   - The asset is checked out to another user.
   - You have no permission to edit the asset.

   The portal interface notifies you of each condition by displaying the message "Cannot perform this operation."

4. Make your changes, and click **Save Changes**.

   The system refreshes the asset's "Inspect" form, confirming the changes. If you click **Cancel** instead, the asset remains unchanged in the "Inspect" form.

Editing with eWebEditPro

eWebEditPro is a popular third-party WYSIWYG HTML editor available from Ektron, Inc. If your system is set up to use this product, the editor will appear as part of the New or Edit form for an associated text field.

This editor allows you to apply style characteristics such as bold, italics, and underlining. You can change font size and color, make bulleted lists, and insert hyperlinked text. Your changes to the contents of the text field are instantly visible in the editor window.

You can also use eWebEditPro to edit fields in InSite Editor (see the following section).

Caution

If the eWebEditPro toolbar includes an upload image option, consult your administrator before using this option. An image uploaded in this manner is not an asset, and will not be mirror published when the asset that uploaded it is published to the delivery system.

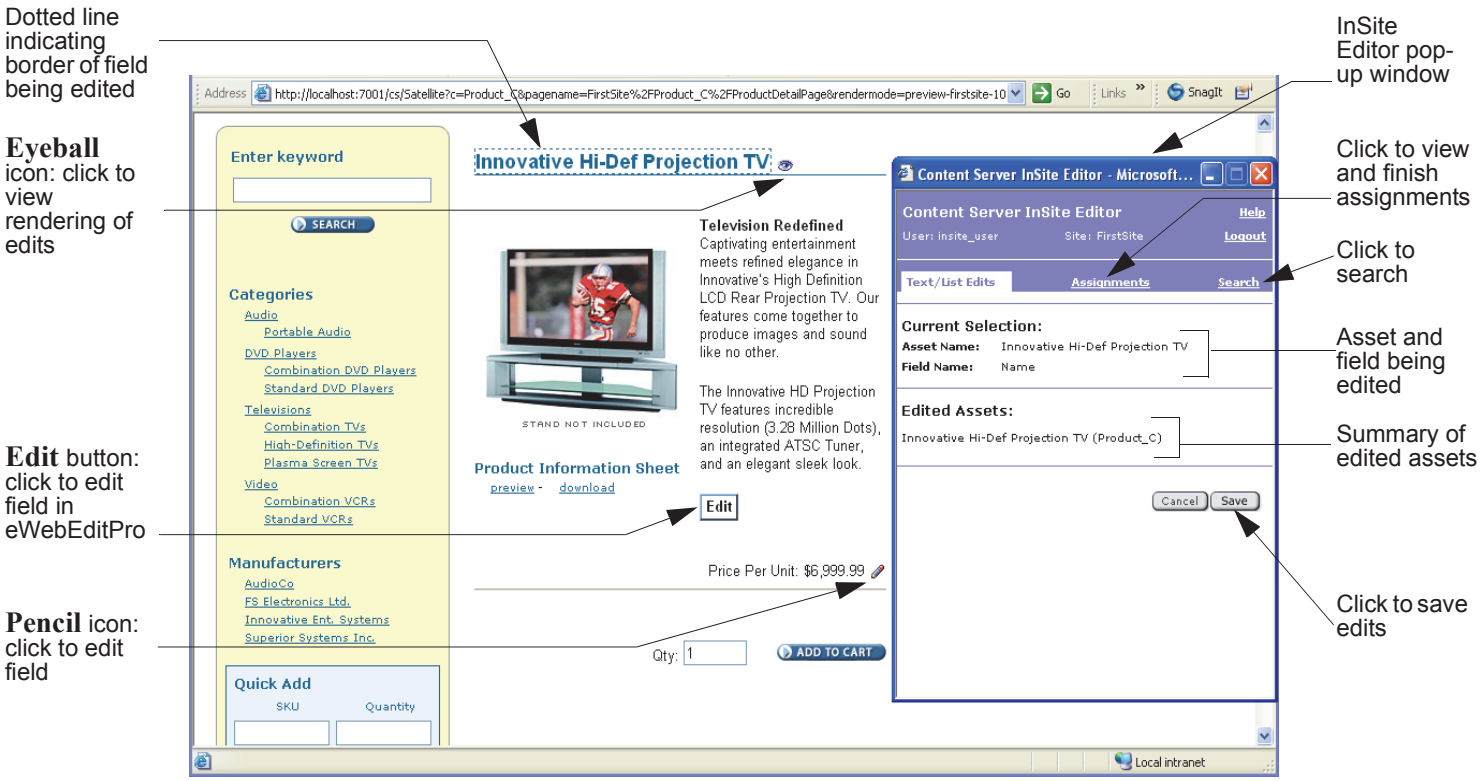
Editing in InSite Editor (CS Portal Interface)

The CS portal interface also supports a tool called InSite Editor, which allows content providers to make changes directly on a site content page. To use InSite Editor:

- You must be using Internet Explorer 5.5 or higher for Windows (no other browser is currently supported).
- The template used to display the page you are editing must be coded accordingly.

When you view an editable page in your browser window, a pencil icon appears next to fields that can be edited directly on that page. When you click the pencil, it changes to an eyeball icon, and the field is enclosed in a dotted line, indicating that you can make your edits to the text within the box. If the field is protected by revision tracking, a lock icon replaces the pencil icon to indicate that the field cannot currently be edited.

There is also a separate InSite Editor window, where you can click the **Save** button to commit your edits to the Content Server database. The InSite Editor window enables you to check asset status, complete workflow assignments, and perform asset searches. You can learn more about using InSite Editor by accessing its online Help.



Deleting Structured Content Assets

To delete a structured content asset

1. Find the asset that you want to delete. These are some of your options:
   - Run a search on the asset. For instructions, see Chapter 7, "Searching for Assets."
   - Look for the asset in the portlet "Active Content," assuming that you keep an active list (for more information about "Active Content," see Chapter 8, "Logging Assets").
   - If the asset was created during the current session, look for the asset in the portlet "Content History."
2. Click the asset's **Delete** icon.

   The portal interface displays one of the following:
   - A prompt asking you to confirm the deletion of this asset. Go to step 3.
   - A message indicating that the asset is associated with other assets. In the message is a list of links to the associated assets so you can remove the associations and try again. When you have removed all the associations, go to step 3.
3. Click **Delete this Item**.

   The asset is removed from the interface, and is no longer accessible (for example, the asset is no longer available for editing or for retrieval by searches).

Note

You can also delete an asset by clicking the **Delete** icon on its "Inspect" form.

Chapter 4

Working with ‘My Documents’

The portlet “My Documents” provides you with a virtual file-management system that lists folders and document assets that you and other content providers have created.

Using “My Documents” you can create a hierarchical structure of folders and document assets, and reorganize existing hierarchies. Using “My Documents” as an alternative to the portlet “Create Content,” you can also create folders and document assets. This chapter shows you how to work with the folders and documents hierarchy.

This chapter contains the following sections:

- Overview of the ‘My Documents’ Portlet
- Navigating the ‘My Documents’ Portlet

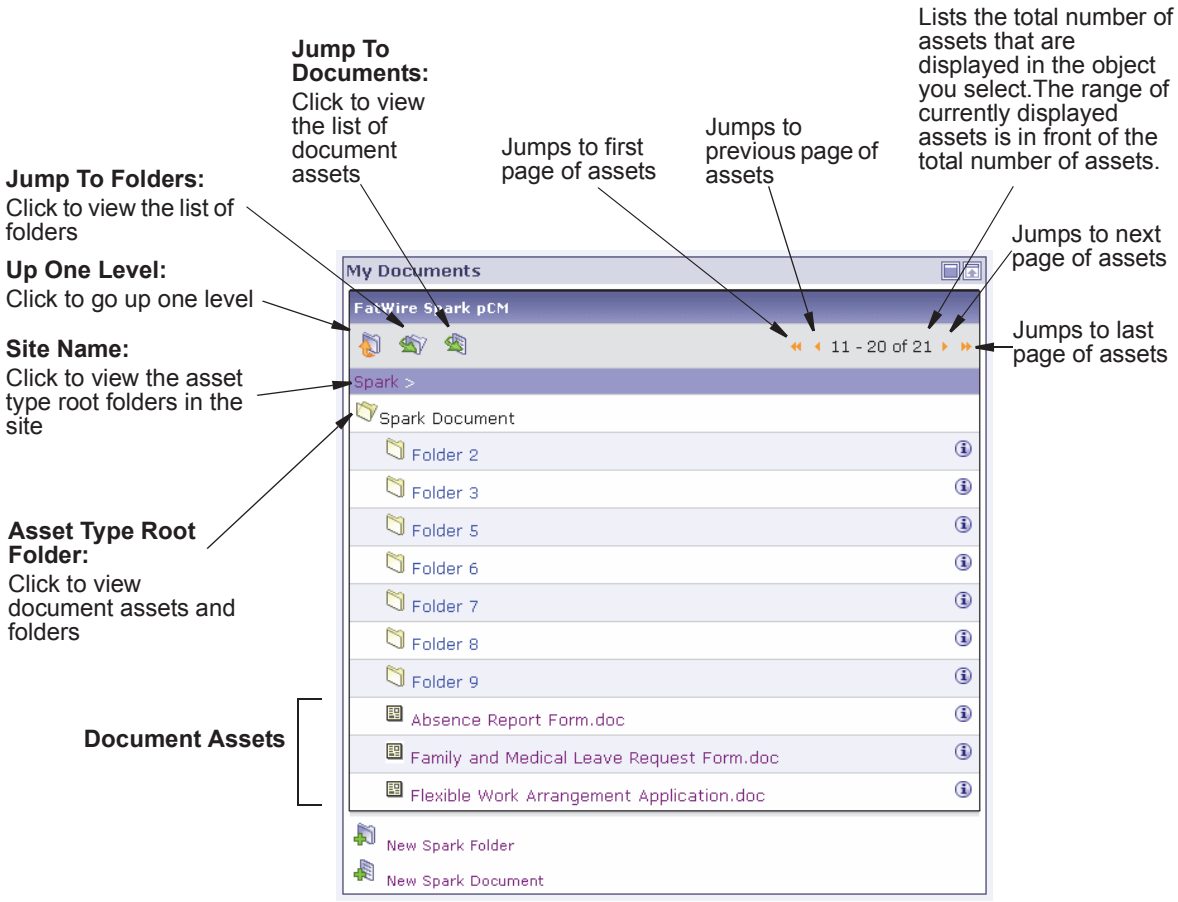
Overview of the ‘My Documents’ Portlet

The “My Documents” portlet displays a site’s document assets and folders in their hierarchical order. As part of creating and editing document assets and folders, you also create and manage the hierarchy that is displayed in this portlet.

Figure 6 displays several folders and document assets in the “My Documents” portlet. Figure 6 also explains the navigational tools available in the portlet.

By default, this portlet lists 10 items per page. Clicking the **Jump to Folders** icon takes you to the top of the folders list, and clicking the **Jump to Documents** icon takes you to the top of the documents list.

Figure 6: ‘My Documents’ portlet



‘My Documents’ Portlet Structure

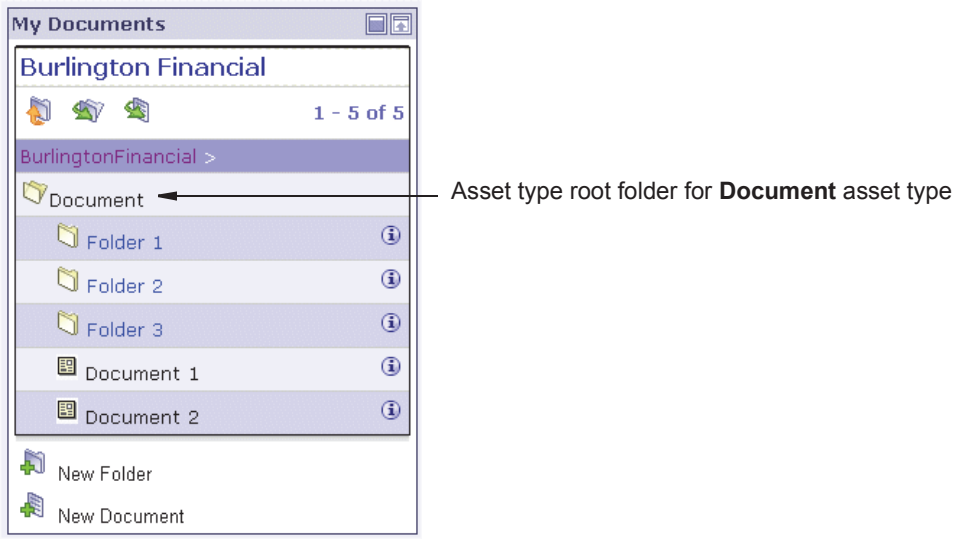
The document assets and folders displayed in the “My Documents” portlet are organized according to asset type. Each asset type has its own root folder, which this guide refers to as the *asset type root folder*. Clicking a site name in the “My Documents” portlet displays all of the asset type root folders for that site.

Note for Spark Users

Spark supports only one document asset type, the system-defined **Spark Document** asset type. Therefore, Spark users will see only one asset type root folder, **Spark Document**, in the “My Documents” portlet.

From the asset type root folder you can navigate through your folders, view document assets, or inspect and edit document parameters. Expanding an asset type root folder displays the document assets of that asset type and the sub-folders associated with the asset type (Figure 7 displays an example of this).

Figure 7: An expanded asset type root folder in ‘My Documents’



Note

You can expand only one asset type root folder at a time in the “My Documents” portlet.

Navigating the ‘My Documents’ Portlet

In both Spark and the CS portal interface, you can navigate through different folders to view their associated document assets.

To view the documents and sub-folders in an asset type root folder

If your site does not have any content, you can log in to the Spark sample site to learn how to view document assets and folders. (If you need instructions for logging in to the Spark sample site, see “To log in to the Spark sample site” on page 38.)

1. Maximize the portlet “My Documents.”
2. Click the name of an asset type root folder to display its document assets and sub-folders. (If you do not see asset type root folders, click the site name displayed in the portlet.)
   - If there are folders or document assets in the root folder they are displayed.
   - If more than 10 folders or assets are in the root folder, use the arrow keys in the upper right-hand corner to navigate the portlet (see Figure 6, “‘My Documents’ portlet” on page 52).
3. To expand a sub-folder, click its name. Continue to navigate through the folder hierarchy by clicking sub-folders.
4. To collapse a folder, click the **Up One Level** icon  .
5. To collapse all expanded sub-folders, click the name of the asset type root folder.

To use the ‘My Documents’ portlet navigation icons

The navigation icons at the top of the “My Documents” portlet can be used to navigate between different folders or to change your view of the hierarchy.

- To navigate up one level, click the **Up One Level** icon:  .
  The parent folder for the document asset or folder is displayed.
- To view all of the sub-folders in a folder, click the **Jump To Folders** icon:  .
- To view all the document assets in a folder, click the **Jump To Documents** icon:  .

Chapter 5

Creating and Editing Document Assets and Folders

As a content provider, you will often work in a file-based environment, where you have the freedom to compose content of your own choice, and express it in your own format and presentation style.

Content Server and Spark support document management by allowing you to create document assets and folders (assuming that your administrator has granted you the permission to work with document assets).

This chapter shows you how to create and edit document assets. It contains the following sections:

- Working with Document Assets
- Working with Folders

Working with Document Assets

You can use either the “My Documents” portlet or the “Create Content” portlet to create a document asset. Your access to these portlets depends on the permissions granted to you by your administrator.

Note

The “My Documents” portlet allows you to create only document assets and folders. The “Create Content” portlet allows you to create structured content assets, and document assets and folders.

This section shows you how to create, edit, and delete document assets. If you need information about document assets and how they differ from structured content assets, see “Structured Content Assets vs. Document Assets” on page 19.

Creating Document Assets

Creating a document asset involves attaching a file (of any format) with publishable content to the document asset. Optionally, you can specify attributes such as the file’s author and subject. Both the file and its attributes make up the document asset. The file provides the publishable content. The document asset keeps a record of the file, its name, and its location.

Document assets and folders that you create during a session are logged in the portlets “Document History” and “Content History” for the length of the session. When you end your session, the assets are removed from the portlets. You can create a permanent log by saving the assets to your active list. Document assets and folders saved to the active list are displayed in the “Active Documents” portlet and the “Active Content” portlet.

Note

Your access to portlets depends on the permissions granted to you by your administrator. For example, you may only have access to Document Management portlets, and therefore would have not access to the “Content History” and “Active Content” portlets.

Creating Document Assets in Spark

This section provides procedures on how to use the “My Documents” and “Create Content” portlets to create document assets in Spark.

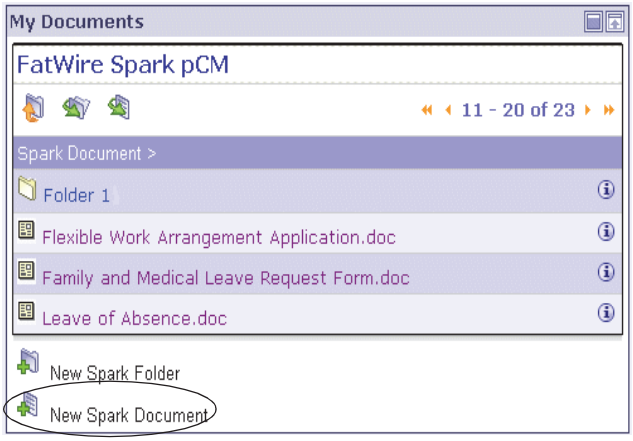
Before creating a document asset (Spark)

1. Obtain or create the file that you plan to attach to the document asset. If the file is not available, you will need to interrupt this procedure, obtain (or create) the file, and restart this procedure. The file can be of any type (for example, .doc, .ppt, or .xls) and must reside on your local machine (or on a network drive that you can access).

2. If you will be assigning your document asset to the **Spark Document** root folder, proceed to step 3. Otherwise, you will be assigning your document asset to a sub-folder. Make sure the folder exists, or create one if necessary:
   - To check for the folder, run a search (if you need help, see Chapter 7, "Searching for Assets").
   - To create a folder, follow the steps in "To create a folder (Spark)" on page 72.
3. Continue to the procedure "To create a document asset using the 'My Documents' portlet (Spark)," or "To create a document asset using the 'My Documents' portlet (Spark)" on page 57.

To create a document asset using the 'My Documents' portlet (Spark)

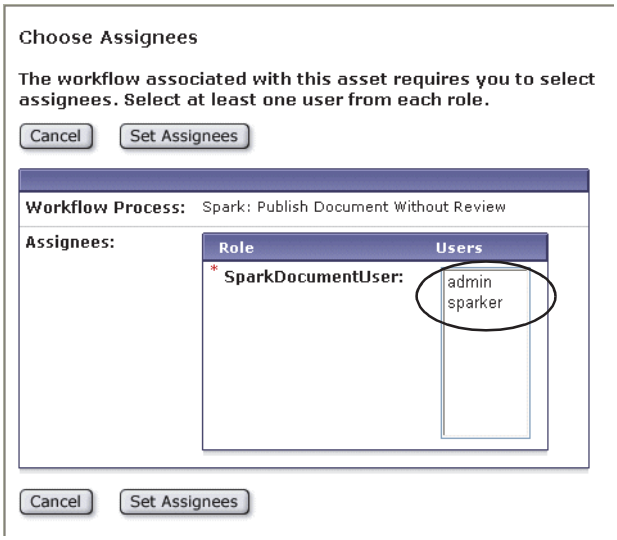
1. Maximize the portlet "My Documents."
2. Click the **Spark Document** folder. (If you do not see the **Spark Document** folder, click the site name displayed in the "My Documents" portlet.)
3. Click the **New Spark Document** icon at the bottom of the portlet.



4. If the "Choose Assignees" screen (see below) is not displayed, your asset is either not associated with a workflow or is associated with a workflow that does not require choosing assignees. Skip to step 5 of this procedure. Otherwise, continue with this step.

   (If you need information about workflow, see Chapter 9, "Collaborating in Workflow.")

In the "Choose Assignees" screen, do the following:



a. In the "Assignees" panel, go to the "Users" list box and select the assignees—users to whom you are assigning this asset. Any of these users can complete the next step in the workflow process.

