

Content Server

Version: 7.0

Advanced Interface User's Guide

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Content Server 7.0 Advanced Interface User's Guide

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About This Guide

This guide provides an overview of 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 Content Server's Advanced 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. They are as follows:

Part 1: Introduction

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

Part 2: Working in the Advanced Interface

This part describes how to use Content Server's Advanced interface. It explores the basics of the navigation and interaction with the Advanced 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: Using Engage

This part describes tasks and responsibilities performed by marketers who want to target site visitors for marketing campaigns, using Engage, an optional FatWire product, explaining segments, recommendations, and promotions.

Part 4: 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 Advanced interface running the Burlington Financial and FirstSite II sample sites. 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, and fields displayed in the interface, as well as any information you might be asked to enter verbatim into the 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 action or 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/CS>

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

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

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 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 Content Server efficiently to perform your content management tasks, without requiring technical proficiency.

This chapter contains the following sections:

- [Introduction to Content Server](#)
- [Exploring Content Management Concepts](#)
- [What Can You Do with Assets in the Advanced Interface?](#)
- [Permissions to Assets](#)
- [Dependencies](#)
- [Selecting Page Content](#)
- [Approving and Publishing Assets](#)
- [Users, Roles, and Workflow Assignments](#)
- [Revision Tracking](#)

Introduction to Content Server

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

The content that you manage with Content Server 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.

The content objects that you manage using Content Server are called **assets**. Articles, product descriptions, photos, video clips, and other content stored in the CS database are assets. An asset moves from its creation to your online site in steps, and the process by which assets move from person to person through those steps is called **workflow**. As the asset moves through its workflow, you can use revision tracking to audit the changes made to the asset along the way.

Your end goal is to **publish** your content so that your site visitors can view it. When content is published, it is copied to your delivery system and made available to the visitors of your online site.

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 database.

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 the visitors access. When the 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.

When you create and edit content in Content Server, you use content entry forms. Their purpose is to give you an easy and intuitive way to access and work with the CS database that stores the content. A content entry form is specifically related to the online site and the CS database, as illustrated 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 database (step 1 in [Figure 1](#)).
2. After you (or another user) approve the content for publishing, you or the CS administrator publishes the content to the delivery system, where it is stored in a duplicate database (step 2 in [Figure 1](#)).
3. Finally, when the content is requested by a site visitor for viewing, it is retrieved from the database, formatted, laid out, (step 3 in [Figure 1](#)) and delivered to the site visitor's browser by code (step 4 in [Figure 2](#)). (This code is created by site designers and/or developers.)

Figure 1: A content entry form

Article: NECUnveilsFirstMobilePhonewithHD

***Name:**

Description:

Template:

Status:

ID: 1098283740056

External Item ID:

Content Definition: [Article](#)

***Headline:**

Subheadline:

Byline:

