FatWire | Content Server 7

Version 7.6

Dash Interface User's Guide

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SOFTWARE

FatWire Content Server Dash Interface User’s Guide
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About This Guide

This guide provides an overview of FatWire Content Server's functionality that you as a content provider will utilize to create, edit, and approve content for publication on your organization's online site.

Since this guide is written specifically for content providers, it is intended to help you use Content Server efficiently to perform your content management tasks without requiring technical proficiency. Typically, content providers are specialists in fields such as corporate communications, finance, human resources, sales, and marketing whose expertise is rooted in content, and not the software used to manage it.

This guide is also helpful to individuals who support content providers, perform their functions, or simply need to understand Content Server's basic concepts, such as administrators who support content providers by developing and customizing the installation to meet their needs.

Who Should Use This Guide

This guide was written especially for content providers — anyone who creates, reviews, and approves content from FatWire Content Server's Dash 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 is not required.

This guide is also helpful to individuals who support content providers, perform their functions, or simply need to understand Content Server's basic concepts. For example, this guide is helpful to the CS administrator, who supports content providers by developing and customizing the installation to meet their needs. Furthermore, the administrator maintains the installation and provides the business users with technical services.

How This Guide Is Organized

To help you navigate through the information in this guide, the guide is divided into parts. Each part deals with a particular aspect of Content Server, and is divided into chapters, each dealing with a particular concept or process. The parts are as follows:

Part 1: Introduction

This part provides an introduction to Content Server and its underlying architecture. It describes the basic concepts and dependencies on which Content Server constructs are based.

Part 2: Working in the Dash Interface

This part describes how to use Content Server's Dash interface. It explores the basics of the navigation and interaction with the Dash interface, explains tasks common to working with all asset types, and goes on to describe specific tasks and processes that you as a content provider will need to accomplish when working with Content Server.

Part 3: Appendices

This part contains appendix material helpful in further understanding some of the concepts presented in this guide.

Other Helpful Information

The end of the guide includes an index of procedures to help you quickly navigate to content management steps, as well as a general index containing most important terms and keywords used in this guide you can use as a quick reference.

Figures and Diagrams

This guide contains figures and diagrams that use parts of the Content Server interface running the FirstSite II sample site. Due to the highly customizable nature of Content Server, your interface might appear slightly different from the depictions used in this guide. Because of that, all such depictions are for reference only.

Typographic Conventions

To help you navigate and comprehend the information in this guide more easily, the following typographical conventions are used throughout:

- **bold type** – indicates names of buttons, links, fields, and form sections displayed in the interface, as well as any information you might be asked to enter verbatim into the Content Server interface.
- "text in quotes" – indicates names of forms, screens, and drop-down lists displayed in the interface.
- *italicized type* – indicates names of variables, as well as any text that varies depending on your selection.
- `monospaced type` – indicates a URL, a file system path, or a piece of code.

Related Publications

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

`http://e-docs.fatwire.com`

The documentation website is password-protected. You can obtain a password from FatWire Technical Support (click **Request for a New Account**). More information about FatWire Technical Support is available at the following website:

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

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

Part 1

Introduction

This part provides an introduction to FatWire Content Server. It contains the following chapter:

- Chapter 1, “Overview”

Chapter 1

Overview

As a content provider, you create, manage, and deliver web site content. Your expertise is rooted in the content, not in the software used to manage it. Since this guide is written specifically for content providers, it is intended to help you use FatWire Content Server efficiently to perform your content management tasks, without requiring technical proficiency.

This chapter contains the following sections:

Introduction to FatWire Content Server

FatWire Content Server is a software suite that allows you to create and manage content for publication to your online site. The content is stored in Content Server's database. You create and manage the content using Content Server's interface, which provides a simple and intuitive way of accessing and working with the database.

The content that you manage depends on the nature of your organization: a news site might produce articles, photos, and video clips; a human resources department might manage job postings and personnel policies; an online retailer might offer product descriptions, special offers, coupons, and so on. Content can be moved from its creation to your online site in steps, from person to person, in a process called **workflow**. Along the way, collaborators can use revision tracking to audit changes made to the asset. Your end goal is to **publish** content so that site visitors can view it. (Publishing functions are available in the Advanced interface.)

Content Server Systems

Content management (CM) system: a Content Server system used by content providers to create and edit content. When ready for public delivery, the content is published (copied) from the CM system database to the delivery system, and from there, served to visitors' browsers.

Delivery system: a Content Server system that accepts and stores a duplicate of the content published from the content management system. The delivery system is the online site that visitors access. When content is requested by a site visitor, the delivery system formats, lays out (unless the content is already cached) and delivers that content to the site visitor's browser.

From the Content Entry Interface to the Online Site

When creating and editing content in Content Server, you use content entry forms. Their purpose is to give you an easy, intuitive way to store content in the CS database, without having to access the database directly. Content that you enter is related to the CS database and the visitor's site as shown in Figure 1 and Figure 2, and explained below:

1. When you populate a content entry form (for example, the "Article" form in Figure 1) and save the content, Content Server stores the content in its CM system database (step 1 in Figure 1).
2. After you (or another user) approves and publishes the content, it is copied to the delivery system (a duplicate database in our example, as shown in step 2, Figure 1).
3. Finally, when the content is requested by a site visitor, it is automatically retrieved from the delivery system, formatted, laid out, (step 3 in Figure 1) and delivered to the visitor's browser by code (step 4 in Figure 2). (This code is written by developers according to site designers' specifications.)

In simple terms, a content entry form accepts raw content for storage in the CM system database. When published content is requested by a site visitor, the delivery system renders the content (unless it is already cached) in viewer-ready form in the visitor's browser.

Content entry forms offer the following advantages:

- Users don’t need to learn the specifics of Content Server’s database.

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

  Because a content entry form provides a standard interface to the variety of databases that Content Server supports, 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 DB2) 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. A default format (specified in the templates) is applied when a user-defined format is unavailable. And when a field displays a WYSIWYG editor (“What You See Is What You Get”), you can use its tools to format the field’s content – without having to know HTML. As a content provider, you have the option to remain strictly focused on the content, or to determine its appearance, as well.

- Required information is clear.

  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. You always know what kind of content is expected from you.

- Reusability and consistency are maximized.

  Each piece 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 online site as necessary. Reusability ensures consistency across the site by eliminating the need for re-creating content each time it must be used.

Figure 1: Content entry form

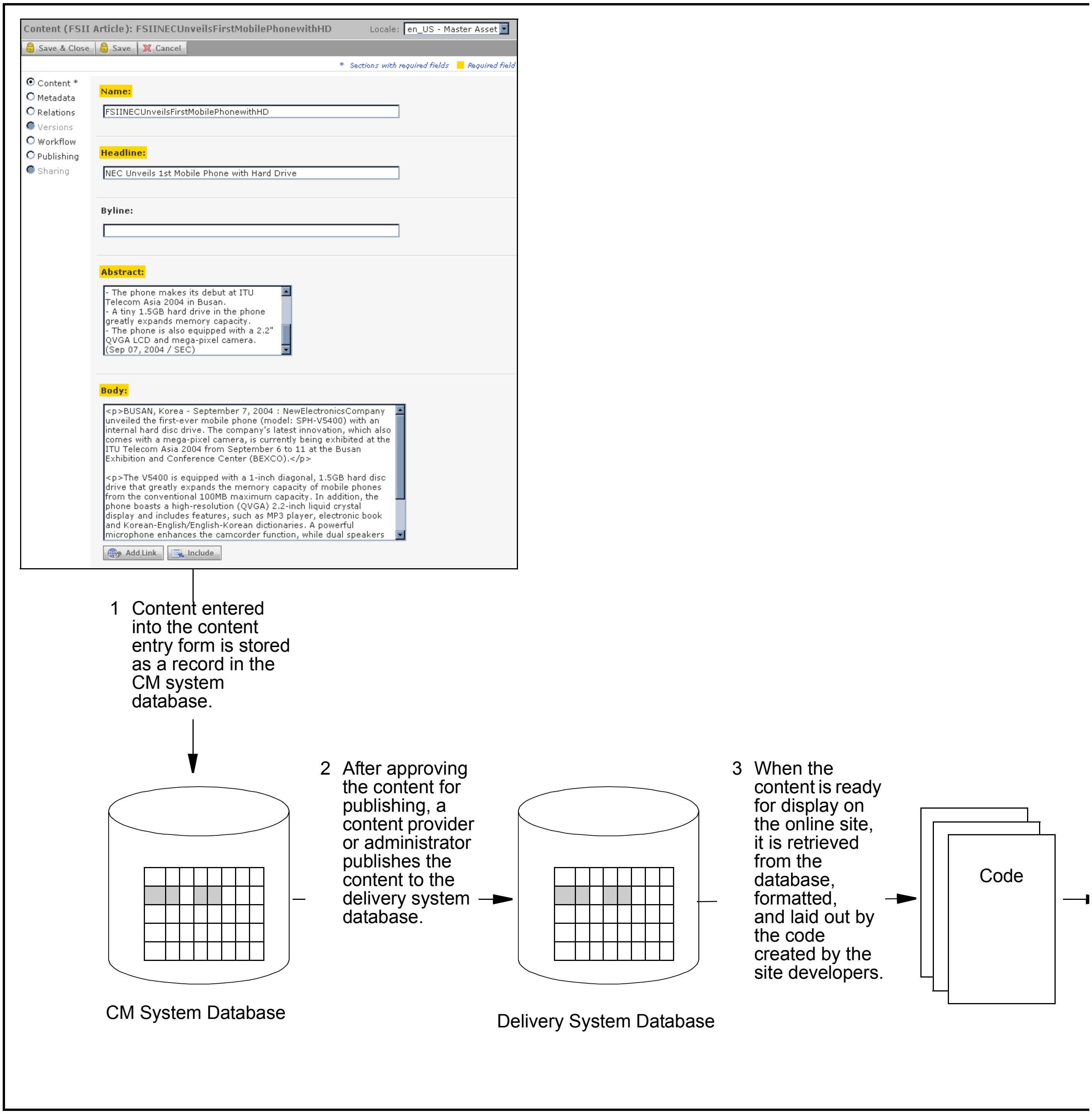
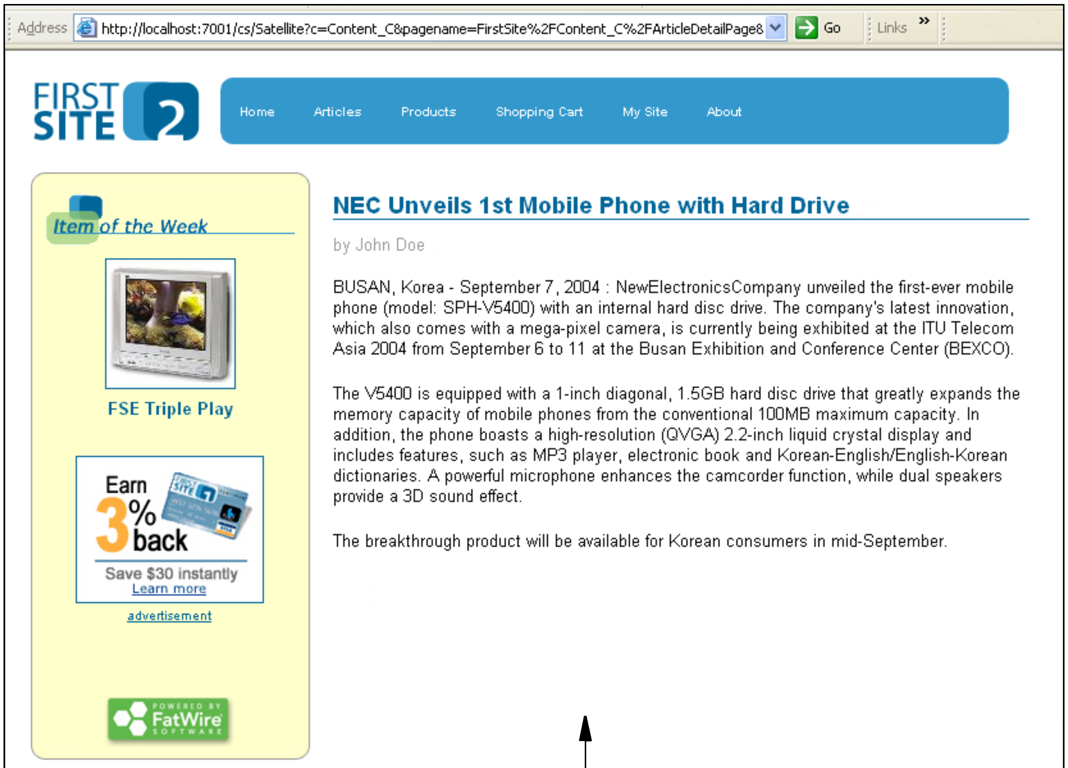


Figure 2: Online site



4 Formatted content is displayed on the online site.

Exploring Content Management Concepts

Content Server defines content in terms of "assets," and "asset types," which are used throughout this guide.

Content: Asset Types and Assets

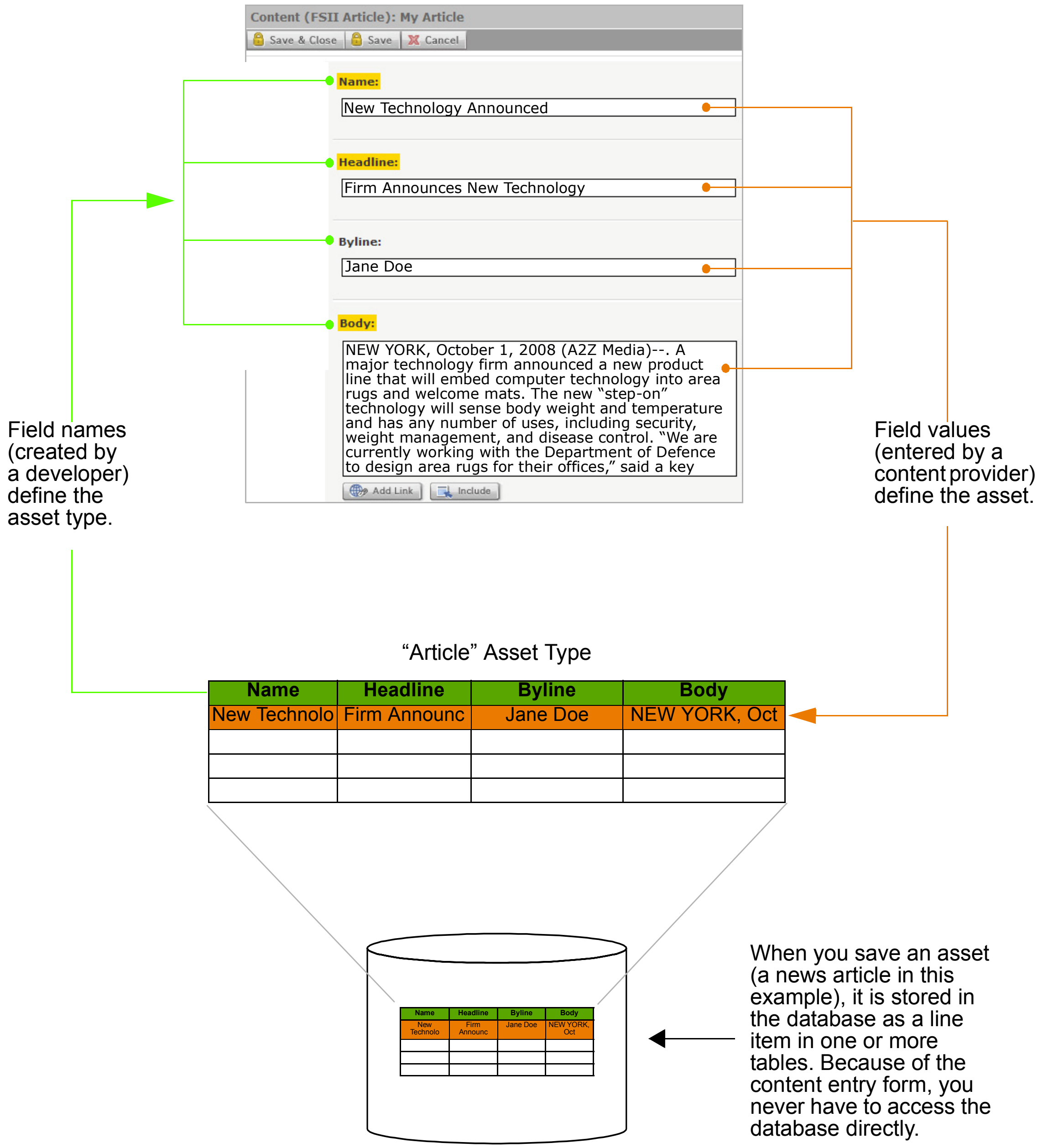
Content items that you manage using Content Server are called **assets**, for example, articles, product descriptions, advertisements, photos, and video clips.

An **asset type** is an object that defines to CS users the type of content they are expected to provide. An asset type is used to create assets of that type. For example, if you publish magazine articles and sports car advertisements, you would create the magazine articles from the "Article" asset type and the advertisements from the "Sports Car" asset type.

Each asset type is represented in the CS interface as a content entry form (such as the one you see in Figure 3, on page 21) whose field names map to the column headings of a database table (or multiple tables), used to store your field values. Because the set of field names defines the asset type, it also defines the type of content you are expected to provide. When you type in field values and save them, you create a record—an "asset"—in the CS database table. That asset is content, which you can edit or delete, pass through a workflow, and publish. (Note that by using the content entry form, you never have to access the database directly.)

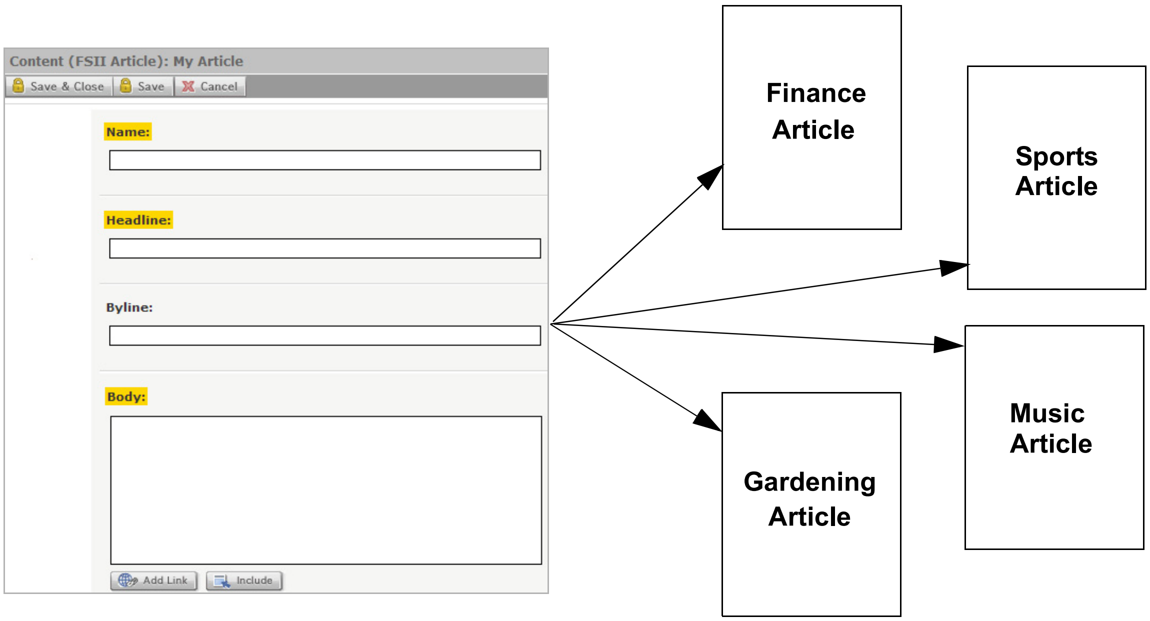
Figure 3 illustrates the concept of "asset type" and "asset" by relating a news article to the "Article" asset type.

Figure 3: Relation between an asset and its asset type

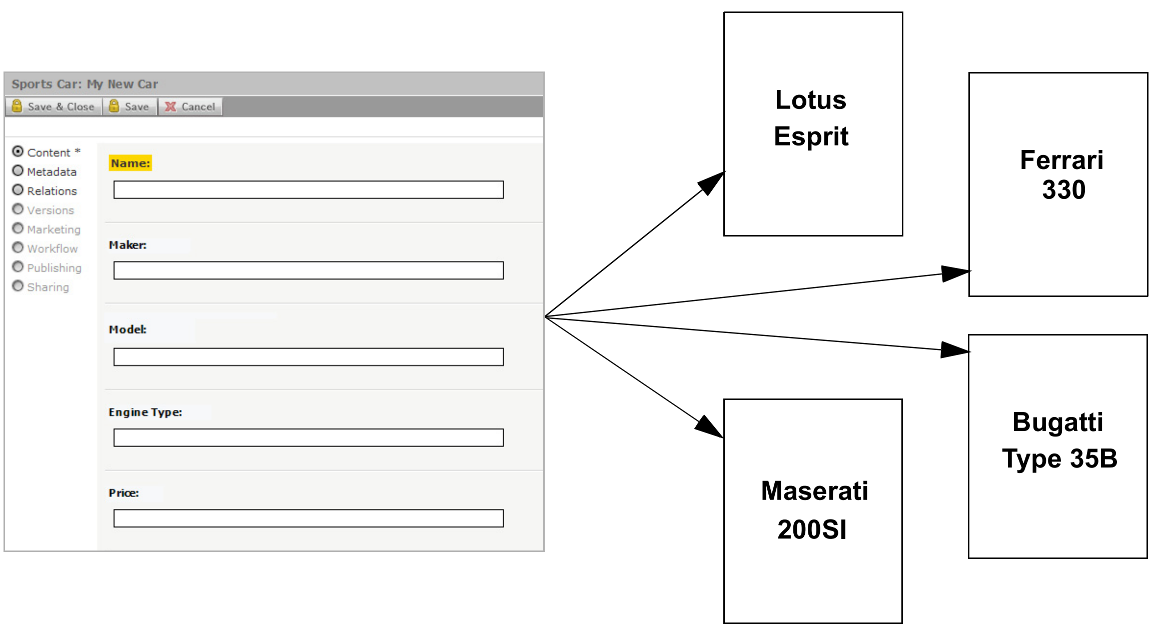


An asset type is reusable, allowing you to create many unique assets from a single content entry form. Each asset is an instance of its asset type.

In our example in Figure 3, on page 21, we have the "Article" asset type from which a content provider created a newspaper article on the subject of Technology. Other content providers created the Finance Article asset, the Gardening Article asset, the Sports Article asset, and the Music Article asset (shown below), all of which are instances of the "Article" asset type. Each instance is stored as a record in the "Articles" database table.



In the next example, we have the "Sports Car" asset type, with a different set of fields, from which content providers created the Lotus, Ferrari, Maserati, and Bugatti assets. All are instances of the "Sports Car" asset type. Each instance is stored as a record in a database table named "Sports Car."



Typically, developers create many different asset types, giving you an appropriate range and type of content to create and publish. Each asset type has its own content entry form, formatted as shown on page 21, but with a unique set of fields. When saved, an asset is stored in Content Server's database. The asset can be edited, inspected, deleted, duplicated, placed into workflow, tracked through revision tracking, searched for, and delivered to the online site.

Note

To be technically accurate, field names in a content entry form are *attributes*. The distinction is important to administrators and developers, but does not affect the content provider's work or understanding of content management in Content Server. For this reason, the terms "field" and "attribute" are used interchangeably throughout this guide.

Structured Content Assets and Document Assets

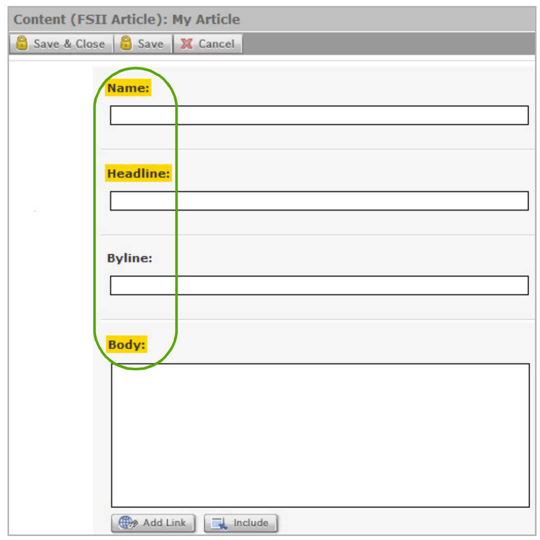
As a content provider, you are likely to manage two kinds of assets: **structured content** assets and **document** assets. The difference is that a structured content asset requires you to enter prescribed pieces of content directly into the Content Server interface, whereas a document asset requires you to provide a file with the content (or layout) of your choice. The developer who creates the asset type specifies whether the asset type supports structured content, or documents, or both.

Structured content is used to enforce uniformity and standards. By contrast, file-based content is used when a free-style approach is acceptable. File-based content gives you the freedom to compose content of your own choice, and to present it in your own format.

- **When creating a structured content asset**, you enter the content directly into a form (as explained earlier). The fields impose content structuring by prompting you for specific information—for example, a headline, a byline, and body text (as shown in the inset).

  When the content is published, its format and layout (predetermined by site designers) are implemented in the template that you choose to render the content.

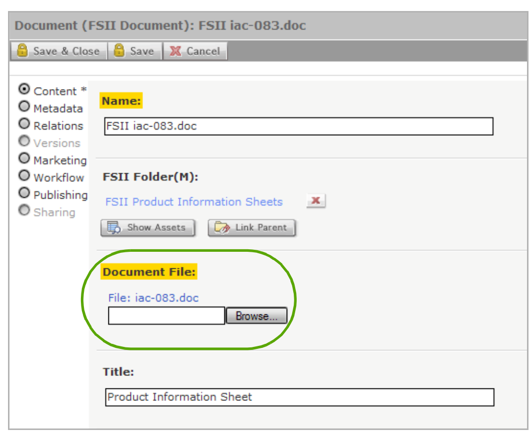
Structured Content Asset



- **When creating a document asset,** you enter content into a file of the format of your choice (a Word document in this example), then attach the file to the document asset. Optionally, you enter information describing the content, such as name, file size, format, or associated keywords, into the additional fields that developers might have created to help you describe the file and its content.

  CS-DocLink, an extension to Windows Explorer, provides an easy way to create and manage document assets outside the CS interface. See "Creating a New Asset in CS-DocLink," on page 83 for more information. To find out if your system is set up to support the CS-DocLink client, contact your administrator. Depending on how your site is designed by developers, you might encounter assets that accept both structured and document-based content – for example, an "Article" asset that accepts an image file to accompany the article text. You will provide both types of content when creating or editing such assets.

Document Asset



Multilingual Assets

If your organization maintains localized sites for different geographic regions, each piece of content you create is likely to be translated into languages other than the one in which the content was originally created.

Content Server allows you to assign a locale designation to each asset, and to group together assets that are translations of one another. This way, you can easily track, manage, and publish multiple translations of your content.

For example, a global press release written in English can be translated into French, Spanish, and German, and the translations published on the respective regional sites. The press release and its translations exist in the Content Server database as separate assets, linked with each other into a multilingual set. Members of multilingual sets can be managed, passed through workflow, approved, and published to one or more destinations just like their non-localized counterparts.

On the other hand, you are free to create assets in different languages and assign locale designations to them independently of one another, without creating the translation links. For example, you would treat in this way content that is specific to one region only and should not be translated nor published elsewhere.

When configuring your site for multilingual support, your developers provide the site visitors with a way to specify their preferred language (or languages). The delivery system then determines (by checking which locales are enabled for the site, and through locale filtering, if applicable) which translation of each asset is displayed on the online site.

Design Assets

Structured content assets are called **design assets** if they are used to format and organize web site content. Design assets are created by developers for your use. Your access to design assets depends on which design assets were created and on the permissions granted to you by your CS administrator. The following list describes the design assets you can use (given the appropriate permissions).

- **“Template” assets** create the look and feel of the web site. As a content provider, you assign “Template” assets to structured content assets to apply specific formatting to your content. Each “Template” asset formats assets of a specific type. Consult your site developers for instructions on how to work with the “Template” assets available to you.
- **“Page” assets** are “containers” that reference the assets constituting a page (or a portion of a page) in the online site; they provide the structure and organization for the displayed content. You can inspect and preview “Page” assets by invoking them from the **Site Plan** tree, the **Asset Tree**, or a list search results.

  If you have the appropriate permissions, you can add, edit, remove, and position content directly on a rendered page using the InSite interface, assuming your site and assets support InSite functionality. (For more information, see Chapter 6, “Working with the InSite Interface.”)

Content Server’s Data Models

Asset data models define how content is stored in the Content Server database—in either a flat (single-level) or hierarchical (multi-level) structure. In Content Server, the flat model is referred to as the basic model, and the hierarchical model as the flex model.

The data model is chosen by the developers during asset type creation to suit site design requirements. In most of your tasks as a content provider, the distinction between the asset models is not relevant, since the majority of the functions you perform in Content Server are the same whether you are working with basic or flex assets. This guide indicates when a function or situation is unique to either basic or flex assets. Consult your administrator to determine the assets model(s) used on your site.

Basic vs. Flex

The differences between the basic and flex asset models are summarized below:

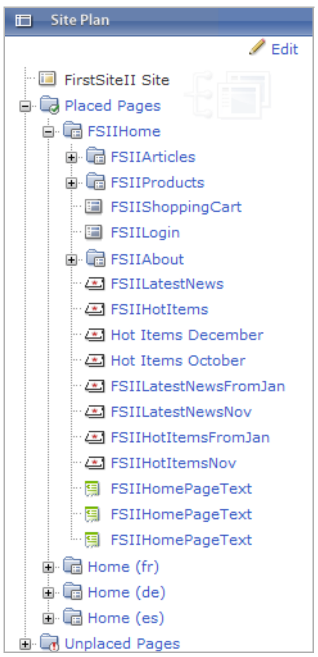
- **Basic assets** are instances of basic asset types and always have the same set of properties (attributes), as defined by the asset type. They can be associated with other assets to form single-level "parent-child" dependencies, but they cannot inherit each other's properties. Thus, no complex hierarchies can be created with the basic asset model.
- **Flex assets** have the ability to inherit structure and content from multiple parents and grandparents, which makes them excellent for building complex hierarchical data structures (for example, creating large online catalogs of products). Unlike basic assets, flex assets in a given flex family can have different properties (attributes) based on the established hierarchy and inheritance rules set up by the administrator. For more information, see Appendix A, "The Flex Asset Model."

Content Management Sites

A content management (CM) site is the backend for the online site or one of its sections, and like everything else in Content Server, it is stored in the CS database. A CM site is the structural and logical framework that references several types of information:

- A CM site references all of the assets, asset types, and asset relationships that constitute the actual online site (or a section of it).

  You can view a hierarchical representation of the site design for the CM site you are logged in to by clicking the **Site Plan** bar in the navigation pane. For example, a section of the site plan for the FirstSite II sample site looks like this:

  Notice the hierarchical structure in which the content is organized.

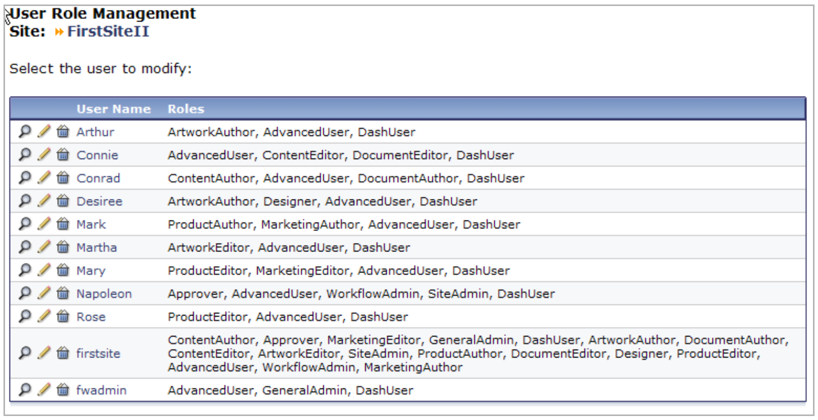
- A CM site also references the users, roles, and workflow processes used to manage and organize the site's content. The CS administrator is responsible for managing these objects. Which CM sites you can work with is determined by the permissions granted to you by the CS administrator.

  If you have permissions to work with more than one site, a site select screen appears when you log in to Content Server, allowing you to select the CM site you want to work with. You can also switch between CM sites during your session using the "Currently logged into:" drop-down list at the top left of the Dash interface.

  Once you are granted access to a site, the administrator also grants you permissions to perform specific tasks within the site. For example, you may have the permissions to edit assets but not delete them.

The FirstSite II sample site has a number of users holding different sets of permissions to functions (such as searching or editing assets) and specific types of assets, as shown in the following figure:

This list is available only in the Advanced interface and only to administrators.



User Role Management
Site: FirstSiteII

Select the user to modify:

User Name	Roles
Arthur	ArtworkAuthor, AdvancedUser, DashUser
Connie	AdvancedUser, ContentEditor, DocumentEditor, DashUser
Conrad	ContentAuthor, AdvancedUser, DocumentAuthor, DashUser
Desiree	ArtworkAuthor, Designer, AdvancedUser, DashUser
Mark	ProductAuthor, MarketingAuthor, AdvancedUser, DashUser
Martha	ArtworkEditor, AdvancedUser, DashUser
Mary	ProductEditor, MarketingEditor, AdvancedUser, DashUser
Napoleon	Approver, AdvancedUser, WorkflowAdmin, SiteAdmin, DashUser
Rose	ProductEditor, AdvancedUser, DashUser
firstsite	ContentAuthor, Approver, MarketingEditor, GeneralAdmin, DashUser, ArtworkAuthor, DocumentAuthor, ContentEditor, ArtworkEditor, SiteAdmin, ProductAuthor, DocumentEditor, Designer, ProductEditor, AdvancedUser, WorkflowAdmin, MarketingAuthor
fwadmin	AdvancedUser, GeneralAdmin, DashUser

It is important to note that a CM site is not synonymous with the online site that visitors see in their browsers. For example, a small web site might have all of its assets contained in one CM site. A very large web site, on the other hand, might be divided into several sections, each contained in and managed through a separate CM site. A Content Server CM site is thus the supporting structure behind the actual web site (or a section of it), but they are not one and the same.

Note

Throughout this guide, the phrase “current site” refers to the CM site you are logged in to at the time, and not the online site that the visitors access.

What Can You Do with Assets in the Dash Interface?

The Dash interface provides access to Content Server features listed in Table 1, on page 34. What you can do individually is determined by the role(s) granted to your user name by the administrator. If you do not have the right permissions, the function is unavailable to you — it is either grayed out, hidden from your interface, or it produces an error message when you attempt to use it.

Permissions to Assets

Permissions are the access privileges to functions such as creating, viewing, or editing assets; participating in a workflow; and approving assets for publication. They also determine which assets and asset types are available for you to work on. Permissions, are, thus, also responsible for the appearance of your Content Server interface. Your permissions are granted by your CS administrator, either directly, or through a workflow.

For example, the administrator may deny you the permission to create assets of a particular type; in such case, the asset type will not be displayed in the “Create New...” drop-down list or the “Quick Access” pane. You will also not be able to create new assets of that type by copying or creating translations of existing assets of that type.

If an asset is in a workflow, your permissions to the asset change depending on the workflow state the asset is in at the moment. For example, if you are not a participant of a particular workflow state, you cannot work with assets in that state.

Selecting Page Content

As a content provider, you may be responsible for associating (through the InSite interface) content you want to display on a particular page on the online site with the appropriate “Page” asset. “Page” assets are “containers” that reference all of the assets constituting each section of the online site; they are created for you by site developers as a way of organizing content on the rendered page.

Before you can select the correct content for your “Page” assets, you must be familiar with how your site is structured and what the “Page” and “Template” assets available to you are designed to do. Because of that, site developers, who create the “Page” assets you work with, usually provide instructions on how to work with the page and “Template” assets available to you.

When the “Page” assets are rendered into online pages, Content Server uses the templates assigned to each asset referenced by the “Page” asset to apply the desired look and feel to the rendered content. The templates control which content goes where, how it is formatted, which buttons appear and what they do, and so on.

Dependencies

Dependencies are an important consideration for the content provider, because they govern how assets can be managed—for example, if (and in what order) assets can be deleted or approved.

Dependencies are relationships that exist among assets which have somehow been associated with each other. You associate assets with each other for the following reasons:

- To keep and publish, together, assets that must stay together – for example, a "Product" asset and the supporting "Image" and "Datasheet" assets. This ensures the integrity of your site by avoiding broken links and missing data.
- To avoid repetition and errors by sharing information among assets. When multiple assets share a piece of information, that information remains identical across the assets.

Depending on the asset model, relationships are either inherent to the data model (pre-defined by Content Server) or created by developers. In any case, the relationships are actualized at the asset level by content providers. For example:

- Developers can create a data model that hierarchically associates one type of asset with another. You then associate assets of those types when you create the assets. For example, you can associate a particular "Product" asset (such as an MP3 player) with a particular "Document" asset (such as an owner's manual in PDF format). The association creates a dependency.
- If your system is set up to use CS-DocLink, you can associate document assets with each other. For example, you create dependencies by attaching document assets to folder assets, and the folder assets to parent folder assets, and so on.

Whenever dependencies prevent you from performing a task, Content Server warns you of that fact and identifies the offending assets. You can then take appropriate actions to resolve the conflicts.

For example, if you try to delete an asset that is referenced by other assets, Content Server displays the list of assets referencing the asset you are trying to delete. You must first remove the reference that creates the dependency between the assets; only then can you delete the referenced asset. If a hierarchical relationship exists among multiple assets, you must remove the dependencies, starting at the bottom of the hierarchy. Content Server displays various messages to guide you through the process of deleting assets with dependencies.

Approving and Publishing Assets

As a content provider, your ultimate goal when using Content Server is to publish content to your delivery site. Before assets can be published, however, they must be approved.

Approving Assets

The purpose of approving assets for publishing is to ensure that both the parent assets and their dependent assets are approved before the assets are published. This safeguards against broken links on your delivery site.

Note

In some instances, unapproved assets are automatically published. For example, if a previously published asset is deleted from the content management system, it is automatically approved for publication to the delivery system as a "deleted" asset. When the next publishing session runs, the status of the asset is synchronized between the systems which results in the asset being deleted from the delivery system.

While certain asset dependencies are intrinsic, designers and administrators are responsible for establishing explicit dependencies.

An asset dependency exists when there is an association of some kind between assets. For example, a "Page" asset has an association with three "Article" assets; two of these articles have associations with "Media" assets, while the third one has associations with four "Document" assets. This tree hierarchy forms a set of parent/child dependencies among all these assets. Because of that, all of these assets must be approved before they can be published. Content Server displays an error message when assets cannot be approved for publication, listing the offending assets.

As a content provider, if you have approval permissions, your role is to resolve any errors that might arise during the approval process so that you can publish your content successfully. Content Server enforces the dependencies put in place by the design team and identifies conflicts so that you can resolve them.

For instructions on approving assets for publishing, see Chapter 11, "Approval for Publishing." For an in-depth explanation of Content Server's approval mechanisms, see the *Content Server Advanced Interface User's Guide*.

Publishing Assets

Assets that are approved for publishing are marked as such in the CS database until a publishing session is initiated. A publishing session can be either scheduled (on a one-time or recurring basis), or launched manually by the administrator or a content provider with the appropriate permissions. When a publishing session is running, every asset flagged as "ready to publish" is published.

Note that publishing is a background operation; you can continue to work in the Content Server interface while a publishing session is running. While the assets are being published, they can be previewed. However, they cannot be edited or deleted until the publishing session ends.

For an in-depth explanation of Content Server's publishing mechanisms, see the *Content Server Advanced Interface User's Guide*.

Users, Roles, and Workflow Assignments

In most organizations, people have different roles or responsibilities, and web sites are published by many people working together. Sometimes there are many people who perform the same role. Sometimes one person has more than one role. In Content Server, responsibilities are called **roles**, people are called **users**, and everyone has a user name, which they use to identify themselves and to log in.

Work moves from one person to another. For example, an author writes or assembles some text for an article and passes it to an editor. The editor makes suggestions and sends them back to the author along with the article, or makes changes and sends the article off for final review and approval. This process—the movement of content from one person to another in a predictable way—is called **workflow**.

You can assign a workflow process to an asset you create, but more typically, the administrator has already assigned workflow and set participants for the assets you are allowed to create, during the configuration of the workflow feature on your CS system.

When workflow is in use on your CS system, tasks and permissions are for the most part assigned to roles rather than user names. Although you log in with your user name, it is your assigned role that determines what you can do. (Hold your cursor over the **View** link next to the **My Roles** item in the "Quick Info" pane to see a list of your roles.)

When you log in to the Dash interface, the "Quick Info" pane shows you a snapshot of your current workload. To see all of the assets assigned to you, click the **Assignments** link in the "Quick Info" pane. (Alternatively, you can click the **My Assignments** tag in the **Tags** tree in the navigation pane).

If you know you will be unavailable, (such as going on vacation) you can delegate your assignment to someone else who has the same role as you. If you are unable to complete your assignment, you can relinquish your participation by using the **Abstain from Voting** function.

When you are done working with an asset, you indicate that you have finished your workflow assignment for that asset by using the **Finish My Assignment** function. Content Server then changes the asset's state and determines who gets the assignment next, according to the workflow process. For more information about workflow, see Chapter 12, "Workflow."

Revision Tracking

Content Server can track and recall changes made to assets. If your administrator has enabled revision tracking for a particular asset type, then you can do the following with assets of that type (for detailed information, see Chapter 13, "Revision Tracking"):

- Check out an asset, which prevents others from modifying or deleting it until you check it back in.
- Review the changes made to an asset.
- Restore an asset to a previous version (rollback).

Check In and Check Out

To work with an asset when revision tracking is enabled:

1. You check the asset out from the database.

   Keep in mind that an asset can be checked out to only one user at a time. This means that when an asset is checked out to you, only you can edit it, delete it, or assign it to a workflow. If you open an asset for editing without deliberately checking it out first, Content Server checks it out to you automatically.

2. After you have edited an asset, you check it back in.

   Checking in saves a new version of the asset, but does not overwrite the earlier versions stored in the CS database unless the maximum number of allowed revisions is reached (this limit is set by the administrator). When checked in, the asset becomes available for editing to other users. If you are working on an asset that was checked out to you automatically, Content Server checks it back in automatically when you save the asset.

Archive Options

You can check in an asset so you have an archived version saved, but keep it checked out to continue your work on it.

Cancelling Checkout

If you check out an asset and then decide that you do not want to save the changes you just made to it, or if you checked an asset out by mistake, you can undo the checkout. In such cases, Content Server does not store a new version of the asset nor make a record of the checkout in the database.

Rollback with Revision History

If, after saving an asset, you decide you do not want to keep the changes you made to it, you can roll the asset back to any of its stored previous versions by using the **Rollback** function. When you have an asset checked out, you can roll it back to any previous version. If you try to roll back an asset that is checked in, CS checks it out to you automatically. You or any user can examine the asset's revision (version) history.

Features in the Dash Interface

Table 1 provides an overview of the features available in the Dash interface. It also shows which features are exclusive to either the Dash or Advanced interface.

Table 1: Features comparison

Feature	Dash	Advanced
Administrative Controls		
Perform administrative tasks		✓
Asset Model		
Work with basic assets	✓	✓
Work with flex assets	✓	✓
Editorial Functions		
Create and copy assets	✓	✓
Create dependent assets from asset's edit screen	✓	
Edit assets	✓	✓
Delete assets	✓	✓
Finding Assets		
Perform simple searches	✓	✓
Perform advanced searches	Powered by Lucene search engine	Form-based search
Sort search results	✓	
Save search criteria		✓
Save search results	✓	✓
Attribute value search	✓	Pre-defined attributes only
Visually browse a site's structure (site plan)	✓	✓
Visually browse flex family hierarchies	✓	✓
Organizing Assets		
Work with tags	✓	
Work with the Active List		✓
Share assets across sites	✓	✓

Table 1: Features comparison *(continued)*

Feature	Dash	Advanced
WYSIWYG Editors		
Work with FCKEditor	✓	✓
Work with eWebEditPro		✓
Work with the DatePicker	✓	✓
Work with the Image Picker	✓	✓
Work with the Clarkii Online Image Editor (Clarkii OIE)	✓	✓
Work with Flash content	✓	✓
Site Preview		
Set start/end dates when assets can be previewed.	✓	✓
In search results lists, view an asset's start/end date.	✓	✓
InSite Interface		
Preview assets as they will appear at the current time	✓	✓
Preview assets as they will appear at a future date ("Site Preview")	✓	✓
Edit assets ("Editing" mode)	✓	✓
Add, replace, remove, and position assets on a page ("Page Builder" mode)	✓	✓
Finish workflow assignments	✓	✓
Search for assets	✓	✓
View asset's start/end date and description in a tooltip (in search results lists and Page Builder lists)	✓	✓
Asset Associations		
Associate assets with other assets	✓	✓
Assign templates to assets		✓
Assign assets to pages		✓
Work with collections		✓
Place and unplace pages		✓

Table 1: Features comparison *(continued)*

Feature	Dash	Advanced
Linking Assets using FCKEditor		
Create a hypertext link to another asset	✓	✓
Link two assets by inclusion	✓	✓
Link two assets via an image asset	✓	✓
Link two assets via “Image Picker”	✓	✓
Link two assets (by hypertext link) by creating the target asset during the linking process	✓	✓
Link two assets (by inclusion) by creating the target asset during the linking process	✓	✓
Create an unmanaged link to a URL	✓	✓
Create a managed link to a URL (work with “Link” assets)		✓
Embedding Links		
Note: Applies to standard text fields and fields enabled with a supported WYSIWYG editor other than FCKEditor.		
Embed links to other assets	✓	✓
Embed contents of other assets by reference	✓	✓
Embed links to external web sites	✓	✓
Work with “Link” assets		✓
Multilingual Assets		
Assign locale designations to assets	✓	✓
Work with linked translations of content	✓	✓
Compare translations	✓	
Workflow		
Pass assets through workflow	✓	✓
Work with workflow groups		✓
Work with workflow reports		✓
Engage		
Work with segments		✓
Rate assets for segments	✓	✓
Work with promotions		✓
Work with recommendations	List mode Static Lists only	✓

Table 1: Features comparison *(continued)*

Feature	Dash	Advanced
Publishing		
Approve assets for publishing	✓	✓
Remove assets from the publishing queue	✓	✓
Publish assets		✓
Monitor and manage publishing sessions		✓
Revision Tracking		
Track revisions to assets	✓	✓
Roll assets back to previous versions	✓	✓
Working with Miscellaneous Assets		
Create, modify, and delete design assets: Template assets Link assets Query assets Collection assets DimensionSet assets Dimension assets LinkSet assets		✓

Part 2

Working in the Dash Interface

Assets are objects that serve as the building blocks of Content Server. They can be created, edited, inspected, deleted, duplicated, translated, assigned to workflow, tracked through revision tracking, searched for, previewed, and approved for publishing. Although there can be many different types of assets, you work with all of them in similar ways, using the same procedures.

This part describes how to use Content Server's Dash and InSite interfaces to perform simple and advanced asset management tasks. It contains the following chapters:

Chapter 2

Getting Started

This chapter describes how to log in to and use Content Server's Dash interface.

It includes the following sections:

Logging In

Follow instructions in this section to log in to Content Server's Dash interface.

To log in to the Dash interface

1. Open your browser and enter the Content Server URL.

Note

- If you need login information, see your Content Server administrator for the following: Content Server URL, your user name and password, and the list of supported browsers.
- To more easily follow the steps in this guide, you can log in to the sample site (FirstSite II) that is used throughout to illustrate Content Server. In step 2, use the following credentials:

User Name: firstsite
Password: firstsite

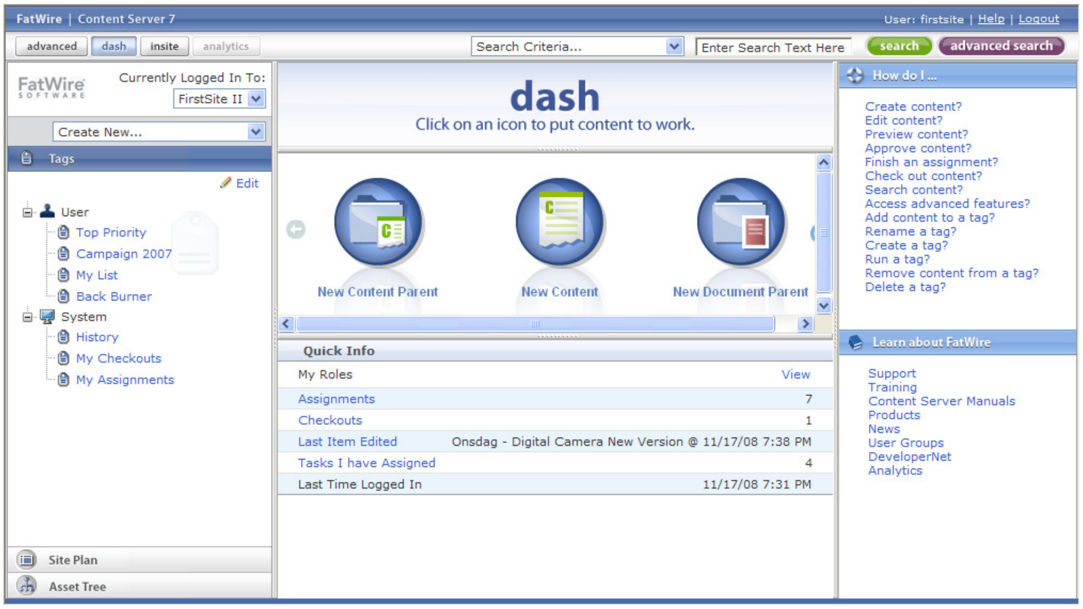
The login form that is displayed to you depends on whether FatWire Web Experienced Management (WEM) Framework is installed on your Content Server system.

If WEM is not installed,
then the Dash login form appears:

If WEM is installed,
then the WEM login form appears:

2. Log in to Content Server:
   a. If available, select a site to work with from the **Select Site** drop down list.
   b. Enter your user name and password into the login screen.
   c. If you want Content Server to store your user name and enter it automatically the next time you log in, select **Remember my username**.
   d. Click **Login**.

The Dash interface loads.



3. Proceed to the "Quick Tour," on page 48.

Choosing a Login Site

Sometimes the list of sites displayed in the Select Site drop down list is unavailable or displays sites not associated with your user name. If WEM is installed on your Content Server system, then you will not see the Select Site drop down list at all. In these cases, follow the directions below to select a site.

When the Site List is Unavailable

The site list on the login window is stored in a browser cookie.

Select Site List
This list may be grayed out.

The list, therefore, is unavailable (grayed out) if you:

- Are logging in for the first time,
- Are logging in from a computer you have not used previously, or
- Have recently cleared the browser cookies.

If you are working with a Content Server system where FatWire Web Experience (WEM) Framework is installed, the **Select Site** drop-down list is not displayed.

To log in when the site list is grayed out

1. Open your browser and enter the Content Server URL.

   The login form that is displayed to you depends on whether WEM Framework is installed on your Content Server system.

If WEM is not installed,
then the Dash login form appears:

If WEM is installed,
then the WEM login form appears:

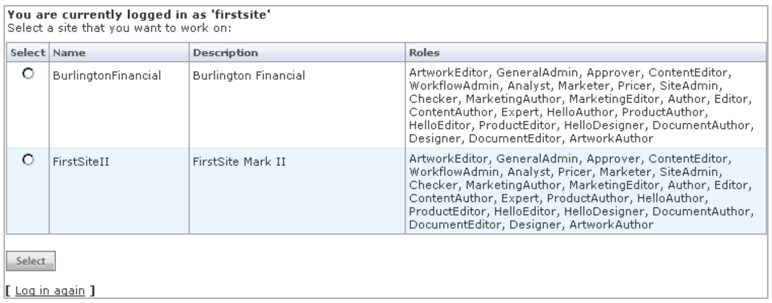
2. Log in to Content Server:
   a. Enter your user name and password into the login screen.
   b. If you want Content Server to store your user name and enter it automatically the next time you log in, select **Remember my username**.
   c. Click **Login.**

      A list of sites which you can work with opens.

Heading Row

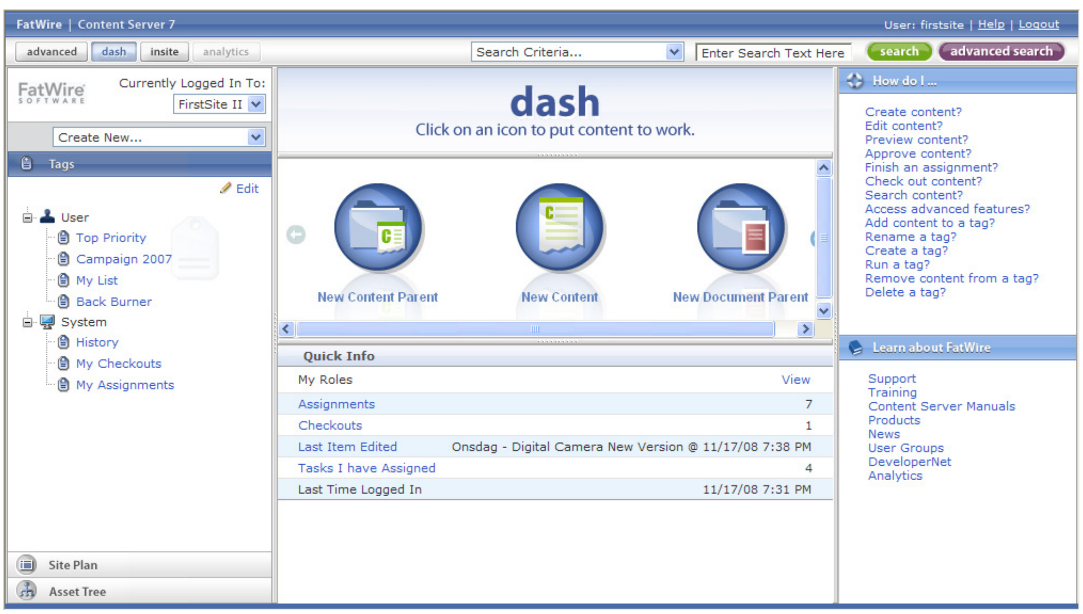
Click a column heading to sort the list alphabetically by the selected criterion.

To reverse the sort order, click the same column heading again.



3. Select the site you wish to work with and click **Select**.

   The Dash interface loads.



4. Proceed to the "Quick Tour," on page 48.

When the Site List Displays Sites Associated with Another User

The site list on the login window is stored in a browser cookie. Therefore, if you log in with a different user name than you provided on your previous successful login, you will see the list of sites associated with the last user name.

Select Site Drop Down List
This list may be incorrect.

To log in when the site list displays sites associated with another user

1. Open your browser and enter the Content Server URL.

   Content Server's login window:

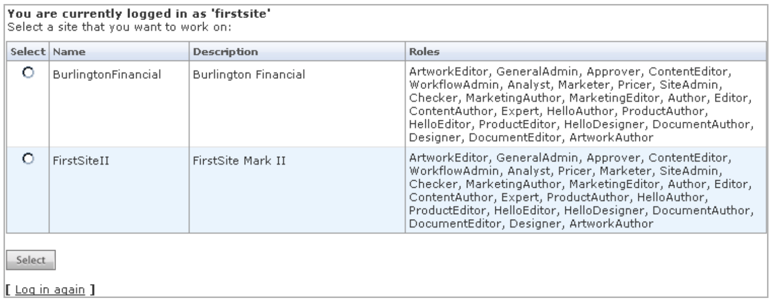
2. Log in to Content Server:
   a. Enter your user name and password into the login screen.
   b. If you want Content Server to store your user name and enter it automatically the next time you log in, select **Remember my username**.

c. Click **Login.**

A list of sites which you can work with opens.