To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-contiguous users, **Ctrl-click** each user.

b. Click **Set Assignees**.

5. Fill in the fields in the "Spark Document: (Spark Document)" form. See Table 7 on page 59 if you need field descriptions.

System-Defined Fields:

The "Name" field is used to name the asset you are creating.

The file that you select in the "File" field provides the content of the asset.

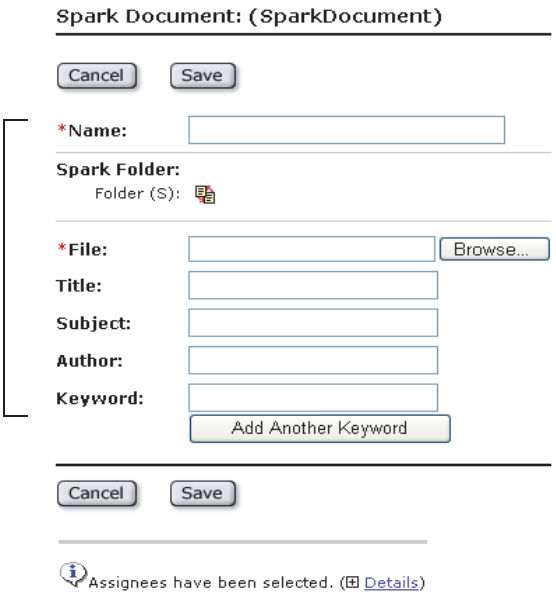


Table 7: Field descriptions for the 'Spark Document' content-entry form

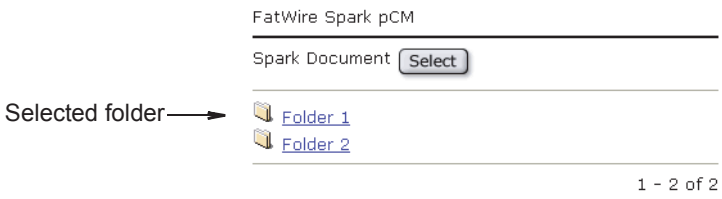
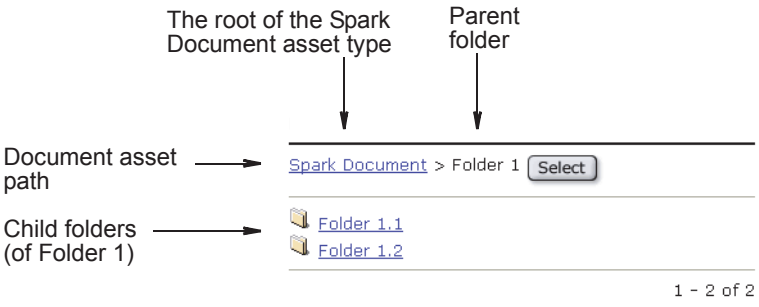
Field Name	Description
*Name	The name of the document asset you are creating. The name that you enter will be used to identify the asset in the portlets.
Spark Folder	This is the folder to which you are assigning the document asset. (The folder is the parent of the document asset.) If you leave this field blank, the document asset will be placed in the **Spark Document** folder and displayed as a line item in the portlet "My Documents." **To select a parent folder (Spark)** **a.** Click the folders icon ( ) to display the selection of possible folders. **b.** Choose one of the options (**Folder 1**, in this example) and click **Select**.  The path to your document asset will be as shown at the top of the screen, as in the figure below.  **c.** If you want to choose a child folder, select it from the left-hand list. **d.** Click **Select** to return to the previous screen and continue to the next field.

Table 7: Field descriptions for the 'Spark Document' content-entry form *(continued)*

Field Name	Description
File	The file you want to attach to the document asset. The file can be of any type and must reside on your local machine or a locally accessible network drive.
Title	The title of the attached file.
Subject	The subject matter of the attached file.
Author	The file's author.
Keyword	A one-word comment or description of the file. If you need additional keywords, click **Add Another Keyword**.

6. Click **Save** to save the document asset.
7. Spark returns you to the portlet "My Documents" and logs your newly created asset in the following portlets:
   - "My Documents." The asset is listed either in the root, or in the folder to which you assigned the asset.
   - "Document History" (and "Content History"), where the asset remains listed for the rest of the current session. When you end your session, the history list is deleted from the portlet.
   - If you want to log your new asset in a permanent index for easy access, save it to the active list. You can later remove the asset from the list, as necessary. For instructions on saving assets to the asset list see Chapter 8, "Logging Assets."

To create a document asset using the 'Create Content' portlet (Spark)

1. Maximize the portlet "Create Content."
2. Click **New Spark Document** in the "Name" column.

3. From this point forward, the procedure is the same as when using the "My Documents" portlet to create document assets. Follow steps 4 through 6 in "To create a document asset using the 'My Documents' portlet (Spark)" to finish creating the new asset.

> **Note**
>
> When you create a document asset from the "Create Content" portlet, the content-entry form displays fields that are not directly related to your task of creating a new document asset.
>
> If you want to simplify your view of the content-entry form, click the **Document Management View** link. This view displays only document management fields (the fields that are displayed when creating a new document asset from the "My Documents" portlet).
>
> If you would like to return to the view that displays all of the fields, right-click in the content-entry form and select **Back** in the popup menu.

4. The portal interface returns you to the portlet "Create Content" and logs your newly created asset in the following portlets:
   - "My Documents." The asset is listed either in the root, or in the folder to which you assigned the asset.
   - "Content History" (and "Document History"), where the asset remains listed for the rest of the current session. When you end your session, the history list is deleted from the portlet.
   - If you want to log your new asset in a permanent index for easy access, save it to the active list. You can later remove the asset from the list, as necessary. For instructions on saving assets to the asset list see Chapter 8, "Logging Assets."

Creating Document Assets in the CS Portal Interface

This section provides procedures on how to create a document asset in the CS portal interface using the "My Documents" and "Create Content" portlets.

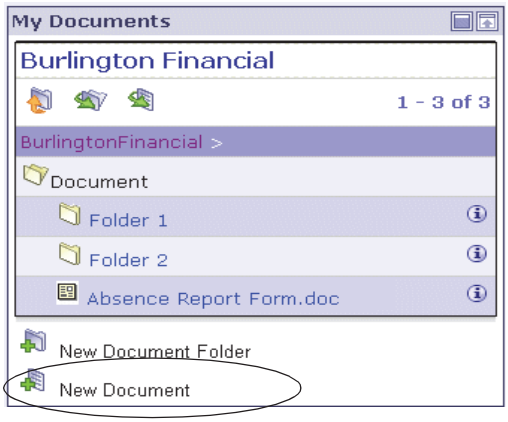
Your access to these portlets depends on the permissions granted to you by your administrator.

Before creating a document asset (CS)

1. Obtain or create the file that you plan to attach to the document asset. If the file is not available, you will need to interrupt this procedure, obtain (or create) the file, and restart this procedure. The file can be of any type (for example, .doc, .ppt, or .xls) and must reside on your local machine (or on a network drive that you can access).
2. If you will be assigning your document asset to the asset type root folder, proceed to step 3. Otherwise, you will be assigning your document asset to a sub-folder. Make sure the folder exists, or create one if necessary:
   - To check for the folder, run a search (if you need help, see Chapter 7, "Searching for Assets").
   - To create a folder, follow the steps in "To create a folder (CS)" on page 73.
3. Continue to the procedure "To create a document asset using the 'My Documents' portlet (CS)," or "To create a document asset using the 'Create Content' portlet (CS)" on page 67.

To create a document asset using the 'My Documents' portlet (CS)

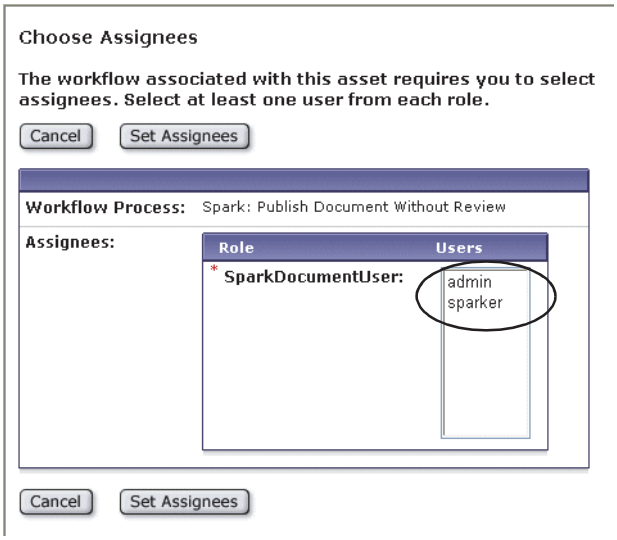
1. Maximize the portlet "My Documents."
2. Click the name of the asset type root folder of the asset you are creating. (If you do not see this folder, click the site name displayed in the "My Documents" portlet).
3. Click the new document icon  for the asset type of your new asset, located at the bottom of the portlet. The name next to the icon depends on how your site developers defined the asset type.



4. If the "Choose Assignees" screen (see below) is not displayed, it means that your asset is either not associated with a workflow or is associated with a workflow that does not require choosing assignees. Proceed to step 5. Otherwise, continue reading.

   (If you need information about workflow, see Chapter 9, "Collaborating in Workflow.")

In the "Choose Assignees" screen, do the following:

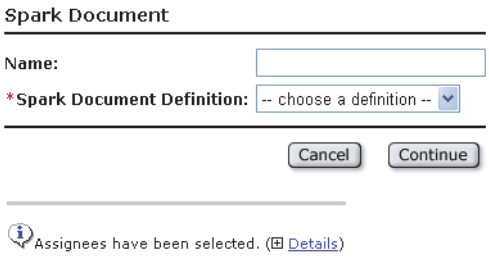


a. In the "Assignees" panel, go to the "Users" list box and select the workflow assignees—users to whom you are assigning this asset. These users can complete the next step in the workflow process.

To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-contiguous users, **Ctrl-click** each user.

b. Click **Set Assignees**.

5. The asset type you are working with may be divided into subtypes. If this is the case, a screen will appear in which you will need to select the subtype of the new asset. If this screen does not appear, proceed to the next step. If this screen appears, do the following:



a. Select a definition (the subtype) from the "Definition" drop-down list.

b. Enter a name for the asset in the "Name" field.

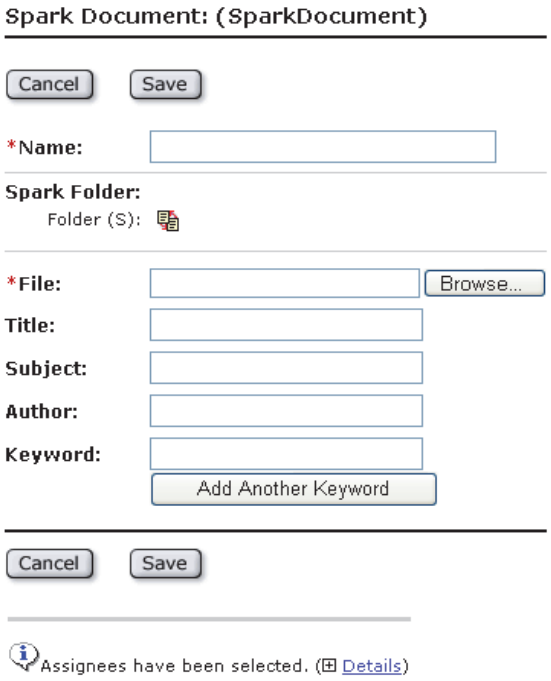
c. Click **Continue**.

6. Fill in the fields of the content-entry form that is displayed. In our example, the “Spark Document: (Spark Document)” form is displayed.

System-Defined Fields:

The “Name” field is used to name the asset you are creating.

The file that you select in the “File” field provides the content of the asset.



The fields in the form will vary depending on how your developers defined the document asset type.

See Table 8 on page 65 if you need descriptions for the system-defined fields in the content-entry form. Your site developers can help you with custom fields, which are not described in this table.

Table 8: Field descriptions for the document asset content-entry form

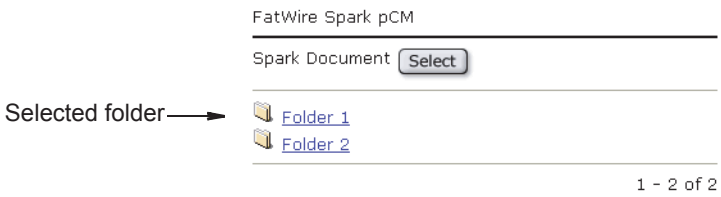
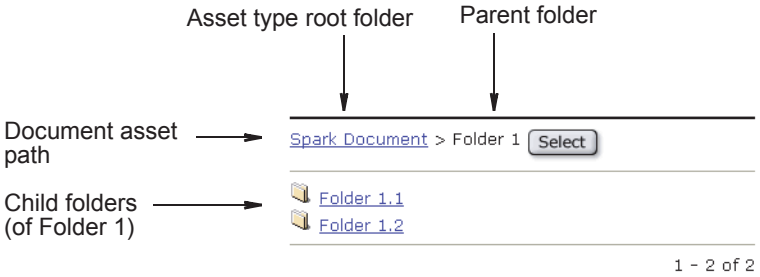
	Field Name	Description
System-defined fields	*Name	The name of the document asset you are creating. The name that you enter will be used to identify the asset in the portlets.
	Folder	This is the folder to which you are assigning the document asset. (The folder is the parent of the document asset.) The name of this field depends on how your site developers named parent folders. **Note**: If you leave this field blank, the document asset will be placed in the asset type root folder. **To select a parent folder (CS)** **a.** Click the folders icon ( ) to display the selection of possible folders. **b.** Choose one of the options (**Folder 1**, in this example) and click **Select**.  The path to your document asset will be as shown at the top of the screen, as in the figure below.  **c.** If you want to choose a child folder, select it from the left-hand list. **d.** Click **Select** to return to the previous screen and continue to the next field.

Table 8: Field descriptions for the document asset content-entry form *(continued)*

	Field Name	Description
System-defined fields *(continued)*	File	The file you want to attach to the document asset. The file can be of any type and must reside on your local machine or a locally accessible network drive.
	Title	The title of the attached file.
	Subject	The subject matter of the attached file.
	Author	The file's author.
Custom fields	Defined by site developers	These fields are created by your site developers as attributes that define the asset type, and prompt you for specific content. If you need information about these fields, see your site developers.

7. Click **Save** to save the document asset.
8. The portal interface returns you to the portlet "My Documents" and logs your newly created asset in the following portlets:
   - "My Documents." The asset is listed either in the root, or in the folder to which you assigned the asset.
   - "Content History" and "Document History" where the asset remains listed for the rest of the current session. When you end your session, the history list is deleted from the portlet.
   - If you want to log your new asset in a permanent index for easy access, save it to the active list. You can later remove the asset from the list, as necessary. For instructions on saving assets to the asset list see Chapter 8, "Logging Assets."

To create a document asset using the 'Create Content' portlet (CS)

1. Maximize the portlet "Create Content."
2. In the "Name" column, select the desired type of asset.
3. From this point forward, the procedure is the same as when using the "My Documents" portlet to create document assets. Follow steps 4 through 7 in "To create a document asset using the 'My Documents' portlet (CS)" to finish creating the new asset.

> **Note**
>
> When you create a document asset from the "Create Content" portlet, the content-entry form displays content management fields (such as fields related to publishing) that are not directly related to your task of creating a new document asset.
>
> If you want to simplify your view of the content-entry form, click the **Document Management View** link. This view displays only document management fields (the fields that are displayed when creating a new document asset from the "My Documents" portlet).
>
> If you would like to return to the view that displays all of the fields, right-click in the content-entry form and select **Back** in the popup menu.

4. The portal interface returns you to the portlet "Create Content" and logs your newly created asset in the following portlets:
   - "My Documents." The asset is listed either in the root, or in the folder to which you assigned the asset.
   - "Content History" and "Document History" where the asset remains listed for the rest of the current session. When you end your session, the history list is deleted from the portlet.
   - If you want to log your new asset in a permanent index for easy access, save it to the active list. You can later remove the asset from the list, as necessary. For instructions on saving assets to the asset list see Chapter 8, "Logging Assets."

Editing Document Assets

Editing a document asset means modifying the content of the attached file. The file must first be downloaded to your local machine or an accessible network drive, edited, and then uploaded to replace the older version.

To edit a document asset

Complete the following procedure to edit a document asset.

Download and edit the file

1. Find the document asset containing the file you want to edit. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. At the top of the "Inspect" form, click the asset's **Edit** icon.

Note

- You will not be able to edit an asset if one of the following holds:
  - The asset is checked out to another user.
  - You have no permission to edit the asset.

  The portal interface notifies you of each condition by displaying the message "`Cannot perform this operation`."
- When you access a document asset from a content management portlet, (such as "Search Content"), you will see a **Document Management View** link in the content-entry form. Because you are accessing the document asset from a content management portlet, the content-entry form will display content management fields (such as fields related to publishing) that may be not be directly related to your task of editing the document asset.

  If you want to simplify your view of the content-entry form, click the **Document Management View** link. This view displays only document management fields (the fields that are displayed when creating a new document asset from the "My Documents" portlet).

  If you would like to return to the view that displays all of the fields, right-click in the content-entry form and select **Back** in the popup menu.

4. Go to the "File" field and click the link **view this item**.

   The "File Download" screen appears.

5. Click **Open**.

> **Note**
>
> If the file that is associated with the document asset does not open in the portal interface, clear the Internet Explorer cache as follows:
>
> 1. In Internet Explorer, go to the **Tools** menu.
> 2. Select **Internet Options**.
> 3. Under "Temporary Internet Files" click **Delete Files**.
> 4. Check **Delete All Offline Content**.
> 5. Click **OK**.

6. Edit the file.
7. When you are ready to save your changes, close the file, then click **Save** in the dialog box that is displayed. Save the file to your local machine (or to any network drive that you can access).

Upload the edited file

8. Upload the edited file to replace the older version.
   - If you expect to finish editing quickly, you can leave the "Inspect" form open. When you are ready to upload the edited file, do the following:
     a. At the top of the "Inspect" form, click the asset's **Edit** icon.
     b. Go to the "File" field, click **Browse**, and select your newly edited file.
     c. Click **Save Changes**.
   - If you expect editing to be a lengthy process, you can close the "Inspect" form. When you are ready to upload the edited file, do the following:
     a. Locate the document asset you want to update.
     b. Click the asset's **Inspect** icon.
     c. In the asset's "Inspect" form, go to the "File" field, click **Browse**, and select your newly edited file.
     d. Click **Save Changes**.

Moving Document Assets

You may find it necessary to re-arrange your document assets in the document hierarchy. For example, you may need to move a document asset from the asset type root folder to a sub-folder.

To move a document asset to a sub-folder

If you have a document asset in the asset type root folder, and you want to move it to a sub-folder, complete the steps below. You can also follow this procedure to move a document asset from one sub-folder to another sub-folder.

1. Find the document asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click the asset's **Edit** icon.

> **Note**
>
> You will not be able to edit this asset if one of the following holds:
>
> - The asset is checked out to another user.
> - You have no permission to edit the asset.
>
> The portal interface notifies you of each condition by displaying the message "Cannot perform this operation."

4. In the "Folder" field, click the folders icon ().
   - In Spark, this field is named **Spark Folder**.
   - In the CS portal interface, the name of this field depends on how your site developers named parent folders.
5. In the screen that opens, choose the desired parent folder for the asset and click the **Select** button.

   (If a list of folders is not displayed in the screen that opens, click the name of the asset type root folder to display this list).

   The portal interface returns you to the asset's "Edit" form, where your selection is displayed in the "Folder" field.
6. Click **Save Changes** to close the "Inspect" form.

   Your asset is now assigned to the folder of your choice.

To move a document asset from a sub-folder to the asset type root folder

If you have a document asset assigned to a sub-folder and you want to move it to the asset type root folder, complete the following steps.

1. Find the document asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.

3. In the asset's "Inspect" form, click the asset's **Edit** icon.

> **Note**
>
> You will not be able to edit this asset if one of the following holds:
>
> - The asset is checked out to another user.
> - You have no permission to edit the asset.
>
> The portal interface notifies you of each condition by displaying the message "Cannot perform this operation."