***Abstract:**

***Body:**

Created: Oct 20, 2004 4:19:05 PM by admin

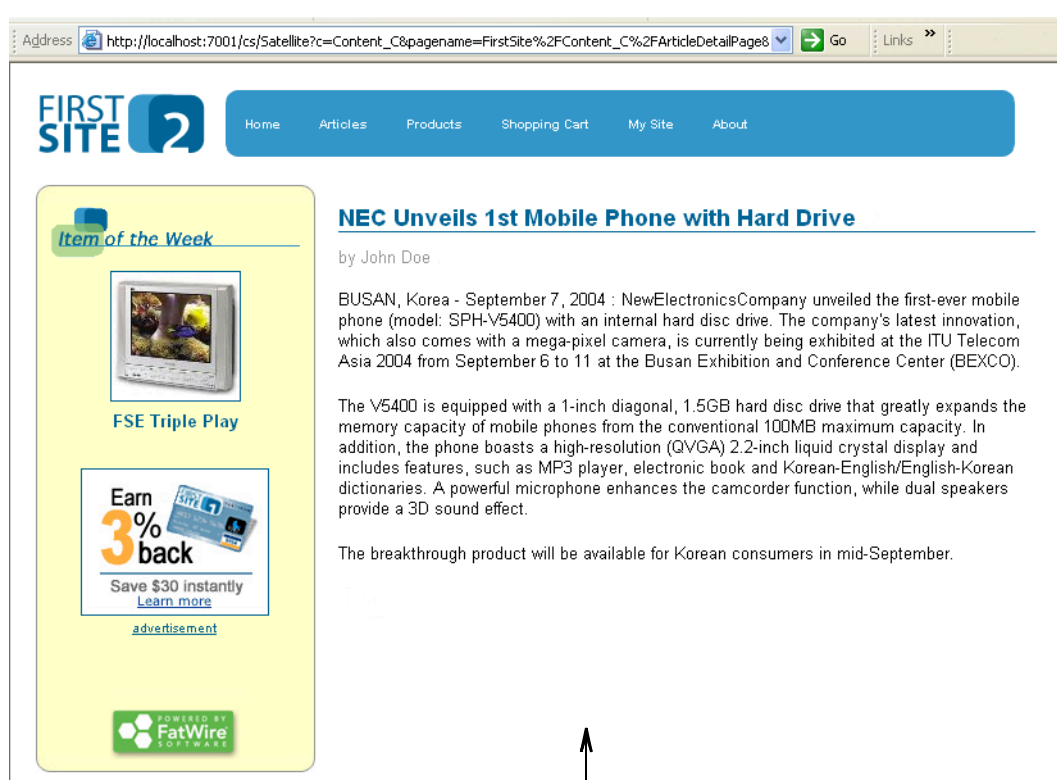
Modified: Nov 2, 2004 4:32:29 PM by firstsite

- Content entered into the content entry form is stored in the content management system's database.
- After approving the content for publishing, a content provider or administrator publishes the content to the delivery system database.
- When the content is ready for display on the online site, is retrieved from the database, formatted, and laid out by the code created by the site developers.

```

graph LR
    CM[Content Management System Database] --> DS[Delivery System Database]
    DS --> C[Code]
  
```

The diagram illustrates the content workflow. It starts with the 'Content Management System Database' (represented by a cylinder with a grid). An arrow points from this database to the 'Delivery System Database' (also a cylinder with a grid). From the 'Delivery System Database', an arrow points to a stack of documents labeled 'Code'. The steps are numbered 1, 2, and 3, corresponding to the text descriptions above the diagram.

Figure 2: The online site

- 4 Formatted content is displayed on the online site.

In simple terms, a content entry form accepts raw content for storage in the CS database. When the content is requested by a site visitor, the delivery system renders the content (unless it is already cached) and displays it 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. Formatting is accomplished by code, which is created by the site developers to meet the site designer's specifications. As a content provider, you remain strictly focused on the content you are providing and its quality.
- 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. Users always know what kind of content is expected from them.
- 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.

From Your Desk to the Online Site

The example procedure below will give you an idea of the general steps involved in creating and publishing content. The steps below are based on the following assumptions:

- You are logging in to the FirstSite II sample site as the **firstsite** user. This user has all the permissions necessary to complete the steps in this section.
- Your management and delivery systems are configured to publish content.

If you are not sure which sample sites and sample users are available on your system, or how your system is configured, contact your CS administrator.

To create and publish an asset

1. Log in to the FirstSite II sample site using the user name **firstsite** and password **firstsite**.
2. Create a new "Content" asset:
 - a. In the button bar, click **New**.
 - b. In the list of asset types, select **New Content**.
 - c. When prompted to select assignees, select the **firstsite** user and click **Set Assignees**.