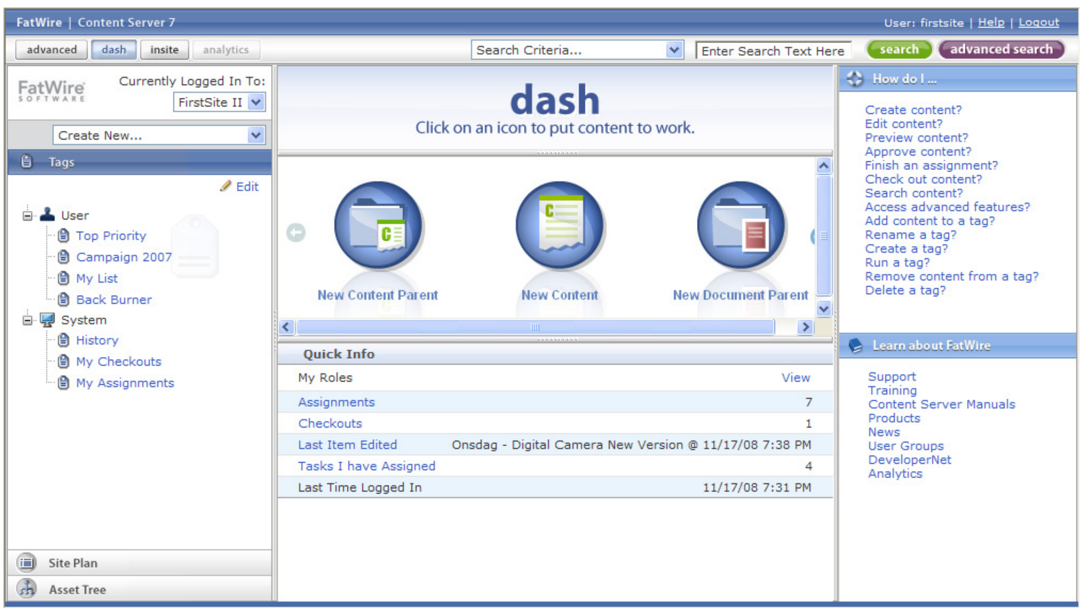
Heading Row

Click a column heading to sort the list alphabetically by the selected criterion. To reverse the sort order, click the same column heading again.



3. Select the site you wish to work with and click **Select**.

The Dash interface loads.

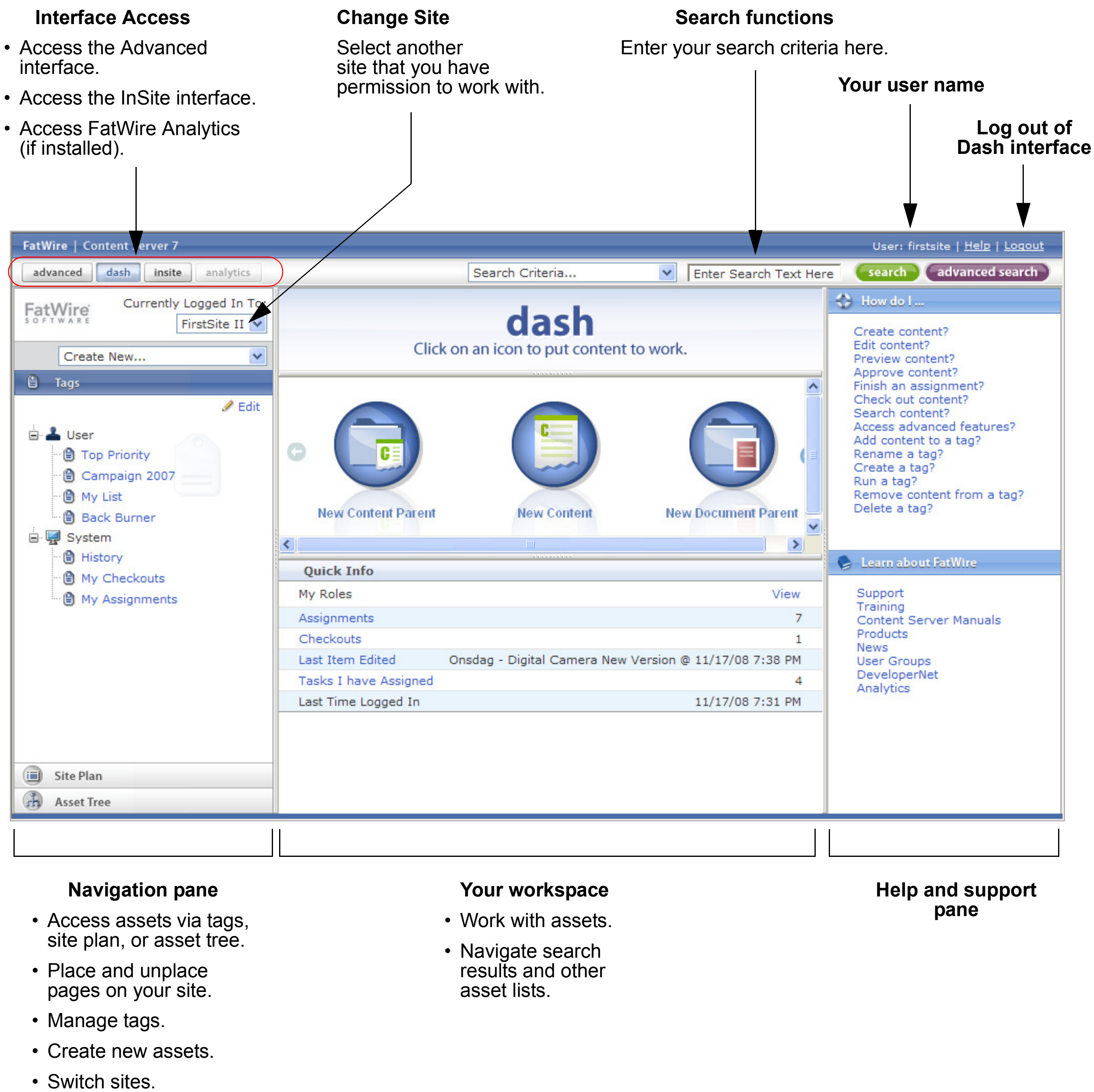


4. Proceed to the "Quick Tour," on page 48.

Quick Tour

Figure 4 shows the Dash interface home view, displayed to you on login.

Figure 4: The Dash interface home view.



If you perform an action, the view will change. For example, if you perform a search, the workspace displays the results of your search; if you create a new asset, the workspace displays the appropriate asset form, and so on. This section provides a quick tour of the Dash interface.

> **Note**
>
> The exercises in this section, and throughout this guide, are based on the `firstsite` user logged in to the FirstSite II sample site. The `firstsite` user has all the permissions that a content provider can be granted. In your installation, the appearance of your interface will be determined by the permissions granted to you by the CS administrator (and the FatWire products installed on your system).

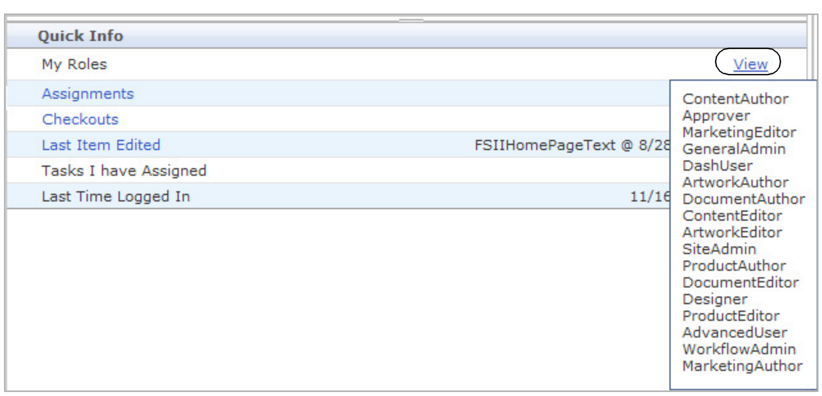
In this section, you will complete the following exercises:

- Determine your roles (step 1)
- Perform a search (step 2 on page 50)
- Open an asset (step 3 on page 51)
- Edit an asset (step 4 on page 52)
- Preview an asset (step 5 on page 53)
- Create a tag (step 6a on page 55)
- Enter split view mode (step 6e on page 55)
- Add an asset to a tag (step 6g on page 56)
- Run a tag (page 57)
- Log out (page 57)

Let's start the tour!

1. Determine your roles in the current site. In the "Quick Info" pane, hold your cursor over the **View** link displayed in line with the **My Roles** item to show a list of roles:

Click any of these links to open up a list of these items.



A role is a set of permissions assigned to you by the administrator. These permissions determine which tasks you can perform and which assets you can work with. Because of this, they also determine the appearance of your interface.

For example, if you have the Editor role, you have the permissions to create, edit, and search for assets of one or more asset types, and therefore, you have access to the interface elements that allow you to perform those functions (for example, the "Create New..." drop down list, or the **Search** field in the top bar).

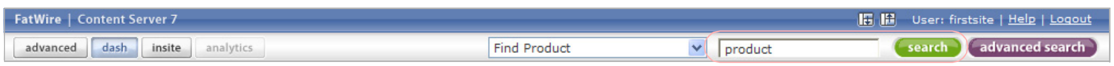
You might also have access to workflow features such as finishing your assignment or approving content for publishing; again, your roles determine which workflow-related interface elements you can access.

Note

Your administrator determines the exact permissions assigned to each role on your system. The roles and permissions described in this section are examples only.

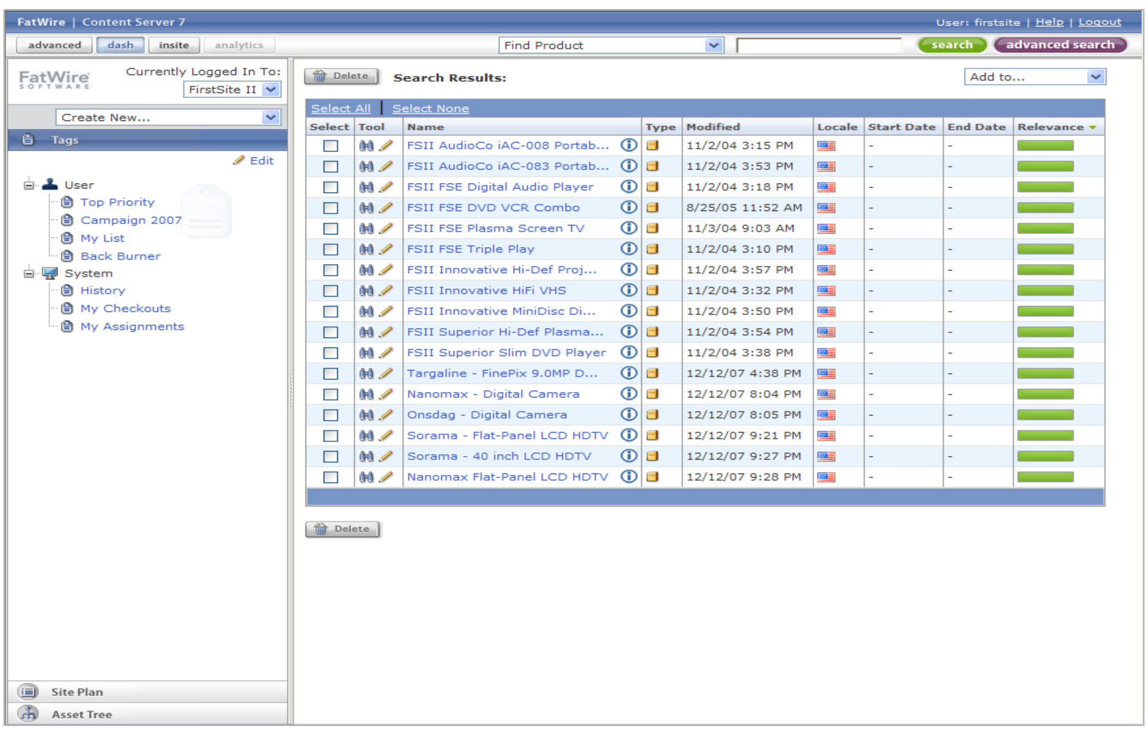
2. In the Dash interface, most asset management functions are accessible with a single click. Let's say you want to find an asset that contains the word "product":

a. In the **Search** field in the top bar, enter **product**.



b. (Optional) If you want to limit your search to a specific asset type, select that asset type from the "Search Criteria" drop-down list (**Find Product** in our example). If you want to search across all asset types, do not select anything from the list.

c. Click **Search**. Content Server displays a list of assets matching your search criteria.



Search results pane

The search results list shows a brief amount of information about each item on the list, such as name, modification and start and end date. When an icon is displayed instead of text, hover over the icon to view more information in a tool tip. By default, the search results are sorted by relevance (indicated by a green bar in the "Relevance" column), starting with the most relevant asset.

d. Click a column heading to sort the search results by the selected criterion. To reverse the sort order, click the same column heading again.

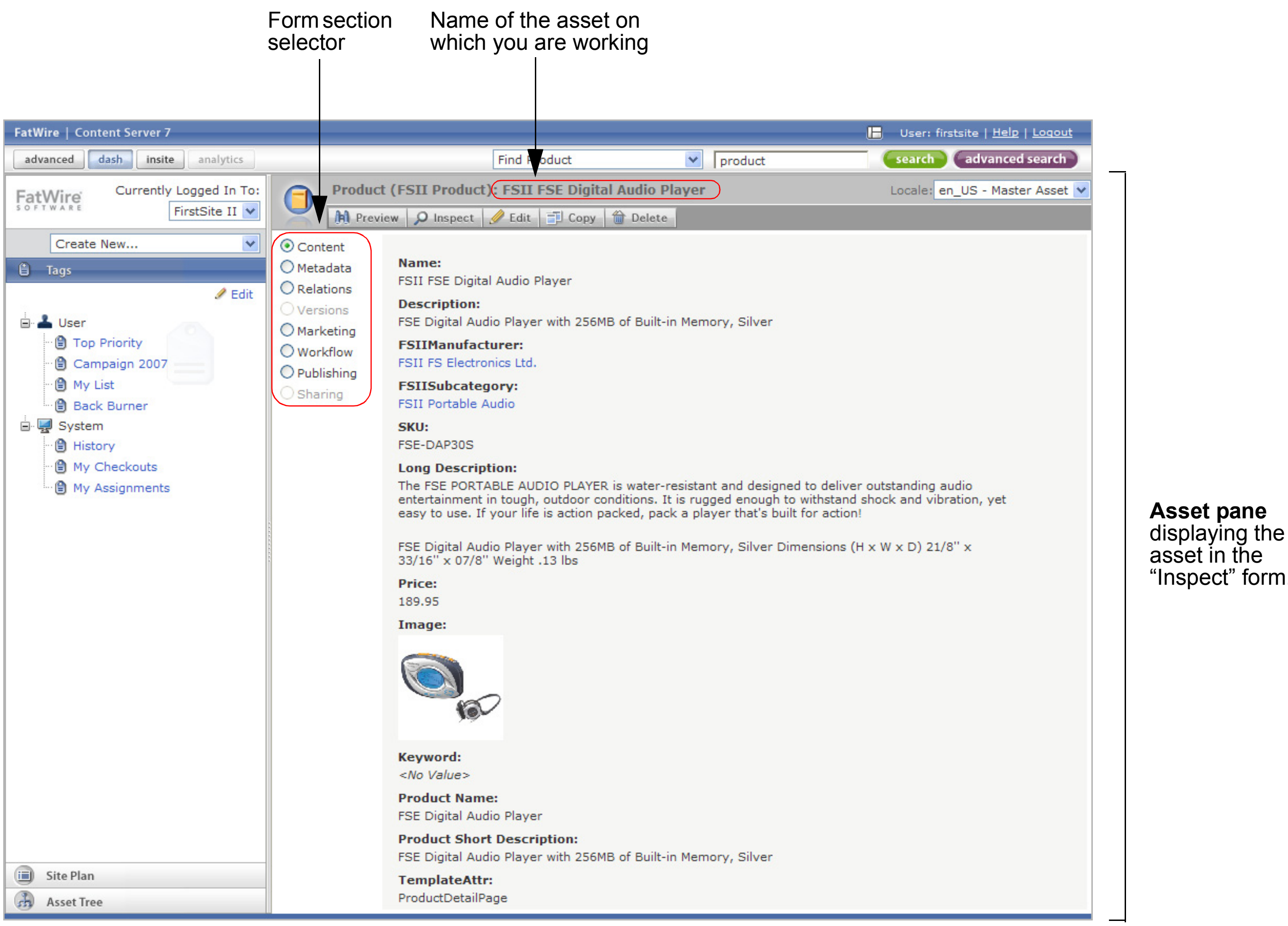
e. Click **Next** at the top right of the search results list to go to the next page of results; click **Previous** to go to the previous page.

To find out more about searching for assets, see "Finding and Organizing Assets," on page 101.

3. When you have reviewed your search results, open the asset you are interested in:

a. In the list of search results, click **FSII FSE Digital Audio Player**.

The workspace displays the asset pane, showing the asset in the "Inspect" form.



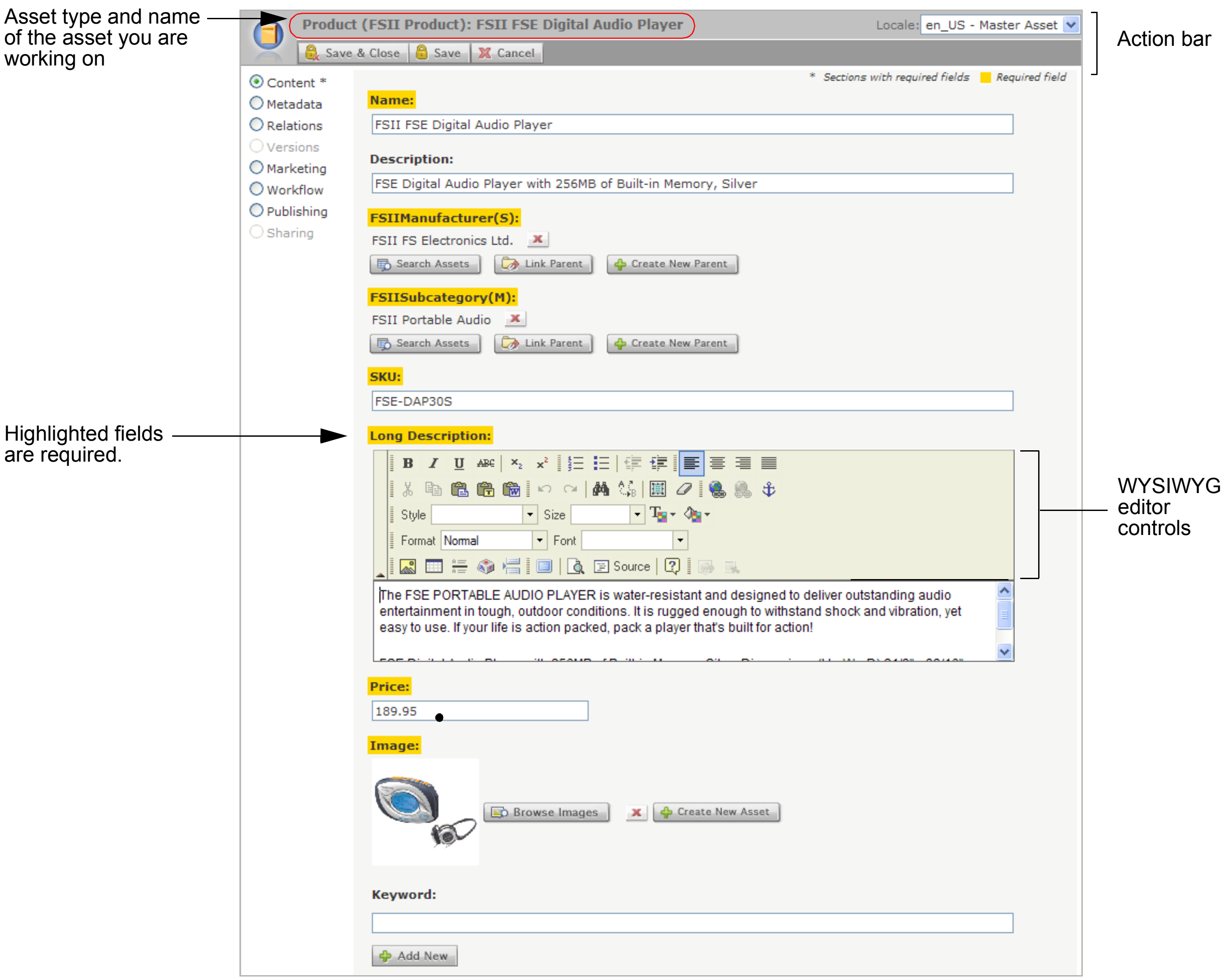
b. Inspect your asset, and any information relating to it, by selecting different sections of the form. When you are finished, return to the **Content** section.

For more information, see "Asset Pane," on page 72.

4. Suppose you found some errors in the content and want to correct them. To do that, edit the asset:

   a. Click **Edit** at the top of the "Inspect" form.

   Content Server opens the asset in the "Edit" form.



The asset type and name of the asset you are working on is displayed in the action bar.

b. Make changes to the contents of the **Name** and **SKU** fields.

   Note that fields whose names are highlighted in yellow are required, which means you cannot leave them blank. If you leave a required field blank, Content Server will not let you save the asset.

   > **Note**
   >
   > Depending on how your site is set up, one or more fields in your "Edit" forms might be WYSIWYG-enabled. A WYSIWYG-enabled field allows you to apply MS Word-style formatting to your content right in the "Edit" form. For more information, see "Working with the FCKEditor," on page 86.

c. (Optional) Click **Save** to save your progress and continue working on the asset.

   When you click **Save**, Content Server saves the changes you have made to the asset so far, but keeps the "Edit" form open.

d. Click within the **Long Description** field to load FCKEditor. When FCKEditor appears, make changes to the displayed text. If you are familiar with Microsoft Word, explore the features available in FCKEditor – its functionality mimics that of Word.

e. Click **Save & Close**.

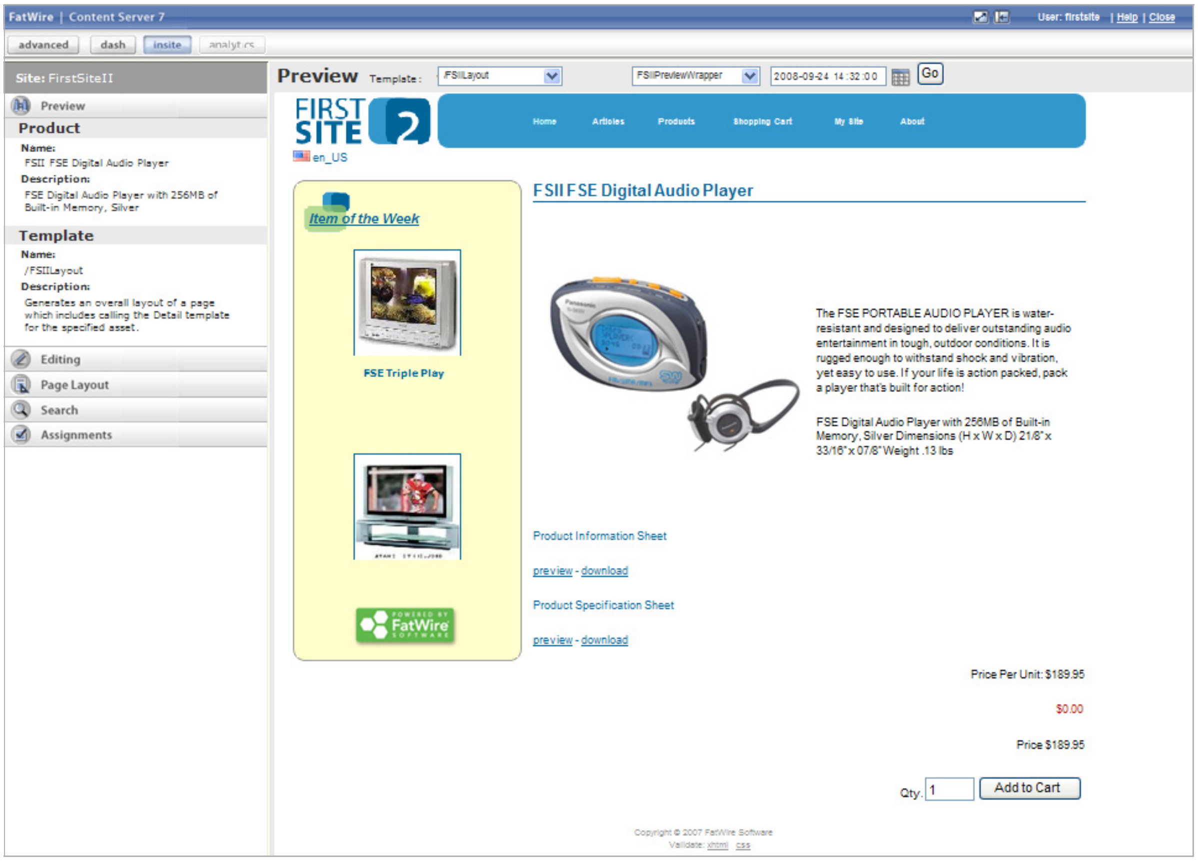
   Content Server saves the changes you have made to the asset and re-displays the asset in the "Inspect" form, showing the changes you have made to the asset.

5. When you are finished editing (or creating) an asset, preview it to see how it will look when rendered on the online site.

   > **Note**
   >
   > You can only preview an asset that has a template assigned to it. For more information, contact your site developers or CS administrator.

   a. In the "Inspect" form, click **Preview**.

A new browser window opens, showing the asset as it will appear on the online site.



b. In the preview window, review the content you have edited. Note any changes to the asset you still want to make.

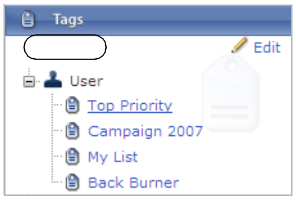
> **Note**
>
> Depending on how your site is set up, and the permissions you hold, you might have the ability to work with content directly on a rendered page using the InSite interface. See Chapter 6, "Working with the InSite Interface" for details.

c. Close the preview window and return to the Dash interface.

d. (Optional) If you need to make additional changes to the asset, click **Edit** and make your changes. When you are finished, click **Save & Close**.

6. If your search results contain one or more assets you want to come back to later, you can add those assets to a tag. Tags allow you to create personalized lists of assets which you can easily retrieve later.

a. In the **New Tag** field in the navigation pane, click **Edit**.



The Create/Edit/Delete Tags pane opens.

b. In the **Create/Edit/Delete Tags pane**, click **New**.

A new line is added to the tags table with a blank text box in the "Edit Labels" column.

c. In the **Create/Edit/Delete Tags** pane, type **My Products** in the empty text box and click **Save**.

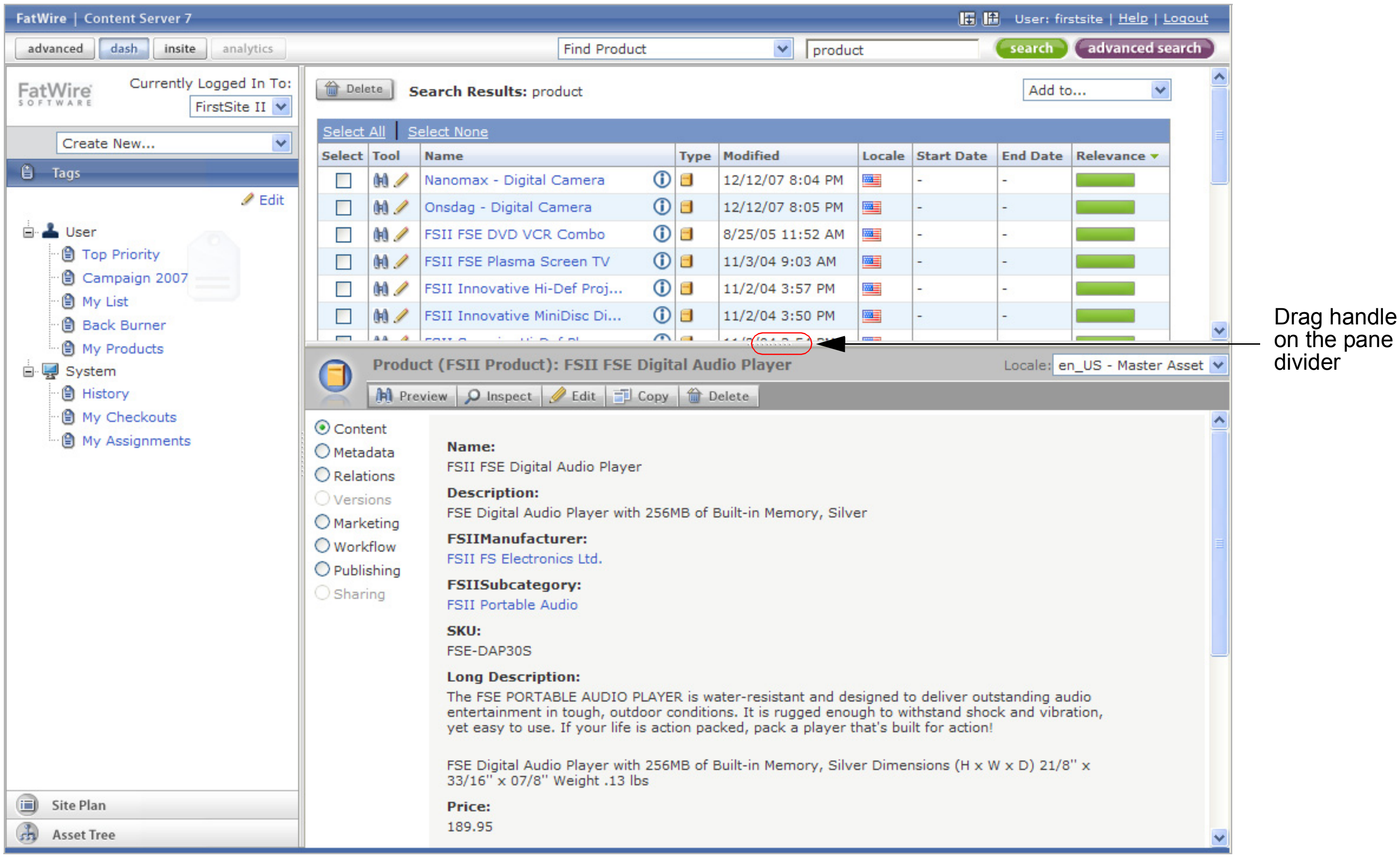
The new tag is created.

d. "Product" should still be entered in the Search text box. Click **Search** to run the search again.

The search results list displays in the workspace.

e. Click the **Show Split Pane** button in the right-hand section of the top bar.

The workspace displays the search results pane above the asset pane.



Tip

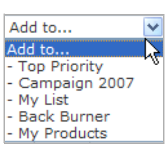
Drag the pane divider up or down to adjust the size of the panes.

See "Workspace: Asset Management View," on page 68 for details on split mode.

f. In the search results list, select the check boxes for the following assets:

- **FSII FSE Digital Audio Player**
- **FSII FSE DVD VCR Combo**

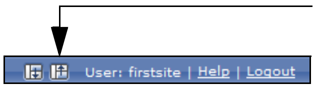
g. In the **Add to...** drop down list at the top right of the search results pane, select **My Products**.



Content Server adds the selected assets to the **My Products** tag.

h. Click the **Show Asset Pane** button (in the right-hand section of the top bar) to hide the search results and expand the asset pane across the entire workspace.

Show Asset Pane button



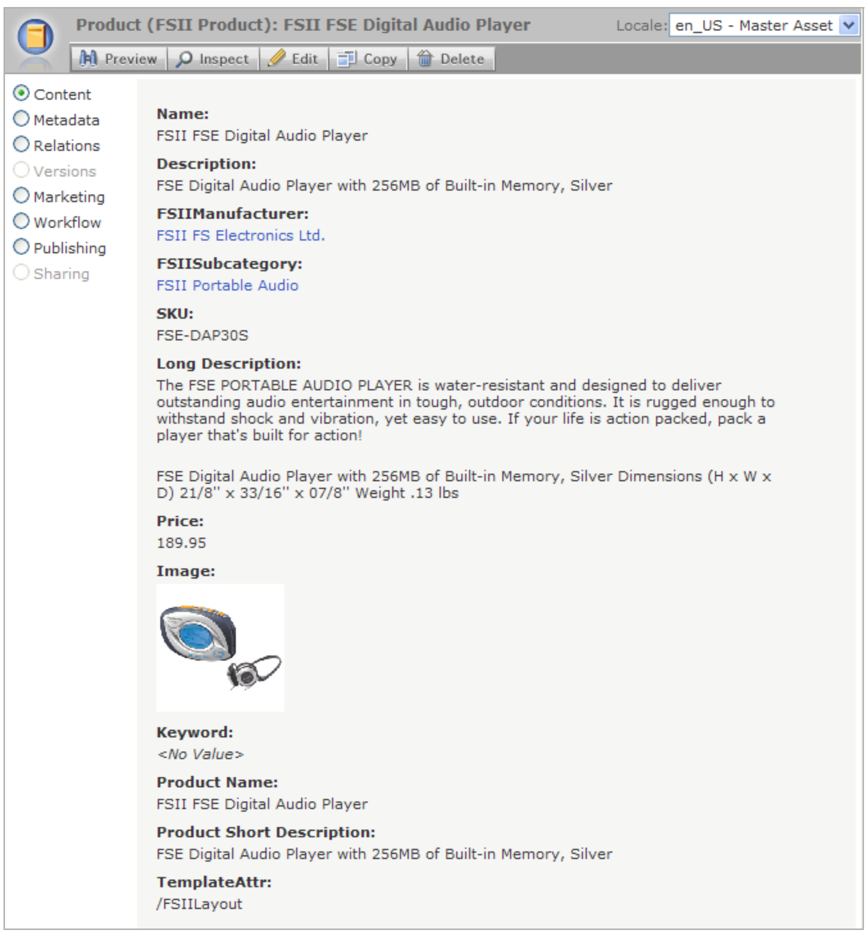
7. If you want to work with an asset assigned to a tag, run the tag and select the asset from the list of returned assets:

   a. Select the **My Products** tag in the **Tags** tree.

      Content Server displays a list of assets returned by the tag in the top pane.

   b. In the list of returned assets, click **FSII FSE Digital Audio Player**.

      The workspace displays the inspect asset pane. The asset pane shows the asset in the "Inspect" form.



   c. Edit and save the asset the same way you have learned earlier during the tour.

8. When your work is complete, click **Logout** in the right portion of the top bar to end your session and log out of Content Server.

Congratulations! You are now familiar with asset management tasks that you will be performing every time you work in the Dash interface. Log back in and continue on to the next sections to learn more about the interface and its features.

Additional Ways of Accessing Assets

In addition to performing a search and running a tag, you can also access assets using one of the following methods:

- Accessing Assets Using the Site Plan Tree
- Accessing Assets Using the Asset Tree

Accessing Assets Using the Site Plan Tree

The **Site Plan** tree allows you to browse pages and assets that have been or will be published to your online site, according to the hierarchy in which they are organized on the site. The tree helps you visualize the configuration of pages and their contents as well as understand the relationships and dependencies that exist for any given page. Placing and organizing pages on your site is usually the responsibility of your site designers.

> **Note**
>
> Which assets you see and are able to access through the tree is determined by the permissions granted to you by your CS administrator.

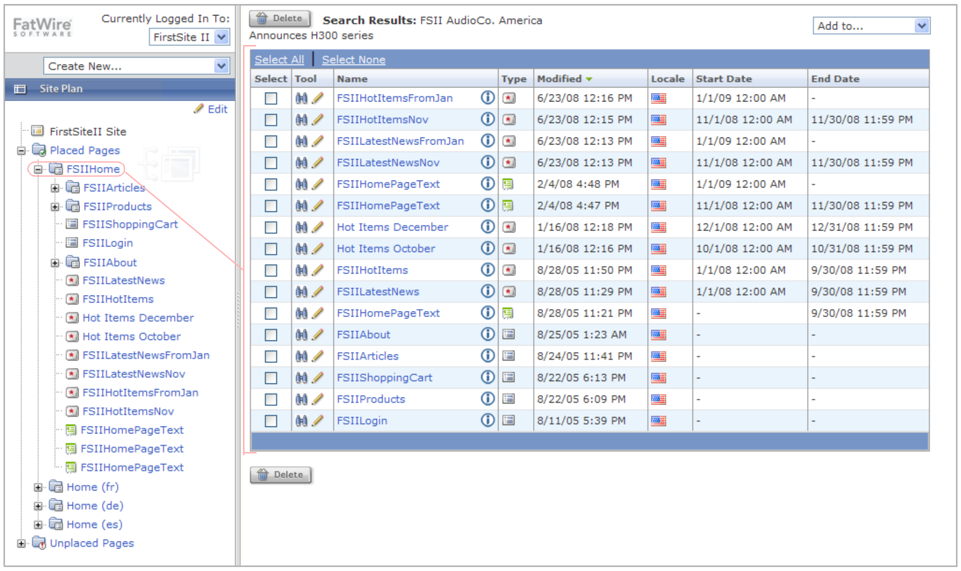
To access assets using the site plan tree

1. Log in to the site you want to work with.
2. In the navigation pane, click the **Site Plan** bar.

   The navigation pane displays the site plan tree.
3. Navigate the site plan by doing the following:

   a. **Drill down the hierarchy**. Click the plus sign next to a parent node to expand the node and display its children.

When you click a node on the tree, the workspace displays a list of assets associated with that node (such as child pages, content, and so on). For example, the following figure shows a list of assets associated with the **FSIIHome** page.



If the navigation pane is too narrow for you to see the entire tree, drag the divider between the navigation pane and workspace to widen the pane. You can also hover over any node in the tree to view a tooltip with the full name of the asset.

Continue down the hierarchy until you find the asset you want to work with.

b. **Open the desired asset**. In the tree or on the list of assets displayed in the workspace, click the asset you want to work with. Content Server opens the asset in the "Inspect" form.

Accessing Assets Using the Asset Tree

The asset tree allows you to visually browse the flex asset hierarchies present in your site.

> **Note**
>
> Which assets you see and are able to access through the tree is determined by the permissions granted to you by your CS administrator.

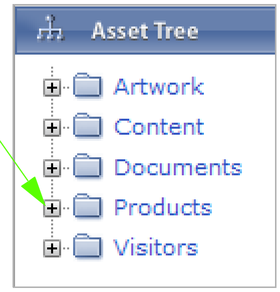
To access assets using the asset tree

1. Log in to the site you want to work with.
2. In the navigation pane, click the **Asset Tree** bar.

   The navigation pane displays the asset tree.
3. Browse the assets in the tree by doing the following:

a. **Drill down the hierarchy**. Click the plus sign next to a parent node to expand the node and display its children.

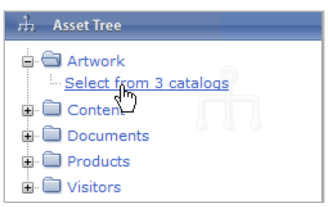
When you click a node on the tree, the workspace displays a list of assets associated with that node. For example, the following figure shows a list of child assets associated with the **FSII Portable Audio** asset.



Continue down the hierarchy until you find the asset you want to work with.

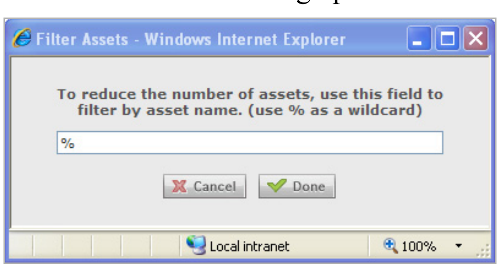
If the navigation pane is too narrow for you to see the entire tree, drag the divider between the Navigation Pane and Workspace to widen the pane. You can also hover over any node in the tree to view a tooltip with the full name of the asset.

b. **Search for an asset**: Sometimes when you click on a node, instead of the tree expanding to display every associated asset, you may see a link indicating the number of associated assets. For example:



Generally, this link is shown when a large number of assets is associated with the node. In this case, click this link to search for the asset you need.

The “Filter Assets” dialog opens:



1) Enter a search term to search across the asset names.

2) Click **OK**.

A search results list is returned.

c. **Open the desired asset**. In the tree, search results list, or on the list of assets displayed in the workspace, click the asset you want to work with. Content Server opens the asset in the "Inspect" form.

Accessing Common Functions from the Site Plan or Asset Tree

In both the site plan and asset tree, a right mouse button menu provides quick access to common functions.

To access common functions from the asset tree or site plan

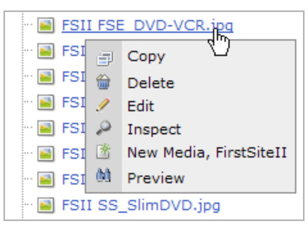
1. Log in to the site you want to work with.
2. In the navigation pane, click either the **Site Plan** or the **Asset Tree** bar.

   The navigation pane displays the appropriate tree.
3. Browse the assets in the tree and open the right-mouse button menu by doing the following:

   a. **Drill down the hierarchy**. Click the plus sign next to a parent node to expand the node and display its children.

   Continue down the hierarchy until you find the asset you want to work with.

   b. **Right-click the desired asset**. In the list of assets displayed in the workspace, right-click the asset you want to work with. Content Server opens a menu with common functions that you can perform on the asset: Copy, Delete, Edit, Inspect, Preview, and create a new asset of the same type as the selected asset. The example below shows the FSII FSE DVD VCR.jpg right mouse menu.



For more information on these functions, refer to the pages below:

- **Copy:** "Creating a New Asset by Copying an Existing Asset," on page 81
- **Delete:** "Deleting Assets," on page 98
- **Edit:** "Editing Assets," on page 84
- **Inspect:** "Asset Pane," on page 72
- **New:** "Creating Assets," on page 76
- **Preview:** "Previewing Assets," on page 128

Switching to Another Site

When working in the Dash interface, you can switch between the sites you have permissions to work in, without having to log out and back in.

To switch to another site

1. Log in to the site you want to work with.
2. In the "Currently logged in to:" drop-down list, select the site you want to switch to.

> **Note**
>
> The "Currently logged in to:" drop-down list contains only sites for which you have the appropriate permissions.

Content Server logs you in to the site you selected.

Accessing the Advanced Interface

If you have the appropriate permissions, you can access the Advanced interface (from the top bar) to perform the following tasks:

- Access Engage functionality (if Engage is installed), such as collections, recommendations, promotions, and segments.
- Perform advanced content management (and developer's) tasks, such as creating and editing template assets.
- Perform administrative tasks on your CS system (if you hold administrative privileges).

To learn more about the Advanced interface, see the *Content Server Advanced Interface User's Guide*.

To access the Advanced interface from the top bar

1. In the top bar, click **Advanced**.

   A new browser window opens and the Advanced interface loads.

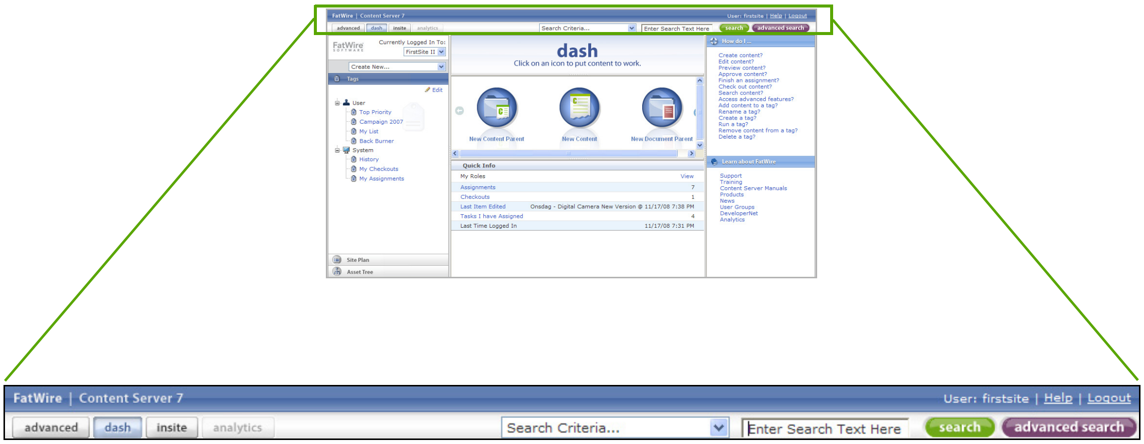
> **Note**
>
> - When you access the Advanced interface from the top bar, Content Server automatically logs you in to the current site.
> - If you do not have the permissions to use the Advanced interface, the new browser window displays an error message notifying you of that fact. If you have any questions, contact your CS administrator.

2. Perform the desired tasks.
3. When you are finished, close the browser window displaying the Advanced interface.

Quick Reference

This section provides a quick reference briefly explaining the functions of the most commonly used components of the Dash interface.

Top Bar



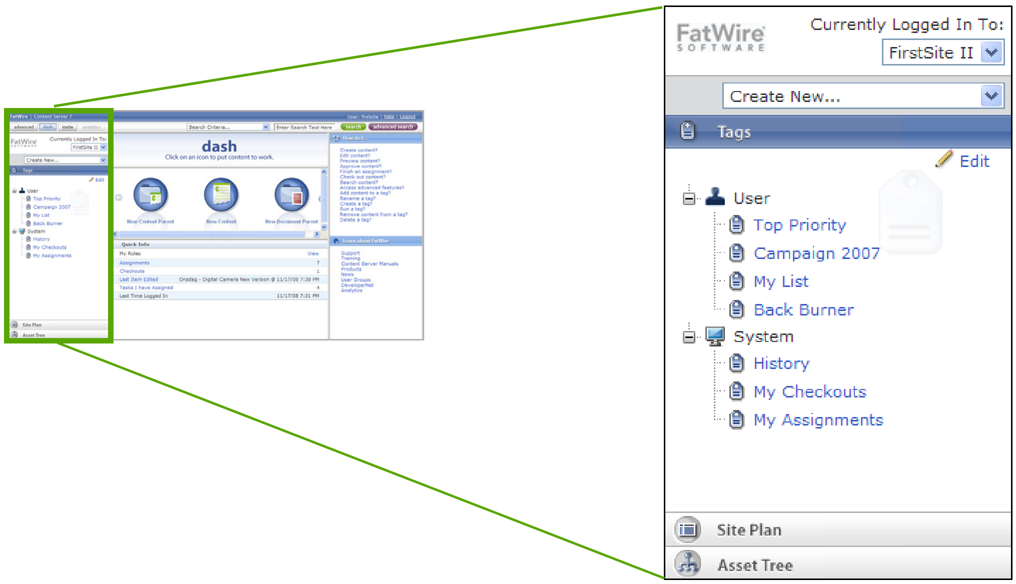
The top bar contains the following functionality:

- **Advanced**—opens Content Server's Advanced interface in a new browser window. See "Accessing the Advanced Interface," on page 62.

  The Advanced interface provides access to Engage functionality and administrative controls of Content Server. For information on working in the Advanced interface, see the *Content Server Advanced Interface User's Guide*.

- **Dash**—returns you to the home view. The home view is the view you see when you log in to the Dash interface. See "Workspace: Home View," on page 65.
- **InSite**—opens the InSite interface in another window. See "Working with the InSite Interface," on page 125.
- **Analytics**—if FatWire Analytics is installed, opens the Analytics interface in a new window.
- **User**—displays your user name.
- **Search** text box—allows you to perform a search on a term. See "Finding and Organizing Assets," on page 101.
- **"Search Criteria" drop-down list**—allows you to limit your search to a specific asset type. See "Finding and Organizing Assets," on page 101.
- **Advanced Search** button—opens the Advanced Search options, for searching by start and end date, modified date, asset type, and locale. See "Advanced Search Options," on page 106.
- **Help**—opens the FatWire Technical Support login page.
- **Logout**—ends your session and logs you out of Content Server.

Navigation Pane



Tip

Drag the right edge of the navigation pane to adjust the pane's width.

The navigation pane provides the following functionality:

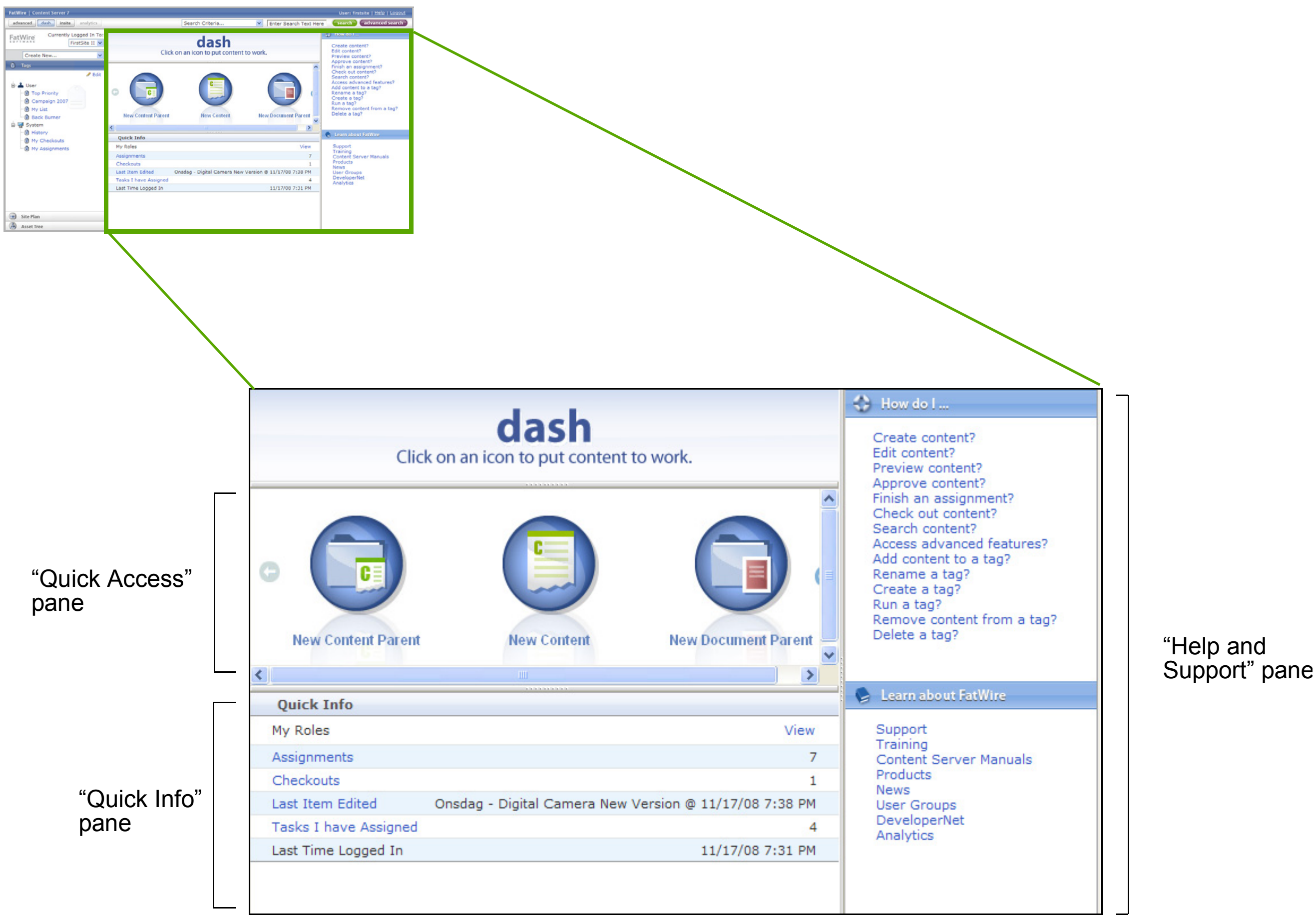
- **"Currently logged in to" drop-down list**—allows you to switch to another CM site, provided you have permissions to work in that site. (The default selection in this drop-down list is the site you are currently logged in to.) See "Switching to Another Site," on page 62.
- **"Create New..." drop-down list**—allows you to create new assets of the asset types available in the list. After you select the desired asset type, the "New" asset form for that asset type opens in the asset pane. Note that the contents of this list are determined by the permissions granted to you by the CS administrator. See "Creating Assets," on page 76.
- **Tags** tree—allows you to create, run, rename, and delete tags. See "Organizing Assets," on page 107.
- **Site Plan** tree—provides a hierarchical view of the way the pages and their associated assets on your site are organized, which helps you visualize the configuration of pages and their contents, and allows you to place and unplace pages in the site's hierarchy. The **Site Plan** tree also helps you understand the relationships and dependencies that exist for any given page. For instructions on navigating the site plan, see "Accessing Assets Using the Site Plan Tree," on page 58. For instructions on placing and unplacing pages, see "Parent Relationships," on page 161.
- **Asset Tree**—shows the assets available in the current site, organized according to their respective asset types and flex relationship hierarchies. For instructions on navigating the asset tree, see "Accessing Assets Using the Asset Tree," on page 59.

Workspace: Home View

The workspace is at the center of the Dash interface and displays either the home view or the asset management view. The home view is the view you see when you first log in to the Dash interface, as shown below.

> **Note**
>
> You can return to the home view at any time by clicking **Dash** in the top bar.

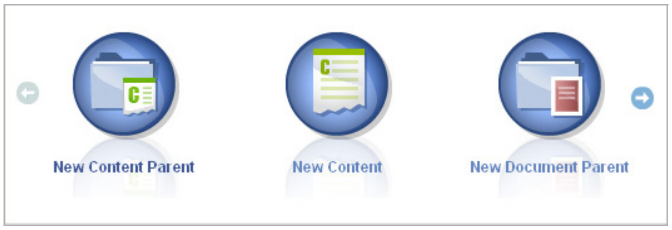
In home view, the workspace displays the following:



- **"Quick Access" pane**—provides shortcuts to creating assets from the asset types that you have permissions to create (permissions are set up by the administrator). For more information, see "Quick Access Pane," on page 66.
- **"Quick Info" pane**—provides a summary of your present workload in the current site, as well as other session-specific information. For more information, see "Quick Info Pane," on page 66.
- **"Help and Support" pane**—provides access to useful resources such as online help and the FatWire Support site (which displays links to the e-docs site). (Your administrator can customize the contents of this pane.)

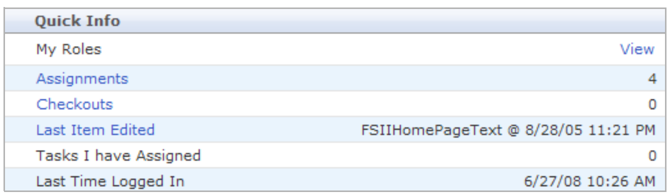
Quick Access Pane

The “Quick Access” pane provides shortcuts for creating new assets. Each asset type is represented by a unique icon, as shown below:



By default, the asset types available in the pane match the asset types available in your “Create New...” drop-down list. The CS administrator selects the asset types available to you in both locations.

Quick Info Pane



The “Quick Info” pane provides the following information about your current session:

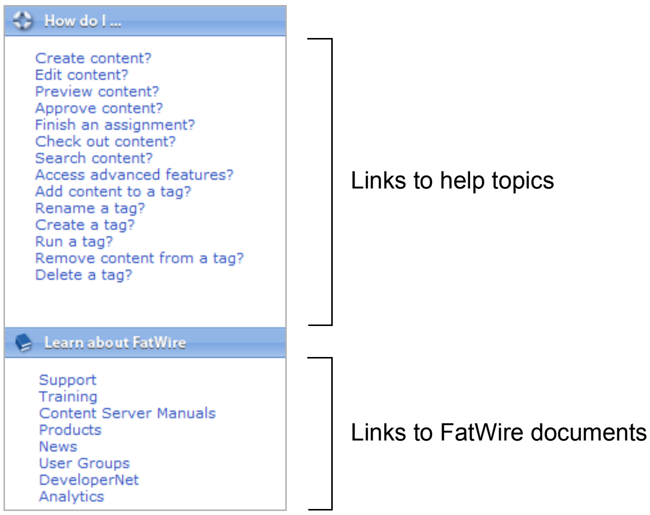
- **My Roles** – hold your cursor over the **View** link to see the roles associated with your user name (and therefore the permissions granted to you) in the current site.
- A snapshot summary of your present workload in the current site. The items displayed in the pane are explained in the following table:

Table 2: Quick info pane items

Field	Explanation
Assignments	The number of workflow assignments you have pending. Click the link to see a list of assets currently assigned to you to work on.
Checkouts	The number of assets currently checked out to you. Click the link to see a list of assets checked out to you.
Last Item Edited	The last asset you edited, and the date and time of the edit. Click the link to open the asset in the “Inspect” form. Hover your mouse over the date to view it in long date format.
Tasks I Have Assigned	The number of workflow assignments you have given to other users. This becomes a link when you have assigned out tasks. Click the link to see a list of assets you have assigned to others.
Last Time Logged In	The date and time you last logged in. Hover your mouse over the date to view it in long date format.