4. In the "Folder" field, click the folders icon () to display the path to the document asset.
   - In Spark, this field is always named **Spark Folder**.
   - In the CS portal interface, the name of this field depends on how your site developers named parent folders.
5. Do one of the following:
   - If you are using Spark, click **Spark Document**.
   - If you are using the CS portal interface, click the name of the asset type root folder.

   The portal interface returns you to the asset's "Inspect" form, where the "Folder" field displays no path to the asset.
6. Click **Save Changes**.

Your document asset is now moved to the asset type root folder.

Deleting Document Assets

To delete a document asset

1. Find the asset that you want to delete. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click the **Delete** icon.

   The portal interface displays one of the following:
   - A prompt asking you to confirm the deletion of this asset. Go to step 4.
   - A message indicating that the asset is associated with other assets. In the message is a list of links to the associated assets so you can remove the associations and try again. When you have removed all the associations, go to step 4.
4. Click **Delete This Item**.

   The asset is removed from the interface, and is no longer accessible (for example, the asset is no longer available for editing or for retrieval by searches).

Working with Folders

In the portal interface, folders are used much like folders in a true file management system, to organize document assets. This section shows you how to create folders, organize the folders in hierarchies or at the same level in the root folder, edit the folders, and delete the folders.

Creating Folders

This section shows you how to create folders in Spark and the CS portal interface. Document assets can be assigned to the folders, as necessary.

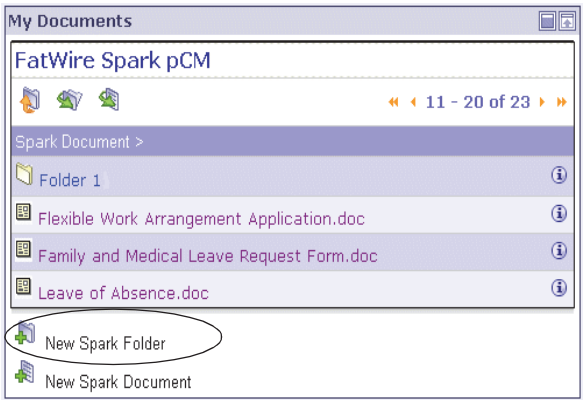
Before creating folders

1. If you are planning to create a hierarchy of folders in the site's document management system, first plan the hierarchy by drafting a sketch. Then, follow the steps below to create the folders one by one, starting with the topmost folder. Planning will help you avoid repeating steps or taking extra steps to create the hierarchy. When you have finished, keep the sketch for future reference.

   For organizational purposes, we recommend that hierarchies be no deeper than three levels.

To create a folder (Spark)

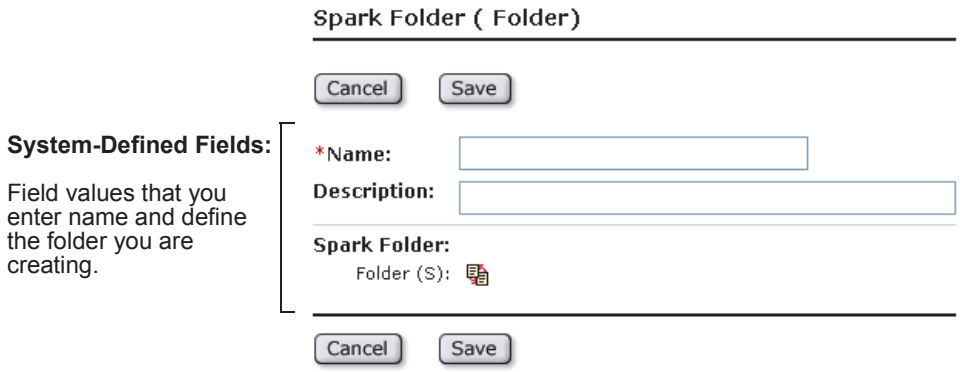
2. Maximize the portlet "My Documents."
3. Click the **Spark Document** folder. (If you do not see the **Spark Document** folder, click the site name displayed in the "My Documents" portlet.)
4. Click the **New Spark Folder** icon  at the bottom of the portlet.



Note

If you have the appropriate permissions, you can also create folders by using the "Create Content" portlet and clicking **New Spark Folder** in the "Name" column.

The “Spark Folder (Folder)” form is displayed.



5. Fill in the fields in the form. See Table 9 if you need field descriptions.

Table 9: Field descriptions for the ‘Spark Folder’ content-entry form

Field Name	Description
*Name	The name of the folder you are creating. The name that you enter will be used to identify the folder in the portlets.
Description	Description of the current folder.
Spark Folder	Used to create hierarchies of folders. Click this link if you want to select a parent folder for the folder you are creating. If you leave this field blank, the folder will be placed in the **Spark Document** root folder and displayed as a line item in the portlet “My Documents.”

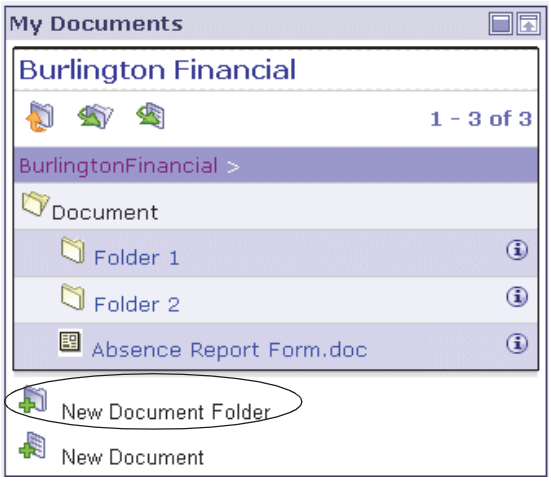
6. Click **Save** to save the folder and return to “My Documents.”
7. If you are creating a hierarchy, do the following:
   a. Repeat steps 4–6 of this procedure to create as many additional folders as necessary. In step 5, make sure to populate the “Folder” field by selecting the previously created folder.
   b. If you need to verify your folder hierarchy, see “Overview of the ‘My Documents’ Portlet” on page 52 for instructions on viewing the hierarchy.

To create a folder (CS)

1. Maximize the portlet “My Documents.”
2. Click the name of the asset type root folder of the asset type that you are creating a folder for. (If you do not see this folder, click the site name displayed in the “My Documents” portlet.)

3. Click the new folder icon for the folder you want to create (located at the bottom of the portlet). The name next to the icon depends on how your site developers named folders (you may see several new folder names to choose from).

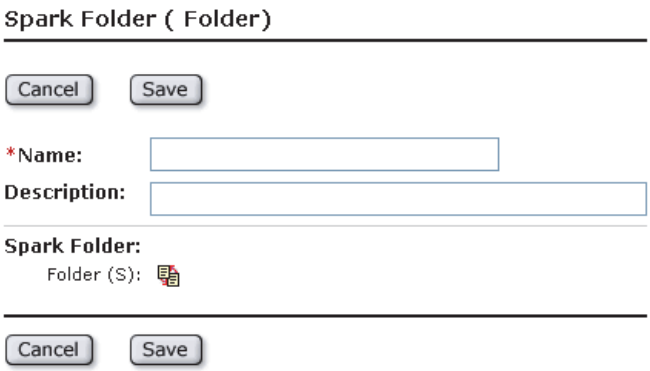
   In the example displayed in the following image, you would click the **New Document Folder** icon to create a new folder for the **Document** asset type.



Note

If you have the appropriate permissions, you can also create folders by using the "Create Content" portlet and clicking the **New** link in the "Name" column for the folder you want to create. The name of this link will vary depending on how your site developers named folders (you may see several new folder names to choose from).

The screen displays the content-entry form for the new folder. (Our example displays the "Spark Folder (Folder)" form.)



System-Defined Fields:

Field values that you enter name and define the folder you are creating.

4. Fill in the fields in the form.

See Table 10 for descriptions for the system-defined fields in the folder content-entry form. Your site developers can help you with custom fields, which are not described in this table.

Table 10: Field descriptions for the folder content-entry form

	Field Name	Description
System-defined fields	*Name	The name of the folder you are creating. The name that you enter will be used to identify the folder in the portlets.
	Description	Description of the current folder.
	Folder	Used to create hierarchies of folders. Click this link if you want to select a parent folder for the folder you are creating. The name of this field depends on how your site developers named parent folders. **Note**: If you leave this field blank, the folder will be placed in the asset type root folder.
Custom fields	Defined by administrator or site developers	These fields are created by your site developers as attributes that define the asset type, and prompt you for specific content. If you need information about these fields, see your site developers.

5. Click **Save** to save the folder and return to "My Documents."
6. If you are creating a hierarchy, do the following:
   a. Repeat steps 3–5 of this procedure to create as many additional folders as necessary. In step 4, make sure to populate the "Folder" field by selecting the previously created folder.
   b. If you need to verify your folder hierarchy, see "Working with 'My Documents'" on page 51 for instructions on viewing the hierarchy.

Editing Folders

You can edit a folder by renaming it or changing its description.

To edit a folder

1. Run a search on the folder you want to move. If you need instructions, see Chapter 7, "Searching for Assets."
2. Click the folder's **Inspect** icon.
3. In the folder's "Inspect" form, click the folder's **Edit** icon.
4. Make your changes, and click **Save Changes**.
5. The system refreshes the folder's "Inspect" form, confirming the changes. If you click **Cancel** instead, the "Inspect" form remains unchanged.

Moving Folders

You may find it necessary to re-arrange folders in the hierarchy (for example, you may need to move a folder from the asset type root folder to a sub-folder).

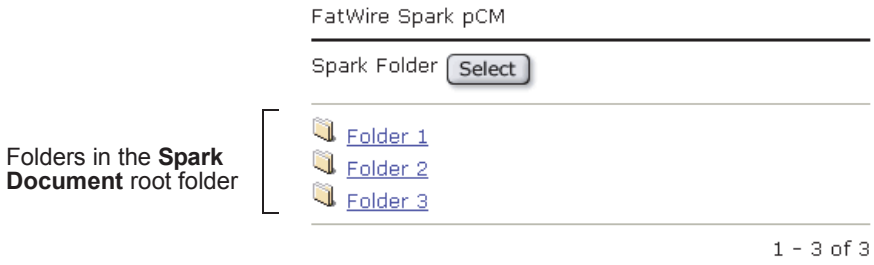
To move a folder to a sub-folder

If you have a folder in the asset type root folder, and you want to move it to a sub-folder, complete the steps below. You can also follow this procedure to move a folder from one sub-folder to another sub-folder.

1. Run a search on the folder you want to move. If you need instructions, see Chapter 7, "Searching for Assets."
2. Click the folder's **Inspect** icon.
3. In the folder's "Inspect" form, click the folder's **Edit** icon.
4. In the "Folder" field, click the folders icon ( ).
5. If the screen that opens displays a list of folders, proceed to step 6.

   If the screen that opens does not display a list of folders, do one of the following:

   - If you are using the CS portal interface, click the name of the asset type root folder to display the folders in the asset type root folder.
   - If you are using Spark, click **Spark Folder** (below the "FatWire Spark pCM" label) to display the folders in the **Spark Document** root folder.



6. Select a parent folder for the folder you are moving.
7. Click **Select**.
8. Click **Save Changes**.

Your folder has now been moved to a sub-folder.

To move a folder to the asset type root folder

If you have a folder assigned to a sub-folder and you want to move it to the asset type root folder, complete the following steps.

1. Run a search on the folder you want to move. If you need instructions, see Chapter 7, "Searching for Assets."
2. Click the folder's **Inspect** icon.
3. In the folder's "Inspect" form, click the folder's **Edit** icon.

4. In the "Folder" field, click the folders icon ().
5. Do one of the following:
   - If you are using the CS portal interface, click the name of the asset type root folder.
   - If you are using Spark, click **Spark Folder** (below the "FatWire Spark pCM" label).
6. Click **Select**.
7. Click **Save Changes**.

   Your folder is now assigned to the asset type root folder.

Deleting Folders

To delete a folder

1. Run a search on the folder that you want to delete. If you need instructions, see Chapter 7, "Searching for Assets."
2. Click the folder's **Inspect** icon.
3. At the top of the "Inspect" form, click the folder's **Delete** icon.

   The portal interface displays one of the following:
   - A prompt asking you to confirm the deletion of this folder. Go to step 4.
   - A message indicating that the folder is associated to other folders or to document assets. In the message is a list of links to the associated assets so you can remove the associations and try again. When you have removed all the associations, go to step 4.
4. Click **Delete This Item**.

   The folder is removed from the interface, and is no longer accessible (for example, the folder is no longer available for editing or for retrieval by searches).

Chapter 6

Creating New Assets by Copying

A quick way to create new assets is to use the copy function. This function allows you to replicate existing assets and modify the replicates as necessary.

The copy function is available for both structured content assets and document assets. However, like many other functions, it is permissions based. In order to copy document assets, you must have permissions to document assets. Similarly, to copy structured content assets you must have permissions to structured content assets. (For information about structured content assets and document assets, see "Structured Content Assets vs. Document Assets" on page 19.)

This chapter shows you how to create new assets simply by copying existing assets and making any necessary modifications.

Copying Assets

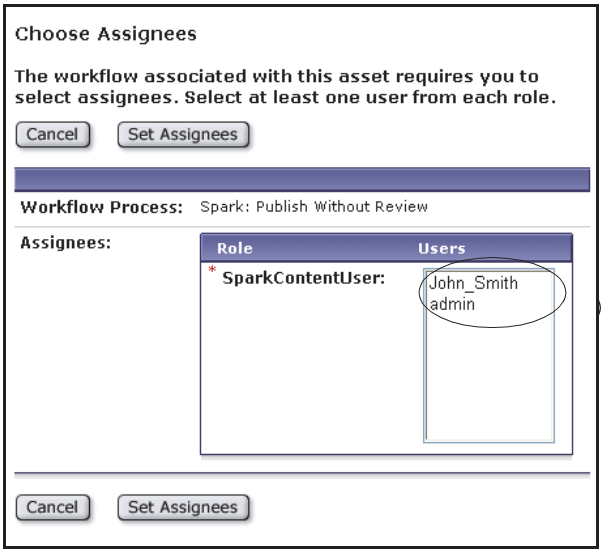
You can create a new asset by copying an existing asset and modifying the copy as necessary. You can copy an asset even if it is checked out by another user.

To copy an asset

1. Find the asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Copy via "New *Asset Type*."**

> **Note**
>
> If **Copy via "New *Asset Type*"** is not listed as an option, you do not have permission to copy the asset. Stop here. If you have questions about your permissions, contact your CS or Spark administrator.

4. If the "Choose Assignees" screen (at the right) is not displayed, it means that your asset is either not associated with a workflow or it is associated with a workflow that does not require choosing assignees. Skip to step 5 of this procedure. Otherwise, continue with this step.



   In the "Choose Assignees" screen, you need to set the assignees—users to whom you are assigning the asset. Any of these users can complete the next step in the workflow process. (If you need information about workflow, see Chapter 9, "Collaborating in Workflow.")

   a. In the "Assignees" panel, go to the "Users" list box and select the assignees.

      To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user.

   b. Click **Set Assignees**.

5. Fill in the fields of the content-entry form that is displayed. The content-entry form depends on whether you have selected to create a structured content asset, document asset, or folder. If you need field descriptions, refer to the tables listed below. Your site developers or Spark administrator can help you with custom fields, which are not described in these tables.
   - For structured content assets, see Table 6, “Field descriptions for the structured content asset content-entry form” on page 44.
   - For document assets, see Table 8, “Field descriptions for the document asset content-entry form” on page 65.
   - For folders, see Table 10, “Field descriptions for the folder content-entry form” on page 75.
6. Click **Save**.
7. If you selected yourself in the “Choose Assignees” screen, your asset is displayed in your “Content Assignments” portlet. If the asset is a document asset, it is also displayed in your “Document Assignments” portlet.

   Because the asset is assigned to you, you can now complete the next step in the workflow process for this asset. If you need instructions on using the “Content Assignments” or “Document Assignments” portlet to finish your assignment, see “Finishing Assignments” on page 105.
8. The portal interface lists your newly created asset in the “Content History” portlet. If the asset is a document asset, it is also listed in the “Document History” portlet. When you end your session, the lists in these two portlets are deleted.

   If you want to log your new asset in a permanent list for easy access, save it to your active list, which is displayed in the “Active Content” and “Active Documents” portlets. You can remove the asset from the active list, as necessary. For instructions, see Chapter 8, “Logging Assets.”

Chapter 7

Searching for Assets

The portal interface supports two kinds of searches: simple and advanced.

- In simple searches, assets are located first by type and then by name.
- Advanced searches are more granular. In advanced searches, assets are located by additional data: description, workflow status, modification dates, editor, and attribute values.

Two portlets allow you to search for assets. “Search Content” allows you to search both structured content assets and document assets, but “Search Documents” allows you to search only document assets.

In both simple and advanced searches, search results can be saved to the “Active Content” portlet and the “Active Documents” portlet.

This chapter shows you how to execute searches, save the search criteria, and save the search results. It contains the following sections:

- Search Basics
- Search Tips
- Running Searches

Search Basics

Here are some general characteristics of searches:

- As previously mentioned, the portal interface supports two kinds of searches: simple and advanced.
- Simple and advanced searches enable you to do the following:
  - Locate assets by asset type, at one type of asset per search.
  - Execute text string searches, which return all assets (of a given type) containing the specified search string. Information about text string searches is given in "Search Tips."
  - Obtain the total number of instances of the specified asset type in the site.
  - Sort results by one of the following options: asset name, description, created by, created date, updated by, or updated date.
  - Save search results to the portlet "Active Content." (Document assets are also saved to the portlet "Active Documents.")

Note that un-refined searches tax system capabilities such that the system truncates search results at 1,000 assets. That is, clicking the **Search** button without specifying a value for a search parameter returns up to 1,000 instances of the selected asset type. If you expect search results to exceed 1,000 assets, you must refine your search criteria.

Search Tips

When running searches on text strings, note the following:

- Phrases are treated as a series of independent words delimited by space characters. All records matching all the words exactly as written are retrieved.
- The portal interface search mechanism is not case sensitive.
- Do not use quotation marks in the search string. Quotation marks are treated as characters. For example, a search on "John Doe" finds only John Doe in quotation marks.
- Commas are used strictly for concatenation. They are not interpreted as characters. For example, a search on *logo, banner* finds occurrences of the word *logo* **and** occurrences of the word *banner*.
- The percent sign (%) can be used as a wildcard in your search criteria.

Note

By default, both the CS portal interface and Spark use a database SQL search mechanism.

The CS portal interface can be set up to use third-party search engines; for more information, contact your CS administrator. Spark does not support third-party search engines.

Running Searches

This section shows you how to run simple and advanced asset searches, using both the "Search Content" portlet and the "Search Documents" portlet.

The "Search Content" portlet allows you to search both structured content assets and document assets, but the "Search Documents" portlet allows you to search only document assets. Your access to these portlets depends on the permissions granted to you by your administrator.

Running a Simple Search

In a simple search, assets are located by type, name, description and the user who created or modified the assets. If you need granularity in your search, see "Running Advanced Searches" on page 88.

To run a simple search

1. Maximize either "Search Content" or "Search Documents." Remember that "Search Documents" allows you to search only document assets.

   In this procedure we use the "Search Content" portlet.

2. In the "Search" form, fill in the fields with your search criteria. If you need field definitions, see Table 11, "Field descriptions for the 'Simple Search' form" on page 86.