- d. Populate all of the required fields (marked with a red asterisk) of the “New Content” form.
 - e. Select a parent for the asset:
 - 1) In the tree, select the **Content** tab.
 - 2) In the Content tab, Click **FSII Articles**.
 - 3) In the “New Content” form, click **Add Selected Items** in the **FSIICategory** field.
 - f. Click **Save**.
 3. Add the new asset to your Active List by clicking **Add to Active List** in the action bar.
 4. Assign the new asset to a page:
 - a. In the button bar, click **Search**.
 - b. In the list of asset types, select **Find Page**.
 - c. In the “Search for Pages” form, click **Search**.
 - d. In the list of search results, navigate to the **FSIIHome** page and click its **Edit** (pencil) icon.
 - e. In the tree, click the **Active List** tab.
 - f. In the **Active List** tab, select the asset you just created.
 - g. In the “Edit” form, scroll to the **Contains** field and click **Add Selected Items**.
 - h. Click **Save Changes**.
 5. Approve the page and all assets it references for publishing:
 - a. In the action bar, select **Approve for Publish** from the drop-down list.
 - b. Select the destination for which you want to approve the asset (**FSII Destination (dynamic)** in our example) and click **Approve**.
 - c. In the form listing the page’s dependents, click **Select All** and then click **Approve**. Repeat this process until all dependent assets have been approved.
 6. Publish the page and all assets it references to the online site:
 - a. In the button bar, click **Publishing**.
 - b. In the “Publishing destination” drop-down list, select the destination to which you want to publish the asset (**FSII Destination (dynamic)** in our example) and click **Select Destination**.
 - c. Click **Publish**.
 - d. In the pop-up dialog that appears, click **OK**.
 - e. Click **View PubSession** and wait for the publishing session to complete.

Your asset has been published to the online site and appears on the selected page. (Contact your CS administrator to obtain the URL for the online site.)

Exploring Content Management Concepts

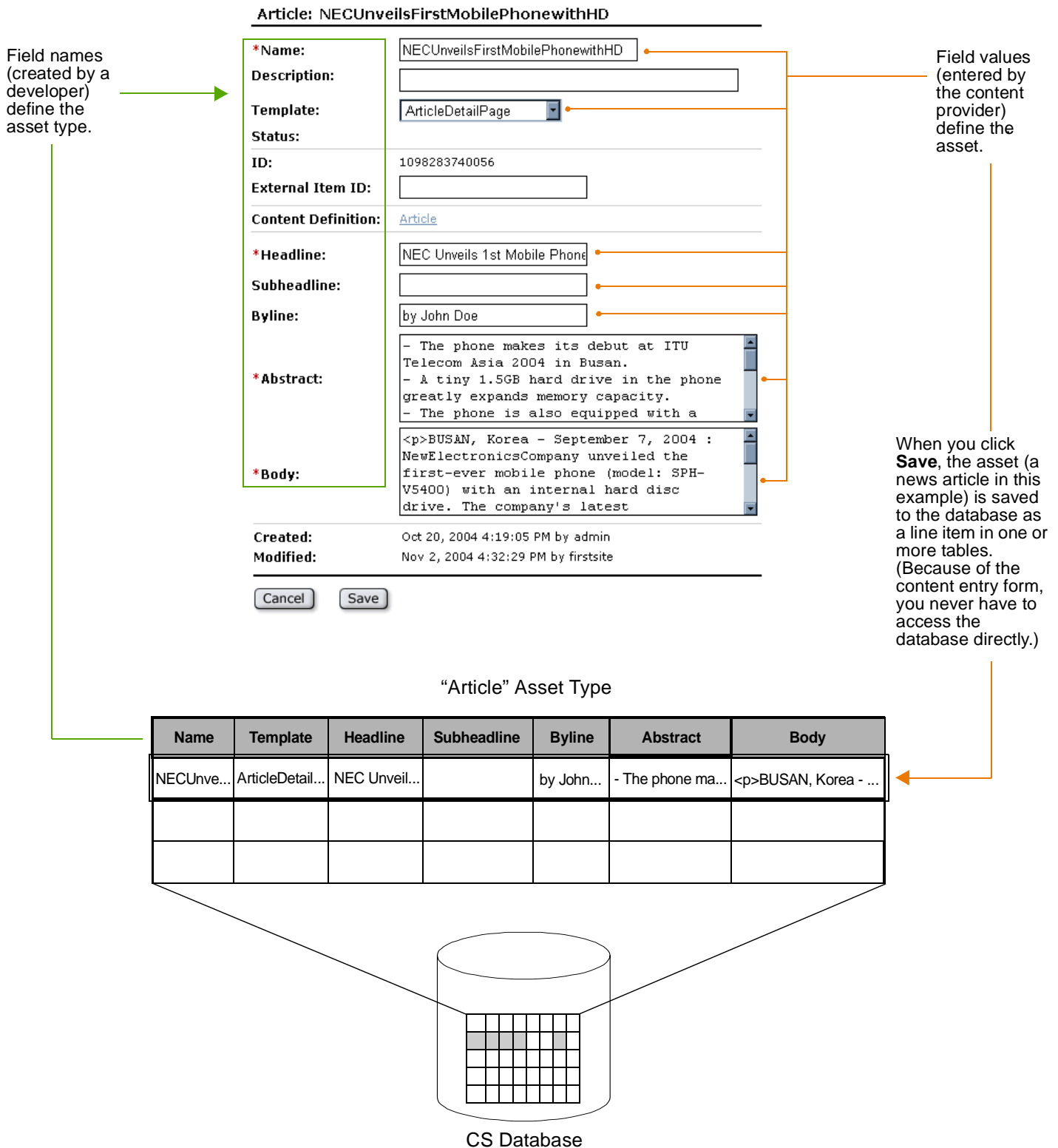
This section explains how Content Server defines and treats content. It explains terms such as “assets,” and “asset types,” which are used throughout this guide.