Help and Support Pane

The “Help and Support” pane provides one-click access to resources meant to aid you during your work with Content Server.



Note

Your CS administrator has the ability to customize the contents of the “Help and Support” pane to include content specific to your organization. If the pane has been customized on your CS system, consult your CS administrator for information on the contents of this pane.

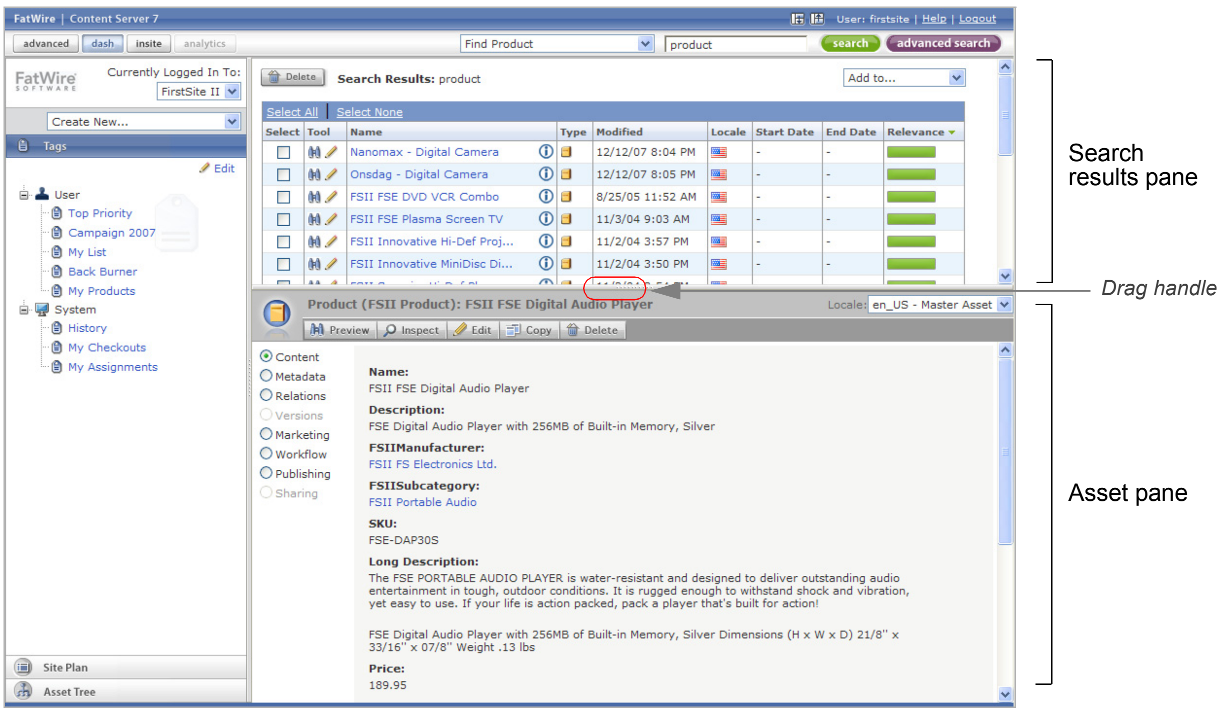
In the default Content Server implementation, the pane contains the following sections:

- **How Do I...** —provides links to instructions for the most commonly performed content management tasks.
- **Learn about FatWire**—provides links to useful online resources, including the FatWire Support site (which displays links to e-docs), and the FatWire DeveloperNet site.

Workspace: Asset Management View

When you log in and access an asset (by running a tag, performing a search, and so on), the workspace switches to the **asset management view**. In this view, the workspace displays the search results pane, the asset pane, or both panes simultaneously.

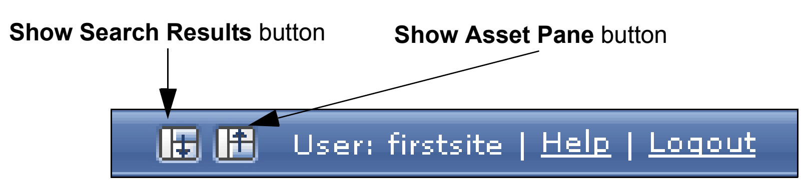
The first time you search for an asset after logging in, the list of returned assets fills the workspace. When you click an asset in the list, the asset pane fills the workspace and displays the asset you selected. If you then try to access another asset, the list of assets returned by the function you used (such as tags, site plan, or asset tree) is displayed above the currently open asset. This is called **split** mode. Here is an example view of the workspace in split mode:



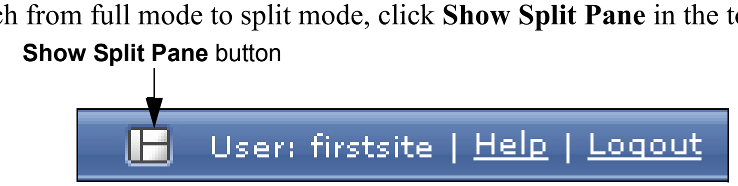
Tip: Drag the pane divider to adjust the size of the panes.

To switch from split mode to full mode, do one of the following:

- If you want to see only the search results, click **Show Search Results** in the top bar.
- If you want to see only the asset pane, click **Show Asset Pane** in the top bar.



- To switch from full mode to split mode, click **Show Split Pane** in the top bar:

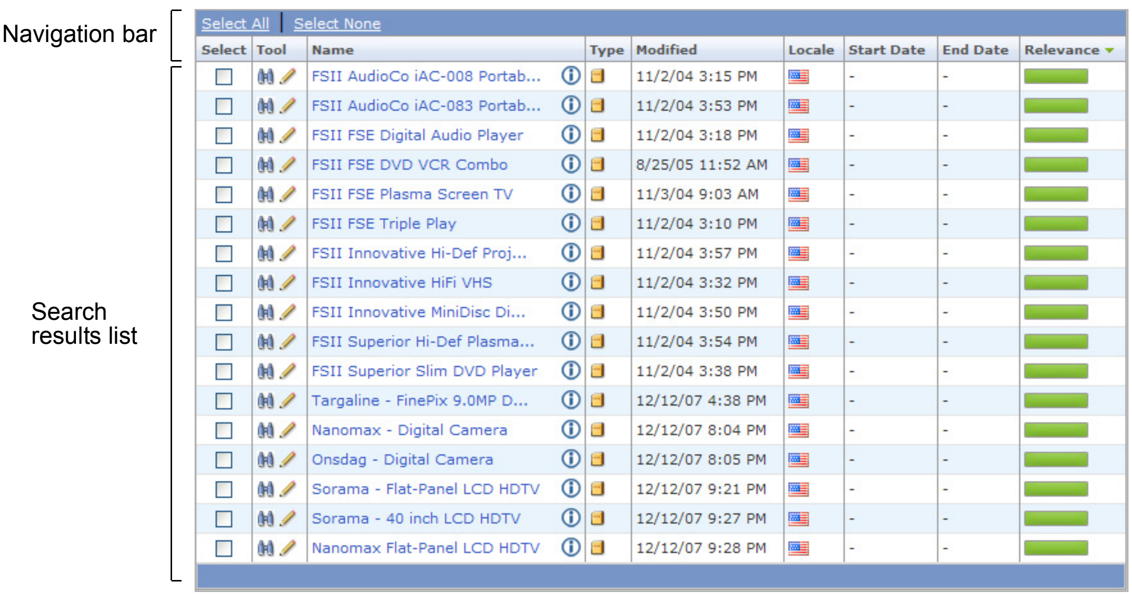


Search Results Pane

The search results pane displays lists of assets returned by the content management functions you request in the interface. To display the search results pane, do one of the following:

- Perform a search—Content Server displays a list of assets matching your search criteria. For more information, see “Finding and Organizing Assets,” on page 101.
- Run a tag—Content Server displays a list of assets returned by the tag. For more information, see “Running a Tag,” on page 109.
- Click a node in the **Site Plan** tree—Content Server displays a list of assets associated with the node you selected. See “Accessing Assets Using the Site Plan Tree,” on page 58.
- Click a node in the **Asset Tree**—Content Server displays a list of children belonging to the node you selected. See “Accessing Assets Using the Asset Tree,” on page 59.

The search results pane consists of the following components:



Select	Tool	Name	Type	Modified	Locale	Start Date	End Date	Relevance
		FSII AudioCo iAC-008 Portab...		11/2/04 3:15 PM		-	-	
		FSII AudioCo iAC-083 Portab...		11/2/04 3:53 PM		-	-	
		FSII FSE Digital Audio Player		11/2/04 3:18 PM		-	-	
		FSII FSE DVD VCR Combo		8/25/05 11:52 AM		-	-	
		FSII FSE Plasma Screen TV		11/3/04 9:03 AM		-	-	
		FSII FSE Triple Play		11/2/04 3:10 PM		-	-	
		FSII Innovative Hi-Def Proj...		11/2/04 3:57 PM		-	-	
		FSII Innovative HiFi VHS		11/2/04 3:32 PM		-	-	
		FSII Innovative MiniDisc Di...		11/2/04 3:50 PM		-	-	
		FSII Superior Hi-Def Plasma...		11/2/04 3:54 PM		-	-	
		FSII Superior Slim DVD Player		11/2/04 3:38 PM		-	-	
		Targaline - FinePix 9.0MP D...		12/12/07 4:38 PM		-	-	
		Nanomax - Digital Camera		12/12/07 8:04 PM		-	-	
		Onsdag - Digital Camera		12/12/07 8:05 PM		-	-	
		Sorama - Flat-Panel LCD HDTV		12/12/07 9:21 PM		-	-	
		Sorama - 40 inch LCD HDTV		12/12/07 9:27 PM		-	-	
		Nanomax Flat-Panel LCD HDTV		12/12/07 9:28 PM		-	-	

- **Navigation bar**—provide the means to navigate through your search results
- **Search results list**—displays a list of assets matching your search criteria

Note

In the list of assets, the asset type and locale are represented by icons. Hold your cursor over the icon to see the name of the asset type or locale.

For more information, see Chapter 4, “Finding and Organizing Assets.”

Icons

The tables below shows icons you may see next to lists of assets, such as search results lists, assignments lists, and groups of assets in the asset tree.

Table 3: Icons

Icon	Description
	**Preview**. Click to open the asset in the preview window of the InSite interface. This icon is disabled (grayed out) if you do not have permission to preview an asset.
	**Edit**. Click to open the asset in the "Edit" pane, where you can modify the asset. This icon is disabled (grayed out) if you do not have permission to edit an asset.

Tooltips

The table below shows tooltips you can access in lists of assets, such as search results lists, assignments lists, and groups of assets in the asset tree.

Table 4: Tooltips

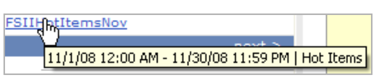
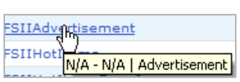
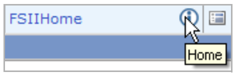
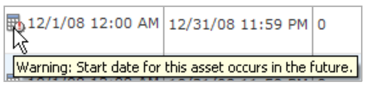
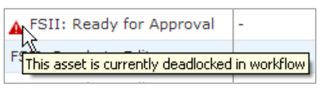
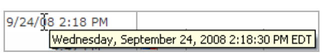
Tooltip	Description
Site Preview Date Range: example 1  example 2 	**Site Preview Date Range|*AssetName*** or **Site Preview Date Range|Description** This tooltip appears when you hover over an asset's name: • The tooltip shows the asset's start-end dates, if they are assigned, or "N/A" if they are not assigned. • Following the date range is either the asset's name or description. (The asset's name might be truncated, depending on the column width.) In example 1, both the start and end dates were assigned to the asset. The asset's description follows the dates. In example 2, neither a start date nor an end date was assigned to the asset, so "N/A" is displayed for both dates. Following "N/A" is the asset's full name.For information about the Site Preview feature, see Chapter 8, "Previewing Future Sites."

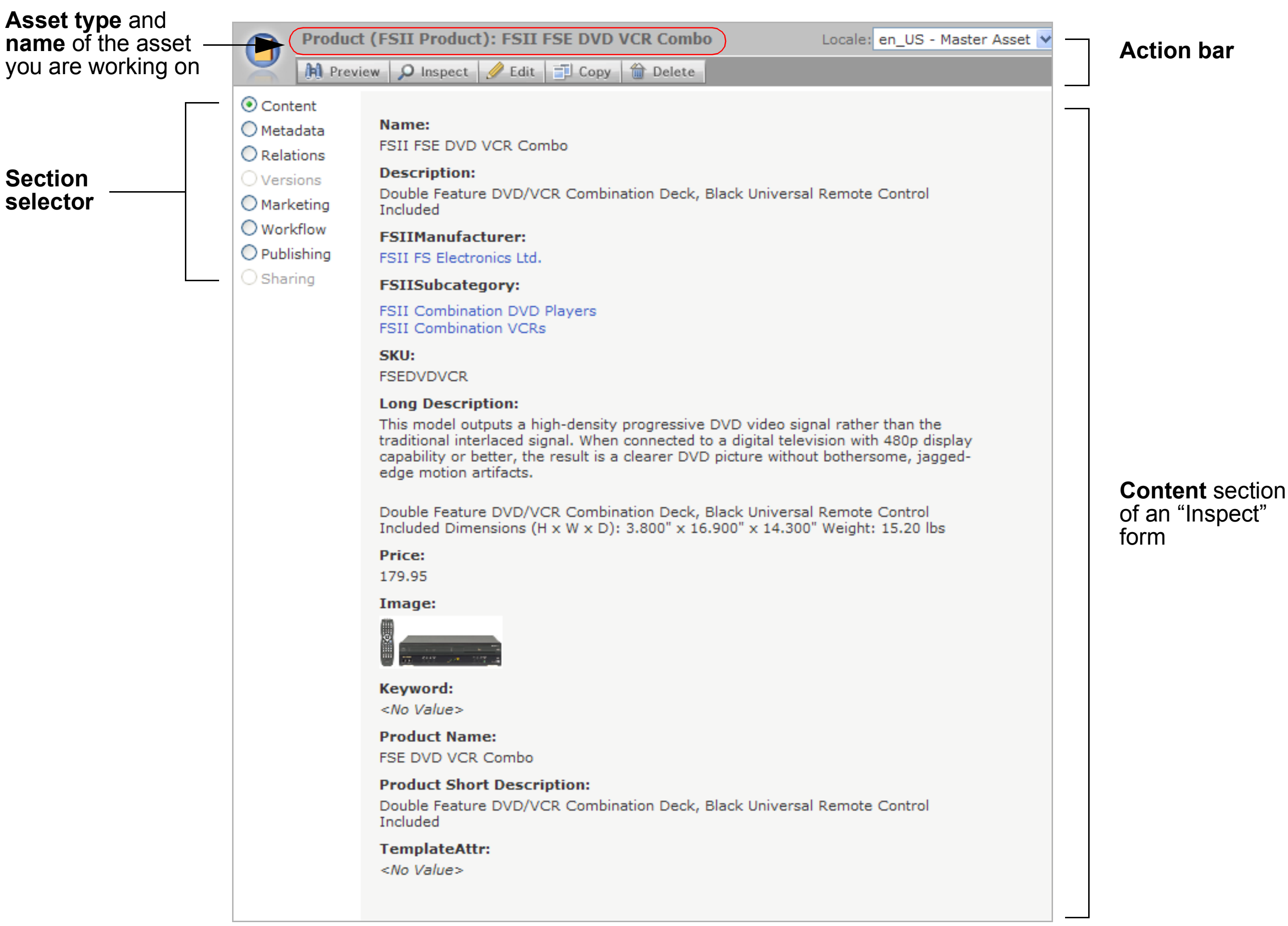
Table 4: Tooltips

Tooltip	Description
Information: 	This tooltip appears in the right margin of the "Name" column in search results lists and displays the asset's description in a tooltip.
Warnings: 	**Out of Date Warning** Hold your cursor over an out-of-date warning icon to display a tooltip with more details about the start/end date settings triggering the icon to appear. More information on the conditions that trigger this error message can be found in "Using Start and End Dates," on page 145 and "Approving an Asset for Publishing," on page 209.
	**Deadlock Warning** Hold your cursor over a deadlock warning icon to display a tooltip with more details about the workflow settings triggering the icon to appear. For more information on the conditions that trigger this error message, see "Deadlocks," on page 221.
	**Date and Time** Hold your cursor over any date to view the date and time in long format.

Asset Pane

When you create, inspect, or edit an asset, the asset pane displays the appropriate asset form. In each asset form, you interact with the following:

- Action Bar
- Form Sections



Note

- Depending on your role(s) in the site, the way your developers configured the asset types available to you, and the task you want to accomplish, some of the interface elements and form sections described in this section may not appear or be accessible to you.
- Your CS administrator may have customized the asset form sections available to you. In such case, the descriptions in this guide might not match the form sections you see in your interface. You may also see custom sections that are not part of Content Server's default implementation.

Action Bar

The action bar at the top of each asset form allows you to initiate many asset management functions, such as editing, saving, or previewing an asset.

The action bar is dynamic; that is, it displays different functions based on the following:

- The content management task you are performing
- Whether you have the permissions necessary to perform the selected task
- Whether your site is set up for multilingual support
- Whether the asset you are working with has been translated into other languages

The action bar also displays the name and asset type of the asset you are working on.

Form Sections

Asset forms are divided into sections, accessible via the form section selector. Your administrator has the ability to customize the asset forms (and their individual sections) on your site, as well as grant or deny you permissions to access specific form sections.

The default Content Server implementation contains the following form sections:

Table 5: Asset form sections

This section	Allows you to...
Content	View and edit the content stored in the asset. For more information, see Chapter 3, "Creating and Editing Assets." (Your administrator can customize this section.)
Metadata	View the asset's metadata, such as creation date, asset ID, and any asset type-specific attributes. Assign a start date and end date (for more information, see "Using Start and End Dates," on page 145.) Modify the asset's **Locale** setting (for more information, see "Setting or Changing an Asset's Locale Designation," on page 116). Select a template for the asset. Select a subtype or category for the asset. (Your administrator can customize this section.)
Relations	View the assets this asset is related to or associated with. Create and modify associations for the asset For more information, see "Working with Asset Associations," on page 156. (Your administrator can customize this section.)
Marketing	View and edit Engage (if installed) options for the asset. For more information, see "Rating Assets for Segments," on page 167. (Your administrator can customize this section.)

Table 5: Asset form sections *(continued)*

This section	Allows you to...
Workflow	View workflow-related information for the asset. Perform workflow actions, such as finishing your assignments. For more information, see Chapter 12, “Workflow.” If no workflow processes are enabled for the current site, this selection is unavailable (greyed-out).
Publishing	Approve the asset for publishing to one or more destinations. Approve dependent (blocking) assets, if asset has dependencies. Monitor the publishing status of the asset. For more information, see Chapter 11, “Approval for Publishing.” If no publishing destinations are enabled for the current site, this section is unavailable (greyed-out) in the section selector.
Sharing	Share the asset with other sites that you have permissions to work with. For more information, see “Sharing Assets with Other Sites,” on page 166. If the requirements for sharing the asset (outlined in “Sharing Assets with Other Sites,” on page 166) are not met, this section is unavailable (greyed-out) in the section selector.
Versions	View the asset’s revision history. Roll asset back to a previous version. For more information, see Chapter 13, “Revision Tracking.” If revision tracking is not enabled for the asset type, this selection is unavailable (greyed-out) in the section selector.

Chapter 3

Creating and Editing Assets

This chapter describes the basic procedures for creating, editing, and deleting assets, illustrated with examples from the FirstSite II sample site.

This chapter contains the following sections:

Creating Assets

The Dash interface is designed to be used by content providers, rather than developers. Therefore, certain assets (Article, Image, Dimension, DimensionSet, Template, Collection, Query, Link, LinkSet, and Page assets) are only supported in the Advanced interface, and are not supported in the Dash interface.

Creating assets is permission based as well. If you have the right permissions, you can create brand new assets "from scratch," using Content Server's Dash interface. If the new asset that you want to create is similar to an existing one, you can copy the existing asset and make changes to the copy, which saves you a few steps. Both methods are described later in this section.

You can also create new assets using the Advanced interface (described in the *Content Server Advanced Interface User's Guide*), or one of the Windows-based clients:

- **Content Server Desktop**, which enables you to create assets from within Microsoft Word.
- **Content Server DocLink**, which (in the form of a Windows Explorer extension) enables you to create document assets out of a variety of popular file formats, such as Microsoft Word or PDF documents.

The difference between the two Windows clients is in how the assets they create are stored in the CS database: the assets you create with CS-Desktop are converted to the fields that you see in the asset forms in Content Server's interface; the assets you create with CS-DocLink are stored in their native format as single objects called **blobs**, or **b**inary **l**arge **ob**jects.

Which Assets Can You Create?

The assets you can create (and copy) are determined by how the administrator has personalized the "Create New..." drop-down list for your role. The purpose of personalizing the contents of the "Create New..." drop-down list is to make your job easier.

- You should not have to see assets you are not interested in.
- You should not have to provide information that is already known, or that you have no way of knowing without researching.
- If set values are required, you should not be able to alter these values.
- Reasonable defaults should be preselected for you.
- A flex asset that is based on an asset definition should have that definition preselected.
- An asset that must enter a workflow upon creation should be preassigned to the appropriate workflow process.

By personalizing the contents of the "Create New..." drop-down list, the administrator makes sure that you can focus on the quality of the content you create, and not on the technical aspects of entering and storing it in the Content Server system.

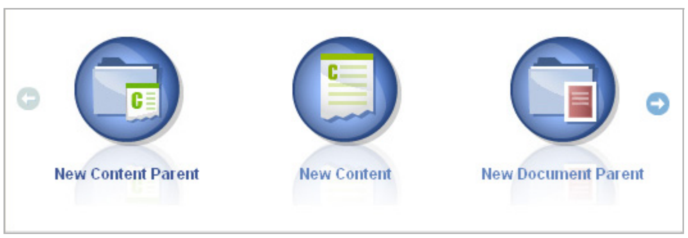
Creating a New Asset

Note

Which assets you can create is determined by: the assets that are supported in the Dash interface, and the asset types made available to you by your CS administrator.

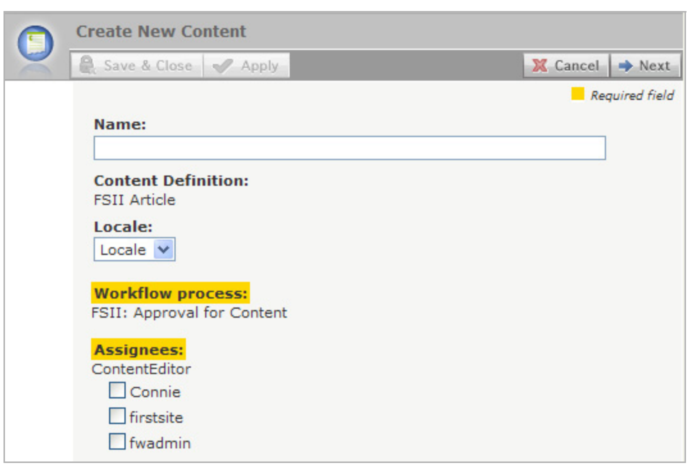
To create a new asset

1. Log in to the site you want to work with.
2. Select the type of asset you want to create. Do one of the following:
   - In the "Create New..." drop-down list at the top of the navigation pane, select the type of the asset you want to create.
   - (Optional) If the "Quick Access" pane is displayed, do the following:
     1) Use the left and right arrows located at the edges of the pane to scroll through the asset types available to you.



     2) Click the icon representing the desired asset type.

        Content Server displays the "Create New *Asset*" form:



3. In the "Create New *Asset*" form, do the following:
   a. Enter a name for the asset. Note the following conventions when naming the asset:
      - The name must be between 1 and 64 alphanumeric characters.

- The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), question mark (?), percent sign (%), less-than sign (<), and greater-than sign (>).
- The name can contain spaces (except for names of flex attributes), but cannot start with a space.

b. If you plan to create translations of the asset, or if you are required to specify the language of the content you create, select the asset's target language in the "Locale" drop-down list. For more information, see Chapter 5, "Working with Multilingual Assets."

c. If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, you will see the following fields:

- The **Workflow Process** field, showing the pre-assigned workflow process
- The **Assignees** field, listing possible assignees for each role required by the process

Select at least one assignee for each role to proceed with the creation of the asset. Any of these users can complete the next step in the workflow process.

For more information, see Chapter 12, "Workflow."

d. Click **Next**.

Content Server displays an empty "Edit" form. The name you entered in step a is pre-filled in the **Name** field.

4. Fill in the "Create" form as follows:

- **Save your work as you go.** Click **Save** to save your progress as you work on the asset. When you click **Save**, Content Server commits the changes to the database and keeps the asset open in the "Edit" form so that you can keep working.
- If any of the fields or form sections are unfamiliar to you, consult your developers or CS administrator.

a. When populating the form, take note of the following:

- **Required fields.** You must fill in all required (highlighted) fields before you are permitted to save the asset. Fill in all other fields as necessary.
- **WYSIWYG text fields.** You may see one or more text fields that are WYSIWYG-enabled via a WYSIWYG editor, such as FCKEditor. These text fields allow you to enter and format your content using controls similar to those of Microsoft Word. For more information, see "Working with the FCKEditor," on page 86.
- **Date fields.** You may see a **Date Picker** (calendar) icon next to a date field. Clicking the icon invokes the Date Picker attribute editor; see "Working with the Date Picker," on page 97 for more information.
- **Image Picker fields.** You may see one or more fields that prompt you to select an image asset (to be associated with the asset you are creating) through the Image Picker attribute editor. In such cases, you will see a **Browse** button next to the field. Clicking the button displays a pop-up window showing thumbnails of the image assets you can select. For more information on Image Picker, see "Working with the Image Picker," on page 88.

- **Clarkii Online Image Editor fields.** You may see a field (or fields) that allows you to edit images directly in the asset form, using Clarkii OIE. For detailed instructions, see "Working with the Clarkii Online Image Editor," on page 91.
- **Flash content fields.** You may see a section in the asset form that prompts you to compose Flash content from Flash templates, images and text of your choice. For detailed instructions, see "Working with Flash Content," on page 95.
- **Fields that prompt you to create or select assets.** You may see fields that prompt you to create or select a parent or a template, or associate an asset with the asset you are creating.

  Do one of the following:

  • If the field displays an **Add New** button, follow the steps below:

    1) Click **Add New** to create a new linked asset.

    2) Fill in all the required attributes for the new linked asset.

    3) Click **Save and Close** to return to editing the original asset. See

    The new linked asset is added to the original asset's definition. You may have the option of creating more than one new linked asset for the same field in this manner.

  • If the field displays a drop-down list, select the desired asset from the list.

  • If the field displays a **Link Asset** (or **Link Parent**) and a **Show Assets** button, follow the steps below:

    1) Click **Show Assets**.

       Content Server displays a list of assets eligible as values for the field.

    2) Navigate to the desired asset(s). Select the asset(s), using the associated radio button or check box(es).

    3) Click **Link Asset** (or **Link Parent**).

    Content Server links your selected asset(s) to the new asset. The name of the linked asset is displayed in the field. More information on linking assets and parents can be found in "Working with Asset Associations," on page 156.

b. Select the next section in the form section selector and populate the section as outlined in step a on page 78. Continue until you have populated all required sections (marked with an asterisk). Populate other sections as necessary.

5. Save the asset by clicking **Save & Close**.

When you save the asset, Content Server displays the asset in the "Inspect" form, unless:

- You have left out one or more required fields in one or more sections
- An entry or selection you have made in is not permitted

If either of the above is true, Content Server displays an error message indicating the offending fields. Correct the errors, then click **Save & Close**.

6. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section "Assigning an Asset to a Workflow," on page 226.
7. (Optional) If you want to see how the asset would look if it were published, you can preview it. To do so, click **Preview** in the action bar at the top of the asset's "Inspect" form. A new window opens and displays the asset in its rendered form.

Note

If the asset is time-sensitive (specifies start and/or end dates), you must specify the preview date in the preview window. (Start/end dates are set in the asset's **Metadata** tab. For more information, see Chapter 8, "Previewing Future Sites.")

Creating a New Asset by Copying an Existing Asset

You can create a new asset by copying an existing asset. You can then work on the copy, reusing the information already present and making changes where necessary. You can copy an asset even if it is checked out by another user.

> **Note**
>
> Which assets you can copy is determined by the asset types made available to you by your CS administrator.

To create a new asset by copying an existing asset

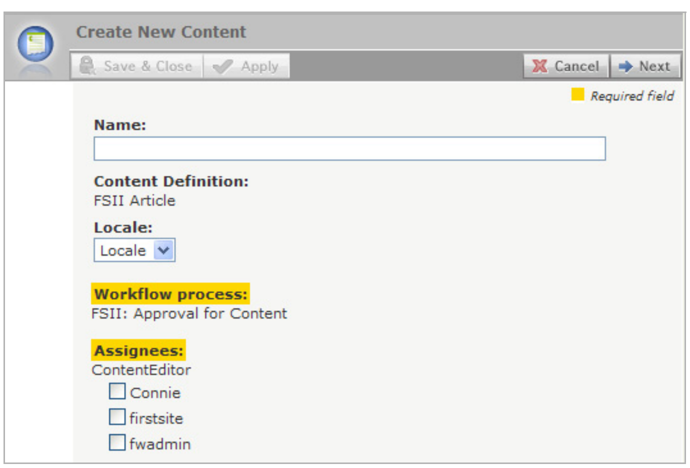
1. Log in to the site you want to work with.
2. Find and select the asset.
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding and Organizing Assets," on page 101.
   b. In the list of results, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. In the action bar, click **Copy**.

> **Note**
>
> If the **Copy** button or menu item is not displayed, stop here. You do not have the permissions to copy the asset. If you have questions about your permissions, contact your CS administrator.

Content Server displays the "Create New *Asset*" form:



4. In the “Create New *Asset*” form, do the following:
   a. In the **Name** field, enter a name that uniquely identifies the new asset.

      Note the following conventions when naming the asset:
      - The name must be between 1 and 64 alphanumeric characters.
      - The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), question mark (?), percent sign (%), less-than sign (<), and greater-than sign (>).
      - The name can contain spaces (except for names of flex attributes), but cannot start with a space.
   b. (Optional) Set or change the new asset’s locale designation in the “Locale” drop-down list.

      If you do not make a selection, one of the following happens:
      - If the source asset has a locale designation, the new asset will retain the locale designation of the source asset.
      - If the source asset has no locale designation, the new asset will not have a locale designation until you manually assign one.

      For more information, see Chapter 5, “Working with Multilingual Assets.”
   c. (Optional) If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, you will see the following fields:
      - The **Workflow Process** field, showing the pre-assigned workflow process
      - The **Assignees** field, listing possible assignees for each role required by the process

      You must select at least one assignee for each role to proceed with the creation of the asset. Any of these users can complete the next step in the workflow process.

      For more information, see Chapter 12, “Workflow.”
   d. Click **Next**.

      An “Edit” form containing the fields and values of the asset you copied appears.
5. Make your changes in the “Edit” form.

   See step 4 on page 78 for details on filling in the fields on this form.
6. Save the asset by clicking **Save & Close**.

   When you save the asset, Content Server displays the asset in the “Inspect” form, unless:
   - You have left out one or more required fields in one or more sections
   - An entry or selection you have made in is not permitted

   If either of the above is true, Content Server displays an error message indicating the offending fields. Correct the errors, then click **Save & Close**.
7. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section “Assigning an Asset to a Workflow,” on page 226.

8. (Optional) If you want to see how the asset would look if it were published, you can preview it. To do so, click **Preview** in the action bar at the top of the asset's "Inspect" form. A new window opens and displays the asset in its rendered form.

Creating a New Asset in CS-Desktop

You can create new assets using the CS-Desktop client, provided your system is set up to support it. When using CS-Desktop, the assets you create originate as Word documents. The content from each document is entered into the Content Server database as an asset by mapping document contents to asset fields directly from within Microsoft Word. To do this mapping, you must have the CS-Desktop client installed on your local machine.

When you install the client, you also install an online Help file that describes how to use CS-Desktop. After the client is installed, the Help file is accessible from within Word. To install the client (and the Help file), extract the provided archive (`csdesktop.zip`) and launch the `setup.exe` file.

Creating a New Asset in CS-DocLink

You can create new assets from common binary file types such as text files, spreadsheets, and images using CS-DocLink, provided your system is set up to use it and you have the client software installed on your machine. You create new assets by dragging and dropping files into a folder-like hierarchical view of the Content Server database in Windows Explorer.

When you install the client, you also install an online Help file that describes how to use CS-DocLink. After the client is installed, the Help file is accessible from within Windows Explorer. To install the client (and the Help file), extract the provided archive (`CSDoclink.zip`) and launch the `setup.exe` file.

Editing Assets

Assets can be edited in a variety of ways, depending on the asset type and your system configuration. You can edit an asset by using any of the following interfaces:

- Content Server's Dash interface
- Content Server's Advanced interface (described in the *Content Server Advanced Interface User's Guide*)
- CS-Desktop
- CS-DocLink
- In your Internet browser, using the InSite interface (for instructions, see Chapter 6, "Working with the InSite Interface")

Note

- You must have the right permissions to edit assets.
- To use the CS-Desktop and CS-DocLink clients, or the InSite interface, your site must be specifically set up to enable such functionality.

Editing Assets in the Dash Interface

To edit an asset in the Dash interface

1. Log in to the site you want to work with.
2. Find and edit the asset.
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

   For more information on finding assets, see "Finding and Organizing Assets," on page 101.

   b. In the list of results, navigate to the desired asset and click the **Edit** (pencil) icon to the left of the asset's name.

      Content Server displays the asset in the "Edit" form.
3. Make your changes in the "Edit" form.

   See step 4 on page 78 for details on filling in the fields on this form.
4. Save the asset by clicking **Save & Close**.

   When you save the asset, Content Server displays the asset in the "Inspect" form, unless:

   - You have left out one or more required fields in one or more sections
   - An entry or selection you have made in is not permitted

If either of the above is true, Content Server displays an error message indicating the offending fields. Correct the errors, then click **Save & Close**.

5. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section "Assigning an Asset to a Workflow," on page 226.
6. (Optional) If you want to see how the asset would look if it were published, you can preview it. To do so, click **Preview** in the action bar at the top of the asset's "Inspect" form. A new window opens and displays the asset in its rendered form. (Note that for the preview function to work, the asset must have a template assigned to it.)

Editing Assets in CS-Desktop

To edit an asset that was created in Microsoft Word, you use the CS-Desktop toolbar, which is added to the Word interface when you install the CS-Desktop client on your local computer. For complete information about using CS-Desktop, consult the CS-Desktop Help file accessible from the CS-Desktop toolbar inside Microsoft Word.

Note

CS-Desktop assets cannot be edited in the Dash interface because saving a CS-Desktop asset in Dash would irreversibly sever the asset's link to CS-Desktop. The asset would no longer be accessible in CS-Desktop.

If you attempt to edit a CS-Desktop asset in the Dash interface, a warning will appear and you will be returned to the asset's "Inspect" screen.

Editing Assets in CS-DocLink

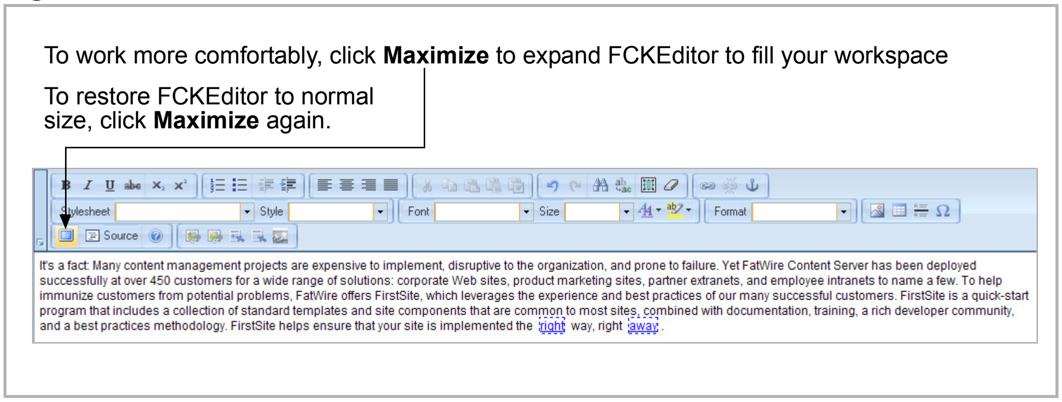
When you install the CS-DocLink client software, a "CS-DocLink" node is added to the tree in the left pane of the Windows Explorer window. To edit an asset that was created from a binary file, you navigate to the asset in the CS-DocLink hierarchy as if you were browsing your local file system, and drag the asset to your desktop. You then open the file in its native application and make the appropriate changes. To save the modified file to the Content Server database, you save it in its native application and then drag it from your desktop back to where you found it in the CS-DocLink hierarchy.

For complete information on how to use CS-DocLink, see the online Help that is installed with the client software.

Working with the FCKEditor

FCKEditor is a popular third-party WYSIWYG editor that ships bundled with Content Server as the default editor for WYSIWYG-enabled text fields. FCKEditor allows you to apply a wide range of MS Word-style formatting to your content.

Figure 5: FCKEditor

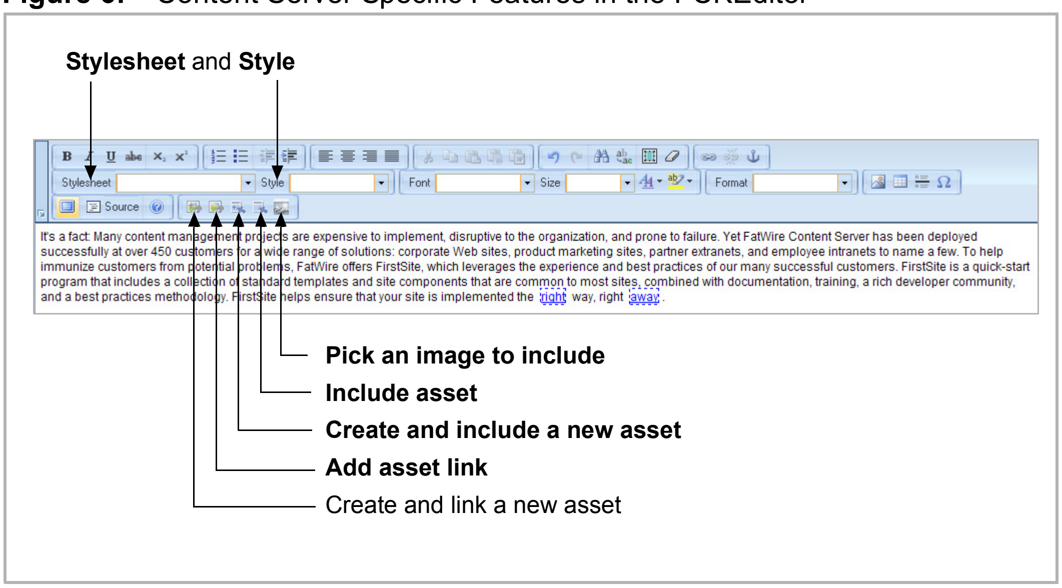


FCKEditor also provides advanced features, such as access to your content's underlying HTML code, and the ability to accept pre-formatted content from MS Word documents.

Most features made available to you in the toolbar are native to FCKEditor. To learn more about FCKEditor and its capabilities, consult the editor's documentation, available at `http://docs.fckeditor.net`.

Several features on the FCKEditor toolbar are specific to Content Server. The features are shown and explained below:

Figure 6: Content Server Specific Features in the FCKEditor



- **Stylesheet** – Lists XML files that specify how text can be formatted in the field you are working with.

Content Server ships with a default XML file template, and the developers for your system can create additional XML files. If your developers have not added any XML files, then only the default XML file will be available to you in the drop-down list.

Instructions on using the **Stylesheet** menu are available in "Linking Two Assets Directly" (see, in particular, step b on page 180).

- **Style –** Lists styles that are specified in the selected style sheet (in the **Stylesheet** menu).
- **Add asset link** – Enables you to create a hypertext link from one asset to another asset. For more information, see "Linking Two Assets Directly," on page 175.
- **Include asset** – Enables you to render an asset's previewable content in another asset. For more information, see "To Link Two Assets by Inclusion," on page 181.

Note

If the included asset is an image, then you can link the image to another asset. For more information, see "Linking Two Assets via an Image Asset," on page 184.

- **Pick an image to include** – Enables you to include an image from the "Image Picker," into the referring asset's FCKEditor enabled field(s).

  Once the image is included in the field, you have the option to link the image to another asset. For more information, see "Linking via an Image from the Image Picker," on page 191
- **Create and link a new asset** – Enables you to create a target asset directly from the referring asset's FCKEditor enabled field(s), and to insert a hypertext link to that target asset. For more information, see "Insert a Hyperlink to the New Target Asset," on page 196.
- **Create and include a new asset** – Enables you to create a target asset directly from the referring asset's FCKEditor enabled field(s), and to include the previewable content of that target asset. For more information, see "Include the Target Asset's Previewable Content," on page 199

Loading an FCKEditor

When many FCKEditors are configured for a given asset (for example, an FCKEditor for each of five fields), the process of loading the asset's "New" or "Edit" form can take a long time. To minimize the time it takes to load an asset form, your Content Server developers have the option to implement a feature called "lazyload." When the `lazyload` parameter is set to `true`, FCKEditors in the asset will not automatically load with the asset form. Because less elements are loaded at the same time as the asset form, the loading process is faster.

To work in an FCKEditor-enabled field when lazyload is implemented, you must initiate FCKEditor for that field by clicking in the field. When you click in the field, the FCKEditor toolbar opens.

Working with the Image Picker

When working with assets whose forms allow you to associate them with one or more image assets, you may have the option to visually choose an image asset to associate with the asset you are creating or editing. This method of selection is made possible through the Image Picker attribute editor.

> **Note**
>
> When configuring the asset type of the parent asset, your developers decide the following:
>
> - The fields for which Image Picker is enabled
> - The asset type of the image assets displayed by Image Picker

Perform the following steps to associate an image asset with the parent asset:

To associate an image asset with a parent asset using the Image Picker

1. In the asset's "Edit" form, scroll to the desired field and click **Browse Images**.

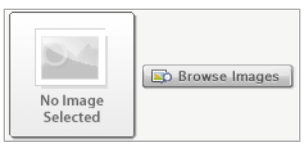
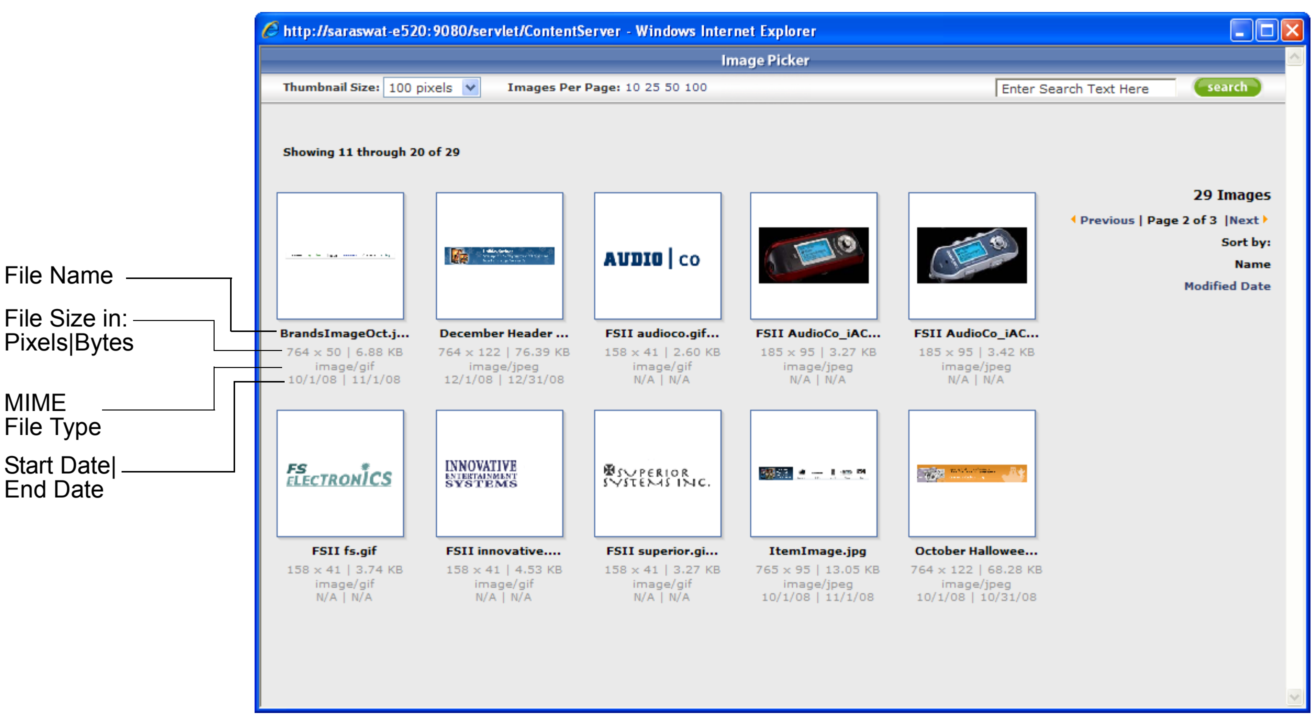


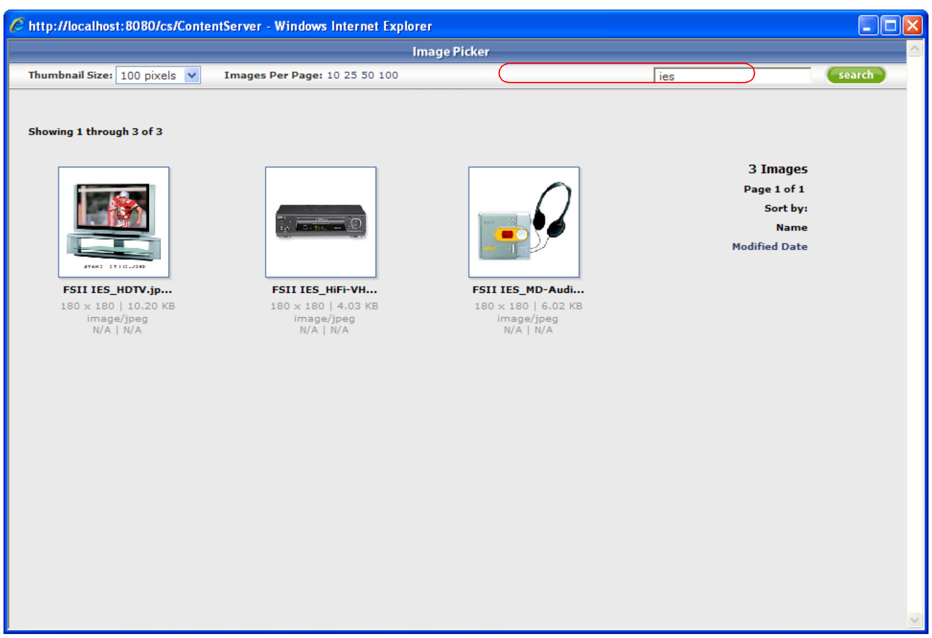
Image Picker opens in a pop-up window.



For each displayed image asset, Image Picker shows a thumbnail of the image, as well as its properties, such as file name, dimensions (in pixels), file size, MIME type, and the start and end date (if no start or end date is specified, "N/A" appears instead of a date). Pause the cursor over any image to view it full size. If the image name was elided in the thumbnail view, you can see the full image name in the mouseover window.

2. (Optional) If the pool of available images is large, you can narrow the selections by searching for a specific image asset. Enter one or more keywords describing the asset into the **Search** field at the top of the Image Picker window and click **Search**.

   Image Picker displays the images matching your search criteria.



3. (Optional) Adjust the size of the displayed thumbnails by selecting a pixel width from the "Size" drop-down list. Available sizes range from 100 to 200 pixels in 25-pixel increments.
4. Navigate to the desired image.

- Use the **Next** and **Previous** links to page through the image thumbnails.
- Use the **Sort By** links to sort the images by Name or Modified Date.

5. Click on the image you wish to associate with the asset.

   The Image Picker window closes and the image asset you selected is associated with the parent asset. If the field was already populated with an image asset, the newly selected asset replaces the previous one. A thumbnail of the corresponding image appears in the field you edited.

6. Click **Save & Close** to save your changes to the parent asset.

Working with the Clarkii Online Image Editor

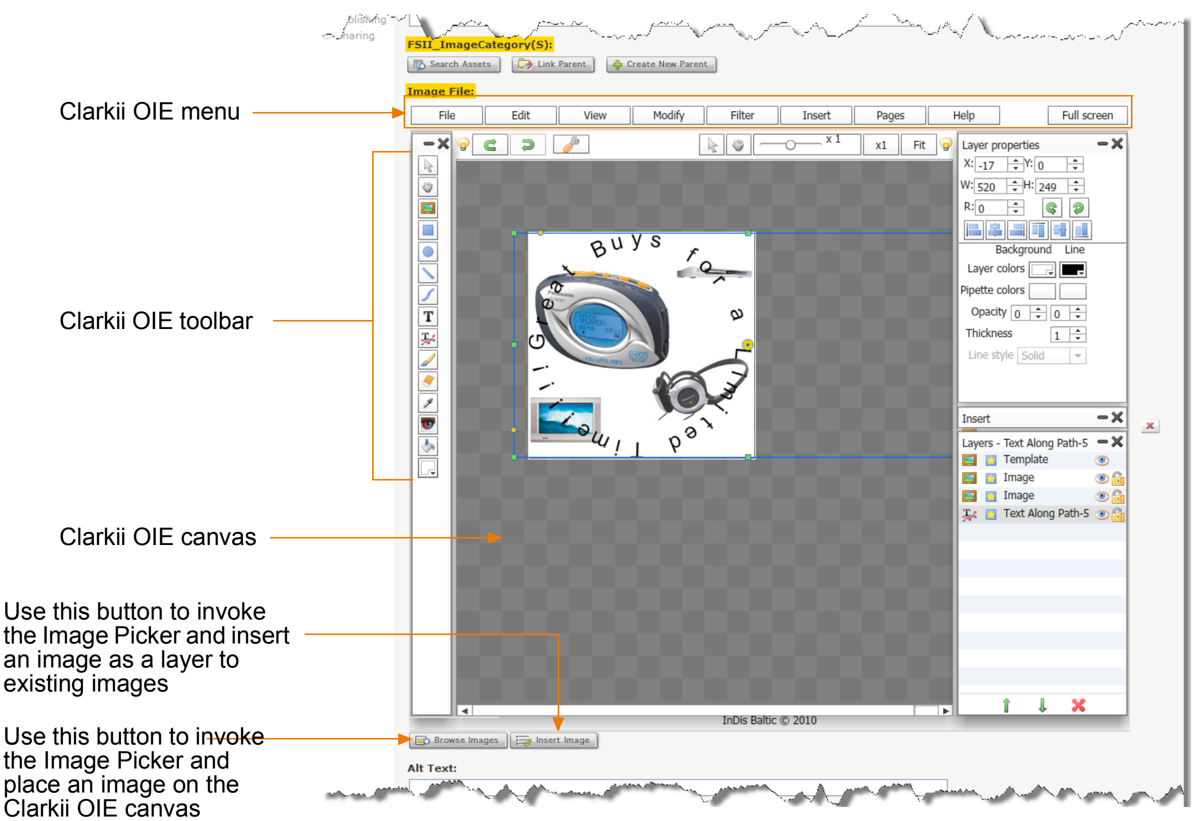
The Clarkii Online Image Editor (Clarkii OIE) allows you to edit an image directly in an asset's "New" or "Edit" form. For example, you can use Clarkii OIE to enhance an image by adding graphics and/or text to it.

Note

Clarkii OIE is supported on all browsers on which Content Server is supported, including Safari. Your site developers enable Clarkii OIE on a per-field basis when configuring asset types. For more information, see the *Content Server Developer's Guide*.

Figure 7 shows an example of an image that was edited in an asset field using Clarkii OIE.

Figure 7: Clarkii Online Image Editor rendered in a field of an asset's "New" form



Clarkii OIE requires you to have Flash installed. If you do not have Flash installed, then instead of Clarkii OIE you will see a link to download Flash. Click the link to download Flash. Once Flash is installed, Clarkii OIE loads in the appropriate field (as shown in the figure above).

When you work with an asset field using Clarkii OIE, you can do some or all of the following depending on how your developers configured Clarkii OIE:

- Select an image to place on the Clarkii OIE canvas, or select an image that will replace the images currently on the canvas. Your developers determine which images will be available to you.
- Add an image as a layer to existing images on the Clarkii OIE canvas. Your developers determine which images will be available to you.
- Use the toolbar and menu options available in the Clarkii OIE window to make other edits to the image(s) on the canvas as necessary.

  Your developers have the ability to customize the functions available to you in the Clarkii OIE toolbar and menu. These functions are strictly Clarkii OIE related and as such are not documented in this guide. For instructions about using the toolbar and menu options provided by Clarkii OIE, visit the following URL:

  `http://www.online-image-editor-clarkii.com/`

To edit images with the Clarkii Online Image Editor

Note

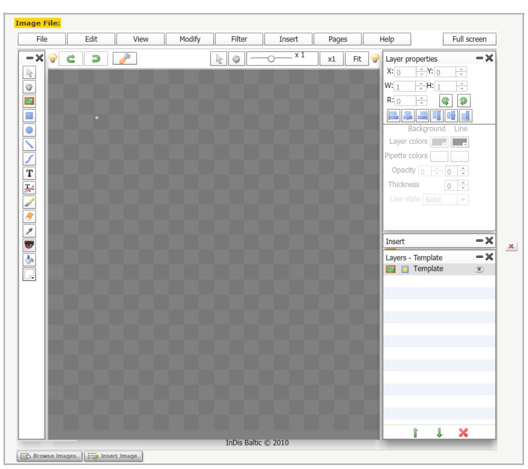
- Before using this feature, make sure that you know which asset forms contain an attribute field associated with Clarkii OIE.
- The instructions in step 2 are guidelines that provide you with examples of what you can do when using Clarkii OIE. The functions you can perform in this step are determined by how your developers configured the Clarkii OIE properties.

If you have any questions, contact your developers.

1. Access Clarkii OIE in the desired asset's "New" or "Edit" form. Depending on which interface you are working with, do one of the following:

   - If you are working in the Dash interface, navigate to the field associated with Clarkii OIE in the asset's "New" or "Edit" form and click the **Image Editor** (pencil) icon.

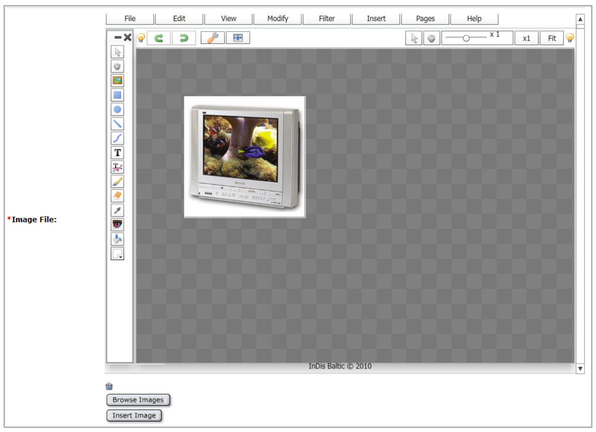
     Clarkii OIE is rendered in the field and looks similar to the following:

- If you are working in the InSite interface:
  1) In the InSite pane, click the **Editing** option.

     The asset is displayed in the "Editing" mode.
  2) Click **Edit Asset** next to the image you wish to modify.

     An Advanced "Edit" form for the selected asset is rendered in a pop-up window. The Clarkii OIE window is displayed in its associated field and looks similar to the following:



Note

Your site developers enable the button that invokes the asset's "Edit" form in the pop-up window. If you do not see an option to edit the asset in the InSite interface, contact your administrators or developers.

2. (Optional) The following instructions are some of the more commonly used steps for working with the Clarkii OIE feature. For example, inserting images and making other modifications (such as adding text) as necessary.