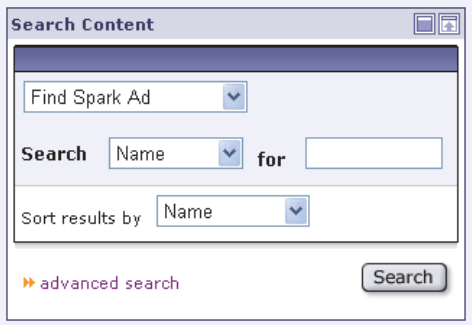
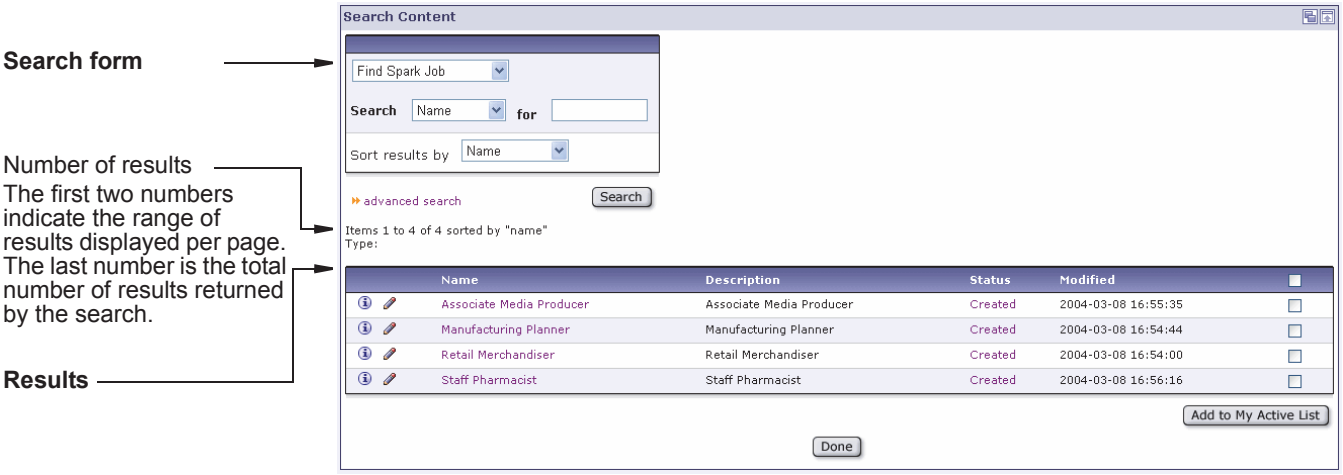


Table 11: Field descriptions for the 'Simple Search' form

Field Name	Description
Find *Asset Type*	Type of asset that you want to search for. In Spark, your options are the following: • **Spark Document** (system default) • **Spark Folder** (system default) • *Custom Asset Types*: All other list items are custom asset types, created for your installation by your Spark administrator. In the CS portal interface, the list items will vary depending on the custom asset types created by the developers. Valid entries: An option in the drop-down list.
Search	The search parameter, selected from the drop-down list. Valid entries: An option in the drop-down list.
for	A value for the search parameter that you selected in the previous field. Valid entries: A search string. For more information, see "Search Tips" on page 84. Note: If you leave this field blank, your search will be non-selective. The portal interface will return all instances of the asset type, up to a maximum of 1,000. If you expect your search results to exceed 1,000, refine your search criteria to avoid taxing system resources and to obtain a complete list of results.
Sort results by	The value by which to sort the search results. Valid entries: An option in the drop-down list.

3. Click **Search** to execute the search.

The portal interface returns the search results—a list of assets that satisfy the criteria you specified in the steps above. (The search results are displayed below the search form.)



To scroll through the simple search results

4. Click the **Previous** or **Next** button (for example, ◂ Previous 20 | Next 15 ▸) in the upper right-hand corner directly above the results list.

> **Note**
>
> The **Previous | Next** buttons are displayed only for lists containing more than ten items.

To save simple search results

You can save your search results by logging them to your active list for future reference.

Structured content assets will be logged in the "Active Content" portlet. Document assets will be logged in both the "Active Content" and "Active Documents" portlets.

5. To save the search results, do the following:
   a. Scroll to the page containing the assets you want to log (use the **Next** or **Previous** button, as necessary).
   b. Select the checkbox of each asset that you want to log.
   c. Click **Add to My Active List**.

   The portal interface re-displays the portlet from which you ran the search (notice that the assets that you logged no longer display checkboxes).
6. To add more assets, repeat steps 2 through 5 (changing the search criteria as necessary) until you have logged all the assets of your choice.
7. Once you have completed your search, click **Done**.

Running Advanced Searches

In an advanced search, assets can be located by a large variety of data:

- Asset type
- Asset name
- Description
- Modification dates (modified after, modified before)
- Editor (modified by)
- Attribute values

Like simple searches, advanced searches allow you to save search results.

To run an advanced search

1. Maximize either “Search Content” or “Search Documents.” Remember that “Search Documents” allows you to search only document assets.
2. From the “Type” field, select an asset type.
3. Click the **advanced search** link.
4. In the “Advanced Search” form, fill in the fields, as necessary. If you need field definitions, see Table 12, “Field descriptions for the ‘Advanced Search’ form” on page 89.

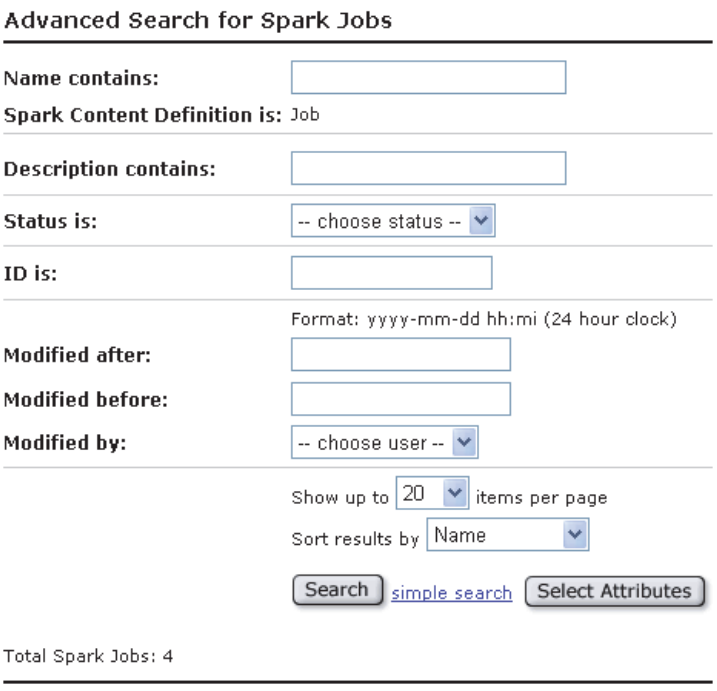


Table 12: Field descriptions for the 'Advanced Search' form

Field Name	Description
Name contains	Words or phrases contained in the name of the asset type you are searching for. Valid entries: See "Search Tips" on page 84.
Content / Document Definition	Information-only field. Confirms the asset type that you selected to search for.
Description contains	Words or phrases contained in the description of the asset you are searching for. Valid entries: See "Search Tips" on page 84.
Status is	The status of the asset you are searching for (e.g., created).
ID is	A unique, system-generated number identifying the asset.
Modified after	The date after which assets of the selected type were modified. Valid entries: A date in the format that is specified above this field.
Modified before	The date before which assets of the selected type were modified. Valid entries: A date in the format that is specified above the "Modified after" field.
Modified by	The user who modified assets of the selected type. Valid entries: An option in the drop-down list.
Show up to	The number of search results to display per page.
Sort results by	The value by which to sort the results. Valid entries: An option in the drop-down list.

5. Do one of the following:
   - Click **Select Attributes** (to search by attributes, or their values) and go to step 5 on page 91 to continue the search.
   - Click **Search** to execute the search.

The portal interface returns the search results—a list of assets that satisfy the criteria you specified in the steps above.

To scroll through the advanced search results

6. Click the **Previous** or **Next** button (for example, ◂ Previous 20 | Next 15 ▸) in the upper right-hand corner directly above the results list.

> **Note**
>
> The **Previous | Next** buttons are displayed only for lists containing more than ten items.

To save advanced search results

You can save your search results by logging them to your active list. Once the results are logged, you do not have to execute the same search again. Structured content assets are logged in the "Active Content" portlet. Document assets are logged in both the "Active Content" and "Active Documents" portlets.

7. To save the search results, do the following:
   a. Scroll to the page containing the assets you want to log (use the **Next** or **Previous** button, as necessary).
   b. Select the checkbox of each asset that you want to log.
   c. Click **Add to My Active List**.

      The portal interface re-displays the portlet from which you ran the search. (Notice that the assets that you placed in the active list no longer display checkboxes.)
8. To log more items, repeat steps 2 through 7 (changing the search criteria as necessary) until you have logged all the assets of your choice.
9. Click **Done** to exit the search screen.

Searching for Assets by Attribute Values

Note

The terms “attributes” and “fields” are used interchangeably in this guide, as the distinction is not important for content providers. For interested readers, “attributes” in the context of the content provider’s function are the names of the fields that prompt you for publishable content.

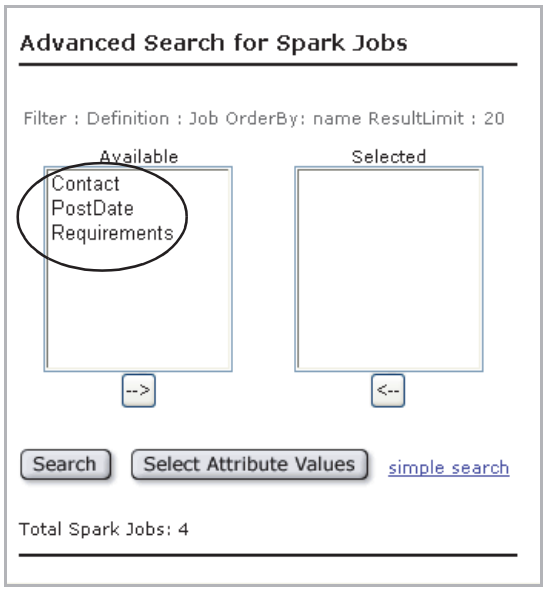
In advanced searches, the portal interface enables you to search assets by the values of specific attributes. For example, if you are using the Spark sample site, your interface displays an asset type called “Job Ads.” All job ads have a “Requirements” field (or attribute). If you need to isolate job ads with a certain requirement, you can set up a search on the “Requirements” attribute and then specify a value on which to search for that attribute. The portal interface will return all job ads whose content in the “Requirements” field matches your value.

To search for assets by attribute values

1. Maximize either “Search Content” or “Search Documents.” Remember that “Search Documents” allows you to search only document assets.
2. From the “Type” field, select an asset type.
3. Click the **advanced search** link.
4. In the “Advanced Search” form, click **Select Attributes**.
5. In the “Select Attributes” form, choose attributes for the search by moving them from the “Available” list box to the “Selected” list box.

   To move the attributes, select them in the “Available” list box, and click the arrow button to move them to the “Selected” list box.

   Note: To select multiple attributes in a block, **Shift-click** the extremes of the block. To select non-adjacent assets, **Ctrl-click** the assets.



6. Click **Select Attribute Values**.
7. Enter attribute values as the search criteria.
8. Click **Search**.

   The portal interface returns the assets whose attributes have the values you specified.
9. To save the search results, follow the steps in “To save advanced search results” on page 90.

Chapter 8

Logging Assets

When you need quick and easy access to certain assets, you can log them to an active list, using the “Active Content” or “Active Documents” portlet.

The list is similar to the list of favorites (or bookmarks) that you create in your Web browser.

You create an active list for your own reasons (for example, you frequently refer to certain assets and prefer to keep them within easy reach). When the assets are no longer of interest, you can remove them from the list.

Note that an active list is empty until you explicitly add assets to it. Assets that you add to the list remain there until you explicitly remove them from the list (or until they are deleted from the system).

Keeping an active list promotes your efficiency, as it prevents you from repeatedly searching for the assets that you use most often.

This chapter contains the following sections:

- ‘Active Content’ and ‘Active Documents’ Portlets
- Adding Assets to the Active List
- Removing Assets from the Active List

'Active Content' and 'Active Documents' Portlets

The "Active Content" and "Active Documents" portlets differ in one way: the "Active Content" portlet is used to store an active list with both structured content assets and document assets, whereas the "Active Documents" portlet is used to store an active list with only document assets.

Note

Your access to the "Active Content" and "Active Document" portlets depends on the permissions granted to you by your administrator.

Adding Assets to the Active List

You can add assets to the active list in one of two ways:

- In batches, by using a search routine
- One asset at a time, from the asset's "Inspect" form

Both methods are shown below.

To add assets in batches to the active list

1. Run a search on the assets that you want to add to your active list. For instructions, see Chapter 7, "Searching for Assets."
2. In the search results list, navigate to the page that lists the assets you need.

Note

If your search results list spans multiple pages, use the **Previous | Next** buttons (in the upper right-hand corner) to navigate to the assets you need.

3. Choose the assets you want to add by selecting their checkboxes.

> **Note**
>
> To select all assets at once, select the topmost checkbox (next to the "Modified" column).

4. Click the **Add to My Active List** button, located below the search results list.

   A message confirms that the assets were successfully added. The search results list is updated, and the checkboxes disappear for the assets that were selected.

   Structured content assets are logged in the "Active Content" portlet. Document assets are logged in both the "Active Content" and "Active Documents" portlets.

5. If you need to add other assets, repeat steps 2 through 4.
6. Click **Done** to close the search results screen and return to your workspace.

To add an asset to the active list from the 'Inspect' form

1. Find the asset that you want to add to your active list. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click the text **Add to My Active List** (located to the right of the **more...** drop-down list at the top of the form).
4. To confirm that the asset has been added, look for the asset in the "Active Content" portlet. (If it is a document asset, it is also displayed in the "Active Documents" portlet.)

Removing Assets from the Active List

When assets in the active list are no longer of prime importance to you, you can remove them from the active list. Removing assets from the active list removes them from the "Active Content" and "Active Documents" portlets only, not from the Spark or Content Server database.

Note

When you remove a document asset from either the "Active Content" portlet or the "Active Documents" portlet, the asset is also removed from the other portlet (for example, when you remove a document asset from the "Active Documents" portlet, the asset is also removed from the "Active Content" portlet).

To remove assets from the active list

1. Maximize the portlet "Active Content." (If you are removing document assets, you can also use the "Active Documents" portlet.)
2. Navigate to the page that lists the assets you need.

Note

If your active list spans multiple pages, use the **Previous | Next** buttons (in the lower left-hand corner) to navigate to the assets you need.

3. Select the assets that you want to remove by clicking their checkboxes.
4. Click the **Remove** button, below the list.

   The list immediately refreshes, showing the results of the removal.
5. If you need to remove additional assets from the active list, repeat steps 2 through 4.

Chapter 9

Collaborating in Workflow

Workflows are collaborative processes that content providers use to first assure the quality of the work they plan to publish, and then to approve the asset for publication.

This chapter provides an overview of workflow in the portal interface. It also shows you how to participate in the workflows and make decisions about workflow processes (for example, assigning workflows to assets that you believe to require a workflow).

This chapter contains the following sections:

- Workflow in the Portal Interface
- Overview of Workflow in Spark
- Finishing Assignments
- Making Decisions About the Workflow Process

Workflow in the Portal Interface

Before an asset can be delivered to the display portal, it may need to be reviewed and approved. If so, review and approval are implemented by means of workflow—a collaborative process in which the asset is passed through a sequence of operations that start with the asset's creation, continue with its review, and culminate in approval of the asset for publication. The workflow is executed by qualified collaborators who contribute the content of the asset, review the asset, or approve (or reject) the asset to each other for confirmation (or revision) until they are satisfied with the resulting quality. A deciding collaborator then approves the asset for publication.

This collaborative process is the same for both Content Server and Spark. Spark supports only three workflow processes, all pre-defined; these workflow processes cannot be modified. The CS portal interface supports any workflows created by a CS administrator (workflows are created in the Content Server standard interface). The CS portal interface also supports all of the workflows installed with sample sites, including the Spark sample site.

Several workflow options are available in the CS portal interface but not in Spark (these options are explained in this chapter).

The workflow chapter in the *Content Server User's Guide* provides a detailed overview of workflow in Content Server. For an overview of workflow in Spark, proceed to the next section in this chapter. The Spark workflow overview is useful to Content Server users as well, as the Spark workflows are also available in the CS portal interface in the Spark sample site.

This chapter also provides instructions on how to use Spark and the CS portal interface to perform workflow-related tasks.

Overview of Workflow in Spark

This section provides an overview of workflow in Spark. Developing an understanding of how workflows operate will help you use Spark's workflow features in your daily activities.

Spark Workflow Basics

As mentioned previously, Spark supports three pre-defined workflows, which cannot be modified. Each of the Spark workflows enlists only one participating role. Users given this role are the workflow **participants**, the potential candidates for completing workflow tasks. However, not all users in a role will actually participate in workflow tasks. As part of each step in all Spark workflows, the user completing a step must select the user (or users) who will receive the assignment to complete the next step in the workflow process. These selected users are referred to as **assignees**.

At a minimum, a Spark workflow must have two states. The first state allows users to create assets and approve them to the second state. The second state allows users to reject the assets back to the source state for updates and other revisions.

To enable shuttling of assets between states, a workflow provides each of its participants with the options to approve assets to subsequent states, or reject assets to previous states. To prevent competition for control of an asset, Spark provides both a manual and an automatic checkin/checkout mechanism, equivalent to write protection. For example,

when a content asset is created, it is automatically checked out to the creator, so that no other user can modify the asset while it is work in progress. When the work is complete, the creator of the asset can check the asset back in for others to modify as necessary. The next user to check out the asset gains control.

Once an asset is approved to the final state, it remains in the final state to await its publication to the delivery system and deployment to the portal. Publishing and deployment are typically executed by the Spark administrator, or by a user with administrative rights. Publishing and deployment also have specific meanings in Spark.

- "Publish" means moving assets from the content management database to the delivery system database (as shown in Figure 2, in Chapter 1). Here, the published assets are collected for deployment to the display portal.
- "Deploy" means to deliver published assets to the display portal. Delivery is accomplished by JSPs, which are coded by developers to the portal designer's specifications in order to deliver the right information with the right "look and feel."

  The JSP code draws the content of the published assets from the delivery system database, formats the content, lays out the content, and delivers the content to the portal.

Assigning workflow

Assigning workflow is discretionary.

- If the review of certain assets is expected to be a routine operation, the associated asset type is typically assigned a workflow by the administrator. When an asset type is assigned a workflow, all assets of that type are automatically entered into the workflow the moment they are created.

  For those instances when a workflow proves to be unnecessary, the workflow can be canceled or replaced with a different workflow by anyone who has the right permissions.
- When review of certain assets is expected to be a rare operation, the Spark administrator typically does not assign workflow to the associated asset type. No assets of that type are entered into workflow when they are created. However, a content provider might determine that an exception needs to be made. For example, when a particular asset requires review, the content provider can assign a workflow to that asset (as long as the content provider is authorized to do so).

To summarize, two types of workflow assignments are possible:

- Spark administrators can assign workflow to asset types. Assets of that type are automatically entered into workflow when the assets are created.
- Content providers can assign workflow to individual assets, as long as they have the right permissions.

Note

Assets in workflow can be removed from workflow by participants with the right permissions.

By default, workflows in Spark are configured to:

- Log your assignments in the portlet “Content Assignments.” (Document asset assignments are also logged in the “Document Assignments” portlet.)
- Trigger and send e-mail messages to workflow assignees in order to notify them that assets are assigned to them and to remind them that a deadline is approaching or has been missed.

Supported Workflows

Spark defines three workflow processes:

- For structured content assets, Spark defines:
  - A two-state workflow process called “Publish Without Review” (Figure 8)
  - A three-state workflow process called “Publish With Review” (Figure 9)

  These workflows enlist only the SparkContentUser as a participating role.
- For document assets, Spark defines a two-state workflow called “Publish Documents Without Review.”

  This workflow enlists only the SparkDocumentUser as a participating role.

Note

Spark does not allow anyone to either create workflows or modify its default workflows.

Throughout this chapter, it is important to bear in mind that any Spark workflow state or step named “Publish” means “approve for publish.” Publishing itself is executed by the Spark administrator or a user with administrative rights, as previously explained.

Workflow for Structured Content Assets

The two workflows shown on page 101 differ in their types of components—states and steps. “Publish Without Review” has two states and three steps. “Publish With Review” has three states and five steps. For information about states and steps, see “Workflow Components” on page 102.

When to Use the Two-State Workflow

The 2-state workflow benefits fast-paced operations. Rather than wait for an intermediary’s approval, workflow participants can approve their own content from the “Create” state to the “Publish” state independently of each other.