Content: Asset Types and Assets

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 articles from the “Article” asset type and the advertisements from the “Sports Car” asset type.

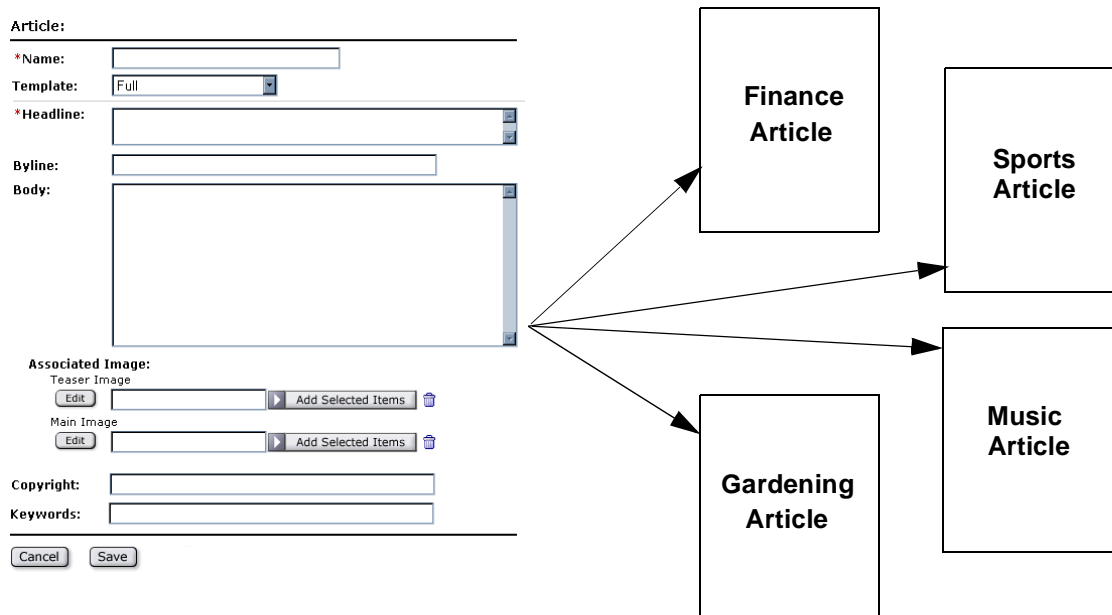
Each asset type is created by a developer and actualized in the CS interface as a content entry form, such as the one you see in [Figure 1, on page 19](#) (The same content entry form is shown in [Figure 3](#).) The form is given a name suggesting the type of content you will be providing. That name is the name of the asset type.

The content you are expected to provide is defined by the set of field names which make up the form and prompt you for the content. By populating the fields and saving your entries, you create an object called an “asset” in the CS database. That asset is content, which you can edit or delete, pass through a workflow, and publish. [Figure 3](#) illustrates the concept of an asset type and an asset, and shows how an asset containing a news article is related to the “Article” asset type.