Note

- If you are working in the Dash interface, you can clear the canvas at any time by clicking the  icon, located to the right of the Clarkii OIE area.
- If you are working in the InSite interface, you can clear the canvas at any time by clicking the trash can icon above the **Browse Images** button.

- If you wish to insert an image on the Clarkii OIE canvas, replacing any images currently existing on the canvas, do the following:
  a) Under the Clarkii OIE area, click **Browse Images** to select from a pool of images made available to you by your developers.

     The Image Picker opens in a pop-up window.

b) In the Image Picker window, find and select the desired image. For instructions, see "Working with the Image Picker," on page 88.

   Selecting an image closes the Image Picker window. The image is placed on the Clarkii OIE canvas, and replaces any images that are currently existing on the canvas.

c) (Optional) If you wish to replace the image you chose with another one, select the desired image by repeating steps a and b.

- If you wish to add an image as a layer on top of existing images on the Clarkii OIE canvas, do the following:

  a) Under the Clarkii OIE area, click **Insert Image** to select from a pool of images made available to you by your developers.

     The Image Picker opens in a pop-up window.

  b) In the Image Picker window, find and select the desired image you wish to add as a layer on the Clarkii OIE canvas. For instructions, see "Working with the Image Picker," on page 88.

     Selecting an image closes the Image Picker window. The image is placed on the Clarkii OIE canvas as a layer on top of the other images currently existing on the canvas.

  c) (Optional) If you wish to insert an additional image as a layer on top of the images currently on the canvas, repeat steps a and b.

- Depending on how your developers have configured the Clarkii OIE toolbar and menu options, you can add text and make other edits as necessary (such as repositioning images on the canvas).

  For example, using the Clarkii OIE menu you can insert an image from your local computer onto the Clarkii OIE canvas:

  a) In the Clarkii OIE menu, select **File** > **Open**.

     The "Select file to open" dialog box opens.

  b) Select the image file you wish to insert on the Clarkii OIE canvas and click **Open**.

     The image is placed on the canvas, and replaces any images that are currently existing on the canvas.

  c) (Optional) If you wish to replace the image you chose with another one, select the desired image by repeating steps a and b.

  For instructions on using specific functions, visit the following URL:

  `http://www.online-image-editor-clarkii.com/`

3. Save the asset. Do one of the following:

   - If you are working in the Dash interface, fill in the required fields of the asset form, then click **Save & Close** to save the asset.

   - If you are working in the InSite interface, make any other changes to the asset's "Edit" form and then click **Save Changes**. To close the pop-up window, click **Close this window**.

   Once saved, the layered image becomes a flat image. This means that any images and/or text you added to the Clarkii OIE canvas are merged into one image.

Working with Flash Content

Content Server allows you to compose Flash content from Flash templates, images, and text, directly in an asset's "Edit" form. You compose Flash Content through the following steps:

1. Select a Flash template. Your site designers create Flash templates that accept the foreground image and text you will be adding.
2. Add an image. The images and Flash templates, made available to you by your developers, have been designed to form complete pieces of content when combined.
3. Add supporting text.
4. Preview the resulting Flash content and make further changes if necessary.
5. Save and close the asset. When the Flash content is rendered on the online site, the image and text you have added will be embedded automatically.
6. (Optional) Preview the asset and make further changes if necessary.

If you have any questions about this process, consult your site developers.

To compose Flash content

Note

This procedure is an example, based on the FirstSite II sample site, meant to illustrate the steps necessary to compose Flash content. The asset forms on your site may be set up differently from our example.

Before using this feature, make sure that:

- Your developers have coded the asset type and associated templates to support the image editing functionality
- Your site designers have created the appropriate Flash templates and images

If you have any questions, contact your site designers or developers.

1. Log in to the site you want to work with.
2. Create a new Flash asset or find and open an existing asset that you want to modify.
3. In the asset form, navigate to the appropriate section and field. (In our example, the **Content** section contains a group of fields whose names begin with **Flash**. Consult your developers for information on the fields and sections available in the asset forms on your site.)
4. Select a Flash template:
    a. In the **FlashTemplate** field, click **Show Assets**.

       Content Server displays a list of assets eligible as values for the field.
    b. In the list of assets, navigate to the desired asset and select its check box.
    c. Click **Link Asset**.

       The name of the Flash template asset you selected is displayed in the field.
5. Add an image:
    a. In the **FlashImages** field, click **Browse**.

The Image Picker opens in a pop-up window.

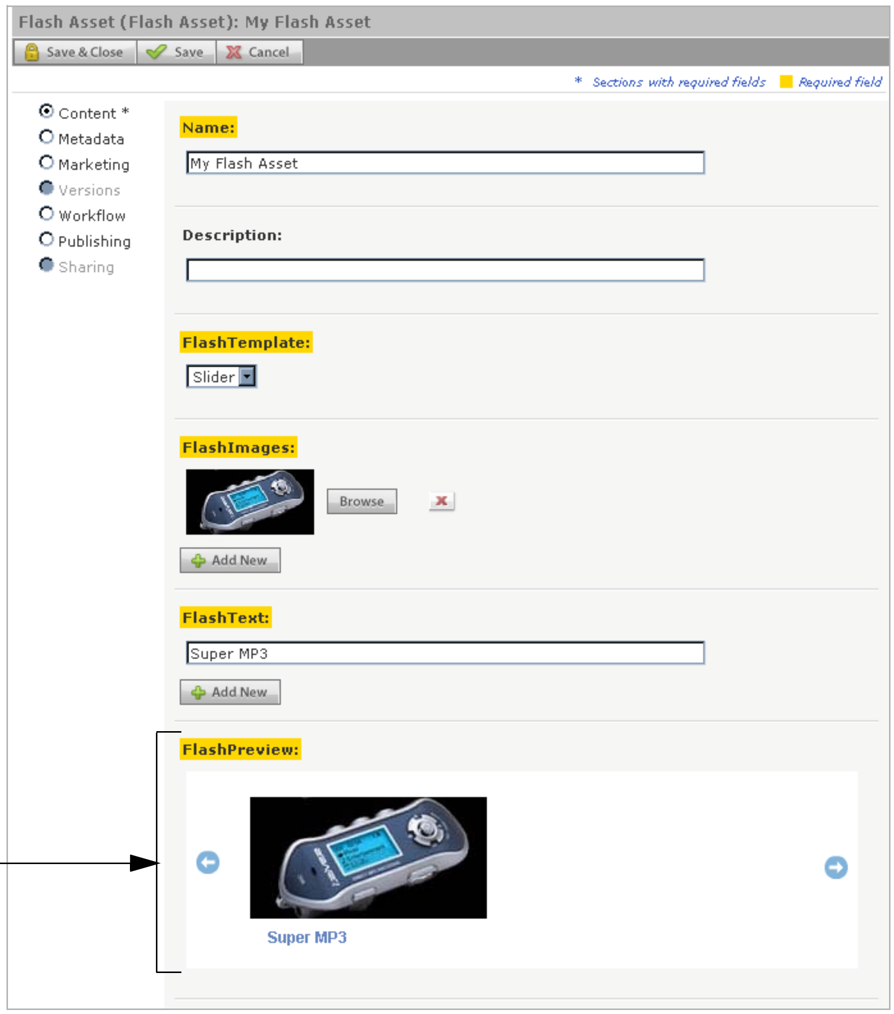
b. In the Image Picker window, find and select the desired image. For instructions, see "Working with the Image Picker" on page 88.

When you select the image, the Image Picker window closes.

c. If you decide that another image is more appropriate, repeat steps a and b to select another image.

6. Enter caption text into the **FlashText** field.

7. Click **Save** to preview the resulting Flash content.



When you click **Save**, the **FlashPreview** field displays a preview of the resulting Flash content.

8. (Optional) To add another image and caption, do the following:

a. In the **FlashImages** field, click **Add New**.

A new **FlashImages** field appears in the form.

b. Repeat step 5 to populate the field with an image.

c. In the **FlashText** field, click **Add New**.

A new **FlashText** field appears in the form.

d. In the new **FlashText** field, enter a supporting caption.

e. (Optional) To change the order in which the captions appear in the Flash content, use the up and down arrow buttons next to the desired **FlashText** field to move it.

9. Fill in all required fields in the form, then click **Save & Close** to save the asset.

10. (Optional) Click **Preview** in the action bar to preview the asset and see the resulting Flash content.

    Content Server opens a new window and displays the asset in its rendered form. Note that for the **Preview** function to work, the asset must have a template assigned to it.

Working with the Date Picker

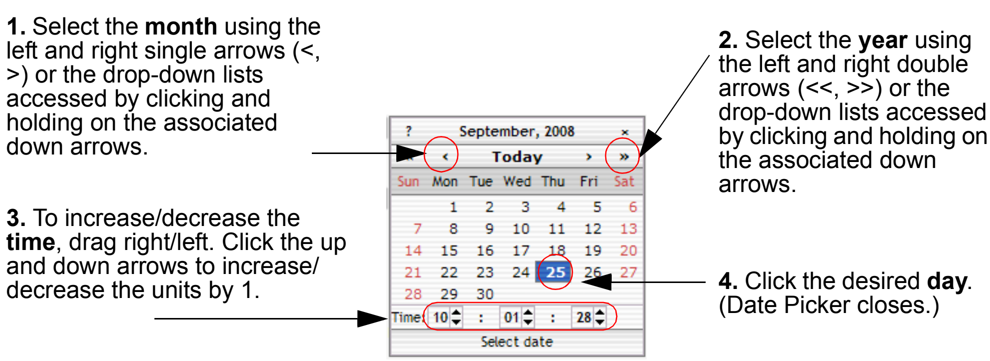
When working with assets whose forms include a date field (such as a post date, release date, start/end date, and so on), you may visually select a date using the Date Picker attribute editor, in addition to the standard text box.

The Date Picker is a calendar-like interface similar to date selectors found in many personal information management applications (for example, Microsoft Outlook).

To enter a date using the Date Picker

1. In the asset's "New" or "Edit" form, scroll to the desired field and click the **Date Picker** icon.

   Content Server opens the Date Picker pop-up window.



2. In the Date Picker pop-up window, select the desired month, year, day, and time. Make sure you select the day last. When you click the desired day, the Date Picker pop-up window automatically closes and the date you selected is reflected in the corresponding field in the asset's "Edit" form.

3. Click **Save** to save your changes to the asset.

Deleting Assets

Use Content Server's delete function to delete assets from the Content Server database. This function allows the deletion of multiple assets at one time, if desired.

When you use the Delete function, the asset is not entirely removed from the database. The contents of the asset are emptied; however, the ID remains in the database as a record of the asset's existence. This simple record is called a "voided asset."

When a previously published asset is voided in the content management system, the voided asset is automatically approved for publishing to any destination the asset has ever been published to. The voided asset is placed in the publish queue, and published during the next publishing session. The voided asset then overwrites the previously published asset.

Voided assets are not returned in search results.

Asset Deletion Rules

The following restrictions are enforced when you delete assets:

- You can delete an asset only if you have the permissions to do so.
- If an asset is in a workflow and is assigned to someone other than you, you cannot delete that asset even if you have the permissions to delete assets.
- You cannot delete a placed "Page" asset.
- You cannot delete an asset if it is associated with another asset. If you attempt to do so, Content Server displays a list of the references preventing deletion. You can then remove the references and continue with the deletion.

Deleting Assets

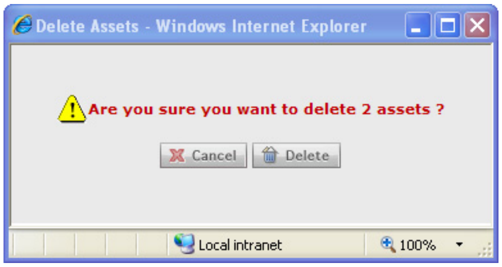
To delete assets

1. Log in to the site you want to work with.
2. Find the asset(s) to delete.
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset(s) and click **Search**.
      - If you previously added the asset(s) to a tag, select the tag that contains the asset(s) in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding and Organizing Assets," on page 101.
3. Delete the asset(s).
   a. In the list of results, navigate to the desired asset.

      Check the check box(es) in the Select column, to the left of the asset(s).
   b. Click **Delete**.

Content Server displays a message asking to confirm the deletion of the asset(s).

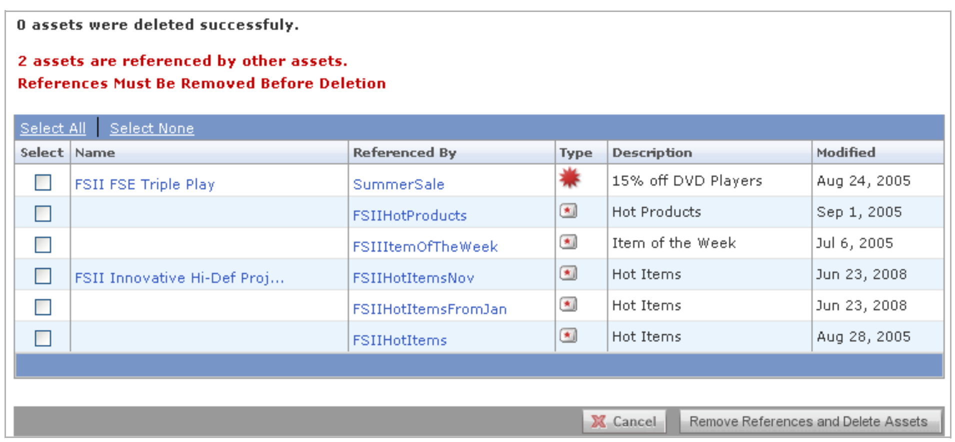


c. If you are sure you want to delete the asset(s), click **Delete**. Otherwise, click **Cancel**.

> **Caution**
>
> Be careful when you delete assets. You cannot “undo” a deletion.

If you clicked Delete and any of the assets you are deleting has dependencies preventing the deletion, Content Server displays a results list identifying those references.

Select the checkboxes of the references that you wish to remove. Click **Remove References and Delete Assets** to remove the references and continue with the deletion. If you do not remove the references to an asset, the asset is not deleted and a message displays to that effect. You have the option of cancelling out of the deletion if you do not wish to remove any of the references at this time.



d. Once the asset(s) is deleted, Content Server’s interface displays a message confirming the deletion was successful. It also displays an updated list of assets returned in step 2; the deleted assets are no longer listed.

The database status of the asset(s) changes to “void.”

Chapter 4

Finding and Organizing Assets

Content Server provides an easy and effective way to find assets you want to work on. Once you find them, you can organize them into personalized lists for easy future access.

This chapter describes the basic procedures for finding and organizing assets, illustrated with examples from the FirstSite II sample site.

This chapter contains the following sections:

- Finding Assets
- Advanced Search Options
- Organizing Assets

Finding Assets

Content Server allows you to easily find assets matching the criteria you specify. Note that search results will include only assets that you have permissions to work with. (Permissions are set by your CS administrator.)

Search Behavior in the Dash Interface

The Dash interface contains search capabilities that differ from those found in the Advanced interface. The differences, due to integration with the Lucene search engine, are as follows:

- Before you can perform searches in the Dash interface, the administrator must enable search indexing on your system (through the Advanced interface).
- The Dash interface allows you to search across all asset types in a given site. You no longer have to know the asset type of the asset(s) you want to find in order to begin a search. You do, however, have the option to limit your search to a specific asset type.
- The Dash interface searches through the names and values of all fields within all assets. For example, you can search for all assets that contain the word **flowers** without having to select specific attribute names to search through.
- The Dash interface allows you to customize your searches by formulating your search queries, as described in "Search Guidelines."

Search Guidelines

When performing searches in the Dash interface, use the guidelines in Table 6 to formulate your search queries. Customizing your search queries allows you to perform more precise searches.

Note that searching in the Dash interface is not case-sensitive. For example, searching for **Jack** will return assets that contain **Jack** and assets that contain **jack**.

Table 6: Lucene search query guidelines

To find...	...do the following	Example
Assets that contain a phrase.	Enclose the phrase in quotes.	To find assets that contain the phrase **blue flowers**, enter **"blue flowers"** as your search query.
Assets that contain variations of a term. (The variations must match the character length of the term.)	Use the **?** (question mark) symbol to indicate a single-character wildcard. A search term cannot begin with a wildcard.	To find assets that contain **test** or **text**, enter **te?t** as your search query. To find assets that contain either **book** or **back**, enter **b??k** as your search query.

Table 6: Lucene search query guidelines *(continued)*

To find...	...do the following	Example
Assets that contain variations of a term. (The variations may or may not match the character length of the term.)	Use the * symbol to indicate a multi-character wildcard. A search term cannot begin with a wildcard.	To find assets that contain **test**, **tester**, or **testing**, enter **test*** as your search query. To find assets that contain **jeanne** or **jeanine**, enter **jea*e** as your search query.
Assets that contain all of the specified terms.	Join the terms with the **AND** operator.	To find assets that contain both **jack** and **jill**, enter **jack AND jill** as your search query.
Assets that contain a specific term but do not contain another term you specify.	Exclude the unwanted terms using the **NOT** operator.	To find assets that contain **jack** but do not contain **jill**, enter **jack NOT jill** as your search query.
Assets that must contain a specific term and may contain another term you specify.	Precede a term with the + (required) operator to indicate it is a required term.	To find assets that must contain **jack** and may contain **jill**, enter **+jack jill** as your search query.
Assets that contain a specific term, excluding assets that also contain another term you specify.	Precede a term with the **-** (prohibited) operator to indicate the exclusion.	To find assets that contain **jack** but exclude those that also contain **jill**, enter **jack -jill** as your search query.
Assets that contain terms similar in spelling to the term you specify.	Append the ~ (tilde) operator to a term to perform a fuzzy search on that term.	To find assets that contain **jack**, including occurrences that are misspelled, enter **jack~** as your search query.

Searching for Assets

> **Note**
>
> The asset types that you can search for are determined by your permissions (set by the CS administrator).

To search for an asset

1. Log in to the site you want to work with.
2. Specify your search criteria. In the top bar, do the following:
   a. (Optional) In the "Search Criteria" drop-down list, select the asset type to which you want to limit your search. If you do not make a selection, Content Server will search across all asset types in the current site.
   b. In the **Search** field, enter the desired search criteria. Refer to "Search Guidelines," on page 102 to find out how to formulate your search query to narrow the scope of your search.
3. Click **Search**.

> **Note**
>
> In the Dash interface, your search results are based on information drawn from a database index which is updated at regular intervals. After creating or editing an asset, there might be a short delay before those changes are reflected in the search results. If you have questions, consult your CS administrator.

Content Server displays the results of your search, sorted by relevance.

Select All | Select None

Select	Tool	Name	Type	Modified	Locale	Start Date	End Date	Relevance
		FSII AudioCo iAC-008 Portab...		11/2/04 3:15 PM		-	-	
		FSII AudioCo iAC-083 Portab...		11/2/04 3:53 PM		-	-	
		FSII FSE Digital Audio Player		11/2/04 3:18 PM		-	-	
		FSII FSE DVD VCR Combo		8/25/05 11:52 AM		-	-	
		FSII FSE Plasma Screen TV		11/3/04 9:03 AM		-	-	
		FSII FSE Triple Play		11/2/04 3:10 PM		-	-	
		FSII Innovative Hi-Def Proj...		11/2/04 3:57 PM		-	-	
		FSII Innovative HiFi VHS		11/2/04 3:32 PM		-	-	
		FSII Innovative MiniDisc Di...		11/2/04 3:50 PM		-	-	
		FSII Superior Hi-Def Plasma...		11/2/04 3:54 PM		-	-	
		FSII Superior Slim DVD Player		11/2/04 3:38 PM		-	-	
		Targaline - FinePix 9.0MP D...		12/12/07 4:38 PM		-	-	
		Nanomax - Digital Camera		12/12/07 8:04 PM		-	-	
		Onsdag - Digital Camera		12/12/07 8:05 PM		-	-	
		Sorama - Flat-Panel LCD HDTV		12/12/07 9:21 PM		-	-	
		Sorama - 40 inch LCD HDTV		12/12/07 9:27 PM		-	-	
		Nanomax Flat-Panel LCD HDTV		12/12/07 9:28 PM		-	-	

> **Note**
>
> In the list of search results, the description, asset type, and locale are represented by icons. Hold your cursor over the **Info** (i) icon to see a tool tip with the asset description, over the **Flag** icon to view the locale, and over any of the various icons in the type column to display the asset's type.

4. (Optional) sort your search results by clicking one of the columns:
   - **Name**
   - **Type**
   - **Modified**
   - **Locale**
   - **Relevance**

> **Tip**
>
> Once your results are sorted, click the same column again to reverse the sort order.

5. If you want to do one of the following, select the check box in the **Select** column next to each asset on which you want to perform the desired operation:
   - Add assets to a tag — proceed to step 5 in "Adding Assets to a Tag" on page 109.
   - Remove assets from a tag — proceed to step 5 in "Removing Assets from a Tag" on page 110.
   - Delete assets — proceed to step 3 in "Deleting Assets" on page 97.

Navigating Through Your Search Results

The search results list displays 25 matching assets per page of results. If your search returns more than 25 assets, you can:

1. Go to the next page of search results by clicking **Next *xx*** in the top right corner of the search area, where ***xx*** is the number of assets that will be displayed on the next page.

2. Go back to the previous page of search results by clicking **Previous *xx***, where ***xx*** indicates the number of assets displayed on the page of search results preceding the currently displayed page.

3. Jump to a specific page of results by selecting the corresponding asset range in the drop-down list located between the **Previous *xx*** and **Next *xx*** hyperlinks. For example, if your search returned 36 assets and you want to jump to the results page displaying assets 26–36, select **26–36 of 36** from the drop-down list.

Saving the Results of Your Search

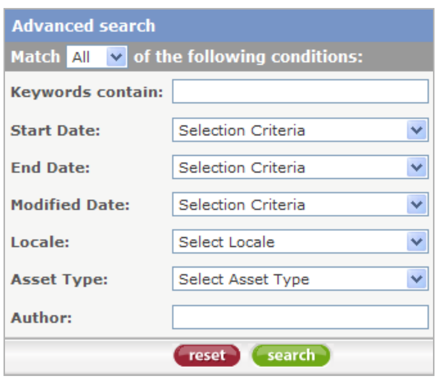
To save the results of the search you performed, proceed to step 4 of the procedure, "Adding Assets to a Tag," on page 109.

Advanced Search Options

In advanced searches, you can search by creation date, the start and end date, locale, and the asset's type — or any combination of these items. Your administrator may provide even more search options.

To perform an advanced search for an asset

1. Log in to the site you want to work with.
2. In the top bar, click **Advanced Search.**
3. In the Advanced search dialog box, fill as many of the fields that follow as you need to narrow your search:



   a. Specify how to match search conditions:
      1) To have your search results match *all* the search criteria you select, choose **All** from the **Match Of the Following Conditions** drop-down list.
      2) To have your search results match *any one* of the search criteria you select, choose **Any** from the **Match of the Following Conditions** drop-down list.

   b. In the **Keywords Contain** text box, enter words or phrases to search for. The same options described in "Search Guidelines," on page 102, may be used in this field.

   c. Choose a **Start Date, End Date,** and/or **Modified Date** by entering a date using the calendar selectors to fill in these text boxes.

      Start Date and **End Date** are the first and last dates that the asset is displayed on the delivery web site. See "About Start and End Dates," on page 146 for more information.

      Modified Date indicates the date the asset was last edited.

   d. If your company tracks multilingual content using Locales, you can limit your search to assets in a selected location by choosing an option from the **Locale** drop down list. For more information about managing multilingual content and the locale field, see "Working with Multilingual Assets," on page 113.

e. Search only assets of a particular type by selecting an item from the **Asset Type** drop down list.


Select All | Select None

Select	Tool	Name	Type	Modified	Locale	Start Date	End Date	Relevance
		FSII AudioCo iAC-008 Portab...		11/2/04 3:15 PM		-	-	
		FSII AudioCo iAC-083 Portab...		11/2/04 3:53 PM		-	-	
		FSII FSE Digital Audio Player		11/2/04 3:18 PM		-	-	
		FSII FSE DVD VCR Combo		8/25/05 11:52 AM		-	-	
		FSII FSE Plasma Screen TV		11/3/04 9:03 AM		-	-	
		FSII FSE Triple Play		11/2/04 3:10 PM		-	-	
		FSII Innovative Hi-Def Proj...		11/2/04 3:57 PM		-	-	
		FSII Innovative HiFi VHS		11/2/04 3:32 PM		-	-	
		FSII Innovative MiniDisc Di...		11/2/04 3:50 PM		-	-	
		FSII Superior Hi-Def Plasma...		11/2/04 3:54 PM		-	-	
		FSII Superior Slim DVD Player		11/2/04 3:38 PM		-	-	
		Targaline - FinePix 9.0MP D...		12/12/07 4:38 PM		-	-	
		Nanomax - Digital Camera		12/12/07 8:04 PM		-	-	
		Onsdag - Digital Camera		12/12/07 8:05 PM		-	-	
		Sorama - Flat-Panel LCD HDTV		12/12/07 9:21 PM		-	-	
		Sorama - 40 inch LCD HDTV		12/12/07 9:27 PM		-	-	
		Nanomax Flat-Panel LCD HDTV		12/12/07 9:28 PM		-	-	

Organizing Assets

Content Server allows you to organize assets into groups by adding them to tags. Tags are keywords which you use to label assets sharing one or more common factors (for example, a theme or topic). By adding assets to tags, you create personalized lists of assets that you can easily retrieve in the future. For example, you can create a tag named "My Articles" and use it to maintain a list of all "Article" assets you have created so far.

You can add and delete assets to and from a tag at any time. When you run a tag, Content Server returns a list of assets assigned to that tag. An asset can be assigned to more than one tag. If you delete a tag, all assets assigned to that tag are automatically disassociated from the tag before it is deleted.

Note

You can use tags only for managing and organizing your work. You cannot use tags to group assets for delivery purposes.

Types of Tags

Content Server supports the following types of tags:

System Tags

System tags are pre-defined tags that help you keep track of your workload. They are displayed under the **System** node in the **Tags** tree, as follows:

- **My Checkouts** — returns a list of assets currently checked out to you.
- **My Assignments** — returns a list of assets presently assigned to you in the current site via one or more workflow processes.
- **History** — returns a list of assets you have worked on during the current session. This list is cleared every time you switch sites or log out of Content Server.

You cannot create, modify, or delete system tags.

User Tags

User tags allow you to create personalized lists of assets by saving the results of your searches. You can create, add assets to, remove assets from, rename, and delete user tags, assuming you have the appropriate permissions.

Note

User tags are user- and site-specific; in other words, the tags you create in a given site will be accessible only to you and only within that site.

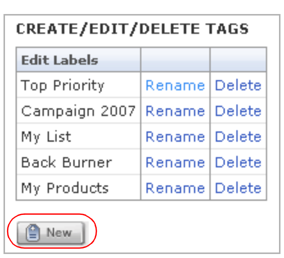
Creating a Tag

Before you can add assets to a tag, you must first create the tag that will store them.

To create a new tag

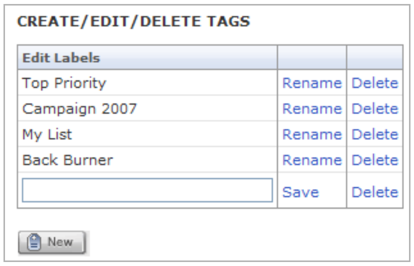
1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. Click **Edit** at the top of the navigation pane.

   The Create/Edit/Delete tags pane opens.

4. Click **New**.

A new row in the table appears with a blank text box.



5. Fill in the text box with the new tag label. Click the **Save** link next to the label.

   The new tag appears under the **User** node in the **Tags** tree and in the Create/Edit/Delete tags table.

6. Continue to "Adding Assets to a Tag," on page 109 to assign assets to this tag.

Adding Assets to a Tag

By adding assets to a tag, you can save your search results and create personalized lists of assets for easy retrieval at a later time. The tag can either be a new tag, or a tag you have used before.

To add assets to a tag

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. Perform a search, as described in "Finding Assets," on page 102.
4. In the search results, select the check box next to each asset you want to add to a tag.
5. In the "Add To…**"** drop-down list, select the tag you want to add the assets to.

   Content Server adds the selected assets to the tag you chose.

Running a Tag

Run a tag to retrieve the list of assets you have stored in the tag.

To run a tag

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. In the **Tags** tree, click the desired tag.

   Content Server displays a list of assets returned by the tag.

   Note

   In the list of assets, the asset type and locale are represented by icons. Hover your mouse cursor over the icon to see the name of the asset type or locale.

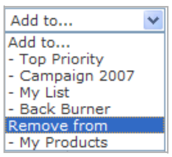
Removing Assets from a Tag

If you decide that an asset no longer belongs to the tag to which it is assigned, you can remove it from the tag.

To remove assets from a tag

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. In the **Tags** tree, select the tag from which you want to remove one or more assets.

   Content Server displays a list of assets currently assigned to the selected tag.
4. In the "Select" column, select the check boxes next to the assets you want to remove from the tag.
5. In the "Add To..." drop-down list, scroll to the "Remove from..." section, and select the tag from which you want to remove the selected assets.



   Content Server removes the assets from the tag and refreshes the asset list to reflect the change.

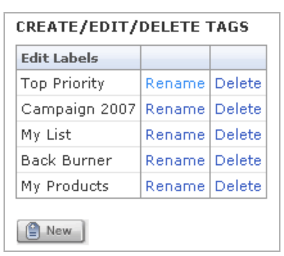
Renaming a Tag

This section shows you how to rename a tag.

To rename a tag

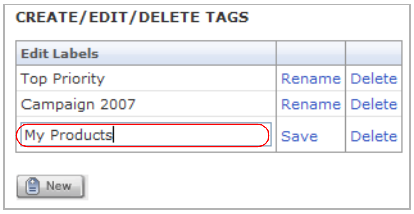
1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. Click **Edit** at the top of the navigation pane.

   Content Server displays a list of tags you have created so far in the current site.



4. In the list of tags, locate the tag you want to rename, and click its **Rename** link.

The name of the tag becomes an editable field.



5. Make your changes, then click **Save**.

   Content Server redisplays the list of tags, showing the changes you have made.

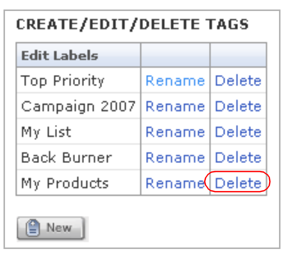
Deleting a Tag

When you delete a tag, all assets assigned to the tag are automatically removed from the tag before it is deleted.

To delete a tag

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. Click **Edit** at the top of the navigation pane.

   Content Server displays a list of tags you have created so far in the current site.



4. In the list of tags, locate the tag you want to delete, and click its **Delete** link.

   Content Server deletes the tag and redisplays the list of tags, showing your changes.

Chapter 5

Working with Multilingual Assets

This chapter shows you how to work with localized assets and multilingual asset sets.

This chapter contains the following sections:

Overview

Very often, organizations maintain one or more localized online sites that serve different geographic regions. Such sites will host content in one or more languages local to the region served by the site. In such cases, a piece of content can be translated to exist in multiple languages, or **locales**.

If two or more locales are set up on your site, you can translate assets into the languages that are enabled by the locales. When you create the first translation of an asset, the asset and its translation become a **multilingual set**, and the source asset is automatically designated as the **master asset** of the set. Once an asset is designated as the master of a set, it remains so until you designate another member of the set as the master.

You can create subsequent translations either from the master asset, or from an existing translation. The master asset and its translations are linked to one another to indicate they are members of the multilingual set. Each member contains the same piece of content but in a different language. You can not delete the master asset if at least one translation exists in the set. You will have to delete all of the translations linked to the master asset before you can delete it.

Each asset can have only one translation in each available language. For example, once a Canadian French translation of an asset exists, you cannot create another Canadian French translation within the same multilingual set.

To create a translation of an asset, you must do the following:

1. Select the target language of the translation. Content Server does the following:
   a. Creates a copy of the source asset
   b. Sets the target language of the copy according to your selection
   c. Links the copy to the master asset and marks the copy as a translation of the master. If this is the first translation of the asset, a multilingual set is created and the source asset is designated as the master.
2. Translate the source content and store the translated content in the translation asset.
3. (Optional) Translate the assets associated with the source asset and associate the translated versions with the translation of the source asset. See Table 7, on page 115 for information on how asset relationships are handled when you create translations of assets.

Note

Before performing the procedures in this chapter, note the following:

- Your CS interface will contain locale-related functionality only if the administrator has set up your site to support multiple languages.
- If you plan to work with content in a language that uses non-English characters, your machine must be configured for input and display of such characters.

If you have any questions, contact your CS administrator.

Table 7: Asset relationship behavior for multilingual assets

Relationship Type	Behavior
Named and Unnamed Associations	When you create a translation of an asset that contains named or unnamed associations, all assets associated with the source asset are automatically associated with the translation. You then have the choice to translate the associated assets and associate the translated versions with the translated parent asset.
Static Lists Recommendations	When you create a Static Lists recommendation in a new locale, the new “Recommendation” asset retains the member assets of the source asset. You then have the choice to translate the member assets and place the translated versions in the new “Recommendation” asset, replacing the member assets carried over from the old collection.
Asset-Type Attributes	When an asset containing associations through asset-type attributes is translated, all assets associated with the source asset are automatically associated with the translation. You then have the choice to translate the associated assets and associate the translated versions with the translated parent asset.
Embedded Links	Embedded links are not affected. When an asset containing embedded links is translated, you must manually update the links to point to the corresponding translations of the linked content (if they exist).

For more information, see “Working with Asset Associations,” on page 156.

Note

If you want to share a localized asset to another site, the locale assigned to the asset must be enabled on the target site. If you have questions about locales, contact your CS administrator.

Setting or Changing an Asset's Locale Designation

Before you can create a translation of an asset, the asset must have a locale designation assigned to it. (Typically, you assign the locale designation when you create an asset.)

If you want to create a translation of an asset that has no locale designation, follow the steps below, then continue on to step 3 of the next section, "Creating a Translation of an Asset," on page 117.

You can also change the locale designation of an asset that already has one assigned to it, if necessary. For example, if the administrator decides to further divide the asset's locale (such as dividing French into Canadian French and Belgian French) you can update your assets to use the new locale designations.

Note

You can only assign locales that have been enabled on your site by the CS administrator.

To set or change an asset's locale designation

1. Log in to the site you want to work with.
2. Find and open the asset whose locale designation you want to set or change:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

   Content Server displays the asset in the "Inspect" form.
3. Set or change the asset's locale designation:
   a. Switch to the **Metadata** section of the form by clicking **Metadata** in the form section selector.
   b. In the action bar, click **Edit**.

      Content Server displays the asset in the "Edit" form.
   c. In the "Locale" drop-down list, select the desired locale.
   d. In the action bar, click **Save & Close**.

      Content Server displays the asset in the "Inspect" form, showing the new locale.
   e. (Optional) If your next step is to create a translation of the asset, switch back to the **Content** section of the "Inspect" form by clicking **Content** in the form section selector, and proceed to step 3 of the next section, "Creating a Translation of an Asset," on page 117.

Creating a Translation of an Asset

Note

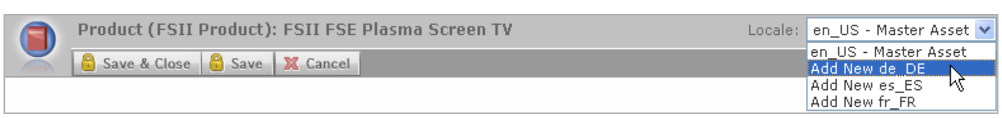
- Before you can create a translation of an asset, the asset must have a locale designation already assigned to it. (The asset's locale is listed in the **Metadata** section of the asset form and is typically assigned by the user who creates the asset.) If the asset does not have a locale designation, follow the steps in "Setting or Changing an Asset's Locale Designation," on page 116, then skip to step 3 of this procedure.
- If you are creating the first translation of an asset, you are automatically creating a multilingual set consisting of the source asset and the translation. The source asset will be automatically designated as the master asset of the multilingual set.

To create a translation of an asset

1. Log in to the site you want to work with.
2. Find and open the asset for which you want to create a translation:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is not already visible, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

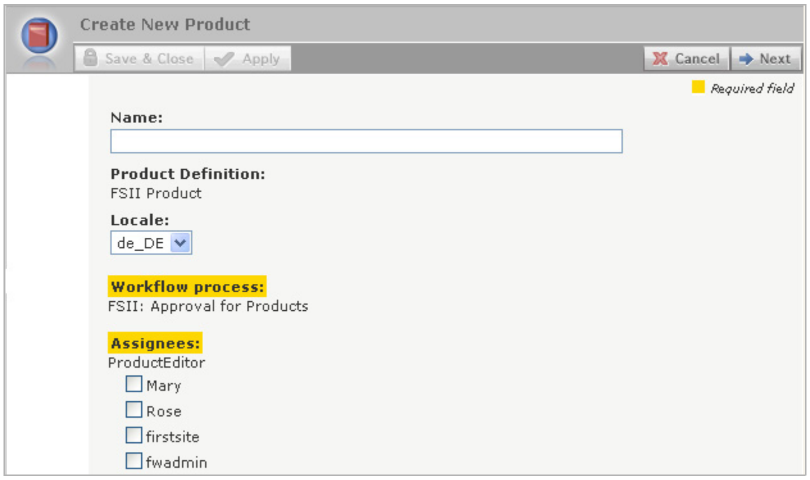
   Content Server displays the asset in the "Inspect" form.
3. Set the target language of the translation. In the "Locales" drop-down list in the action bar, select **Add new *locale***, where ***locale*** is the target language.



Note

If the "Locales" drop-down list is not displayed, stop here. You do not have the permissions to translate the asset, or your site has less than two locales set up. If you have questions about locales or your permissions, contact your CS administrator.

Content Server displays the "Create New *Asset*" form:



4. In the "Create New *Asset*" form, do the following:

a. In the **Name** field, enter a name that uniquely identifies the new asset as a translation of the source asset.

Note the following conventions when naming the asset:

- The name must be between 1 and 64 alphanumeric characters.
- The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), question mark (?), percent sign (%), less-than sign (<), and greater-than sign (>).
- The name can contain spaces, but cannot start with a space.

b. (Optional) If the administrator configured the asset type such that all new assets of that type are placed into workflow upon creation, you will see the following fields:

- The **Workflow Process** field, showing the pre-assigned workflow process
- The **Assignees** field, listing possible assignees for each role required by the process

You must select at least one assignee for each role to proceed with the creation of the asset. Any of these users can complete the next step in the workflow process.

For more information, see Chapter 12, "Workflow."

c. Click **Next**.

An "Edit" form containing the fields and values of the source asset appears.

5. Translate the asset as follows:

Save your work as you go. Click **Save** to save your progress as you work on the asset. When you click **Save**, Content Server commits the changes to the database and keeps the asset open in the "Edit" form so that you can keep working.

If any of the fields or form sections are unfamiliar to you, consult your developers or CS administrator.

a. For each field, replace the copied content with an appropriate translation.

b. Make your changes in the "Edit" form.

   See step 4 on page 78 for details on filling in the fields on this form.

c. Click **Next** to populate the next section. Continue until you have populated all required sections (marked with an asterisk). Populate other sections as necessary.

6. Save the asset by clicking **Save & Close**.

   When you save the asset, Content Server displays the asset in the "Inspect" form, unless:

   - You have left out one or more required fields in one or more sections
   - An entry or selection you have made in is not permitted

   If either of these conditions is true, Content Server displays an error message indicating the offending fields. Correct the errors, then click **Save & Close**.

7. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section "Assigning an Asset to a Workflow," on page 226.

8. (Optional) If you want to see how the asset would look if it were published, you can preview it. To do so, click **Preview** in the action bar at the top of the asset's "Inspect" form. A new window opens and displays the asset in its rendered form. (Note that for the preview function to work, the asset must have a template assigned to it.)

   When you are finished previewing the asset, close the preview window.

9. Review the assets associated with the translation asset to determine which associated assets need to be translated into the target language.

   a. Switch to the **Relations** section of the form.

   b. Review the assets associated with the translation asset and determine which ones need to be translated.

      When you create a translation of an asset, the assets associated with the source asset are automatically associated with the translation asset.

      Depending on the nature of the associated assets, you may want to translate them and associate the translated versions with the translation asset you created in the previous steps. For example, an image depicting a product might not require a localized version, but a data sheet for the product will need to be translated.

      See Table 7, on page 115 for information on how Content Server handles asset relationships with respect to multilingual assets.

   c. (Optional) If in step b you determined that one or more assets associated with the translation asset have to be translated, translate each asset requiring translation by repeating this procedure, then follow the steps in "Associating Assets," on page 158 to associate the translated versions with the translation asset you created in the previous steps.

Examining the Available Translations of an Asset

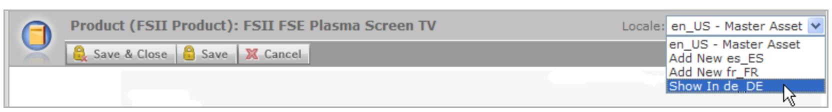
If you want to check if a translation of an asset exists in a specific language, open the asset and examine the "Locales" drop-down list in the action bar. If the desired translation exists for a given language, you can open it by selecting it from the drop-down list.

To check whether a specific translation of an asset exists

1. Log in to the site you want to work with.
2. Find and open the asset whose translations you want to examine:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is not already visible, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Examine the contents of the "Locales" drop-down list in the action bar. If a translation in a given language exists, you will see a **Show in *language...*** entry for that language in the drop-down list.



Note

If the drop-down list does not contain a **Show in *language...*** entry for the desired language, stop here. The asset has not yet been translated into that language. You can translate the asset by following the steps in "Creating a Translation of an Asset," on page 117.

4. (Optional) If you want to open a specific translation of the asset for viewing, select the corresponding **Show in *language...*** entry from the "Locales" drop-down list.
5. (Optional) If you want to compare the asset to one of its translations, follow the instructions in step 4 on page 121.

Comparing Translations of an Asset

When multiple translations of an asset exist in the current site, you can compare two of the translations side by side and choose to edit one of them.

To compare two translations of an asset

1. Log in to the site you want to work with.
2. Find and open the asset whose translations you want to compare:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. (Optional) If you want to make changes to the selected asset while comparing it to another translation, click **Edit** in the action bar. (For more information, see "Editing Assets," on page 84.)

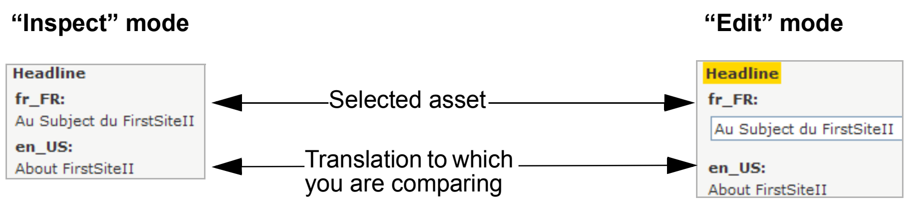
   Content Server displays the asset in the "Edit" form.
4. Toggle the locale "Compare" mode on and choose the translation to which you want to compare the selected asset.
   a. In the action bar, select the **Compare** check box.

      Note

      If you do not see the Compare check box, stop here. No translations of the asset you are viewing exist yet. You can translate the asset by following the steps in "Creating a Translation of an Asset," on page 117.

      The "Compare Locale" drop-down list appears in the action bar.
   b. In the "Compare Locale" drop-down list, select the translation you want to compare to the selected asset.

The asset form switches to the locale “Compare” mode. In this mode, each field is shown twice: the selected asset (on top), followed by the translation to which you are comparing.



5. (Optional) If you opened the asset for editing in step 3, make your changes, then click **Save & Close**.

> **Note**
>
> If for some reason you want to discard the new asset, click **Cancel**.
>
> Note that if you used the **Save** button to save your progress while working on the asset, clicking **Cancel** will only discard the changes you have made since the last time you clicked **Save**. This is because the asset is saved to the database the first time you click **Save**. In such cases, you cannot discard the asset by clicking **Cancel**.

When you save the asset, Content Server displays the asset in the “Inspect” form, unless:

- You have left out one or more required fields in one or more sections
- An entry or selection you have made in is not permitted

If either of the above is true, Content Server displays an error message indicating the offending fields. Correct the errors, then click **Save & Close**.

Changing the Master Asset of a Multilingual Set

When you create the first translation of an asset, the source asset becomes the master asset of a multilingual asset set consisting of the asset itself and its translation. As more translations of the source asset are created, the multilingual set grows.

If you need to designate another member of the set as the master (for example, when the multilingual set is copied to a site in another language), you can do so from the "Inspect" form of any member of the set.

The following procedure shows you how to set a new master asset from the "Inspect" form of the set's current master asset.

To change the master asset of a multilingual set

Note

Note the following:

- The master asset of a multilingual set is indicated in the "Locales" drop-down list in the action bar.
- If a multilingual set is being revision-tracked, you must manually check out all members of the set before you can change the set's master asset. For instructions, see "Checking Out Assets," on page 249.

1. Log in to the site you want to work with.
2. Find the master asset of the multilingual set:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on searching, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Open the translation which you want to designate as the new master asset. In the "Locales" drop-down list, select **Show in *language...*** where *language* is the locale of the desired translation.

   Content Server displays the selected translation in the "Inspect" form.
4. In the action bar, click **Make Master**.

   The currently open translation asset is designated as the master of the multilingual set it belongs to.

Chapter 6

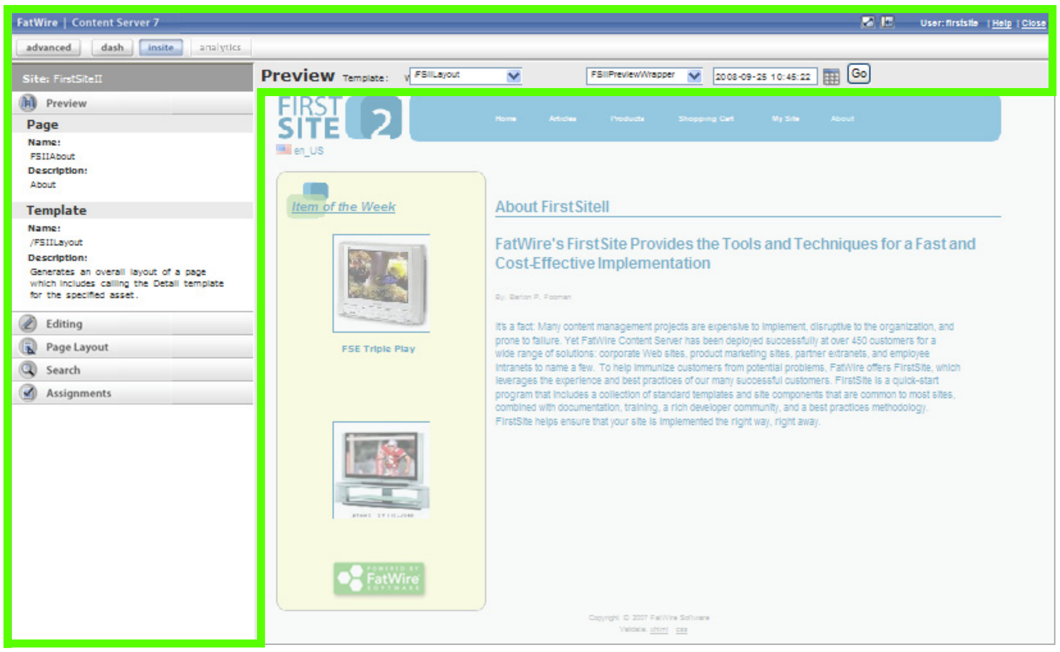
Working with the InSite Interface

This chapter describes how to use the InSite interface to add, edit, replace, and position content directly on a rendered page.

This chapter contains the following sections:

Overview

Business users who do not ordinarily work in Content Server's interfaces, but who occasionally need to approve or make changes to content, can do so directly on a rendered page, using the InSite interface. The InSite interface provides access to Content Server's most commonly used content management functions, and is displayed alongside the rendered page, as follows:



Note

The examples in this section are based on the FirstSite II sample site. Depending on how your site is set up, your interface may differ from the depictions in this section.

The InSite interface allows you to preview, edit, add, remove, replace, and position content directly on a rendered page. To accomplish these tasks, you work on content in one of the following modes:

- **Preview** – allows you to see how the content would look on the online site. For more information, see "Previewing Assets," on page 128.
- **Editing** – allows you to edit content directly on a rendered page. For more information, see "Editing Assets in the InSite Interface," on page 131.
- **Page Layout** – allows you to add, remove, replace, and position content on a page. For more information, see "Managing Page Content Using the InSite Interface," on page 134.

Additionally, you can access the following functions through the InSite pane:

- **Search** – allows you to find other assets you want to work with in the InSite interface. For instructions, see "Searching for Assets Using the InSite Interface," on page 140.
- **Assignments** – allows you to finish your workflow assignments. For instructions, see "Finishing Your Workflow Assignments Using the InSite Interface," on page 141.

Accessing the InSite Interface

Note

To use the InSite interface, the following conditions must be satisfied:

- You must have the appropriate permissions.
- You must be using a supported browser.
- The template used to display the asset you want to work on (and the asset's parent page, if applicable) must support InSite functionality.

Consult your CS administrator or site developers if you have any questions.

You access the InSite interface by previewing an asset. Once you have previewed the asset, you can use the InSite interface to perform other content management tasks.

You can preview an asset in several ways. For example:

- Use the search feature of the Dash interface to find the desired asset, then preview it.
- Drill down the **Site Plan** or **Asset** tree in the navigation pane to open the desired asset, then preview it.
- Obtain the InSite URL for the asset from another user or your CS administrator. For example, your colleague would e-mail you the InSite URL for an asset he or she has worked on, so that you can review it or make changes, depending on your permissions.

Note

Use the **Get Link** function to obtain the InSite URL for an asset. Once you have the URL, you can give it to another user so that he or she can work on the asset in the InSite interface (assuming the user has the appropriate permissions). For more information, see "Obtaining the InSite URL for an Asset," on page 144.

When you access the InSite URL, you will be prompted to log in. Once you log in, the InSite interface displays the asset in "Preview" mode.

Note

There are a number of ways to preview an asset. Procedures in this chapter are based on the assumption that you are previewing an asset as described in the next section, "Previewing Assets."

Previewing Assets

Previewing an asset displays the asset in its rendered form in the InSite interface.

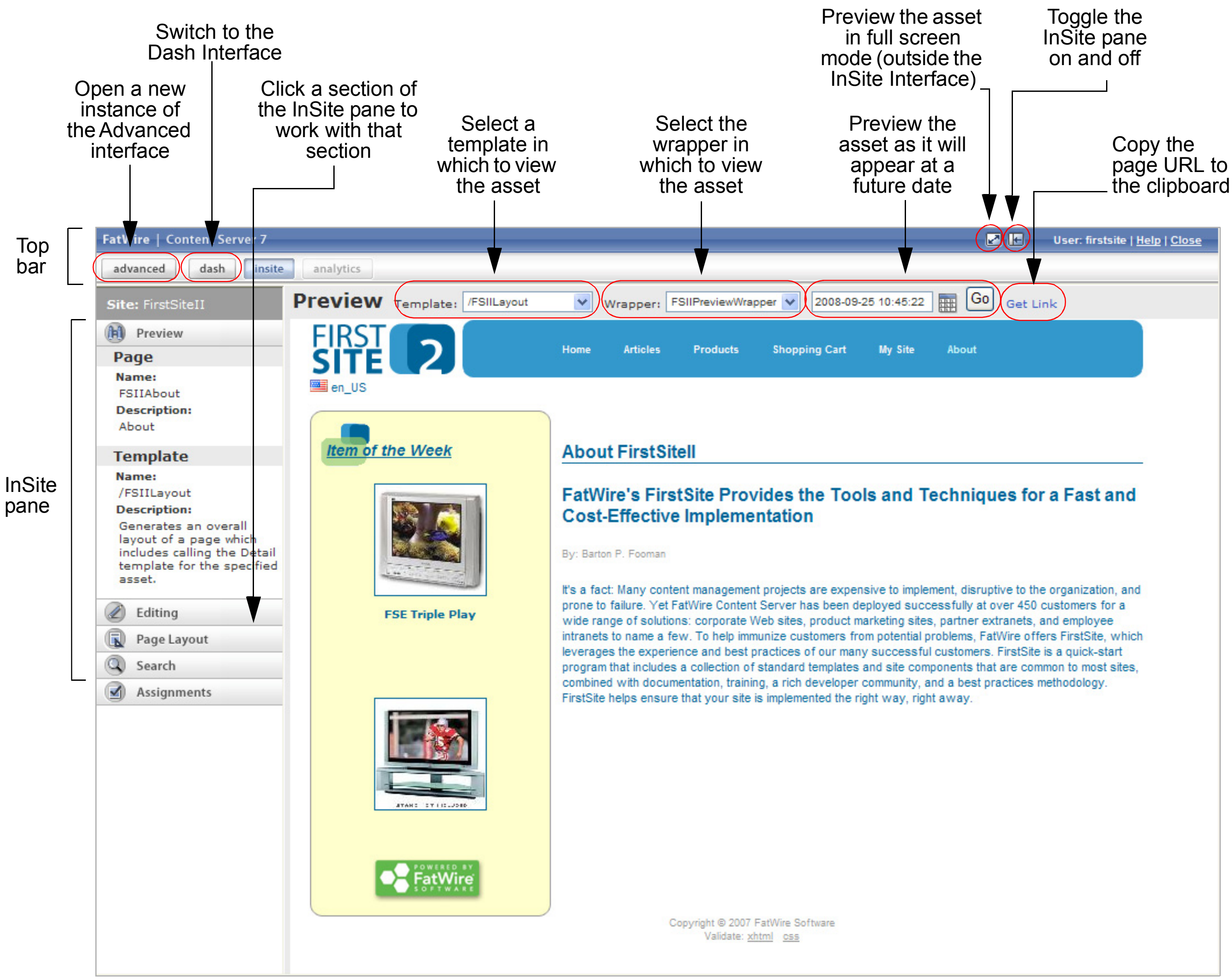
To preview an asset

1. Log in to the site you want to work with.
2. Find and open the asset you want to preview. Do the following:
   a. (Optional) If you want to limit your search to a specific asset type, select the asset type from the "Search Criteria" drop-down list.
   b. In the **Search** field in the top bar, enter the desired search criteria and click **Search**.

      For more information on searching, see "Finding Assets," on page 102.
   c. In the list of results, navigate to the desired asset and click the **Preview** (binoculars) icon to the left of the asset's name.

      Content Server opens a new browser window and displays the selected asset in the InSite interface.

Here is an example view of the InSite interface showing the FirstSite II home page in “Preview” mode:



The InSite interface contains the following components, as shown in the above figure:

- **InSite pane** – displays the type, name, and template (including descriptions) of the asset you are working with; allows you to switch between InSite modes (“Preview,” “Editing,” or “Page Layout”), search for assets, and finish your workflow assignments.
- **Top bar** – allows you to open a new instance of the Advanced interface; preview the asset without displaying the InSite interface; toggle the InSite pane on and off; access the FatWire Support site; and end your InSite session.
- **InSite bar** – denotes the InSite mode you are working in; allows you to obtain the InSite URL of the displayed asset, and view the asset using alternate templates, wrappers, and dates.

3. (Optional) If you wish to see how the asset would look when rendered by a different template or wrapper, select a template from the "Template" drop-down list, and/or a wrapper from the "Wrapper" drop-down list in the InSite bar. Consult your site developers for information on the templates and wrappers available to you.
4. (Optional) To view how the page will appear at a future date, use the date picker to enter a future date, then click **Go** to update the preview pane.
5. Once you have previewed the asset, you can perform the following tasks:
   - Edit the asset using the "Editing" mode. For instructions, see "Editing Assets in the InSite Interface," on page 131.
   - If the asset you are previewing is assigned to a page (or is a page): add, remove, replace, and position content on the page using the "Page Layout" mode. For instructions, see "Managing Page Content Using the InSite Interface," on page 134.
   - Find other assets to work on in the InSite interface. For instructions, see "Searching for Assets Using the InSite Interface," on page 140.
   - Finish your workflow assignments. For instructions, see "Finishing Your Workflow Assignments Using the InSite Interface," on page 141.
   - Obtain the InSite URL for the asset. For instructions, see "Obtaining the InSite URL for an Asset," on page 144.