When to Use the Three-State Workflow

The purpose of a 3-state workflow is to allow for division of labor, as in quality assurance operations. Specialized roles can be selected to handle assets in a certain way. For example, users in some roles would be experts at creating the assets, while users in other roles would be experts in reviewing or somehow testing the assets.

The 3-state workflow interposes a review state between the “Create” state and the “Publish” state. Because content creators are denied access to the “Publish” state, they are prevented from approving assets for publication on their own initiative. Instead, they

approve their assets to the middle stage where reviewers examine the assets. If an asset is not publication-ready, a reviewer can modify the asset himself or reject it back to the source for revision. Otherwise, the reviewer approves the asset to the final state for publication.

In general, the 3-state workflow benefits the more sensitive operations, in which content must be thoroughly reviewed for accuracy and similar qualities. Workflow participants engage in formal reviews, where content and commentary are exchanged in a structured manner.

Figure 8: Workflow 'Publish Without Review' (for structured content assets)

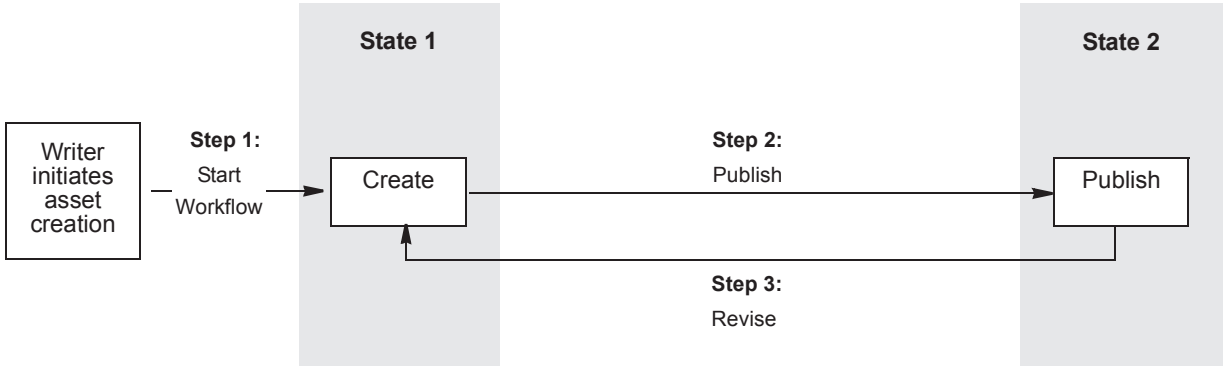


Figure 9: Workflow 'Publish With Review' (for structured content assets)

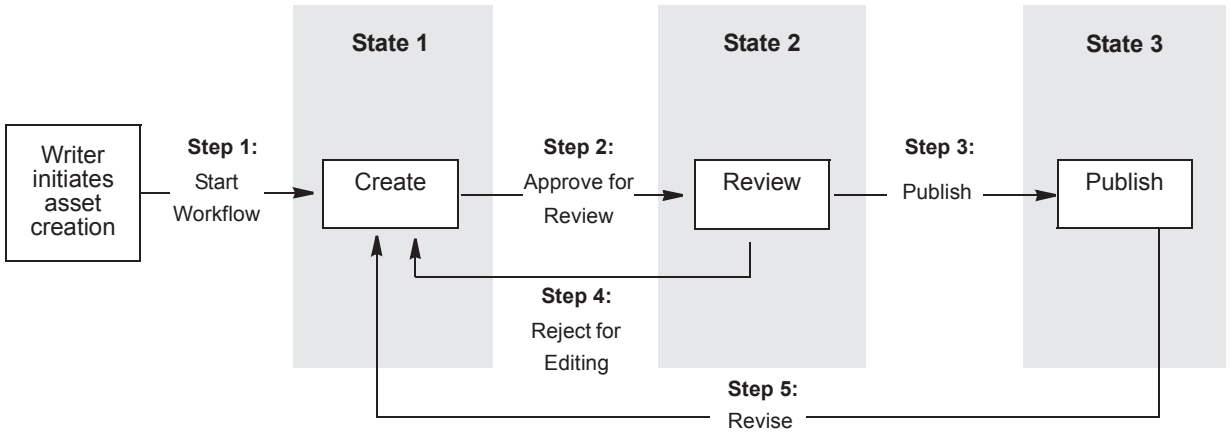


Table 13: Workflows for structured content assets

	Publish Without Review		Publish With Review		
States	1. Create	2. Publish	1. Create	2. Review	3. Publish
Default Roles	SparkContentUser				
Steps: 1. Start Workflow is the initial step for all workflows.	2. Publish	3. Revise	2. Approve for Review	3. Publish 4. Reject for Editing	5. Revise
Actions	Spark sends e-mail notices, triggered by the completion of a step, to notify assignees of their assignments.				

Workflow for Document Assets

The "Publish Document Without Review" workflow is identical to the one shown in Figure 8, with one exception: the participant role is SparkDocumentUser rather than SparkContentUser. Table 14 summarizes the components of "Publish Document Without Review."

Table 14: Workflow for document assets

	Publish Document Without Review	
States	1. Create	2. Publish
Default Roles	SparkDocumentUser	
Steps: 1. Start Workflow is the initial step for all workflows.	2. Publish	3.Revise
Actions	Spark sends e-mail notices, triggered by the completion of a step, to notify assignees of their assignments.	

Workflow Components

Workflow components—states, steps, and actions—are described below, using Figure 9 as a model.

States are progress points in a workflow. A state defines what task(s), such as edit, must be accomplished on assets in that state (for example, edit the assets). For example, the workflow in Figure 9 is a three-state workflow used for structured content assets.

- State 1 (named "Create") defines *asset creation* as the task to be accomplished.
- State 2 (named "Review") defines *editorial review* as the task to be accomplished.
- State 3 (named "Publish") defines *approve for publication* as the task to be accomplished.

Steps are decisions that workflow participants make to drive the asset from one state to another. Steps connect states in a specific order and direction.

As part of the steps in Spark workflows, you are required to select assignees from the users in the participant role. One of these assignees will complete the next task in the workflow process. Note that if you select multiple users as assignees, only one user needs to complete the task. The user's task is called an **assignment**.

For example, in Figure 9:

- Step 1, Start Workflow, is a step that occurs automatically when an assignee creates and saves an asset with a pre-assigned workflow. "Start Workflow" places the asset in State 1 (Create) and therefore makes it known to other content providers that the workflow has begun.

Note

The "Start Workflow" step is implemented in all Spark workflows as a default that initiates the workflows.

- Step 2, Approve for Review, is a step that an assignee takes to drive the asset forward to State 2, Review. (Step 2 connects State 1 to State 2 in the forward direction.)
- Step 3, Publish, is a step that an assignee takes to drive the asset forward to State 3, Publish. (Step 3 connects State 2 to State 3 in the forward direction.)
- Step 4, Reject for Editing, is a step that an assignee takes to drive the asset back from State 2 to State 1 for revision. (Step 4 connects State 2 to State 1 in the backward direction.)
- Step 5, Revise, is a step that an assignee takes to drive the asset back from State 3 to State 1 for revision. (Step 5 connects State 3 to State 1 in the backward direction.)

An **action** is an event that is triggered in one of three ways:

- A step invokes it.
- A deadline triggers it.
- A workflow situation (such as a deadlock) triggers it.

Spark workflows are configured such that when a step is completed, Spark takes the action of sending e-mail notices to the assignees selected to complete the next step in the workflow process. For example, in the "Publish With Review" workflow, when Step 2, Approve for Review, completes executing, Spark sends e-mail notices to the appropriate workflow assignees, informing them of the asset they have been assigned to review. Only one of the assignees must complete the assignment in order for the workflow to continue.

Note

By default, Spark logs your assignments in your "Content Assignments" portlet. Spark also logs document asset assignments in the "Document Assignments" portlet.

How Workflows Operate

To illustrate how workflows operate, we use Spark's three-state workflow, "Publish With Review," shown in Figure 9.

The workflow operates as follows:

1. When an authorized user creates and saves an asset with a pre-assigned workflow, that user automatically invokes the first step, Start Workflow.

   In response, Spark does the following:

   a. Places the asset into State 1.
   b. Assigns the asset to the assignees who were chosen (from the SparkContentUser role) by the user who invoked the first step, Start Workflow.
   c. Logs the asset as an assignment in each assignee's "Content Assignments" portlet.
   d. E-mails notices of assignment to the assignees, thereby, starting the workflow.

   Note

   During its workflow, an asset is not electronically transferred from one state to the next. Only permission to the asset is transferred. The asset itself remains in its original location in the database throughout the workflow and throughout its lifetime in Spark.

2. To continue the workflow, an assignee who was chosen in step 1 completes the required task, checks the asset into the database, and approves the asset to State 2 by taking Step 2, Approve for Review.

   In response, Spark does the following:

   a. Places the asset into State 2.
   b. Assigns the asset to the assignees chosen (from the SparkContentUser role) by the user who took Step 2, Approve for Review.
   c. Logs the asset as an assignment in each assignee's "Content Assignments" portlet,
   d. E-mails notices of assignment to the assignees.

   Note

   When an asset arrives in a given state, it becomes an assignment that any user who is assigned to perform the task in that state can complete and drive to the next state.

3. An assignee in State 2 can take one of the following steps:

   - Approve the asset for publication by taking Step 3, Publish. Spark responds by approving the asset to State 3.
   - Reject the asset to State 1 by taking Step 4, Reject for Editing. Spark responds by returning control of the asset to State 1 for review and revision.

In our example workflow, the asset can be shuttled between States 1 and 2, and States 1 and 3 for ongoing reviews. (The asset cannot be rejected from State 3 to State 2.)

Finishing Assignments

Finishing assignments is a critical part of any job—especially in the formal setting of a workflow, where deadlines and collaborators demand quick action. An **assignment** is a task associated with the asset that an assignee is working on (or is supposed to be working on). An assignment is the result of a step that was taken in a workflow process. An asset is logged to your assignment list if you have been selected as an assignee to complete the next step in the workflow process. You also receive e-mail notices of assignment.

In Content Server and Spark, "finishing an assignment" refers to the steps that you must take ***after*** you have completed the required work on an asset (for example, editing the asset) that has been assigned to you as the result of a workflow process. "Finishing an assignment" means notifying the system and the assignees that you are done, so the asset can continue to move through the workflow process. Finishing an assignment is equivalent to:

1. Taking a step that drives the asset to the next state in the workflow,
2. selecting assignees to work on the asset (unless the asset is in its penultimate state and ready for publication), and
3. checking the asset into the database, to give other users access to the asset.

The portal interface makes it easy for you to find your assignments and finish them. Using the portlets "Content Assignments" and "Document Assignments," the portal interface keeps a running list of your assignments, and provides you with the controls you need in order to finish the assignments.

Note

In this chapter, we explain how to finish assignments using both the "Content Assignments" portlet and the "Document Assignments" portlet. The "Content Assignments" portlet displays all of your assignments. The "Document Assignments" portlet displays only your document asset assignments.

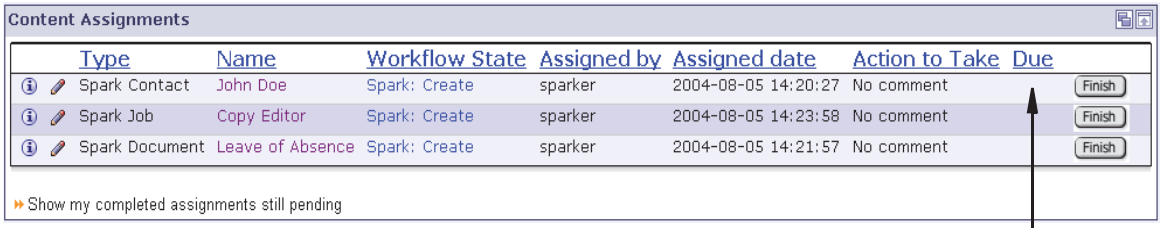
Your access to these portlets depends on the permissions granted to you by your administrator.

Complete the following steps to learn about using the portal interface to finish your assignments:

1. Maximize the "Content Assignments" or the "Document Assignments" portlet to full-screen size to display all the controls that are available to you. Remember that the "Document Assignments" portlet displays only your assigned document assets.

   In this procedure we use the "Content Assignments" portlet.

The portal interface displays a list of all the assets that are assigned to you. Each asset is identified by its name, state, the assigner, the assignment date, and optionally, the actions that need to be taken in order for you to complete work on the asset.



Color/Symbol	Status of Assignment
Black	Due within the specified time
Red	Due within 24 hours
Bold Red with plus sign (+)	Overdue after the time that is displayed

Values in the **Due** column are displayed in color and with symbols (shown in the table on the left) to indicate the status of each assignment.

2. Select the asset that you want to work with by clicking its name and complete the recommended action, as well as any other work that you feel is necessary.

> **Note**
>
> When you try to open the asset you might see the message "Cannot finish assignment." The message also explains why you cannot finish the assignment and what steps you must take.
>
> Generally, an assignment cannot be finished because the asset is checked out by another user. The portal interface identifies the user so that you can contact the individual.

3. When you are satisfied with the work you have done in step 2, return to "Content Assignments" or "Document Assignments" and click the asset's **Finish** button.

   The portal interface displays the form "Finish My Assignment."

4. Continue with step 3 on page 110 to finish the assignment.

Making Decisions About the Workflow Process

When it is your turn to participate in a workflow, you need to decide how you will handle your assignments and information related to the assignments. The portal interface presents you with a number of options. You can:

- Finish your assignment
- Set an assignment deadline
- Remove the asset from workflow
- Assign the asset a workflow
- Show the list of participants (Content Server only)
- Set participants (Content Server only)
- Set a process deadline (Content Server only)
- Delegate an assignment (Content Server only)
- Abstain from voting (Content Server only)

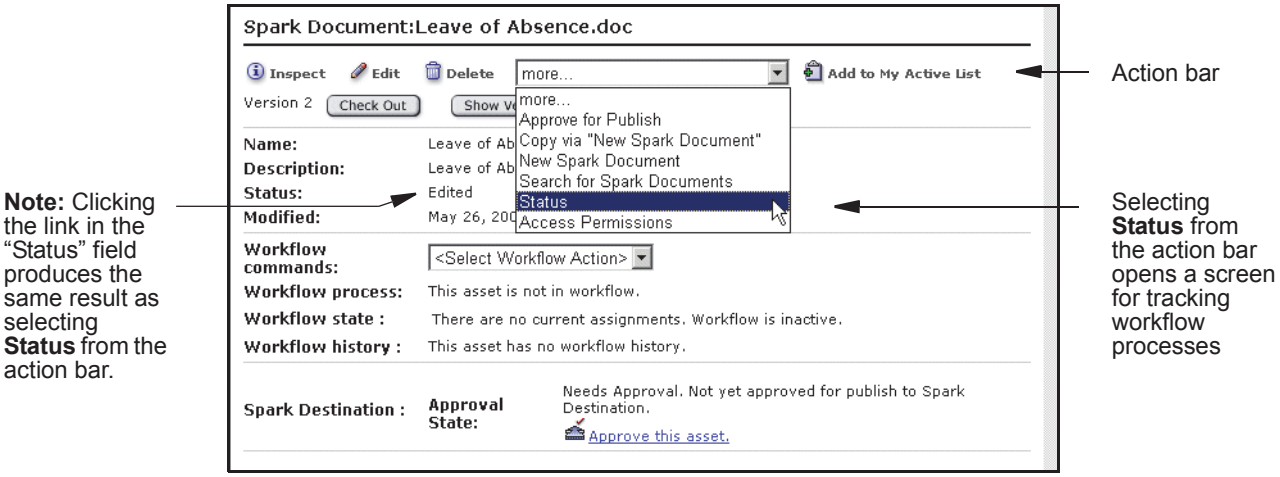
The options are listed in the asset's "Status" form. If some options are not listed for the asset you are working with, it is because the options do not apply or you do not have the permission to execute them.

To select workflow options

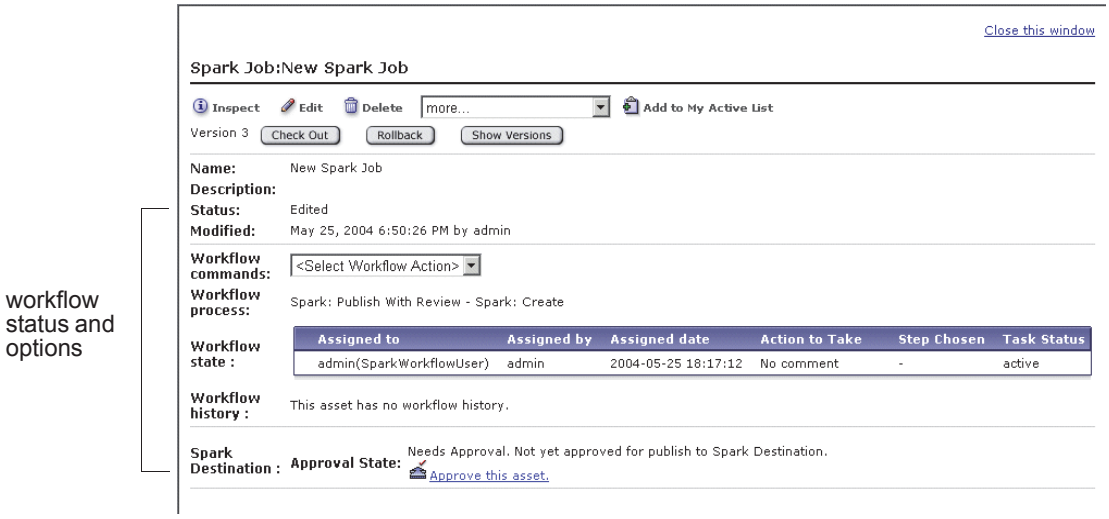
1. Find the asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon to the open the asset.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.

Note

Alternatively, you can go to the "Status" field and click the link it displays.



The portal interface displays the asset's "Status" form, where you can view the status of the workflow and set workflow options.



4. In the **Workflow commands** drop-down list, select one of the options listed in Table 15 (depending on the action you want to take) and go to the cited page for instructions on completing the option.

> **Note**
>
> If some of the following options are missing from your interface for the asset you are working with, it is because the options do not apply, have not been enabled, or you do not have the right permissions.

Table 15: Workflow options

Workflow Options	To complete an option, go to...
Finish My Assignment	step 3 on page 110 in "To finish an assignment"
Set Assignment Deadline	step 5 on page 112 in "Setting an Assignment Deadline for an Asset"
Remove from Workflow	step 6 on page 113 in "Removing an Asset from Workflow"
Select Workflow	step 5 on page 114 in "To assign an asset a workflow in Spark" or step 5 on page 115 in "To assign an asset a workflow in the CS portal interface"
Show Participants (Content Server only)	step 4 on page 116 in "To show the list of workflow participants"
Set Participants (Content Server only)	step 5 on page 117 in "To set workflow participants"
Set Process Deadline (Content Server only)	step 5 on page 118 in "To set a process deadline for an asset"
Delegate Assignment (Content Server only)	step 5 on page 119 in "To delegate an assignment"
Abstain from Voting (Content Server only)	step 5 on page 120 in "To abstain from voting on an assignment"

Finishing an Assignment

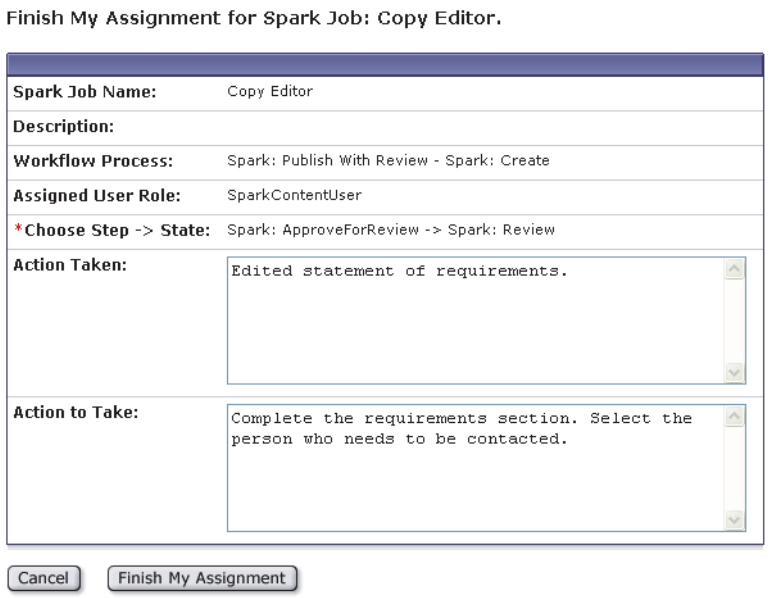
After you complete the work an assignment requires (for example, editing an asset) you must finish the assignment to notify the system and the assignees that you are done so the asset can continue to move through the workflow process.