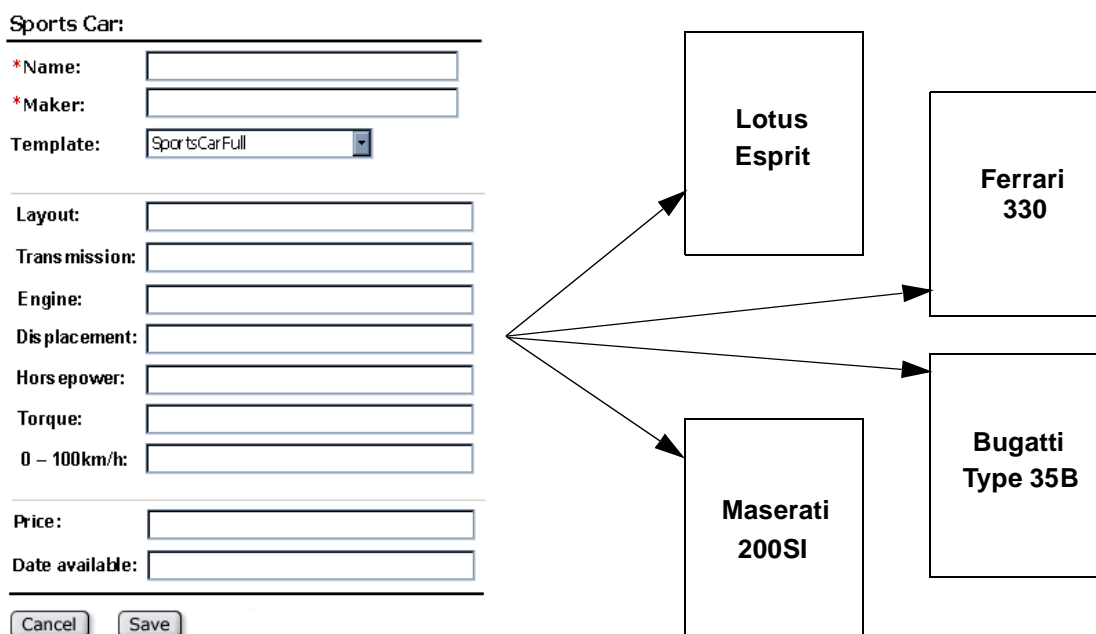
Figure 3: The relation between an asset and its asset type

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](#), we have the “Article” asset type from which a content provider created a newspaper article on the subject of media philosophy. 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:



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:



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 this page, 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, the fields described in this section 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

Article:

*Name:	<input type="text"/>
Template:	Full <input type="button" value="v"/>
*Headline:	<input type="text"/>
Byline:	<input type="text"/>
Body:	<input type="text"/>

- **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 68](#) for more information. To find out if your system is set up to support the CS-DocLink client, contact your administrator.

Document Asset

Document: Leave of Absence.doc

*Name:	<input type="text" value="Leave of Absence.doc"/>		
*File:	Filename Leave of Absence,0.doc	File type application/doc	Contents view this item
	<input type="text"/>	<input type="button" value="Browse..."/>	
*Title:	<input type="text" value="Leave of Absence"/>		
Subject:	<input type="text" value="Leave of Absence"/>		
Author:	<input type="text" value="Human Resources"/>		
Keyword:	<input type="text" value="HR"/> <input type="button" value="Add Another Keyword"/>		
Created:	Mar 9, 2004 10:11:50 AM by admin		
Modified:	Mar 9, 2004 10:11:50 AM by admin		

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.

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 language versions 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 to 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 language version of each asset is displayed on the online site.

If you are using the workflow feature, you can group the member assets of a multilingual set into a workflow group to make sure that all translations of an asset are approved before the master asset and its translations are published.

Design Assets

Structured content assets are called **design assets** if they are used to format and organize web site content. They are also used to automate your tasks. For example, instead of manually searching for assets to place in a collection, you simply choose them from a list of results that is automatically returned to you by a query that runs when you build the collection. Your administrator creates the query and assigns it to the appropriate “Collection” asset in advance.