Editing Assets in the InSite Interface

To edit an asset in the InSite interface

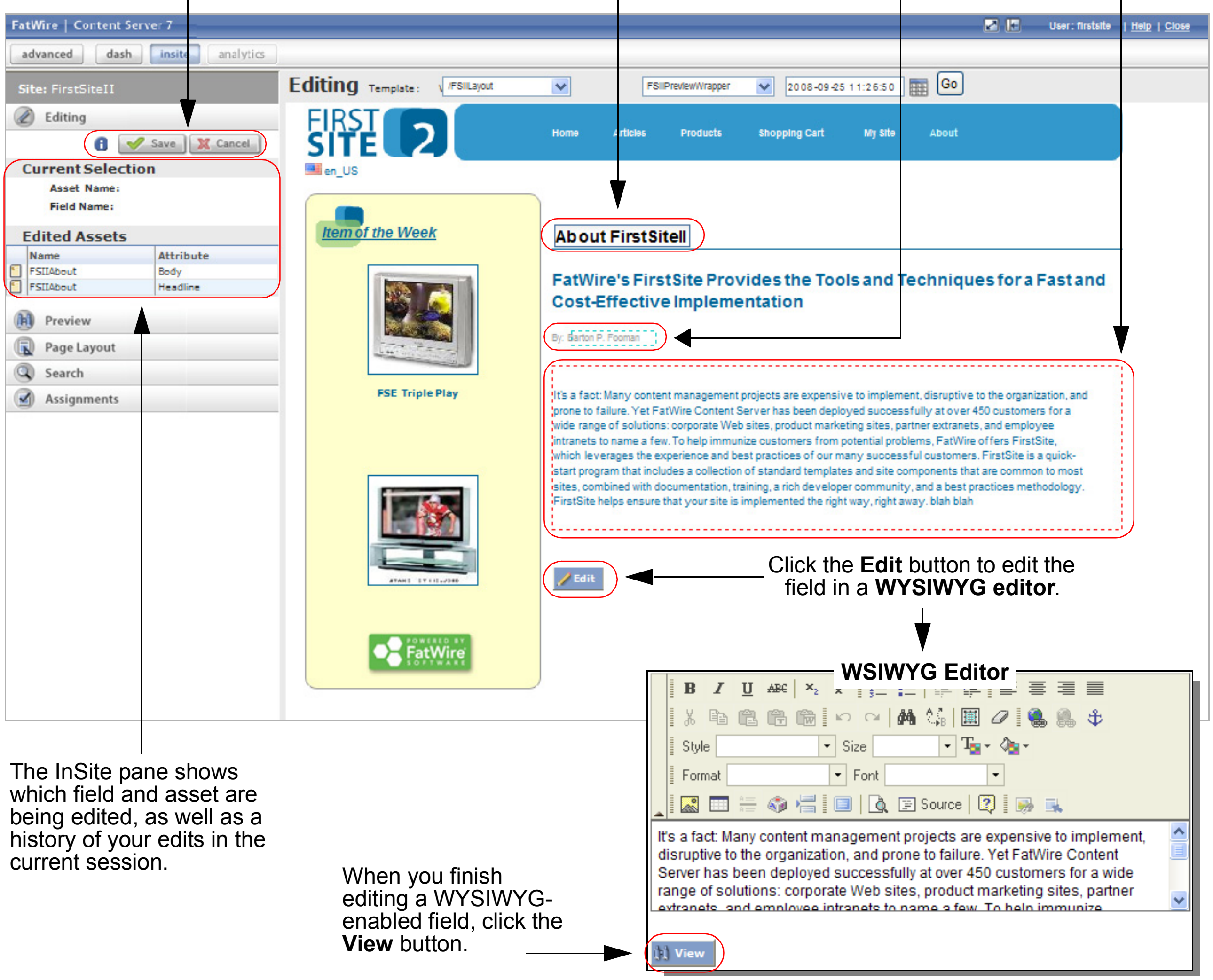
1. Make sure the template assigned to the asset you want to edit supports InSite Editing. Consult your site designers if you have any questions.
2. Preview the asset, as described in "Previewing Assets," on page 128.
3. In the InSite pane, click **Editing**. The InSite interface switches to the "Editing" mode.
   - If you dashed outlines around the fields, as shown below, the asset is editable in the InSite interface. Proceed to the next step.
   - If you do not see dashed outlines around the fields stop here. The asset's template does not support InSite Editing. For more information, consult your developers.

Click **Save** to commit your changes to the database, or **Cancel** to discard them.

The solid blue outline indicates the field is being edited. When finished, click out of the field to save.

The cyan dotted outline indicates the field has not yet been edited. Click in the field to edit it. When finished, click out of the field to save.

The red dotted outline indicates the field has been edited.



The InSite pane shows which field and asset are being edited, as well as a history of your edits in the current session.

When you finish editing a WYSIWYG-enabled field, click the **View** button.

4. (Optional) If you would like to view the asset using a template other than the one assigned to the asset, select a template from the “Template” drop-down list in the InSite bar. Consult your site developers for information on the templates available to you.

5. Click into the field of your choice and make changes to the contents of the field. The difference between the dashed outlines and the **Edit** button is as follows:

   - The dashed outline indicates a simple text field. When you click in a field with a dashed outline, you can make edits to the text within the field. You cannot, however, alter the appearance of the text.
   - The **Edit** button indicates a field that can be edited in an embedded WYSIWYG editor (such as FCKEditor). When you click the **Edit** button, the WYSIWYG editor replaces the field and displays the field’s contents in editable form. You can then make your edits to both the text and its appearance. (See “Working with the FCKEditor,” on page 86 for more information.)
   - The **Edit Asset** button next to an image indicates that the image can be edited in the Clarkii Online Image Editor (Clarkii OIE). Click the button to open the image asset’s “Edit” form in a pop-up window and edit the image in Clarkii OIE. For instructions, see “Working with the Clarkii Online Image Editor,” on page 91.
   - The **Edit Asset** button next to a piece of Flash content indicates that the content can be edited by following the steps on page 105 in the *Content Server Advanced Interface User’s Guide*. Clicking the button opens the Flash content asset’s “Edit” form in a pop-up window.

   The InSite pane shows the name of the field you are currently editing, and the asset to which the field belongs. It also shows a history of assets you have edited during your current InSite session.

   Note

   When making your changes, keep the following in mind:

   - The button that invokes the “Edit” form for image and Flash assets in the InSite interface is generated by the `insite:editasset` tag and will display the label chosen by your developers. Our example uses the default label **Edit Asset**.
   - To make your job easier, toggle off the InSite pane to maximize the visible area on the page. Toggle the pane back on when you are ready to commit your changes to the database. (Use the **Toggle InSite Pane** button near the right end of the top bar to toggle the pane off and on.)
   - If an editable field is protected by revision tracking, a “lock” icon replaces the dashed outline to indicate that the field cannot currently be edited.
   - When you are finished editing a field, click out of the field to return the field to the view-only state. While not required, doing so will help you keep track of the changes you make as your work progresses.

6. When you are finished making your changes, click **Save** in the InSite pane to commit your changes to the CS database. If you click **Cancel**, your changes will be discarded and the asset redisplayed in its unmodified state.

7. (Optional) If you would like to work on another asset using the InSite interface, find the asset by performing the steps in "Searching for Assets Using the InSite Interface," on page 140, and repeat this procedure.

Managing Page Content Using the InSite Interface

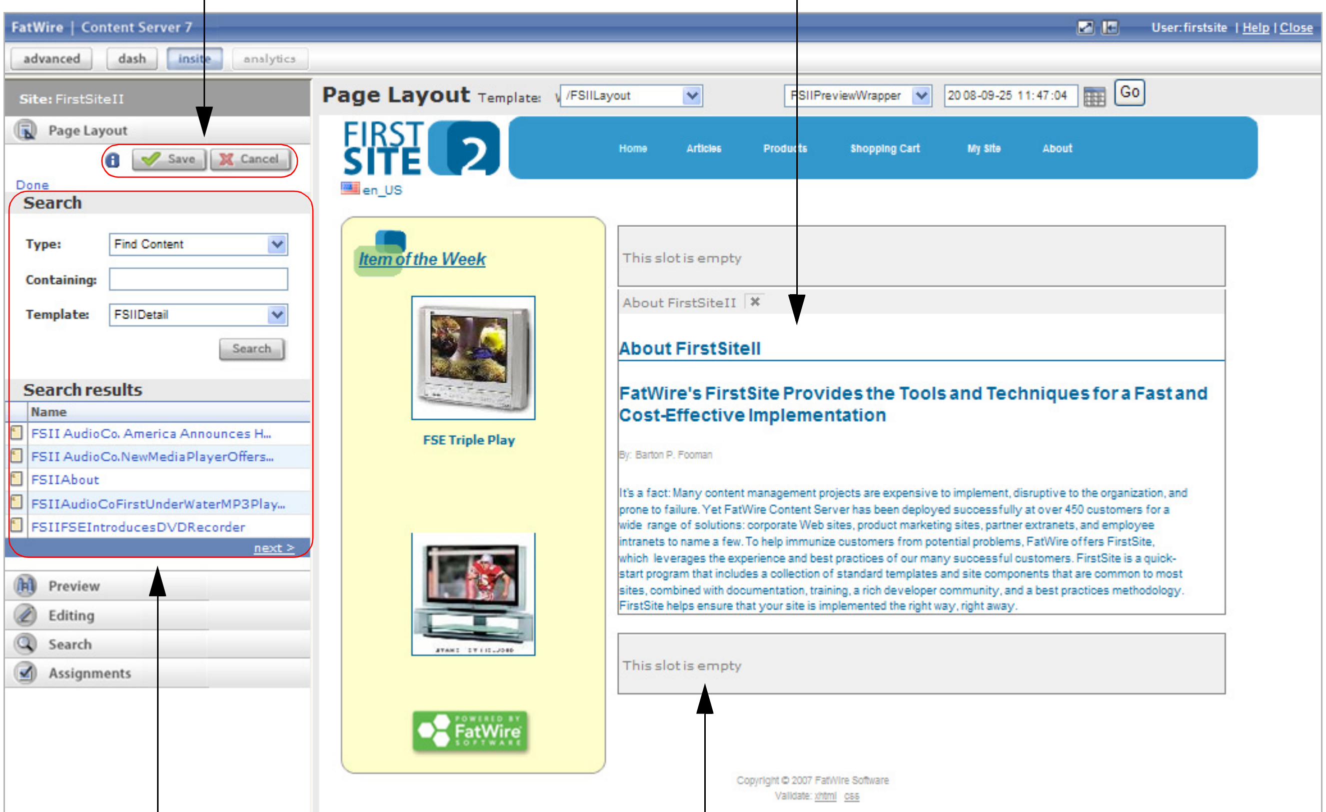
If the asset you want to work with is a page (or is assigned to a page), you can work with content directly on the page using the “Page Layout” mode, provided the page has been set up to support slots.

> **Note**
>
> Consult your site designers to find out which pages on your site support slots.

In “Page Layout” mode, each slot on the page accepts one piece of content – an asset. You add, remove, replace, and position content on the page by dragging and dropping assets into slots. Below is an example view of the InSite interface showing the FirstSite II home page in “Page Layout” mode:

Click **Save** to commit your changes to the database, or **Cancel** to discard them.

This slot is occupied by an asset. You can remove the asset from the slot, or replace it with another asset.



Use the InSite Search pane to **find and select assets** to drop into slots.

This slot is empty. You can drop an asset into it.

This section contains the following procedures:

- Adding or Replacing Content on a Page
- Removing Content from a Page
- Positioning Content on a Page

Adding or Replacing Content on a Page

This section shows you how to use the InSite interface to add or replace content on a page.

To add or replace content on a page using the InSite interface

1. Make sure the page you want to work with supports slots. Consult your site designers if you have any questions.
2. Preview the desired page, as described in "Previewing Assets," on page 128.
3. In the InSite pane, click **Page Layout**.

   The InSite interface switches to the "Page Layout" mode.

   - If the page supports slots, you will see occupied and/or empty slots, similar to the ones shown in the figure on page 134.
   - If you do not see slots on the page, stop here. The page does not support slots.

   If you have any questions, consult your developers.
4. Find the asset you want to add to or use as a replacement on the page. Do the following in the InSite pane:

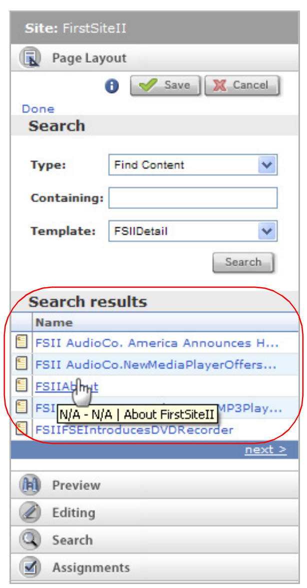
   a. In the "Type" drop-down list, select the type of asset you want to find.

   b. In the **Containing** field, enter search criteria describing the asset.

   c. In the "Template" drop-down list, select a template. Only assets to which the selected template is assigned will be returned.

   d. Click **Search**.

   The results of your search appear in the "Search Results" area of the pane:



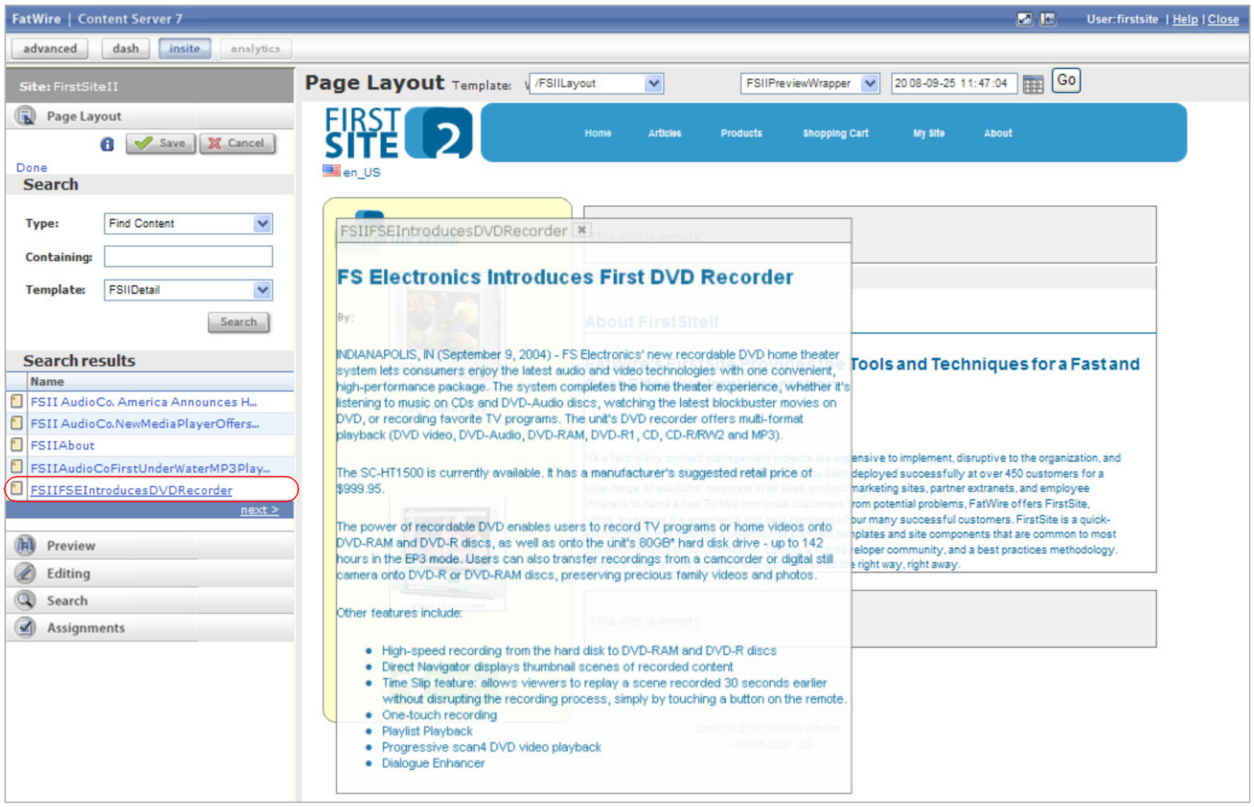
   e. In the list of search results, navigate to the desired asset:

   The list shows five assets at a time, sorted alphabetically. Hold your cursor over the asset's name to view the tool tip. It shows the asset's start and end dates and description (N/A displays when no date is assigned).

   - Click **Next** to view the next page of results.

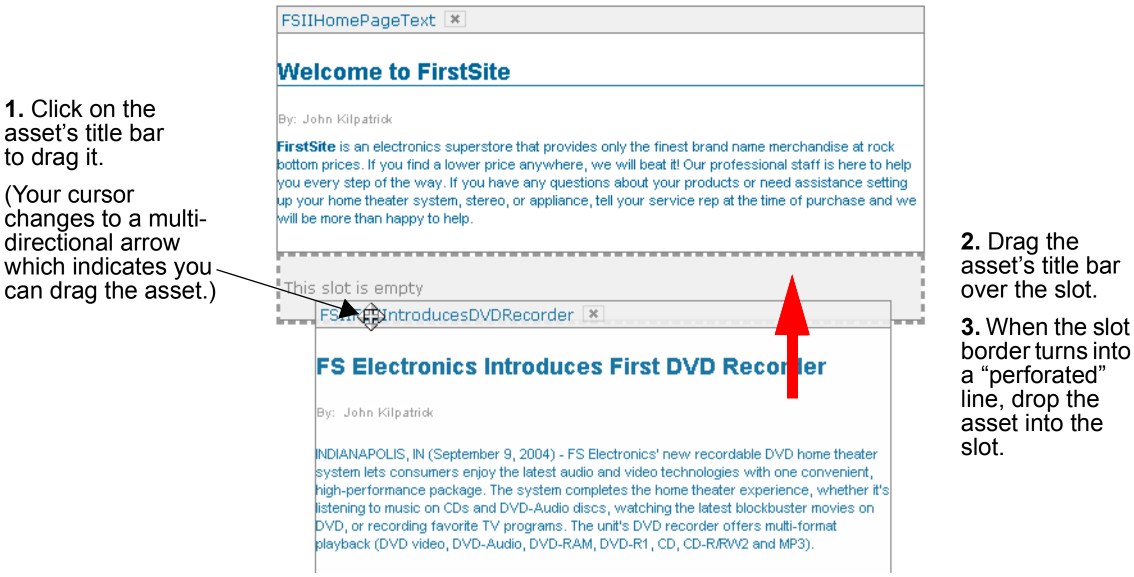
- Click **Prev** to view the previous page of results.

5. In the list of search results, select the asset you want to add to the page.

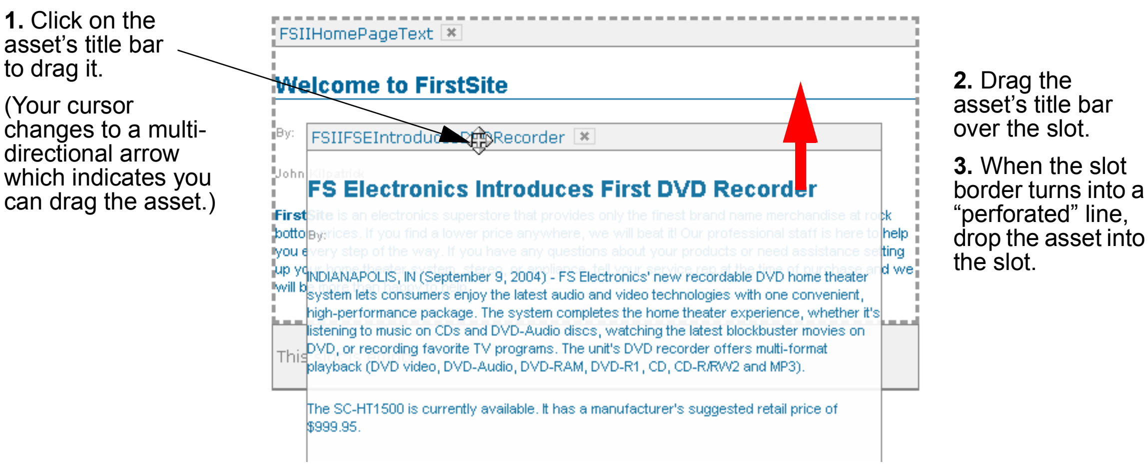


The asset is displayed in its rendered form as a floating object that you can drag and drop into a slot on the page.

6. Drag and drop the asset into the slot of your choice. Do one of the following:
   - If adding content to the page, drag the asset by its title bar into an empty slot.



   - If replacing content on the page, drag the asset by its title bar into the slot containing the content you want to replace.



When the slot is ready to accept the asset, the slot's border changes from a solid line to a "perforated" line. When that happens, drop the asset into the slot.

Note

If you are replacing content on a page, the asset currently occupying the slot is automatically removed from the slot when you drop in the new asset.

7. In the InSite pane, click **Save** to commit your changes to the CS database.

   (If you click **Cancel**, your changes will be discarded and the page redisplayed in its unmodified state.)

   Content Server refreshes the page, showing your changes.

Removing Content from a Page

This section shows you how to remove content from a page using the InSite interface.

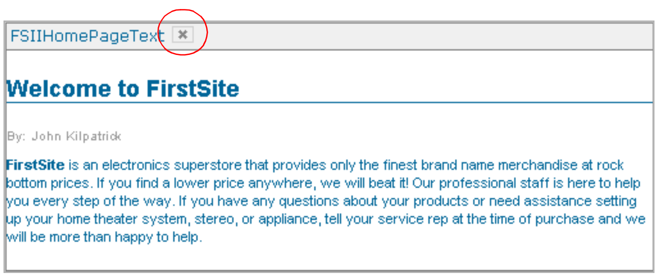
To remove content from a page using the InSite interface

1. Make sure the page you want to work with supports slots. Consult your site designers if you have any questions.
2. Preview the desired page, as described in "Previewing Assets," on page 128.
3. In the InSite pane, click **Page Layout**.

   The InSite interface switches to the "Page Layout" mode.

   - If the page supports slots, you will see occupied and/or empty slots, similar to the ones shown in the figure on page 134.
   - If you do not see slots on the page, stop here. The page does not support slots.

   If you have any questions, consult your developers.
4. On the page, locate the asset you want to remove and click the **Delete Slot Content** (**X**) button in the asset's title bar.

   Content Server removes the asset from the slot.
5. In the InSite pane, click **Save** to commit your changes to the CS database.

   If you click **Cancel**, your changes will be discarded and the page redisplayed in its unmodified state.
6. (Optional) If you would like to populate the empty slot with another asset, go to step 4 of "Adding or Replacing Content on a Page," on page 135.

Positioning Content on a Page

This section shows you how to position content on a page by moving an asset from one slot to another.

To position content on a page using the InSite interface

1. Make sure the page you want to work with supports slots. Consult your site designers if you have any questions.
2. Preview the desired page, as described in "Previewing Assets," on page 128.
3. In the InSite pane, click **Page Layout**.

   The InSite interface switches to the "Page Layout" mode.

   - If the page supports slots, you will see occupied and/or empty slots, similar to the ones shown in the figure on page 134.

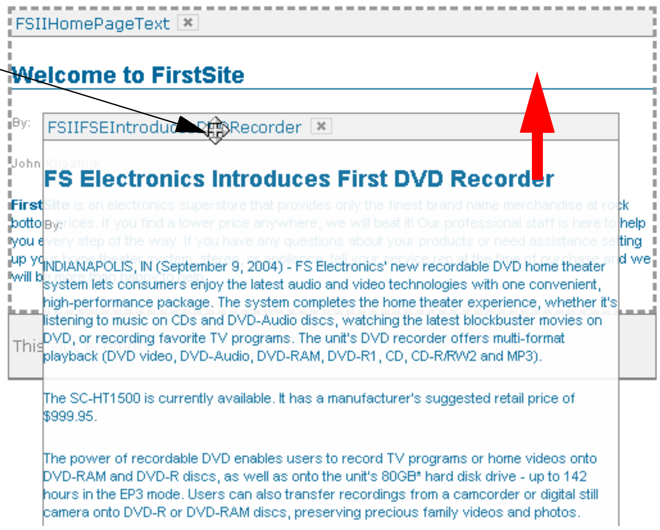
- If you do not see slots on the page, stop here. The page does not support slots.

If you have any questions, consult your developers.

4. On the page, locate the asset you want to move to another slot, and choose the destination slot to which you will move the asset. The destination can be an empty slot or a slot already occupied by another asset.
5. Drag and drop the asset into the desired slot.

1. Click on the asset's title bar to drag it.

(Your cursor changes to a multi-directional arrow, indicating you can drag the asset.)



2. Drag the asset's title bar over the slot.

3. When the slot border turns into a "perforated" line, drop the asset into the slot.

When the destination slot is ready to accept the asset, the slot's border changes from a solid line to a "perforated" line. When that happens, drop the asset into the slot.

Note

If you are moving an asset to a slot that is already occupied by another asset, the asset you are moving automatically replaces the asset currently occupying the slot.

6. In the InSite pane, click **Save** to commit your changes to the CS database.

If you click **Cancel**, your changes will be discarded and the page redisplayed in its unmodified state.

Content Server refreshes the page, showing your changes.

Searching for Assets Using the InSite Interface

If you wish to find an asset to edit or preview, you can do so within the InSite interface.

To search for assets from within the InSite interface

1. In the InSite pane, click **Search** to expand the **Search** section.

   The InSite interface switches to the "Search" mode.

2. Search for an asset.

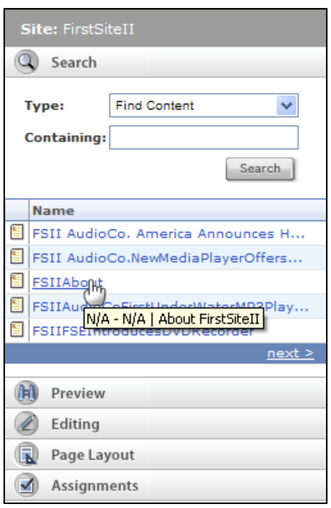
   Do the following:

   a. From the "Type" drop-down list, select the type of asset you want to find.

   b. (Optional) In the "Containing" field, enter your search criteria. Leave this field blank to return all assets of the selected type in your search results.

   c. Click **Search**.

   The results of your search appear underneath the fields.



3. In the list of search results, navigate to the desired asset.

   The list shows five assets at a time, sorted alphabetically.

   Hold your cursor over the asset's name to view a tooltip. It shows the asset's start and end dates for Site Preview and description. For more information on start/end dates, see "Assigning Start and End Dates," on page 151.

   - Click **Next** to view the next page of results.
   - Click **Prev** to view the previous page of results.

4. Click the desired asset.

   The InSite interface displays the asset in "Preview" mode. You can now perform the tasks described earlier in this section:

   - Editing Assets in the InSite Interface
   - Managing Page Content Using the InSite Interface
   - Finishing Your Workflow Assignments Using the InSite Interface
   - Obtaining the InSite URL for an Asset

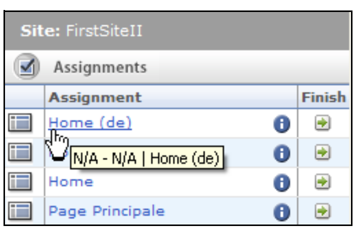
Finishing Your Workflow Assignments Using the InSite Interface

If the asset you are working on in the InSite interface is assigned to a workflow and you hold an assignment for the asset, you can finish your assignment right in the InSite interface. (For more information on workflow, see Chapter 12, "Workflow.")

To finish a workflow assignment using the InSite interface

1. In the InSite pane, click **Assignments** to expand the **Assignments** section.

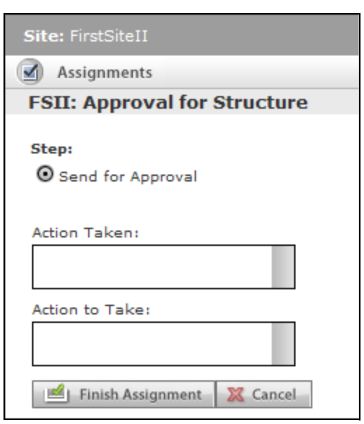
   The **Assignments** section displays a list of your current workflow assignments.



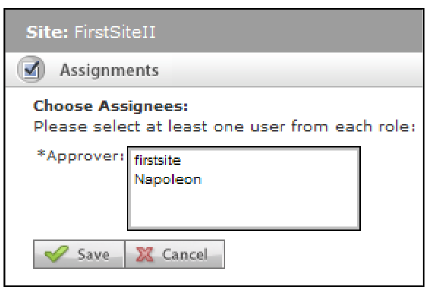
2. If you have completed the necessary work on the assigned asset, follow the steps below.

   a. Click the asset's **Finish Assignment** (green check mark) icon.

   b. The InSite pane displays the "Finish My Assignment" form. The top of the form indicates the workflow process to which the asset is assigned.



3. (Optional) If you have not yet completed the necessary work on the assigned asset, follow the steps below.
    a. Select the asset to open it in the InSite interface.
    b. Complete the necessary work on the asset by following the steps in "Editing Assets in the InSite Interface," on page 131 and "Managing Page Content Using the InSite Interface," on page 134, whichever is applicable.
    c. Click **Finish Assignment**.
4. In the form, do the following:
    a. (Optional) If the form lists more than one step leading to the next workflow state, select the next workflow step to take.
    b. (Optional) In the **Action Taken** field, enter a short description of the work you completed on the asset.
    c. (Optional) In the **Action to Take** field, enter a short suggestion for the next person who will work with the asset.
    d. Click **Finish Assignment**.
5. (Optional) If the administrator has set up the workflow process in a way that requires you to choose assignees for the next step when you finish your assignment, Content Server prompts you to select assignees for the next workflow step, as follows:



    In such case, do one of the following, select at least one user for each displayed role, then click **Save**.

What happens after you complete your assignment depends on the way the administrator set up the next workflow step. There are five possible options:

- **Retain "From" State Assignees** — you keep the assignment as the asset moves to the next state; this allows you to continue working on the asset in that state. You probably know why it is appropriate for you to keep the assignment, but if you don't, ask your administrator.
- **No Assignments —** as the asset moves to the next state, it remains in the workflow so that function privileges defined for the workflow process are enforced. However, the asset is assigned to no one and participant roles alone (through their assigned function privileges) determine who can work on the asset, and how.
- **Assign To Everyone —** the asset is assigned to all users holding roles participating in the current workflow process.
- **Assign From a List of Participants** — When you (or another user with the appropriate privileges) assign an asset to a workflow, you have the option to decide which participants in each role get the assignment when the asset enters a workflow

state requiring those roles. This is the default mechanism for moving an asset through a workflow.

- **Choose Assignees When Step is Taken** — this option is similar to the “Assign From a List of Participants” option described above, but instead of predetermining at the beginning of the workflow who will get the assignment during which workflow state(s), you choose assignees for the next workflow state in real-time each time you take a step. In such case, when you use the **Finish My Assignment** function to take the next step, Content Server prompts you to choose assignees for the asset for the next workflow state by showing a form like the one in step 5

Obtaining the InSite URL for an Asset

If you would like a colleague to view or work on a particular asset using the InSite interface, you can give them a special URL that allows them to open the asset directly in the InSite interface. Such URL is called an InSite URL and can be obtained as follows:

To obtain an InSite URL for an asset

1. Preview the asset, as described in "Previewing Assets," on page 128.
2. In the InSite bar, click **Get Link**.

   Content Server displays a pop-up message confirming the URL has been copied to the clipboard.

3. Paste the URL into the application of your choice (for example, a new e-mail message to your colleague).

> **Note**
>
> The recipient of the URL must hold a role that permits them to work with the asset and the InSite interface.

Chapter 7

Using Start and End Dates

While you are planning upcoming changes to a web site, you can assign start and end dates to an asset. Once start and dates are assigned, you can preview how the asset's web page will look at different times in the future. The feature you use to generate future versions of the web site is known as "Site Preview."

Once an asset is published, the asset displays on the production web site only during the specified date range.

You can search by start and end dates to locate it in the database.

This chapter contains the following sections:

- About Start and End Dates
- Site Preview
- Approval for Publishing
- Advanced Search

About Start and End Dates

Start and end dates are optional field values you can assign to assets. This date range indicates when assets will appear on a web site, should they be published. Fill in these dates on the **Metadata** tab of the "Edit" pane.

Start and end dates affect the function of Site Preview, as discussed in this chapter.

Start and end dates also appear in Advanced Search options, giving you the ability to search for assets based on the date range in which they will appear on the web site.

Site Preview

Site Preview is a tool for visualizing your web site as you strategize upcoming content changes. With Site Preview, you can preview an asset's web page as it will appear at any selected moment in the future. By generating possible versions of a web page, you can more easily decide what to publish and when.

Content Server uses the assigned start and end dates to determine whether to display the asset in the Preview window. An asset is displayed only when the selected preview date falls within the asset's start/end date range.

Instructions on previewing a site as it will appear on future dates and the impact of start and end dates on Site Preview are given in the Site Preview chapter. See "Previewing Future Sites," on page 149.

Note

For Site Preview to work properly, developers must include the `asset:filterassetsbydate` tag in the template of the page which displays the asset. See your site administrator for further information about the tag.

Approval for Publishing

Before an asset is published to a web site, you must approve the asset and all of its dependents for publishing. This process ensures that all the assets published at the same time are up to date prior to publishing.

The start date that you set does not necessarily have to be the date on which the item gets published. However, the asset will not display on the web site until its start date. Content Server warns you if you try to approve an asset for publishing at a date prior to the start date, as a fail-safe mechanism. This warning does not interfere with the publishing process. This is true for all the dependent assets that you are approving as well.

Content Server also warns you if you try to approve an asset for publishing after the end date. This warning does not interfere with the publishing process. If you publish an asset after its end date, the asset will be published to its destination; however, the asset will not appear on the site (the asset has expired).

Note

For assets to be viewable on the web site only during the defined start/end date range, developers must include the `asset:filterassetsbydate` tag in the template of the page where the asset displays. See your site administrator for further information about the tag.

For more information on Approving Assets, see “Approval for Publishing,” on page 207.

Advanced Search

You can use the Advanced Search function to search for assets by their start and end dates. For more information on Advanced Search see “Advanced Search Options,” on page 106.

Chapter 8

Previewing Future Sites

Web sites change from moment to moment, day to day. With the Site Preview feature, you can view site assets as they will be displayed on a site at any particular moment in the future.

Start and end dates are a key part of Site Preview, which is an enhanced function of the regular preview feature. You can preview how a page will appear without setting start and end dates (the regular preview function), but by assigning a start and end date range to an asset, you gain the ability to visualize upcoming changes to a web site. Once you assign a start date and/or an end date to an asset, you can see how the page will change over time by selecting dates from the date picker on the preview screen in the InSite interface.

This chapter contains the following sections:

About Site Preview

Site Preview is a tool for visualizing your web site as you strategize upcoming content changes. With Site Preview, you can preview an asset's web page as it will appear at any selected moment in the future. By generating possible versions of a web page, you can more easily decide what to publish and when.

Perhaps you work with more than one item at a time, deciding what banners to display when, what articles, what graphics, and so on — some items displaying for a week, others for a month, some for just one day. With Site Preview, you can pinpoint any particular moment in the future and see what all the changes you and other content contributors are making will look like on the web site at that time.

Note

In order to preview a page as it will appear at future dates:

- Start and end dates must be assigned in the metadata field as explained in "Assigning Start and End Dates," on page 151.
- The template for the page in which the asset appears must contain the `asset:filterassetsbydate` tag. See your site administrator for further information.

Impact of start and end dates on Site Preview

You will need to consider the following factors when assigning start and end dates.

1. The start and end date range are the times you expect the asset to be displayed on the web site.

   Once you set a start/end date range, you can use Site Preview to compare how the page on which that asset appears might look on dates before, during, and after the date range.

   When you first preview an asset, you see its web page as it would appear on the asset's start date. (If no start date is assigned, the current date is used for the preview.)

   Choose a future date from the date picker in the upper right corner of the preview screen, and you can view how that page would appear at the selected time. When you select a date that falls during the asset's start/end date range, the preview shows how the asset's web page will look during the period the asset is visible on the web site. Conversely, if you choose a date that falls outside that date range, you see the asset's web page as it might appear before the item is published or after the item is no longer visible on the page.

   Note that the publication date of the asset does not affect when and how long the asset displays on the web site; this is controlled by the start/end dates.

2. Neither the start date nor end date is a required field:

   - An asset without both start and end dates is always displayed when previewed, regardless of the preview date (when an asset is not time-sensitive, its preview is a regular preview).
   - However, an asset with explicitly set start and/or end dates is displayed conditionally; that is:

- If the asset has both a start and end date, it is displayed only within the specified date range.
- If the asset has only a start date, the asset is displayed on all dates including and after the start date. (It never expires.)
- If the asset has only an end date, the asset is displayed on all dates up to and including the end date.

Assigning Start and End Dates

Start and end dates are optional fields you can assign to assets. This date range indicates when assets will be displayed in the preview window.

Complete information on start and end dates can be found in "Using Start and End Dates," on page 145.

To assign a date range to an asset

1. Log in to the site you want to work with.
2. Find the asset to which you are assigning a start and/or end date. Do one of the following:
   - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
   - If you previously added the asset to a tag, select the tag that contains the item in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)
   - If you are modifying an asset that has previously been assigned start/end dates, you can search by the previously assigned dates using the Advanced Search function. For more information on Advanced Search see "Advanced Search Options," on page 106.

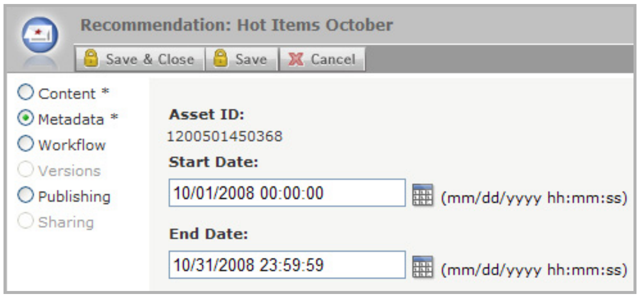
   For more information on finding assets, see "Finding Assets," on page 102.
3. Edit the asset.

   Navigate to the desired asset and click the **Edit** (pencil) icon to the left of the asset's name.

   The asset's Edit screen opens.
4. Select the asset's **Metadata** radio button.

5. Set the item's start date and/or end date and time (optional).

   In the "Start Date" and/or "End Date" text box, select the date and time from the date picker.



> **Note**
>
> Your administrator may have set default "Start Dates" and "End Dates" for this asset type. You can change the settings if you wish.

6. Choose **Save and Close** to update the asset.
7. To preview the asset's page at a future date, go to Previewing a Site as It Will Appear at a Future Time.

Previewing a Site as It Will Appear at a Future Time

When assets have been assigned start and end dates, you can preview site pages as they will appear at future times of your choice.

> **Note**
>
> In order to preview at future dates:
>
> - Start and end dates must be assigned in the metadata field as explained in "Assigning Start and End Dates," on page 151.
> - The template for the page in which the asset appears must contain the `asset:filterassetsbydate` tag. See your site administrator for further information.

To preview a site as it will appear at a future time

1. Log in to the site you want to work with.
2. Find an asset to which you have assigned a start and/or end date:

   Do one of the following:

   - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.

- If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)
- To search for assets by their start and end dates, use the Advanced Search function. For more information on Advanced Search see "Advanced Search Options," on page 106.

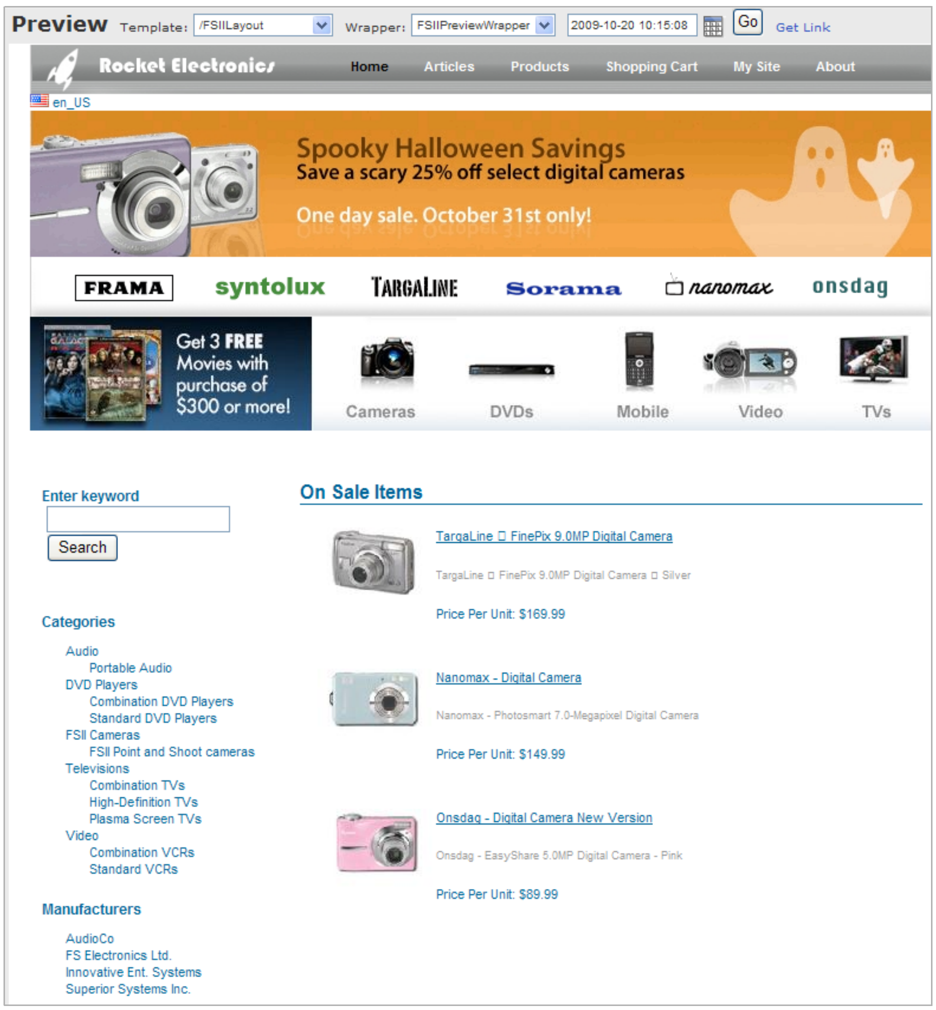
  For more information on finding assets, see "Finding Assets," on page 102.

3. Preview the asset.

   Navigate to the desired asset and click the **Preview** (binoculars) icon to the left of the asset's name.

   The "Preview" window displays the page as it appears on the asset's start date.

   For example, if you preview an asset that appears on the FirstSite (English language) home page and starts on a date in October 2009, the following screen displays:



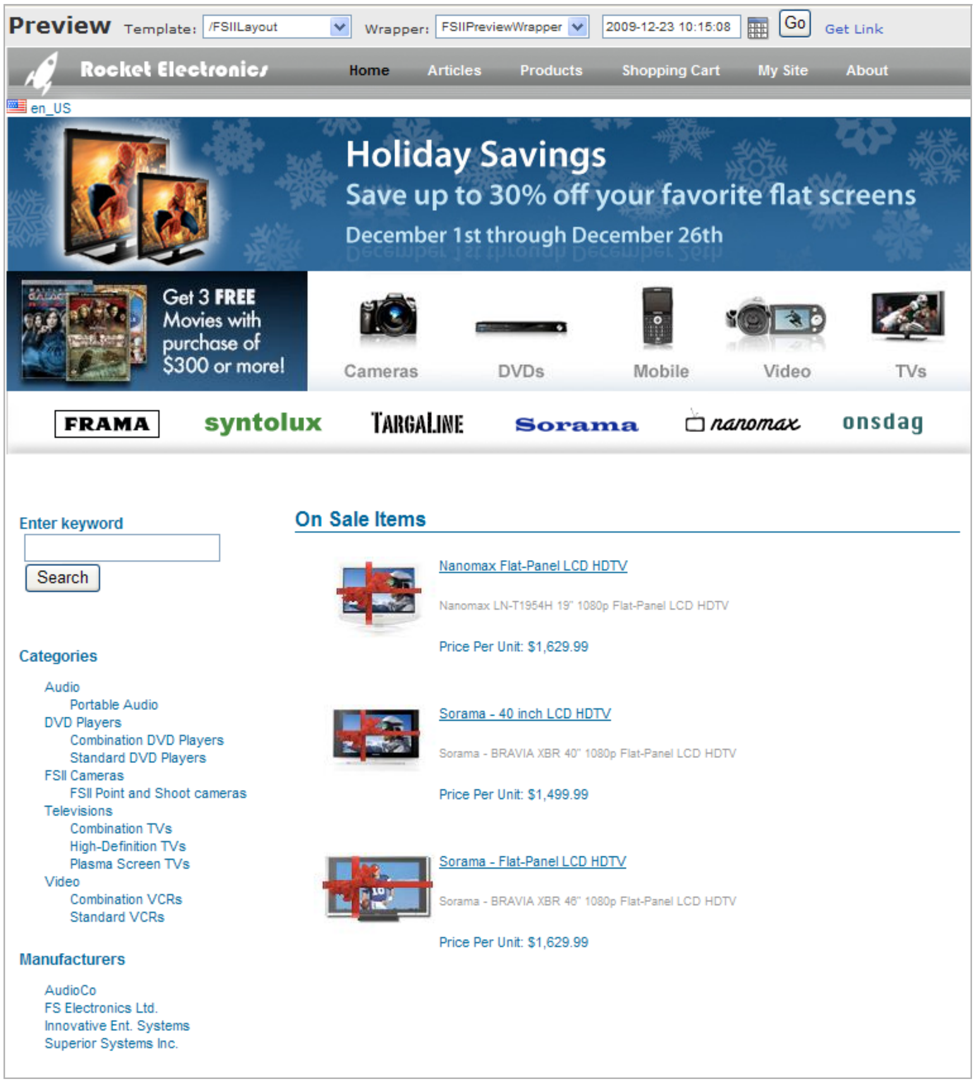
4. View the asset's page as it will appear on a future date.

   Use the date picker in the "Preview" window toolbar to choose the date and time.

5. Select **Go** to refresh the "Preview" window and display the page as it will appear on the chosen date.

   The "Preview" window displays the page as it would appear on the selected date.

   For example, if you preview the FirstSite (English language) home page for a date in December 2009, the following screen is displayed:



Chapter 9

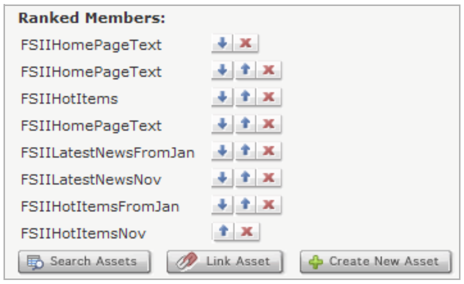
Advanced Content Management Features

Content Server offers advanced asset management features such as link embedding, placing and unplacing pages, sharing assets across sites, associating assets with one another, and deciding which assets to show to which visitors by rating the assets for segments. This chapter shows you how to use those features in the Dash interface.

This chapter contains the following sections:

Working with Asset Associations

Some asset create and edit forms include fields where you link another asset to the one in which you are working. These types of fields are called “associations.”



An association field from the FirstSite sample site. Here, five image files are associated with an asset.

When you create asset associations, you are indicating assets that can work together in the web site’s design or function. Associations makes it easier for content editors to locate the appropriate assets to assemble when developing the web site.

Examples of assets which might be associated together are:

- **Assets associated by content**: For example, suppose an “article” asset creation form has an “image” association field. In this case, you might associate an article about technology with a picture of a computer. By associating the image asset with the article asset, you are indicating which image appropriately illustrates the article text.
- **Assets associated by design**: For example, an “image” asset creation form might have a “thumbnail size” association field. The regular image might be used in a product detail page, while a thumbnail size image could be used on a page displaying small preview images of products within a category. By associating the differently sized versions of the image, you are associating similar assets that will be used in different page layouts.
- **Assets associated by functionality**: For example, by associating a “media” asset with a “media player” asset, the site designers can design media pages that include a link to the appropriate media player download site.

In all of these associations, content creators indicate assets that are appropriately used together. *How* the associated assets will actually be used on the web site is up to the site developers. For example, for a “product” asset associated with a “recommendation” asset, the site visitor could be presented with the product recommendation list while viewing the product, after adding the product to the shopping cart, or in a post-purchase email, depending on how developers code the site.

Note that an asset can be used in multiple associations. For example, in an online store a user guide that covers three different models of similar products can be associated with all three “product” assets, or even with several different association fields in an asset’s definition.

Named and Unnamed Associations

There are two types of associations, named and unnamed associations. They are compared in the table below.

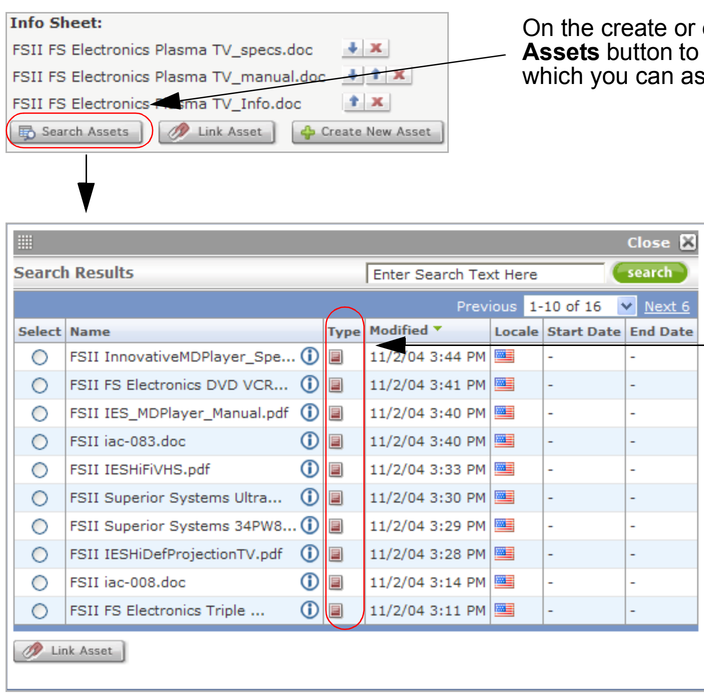
Table 1: Named and Unnamed Associations

Named Association	Unnamed Association
Can be used with any type of asset.	Is only available on “Page” type assets.
Can be set up to allow the user to select either: • A single asset (single valued) or • Several assets (multi-valued).	Always allows the selection of multiple assets (multi-valued).
When multi-valued, the allowable assets will be of a single asset type.	Allows the selection of assets of different asset types.

Named Associations

Single-valued named associations are used when the user is required to make a one-to-one association between a field and the associated asset. For example, when a site’s design dictates that an “article” asset is paired with a single “image” asset.

Multi-valued named associations are used when the user must be restricted to a single asset type. For example, such a field might be used to designate info sheets to associate with a product, where only “document” assets are the appropriate choices. Items will display in the order listed, and may be rearranged using the up and down arrows.



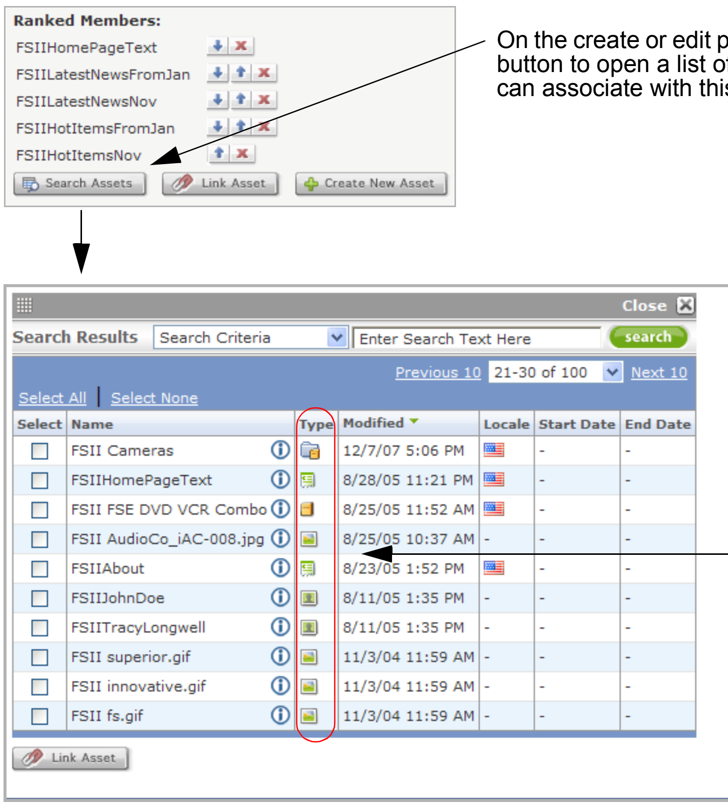
On the create or edit pane, click the **Search Assets** button to open a list of available assets which you can associate with this asset.

Because the field that you can associate these items with is a multi-valued named association, the available assets are all of a single asset type.

Unnamed Associations

Unnamed associations are generally used for designating the sets of assets used to assemble a page. For example, an ad banner, an article, an image file, and a video clip might all be associated with a “page” asset.

Items will display on the page in the order listed, and may be rearranged using the up and down arrows.



On the create or edit pane, click the **Search Assets** button to open a list of available assets which you can associate with this asset.

Because the field that you can associate these items with is an unnamed association, several different types of assets may be selected.

Associating Assets

This procedure shows you how to associate one or more assets with another asset. The procedure covers both named and unnamed associations.

To associate an asset with another asset

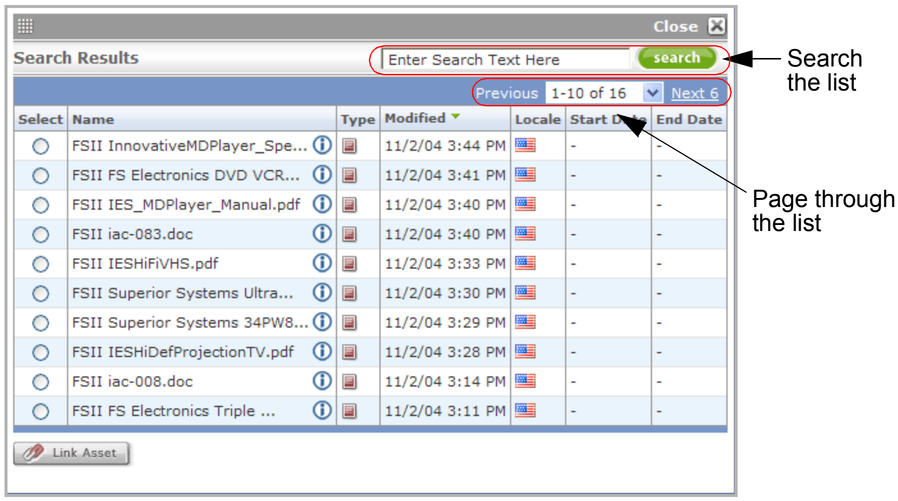
1. Log in to the site you want to work with.
2. Do one of the following:
   - Begin creating an asset (for instructions, see “Creating Assets,” on page 76).
   - Open an existing asset for editing (for instructions, see “Editing Assets,” on page 84).

3. Associate assets. On the “create” or “edit” pane, do one of the following:

- Select assets to associate from a list:

  a) In the attribute in which you are associating assets, click **Search Assets**.

  A pop-up window opens. It displays a list of all the assets which can be associated.



  b) (Optional) Search the list. Enter search criteria identifying the asset(s) and click **Search**.

  A search results list is returned.

  c) Select the radio button or check box(es) next to the asset(s) you want to associate. Click **Link Asset**.

- Link to asset(s) listed in the Search Results pane:

  a) Do one of the following:

  - In the **Search** field in the top bar of the Dash interface, enter search criteria identifying the asset(s) and click **Search**.
  - If you previously added the asset(s) to a tag, select the tag in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

  For more information on finding assets, see “Finding and Organizing Assets,” on page 101.

  The results lists opens in the Search Results pane.

  b) From the results list, select the item(s) you wish to associate with the asset. Click **Link Asset** to associate the assets.

  The selected assets are added to the association field.

4. (Optional) If you are working with an multi-valued association and have associated two or more assets, arrange the associated assets in the list as follows:

> **Note**
>
> The order in which the assets appear in the list is the order they will display on the online site.