Note

The term "finish an assignment" has a specific meaning for Content Server's content providers. For more information, see "Finishing Assignments" on page 105.

To finish an assignment

1. Maximize the "Content Assignments" or "Document Assignments" portlet (if it is not already maximized).
2. Click the **Finish** button next to the asset.
3. In the form "Finish My Assignment," do the following:



   a. Locate the "Choose Step -> State" field, and note the possible next steps and the states they lead to. When the option is available, select the next step and state for the asset.
   b. In the "Action Taken" field, type a short description of the work that you completed on the asset.
   c. In the "Action to Take" field, type a short suggestion for the next person who will work with the asset.
   d. Assignment Deadline (if displayed)

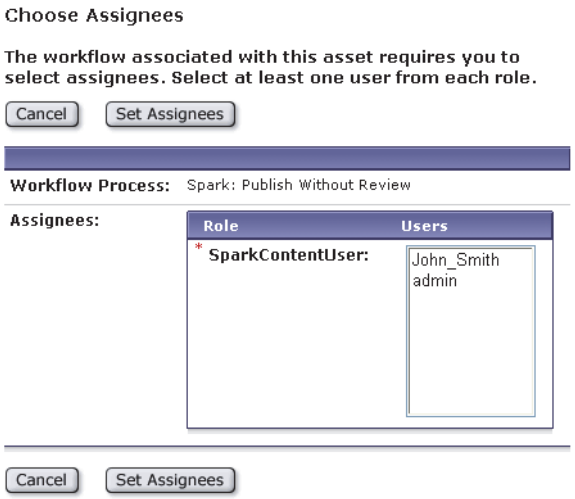
      "Assignment Deadline" is used to override the time allotted for the next assignment. Use "Assignment Deadline" to enter a date in the prescribed format.

If you do not enter a specific date, the assignment is due within the time set by the next state.

4. Click **Finish My Assignment**.
5. If the asset is associated with a workflow that requires assignee selection, the "Choose Assignees" screen is displayed. If the "Choose Assignees" screen is not displayed, proceed to step 6.

   You will use the "Choose Assignees" screen to select the users who can complete the assignment for the next step in the workflow. (This method gives you the flexibility to decide in real time who should get the assignment.)

   In the "Choose Assignees" screen, do the following:



   a. Go to the "Assignees" panel, and in the "Users" menu, select the users whom you want as assignees to receive the assignment. To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user.
   b. Click **Set Assignees**.
6. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**. The action *taken* is visible in the **Workflow history** summary. The action *to take* is visible in the **Workflow state** summary.

   Finishing the assignment also triggers a notification e-mail to the new assignees if the e-mail server and account have been set correctly.

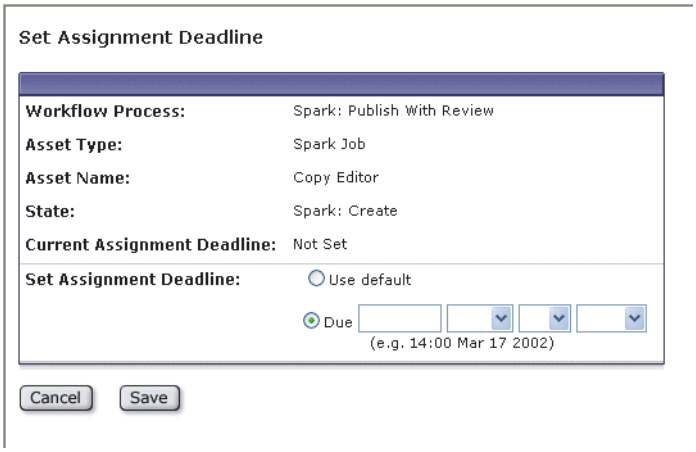
Setting an Assignment Deadline for an Asset

The assignment deadline indicates the time allotted to complete an assignment as an asset advances through workflow.

To set an assignment deadline for an asset

1. Find the asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.

3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. In the **Workflow commands** drop-down list, select **Set Assignment Deadline**.



5. In the "Set Assignment Deadline" form, do one of the following:
   - Select **Use default** to set the assignment deadline to what was specified by your CS administrator in the state definition.
   - Select **Due** and enter the time in the first field. Select the month, day, and year from the remaining fields.

> **Note**
>
> The time field accepts this format: *hh*:*mm*, where *hh* is hours (0-24) and *mm* is minutes (0-60).

6. Click **Save**.

   Content Server returns you to the "Status" form, where a note similar to the following appears at the top.

   Success

   Assignment deadline set to 2004-9-7 9:42:00

The option to set an assignment deadline is also available on the respective form when you are performing the following tasks:

- Assigning an asset a workflow in the CS portal interface (see "Assigning an Asset a Workflow" on page 113)
- Finishing an assignment (see "Finishing an Assignment" on page 110)

Removing an Asset from Workflow

You must have the right permissions to remove an asset from workflow.

To remove an asset from workflow

1. Find the asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. Go to the "Workflow Process" field and make sure that the asset is in workflow. If it is not, you will see a message to that effect. Otherwise, continue with the next step.
5. In the **Workflow commands** drop-down list, select **Remove from Workflow**.

   The following form appears:

6. Click **Remove from Workflow**.

   A confirmation message of the removal appears at the top of the "Status" form, and the "Workflow history" field at the bottom of the form is updated accordingly (the "Task Status" column identifies the workflow as "cancelled").

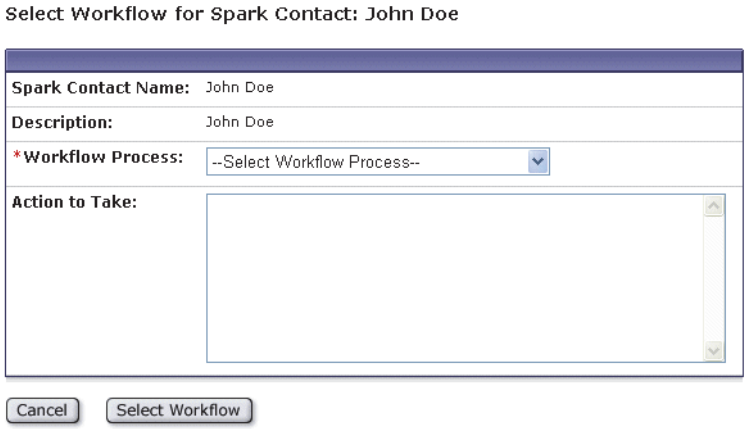
Assigning an Asset a Workflow

If an asset does not have a workflow assigned to it and you feel that the asset must be formally reviewed, you can attach a workflow process to the asset. The asset can be a structured content asset, a document asset, or a folder. You must have the right permissions to assign workflow to an asset.

To assign an asset a workflow in Spark

1. Find the asset in Spark. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. In the **Workflow command** drop-down list, choose **Select Workflow**.

The “Select Workflow” form will open.



5. In the “Select Workflow” form, do the following:
   a. Go to the **Workflow Process** drop-down list and choose one of the workflow options. Select **Spark: Publish With Review** (a three-state workflow), or **Spark: Publish Without Review** (a two-state workflow).

> **Note**
>
> If you are working with a document asset, select **Spark: Publish Document Without Review**.

   b. (Optional) In the “Action to Take” field, indicate to the next assignees what action needs to be taken on the asset (for example, write or edit certain content).
   c. Click **Select Workflow**.
6. In the “Choose Assignees” screen, do the following:

   Go to the “Assignees” panel. From the “Users” list box, select the workflow assignees—users who will complete the next step in the workflow process.

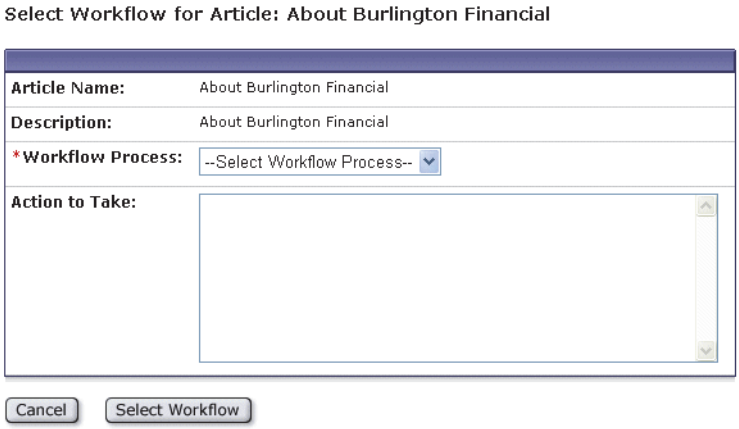
   To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user.

   d. Click **Set Assignees**.
7. The workflow has been assigned to the asset.

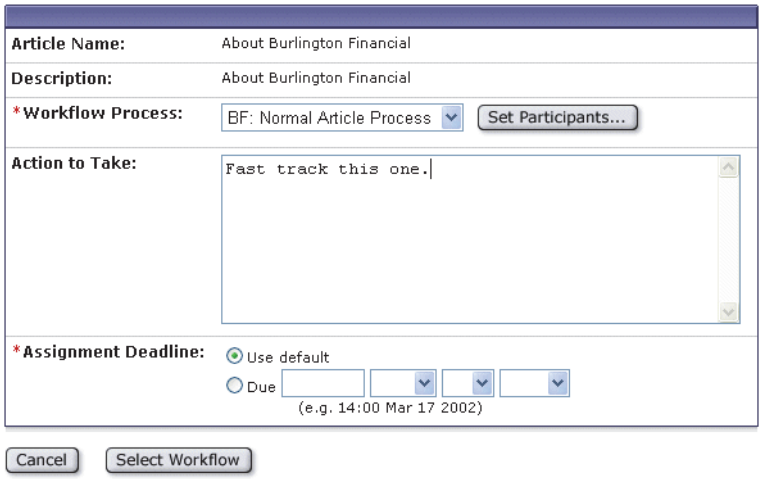
To assign an asset a workflow in the CS portal interface

1. Find the asset in the CS portal interface. (If you need help, see Chapter 7, “Searching for Assets.”)
2. Click the asset’s **Inspect** icon.
3. In the asset’s “Inspect” form, go to the **more...** drop-down list and select **Status**.
4. In the **Workflow command** drop-down list, choose **Select Workflow.**

   The “Select Workflow” form similar to the following opens:



5. In the "Select Workflow" form, select a workflow from the **Workflow Process** drop-down list. After you select a workflow, the form displays more workflow options.



6. (Optional) Click the **Set Participants** button to open the "Set Participants" form and select at least one user from each role. If you do not set participants, as the asset moves through the workflow process, all users in each role will be potential candidates for receiving the assignment (unless **Choose Assignees** has been configured for the assignment method).
7. (Optional) Type instructions in the **Action to Take** text box. These instructions are for the person receiving the assignment.
8. (Optional) Set an **Assignment Deadline** date by which to complete the next assignment, using the prescribed format. If you do not enter a specific date, the assignment is due within the time set by the next state, which will be the default display when you click the **Due** radio button.

   This feature appears only if enabled by the workflow administrator, and is available only if your user role is assigned as an administration role for the workflow process, or you otherwise have the right privileges. For more information, see "Setting an Assignment Deadline for an Asset" on page 111.

9. (Optional) Set a **Process Deadline** date by which the assigned asset is to complete the workflow process, using the prescribed format.

   This feature appears only if enabled by the workflow administrator, and is available only if you have the assigned administrator role for the workflow process, or if you otherwise have the right privileges. For more information, see "Removing an Asset from Workflow" on page 113.

10. When you are finished filling in the form, click the **Select Workflow** button.

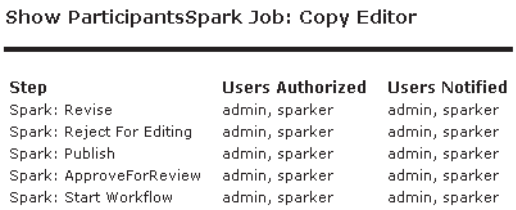
    At this point, workflow is initiated for the asset; assignees who have been selected to complete the next step typically receive e-mail notifications of their assignments.

Showing an Asset's Participant List (CS)

To show the list of workflow participants

1. Find the asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. In the **Workflow commands** drop-down list, select **Show Participants**.

   The portal interface displays the form "Show Participants," where you can examine the list, but not make any changes:


Show ParticipantsSpark Job: Copy Editor

Step	Users Authorized	Users Notified
Spark: Revise	admin, sparker	admin, sparker
Spark: Reject For Editing	admin, sparker	admin, sparker
Spark: Publish	admin, sparker	admin, sparker
Spark: ApproveForReview	admin, sparker	admin, sparker
Spark: Start Workflow	admin, sparker	admin, sparker

   For each step in the workflow process, the form lists the authorized users (participants who can finish the step) and the notified users (selected participants, the assignees, to whom the asset will next be assigned).

Setting Workflow Participants (CS)

In the CS portal interface, you can set participants on assets already in workflow. Perhaps, for example, in your examination of workflow participants, you noticed that a certain user was not listed as a participant in a particular role, and you know that this user should be included.

To set workflow participants

1. Find the asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. In the **Workflow commands** drop-down list, select **Set Participants**.
5. Select the users you want to include and click **Set Participants**.

   The participants list for the asset is updated to reflect your changes.

Note

The participants list will be updated as you requested, but added users will receive the assignment only if the step assigned to their role has yet to be reached.

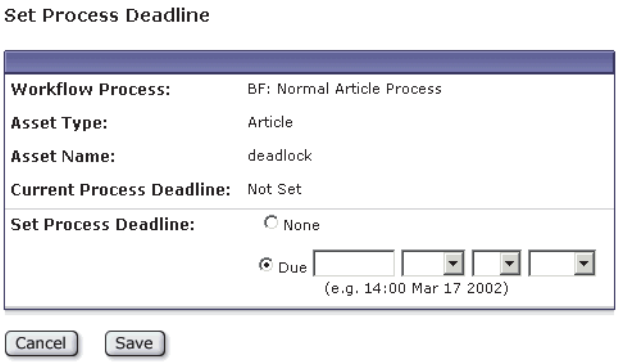
Setting a Process Deadline for an Asset (CS)

The process deadline indicates the overall time allotted for an asset to pass through a workflow process. There is no default process deadline.

The assignment and process deadlines are independent of one another; that is, the total of the individual assignment deadlines does not necessarily add up to a process deadline.

To set a process deadline for an asset

1. Find the asset in the CS portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to **more...** drop-down list and select **Status** from the drop-down list.
4. In the **Workflow commands** drop-down list, select **Set Process Deadline**. The "Set Process Deadline" form opens:



5. Enter a date in the prescribed format. When setting a process deadline, you should consider where the asset is in the workflow process, and the cumulative time of the remaining steps. The default is to have no process deadline.
6. Click **Save** to complete the operation. The system redisplays the "Status" form.

The option to set a process deadline is also available when you are assigning an asset a workflow, if the two previously mentioned prerequisites are met.

Delegating Assignments (CS)

As you review your list of assignments, you might find that you will be unable to complete certain assignments. For example, you might notice that the due date falls within your scheduled vacation time. In situations such as this, you can delegate your assignment to another user who has the same role as you, if this user does not already have the asset assigned in this role. This user is not required to be on the participants list, and can have the asset assigned in another role capacity.

To delegate an assignment

1. Find the asset in the CS portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. In the **Workflow commands** drop-down list, select **Delegate Assignment**.

   The "Delegate My Assignment" form appears:

5. Select the user to whom you want to delegate the assignment. Optionally, enter a comment about your action.
6. Click **Delegate**.
7. A confirmation message of the delegation appears at the top of the "Status" form, and the Workflow state and Workflow history on the form are updated accordingly. This action will also trigger a notification e-mail to the new assignee, if your site is configured to do so.

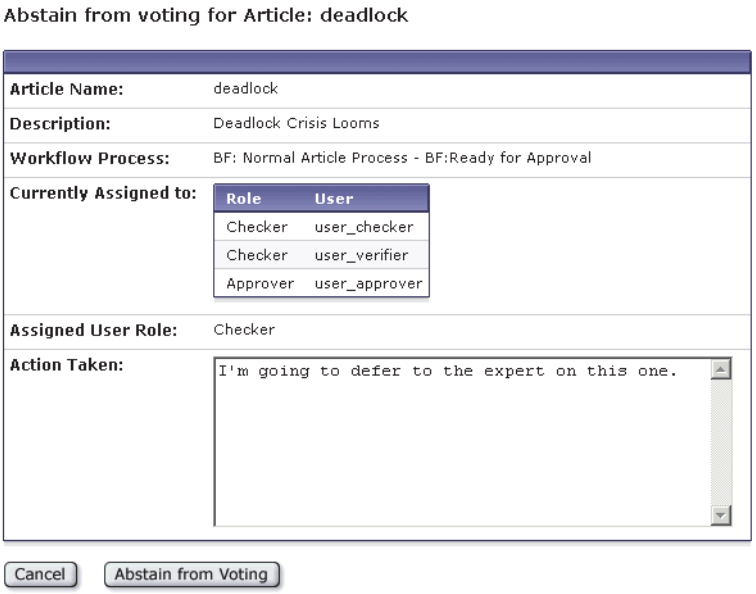
Abstaining from Voting (CS)

Sometimes, you are unable to deal with a particular assignment. Your workload is too heavy, perhaps, or you have been miscast in the role. These are situations in which you might want to abstain from voting, that is, waive your participation.

To abstain from voting on an assignment

1. Find the asset in the CS portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. In the **Workflow commands** drop-down list, select **Abstain from Voting**.

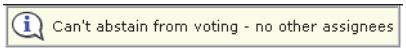
   The "Abstain from Voting" form appears:



5. Enter a brief explanation for your action and click **Abstain from Voting**.

   A confirmation message of the abstention appears at the top of the "Status" form, and the Workflow state and Workflow history on the form are updated accordingly. Note that abstaining does not remove the assignment from your assignments list.

6. If you are the only (or the only remaining) participant in this role, you cannot abstain, as denoted by the following message:

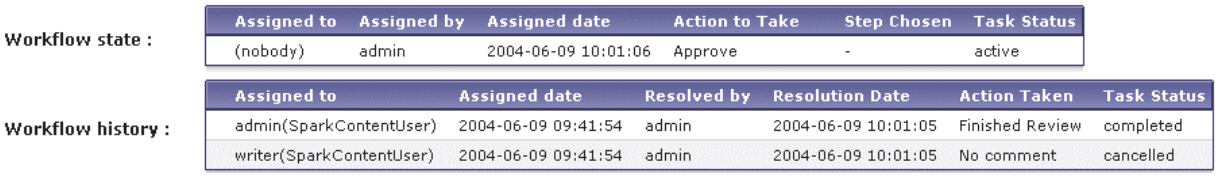
   

   You must find some other means of dealing with this assignment.

Examining an Asset's Workflow Progress

To examine an asset's workflow progress

1. Find the asset in the portal interface. (If you need help, see Chapter 7, "Searching for Assets."
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the **more...** drop-down list and select **Status**.
4. In the asset's "Status" form:
   a. Go to the "Status" field and note the asset's current workflow state.
   b. Go to the "Workflow state," and "Workflow history" fields and review the information they provide.



Workflow state :

Assigned to	Assigned by	Assigned date	Action to Take	Step Chosen	Task Status
(nobody)	admin	2004-06-09 10:01:06	Approve	-	active

Workflow history :

Assigned to	Assigned date	Resolved by	Resolution Date	Action Taken	Task Status
admin(SparkContentUser)	2004-06-09 09:41:54	admin	2004-06-09 10:01:05	Finished Review	completed
writer(SparkContentUser)	2004-06-09 09:41:54	admin	2004-06-09 10:01:05	No comment	cancelled

- "Workflow state" indicates where the asset currently is in the workflow process.
- "Workflow history." Each row represents a single assignment. Items are ordered with the most recently completed state change at the top of the list.

Table 16 defines the columns in "Workflow state" and "Workflow history."

Table 16: Columns in 'Workflow state' and 'Workflow history'

Column	Definition
Assigned To	The user names of the persons that the asset has been assigned to. Note that the user's role appears in parentheses following the user name.
Assigned By	The user name of the person who finished working with the asset. If the asset is in its initial workflow state, this column shows the user name of the person who assigned the asset to a workflow process.
Assigned Date	The date and time the asset was assigned to the user.
Action to Take	Instructions from the user who assigned the asset (if that person entered instructions in the form; appears as No Comment otherwise). Click to view the full text, if incomplete in this view.
Step Chosen	The step indicated by the user who completed the assignment, when there is a choice of next step in the "Finish My Assignment" form.
Action Taken	Information about the work this user did with the asset (if information was entered on the form; appears as No Comment otherwise). Click to view the full text, if incomplete in this view.
Resolved By	The person who took the step that moved the asset to the next state.
Resolution Date	The date and time the step was taken to move the asset to the next state.
Task Status	The status of the assignment. Possible values are as follows: • Active - the asset is currently assigned to someone. • Cancelled - the first assignee moved the asset to the next state, so the assignment has been cancelled for the other assignees. • Completed - the assignee has completed the step.

Chapter 10

Revision Tracking

The revision tracking feature enables you to track changes to your assets and control who makes the changes and when. Revision tracking is used to:

- Ensure that only one user at a given time can edit or delete an asset.
- Help you keep track of past versions of an asset and who created them.
- Help you restore an asset to a previous version (that is, roll it back).

Revision tracking can be executed from the dedicated portlets named “Checked-out Content” or “Checked-out Documents.”

This chapter describes revision tracking and provides instructions for working with revision tracking. It contains the following sections:

- Overview
- Working with Revision Tracking
- Working with ‘Checked-out Content’ and ‘Checked-out Documents’

Overview

Revision tracking provides three major functions:

- Checkout/checkin, which allows you to check out assets from the portal application's (Spark or Content Server) database so that no one else can change them. When you are done with an asset, you check it back in. Then it is available to others for editing. Revision tracking does not keep others from viewing the details of an asset that has been checked out; neither does it keep assets from being found by searches.
- Rollback, which is similar to version control. Rollback allows you to archive work that you might need to revisit.
- Revision history, which provides you with a report on both current and archived work; who has handled the work, and when.

Revision Tracking

Content Server and Spark automatically enable revision tracking for structured content assets and document assets.

Note

In Spark, revision tracking for document assets is not configurable by the Spark administrator.

- Structured content assets by default are configured for single-version tracking, which means that only the current version of the structured content asset is archived. The number of versions that can be archived is set by your administrator. Archiving versions beyond the configured limit overwrites the oldest version of the asset. Contact your administrator if you have any questions or concerns about revision tracking as it applies to you.
- Document assets, by default, are configured for multiple-version tracking. Up to ten versions of a document asset can be archived—the current version and nine previous versions. Additional versions are archived at the expense of older versions. That is, archiving versions beyond the eleventh version overwrites the oldest version. In Spark, the default number of versions (ten) cannot be changed.

Note

Because revision tracking enables automatic checkout, you need to be especially aware of the limit on the number of versions that can be safely archived. For more information, see "When to Use Automatic Checkout" on page 126.

Checkout and Checkin

You control access to an asset by checking it out of the portal application's database and back in. You have three commands by which to control access to assets:

- **Checkout**. Only one user can check out an asset at one time. If other users try to check the asset out or modify it, the portal interface informs them that the asset is unavailable.

  If an asset is assigned to you in a workflow, and you have checked out the asset, then you cannot finish your assignment until you check the asset back in.

  An asset that is checked out cannot be approved for publishing until it is checked in.

- **Checkin**. You check in assets that you have checked out. After the asset is checked in, others can work with it.

  If the asset is assigned to you in a workflow, you finish your assignment by checking the asset in. Only then can the workflow continue.

  When you check in an asset that you have checked out, the portal application creates a record of the checkin, and archives the previously saved version of the asset. The number of versions kept depends on the version limit your administrator has configured.

  If you need to store a backup of the asset you are working on, you can check in the asset (so that you have an archived version). You can then immediately check out the asset and continue working on it. Your current work will be treated as a new version.

- **Undo Checkout**. If you check out an asset and then decide that you don't want to save the work you did on it, cancel or "undo" the checkout. In this case, the asset is simply checked back in and no new version is saved.

Rollback and Revision History

When you check in an asset that you have checked out, it is added to a list of previous versions. You can later restore the asset to one of those previous versions and you can examine the asset's revision history.

- **Rollback** is when you restore the asset to a previous version. When you have an asset checked out, you can roll it back to any previous version. Rollback restores the contents of an asset, but does not reset the status (created, edited, received, and so forth) as of the previous version, nor does it affect workflow status. If the asset is part of a workflow, anyone who has the appropriate permissions can restore it to a previous version.

- **Revision History.** You or any user can list and examine the revision history of an asset. The revision history also shows who, if anyone, currently has the asset checked out.

Automatic Checkout and Checkin

The portal application automatically checks out an asset to you if the asset is checked in *and* you try to edit, delete, roll back, or set workflow for the asset. When you save the

modified asset, the portal application automatically checks in the asset and saves the version.

Note

When you manually check out an asset, edit it, and then save it, the version is *not* saved until you manually check the asset back in.

When to Use Automatic Checkout

Be sure that you rely on automatic checkout only when it is appropriate to do so. For example, if you are going to make one simple change to an asset, you can use automatic checkout.

You should *not* use automatic checkout if you are making extensive revisions. Frequent saving can overwrite older versions that you need to keep, depending on how your system is configured. Specifically, when an asset is automatically checked out to you, the portal application saves an official, archived version of the asset each time you click **Save**. Therefore, if you make several changes to an asset—saving and inspecting each change separately—the portal application automatically checks in a version of the asset at each save. When the number of saves exceeds the number of versions that the portal application is configured to store (as set by your administrator), the portal application overwrites an older version with the newly saved version.

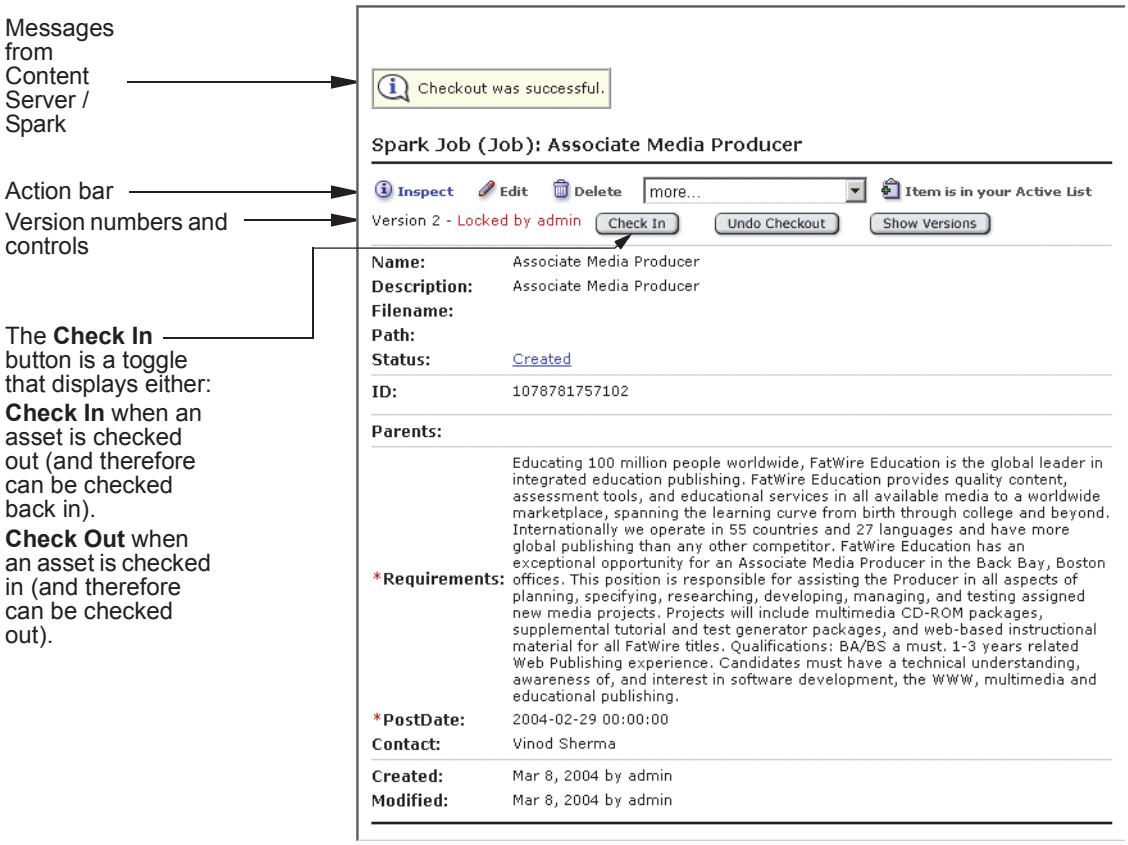
Operations That Invoke Automatic Checkout and Checkin

The following table describes operations that check out or check in assets automatically:

Operation	Effect on Revision Control
Create new asset	Checks out newly created assets to you. As soon as you open a new asset form, the asset is checked out to you and a SYSTEM version is stored. This version has no content. When you save the asset, another (second) version is stored.
Edit	Checks out the asset and prohibits another user from editing the version.
Save	Checks in the asset (but only if it was checked out automatically).
Delete	Checks out the asset. When the user confirms the deletion, the portal application deletes the asset.
Rollback	Clicking **Rollback** checks out the asset, then immediately checks it back in.

Working with Revision Tracking

To work with revision tracking, you will be using the "Inspect" form. Here you can execute revision tracking operations on an asset, and use the asset's checkout / checkin controls. Depending on the action you take, the portal application will display its responses in the "Inspect" form as updates, messages, and other information to help you continue or complete your work.



Checking Out an Asset

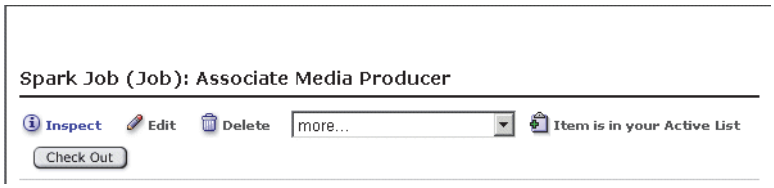
Checking out an asset allows you and no one else to work with the asset. Other users have view-only rights to the asset and its archived versions.

To check out an asset

1. Find the asset you want to check out.
2. Click the asset's **Inspect** icon.

3. In the asset's "Inspect" form, click **Check Out** below the action bar.

Check Out

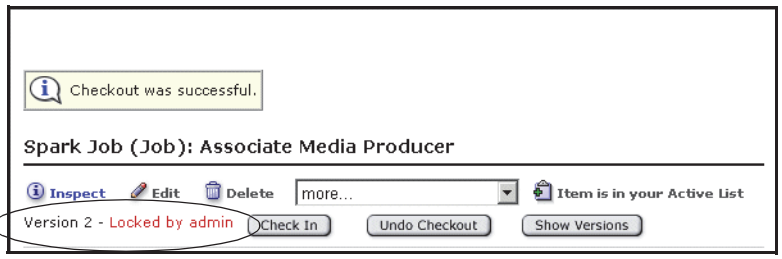


Note

If the asset has been checked out by another user, the portal interface does not display a **Check Out** button. Instead, the portal interface displays the message "**Locked by *User***" (below the action bar) to indicate who has checked out the asset.

If your checkout is successful, the portal interface displays the message **"Checkout Successful**," and updates the checkout status as shown in the figure below:

Status message



The portal application also logs your asset in the portlet "Checked-out Content." (Document assets are also logged in the "Checked-out Documents" portlet.) At this point, no one but you has editorial control over the asset.

Undoing a Checkout

If you check out an asset and then decide that you don't want to save the work you did on it, you can cancel or "undo" the checkout. In this case, the asset is simply checked back in and no new version is saved.

To undo a checkout

1. Find the asset whose checkout you want to cancel. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click **Undo Checkout**, below the action bar.

The portal interface displays the message "**Undo Checkout Successful!**" and unlocks the asset in the database, without recording this checkout.

Checking in an Asset

Checking in an asset unlocks the asset, allowing others to work with the asset.

To check in an asset that you have checked out

1. Find the asset you want to check in. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click **Check In**, below the action bar.

   The portal interface displays the "Checkin" form:

4. (Optional) In the **Comments** text box, enter comments or instructions regarding the version that you are checking in. Your comments will be displayed with the asset title when you view the asset's version history.
5. (Optional) **Keep Checked Out**. Select this option if you want to back up the asset but need to continue working on it.
6. Click **Check In**.

   You are returned to your workspace.

Examining Version History

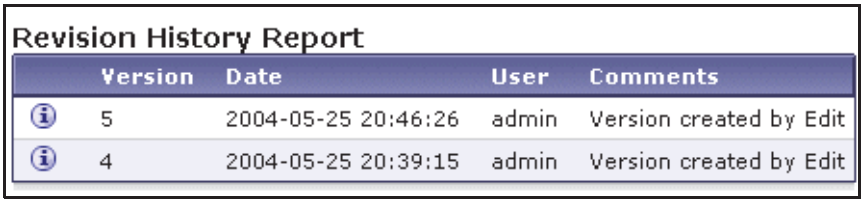
As previously mentioned, revision history is automatically enabled for both document assets and structured content assets. However, for document assets ten versions are tracked by default. For structured content assets only one version—the current version is tracked by default. Tracking of additional versions must be enabled by your administrator.

To examine an asset's version history

1. Find the asset whose version history you want to examine. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click **Show Versions** below the action bar.

   The portal interface displays a "Revision History Report" for the asset.

> **Note**
>
> The example below illustrates revision tracking for a structured content asset. In this example, revision tracking begins with version 4 because the administrator enabled tracking of multiple versions after version 4 was created.



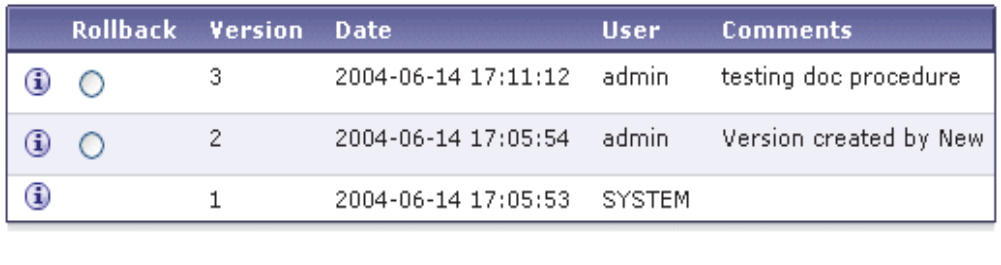
4. You can view any listed version by clicking the appropriate **Inspect** icon in the left column. The inspect view appears in a separate window.

Rolling Back to a Previous Version

To roll back an asset

1. Find the asset you want to roll back. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click **Rollback**, below the action bar.

The portal interface displays a list of the asset’s versions:



Rollback	Version	Date	User	Comments
ⓘ ○	3	2004-06-14 17:11:12	admin	testing doc procedure
ⓘ ○	2	2004-06-14 17:05:54	admin	Version created by New
ⓘ	1	2004-06-14 17:05:53	SYSTEM	

Select the version that you want to roll back to and then click Rollback.

4. Select the option in the **Rollback** radio button next to the version of the asset that you want to return to.
5. Click **Rollback**, below the action bar.

   A confirmation message appears. Note that rolling back an asset creates another version.

Working with ‘Checked-out Content’ and ‘Checked-out Documents’

When you need to know which assets are checked out to you, use the portlets “Checked-out Content” and “Checked-out Documents” to obtain a comprehensive list.

Note

“Checked-out Content” displays structured content assets and document assets that are checked out to you, but “Checked-out Documents” displays only document assets that are checked out to you. Your access to these portlets depends on the permissions granted to you by your administrator.

The list provides a **Check In** button for directly checking each asset into the database, without your having to open the asset’s “Inspect” form. The list also provides the standard **Inspect** and **Edit** icons for you to preview and edit the assets, as necessary, before checking them in.

Note

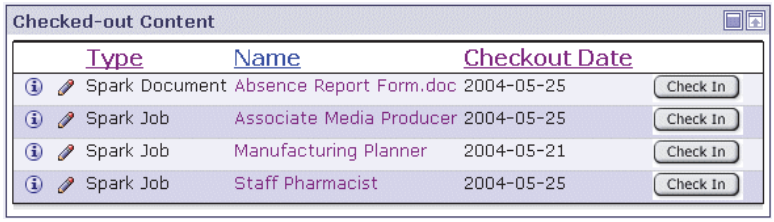
Checking in an asset removes the asset from “Checked-out Content” and “Checked-out Documents.”

To check in assets

1. Maximize "Checked-out Content" or "Checked-out Documents" **to its full-screen size**.

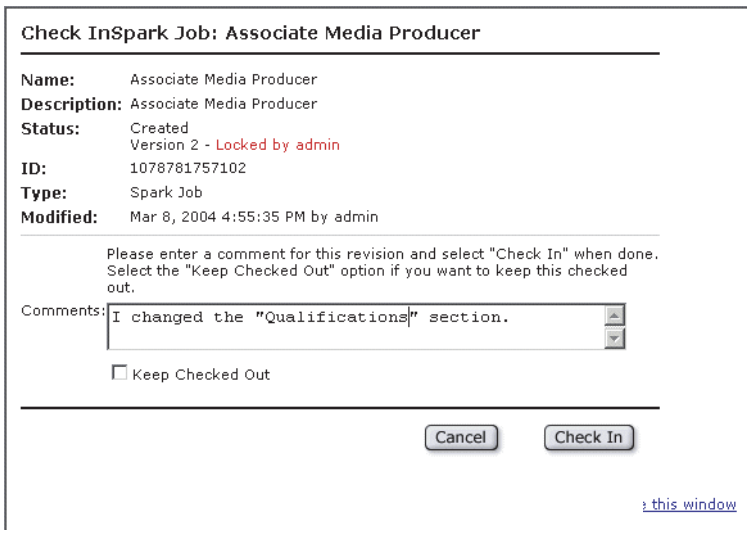
   In this procedure we use "Checked-out Content."

2. Find the asset you want to check in. If you need to sort assets, click on the appropriate column heading.



3. Click the asset's **Check In** button.

   The portal interface displays the "Check In" form:



4. (Optional) In the **Comments** text box, enter comments or instructions regarding the version that you are checking in. Your comments will be displayed with the asset title when you view the asset's version history.

5. (Optional) **Keep Checked Out**. Select this option if you want to back up the asset but need to continue working on it.

6. Click **Check In**.

Releasing Locked Assets

The term “locked assets” is used in reference to assets that have been unintentionally checked out. Releasing locked assets amounts to checking the assets back into the portal application’s database.

Locking up of assets is often caused by automatic checkout. Because automatic checkout is in effect when revision tracking is enabled, you might accidentally check out an asset while you work in the portal interface. If so, that asset is locked, so that no one else can work with it. To ensure that you are not stopping other people from working with assets that you inadvertently checked out, review the assets checked out to you and check in any assets that you do not need.

To release locked assets

Follow the steps in “Working with ‘Checked-out Content’ and ‘Checked-out Documents’” on page 131.

Chapter 11

Publishing

The goal when using Spark or the CS portal interface is to publish content to a portal where visitors can read and interact with that content. When you or someone else in your organization publishes, you move assets from the management system to the delivery system. In Spark and the CS portal interface, publishing tasks are performed using the "Publish Console" portlet.

In Spark, publishing is executed by the Spark administrator or a user with administrative rights. Therefore, Spark publishing is described in detail in the *Spark Administrator's Guide*.