- To move an asset up in the list, click the **up arrow** button next to the asset.
- To move an asset down in the list, click the **down arrow** button next to the asset.
- To remove an asset from the list, click the **Delete** (red **X**) button next to the asset.

5. When you are finished, click **Save & Close** in the action bar.

   Content Server displays the asset in the "Inspect" form, showing the associated assets.

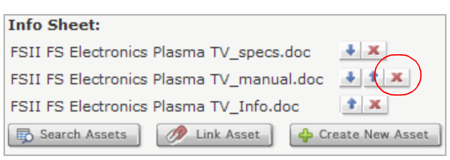
Disassociating Assets

To disassociate an asset from another asset

1. Log in to the site you want to work with.
2. Find and open the asset from which you want to disassociate one or more assets:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

      For more information on finding assets, see "Finding and Organizing Assets," on page 101.
   b. In the list of results, navigate to the desired asset and click the **Edit** (pencil) icon to the left of the asset's name.

      Content Server displays the asset in the "Edit" form.
3. In the "Edit" form, navigate to the field representing the desired association and click the **Delete** (red **X**) button next to each asset you want to disassociate.



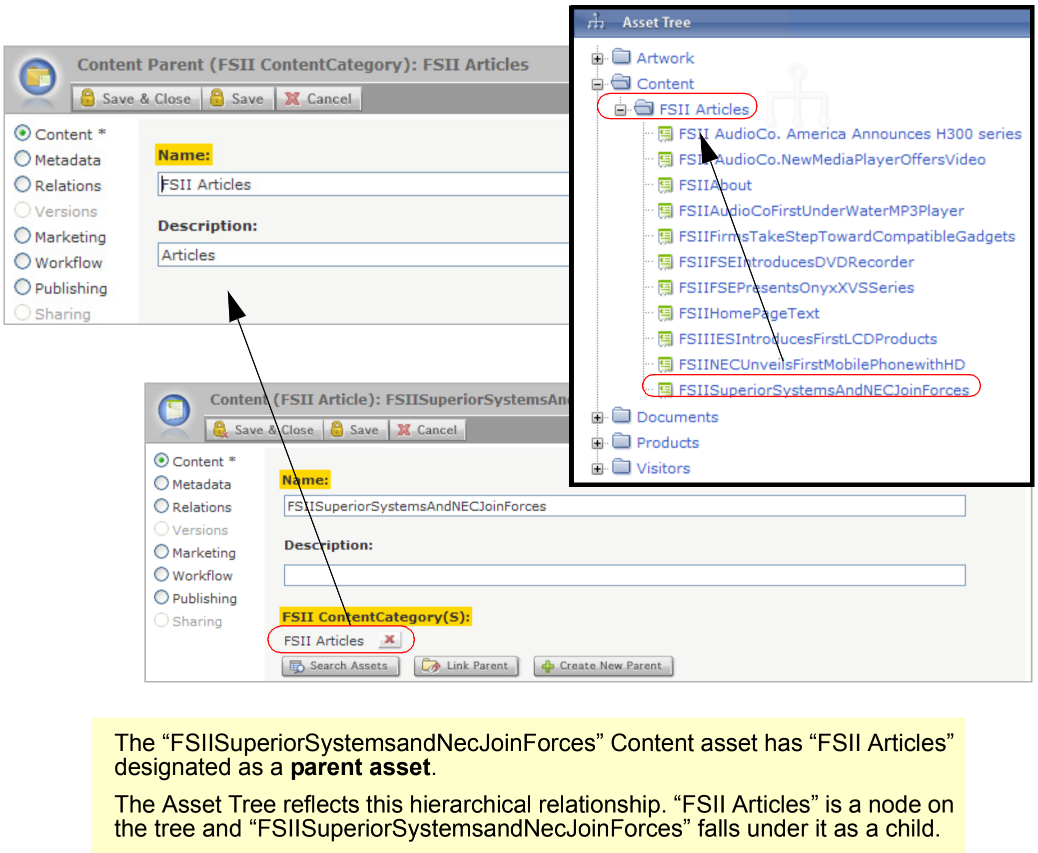
   Content Server removes the asset from the association field.
4. In the action bar, click **Save & Close**.

   Content Server displays the updated asset in the "Inspect" form.

Parent Relationships

When you designate an asset as a parent of another asset, you are creating a hierarchical relationship between the two assets. An asset that is linked to a parent is called a "child" asset.

Parent-child relationships are used to organize assets in the asset tree. Parent-child relationships are taken into account during approval for publishing so that no broken links result on the published site. More information on approval for publishing can be found in "Approval for Publishing," on page 207.



An asset can have more than one parent. When assigned multiple parents, the asset appears in multiple places in the Asset Tree, as a child of every parent node.

To designate a parent asset

1. Log in to the site you want to work with.
2. Do one of the following, as desired:
   - Begin creating an asset (for instructions, see "Creating Assets," on page 76).
   - Open an existing asset for editing (for instructions, see "Editing Assets," on page 84).

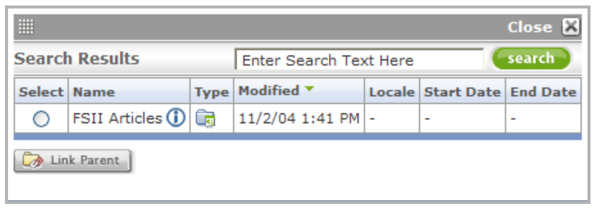
3. Designate a parent asset. On the “create” or “edit” form, do one of the following:

- Select assets to associate from a list:

  a) In the attribute in which are associating assets, click **Search Assets**.

  A pop-up window opens. It displays a list of all appropriate assets.

  b) (Optional) Search the list. Enter search criteria identifying the asset(s) and click **Search**.

  A search results list is returned.

  c) Select the radio button or check box next to each asset you want to designate as a parent asset. Click **Link Parent**.

- Link to asset(s) listed in the Search Results pane:

  a) Do one of the following:

  - In the **Search** field in the top bar, enter search criteria identifying the asset(s) and click **Search**.
  - If you previously added the asset(s) to a tag, select the tag in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

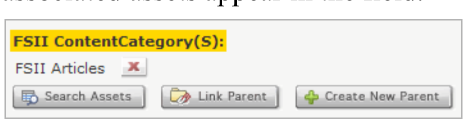
  For more information on finding assets, see “Finding and Organizing Assets,” on page 101.

  The results lists opens in the Search Results pane.

  b) From the results list, select the item(s) you wish to link to the recommendation list. Click **Link Parent** to make the current asset the parent of the asset(s) you select.

Content Server associates the select assets with the parent asset. The names of the associated assets appear in the field.



Placing and Unplacing Pages

If you hold the appropriate role, you can use the **Site Plan** tree to place pages on the online site and unplace pages that currently appear on the site. The **Site Plan** tree provides you with the interface to select and arrange "Page" assets for inclusion in the site hierarchy. The changes you make through the tree will be applied to the online site during the next publishing session. For more information on "Page" assets, see the *Content Server Advanced Interface User's Guide* or consult your developers.

Note

The **Site Plan** tree requires you to place pages in an ordered hierarchy. Before you perform the procedures in this section, consult your developers to familiarize yourself with the structure of your online site so that you know where each page belongs in the site hierarchy.

This section covers the following procedures:

- Placing a Page
- Unplacing a Page

Placing a Page

This section shows you how to place a "Page" asset using the **Site Plan** tree. The tree supports two methods for placing pages:

- Directly under a parent page as the parent's highest-ordered child.
- At the same level in the hierarchy as another page. The selected page is placed next-in-order after the other page.

After you place a page, you must approve and publish the page in order to have it displayed on the online site.

To place a page on the online site

1. Log in to the site you want to work with.
2. In the navigation pane, click the **Site Plan** tab.

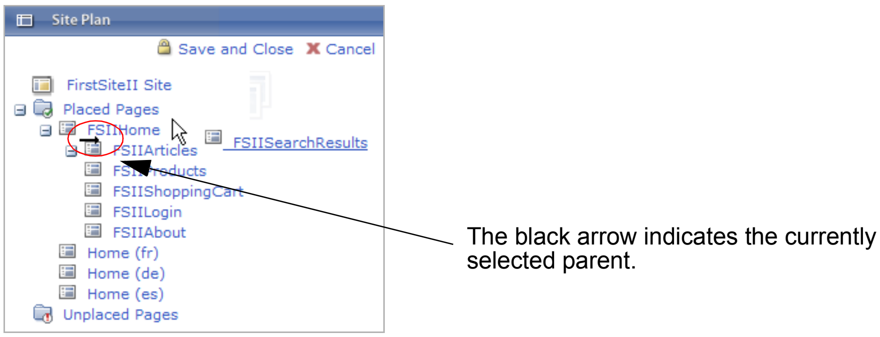
   The pane displays the **Site Plan** tree.
3. Click **Edit** in the top right corner of the tree.

   The site hierarchy expands.
4. Find the page you want to place and determine its target position in the hierarchy:
   a. Find the desired page:
      - If you are placing an already placed page, navigate the **Placed Pages** hierarchy to find the desired page.
      - If you are placing an unplaced page, navigate the **Unplaced Pages** hierarchy to find the desired page.
   b. Navigate the **Placed Pages** hierarchy to determine the page's target position in the site hierarchy.

5. Place the page by dragging it to its target position in the hierarchy. Do one of the following:

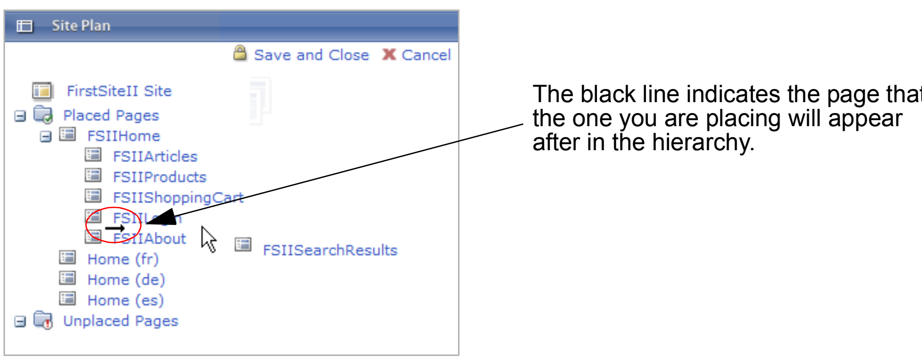
   - To place the page as the highest-ordered child of a parent page, drag the selected page over the **name** of the parent.

     For example, to place **FSIISearchResults** as the highest-ordered child of **FSIIHome**, drag **FSIISearchResults** over **FSIIHome** as shown below:

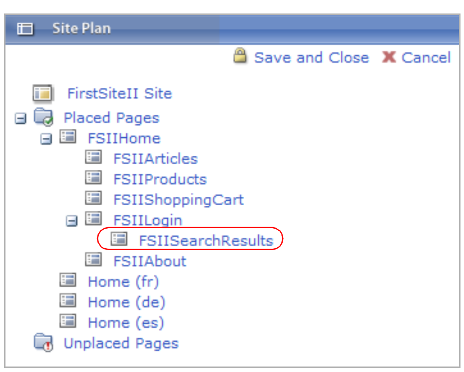


   - To place the page at the same level as another page, drag the selected page over the **icon** of the other page. The selected page will be placed in the list as next-in-order after the other page.

     For example, to place **FSIISearchResults** at the same level as (and after) **FSIILogin**, drag **FSIISearchResults** over the **FSIILogin** icon as shown below:



     When you release the page, it appears in the position you have chosen. For example:



6. Click **Save and Close** to save your changes to the CS database.

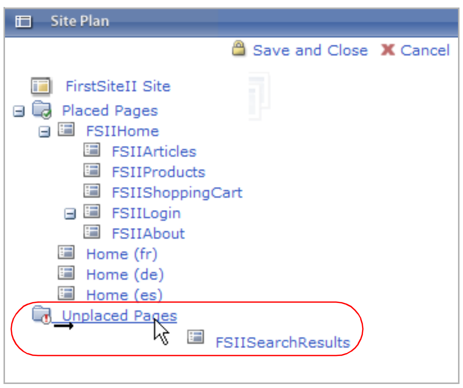
Unplacing a Page

This section shows you how to unplace a “Page” asset — that is, mark it for removal from the online site. After you unplace the page, it will be removed from the online site during the next publishing session.

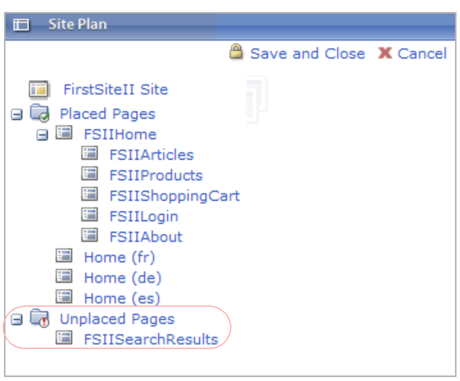
To unplace a page on the online site

1. Log in to the site you want to work with.
2. In the navigation pane, click the **Site Plan** tab.

   The pane displays the **Site Plan** tree.
3. Click **Edit** in the top right corner of the tree. The site hierarchy expands.
4. Navigate the **Placed Pages** hierarchy to find the page you want to unplace.
5. Unplace the page by dragging it over the **Unplaced Pages** node. For example, to unplace **FSIISearchResults**, drag it over **Unplaced Pages** as shown below:

   When you release the page, it appears under the **Unplaced Pages** node.

6. Click **Save and Close** to save your changes to the CS database.
7. The online site will be updated with your changes during the next publishing session.

Sharing Assets with Other Sites

If you are working with an asset that you want to use in more than one site, you can share it so that you do not have to create it more than once and maintain it across multiple sites.

Before you share an asset, consider the following:

- You must have the right permissions to share an asset.
- You can share an asset only to sites that you have access to. If you have access to only one site, the **Sharing** form section is not available to you.
- You cannot share "Page" assets.
- Share an asset only if the content it contains does not have to be unique to the target site. For example, you can share an asset containing your company's logo, because the same image can be probably be used on all of the company's sites.

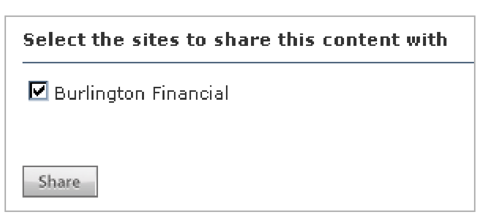
  If the nature of the content dictates the need for a separate, unique version for each site, do not share the asset – instead, create a new asset for each site that requires a unique version of the content.
- Because of the nature of asset sharing, if a shared asset is deleted, it automatically disappears from all of the sites it was shared to.
- If the asset is in a workflow, you and others can change its workflow status only when you are working in the asset's original site.
- It is good practice to share the asset only when you are ready to publish it; that is, wait to share the asset until it has been approved.
- If you want to share a localized asset to another site, the asset's locale must be enabled on the target site.

To share an asset to another site

1. Find and open the asset you want to share to another site:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you know the asset is assigned to a tag, select the tag in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the list of results, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
2. Click **Sharing** in the section selector.
3. In the **Sharing** section, select the site (or sites) to which you want to share the asset.



4. Click **Share**. A message confirms that the asset is now available in the selected site(s).

Rating Assets for Segments

This procedure shows you how to rate assets for segments. Rating assets for segments determines which assets are shown to the site visitors, based on information (such as age or income) the visitors provide about themselves.

> **Note**
>
> You can rate assets for segments only if Engage is installed. For a complete explanation of segments, ratings, and other Engage functionality, see the *Content Server Advanced Interface User's Guide* or consult your CS administrator.

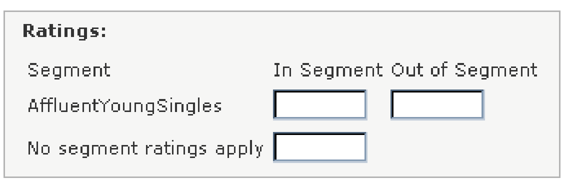
To rate an asset for one or more segments

1. Find and open the asset you want to rate:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane.

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the list of results, navigate to the desired asset and click the **Edit** (pencil) icon to the left of the asset's name.

      Content Server displays the asset in the "Edit" form.
2. Click **Marketing** in the section selector.

   The **Marketing** section lists all segments available in the current site. For example:



3. Using a range of 0 through 100 (100 is the highest value), rate this asset for the segments in the list:
   - Enter a value in a segment's **In Segment** column to rate the asset for members of this segment.
   - Enter a value in a segment's **Out of Segment** column to rate the asset for visitors who are not members of this segment.
   - Enter a value in the **No segment ratings apply** field to assign an intrinsic rating to the asset; this rating will be used when no segments are defined or the asset is assigned to a recommendation that does not recognize segments.

   To learn more about ratings and the recommendations that support them, see the *Content Server Advanced Interface User's Guide*.
4. When you are finished, click **Save & Close**. Content Server displays the asset in the "Inspect" form, showing your changes.

Working with List Mode Static Lists Recommendations

A “Recommendation” asset collects, assesses, and sorts assets, and then recommends the most appropriate of these assets to the current visitor. How does it determine which assets are the most appropriate? By consulting the list of segments that the visitor belongs to and any confidence set in the recommendation for each asset. (For information about segments and confidence, see the *Content Server Advanced Interface User’s Guide*.)

In the Dash interface, a Static Lists recommendation operates in List mode—that is, it returns a single preselected list of assets, regardless of segments, or whether segments apply at all.

This section shows you how to create and configure List mode Static Lists recommendations.

> **Note**
>
> Recommendations types other than List mode Static Lists are available in Content Server’s Advanced interface. For detailed information about these additional recommendation types, see the *Content Server Advanced Interface User’s Guide*.

Creating List Mode Static Lists Recommendations

To create a List mode Static Lists recommendation

1. Log in to the site you want to work with.
2. In the “Create New...” drop-down list at the top of the navigation pane, select **New Recommendation**.

   Content Server displays the “Create New Recommendation” form:

3. In the form, do the following:
   a. Enter a name for the asset. Note the following conventions when naming the asset:
      - The name must be between 1 and 64 alphanumeric characters.
      - The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), question mark (?), percent sign (%), less-than sign (<), and greater-than sign (>).
      - The name can contain spaces (except for names of flex attributes), but cannot start with a space.

b. (Optional) In the **Description** field, enter a short, informative description for the recommendation.

c. (Optional) If the administrator configured the asset type such that all new "Recommendation" assets are placed into workflow upon creation, you will see the following fields:

- The **Workflow Process** field, showing the pre-assigned workflow process
- The **Assignees** field, listing possible assignees for each role required by the process

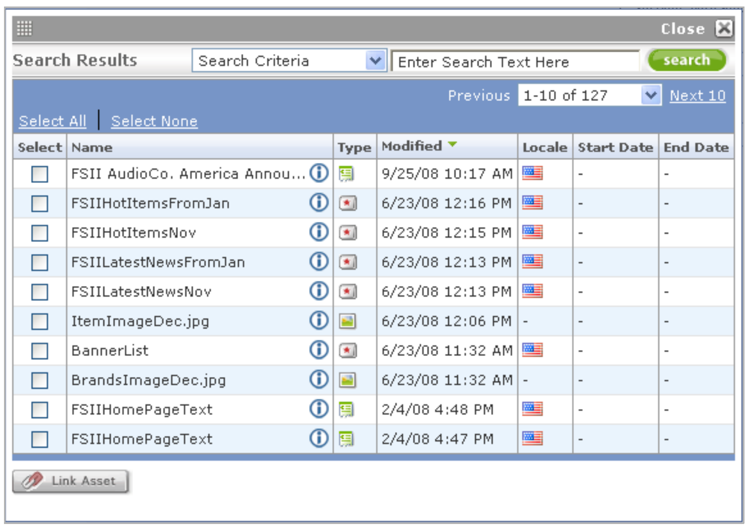
Select at least one assignee for each role to proceed with the creation of the asset. Any of these users can complete the next step in the workflow process.

For more information, see Chapter 12, "Workflow."

4. Add assets of the selected asset types to the recommendation. Do one of the following:

- Select assets from a list:

1) In the **Selected Assets** field, click **Show Assets**. A pop-up window opens displays a list of all the assets of the types selected in the previous step.



2) (Optional) Search the list by selecting a search criteria and/or entering a search term and clicking **Search**.

3) Select the check box next to each asset you want to add to the recommendation list. Click **Link Asset**.

The assets are added to the Selected Assets list.

- Link to an open list of items:

1) Do one of the following:

- In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
- If you previously added the asset to a tag, select the tag in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

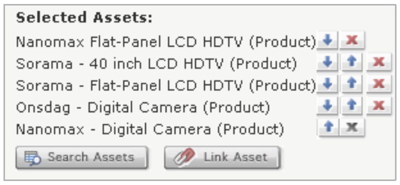
For more information on finding assets, see "Finding Assets," on page 102.

The results lists opens in the top pane.

2) From the results list, select the items you wish to link to the recommendation list. Click **Link Asset**.

   The assets are added to the Selected Assets list.

5. Arrange the assets you added in the desired order. The order in which the assets appear in the list is the order in which they will be displayed on the online site.



- To move an asset up in the list, click the **up arrow** button next to the asset.
- To move an asset down in the list, click the **down arrow** next to the asset.
- To delete the asset from the list, click the **Delete** (red **X**) button next to the asset.

6. (Optional) If you wish to apply this recommendation only to particular asset types, you can do so on the Metadata tab.
7. Save the asset by clicking **Save & Close**.

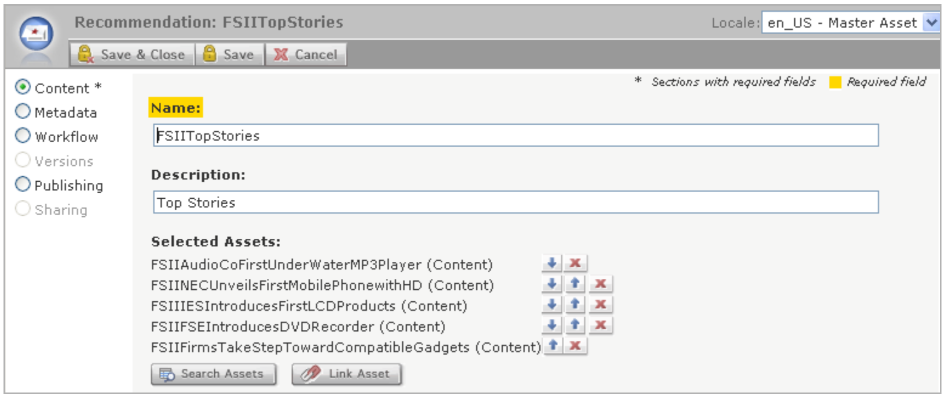
Editing List Mode Static Lists Recommendations

To edit a List Mode Static Lists recommendation

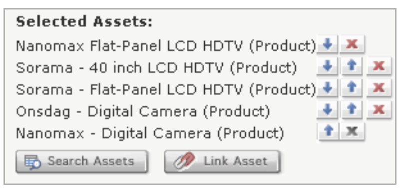
1. Log in to the site you want to work with.
2. Find and open the “Recommendation” asset you want to edit:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see “Finding Assets,” on page 102.
   b. In the list of results, navigate to the desired asset and click the **Edit** (pencil) icon to the left of the asset’s name.

Content Server displays the asset in the “Edit” form.

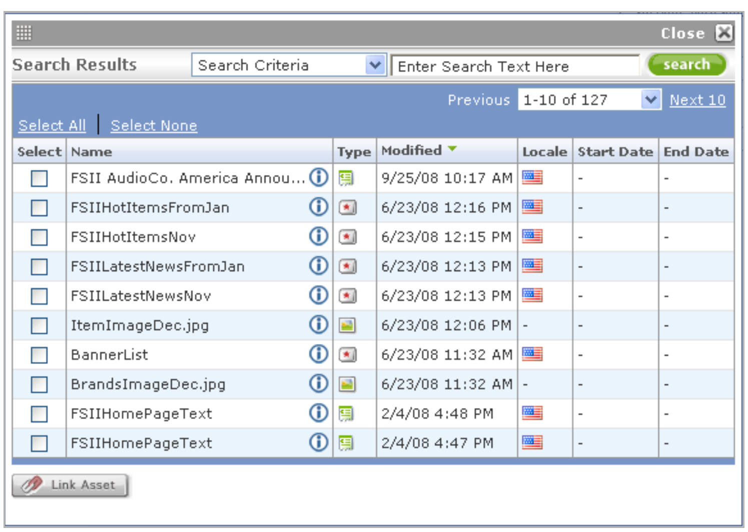


3. The order in which the assets appear in the list is the order in which they will be displayed on the online site. In the **Selected Assets** field, make your changes to the list of assets associated with this recommendation as follows:



- To remove assets from the list, click the **Delete** (red **X**) button next to each asset you want to remove.
- To change the order in which the assets appear in the list, click the up or down arrow next to each asset you want to move within the list.
- To add assets to the list, do one of the following:
  - Select assets from a list:

    a. In the **Selected Assets** field, click **Show Assets**. A pop-up window opens displays a list of all the assets of the types selected in the previous step.



- **b.** (Optional) Search the list by selecting a search criteria and/or entering a search term and clicking **Search**.
- **c.** Select the check box next to each asset you want to add to the recommendation list. Click **Link Asset**.

  The assets are added to the Selected Assets list.

- Link to an open list of items:
  - **a.** Do one of the following:
    - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
    - If you previously added the asset to a tag, select the tag in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

    For more information on finding assets, see "Finding Assets," on page 102.

    The results lists opens in the top pane.
  - **b.** From the results list, select the items you wish to link to the recommendation list. Click **Link Asset**.

    The assets are added to the Selected Assets list.

4. Save the asset by clicking **Save & Close**.

When you save the asset, Content Server displays the asset in the "Inspect" form, unless:

- You have left out one or more required fields (highlighted in yellow)
- An entry or selection you have made in is not permitted

If either of the above is true, Content Server displays an error message indicating the offending fields. Correct the errors, then click **Save & Close**.

Chapter 10

Linking Assets

When creating and updating assets, you have the option to link the assets to each other in several ways, as long as the assets are on the same site.

This chapter includes the following sections:

Overview

Some assets' create and edit forms have an FCKEditor enabled field. FCKEditor supports a wide range of formatting options, such as the option to link assets to each other using the link icons located on the FCKEditor toolbar. The table below identifies the icons on the FCKEditor toolbar that you will be working with for the following linking procedures:

Table 2: FCKEditor Icons Used to Link Assets

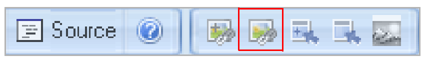
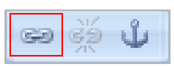
Type of Link	Icon(s)	Description	For Linking Procedures, See
Linking two assets directly	 **Add asset link**	Used to create a hyperlink to the target asset from the referring asset.	"To Create a Hypertext Link to Another Asset," on page 178
	 **Include asset**	Used to dynamically include the previewable content of one asset in another.	"To Link Two Assets by Inclusion," on page 181
Link two assets via an image asset	 1. **Include asset** 2. **Add asset link**	**1.** The **Include asset** icon is used to include an image from the "My List" node into the referring asset's FCKEditor enabled field. **2.** Once the image is included, the **Add asset link** icon is used to hyperlink the image to another asset.	"Linking via an Image from the "My List" Node," on page 187
	 1. **Pick an image to include** 2. **Add asset link**	**1.** The **Pick an image to include** icon is used to include an image from the "Image Picker," into the referring asset's FCKEditor enabled field. **2.** Once the image is included, the **Add asset link** icon is used to hyperlink the image to the target asset.	"Linking via an Image from the Image Picker," on page 191

Table 2: FCKEditor Icons Used to Link Assets

Type of Link	Icon(s)	Description	For Linking Procedures, See
Linking two assets, when the target asset has not been created yet	 **Create and link a new asset**	Used to create a target asset, directly from the referring asset's FCKEditor enabled field, and then to insert a hypertext link to that target asset in the field.	"Insert a Hyperlink to the New Target Asset," on page 196
	 **Create and include a new asset**	Used to create a target asset directly from the referring asset's FCKEditor field, and then to include the previewable content of that target asset into the field.	"Include the Target Asset's Previewable Content," on page 199
Linking assets to URLs	 **Insert/Edit Link**	Used to insert an "unmanaged" hypertext link to a **URL** into the referring asset's FCKEditor enabled field. Additional options, such as **Email**, are also available in the **Insert/ Edit Link** icon, but they are not covered in this guide. For more information about the additional options, refer to the FCKEditor's documentation at: `http://docs.fckeditor.net`	"Linking Assets to URLs," on page 203

Linking Two Assets Directly

This section contains prerequisite steps and instructions for linking two assets, as follows:

- **Creating a hypertext link to another asset**

  You may have two assets—article assets, for example—with related content that you wish to join by a hypertext link. Working in the main article, you would use the **Add asset link** icon on the FCKEditor toolbar to insert a hypertext link to the related article. When site visitors access the main article's content, they can click the inserted hypertext link to render the related article's content.

- **Linking two assets by inclusion**

  A commonly performed CM operation is to insert previewable content from one asset into another asset, but without manually copying the content. Instead, the content is inserted "by reference," so that it can be dynamically updated at the insertion point when the target asset (the source of content) is modified.

In this scenario, you would use the **Include asset** icon in the FCKEditor toolbar to insert the asset, whose previewable content is then rendered *dynamically* at the insertion point.

When using **Include asset**, you are actually inserting a link to the target asset, but rendering the link in the form of the target asset's previewable content. The link persists after the target asset is included. As a result, the content is not editable at the insertion point, but it is refreshed when the target asset (the source of content) is modified. To view refreshed content, you must save, close, and then re-open the referring asset.

The extent to which these capabilities are available to you depends on how your site designers have implemented them as part of the custom asset design. For example, the "Content" asset type that ships with the FirstSite II sample site is configured with an FCKEditor in its "Body" field. Therefore the "Body" field supports the types of links described above.

Prerequisites

Before linking assets, you must verify that they can be linked. Use this section as a checklist. (It is assumed that you know how to edit and preview assets, and create them, if necessary. Basic instructions are given in various steps.)

Participating Assets

Two assets are involved in this procedure, and both assets are on the same site:

- The referring asset (in which you will create the link to the target asset)
- The target asset (which will be rendered when the link is clicked)

Referring Asset

- The referring asset displays the FCKeditor in the field where you will place the link. If you need instructions for verifying that FCKEditor is displayed, complete the following steps:

> **Note**
>
> If you are creating a new referring asset, you can start this procedure in the asset's "New" form. However, it is best to save the asset and then open its "Edit" form (to ensure against possible loss of any existing content, as you move from step to step).

1. Open the referring asset in its "Edit" form. If you need to find the referring asset, do the following:
   a) In the top bar, go to the "Search Criteria..." menu and select the asset type of the asset you want to find.
   b) In the "Search" field located in the top bar, enter the desired search criteria (if any) and click **Search**.

c) In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

2. Go to the field in which you would like to place the link. Click in the field to make sure it displays the FCKEditor.

> **Note**
>
> By default, FCKEditor is not displayed automatically when the asset's "Edit" form opens. To display the FCKEditor click in the field. If the FCKEditor does not appear, then the field is not FCKEditor enabled and the assets cannot be linked. Contact your system administrator to have the field enabled.

- If you intend to publish the referring asset, the asset must be previewable, including the field where you will place the link. (Ensure that the referring asset can be rendered by one of the templates that is listed in the asset's "Template" field, located in the **Metadata** section of the asset's form. For instructions on previewing assets, see "Previewing Assets," on page 128.)

Target Asset

- The target asset is previewable (ensure that the target asset can be rendered by one of the templates that is listed in the asset's "Template" field, located in the **Metadata** section of the asset's form).
- (Optional) The target asset is readily available for linking (ensure that the target asset is placed in the "My List" node located in the **Tags** tab of the navigation pane).

> **Note**
>
> Placing target assets in the "My List" node is most efficient when linking large numbers of target assets to a source asset. When you are linking only one target asset to a source asset, you can conduct a search for the target asset while working in the source asset's "Edit" form. (If you were trying to link a large number of assets to a source asset, you would have to conduct a separate search for each target asset.) When you conduct a search for a target asset, the search results are rendered above the source asset's "Edit" form. For information about searching for assets, see "Searching for Assets," on page 104.

1. Find the target asset and place it in the "My List" node:
   a) In the top bar, go to the "Search Criteria..." drop-down menu, click the asset type of the asset you want to find.
   b) In the "Search" field located in the top bar, enter the desired search criteria (if any) and click **Search**.
   c) In the search results list, navigate to the desired asset and select the check box next to it.
   d) In the "Add to..." menu, select "My List."
2. In the navigation pane, go to the "My List" node (**Tags > My List**) and make sure the target asset is displayed in the list of assets.

Next Step

At this point you are ready to link the assets. Continue to any one of the following sections, depending on how you wish to link the assets:

- "To Create a Hypertext Link to Another Asset"
- "To Link Two Assets by Inclusion," on page 181

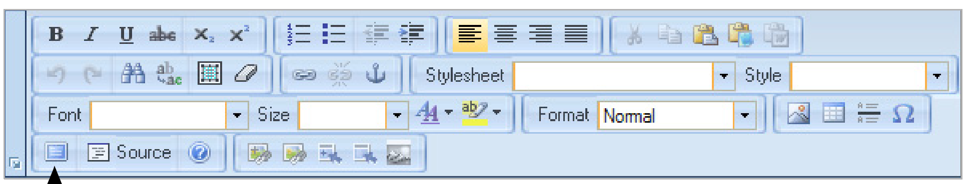
To Create a Hypertext Link to Another Asset

1. Ensure that all prerequisites starting on page 176 are met.
2. Open the referring asset in its "Edit" form.
3. Insert the link to the target asset:
   a. In the navigation pane, click **Tags > My List**.

      A list of assets you have added to the "My List" node are displayed in the top pane of the workspace area, above the referring asset's "Edit" form.

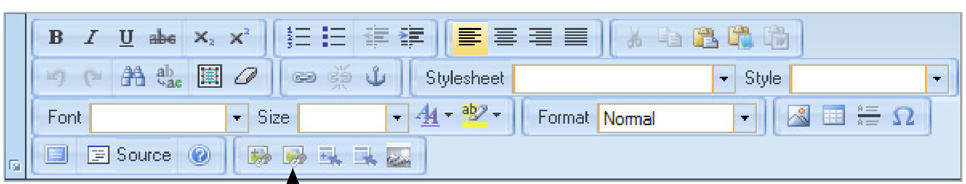
   b. Select the check box next to the asset you want to link to.
   c. In the desired field of the referring asset, select the text that you want to be hyperlinked. Alternatively, you can type new text anywhere in the field and select it.

      To work more comfortably, you can maximize the FCKEditor to fill your workspace. Click the **Maximize** *icon.*



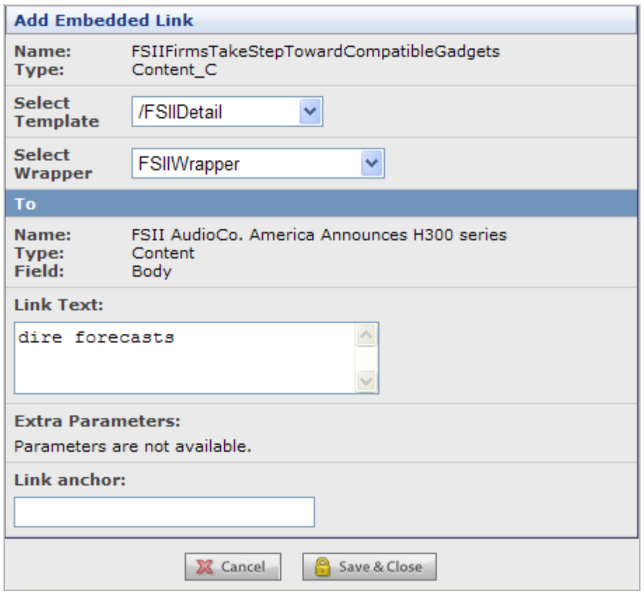
Maximize the editor size

   d. On the FCKEditor's toolbar, click the **Add asset link** icon.



Add asset link

The following pop-up window opens:



1) In the "Select Template" drop-down list, verify that the correct template is selected. This template will render the target asset when the hyperlink is clicked. If necessary, choose a different template.

2) In the "Link Text" field, verify the text that you selected to be the hyperlink (in step c on page 178). If necessary, edit the text.

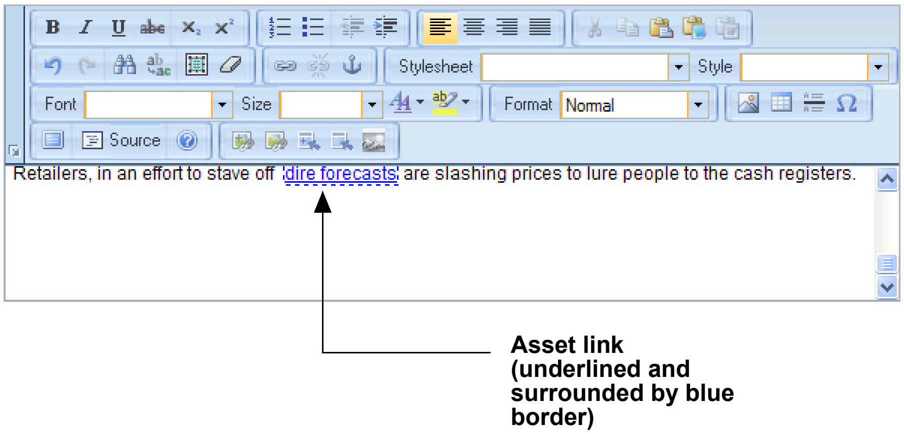
3) If the "Extra Parameters" section displays the "Name" and "Value" menus, you can use them to set the properties of the asset to which you are creating the link. Select the parameters that you need (one at a time), enter a value, and click **Add**.

Note

The "Extra Parameters" section is enabled only if developers have configured parameters for the template that is associated with the target asset. Otherwise, "Extra Parameters" displays the message "Parameters are not available."

4) Click **Save and Close** to save the hyperlink.

The pop-up window closes, and the linked text appears in the field, underlined and surrounded by a blue border, as shown below:



4. You can now work with the link as follows:

   a. Right-click the linked text to open its context menu. From the context menu you can:

      - Open Link
      - Change Linked Asset
      - Edit Properties
      - Remove Linked Asset

      Note: Remove Linked Asset removes the link function, but not the text of the link. To restore the link function, click **Ctrl-z** until the underline and blue border re-appear.

   b. You can format the text of the link by using the FCKEditor. One of your options is to use a style sheet to format the link (and other text) in the field:

      1) Select a style sheet from the Stylesheet drop-down list.

         Once you have selected a style sheet, its styles are made available to you, in the Style drop-down list.

      2) Apply different styles by highlighting the text and selecting the desired style from the Style drop-down list.

5. Save the referring asset:

   a. If you expanded the FCKeditor, click the **Maximize** icon to collapse the FCKEditor and view the entire asset.

   b. Click **Save and Close**.

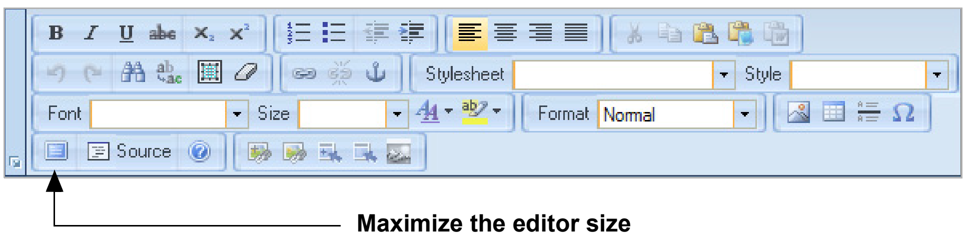
6. If the referring asset is previewable, click **Preview** (in the action bar) to preview and test the link. Click the link to display the target asset.

To Link Two Assets by Inclusion

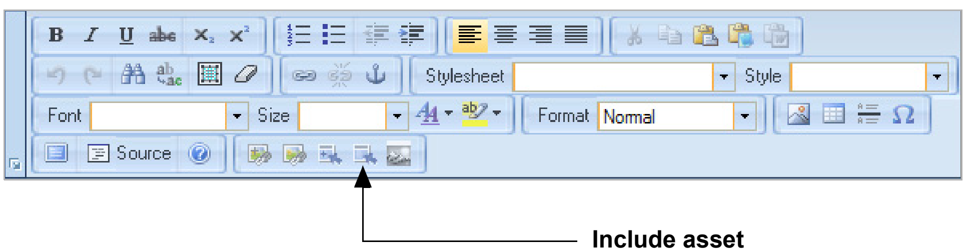
1. Ensure that all prerequisites starting on page 176 are met.
2. Open the referring asset in its "Edit" form.
3. Include the target asset:
   a. In the navigation pane, click **Tags > My List**

      A list of assets you have added to the "My List" node are displayed in the top pane of the workspace area, above the referring asset's "Edit" form.
   b. Select the check box next to the image asset you want to include.
   c. In the desired field of the referring asset, place your cursor at the point where you want to include the previewable content of the target asset.

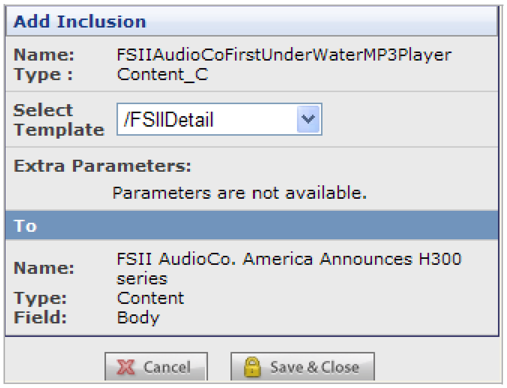
      To work more comfortably, you can maximize the FCKEditor to fill your workspace. Click the **Maximize** *icon.*



   d. Click the **Include asset** icon.



The following pop-up window opens:



1) In the "Select Template" drop-down list, verify that the correct template is selected. This template will render the target asset at its insertion point in the referring asset. If necessary, choose a different template.

2) If the "Extra Parameters" section displays the "Name" and "Value" menus, you can use them to set the properties of the asset you are including. Select the parameters that you need (one at a time), enter a value, and click **Add**.

> **Note**
>
> The "Extra Parameters" section is enabled only if developers have configured parameters for the template that is associated with the target asset. Otherwise, "Extra Parameters" displays the message "Parameters are not available."

3) Click **Save and Close**.

The pop-up window closes, and the target asset's previewable content is rendered within the referring asset by the template that you selected.

> **Note**
>
> If you click on the included asset, you will find that all of its content is selected. You cannot select its individual pieces of content. The content is editable only in the target asset (the source of content).
>
> When the target asset is edited, the included content in the referring asset is automatically updated, but not in real time. To view an update, you must save, close, and then re-open the referring asset.

4. You can now work with the included asset as follows:
   a. Right-click the included asset to open its context menu. From the context menu you can:
      - Change Included Asset
      - Edit Properties
      - Remove Included Asset
   b. Enter text before or after the included asset.
5. Save the referring asset:
   a. If you expanded the FCKeditor, click the **Maximize** icon to collapse the FCKEditor and view the entire asset.
   b. Click **Save and Close**.
6. If the referring asset is previewable, verify that the included asset is properly rendered (click **Preview**, in the action bar).

Linking Two Assets via an Image Asset

Company logos (and other images) are often used as links to various types of content: news about the company, products and services offered by the company, and so on. Content Server enables you to include an image asset in a given asset, and then hyperlink the image to another asset. Clicking the image renders the target asset's previewable content.

Note

If an image will be used to link two assets, the image must be part of an image asset.

This section contains prerequisite steps and instructions for linking two assets via an image asset. Before continuing with the rest of this section, determine whether you will be including the image from the "My List" node (located in the navigation pane, under the **Tags** tab), or from the "Image Picker":

- **Linking via an image from the "My List" node using FCKEditor**

  In the FCKEditor enabled field of the asset you are working with, you may want to include an image asset from the "My List" node. From the FCKEditor toolbar use the **Include asset** icon to include the image into the field. Use the **Add asset link** icon to hyperlink the included image to another asset.

- **Linking via an image from the Image Picker using FCKEditor**

  You might work with an asset that is not enabled with an "Image Picker." If you prefer to choose your image assets from the "Image Picker," FCKEditor is capable of invoking an "Image Picker." From the FCKEditor toolbar, use the **Pick an image to include** icon to access the "Image Picker," and select an image to include into the field. Use the **Add asset link** icon to hyperlink the included image to the target asset.

  Note

  The **Pick an image to include** icon is enabled by the developers of your site. If the icon has not been enabled then it will appear in grey on the FCKEditor toolbar. If this is the case, you can contact your administrator or, see "Linking via an Image from the "My List" Node" for an alternate method of linking two assets via an image asset.

Prerequisites

Before linking assets, you must verify that they can be linked. Use this section as a checklist. (It is assumed that you know how to edit and preview assets, and create them, if necessary. Basic instructions are given in various steps.)

Participating Assets

Three assets are involved in this procedure, and all three assets are on the same site:

- The referring asset (in which you will include and hyperlink the image asset)
- The image asset (which you will include in the referring asset)
- The target asset (to which you will link the image asset)

Referring Asset

- The referring asset displays the FCKeditor in the field where you will place the link. If you need instructions for verifying that FCKEditor is displayed, complete the following steps:

> **Note**
>
> If you are creating a new referring asset, you can start this procedure in the asset's "New" form. However, it is best to save the asset and then open its "Edit" form (to ensure against possible loss of any existing content, as you move from step to step).

1. Open the referring asset in its "Edit" form. If you need to find the referring asset, do the following:
   a) In the top bar, go to the "Search Criteria..." menu and select the asset type of the asset you want to find.
   b) In the "Search" field located in the top bar, enter the desired search criteria (if any) and click **Search**.
   c) In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.
2. Go to the field in which you would like to place the image asset. Click in the field to make sure it displays the FCKEditor.

> **Note**
>
> By default, FCKEditor is not displayed automatically when the asset's "Edit" form opens. Click in the field to display the FCKEditor. If the FCKEditor does not appear, then linking is not supported in the field. Contact your system administrator to have the field enabled with FCKEditor.

- If you intend to publish the referring asset, the asset must be previewable, including the field where you will include the image. (Ensure that the referring asset can be rendered by one of the templates listed in the asset's "Template" field, located in the **Metadata** section of the asset's form). For instructions on previewing assets, see "Previewing Assets," on page 128.

Image Asset

- The image asset is previewable. Ensure that ***only the image is rendered*** by one of the templates that is listed in the asset's "Template" field, located in the **Metadata** section of the asset's form.

> **Note**
>
> Rendering additional content (such as text) can interfere with and corrupt the linking process.

- Determine whether you will be including an image from the “Image Picker” or from the “My List” node:
  - **If you are including an image from the “My List” node**. The image asset is readily available for inclusion. Place the image asset into the “My List” node, located in the **Tags** tab of the navigation pane, for easy retrieval during the linking process.
    1) Find the image asset and place it in the “My List” node:
       a) In the top bar, go to the “Search Criteria...” drop-down menu, click the asset type of the asset you want to find.
       b) In the “Search” field located in the top bar, enter the desired search criteria (if any) and click **Search**.
       c) In the search results list, navigate to the desired asset and select the check box next to it.
       d) In the “Add to...” drop-down menu, select “My List.”
    2) In the navigation pane, go to the “My List” node (**Tags** > **My List**) and make sure the target asset is displayed in the list of assets.
  - **If you are including an image from the Image Picker**. The image you wish to include is available from the “Image Picker.” (Developers enable the “Image Picker” for the **Pick an image to include** icon. If more than one “Image Picker” exists, developers will also determine which “Image Picker” is rendered when the **Pick an image to include** icon is selected.)

Target Asset

The target asset is also previewable and readily available for linking.

- The target asset can be rendered by one of the templates listed in the asset’s “Template” field, located in the **Metadata** section of the asset’s form.
- (Optional) The target asset is placed in the “My List” node (in the navigation pane) for easy retrieval during the linking process. (For instructions about placing assets in the “My List” node, see step 1 on page 186.)

Note

Placing target assets in the “My List” node is most efficient when linking large numbers of target assets to a source asset. When you are linking only one target asset to a source asset, you can conduct a search for the target asset while working in the source asset’s “Edit” form. (If you were trying to link a large number of assets to a source asset, you would have to conduct a separate search for each target asset.) When you conduct a search for a target asset, the search results are rendered above the source asset’s “Edit” form. For information about searching for assets, see “Searching for Assets,” on page 104.

Next Step

At this point you are ready to link the assets. Continue to any one of the following sections, depending on where you will retrieve the image from:

- "Linking via an Image from the "My List" Node," on page 187
- "Linking via an Image from the Image Picker," on page 191

Linking via an Image from the "My List" Node

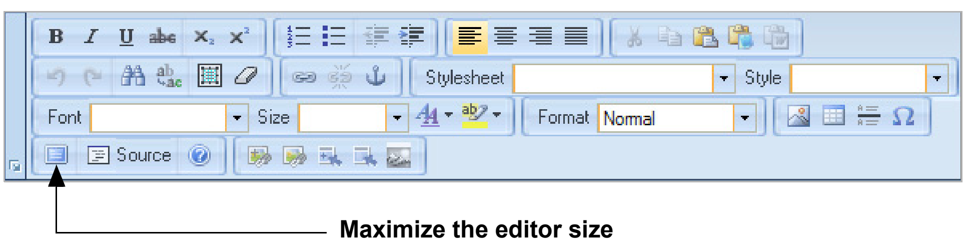
1. Assuming that all prerequisites starting on page 184 are met, continue as follows:

Include the image asset in the referring asset:

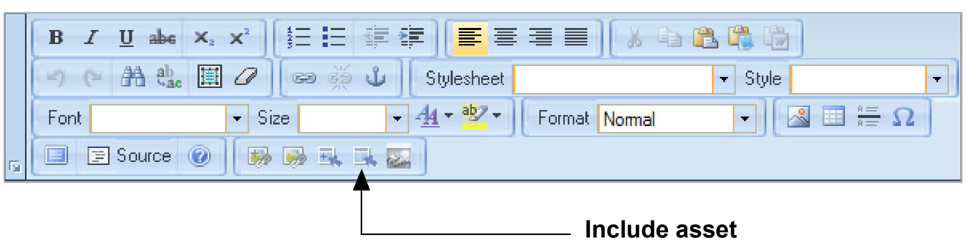
2. Open the referring asset in its "Edit" form.
3. Include the image asset:
   a. In the navigation pane, click **Tags > My List**

      A list of assets you have added to the "My List" node are displayed in the top pane of the workspace area, above the referring asset's "Edit" form.
   b. Select the check box next to the image asset you want to include.
   c. In the desired field of the referring asset, place your cursor at the point where you want the image asset to be rendered.

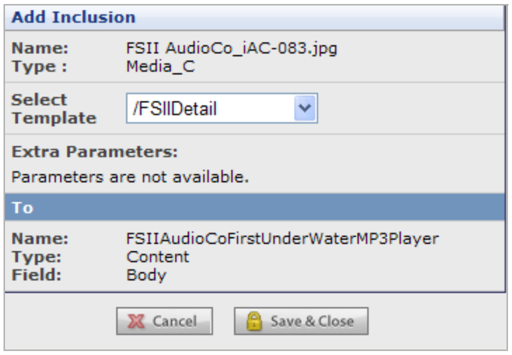
      To work more comfortably, you can maximize the FCKEditor to fill your workspace. Click the **Maximize** *icon.*



   d. On the FCKEditor toolbar, click the **Include asset** icon.



The following pop-up window opens:



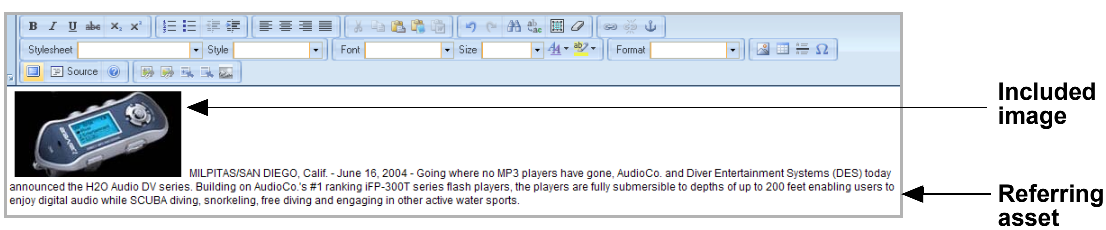
1) In the “Select Template” drop-down list, verify that the correct template is selected. This template will render the image asset at the insertion point. If necessary, choose a different template.

2) If the “Extra Parameters” section displays the “Name” and “Value” menus, you can use them to set the properties of the image you are including. Select the parameters that you need (one at a time), enter a value, and click **Add**.

> **Note**
>
> The “Extra Parameters” section is enabled only if developers have configured parameters for the template that is associated with the target asset. Otherwise, “Extra Parameters” displays the message “Parameters are not available.”

3) Click **Save and Close**.

The pop-up window closes, and the image is rendered in the field:



e. If you change your mind about the image or wish to make other adjustments, right-click the linked image to open its context menu. From the context menu you can:

- Change Included Asset
- Edit Properties
- Remove Included Asset

Link the image asset to the target asset:

4. Now that the image is rendered in the referring asset's field, create a hyperlink from the image to the target asset:

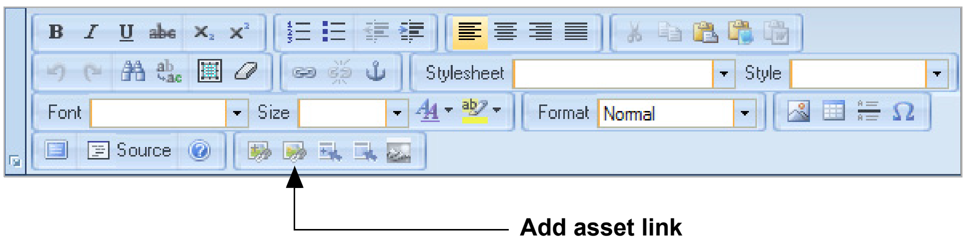
a. In the navigation pane, click **Tags > My List**

A list of assets you have added to the "My List" node are displayed in the top pane of the workspace area, above the referring asset's "Edit" form.

b. Select the check box next to the asset you want to link to.

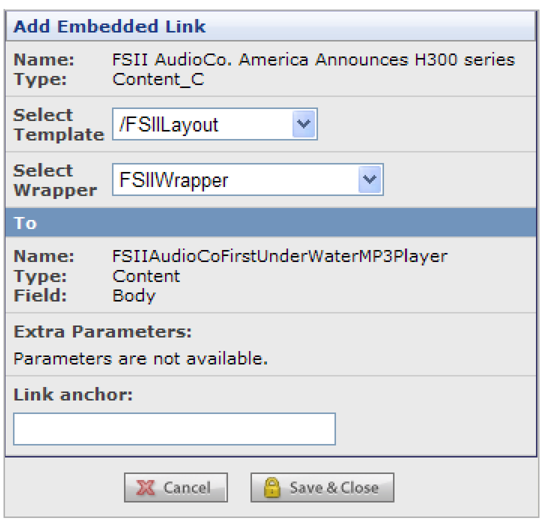
c. In the referring asset's field, select the image you have just inserted.

d. On the FCKEditor toolbar, click the **Add asset link** icon.



Add asset link

The following pop-up window opens:



1) In the "Select Template" drop-down list, verify that the correct template is selected. This template will render the target asset when the hyperlinked image is clicked. If necessary, choose a different template.

2) If the “Extra Parameters” section displays the “Name” and “Value” menus, you can use them to set the properties of the image you are including. Select the parameters that you need (one at a time), enter a value, and click **Add**.

Note

The “Extra Parameters” section is enabled only if developers have configured parameters for the template that is associated with the target asset. Otherwise, “Extra Parameters” displays the message “Parameters are not available.”

3) Click **Save and Close** to save the link.

The pop-up window closes, and the image you included in the field now appears as a hyperlink, surrounded by a blue border.

5. At this point, you can work with the image as follows:
   a. Right-click the linked image to open its context menu. From the context menu you can:
      - Open Link
      - Change Linked Asset
      - Edit Properties
      - Remove Linked Asset

      Note: Remove Linked Asset removes the link function, but not the included image. To restore the link function, click **Ctrl-z** until the blue border re-appears.
   b. Enter text before or after the linked image.
6. Save the referring asset:
   a. If you expanded the FCKeditor, click the **Maximize** icon to collapse the FCKEditor and view the entire asset.
   b. Click **Save Changes**.

Test the linked image:

7. If the referring asset is previewable, click **Preview**, in the action bar, to preview and test the linked image. Click the image to render the target asset.

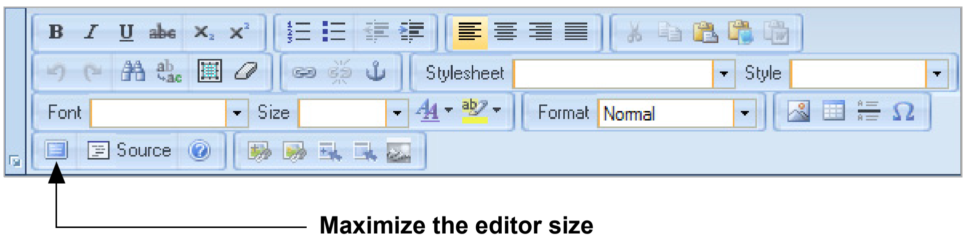
Linking via an Image from the Image Picker

1. Assuming that all prerequisites starting on page 184 are met, continue as follows:

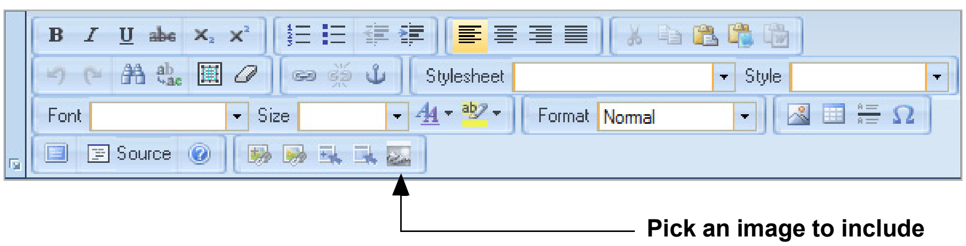
Include the image asset in the referring asset:

2. Open the referring asset in its "Edit" form.
3. Include the image:
   a. In the desired field of the referring asset, place your cursor at the point where you wish to include the image.

      *To work more comfortably, you can maximize the FCKEditor to fill your workspace. Click the **Maximize** icon.*

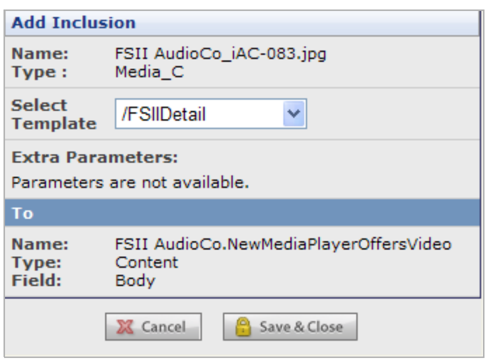


   b. Click the **Pick an image to include** icon.



The “Image Picker” window opens. Click the image that you want to include in the referring asset’s field.

The “Add Inclusion” pop-up window opens:



1) In the “Select Template” drop-down list, verify that the correct template is selected. This template will render the image at its insertion point in the referring asset. If necessary, choose a different template.

2) If the “Extra Parameters” section displays the “Name” and “Value” menus, you can use them to set the properties of the asset you are including. Select the parameters that you need (one at a time), enter a value, and click **Add**.

Note

The “Extra Parameters” section is enabled only if developers have configured the parameters for the template that is associated with the target asset. Otherwise, “Extra Parameters” displays the message “Parameters are not available.”

3) Click **Save and Close** to save the link.

The pop-up window closes, and the image is rendered within the referring asset by the template that you selected.

4. You can now work with the included image as follows:

Right-click the included image to open its context menu. From the context menu you can:

- Change Included Asset
- Edit Properties
- Remove Included Asset

Link the image asset to the target asset:

5. Now that the image is rendered in the field, create a hyperlink from the image to the target asset:

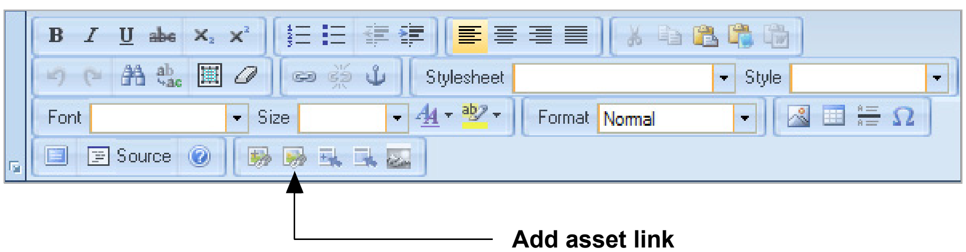
a. In the navigation pane, click **Tags > My List**

A list of assets you have added to the "My List" node appear in the top pane of the workspace area, above the "Edit" form of the referring asset.

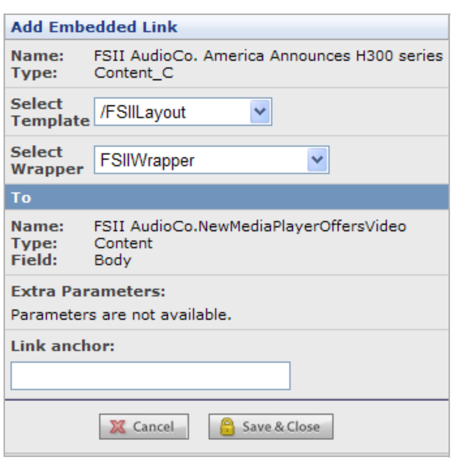
b. Select the check box of the asset you want to link to.

c. In the referring asset's field, select the image you just included.

d. On the FCKEditor toolbar, click the **Add asset link** icon.



The following pop-up window opens:



1) In the "Select Template" drop-down list, verify that the correct template is selected. This template will render the target asset when the hyperlinked image is clicked. If necessary, choose a different template.

2) If the "Extra Parameters" section displays the "Name" and "Value" menus, you can use them to set the properties of the asset you are including. Select the parameters that you need (one at a time), enter a value, and click **Add**.

Note

The "Extra Parameters" section is enabled only if developers have configured the parameters for the template that is associated with the target asset. Otherwise, "Extra Parameters" displays the message "Parameters are not available."

3) Click **Save and Close** to save the link.

6. At this point, you can work with the linked image as follows:

   a. Right-click the linked image to open its context menu. From the context menu you can:

      - Open Link
      - Change Linked Asset
      - Edit Properties
      - Remove Link

      Note: Remove Link removes the link function, but not the included image. To restore the link function, click **Ctrl-z** until the blue border re-appears.

   b. Enter text before or after the linked image.

7. Save the referring asset:

   a. If you expanded the FCKeditor, click the **Maximize** icon to collapse the FCKEditor and view the entire asset.

   b. Click **Save and Close**.

Test the linked image:

8. If the referring asset is previewable, click **Preview**, in the action bar, to preview and test the linked image. Click the image to render the target asset.

Creating a Target Asset from the Referring Asset's FCKEditor

If you are working with a given asset and wish to link it to an asset that has not been created yet, you can create the asset directly from the referring asset's FCKEditor enabled field(s). The type of link you insert into the field(s) depends on which icon you choose from the FCKEditor toolbar:

- **Create a hypertext link to the new asset**

  From the referring asset's FCKEditor toolbar, use the **Create and link a new asset** icon to create the target asset, and then to insert a hypertext link to the new target asset into the referring asset's field.

- **Include the new asset in the referring asset**

  From the referring asset's FCKEditor toolbar, use the **Create and include a new asset** icon to create the target asset, and then to include the new target asset's previewable content into the referring asset's field.

Prerequisites

Before creating a new asset from the FCKEditor enabled field of a referring asset, you must verify that the referring asset can be linked. Use this section as a checklist. (It is assumed that you know how to edit and preview assets, and create them, if necessary. Basic instructions are given in various steps.)

Participating Assets

Two assets are involved in this procedure. The target asset has not been created yet:

- The referring asset (in which you will create the target asset as well as the link).
- The target asset. You will create this asset from within the referring asset.

Referring Asset

- The referring asset displays the FCKEditor in the field where you will place the link. If you need instructions for verifying that FCKEditor is displayed, complete the following steps:

  Note

  If you are creating a new referring asset, you can start this procedure in the asset's "New" form. However, it is best to save the asset and then open its "Edit" form (to ensure against possible loss of any existing content, as you move from step to step).

  a. Open the referring asset in its "Edit" form. If you need to find the referring asset, do the following:

  1) In the top bar, go to the "Search Criteria..." drop-down menu and select the asset type of the asset you want to find.

  2) In the "Search" field located in the top bar, enter the desired search criteria (if any) and click **Search**.

3) In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

b. Go to the field in which you would like to place the link. Click in the field to make sure it displays the FCKEditor.

> **Note**
>
> By default, FCKEditor is not displayed automatically when the asset's "Edit" form opens. Click in the field to display the FCKEditor. If the FCKEditor does not appear, then linking is not supported in the field. Contact your system administrator to have the field enabled with FCKEditor.

- If you intend to publish the referring asset, the asset must be previewable, including the field where you will place the link. (Ensure that the referring asset can be rendered by one of the templates that is listed in the asset's "Template" field, located in the **Metadata** section of the asset's form. For instructions on previewing assets, see "Previewing Assets," on page 128.

Target Asset

You will create this asset in one of the following procedures, depending on how you wish to link to the new target asset:

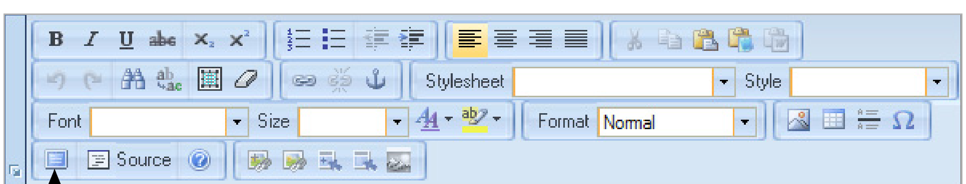
- "Insert a Hyperlink to the New Target Asset"
- "Include the Target Asset's Previewable Content," on page 199

Insert a Hyperlink to the New Target Asset

1. Ensure that all prerequisites starting on page 195 are met.
2. Open the referring asset in its "Edit" form.
3. Create and link to the target asset:

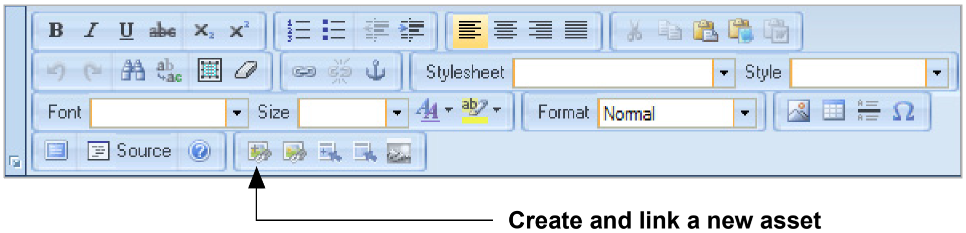
   a. In the desired field of the referring asset, select the text that you want to be hyperlinked. Alternatively, you can type new text anywhere in the field and select it.

   To work more comfortably, you can maximize the FCKEditor to fill your workspace. Click the **Maximize** *icon.*



Maximize the editor size

b. On the FCKEditor’s toolbar, click the **Create and link a new asset** icon.



The “Add Asset” window opens:

Add Asset

New

Type	Name
Attribute Editor	New Attribute Editor, FirstSiteII
Collection	New Collection
Collection	New Collection,HelloAssetWorld
Content Attribute	New Content Attribute, FirstSiteII
Content Definition	New Content Definition, FirstSiteII
Content Filter	New Content Filter, FirstSiteII
Content Parent Definition	New Content Parent Definition, FirstSiteII
Content Parent	New Content Parent, FirstSiteII
Content	New Content, FirstSiteII
CSElement	New CSElement, FirstSiteII
Dimension	New Dimension, FirstSiteII
DimensionSet	New DimensionSet, FirstSiteII
Document Attribute	New Document Attribute, FirstSiteII
Document Definition	New Document Definition, FirstSiteII
Document Filter	New Document Filter, FirstSiteII

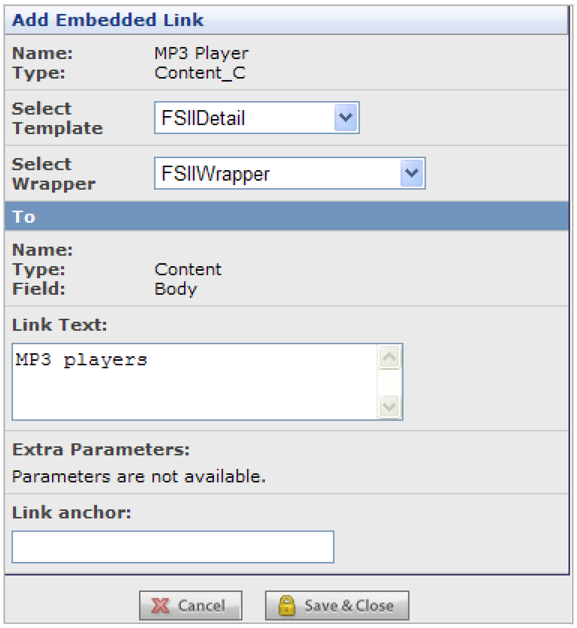
1) From the list of available asset types, select the asset type that you will use to create the target asset. If the asset type that you need is not available, contact your administrator.

> **Note**
>
> In the “Add Asset” window, only the asset types enabled by the developers of your system are available.

2) If the asset type you have selected requires you to choose assignees for the workflow process, select at least one user for each required role and click **Set Assignees**. For more information about the workflow process, see “Workflow,” on page 217.

3) The “New” form of the asset type you selected opens. Fill in the required fields and then click **Save** to save the new asset to Content Server. For instructions about working with an asset’s “New” form, see “Creating Assets,” on page 76.

The "Add Embedded Link" window opens:



a) In the "Select Template" drop-down list, verify that the correct template is selected. This template will render the target asset you created when the hyperlink is clicked. If necessary, choose a different template.

b) In the "Link Text" field, verify the text that you selected to be the hyperlink. If necessary, edit the text.

c) If the "Extra Parameters" section displays the "Name" and "Value" menus, you can use them to set the properties of the asset to which you are creating the link. Select the parameters that you need (one at a time), enter a value, and click **Add**.

> **Note**
>
> The "Extra Parameters" section is enabled only if developers have configured the parameters for the template that is associated with the target asset. Otherwise, "Extra Parameters" displays the message "Parameters are not available."

d) Click **Save and Close** to save the hyperlink.

The pop-up window closes, and the linked text appears in the field, underlined and surrounded by a blue border.

4. You can now work with the link as follows:
   a. Right-click the linked text and open its context menu. From the context menu you can:
      - Open Link
      - Change Linked Asset
      - Edit Properties
      - Remove Linked Asset

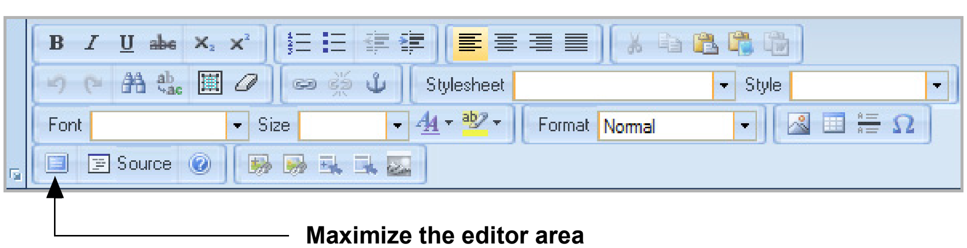
        Note: Remove Linked Asset removes the link function, but not the text of the link. To restore the link function, click **Ctrl-z** until the underscore re-appears.
   b. You can format the text of the link by using the FCKEditor. One of your options is to use the style sheet to format the link (and other text) in the field:
      1) Select a style sheet from the **Stylesheet** drop-down list.

         Once you have selected a style sheet, its styles are made available to you, in the **Style** drop-down list.
      2) Apply different styles by highlighting the text and selecting the desired style from the **Style** drop-down list.
5. Save the referring asset:
   a. If you expanded the FCKeditor, click the **Maximize** icon to collapse the FCKEditor and view the entire asset.
   b. Click **Save and Close**.
6. If the referring asset is previewable, click **Preview** (in the action bar) to test the link. Click the link to display the new asset.

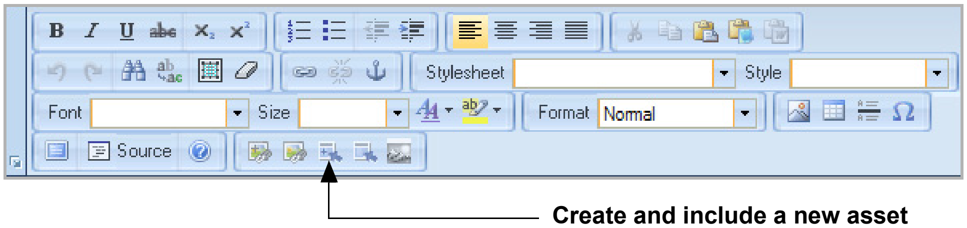
Include the Target Asset's Previewable Content

1. Ensure that all prerequisites starting on page 195 are met.
2. Open the referring asset in its "Edit" form.
3. Create and include the target asset:
   a. In the desired field of the referring asset, place your cursor at the point where you want to include the previewable content of the target asset.

      To work more comfortably, you can maximize the FCKEditor to fill your workspace. Click the **Maximize** *icon.*



b. Click the **Create and include a new asset** icon.



The "Add Asset" window opens:

Add Asset

New

Type	Name
Attribute Editor	New Attribute Editor, FirstSiteII
Collection	New Collection
Collection	New Collection,HelloAssetWorld
Content Attribute	New Content Attribute, FirstSiteII
Content Definition	New Content Definition, FirstSiteII
Content Filter	New Content Filter, FirstSiteII
Content Parent Definition	New Content Parent Definition, FirstSiteII
Content Parent	New Content Parent, FirstSiteII
Content	New Content, FirstSiteII
CSElement	New CSElement, FirstSiteII
Dimension	New Dimension, FirstSiteII
DimensionSet	New DimensionSet, FirstSiteII
Document Attribute	New Document Attribute, FirstSiteII
Document Definition	New Document Definition, FirstSiteII
Document Filter	New Document Filter, FirstSiteII

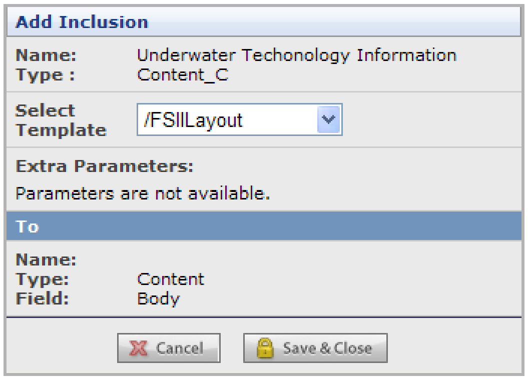
1) From the list of available asset types, select the asset type that you will use to create the target asset. If the asset type that you need is not available, contact your administrator.

> **Note**
>
> In the "Add Asset" window, only the asset types enabled by the developers of your system are available.

2) If the asset type you have selected requires you to choose assignees for the workflow process, select at least one user for each required role and click **Set Assignees**. For more information about the workflow process, see "Workflow," on page 217.

3) The "New" form of the asset type you selected opens. Fill in the required fields and then click **Save** to save the new asset to Content Server. For instructions about working with an asset's "New" form, see "Creating Assets," on page 76.

The following pop-up window opens:



a) In the "Select Template" drop-down list, verify that the correct template is selected. This template will render the target asset at its insertion point in the referring asset. If necessary, choose a different template.

b) If the "Extra Parameters" section displays the "Name" and "Value" menus, you can use them to set the properties of the asset you are including. Select the parameters that you need (one at a time), enter a value, and click **Add**.

> **Note**
>
> The "Extra Parameters" section is enabled only if developers have configured parameters for the template that is associated with the target asset. Otherwise, "Extra Parameters" displays the message "Parameters are not available."

c) Click **Save and Close**.

The pop-up window closes, and the previewable content of the target asset you created is rendered in the referring asset by the template that you selected.

> **Note**
>
> If you click on the included asset, you will find that all of its content is selected. You cannot select its individual pieces of content. The content is editable only in the target asset (the source of content).
>
> When the target asset is edited, the included content in the referring asset is automatically updated, but not in real time. To view an update, you must save, close, and then re-open the referring asset.

4. You can now work with the included content as follows:
    a. Right-click the included content and open the context menu. From the context menu you can:
        - Change Included Asset
        - Edit Properties
        - Remove Included Asset
5. Save the referring asset:
    a. If you expanded the FCKeditor, click the **Maximize** icon to collapse the FCKEditor and view the entire asset.
    b. Click **Save and Close**.
6. If the referring asset is previewable, verify that the included content is properly rendered (click **Preview** in the action bar).

Linking Assets to URLs

Using FCKEditor, you can link Content Server assets to URLs by creating an unmanaged link. A link is said to be "unmanaged" if it is not stored in its own field in Content Server's database. The link can be created directly within any field of a Content Server asset, but it cannot be managed as an asset. As a result, the user who creates an unmanaged link to a URL must manually validate the URL.

> **Note**
>
> In the Dash interface the only link you can create to a URL is an "unmanaged" link. In the Advanced interface you have the option of creating a "managed" link as well. A "managed" link enables you to insert a validated link (that is, an asset of type "Link") into the content of an asset. For more information (and instructions) on creating managed links to URLs, see the *Content Server Advanced User's Guide.*

The extent to which this capability is available to you depends on whether FCKEditor is configured for your custom asset types. For example, the "Content" asset type that ships with the FirstSite II sample site is configured with an FCKEditor in its "Body" field. Therefore the "Body" field supports the creation of an unmanaged link described above. The rest of this section describes how to link assets to URLs.

To create an unmanaged link to a URL

1. Find the referring asset (in which you will specify a URL) and open its "Edit" form. If you need to find the referring asset, do the following:
   a. In the top bar, go to the "Search Criteria..." drop-down menu, click the asset type of the asset you want to find.
   b. In the "Search" field located in the top bar, enter the desired search criteria (if any) and click **Search**.
   c. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

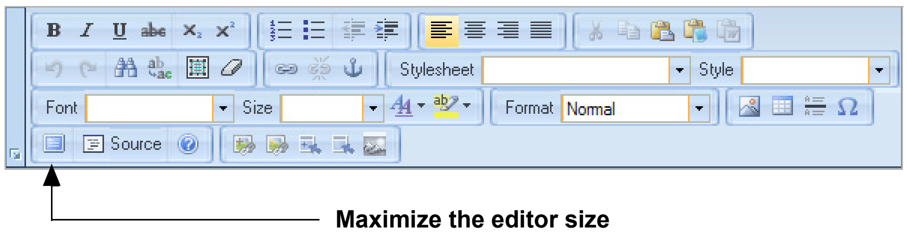
   > **Note**
   >
   > If you are creating a new referring asset, you can start this procedure in the asset's "New" form. However, it is best to save the asset and then open its "Edit" form (to ensure against possible loss of any existing content, as you move from step to step).

2. Go to the field in which you would like to place the link. Click in the field to make sure it displays the FCKEditor.

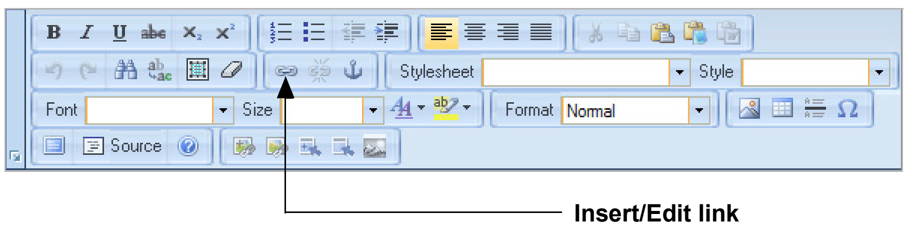
   > **Note**
   >
   > By default, FCKEditor is not displayed automatically when the asset's "Edit" form opens. Click in the field to display the FCKEditor. If the FCKEditor does not appear, then linking is not supported in the field. Contact your system administrator to have the field enabled with FCKEditor.

3. In the desired field, select the text that you want to be the hyperlink. Alternatively, you can type new text anywhere in the field and select it.

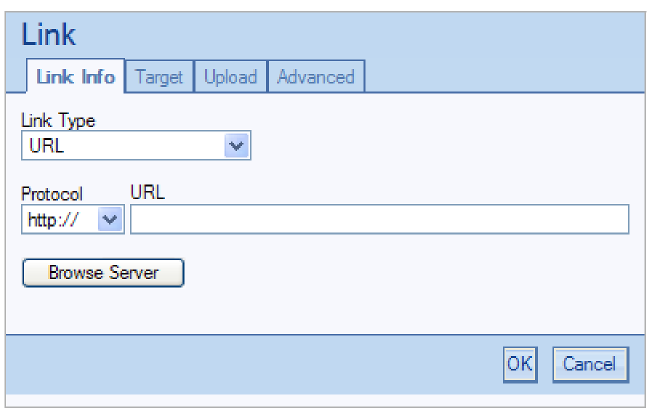
   To work more comfortably, you can maximize the FCKEditor to fill your workspace. Click the **Maximize** *icon.*



4. On the FCKEditor toolbar, click the **Insert/Edit Link** icon.

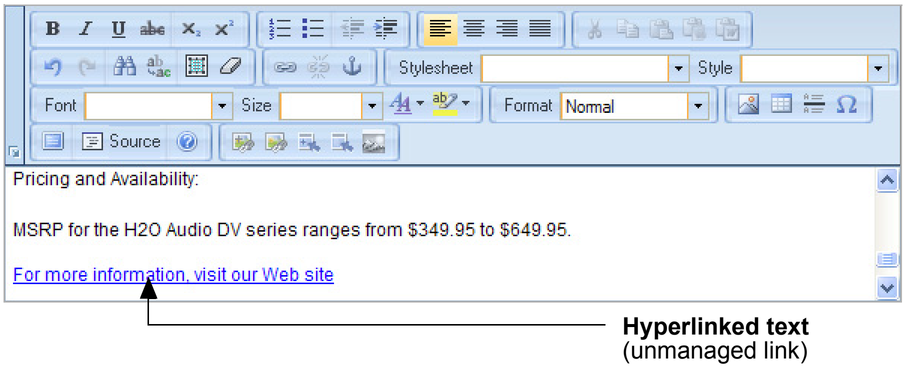


   The following pop-up window opens:



   a. In the “Link Type” field, select **URL**.
   b. In the “URL” field, type the URL of the Web site you wish to link to.
   c. Click **OK** to convert the selected text to a link.

The pop-up window closes, and the hyperlinked text appears underlined in the field, as shown below:



5. If you wish to make adjustments to the link, right-click the link to open its context menu. From the context menu you can:
   - Cut
   - Copy
   - Paste
   - Open Link
   - Edit Link
   - Remove Link

   Note: Remove Link removes the link function, but not the text of the link. To restore the link function, click **Ctrl-z** until the underscore re-appears.
6. You can format the text of the link by using the FCKEditor. One of your options is to use a style sheet to format the link (and other text) in the field.
   a. Select a style sheet from the **Stylesheet** drop-down list.

      Once you have selected a style sheet, its styles are made available to you, in the **Style** drop-down list.
   b. Apply different styles by highlighting the text in the field and selecting the desired style from the **Style** drop-down list.
7. Save the referring asset:
   a. If you expanded the FCKeditor, click the **Maximize** icon to collapse the FCKEditor and view the entire asset.
   b. Click **Save and Close**.
8. Click **Preview**, to view and test the link. Click the link to open the corresponding Web page in the browser window.

Chapter 11

Approval for Publishing

The goal of using Content Server is to publish content to a web site where site visitors can read and interact with that content. Before an asset can be published, it has to be approved for publishing.

This chapter describes the procedures used to approve assets for publishing. It includes the following sections:

Overview

Before an asset can be published, it must be **approved** for publishing. Requiring approval is a safeguard against publishing an asset whose dependent assets are not ready to be published. This prevents broken links on the delivery system. You approve assets for one or more **destinations** that the administrator sets up on your site. Having multiple destinations allows for the use of multiple publishing methods, such as Mirror to Server or Export to Disk. (For more information on destinations and available publishing methods, see the *Content Server Advanced Interface User's Guide*.)

Asset approval can be either manual or automatic. You can manually approve assets one at a time from the **Publishing** section of the asset's "Inspect" form. If the asset has dependent assets that need approval, Content Server displays a list of dependent assets which you can then approve in bulk. You cannot, however, perform bulk approval on a group of assets of your own choice; this capability is reserved for the administrator.

Asset approval can also be automated. For example, your administrator can configure a workflow process in such a way that its final step automatically approves assets in the workflow for publishing to one or more destinations.

Dependencies

Dependencies are conditions that determine whether an asset can be published. An asset dependency exists when there is an association of some kind between assets. For example, a "Product" asset has an association with a "Datasheet" asset. The "Datasheet" asset has an association with three "Image" assets. Two of these images have associations with "Article" assets. This tree hierarchy forms a set of parent/child dependencies among all these assets.

The **approval status** of an asset indicates whether the asset can be safely published; that is, whether any dependency conflicts exist. An asset's approval status is determined by its dependency relationships, which include the approval status of all assets associated with a particular asset, as well as the dependency relationships of those associated assets.

For more information on how Content Server calculates asset dependencies during approval and publishing, see the publishing chapter of the *Content Server Advanced Interface User's Guide*.

Approval States

Because of the dependencies between assets, as well as the nature of the dependencies, approving an asset involves the concept of **approval states**. For example, "held" is an approval state an asset enters when the asset is approved for publishing, but its dependent assets are not. In such case, the asset is then held from publishing until its dependents are approved. See "Approval States," on page 214 for detailed descriptions of the possible approval states an asset can enter.

If an asset enters an approval state that prevents publication, Content Server displays a list of dependent assets that require approval. Once all assets are approved, they can be published.

To learn more about the approval and publishing mechanisms employed by Content Server, see the *Content Server Advanced Interface User's Guide*.

Approval Tasks

This section describes how to approve assets for publishing.

This section describes the following tasks:

- Approving an Asset for Publishing
- Checking an Asset's Approval Status

Approving an Asset for Publishing

The following procedure describes how to manually approve an asset for publishing. Before approving an asset for publishing, you should preview it first.

To manually approve an asset for publishing

1. Log in to the site you want to work with.
2. Find and open the asset you want to approve for publishing:
   - **If the asset is currently assigned to you to work on:**
     a. In the **Tags** tree, click **My Assignments**. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

        Content Server displays a list of assets currently assigned to you to work on.

     b. Navigate to the desired asset and click its name.

        Content Server displays the asset's "Inspect" form.
   - **If the asset is not currently assigned to you to work on:**
     a. Do one of the following:
        - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
        - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

        For more information on finding assets, see "Finding Assets," on page 102.

     b. In the search results list, navigate to the desired asset and click its name.

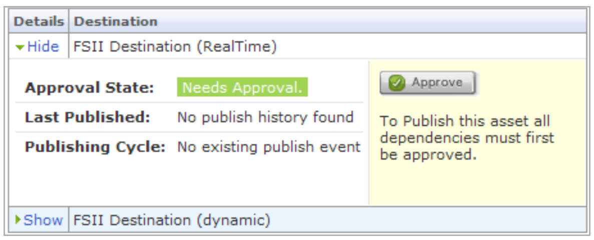
        Content Server displays the asset in the "Inspect" form.
3. (Optional) To preview the asset before you approve it for publishing, click **Preview** in the action bar.

   Content Server opens a new browser window displaying the asset in its rendered form.
   - If you are satisfied with the way the asset looks, close the preview window and continue to the next step.
   - If you want to make changes to the asset, close the preview window and click **Edit** in the action bar to open the asset's "Edit" form. Make your changes, and click **Save & Close** to save the asset.
4. Click **Publishing** in the section selector.

5. In the **Publishing** section, click **Show** for the destination for which you want to approve the asset.

> **Note**
>
> - You can approve an asset for only one destination at a time; repeat this procedure to approve the asset for additional destinations.
> - Consult your administrator to find out where (to which destinations) and how (using which publishing method) your content is published from your system.

Content Server displays the asset's details for the selected destination.



If today's date is out of the start/end date range specified in the asset's metadata, a warning message appears at the top of the window, indicating that today's date is out of the start/end date range.

You can still approve the asset. However, note that if

- the approved asset is published after its expiration date *and*
- the template for its parent page includes the `asset:filterassetsbydate` tag,

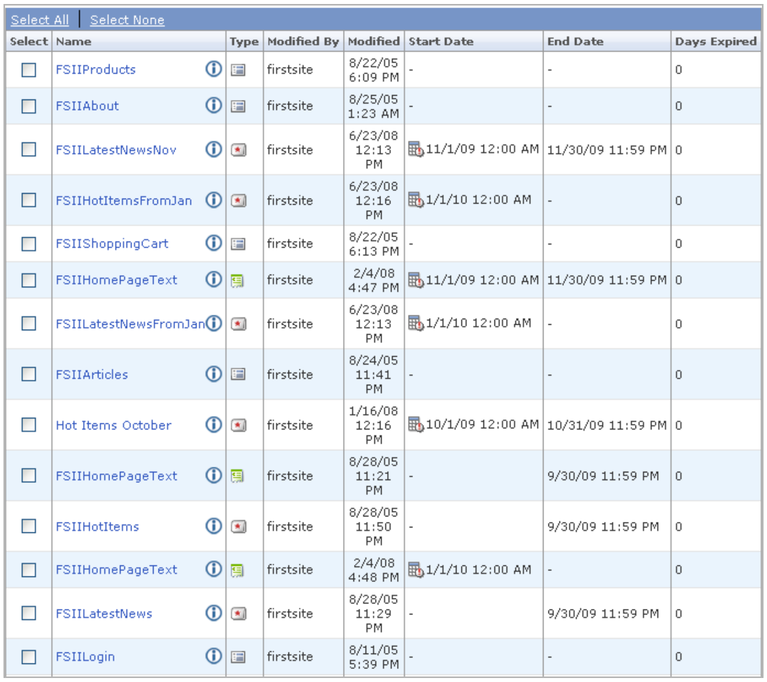
the asset will **not** display on the web site. See your site administrator for further information about the `asset:filterassetsbydate` tag. For more information about start and end dates, see "Using Start and End Dates," on page 145.

Continue with the steps below to approve the asset (or select **Cancel**).

6. Click **Approve**. At this point, one of the following happens:

- If the asset has no dependencies, Content Server displays a message confirming the approval of the asset.
- If the asset has dependencies that are preventing publication, Content Server notifies you of that fact and displays the **Click here to approve dependencies...** link. Do the following:

1) Click the link to display a list of the dependent assets.



Select All | Select None

Select	Name	Type	Modified By	Modified	Start Date	End Date	Days Expired
☐	FSIIProducts		firstsite	8/22/05 6:09 PM	-	-	0
☐	FSIIAbout		firstsite	8/25/05 1:23 AM	-	-	0
☐	FSIILatestNewsNov		firstsite	6/23/08 12:13 PM	11/1/09 12:00 AM	11/30/09 11:59 PM	0
☐	FSIIHotItemsFromJan		firstsite	6/23/08 12:16 PM	1/1/10 12:00 AM	-	0
☐	FSIIShoppingCart		firstsite	8/22/05 6:13 PM	-	-	0
☐	FSIIHomePageText		firstsite	2/4/08 4:47 PM	11/1/09 12:00 AM	11/30/09 11:59 PM	0
☐	FSIILatestNewsFromJan		firstsite	6/23/08 12:13 PM	1/1/10 12:00 AM	-	0
☐	FSIIArticles		firstsite	8/24/05 11:41 PM	-	-	0
☐	Hot Items October		firstsite	1/16/08 12:16 PM	10/1/09 12:00 AM	10/31/09 11:59 PM	0
☐	FSIIHomePageText		firstsite	8/28/05 11:21 PM	-	9/30/09 11:59 PM	0
☐	FSIIHotItems		firstsite	8/28/05 11:50 PM	-	9/30/09 11:59 PM	0
☐	FSIIHomePageText		firstsite	2/4/08 4:48 PM	1/1/10 12:00 AM	-	0
☐	FSIILatestNews		firstsite	8/28/05 11:29 PM	-	9/30/09 11:59 PM	0
☐	FSIILogin		firstsite	8/11/05 5:39 PM	-	-	0

If an information icon displays next to an asset's start or end date, it indicates that today's date is out of the start/end date range (this information displays in a tooltip as you hover over the icon).

You can still approve the asset; however, note that if:

- the approved asset is published after its expiration date *and*
- the template for its parent page includes the `asset:filterassetsbydate` tag,

the asset will **not** display on the web site. See your site administrator for further information about the `asset:filterassetsbydate` tag. For more information about start and end dates, see "Using Start and End Dates," on page 145.

2) Continue with the steps below to approve the asset (or select **Cancel**).

3) At the top of the list, click **Select All** to select all assets in the list.In the action bar, click **Approve Blocking Assets**.

Content Server approves the dependent assets and calculates their dependencies. If any of the dependent assets have their own dependencies, Content Server displays a list of the dependent assets' dependencies; again, click **Select All**, and then click **Approve Blocking Assets**. Continue this process until all dependencies for all assets are approved.

When all dependencies for the original asset are approved, Content Server displays a message confirming the original asset is approved for publishing to the selected destination.

Checking an Asset's Approval Status

To check an asset's approval status

1. Log in to the site you want to work with.
2. Find and open the asset you want to approve for publishing:
   - **If the asset is currently assigned to you to work on:**
     a) In the **Tags** tree, click **My Assignments**. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

        Content Server displays a list of assets currently assigned to you to work on.

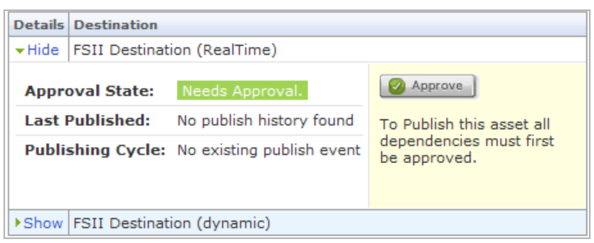
     b) Navigate to the desired asset and click its name.

        Content Server displays the asset's "Inspect" form.
   - **If the asset is not currently assigned to you to work on:**
     a. Do one of the following:
        - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
        - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

        For more information on finding assets, see "Finding Assets," on page 102.

     b. In the search results list, navigate to the desired asset and click its name.

        Content Server displays the asset in the "Inspect" form.
3. Click **Publishing** in the section selector.
4. In the **Publishing** section, click **Show** next to the destination for which you want to check the asset's approval status. Content Server displays the asset's details for the selected destination.



The form displays the status of the asset for the selected destination. The options available in the form are:

- **Approval State** – describes the asset's present approval state. For more information, see "Approval States," on page 214.
- **Last Published –** denotes when the asset was last published to the selected destination.
- **Publishing Cycle** – denotes the publishing session, if one is running, in which the asset is being published.
- **Approve** button – appears only if the asset has not been approved yet. Approves the asset for publishing to the selected destination. If the asset has dependencies

preventing publication, the **Click here to approve dependencies...** link appears when you click **Approve**.

- **Unapprove** button – appears only if the asset has already been approved. Removes the asset from the publishing queue for the selected destination. When you use this function, all assets that depend on this asset (that is, the asset's parents) are removed from the publishing queue as well.

  1) **Click here to approve dependencies...** link – clicking this link displays the asset's dependencies which are preventing the asset's publication.

Select All | Select None

Select	Name	Type	Modified By	Modified	Start Date	End Date	Days Expired
	FSIIProducts		firstsite	8/22/05 6:09 PM	-	-	0
	FSIIAbout		firstsite	8/25/05 1:23 AM	-	-	0
	FSIILatestNewsNov		firstsite	6/23/08 12:13 PM	11/1/09 12:00 AM	11/30/09 11:59 PM	0
	FSIIHotItemsFromJan		firstsite	6/23/08 12:16 PM	1/1/10 12:00 AM	-	0
	FSIIShoppingCart		firstsite	8/22/05 6:13 PM	-	-	0
	FSIIHomePageText		firstsite	2/4/08 4:47 PM	11/1/09 12:00 AM	11/30/09 11:59 PM	0
	FSIILatestNewsFromJan		firstsite	6/23/08 12:13 PM	1/1/10 12:00 AM	-	0
	FSIIArticles		firstsite	8/24/05 11:41 PM	-	-	0
	Hot Items October		firstsite	1/16/08 12:16 PM	10/1/09 12:00 AM	10/31/09 11:59 PM	0
	FSIIHomePageText		firstsite	8/28/05 11:21 PM	-	9/30/09 11:59 PM	0
	FSIIHotItems		firstsite	8/28/05 11:50 PM	-	9/30/09 11:59 PM	0
	FSIIHomePageText		firstsite	2/4/08 4:48 PM	1/1/10 12:00 AM	-	0
	FSIILatestNews		firstsite	8/28/05 11:29 PM	-	9/30/09 11:59 PM	0
	FSIILogin		firstsite	8/11/05 5:39 PM	-	-	0

  If an information icon displays next to an asset's start or end date; it indicates that today's date is out of the start/end date range (this information displays in a tooltip as you hover over the icon).

  You can still approve the asset; however, note that if:

  - the approved asset is published after its expiration date *and*
  - the template for its parent page includes the `asset:filterassetsbydate` tag,

  the asset will **not** display on the web site. See your site administrator for further information about the `asset:filterassetsbydate` tag. For more information about start and end dates, see "Using Start and End Dates," on page 145.

- Click **Select All** and then click **Approve Blocking Assets** to approve the asset's dependencies. If any of the dependent assets have their own dependencies, Content Server displays a list of the dependent assets' dependencies; again, click **Select All**, and then click **Approve Blocking Assets**. Continue this process until all dependencies for all assets are approved.

Approval States

The following table lists the approval states that can appear in the **Approval State** field in an asset's publishing details form for a destination, what the states mean, and the action to take, as appropriate:

State	Meaning
Approved	(Informational) This asset will be published during the next publishing session to this destination, unless the asset, or one of its dependent assets (in Exact dependencies), is edited.
Checked Out	(Action may be required) The asset is checked out under revision tracking. Although approved, it cannot be published until revision tracking relinquishes control in one of the following ways: • Checkin - the asset must be reapproved. • Undo Checkout - the asset remains approved and can be published. • Rollback - the asset must be reapproved.
Held	(Action required) The asset will be held until the dependents are approved. Click the **Click here to approve dependencies...** link to view and approve the dependents.
Needs Approval	(Action required) The asset must be approved. Click **Approve** to initiate the approval process.

Removing Assets from the Publishing Queue

If you decide not to publish an approved asset, you can **unapprove** the asset. When you unapprove, Content Server removes the asset from the publishing queue (for the given destination) and changes its status to “Needs Approval.” If the unapproved asset is a child (referenced asset), Content Server removes the parent (referring) assets from the publishing queue for the destination and changes their approval states to “Held.”

To remove an asset from the publishing queue

1. Log in to the site you want to work with.
2. Find and open the asset which you want to unapprove:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see “Finding Assets,” on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the “Inspect” form.
3. Click **Publishing** in the section selector.

   Content Server displays the **Publishing** section of the asset form.
4. In the form, select the destination for which you want to unapprove the asset.

   Content Server displays the asset’s details for the selected destination.
5. Click **Unapprove**.

   Content Server removes the asset from the publishing queue and changes its approval state to “Needs Approval.” If the asset is a child (referenced asset) of one or more assets in the publishing queue, Content Server removes the parent (referring) assets from the queue and changes their approval states to “Held.”

Chapter 12

Workflow

Most web sites are produced by a team of people in which different individuals assemble content, edit and review it, decide what goes where and when to update the pages. Work flows from one person to the next in a predictable way, and that process is called **workflow**.

This chapter presents a brief overview of workflow concepts followed by procedures on how to perform specific tasks related to workflow. It includes the following sections:

Overview

The following sections describe basic workflow concepts and terminology.

Note

In addition to the functionality described in this chapter, Content Server provides the following workflow functionality through the Advanced interface:

- **Workflow groups** – allow you to manage a defined set of assets in a coordinated manner that allows those assets to reach the end of the workflow process together, prior to publishing.
- **Workflow reports** – allow you to track the progression of assets and user assignments in workflow.

For information on workflow groups and reports, see the *Content Server Advanced Interface User's Guide.*

Workflow and Assets

Assets can (but do not have to) be assigned to a **workflow**. A workflow routes an asset through a series of editorial tasks (states) by assigning the tasks to the appropriate users at the appropriate times. Either specific assets or all assets of a certain type can be assigned to a workflow.

Depending on how your site is configured, assets might be assigned to a workflow either automatically (for example, when you create a new asset) or manually. The workflow system lets Content Server direct and track the assignment of assets to users and specifies what users can do with those assets through permissions.

The flow of the editorial tasks performed on the asset, as well as who is authorized to perform those tasks at each point in the workflow is defined by a **workflow process**. The workflow administrator can define as many workflow processes per asset type as needed.

Note

During workflow, the asset is not electronically transferred from one person to the next. What is transferred is permissions to the asset. The asset itself remains in its original location in the database throughout the workflow process and throughout its lifetime in Content Server.

States and Steps

A workflow process defines a series of **states**. A state is a point in the workflow process that represents the status of the asset at that point, for example, “Ready to Edit” or “Ready for Approval.”

States are linked together in a specific order by **steps**. A step is the movement of the asset between states. Because creating workflow steps links workflow states in a specific order, creating steps in a workflow process is what organizes the process. In each step, the asset goes from a start (“from”) state to an end (“to”) state. When creating the workflow process, the administrator defines the states and links them via the appropriate steps.

Steps and states have names; for example, in the FirstSite II sample site, “Send for Approval” is a step originating from the “Ready to Edit” state and resulting in the “Ready for Approval” state. An asset can move from one state to another via more than one step. For example, an asset that is ready for approval can be rejected because of factual errors or stylistic problems, each type of rejection having its own step.

Assets are assigned to users by role. As an asset progresses through the workflow, each step assigns it to users holding roles authorized to work on the asset in the next state. For each step, there is at least one role authorized to complete work on an asset and allow it to continue moving through the workflow. In certain cases, a user holding the appropriate role can choose between steps; for example, a user holding the Approver role can either approve or reject an asset assigned to him/her for approval.

When you log in to Content Server, the “Quick Info” pane provides a summary of your present workload, from which you can access a list of your assignments. (You can also see this list by selecting the **My Assignments** tag in the **Tags** tree.) When your work on the asset is complete, you use the **Finish Assignment** function to invoke the next step in the workflow; the workflow process then moves the asset to the next state and assigns the asset to the appropriate users. Note that a step can be conditional; that is, certain users or all users can be prevented from taking a step until some condition is met.

Users, Roles, and Participants

A **user** in Content Server is a person who is assigned a Content Server user name which he/she uses to identify him/herself and to log in to the system. What a user can or cannot do is determined by the role (or roles) assigned to that user by the administrator.

A **role** describes and determines the function(s) of a user in a CM site by granting him/her permissions to perform specific functions; in the context of workflow, these permissions are called **function privileges**.

The workflow process grants roles (not individual users) the appropriate function privileges. The function privileges are enforced only when an asset has been assigned to a workflow. Function privileges depend not only on the user’s role, but also on the state of the asset and whether or not the asset has been assigned to the user.

Note

Because function privileges are granted to a user through his/her role(s), they function independently of the access permissions assigned by the administrator at the user level.

For example, a user might not normally have the permission to edit “Content” assets, but he/she can have the function privilege to do so if he/she has the Editor role, is participating in a workflow process for “Content” assets, and the asset he/she wants to edit is in the appropriate workflow state.

Each role required by a particular workflow state in a workflow process is a participating role. Participating roles are chosen for each state in a workflow process by the administrator. Each user whose assigned role(s) match those required by that workflow state is therefore a **participant** for that state in the workflow process and is authorized to take the workflow step leading from that state to the next state.

Unless the administrator decides otherwise, assets placed in workflow are assigned to all available participants for a given role. You can, however, limit which users can work with a particular asset by choosing the desired assignees from among the participants available in each participating role.

An **assignee** is a workflow participant chosen to work on a specific assignment. The ability to choose assignees is granted to specific roles, as defined in the workflow process. Assignees are set when an asset is assigned to a workflow, but can also be changed when an asset is already in a workflow process. When choosing assignees, you select at least one user for each role.

When assignees are set for a given asset in the workflow, only the chosen assignees will see the asset in their assignment lists, and only they will have to complete the assignment before the workflow process changes the state of the asset.

Workflow Assignments

An assignment is an asset that a chosen participant (an assignee) is (or is supposed to be) working on. An asset appears on the participant's assignment list as soon as the asset enters a state for which the participant has a role to fulfill.

A typical workflow design generates an e-mail notification when you are given a workflow assignment. You can see an updated list of your assignments at any time by selecting the **My Assignments** tag in the **Tags** tree.

Assignment Duration

Each workflow state has an associated estimated time to completion (deadline) for an assignment. If the administrator has granted you the appropriate permission, you can override the default estimate for the next assignment.

As the assignment deadline nears, associated assignment actions in the form of e-mail notifications can be triggered as timed events relative to the estimated time to completion. For example:

- You receive a reminder the day before your assignment is due.
- You and the workflow initiator receive a warning the day the assignment is due.
- The initiator receives notification the day after the due date that the assignment has not been completed.

Voting Your Assignments

If you participate in workflow, you have a vote. **Voting** means taking a workflow step that moves the asset from its current state to the next, after you have completed the task required by the current workflow state (such as editing an article) and committed the changes to the CS database (saved the asset), if applicable. You cast your vote by using the **Finish Assignment** function (available in the action bar of the "Inspect" form when the **Workflow** section is selected). If more than one participant with a given role has the assignment, either one, or all of them must vote before the asset moves to the next state, depending on how the workflow was set up by the administrator.

Depending on your role in the workflow process, the **Finish Assignment** function can give you a choice of steps to take; for example, if you are an approver and your current assignment is to either approve an asset for publishing or reject it, you can use the **Finish Assignment** function to invoke either a step that approves the asset for publishing, or a step that rejects it due to factual error, depending on your choice. When you vote, the asset moves to the next workflow state unless the step you chose is in disagreement with the step chosen by other assignees with the same role as you.

If, for some reason, you are unable to complete your assignment, you can **abstain from voting**, as long as yours is not the last (or only) vote for that particular role and/or step. When you abstain, you still have the assignment, but the asset can continue through workflow. If you change your mind, you can reverse your abstention by voting again (using the **Finish Assignment** function), as long as the asset has not already moved to the next state.

Delegating Your Assignments

Another way of handling an assignment is to **delegate** it to another participant holding the same role as you, assuming the asset you are delegating is not already assigned to that person for the current workflow state.

Your function privileges (set by the administrator) determine whether you can delegate your assignments. Also, the administrator can delegate assignments on your and other assignees' behalf, if necessary.

Delegating an assignment can trigger associated **delegate actions** in the form of e-mail notifications. For example:

- The recipient of the new assignment is notified.
- The workflow administrator is notified of the assignment delegation.

Deadlocks

An asset moves from one state to the next when assignees cast their votes (that is, take a step) using the **Finish Assignment** function. When defining the workflow process, the administrator decides whether each step is **all-voting**, that is, whether all assignees must vote (take the step) for the asset to move to the next state. By default, steps are not all-voting, which means that the first assignee to vote in a given workflow state determines the flow of the asset, and the assignments for the remaining assignees for that workflow state are cancelled. If the administrator set the step to be all-voting, the asset is held in its current workflow state until all assignees have voted, at which time the asset moves to the next state.

If there is a choice of steps and each step is all-voting, the potential for a deadlock exists. A deadlock occurs when all of the assignees must vote, and the voting is not unanimous on which step to take. A workflow process typically includes a **deadlock action** to generate e-mail notifications to all assignees, showing the vote tally and advising all assignees to vote again in favor of the majority. Deadlocks cause additional work for all the users involved, and should be avoided whenever possible. They should also be resolved as quickly as possible so that the flow of work is not hindered.

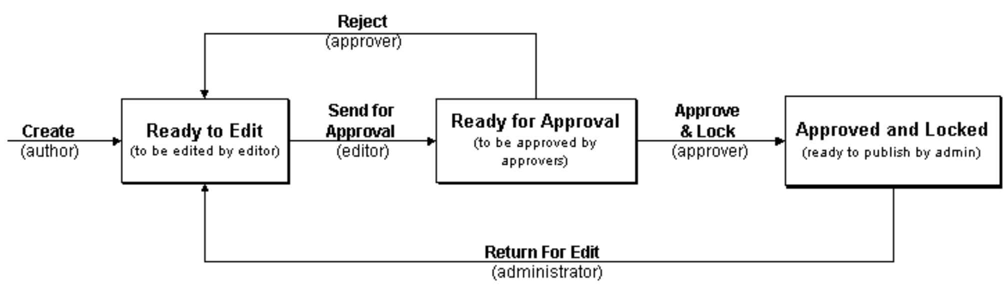
Sample Workflow

The FirstSite II sample site includes six sample workflow processes which guide assets of different types from creation to approval for publishing. The sample workflows are simple, transitioning through three states via five possible steps, but they serve to illustrate how a workflow process works. This section is based on the FSII: Approval for Content sample workflow process included in the FirstSite II sample site.

The FSII: Approval for Content sample workflow process has the following roles participating: author, editor, approver, and administrator. Each role has only a single participant (your organization will most likely have more complex processes, with several users participating in each role). A participant from any of the roles can create a new "Content" asset, which automatically assigns it to the FSII: Approval for Content workflow. By creating the asset, workflow is initiated. The asset then moves from author to editor to approver. The approver can either approve or reject the asset. If the approver rejects the asset, it goes back to the editor. The administrator can perform the functions of author, editor, and approver at any point in the workflow, as well as return an already approved asset back to the editor for additional changes.

Sample Workflow States and Steps

The FirstSite II sample site includes a sample workflow process called FSII: Approval for Content. The flow of the process is shown in the following diagram:



The steps and states from this workflow process are described in the following table:

Table 3: States and Steps

Asset in State...	Step	Description	Asset Moves to State...
none	Create	A user with the ContentAuthor role creates a "Content" asset, which automatically assigns it to the FSII: Approval for Content workflow.	Ready to Edit
Ready to Edit	Send for Approval	A user with the ContentEditor role receives e-mail notification of the assignment. The editor revises the asset to complete the assignment.	Ready for Approval

Table 3: States and Steps *(continued)*

Asset in State...	Step	Description	Asset Moves to State...
Ready for Approval	Reject	A user with the Approver role receives an e-mail notification of the assignment. The approver completes the assignment by rejecting the asset because of factual errors. The rejection triggers a notice to the editor, who must make some corrections and resubmit the asset for approval.	Ready to Edit
	Approve and Lock	The approver completes the assignments by approving the asset. The asset is flagged in the CS database as "ready to publish" for selected destinations.	Approved and Locked
Approved and Locked	Return for Edit	The workflow administrator (holding the Workflow Admin role) reviews the asset and determines the content needs to be updated with additional information. The workflow administrator then uses the **Finish Assignment** function to return the asset to the editor for revision.	Ready to Edit

Sample Workflow Scenario

This section describes the typical flow of a "Content" asset through the FSII: Approval for Content workflow process.

1. The author creates the asset and writes the content

The process starts when Conrad the author creates the "Content" asset. Since the "Content" asset type in the FirstSite II sample site is configured to automatically place each new "Content" asset in workflow, Conrad's asset is automatically placed into the FSII: Approval for Content workflow process. Conrad writes the content and saves the "Content" asset.

When Conrad saves the asset, the workflow process automatically changes the state of the asset to "Ready to Edit," assigns it to Connie the editor, and sends Connie an e-mail notice about the new assignment.

2. The editor edits the asset and sends it for approval

Connie the editor logs in, checks her assignment list, and opens the "Content" asset for editing. She reads the content and fixes some punctuation. When done, Connie saves her changes and uses the **Finish Assignment** function to send the asset on for approval.

The workflow process changes the state of the asset to “Ready for Approval,” assigns it to Napoleon the approver, and sends Napoleon an e-mail notice about his new assignment.