This chapter describes how to perform publishing tasks in the Content Server portal interface. It includes the following sections:

- Overview of Publishing
- The 'Publish Console' Portlet
- Publishing Tasks

Overview of Publishing

If you are not already familiar with the concept of publishing in Content Server, it is a good idea to read about it before going further. It is important to know the different publishing methods, the process of approving assets for publishing and the publishing protection mechanisms available in Content Server. You can find all of this information in the publishing chapter of the *Content Server User's Guide*.

The 'Publish Console' Portlet

The "Publish Console" portlet in the CS portal interface enables you to view and manage publishing activity at the publishing destinations set up for the sites to which you have access. From the "Publish Console" portlet, you can do the following:

- Initiate publishing to a destination that has assets approved and ready to be published
- Locate held assets for a destination and resolve why they are held
- Review publishing events currently in session
- View schedule of publishing events
- View an audit trail of publishing events that have taken place

The next section of this chapter describes how you use the "Publish Console" portlet to complete various publishing tasks.

Publishing Tasks

The following subsections describe how to approve and publish assets within the CS portal interface, based on the assets of the Spark sample site.

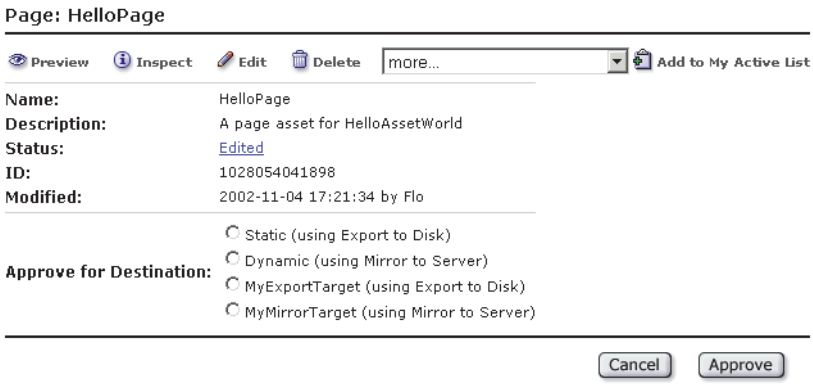
Approving Assets for Publishing

You must have the right permissions to approve assets for publishing. Before approving an asset that can be displayed, you should preview it first.

To approve an asset for publishing

1. Find and select the asset that you want to approve for publishing. (If you need help, see Chapter 7, "Searching for Assets.")

2. Open the asset in the "Inspect" form and choose **Approve for Publish** from the drop-down list. The "Publish Approval" form appears:



3. Select the destination that you are approving the asset for (in the Spark sample site, only "Mirror to Server" is available).
4. Click **Approve**.

   Typical results are shown in a list of assets that are preventing the selected asset from being approved, as follows:

5. The asset cannot be approved because dependent assets need approval. Click **Select All** to select all check boxes next to the assets that need to be approved and click **Approve**. CS calculates the dependencies of these other assets and shows similar results. Continue to approve related assets until all dependencies are resolved.

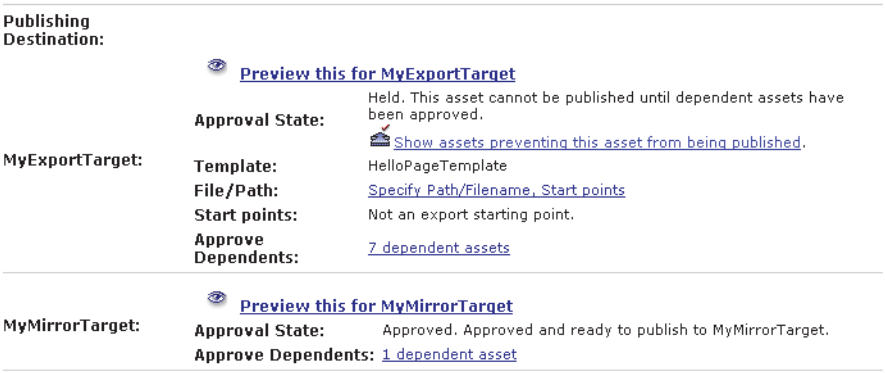
You can also approve assets from the "Status" form; see the section "Checking Approval Status" on page 138.

Asset approval can also be automated. For example, the sample workflow process, Normal Article Process, that is included with the Burlington Financial sample site, has a final step action that automatically approves the workflowed asset to the supplied Static and Dynamic target destinations. For more information, see "How Workflows Operate" on page 104.

Checking Approval Status

To check on an asset's approval status:

1. Find the asset in the CS portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon to the open the asset.
3. In the asset's "Inspect" form, go to the action bar and select **Status** from the drop-down list.
4. In the "Status" form, scroll down to the **Publishing Destination** area, which is similar to the following display:



The form displays the approval status of the asset for each destination that is defined by the administrator for the current site:

Preview this for *destination* – a hyperlink that you click to display the asset in the preview window.

- For static publishing destinations, the default approval template (identified by **Template**) checks the asset's dependencies. For more information, see the publishing chapter in the *Content Server User's Guide*.
- For dynamic publishing and export to XML destinations, the asset is merely displayed.

Approval State – describes the current state of the asset in the approval cycle. A hyperlink is provided if some action is required; for example, **Approve this asset**. For more information, see "Approval States" on page 139.

File/Path: Start points – (static destinations only) a link to a form where you define an export starting point; that is, a top-level page (for example, Home) from which to calculate dependencies. Optionally, you can override file and path names that were specified at the time the asset was created. For more information, see "Assigning an Export Starting Point" on page 141.

Approve Dependents – a link to a list of assets that are dependent on the current asset. These dependent assets may already be approved, may need to be approved, or may be held, pending approval of other dependent assets, as shown in the following sample list snapshot:


7 dependent assets

	Asset Type	Name	Description	Status	Approval Status	Dependency Type
	Template	HelloCollectionTemplate	This template displays the HelloCollectionHello collection.	Edited	Needs Approval	Exact
	HelloArticle	spacejunk	story about space debris	Edited	Approved	Exact
	Collection	HelloCollectionHello	A collection of articles in the HelloAssetWorld site	Edited	Held	Exact

When you click the **Needs Approval** link for an asset in the list, CS approves the asset and calculates its dependencies. This asset's approval status will now be either **Approved** or **Held**.

When you click the **Held** link for an asset in the list, CS shows a list of assets that need to be approved before the held asset can be published. Click **Select All** to select all check boxes next to the assets that need to be approved and click **Approve**.

These two events parallel the actions that you take in steps 4 and 5 of the procedure described in the section "Approving Assets for Publishing" on page 136.

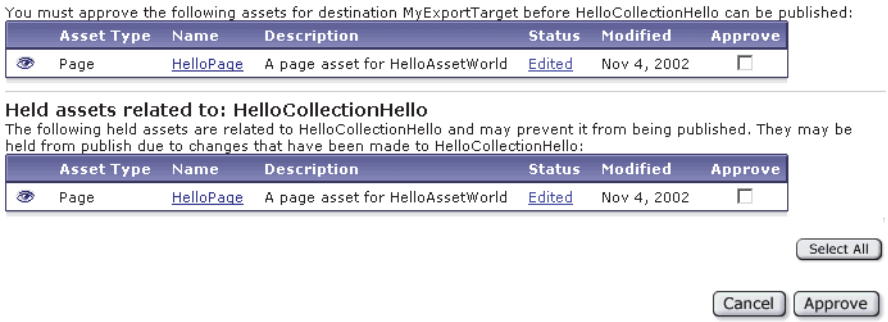
Approval States

The following table lists the approval states that can appear in the "Status" form for each publishing destination, what the states mean, and appropriate action, where indicated:

State	Meaning
Approved. Approved and ready to publish to *destination*	(Informational) This asset will be published at the next publishing event to this destination, unless the asset is changed, or an exact dependency changes.
Approved and published. Asset version is the same as that on *destination*	(Informational) An asset has been published to this destination.
Currently checked out. Will not be published to *destination*	(Action may be required) The asset is checked out by a user. Although approved, it cannot be published until the user relinquishes control, by: • Checkin - the asset must be reapproved. • Undo Checkout - the asset remains approved and can be published. • Rollback - the asset must be reapproved.
Approved for inclusion as a link in pages exported to *destination*.	(Informational) This asset is approved for static publishing, if it is linked to from the page that is being exported.
Asset has been modified since approved for publish to *destination*.	(Action required) The asset must be reapproved. Click the **Approve this asset** link to initiate the approval process.

State	Meaning
Approved, but approval for publish to *destination* was based on versions of the dependent assets that no longer exist.	(Action required) The asset must be reapproved so that its version matches that of its dependents. Click the **Approve this asset** link to initiate the approval process.
Held. Approved, but dependent assets have not been approved for publish to *destination*.	(Action required) The asset will be held until the dependents are approved. Click the **Show assets preventing this asset from being published** link to view and approve the dependents.
Needs Approval. Not yet approved for publish to *destination*.	(Action required) The asset must be approved. Click the **Approve this asset** link to initiate the approval process.
This asset cannot be published until assets referring to this asset have been approved.	(Action required) A referring asset has to be approved before this asset can be published. Related assets that are held are also listed and may require approval. Click the **Show assets preventing this asset from being published** link to view and approve referring and related assets.

Clicking the **Show assets preventing this asset from being published** link displays a form similar to the following:



Note that Hello Asset World is a simple site; in a more complex site, there would typically be longer lists of assets. What's significant is that the form not only shows assets that must be approved before the asset can be published, but also shows any held assets that are related to that asset. You can click **Select All** to select the assets in both lists and click **Approve** to resolve all actual and potential conflicts.

Resolving Approval Conflicts

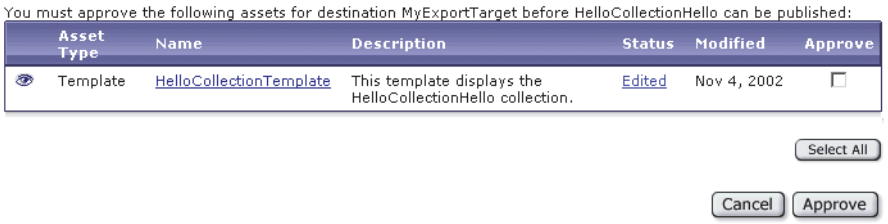
Approval conflicts arise when an asset is approved but is held from publishing because dependent or referring assets have not been approved. The sections "Approving Assets for Publishing" on page 136 and "Checking Approval Status" on page 138 describe how to resolve approval conflicts for individual assets.

To resolve approval conflicts globally for multiple assets, use the "Publish Console" portlet to examine the publishing status for a specific destination, as described in the following procedure.

To resolve conflicts for a destination:

1. In the CS portal interface, open the "Publish Console" portlet.
2. Choose a destination from the drop-down list and click **Select Destination**.
3. Click the hyperlink to held assets, if any, for the selected destination. The list of held assets appears:

4. Click the **Held** hyperlink in the **Approve** column to open the "Publish Approval" form:



5. Click **Select All** to select all check boxes next to the assets that need to be approved and click **Approve**.
6. Return to the list of held assets for the destination and repeat steps 4 and 5 until you have resolved all approval conflicts. The batch of approved assets can then be published to that target destination.

Assigning an Export Starting Point

When you export to disk, you must define a publish starting point so the system knows where to start publishing from; that is, you specify a top-level asset, to publish that asset and all the assets it links to.

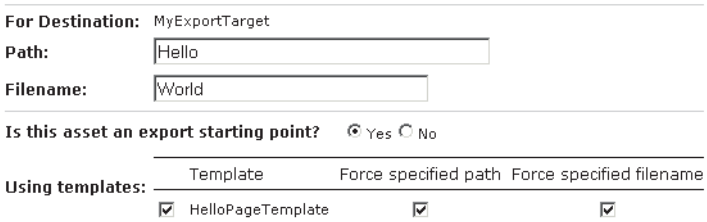
When you assign an asset as a starting point, you also have to specify the template to use for the asset. You can specify multiple templates for different publishing contexts.

To assign an asset as an export starting point:

1. Find the asset in the CS portal interface. (If you need help, see Chapter 7, "Searching for Assets.")

1. Click the asset's **Inspect** icon to the open the asset.
2. In the asset's "Inspect" form, go to the action bar and select **Status** from the drop-down list.

3. In the **Publishing Destination** portion of the "Status" form, locate the static destination and click the **Specify Path/Filename, Start Points** link. The asset form presents specific fields, as shown in the following example from the Hello Asset World sample site:



4. Fill in the form as follows:

   a. **Path** (optional) Specify a directory path to override the path specified on the asset form, if any. Be sure to follow the naming conventions implemented by the administrator. Note that you can specify this value independent of declaring the asset a starting point.

      The path is appended to the *installation-dir*`/export` directory. For this example, then, the path becomes *installation-dir*`/export/Hello`.

   b. **Filename** (optional) Specify a file name to override the file name specified on the asset form, if any. Be sure to follow the naming conventions implemented by the administrator. Note that you can specify this value independent of declaring the asset a starting point.

      The default file name is *site-assettype-template_assetid*`.html`. The specified file name replaces the asset ID in this string. For this example, then, the file name becomes *site-assettype-template*`_World.html`. CS uses a naming convention that guarantees uniqueness. If you override this default naming convention, the file name that you specify must be unique.

      To summarize, the path and file name specified here is specific to the destination. If these fields are left blank and the asset itself has a path and file name specified, those values are used. Otherwise, CS uses the default naming convention to determine the path and file name. For more information, see the *Content Server Administrator's Guide.*

   c. Click the template to use for the starting point. Clicking a template automatically selects the **Yes** radio button. You can select multiple templates to define multiple starting points. For example, you might want a text-only starting point and a graphics-rich starting point, in which case, you might select the respective templates.

   d. Indicate whether to force the specified path. Looking at the example, if you force on path, but not on file name, the path and file name become `Hello/`*`site-assettype-template`*`_World.html`

   e. Indicate whether to force the specified file name. Forcing the file name drops the `site-assettype-template` portion, so that the name becomes simply the file name. Looking at the example, the path and file name then become `Hello/World.html`.

      If you are defining multiple starting points, you can force the file name for only one of them.

5. Click **Save**. The "Status" form is updated with the specified information.

Publishing Approved Assets

As you approve assets, they are aggregated by destination for publishing. When assets are published, they are mirrored on the server or exported to disk, as appropriate to the publishing delivery type.

Publishing can occur immediately from the "Publish Console" portlet, and as a scheduled event that the administrator sets. In both cases, publishing occurs as a background process, so you can continue to work in the CS portal interface. Who can publish is a matter of site policies and procedures.

To publish approved assets:

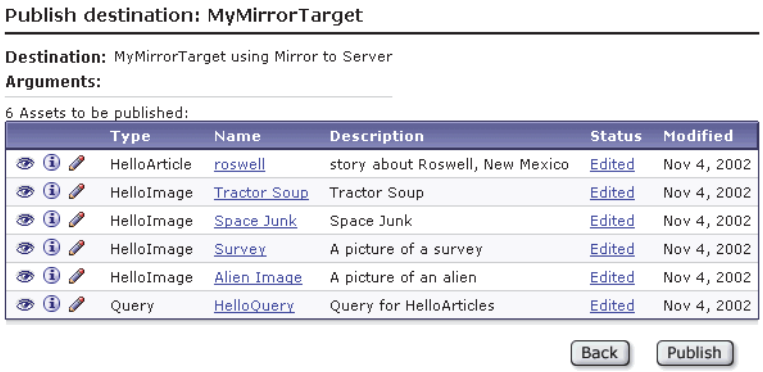
1. In the CS portal interface, open the "Publish Console" portlet.
2. From the **Publish destination** drop-down list, choose a publishing destination. The "Publish" form appears in a format based on the delivery type:

   For Export to Disk:

   The Export to Disk delivery type is reference-based; that is, the HTML files being published contain references to the approved assets. If there are no asset references ready to be published to the selected destination, the **Publish** button does not appear on the form. There is also a link to starting points. Remember that publishing to a static destination requires a starting point (for more information, see the publishing chapter in the *Content Server User's Guide*).

   For Mirror to Server:

   If there are no assets ready to be published to the selected destination, the **Publish** button does not appear on the form.
3. To view the list of approved assets, click the hyperlink:



Clicking **Back** takes you to the previous view.

4. To publish the approved assets to the selected destination, click **Publish**. At the confirmation message, click **OK** to continue.

   A message either confirms that the publishing task started, or denotes that the task could not be started because publishing is in progress to the destination. Click the hyperlink to return to the Publish Console.

> **Note**
>
> You cannot selectively publish assets to a destination; that is, you can only publish all approved assets.

Viewing Current Publish Activity

To examine current publish activity:

1. In the CS portal interface, open the "Publish Console" portlet.
2. Scroll down to **Running Publish Sessions**, shown as follows:

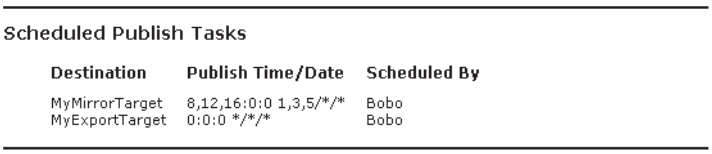
Note the following about running sessions:

- This list displays currently running publishing sessions (by destination) that were triggered either from the Publish Console or as a timed event. The sessions are listed with the most recent one first.
- Status can be either **Running** or **Error**, which is a hyperlink to an explanation of the problem and possible causes.
- There is an inspect icon that allows you to review the activity in progress. If a session has a status of **Error,** a trashcan icon appears so that you can delete the session after troubleshooting the cause of the error. These icons appear only for destinations that are configured for the current site. For other destinations, you can view whether a publishing session is in progress or in error, but you cannot inspect the session contents or delete a session that is in error.

Viewing Scheduled Publish Activity

To check scheduled publish activity:

1. In the CS portal interface, open the "Publish Console" portlet.
2. Scroll down to **Scheduled Publish Tasks**, shown as follows:


Scheduled Publish Tasks

Destination	Publish Time/Date	Scheduled By
MyMirrorTarget	8,12,16:0:0 1,3,5/*/*	Bobo
MyExportTarget	0:0:0 */*/*	Bobo

Note the following about scheduled publishing:

- The administrator configures publishing as a timed event by destination.
- Time format is `hh:mm:ss W/DD/MM`, where:

```
hh (hours)=0-23
mm (minutes)=0,15,30 or 45
ss (seconds)=0
W (days of the week)=0 (Sunday)-6(Saturday)
DD (days of a month)=1-31
MM (months)=1-12
```

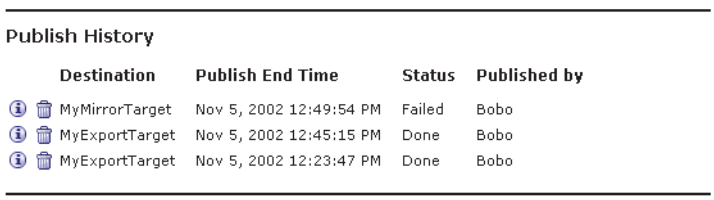
In the example shown, publishing is scheduled to **MyExportTarget** every day of the year at midnight. For **MyMirrorTarget**, publishing is scheduled for every Monday, Wednesday, and Friday at 8:00 a.m., noon, and 4:00 p.m.

Schedule information is available for all destinations across all sites.

Viewing Publish History

To review publish history:

1. In the CS portal interface, open the "Publish Console" portlet.
2. Scroll down to **Publish History**, shown as follows:


Publish History

Destination	Publish End Time	Status	Published by
MyMirrorTarget	Nov 5, 2002 12:49:54 PM	Failed	Bobo
MyExportTarget	Nov 5, 2002 12:45:15 PM	Done	Bobo
MyExportTarget	Nov 5, 2002 12:23:47 PM	Done	Bobo

Note the following about publishing history:

- This list displays up to 20 completed publishing sessions. The sessions are listed with the most recent one first.
- Status can be either **Done** (success) or **Failed** (trapped as an error when the session was running).
- There is an inspect icon that allows you to review the results of a completed session, as shown below. A trashcan icon is available to delete a session record. You can archive session records before deleting them. These icons appear only for

destinations that are configured for the current site. For other destinations, you can view whether sessions have completed, but you cannot inspect the session results or delete the session record.

The eyeball icon lets you preview the published asset; the asset name link opens the published asset in the “Inspect” form.

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