3. The approver approves the asset

Napoleon the approver is already logged in, so when he receives his e-mail, he runs the **My Assignments** tag to display his assignment list. Napoleon opens the newly assigned “Content” asset and examines it. It looks fine, so he uses the **Finish Assignment** function. Because Napoleon can either approve or reject the asset, the workflow process presents both options to him.

> **Note**
>
> If two or more users with the same role have the same assignment in a given workflow state, the first vote cast determines the next state for the asset.
>
> For example, if the FSII: Approval for Content workflow process included two approver users who both had a vote when approving the asset for publishing, a rejection by either of them would cancel the assignment of the other person and return the asset to the editor.
>
> Your administrator might set up a workflow in which a disagreement like this causes a deadlock (see “Deadlocks,” on page 221) that has to be resolved before the asset is returned to the previous state or moved to the next one.

The workflow process changes the state of the asset to “Approved and Locked,” and flags it in the database as “ready to publish.” The asset will be published to the online site during the next publishing session.

4. The workflow administrator returns the asset to the editor

When new information becomes available, it has to be added to the asset. When that happens, the workflow administrator uses the **Finish Assignment** function to return the asset to Connie for review and updating.

The workflow process automatically changes the state of the asset to “Ready to Edit,” assigns it to Connie the editor, and sends Connie an e-mail notice about the new assignment.

When Connie finishes her assignment, the updated asset will need to be re-approved before it can be re-published to the online site.

Managing Your Workload

When completing your workflow assignments, you can use the following functionality to manage your workload:

- Viewing Your Assignments – see a list of your current assignments and their status
- Using Workflow Functions – see a list of the assignments you have given to other users, and the status of those assignments

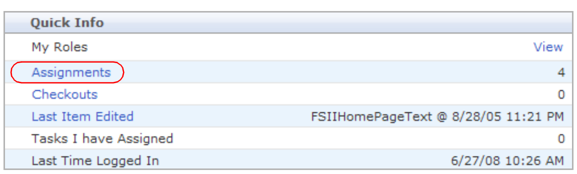
Viewing Your Assignments

You can access your assignment list by running the **My Assignments** tag, or using the "Quick Info" pane.

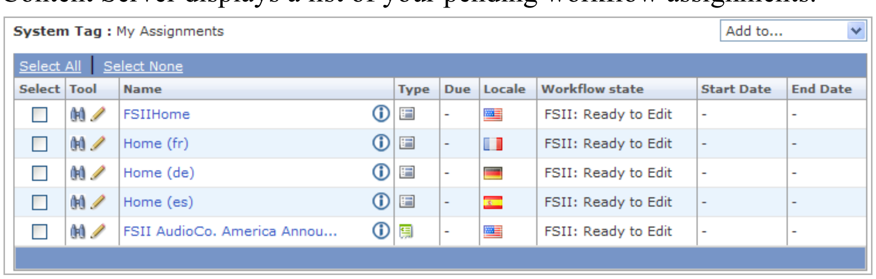
> **Note**
>
> As you work in the interface, new assignments might be given to you, and you may complete some of your current assignments, causing your assignment list to change. Check your assignment list periodically to make sure you stay up to date with your assignments.

To view a list of your workflow assignments

1. Log in to the site you want to work with.
2. Do one of the following:
   - In the **Tags** tree, click **My Assignments**. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)
   - If the "Quick Info" pane is displayed, click **Assignments**.



Content Server displays a list of your pending workflow assignments.



The description, asset type, and locale are represented by icons. Hold your cursor over the **Info** (i) icon to see a tool tip with the asset description, over a **Flag** icon to view the locale, and over any of the various icons in the type column to display the asset's type.

3. Click an asset's name to open it in the "Inspect" form, or use the "Edit" (pencil) and "Preview" (binoculars) icons to access their respective screens.

Using Workflow Functions

The following subsections describe the workflow functions you use in the Dash interface. These functions are available in the action bar of the “Inspect” form when you select the **Workflow** section of the form. Depending on your function privileges, not all of the described functions might be available to you.

This section describes the following topics:

- Assigning an Asset to a Workflow
- Setting a Process Deadline
- Setting an Assignment Deadline
- Finishing Your Assignments
- Delegating Your Assignments
- Abstaining from Voting
- Resolving Deadlocks
- Removing an Asset from Workflow
- Viewing an Asset's Participant (Assignee) List
- Setting Workflow Participants
- Examining the Workflow Progress of an Asset

Assigning an Asset to a Workflow

An asset can be assigned to a workflow either automatically or manually.

Automatic workflow assignment is set up by the administrator for selected asset types. When you create a new asset of such type, the asset is automatically placed in the workflow process assigned to that asset type. Consult your administrator to find out which asset types are set up for automatic workflow assignment.

Manual workflow assignment is available to users with appropriate permissions, assuming a workflow process is assigned to the selected asset type.

To manually assign an asset to a workflow

> **Note**
>
> Before an asset can be assigned to a workflow, the administrator must first assign one or more workflow processes to the asset type of the asset in question; otherwise, the option to assign the asset to a workflow is not available. Consult your administrator to find out which workflow processes are available to which asset types on your system.

1. Log in to the site you want to work with.
2. Find and open the asset you want to place in workflow:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.

- If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

For more information on searching, see "Finding Assets," on page 102.

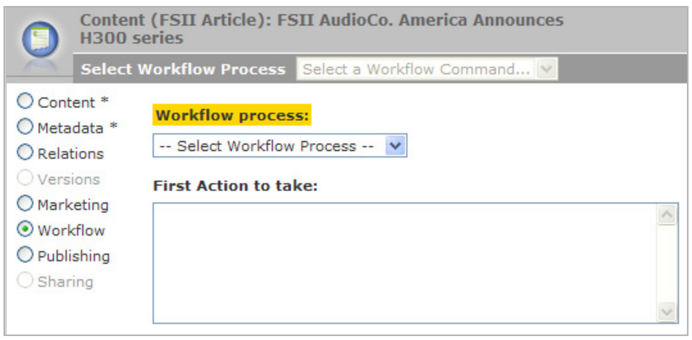
b. In the search results list, navigate to the desired asset and click its name.

Content Server displays the asset in the "Inspect" form.

3. Click **Workflow** in the section selector.

4. In the action bar, choose **Select Workflow** from the "Select a Workflow Command..." drop-down list.

Content Server displays the "Select Workflow Process" form:

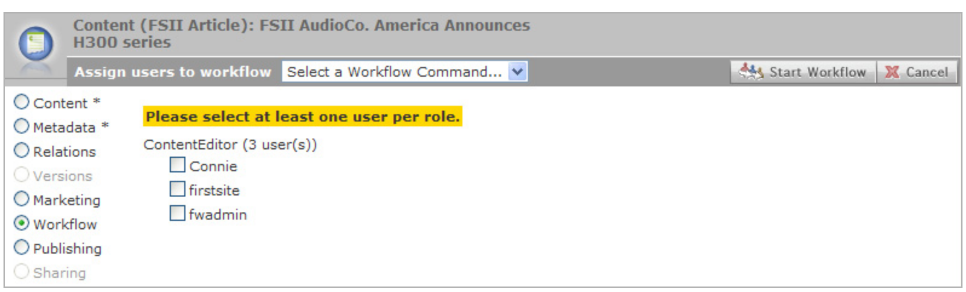


5. Select a workflow process from the "Workflow Process" drop-down list.

6. (Optional) In the **First Action to Take** field, enter brief instructions for the person receiving the assignment.

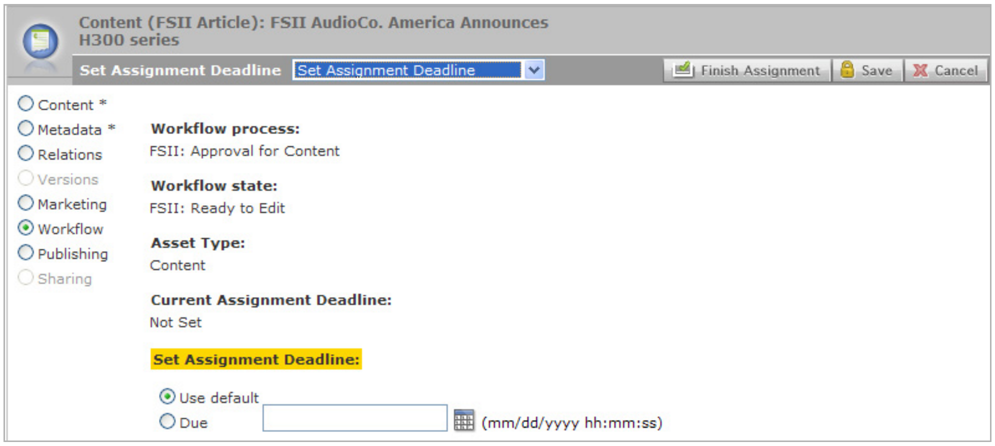
7. Click **Next**.

8. (Optional) If the administrator enabled the selection of assignees for this assignment, Content Server displays the "Assign Users to Workflow" screen:



In such case, select at least one user for each role, then click **Start Workflow**.

Content Server displays the asset's workflow summary, showing the new workflow assignment in the "Status" list.



At this point, the asset is in workflow; participants with roles required by the next state typically receive e-mail notifications of their assignments.

Setting a Process Deadline

A process deadline is the overall time allotted for an asset to pass through a workflow process. By default, no process deadline is set. This deadline is independent of the assignment deadline described later in this section; that is, the total of the individual assignment deadlines does not necessarily add up to a process deadline.

> **Note**
>
> Deadlines are informational only — the system does not impose any sort of penalty or issue error messages when a deadline is exceeded.

Before you can set a process deadline, the workflow administrator must first have done the following:

- Allowed a process deadline to be set for this workflow process.
- Assigned you a workflow administrator role for the workflow process, or otherwise provided you with the right function privileges.

The option to set a process deadline is available only if both of the above conditions are met. Contact your administrator to find out if you have the appropriate privileges and whether setting a process deadline is enabled for the workflow process in question.

To set a process deadline

1. Log in to the site you want to work with.
2. Find and open the asset for which you want to set a process deadline:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.

- If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

For more information on searching, see "Finding Assets," on page 102.

b. In the search results list, navigate to the desired asset and click its name.

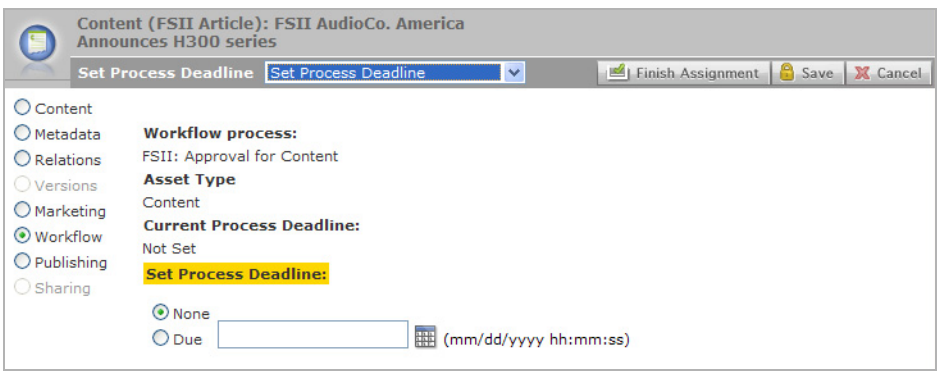
Content Server displays the asset in the "Inspect" form.

3. Click **Workflow** in the section selector.
4. In the action bar, choose **Set Process Deadline** from the "Select a Workflow Command..." drop-down list.

Note

If you do not see the **Set Process Deadline** function in the drop-down list, stop here. The function was not enabled by the administrator or you do not have the right permissions to access it.

Content Server displays the "Set Process Deadline" form:



5. Select the **Due** radio button and select a date using the date picker.

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**.

Content Server redisplays the asset's workflow summary.

Setting an Assignment Deadline

An assignment deadline is the time allotted to the assignee to complete an assignment as an asset advances through workflow. This deadline is independent of the process deadline described earlier in this section; that is, the total of the individual assignment deadlines does not necessarily add up to a process deadline.

> **Note**
>
> Deadlines are informational only — the system does not impose any sort of penalty or issue error messages when a deadline is exceeded.

Before you can set an assignment deadline, the workflow administrator must first have done the following:

- Allowed an assignment deadline to be set for this workflow state.
- Assigned you a workflow administrator role for the workflow process, or otherwise provided you with the right function privileges.

The option to set the assignment deadline is available only if both of these conditions are met. Contact your administrator to find out if you have the appropriate privileges and whether an assignment deadline is allowed for the workflow state in question.

To set an assignment deadline

> **Note**
>
> This procedure describes how to set an assignment deadline from an asset's "Inspect" form. You can also set an assignment deadline when you complete an assignment for an asset. In such case, the "Finish My Assignment" form will include a **Set Assignment Deadline** field.

1. Log in to the site you want to work with.
2. Find and open the asset for which you want to set an assignment deadline:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on searching, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

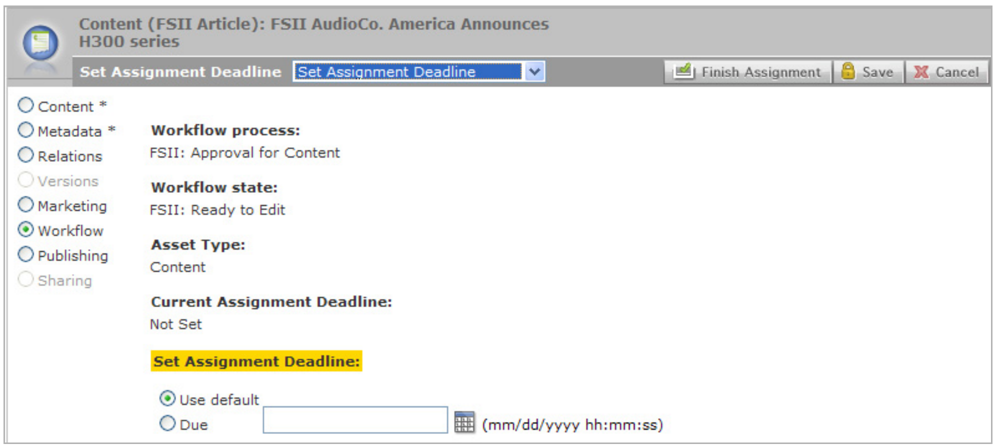
      Content Server displays the asset in the "Inspect" form.
3. Click **Workflow** in the section selector.

4. In the action bar, choose **Set Assignment Deadline** from the “Select a Workflow Command...” drop-down list.

Note

If you do not see the **Set Assignment Deadline** function in the drop-down list, stop here. The function was not enabled by the administrator or you do not have the right permissions to access it.

Content Server displays the “Set Assignment Deadline” form:



5. Enter a date using the date picker. The default assignment deadline is set by the administrator in the workflow state definition. For example, in the FSII: Approval for Content sample workflow, each state has a duration of one year from the current date and time.
6. Click **Save**.

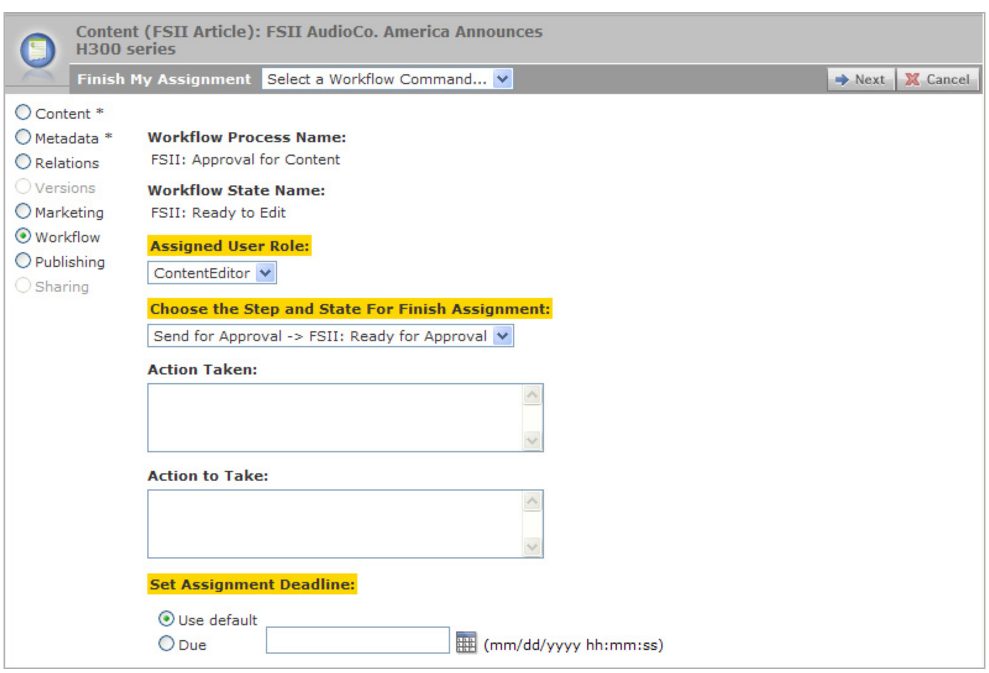
   Content Server redisplays the asset’s workflow summary.

Finishing Your Assignments

After you complete your work for an assignment, you need to notify the system that you are finished so the asset can continue to move through the workflow.

To finish your assignment for an asset

1. Log in to the site you want to work with.
2. Open the asset in the "Inspect" form by doing one of the following:
   - **If you are currently working on the asset in the "Edit" form:**
     a. Review your work and click **Save & Close** to save the asset.
        Content Server displays the asset in the "Inspect" form.
     b. Proceed to step 3 of this procedure.
   - **If you have already completed your work and saved the asset:**
     a. In the **Tags** tree, select **My Assignments**. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)
        Content Server displays a list of assets currently assigned to you to work on.
     b. Navigate to the desired asset and click its name.
        Content Server displays the asset in the "Inspect" form.
     c. Proceed to step 3 of this procedure.
3. Click **Workflow** in the section selector.
4. In the action bar, click **Finish Assignment**.
   Content Server displays the "Finish My Assignment" form:



5. Complete the form as follows:

> **Note**
>
> You can cancel this procedure at any time by clicking **Cancel** in the action bar.

a. (Optional) If you hold multiple participant roles in the workflow process, select the role for which you are finishing this assignment.

b. Select the next step for the asset.

c. (Optional) In the **Action Taken** field, enter a short description of the work you completed on the asset.

d. (Optional) In the **Action to Take** field, enter a short suggestion for the next person who will work with the asset.

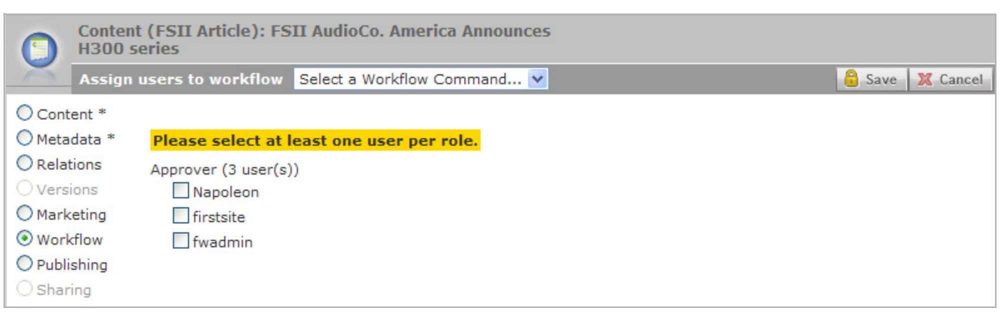
e. (Optional) If setting the assignment deadline is enabled for the next step you chose to take, the **Set Assignment Deadline** field appears in the "Finish Assignment..." form.

If you want to override the time allotted for the next assignment, use the **Set Assignment Deadline** field to enter a date in the prescribed format. If you do not enter a specific date, the assignment is due within the time determined by the next workflow state.

> **Note**
>
> This feature appears only if enabled by the workflow administrator.
>
> To set the assignment deadline, you must hold an administrative role in the workflow process or otherwise have the right privileges. For more information, see "Setting an Assignment Deadline," on page 230.

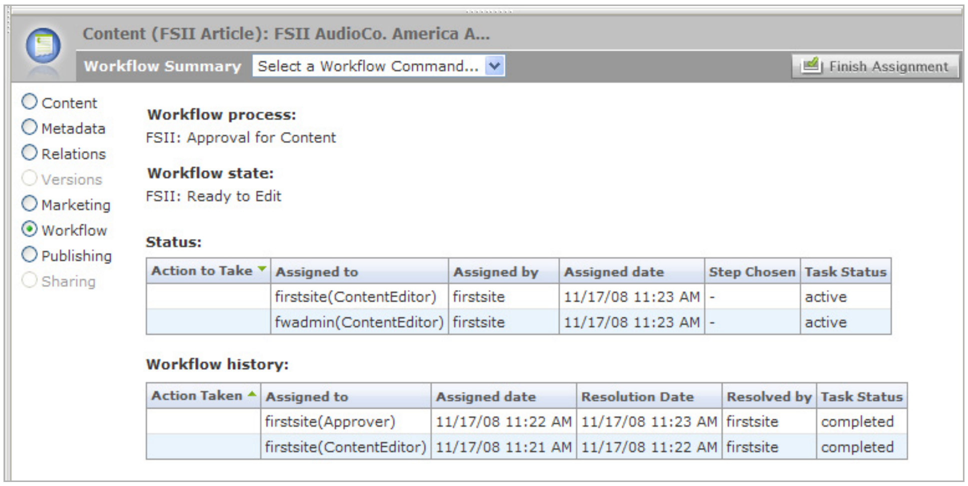
6. Click **Save**.

7. (Optional) If the administrator has set up the workflow process in a way that requires you to choose assignees for the next step when you finish your assignment, Content Server displays the "Assign Users to Workflow" form:



In such case, select at least one user for each displayed role, then click **Save**.

Content Server redisplays the asset's workflow summary, showing the changes. The action taken is visible in the "Workflow History" list. The action to take is visible in the "Status" field.



What happens after you complete your assignment depends on the way the administrator set up the next workflow step. There are five possible options:

- **Assign From a List of Participants** — when you (or another user with the appropriate privileges) assign an asset to a workflow, you have the option to decide which participants in each role get the assignment when the asset enters a workflow state requiring those roles. This is the default mechanism for moving an asset through a workflow.
- **Choose Assignees When Step is Taken** — this option, described in step 7, is similar to the "Assign From a List of Participants" option described earlier, but instead of predetermining at the beginning of the workflow who will get the assignment during which workflow state(s), you choose assignees for the next workflow state in real-time each time you take a step.
- **Retain "From" State Assignees** — you keep the assignment as the asset moves to the next state; this allows you to continue working on the asset in that state. You probably know why it is appropriate for you to keep the assignment, but if you do not, ask your CS or workflow administrator.
- **Assign To Everyone —** the asset is assigned to all users holding roles participating in the current workflow process.
- **No Assignments —** as the asset moves to the next state, it remains in the workflow so that function privileges defined for the workflow process are enforced. However, the asset is assigned to no one and participant roles alone (through their assigned function privileges) determine who can work on the asset, and how.

Delegating Your Assignments

As you review your assignment list, you might find that you will be unable to complete certain assignments. For example, you might notice that an assignment's due date falls during your scheduled vacation time. In such situations, you can delegate your assignment to another user who has the same role as you, assuming that the user does not already have an identical assignment for the asset; that is, if both you and another user have the Editor role, you cannot delegate the asset to the other user if he/she already has the asset assigned through the Editor role. (The asset can still be assigned to the user through a different role or another workflow process.)

To delegate an assignment

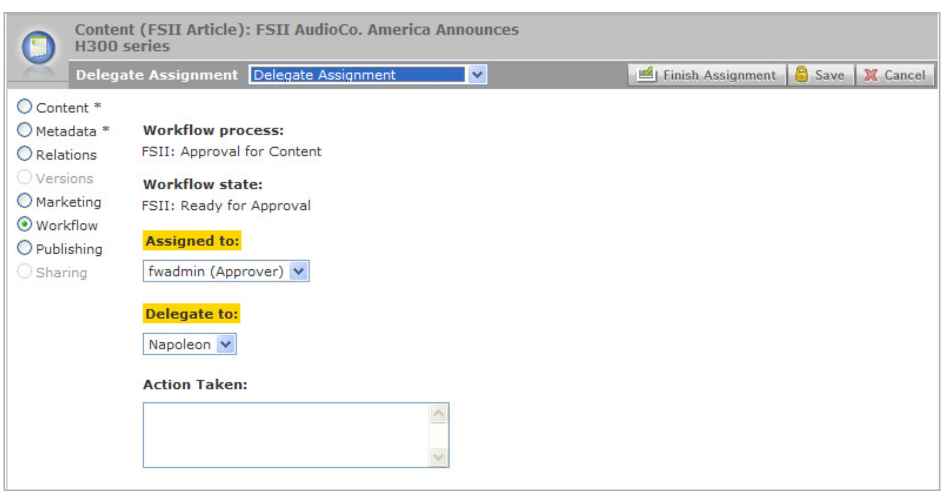
1. Log in to the site you want to work with.
2. Find and open the asset for which you want to delegate your assignment:
   a. (Optional) If the **Tags** tree in the navigation pane is collapsed, click the **Tags** bar to expand it.
   b. In the **Tags** tree, click **My Assignments**.

      Content Server displays a list of assets assigned to you to work on.
   c. Navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Select **Workflow** in the section selector.
4. In the action bar, select **Delegate Assignment** from the "Select a Workflow Command..." drop-down list.

> **Note**
>
> If you do not see the **Delegate Assignment** function in the drop-down list, stop here. You do not have the right permissions to access the function or there are no other users in your role to whom you can delegate your assignment.

Content Server displays the "Delegate Assignment" screen.



5. (Optional) If you hold multiple participant roles in the workflow process, use the “Assigned to” drop-down list to select the role for which you are delegating this assignment.
6. Select the user to whom you want to delegate the assignment. Optionally, enter a comment about your action.
7. Click **Save**.

   Content Server displays the asset’s workflow summary. The delegation is denoted in the “Workflow History” list, and the new assignee is displayed in the “Status” field. This action also triggers a notification e-mail to the new assignee, assuming your site is configured to do so.

Abstaining from Voting

Sometimes, you are unable to deal with a particular assignment: your workload is too heavy, or perhaps you have been miscast in your role. In such situations, you can abstain from voting (that is, waive your participation), as long as yours is not the last (or only) vote for that particular role and/or step. When you abstain, you still have the assignment, but the asset can continue through workflow.

Note

If you do not see the **Abstain From Voting** function in the drop-down list, stop here. You do not have the right permissions to access it or you are the only (or the only remaining) participant in your current role. In this case, you must find some other means of dealing with your assignment.

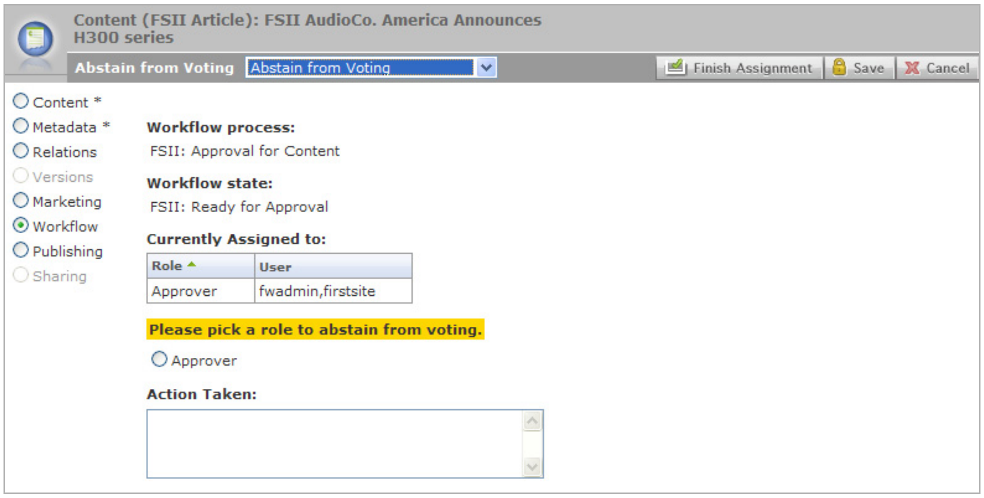
To abstain from voting on an assignment

1. Log in to the site you want to work with.
2. Find and open the asset for which you want to abstain from voting:
   a. (Optional) If the **Tags** tree in the navigation pane is collapsed, click the **Tags** bar to expand it.
   b. In the **Tags** tree, click **My Assignments**.

      Content Server displays a list of assets assigned to you to work on.
   c. Navigate to the desired asset and click its name.

      Content Server displays the asset in the “Inspect” form.
3. Select **Workflow** in the section selector.
4. In the action bar, select **Abstain From Voting** from the “Select a Workflow Command...” drop-down list.

Content Server displays the "Abstain From Voting" form:



5. (Optional) If you hold multiple participant roles in the workflow process, select the role for which you are abstaining from voting on this assignment.
6. Enter a brief explanation for your abstention and click **Save**.

   Content Server displays the asset's workflow summary. The abstention is denoted in the "Workflow History" list. Keep in mind that abstaining does not cancel your assignment.

Resolving Deadlocks

A deadlock can occur when there is a choice of steps to move the asset to the next state, and each step requires all assignees to vote. If the vote is not unanimous in favor of a single step, there is a deadlock.

Frequently, resolving deadlocks involves offline communication and negotiation among assignees to achieve consensus; as such, deadlocks cause additional work for everyone involved and should be avoided whenever possible. If a deadlock occurs, it should be resolved as quickly as possible so that the flow of work suffers minimal delay.

To resolve a deadlock, certain participants must change their votes to achieve unanimity. If you receive an e-mail notification that your vote is the one causing the deadlock, you must vote again to break the deadlock.

To resolve a deadlock, do one of the following:

- Use the **Finish Assignment** function to vote again on your assignment.
- In some cases, you can also resolve the deadlock by changing your vote to an abstention, which clears the way for the asset to move to the next workflow state (see "Abstaining from Voting," on page 236).

Removing an Asset from Workflow

You can remove an asset from workflow assuming you have the permissions to do so. When you remove an asset from workflow, all assignments for the asset are cancelled.

To remove an asset from workflow

1. Log in to the site you want to work with.
2. Find the asset you want to remove from workflow:
   - If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

     Content Server displays a list of assets currently assigned to you to work on.
   - If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Search**.

     Content Server displays a list of assets matching the criteria you specified.

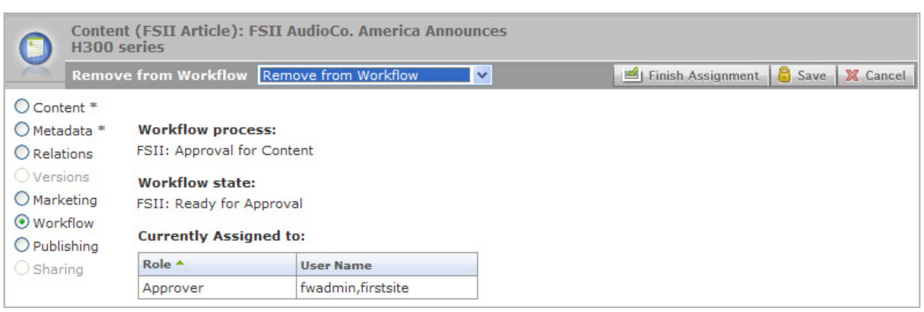
     For more information on searching, see "Finding Assets," on page 102.
3. In the list of assets, navigate to the desired asset and click its name.

   Content Server displays the asset in the "Inspect" form.
4. Click **Workflow** in the section selector.
5. In the action bar, choose **Remove from Workflow** from the "Select a Workflow Command..." drop-down list.

   Note

   If you do not see the **Remove from Workflow** function in the drop-down list, stop here. You do not have the right permissions to access the function. Contact your CS administrator if you have questions about your permissions.

   Content Server displays the "Remove from Workflow" form:



6. Do one of the following:
   - If you are sure you want to remove the asset from workflow, click **Save**. (Otherwise, click **Cancel**.)

     Content Server redisplays the asset's workflow summary, denoting the removal. All assignments for the asset are automatically cancelled.
   - If you want to finish the assignment, click **Finish Assignment**.

     The Finish My Assignment screen displays. Go to "Finishing Your Assignments," on page 232 for information on completing these attributes.

Viewing an Asset's Participant (Assignee) List

To examine an asset's participant (assignee) list

1. Log in to the site you want to work with.
2. Find the asset whose participant list you want to view:
   - If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

     Content Server displays a list of assets currently assigned to you to work on.
   - If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Search**.

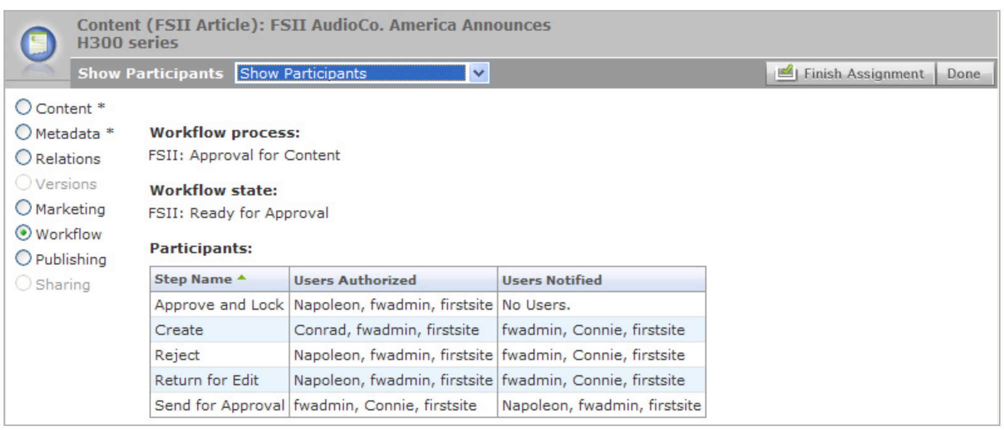
     Content Server displays a list of assets matching the criteria you specified.

     For more information on searching, see "Finding Assets," on page 102.
3. In the list of assets, navigate to the desired asset and click its name.

   Content Server displays the asset in the "Inspect" form.
4. Select **Workflow** in the section selector.
5. In the action bar, select **Show Participants** from the "Select a Workflow Command..." drop-down list.

> **Note**
>
> If you do not see the **Show Participants** function in the drop-down list, stop here. The administrator has not enabled the function or you do not have the right permissions to access it.

Content Server displays the "Show Participants" summary for the asset:



For each step in the workflow process, the "Show Participants" summary displays the following:

- Users authorized – users authorized to take the next step using the **Finish Assignment** function when they hold the assignment for the asset.
- Users notified – users who will get the next assignment for the asset.

6. When you are finished viewing the list, click **Done** in the action bar to return to the asset's workflow summary.

Setting Workflow Participants

Once you have placed an asset in a workflow and chosen the assignees for each role in the workflow process, you might find that you forgot to include a certain user as an assignee for a particular role. Or perhaps you realized that you gave the assignment to a certain user by mistake. In such cases, you can modify the list of participants for an asset while the asset is in workflow.

To set workflow participants

1. Log in to the site you want to work with.
2. Find and open the asset for which you want to set participants:
   - If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

     Content Server displays a list of assets currently assigned to you to work on.
   - If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Search**.

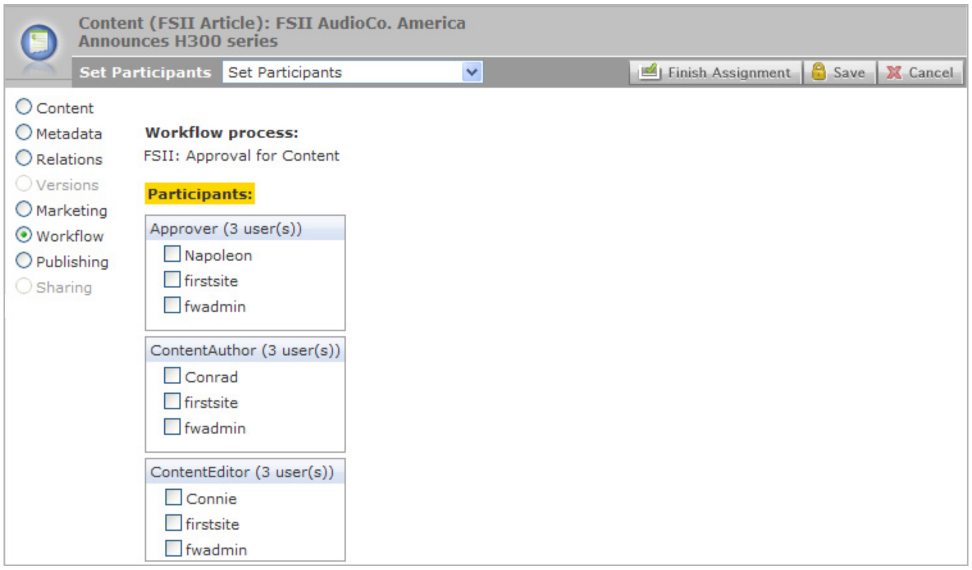
     Content Server displays a list of assets matching the criteria you specified.

     For more information on searching, see "Finding Assets," on page 102.
3. In the list of assets, navigate to the desired asset and click its name.

   Content Server displays the asset in the "Inspect" form.
4. Select **Workflow** in the section selector.
5. In the action bar, select **Set Participants** from the "Select a Workflow Command..." drop-down list.

> **Note**
>
> If you do not see the **Set Participants** function in the drop-down list, stop here. The administrator has not enabled the function or you do not have the right permissions to access it.

Content Server displays the “Set Participants” form:



Each participant you select in this form becomes an assignee in the respective role(s) for this asset.

6. Choose the desired assignees for this assignment by selecting the check boxes next to their user names in each of the role lists.

7. When you have selected the desired assignees, click **Save**.

Content Server displays the asset’s workflow summary, denoting the newly selected assignees.

> **Note**
>
> The participants list updates as you requested, but added users get the assignment only if the workflow state assigned to their role has not yet been reached.

Examining the Workflow Progress of an Asset

To examine the workflow progress of an asset

1. Log in to the site you want to work with.

2. Find and open the asset whose workflow progress you want to see:

- If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

  Content Server displays a list of assets currently assigned to you to work on.

- If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Search**.

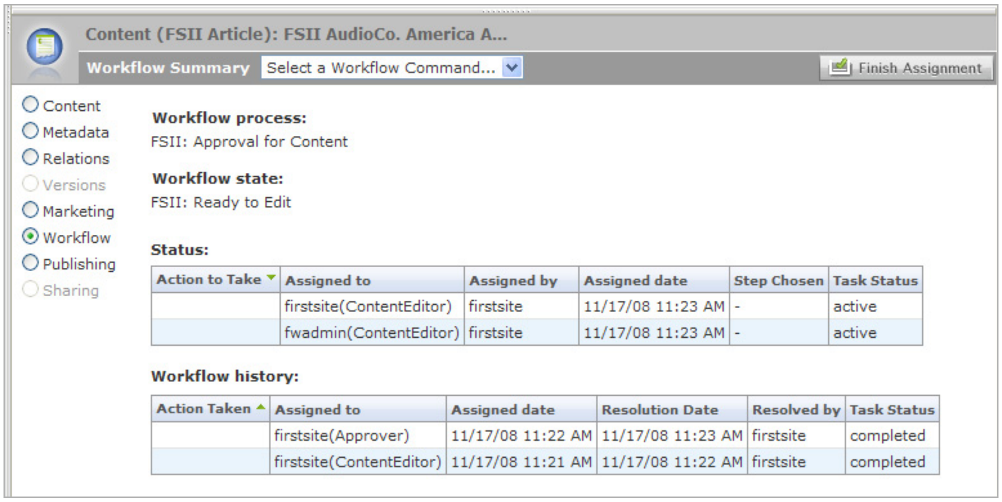
  Content Server displays a list of assets matching the criteria you specified.

  For more information on searching, see “Finding Assets,” on page 102.

3. In the list of assets, navigate to the desired asset and click its name.

Content Server displays the asset in the “Inspect” form.

4. Select **Workflow** in the section selector. Content Server displays the asset's workflow summary:



The workflow summary contains the following information:

- The **Workflow process** field indicates the workflow process which the asset is currently passing through.
- The **Workflow state** field indicates where the asset currently is in the workflow process.
- The "Status" list shows to whom the asset is currently assigned, and the status of each assignment. Each row in the list represents a single assignment. Items are ordered with the most recent assignment at the top of the list.
- The "Workflow history" list shows the assignments completed on the asset so far, and the result of each assignment. Each row in the list represents a single assignment. Items are ordered with the most recently completed assignment at the top of the list.

The following table defines all of the columns in the "Status" and "Workflow history" lists.

Table 4: Workflow summary list columns

Column	Definition
Assigned To	The user name(s) of the assignee(s) for each assignment. Note that the user's role appears in parentheses following the user name.
Assigned By	The user name of the assignee who finished working with the asset and assigned it to the next participant. In the "Workflow history" list, the very first entry in this column (at the bottom of the list) shows the user name of the person who assigned the asset to the workflow process.
Assigned Date	The date and time the asset was assigned to the user.

Table 4: Workflow summary list columns *(continued)*

Column	Definition
Action to Take	Instructions from the user who assigned the asset, assuming that person entered instructions in the “Finish Assignment” form when they finished their assignment (see page 232). The field is blank if no instructions were entered. If the text is longer than the width of the column, click the text to view its entirety.
Step Chosen	The step indicated by the user who completed the assignment, when there is a choice of next step in the “Finish Assignment” form.
	This warning icon appears next to the name of the chosen step in the “Step Chosen” column and denotes a deadlock condition for the workflow state. The deadlock icon appears next to each step involved in the deadlock.
Action Taken	Information about the work this user did with the asset (if information was entered on the form; appears blank otherwise). Click to view the full text, if incomplete in this view.
Resolved By	The person whose action moved the asset to the next state.
Resolution Date	The date and time the action was taken to move the asset to the next state.
Task Status	The status of the assignment. Possible values are as follows: • Abstain - the assignee has abstained from voting. • Active - the asset is currently assigned to someone. • Cancelled - the first vote moved the asset to the next state, so the assignment has been canceled for the other assignees, or the asset has been removed from workflow. • Completed - the assignee has completed the step. • Delegated - the assignment has been delegated to another user in the same role. • Queued - the asset has multiple assignees for the current state, the next step is all-voting, and not everyone has voted yet. (Also appears if the asset is deadlocked.)

Chapter 13

Revision Tracking

Revision tracking is a configurable feature and must be enabled by the CS administrator for the asset types on your sites. Revision tracking allows you to track and control the changes made to your assets.

With revision tracking, you can:

- Enforce that only one person at a time can edit or delete an asset.
- Keep track of past versions of an asset and who created them.
- Restore (roll back) an asset to a previous version.

This chapter describes revision tracking and the procedures used to track assets.

It contains the following sections:

Note

In the FirstSite II sample site, revision tracking is not enabled by default.

Contact your administrator if you have any questions or concerns about revision tracking as it applies to you.

Overview

Revision tracking allows you to check out, or lock, assets. When you check out an asset, no one else can edit or delete it. When you are finished working with the asset, you check it back in. The asset is then again available for modification by other users. An asset that is checked out to you, however, can still be viewed and searched for by other users, as well as retrieved by queries or collections.

When revision tracking is enabled, you control access to an asset by checking it out and back in. You can either check assets out and back in manually, or let Content Server handle the process automatically.

Manual Checkout and Checkin

When manual checkout is enabled, the following commands control access to assets:

- **Check out**. Only one user can check out an asset at any given time. If other users try to check the asset out or modify it, CS 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.
- **Undo Checkout**. If you check out an asset and then decide that you do not want to save the changes you have made to it, cancel or “undo” the checkout. In this case, the asset is simply unlocked and no new version is saved.
- **Check in**. You check in assets that you have checked out. After the asset is checked in, others can work with it, and if the asset is assigned to you in a workflow, you can finish your assignment.

  When you check in an asset that you have checked out, a record is made of the checkin, and a copy of the last saved version of the asset is preserved (the number of versions kept is set by the administrator).

  Another option is to check in the asset so that you have an archived version but to keep it checked out. This option enables you to store a version but keeps the asset available to you alone.

Automatic Checkout and Checkin

If you try to edit, delete, or assign a workflow process to an asset that is not already checked out, CS checks it out to you automatically. When you save the edited asset, CS checks it back in automatically and saves the new version. (When you manually check out an asset, edit it, and then save it, the new version is not saved until you manually check the asset back in.) Therefore, if the situation requires it, you can choose to bypass the step of manually checking out and checking in an asset and rely on the automatic revision tracking feature instead.

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. However, if you are making extensive revisions, you should not use automatic checkout for the following reasons:

- The volume of revisions to be saved may be limited (depending on your configuration)
- You could overwrite a version of the asset you might need later

When an asset is automatically checked out to you, CS saves an official, archived version of the asset each time you click **Save & Close**. Therefore, if you make several changes to an asset—saving and inspecting each change separately—CS checks in a version of the asset at each save. Depending on the number of versions CS is configured by the administrator to store, you might overwrite older versions that you wanted to keep with the automatically checked-in versions.

Releasing Locked Assets

Because automatic checkout is in effect when revision tracking is enabled, you might accidentally check out an asset while you work in Content Server's interface. This locks the asset and prevents other users from working with it. To make sure that you are not stopping other people from working with assets that you have inadvertently checked out, review the assets checked out to you by viewing your "My Checkouts" list and check in (or, if you do not want to commit your changes to the database, undo the checkout of) any assets that you do not need.

Functions That Use Automatic Checkout and Checkin

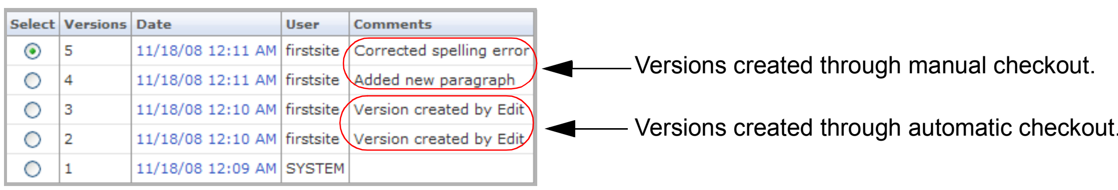
The following table describes asset management functions that check assets out or in automatically:

Command	Effect on Revision Control
Create	As soon as you open a "Create 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 other users from editing or deleting it.
Save & Close	Checks in the asset, but only if it was checked out automatically.
Copy	Checks out a new copy of the asset. The source asset is not checked out during the copy operation. The new copy behaves as if you created a new asset as described above in the "Create" function column. The only difference is that there is more data included in the copied version. The copied asset is displayed in an "Edit" form. When the asset is saved, a second version of the asset is created.
Delete	Checks out the asset. When the user confirms the deletion, CS checks the asset back in.
Rollback	Clicking **Rollback** checks out the asset, then immediately checks it back in.

Rollback and Revision History

When you check in an asset that you have checked out, CS stores a new version of the asset and adds it to a list of previous versions (assuming the administrator allowed the storage of multiple versions). You can later restore the asset to one of those previous versions and you can examine the asset's revision history.

- **Rollback** means restoring 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 the asset, but does not reset its 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. You can tell whether a version was created by an automatic or manual checkout by looking at the comment section of the revision history.



Select	Versions	Date	User	Comments
	5	11/18/08 12:11 AM	firstsite	Corrected spelling error
	4	11/18/08 12:11 AM	firstsite	Added new paragraph
	3	11/18/08 12:10 AM	firstsite	Version created by Edit
	2	11/18/08 12:10 AM	firstsite	Version created by Edit
	1	11/18/08 12:09 AM	SYSTEM	

Versions created through automatic checkout will be automatically commented by Content Server with "Version created by *function name*." Versions created through manual checkout will either have comments entered by the users who edited the asset at the time or have no comments at all if the user who edited the asset at the time chose not to enter any.

Checking Out Assets

This section shows you how to check out an asset.

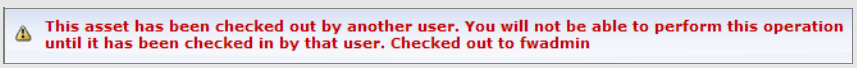
To check out an asset

1. Log in to the site you want to work with.
2. Find and open the asset you want to check out:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

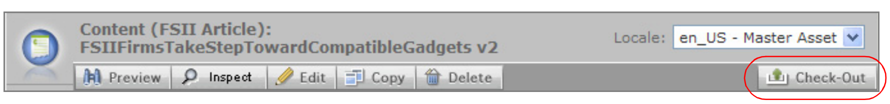
Note

If the asset is already checked out to another user, when you try to inspect or edit the asset, you will receive an error message like the one below:



Content Server displays the asset in the "Inspect" form.

3. In the action bar, click **Check Out**.



Note

If you do not see the **Check Out** button in the asset's "Inspect" form, revision tracking for that asset type is not enabled on your site.

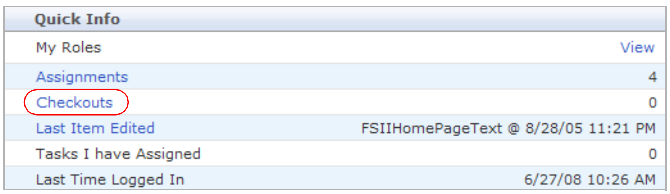
Content Server checks the asset out to you and displays a confirmation message in the action bar:

Examining Your Checkouts

To view a list of assets currently checked out to you, perform the following steps:

To view a list of assets currently checked out to you

1. Log in to the site you want to work with.
2. Do one of the following:
   - In the navigation pane, select **My Checkouts** from the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)
   - If the “Quick Info” pane is displayed, click **Checkouts**.



   Content Server displays a list of assets currently checked out to you.
3. (Optional) If you want to open an asset, click its name in the list.

   Content Server displays the asset in the “Inspect” form.

Undoing a Checkout

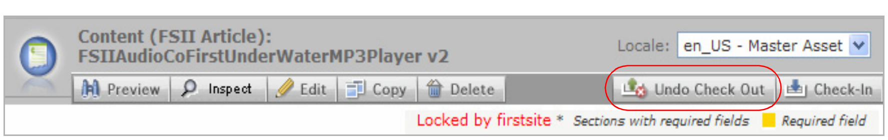
This section shows you how to undo the checkout of an asset.

To undo the checkout of an asset

1. Log in to the site you want to work with.
2. Find the asset for which you want to undo the checkout and open it:
   a. In the navigation pane, select **My Checkouts** from the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

      Content Server displays a list of assets presently checked out to you.
   b. In the list of assets, navigate to the desired asset and click its name.

      Content Server displays the asset in the “Inspect” form.
3. In the action bar, click **Undo Checkout**.



   Content Server undoes the checkout of the asset and redisplays the asset in the “Inspect” form.

Checking In Assets

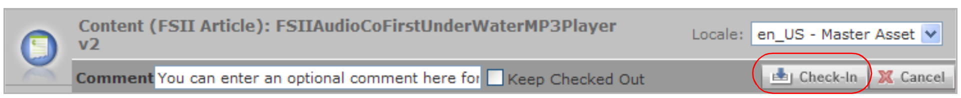
To check in an asset

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.
3. In the **Tags** tree, select **My Checkouts**.

   Content Server displays a list of assets presently checked out to you.
4. Click the name of the asset you want to check back in.

   Content Server displays the asset in the "Inspect" form.
5. In the action bar, click **Check In**.

   The action bar displays the following:

6. (Optional) In the **Comment** field, enter comments or instructions that pertain to the version that you are checking in. The comments you enter here are displayed in the asset's revision history.
7. (Optional) If you want to back up the asset but need to continue working on it, select the **Keep Checked Out** box.
8. Click **Check In**.

   Content Server checks the asset in to the database and redisplays the "Inspect" form.

Examining Revision History

To examine an asset's revision history

1. Log in to the site you want to work with.
2. Find the asset whose revision history you want to view and open it:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.

3. Switch to the **Versions** section of the form.

> **Note**
>
> If the **Versions** section in the section selector is unavailable (greyed out), stop here. Revision tracking is not enabled for the asset type, or you do not have the permissions to view the **Versions** section of the form. If you have questions about revision tracking or your permissions, contact your CS administrator.

Content Server displays the asset's revision history:

Select	Versions	Date	User	Comments
◉	5	11/18/08 12:11 AM	firstsite	Corrected spelling error
○	4	11/18/08 12:11 AM	firstsite	Added new paragraph
○	3	11/18/08 12:10 AM	firstsite	Version created by Edit
○	2	11/18/08 12:10 AM	firstsite	Version created by Edit
○	1	11/18/08 12:09 AM	SYSTEM	

Comparing Versions

To compare different versions of an asset

1. Log in to the site you want to work with.
2. Find the asset you want to roll back to a previous version and open it:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Switch to the **Versions** section of the form.

> **Note**
>
> If the **Versions** section in the section selector is unavailable (greyed out), stop here. Revision tracking is not enabled for the asset type, or you do not have the permissions to view the **Versions** section of the form. If you have questions about revision tracking or your permissions, contact your CS administrator.

4. Content Server displays the asset's revision history:

Select	Versions	Date	User	Comments
	5	11/18/08 12:11 AM	firstsite	Corrected spelling error
	4	11/18/08 12:11 AM	firstsite	Added new paragraph
	3	11/18/08 12:10 AM	firstsite	Version created by Edit
	2	11/18/08 12:10 AM	firstsite	Version created by Edit
	1	11/18/08 12:09 AM	SYSTEM	

5. Click the hyperlinked dates of the versions that you want to compare. Each version's inspect view opens in a separate window.
6. Arrange the windows so you can compare the different versions.

Reverting to a Previous Version (Rollback)

This section shows you how to roll an asset back to a previous version.

To roll back an asset

1. Log in to the site you want to work with.
2. Find the asset you want to roll back to a previous version and open it:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Search**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see "Finding Assets," on page 102.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Switch to the **Versions** section of the form.

> **Note**
>
> If the **Versions** section in the section selector is unavailable (greyed out), stop here. Revision tracking is not enabled for the asset type, or you do not have the permissions to view the **Versions** section of the form. If you have questions about revision tracking or your permissions, contact your CS administrator.

Content Server displays the asset's revision history:

Select	Versions	Date	User	Comments
◉	5	11/18/08 12:11 AM	firstsite	Corrected spelling error
○	4	11/18/08 12:11 AM	firstsite	Added new paragraph
○	3	11/18/08 12:10 AM	firstsite	Version created by Edit
○	2	11/18/08 12:10 AM	firstsite	Version created by Edit
○	1	11/18/08 12:09 AM	SYSTEM	

Note

If the asset is already checked out to another user, you cannot roll it back to a previous version. In such cases, Content Server displays a message informing you of this situation. To roll the asset back, wait until the user working on it finishes his/her work and checks the asset back in.

4. In the **Select** column, select the version of the asset you want to roll back to.
5. Click **Rollback**.

   Content Server rolls the asset back to the version you selected and redisplays the "Inspect" form.

Note

Note that rolling back an asset creates another version of it. Versions created by the rollback function are marked as such in the **Comments** column.

Appendices

This part contains the following appendix:

- Appendix A, “The Flex Asset Model”

Appendix A

The Flex Asset Model

As a content provider, you do not need to understand all of the details of the flex asset model. The purpose of this appendix is to help you develop a general understanding of this data model and how it relates to you as a content provider.

This appendix contains the following section:

- Overview of the Flex Asset Model

Overview of the Flex Asset Model

As mentioned in Chapter 1, “Overview,” Content Server developers use two asset data models to create asset types and define how asset data is stored in the Content Server database: the basic asset model and the flex asset model.

The flex asset model is more complex than the basic asset model. Unlike basic assets, where the information for one instance of an asset is stored in one row of a database table, the information for one instance of a flex asset is stored in multiple database tables.

Whereas basic asset types are standalone asset types, flex asset types are composed of families of asset types. The members of a flex family are:

- flex attribute type (required)
- flex asset type (required)
- flex definition (required)
- flex parent (required)
- flex parent definition (required)
- flex filter type (optional)

The members of a flex family form an asset inheritance tree, where child assets inherit various attributes from their parents.

As a content provider, you will not directly work with all of the members of the flex family. In fact, you will mainly be working with flex assets, which are the key members of flex families (all of the other members of a flex family contribute to the flex asset in some way). If you have the appropriate permissions, you may also be responsible for creating new flex attributes, which are characteristics of flex assets.

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