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).

- **“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. As a content provider, your responsibility includes associating the content you want to appear on a particular page of the online site with the appropriate “Page” asset.

Before you can select the correct content for your “Page” assets, you must be familiar with two things: how your site is structured, and what the “Page” and “Template” assets available to you are designed to do. Consult your site developers for instructions on how to work with the “Page” and “Template” assets available to you.

- **“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.
- **“Link” assets** are used to embed external page URLs within structured content assets. You create a “Link” asset and store the external page URL within the asset. You then embed the “Link” asset into the desired structured content asset.
- **“Query” assets** provide custom search routines to assets that require specific sets of content. A query retrieves a set of assets based on specific criteria (for example, all articles about politics written in the last 24 hours). You select the content you want to include in your asset from the list of results returned by the query.

The administrator sets up the search criteria for your queries and assigns the queries in advance to the assets that need them. The content retrieval for such assets is thus automated — no user input is required for a query to return its results to the asset.

- **“Collection” assets** store lists of basic assets of a single asset type, organized in a specific order. You use “Collection” assets to choose, rank in order, and deliver sets of content that your visitors will most likely want to see when viewing your site. For example, you can use a “Collection” asset to build and place a list of top five articles on politics on the home page of your site, and rank the assets in the list to appear in order of importance.

The assets you can include in a collection come from the results returned by one or more queries. You choose the assets you want to include in the collection by ranking the assets in the order of your choice. Your administrator creates the appropriate “Query” assets and assigns them to the “Collection” asset in advance.

Using design assets is described in detail in [Chapter 3, “Working with Assets.”](#)

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.

Note

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.

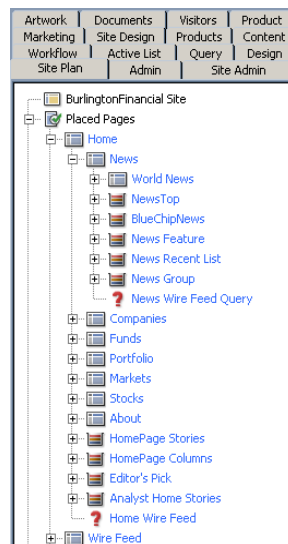
For more information, see [Appendix A](#), “The Flex Asset Model.”

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** tab in the tree in the left pane of the Content Server interface. For example, a section of the site plan for the Burlington Financial 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 **Site** link at the right edge of the top bar.

Once 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 Burlington Financial 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:

User Role Management

Site: [BurlingtonFinancial](#)

Select the user to modify:

User Name	Roles
   editor	Checker, Author, Editor, Approver
   firstsite	ArtworkEditor, GeneralAdmin, Approver, Designer, ArtworkAuthor
   fwadmin	GeneralAdmin, ArtworkEditor, Approver, Designer, ArtworkAuthor
   user_analyst	Analyst
   user_approver	Approver
   user_author	Author
   user_checker	Checker
   user_designer	Designer
   user_editor	Editor
   user_expert	Expert
   user_marketer	Designer, Marketer

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 Advanced Interface?

Which functions and assets you have access to in the Advanced interface 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.

If you have the permissions to work in the Dashboard interface, you may want to take advantage of the following features available there:

Table 1: Useful Dashboard interface features

Feature	Description
Lucene search engine	Find assets within the current site without having to specify their asset types. Search through names and values of all fields in all of the assets in the current site.
Tags	Create personalized lists of assets based on categories your choice.
“Locale Compare” mode	View two translations of an asset at once. Edit one translation while viewing another.

A comparison of features available in the Dashboard and Advanced interfaces is included in the *Content Server Dashboard Interface User's Guide*.

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 this case, the asset type will not be displayed in the “New” asset list. You will also be unable to copy 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.

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 you want to 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 content, you ensure that the content remains identical.

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 a list of assets referencing the asset you are trying to delete. You must first remove the reference creating the dependency between the assets; only then can the referenced asset be deleted. If a hierarchical relationship exists between multiple assets, you must remove the dependencies the bottom of the hierarchy up.

Selecting Page Content

As a content provider, you may be responsible for associating 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.

When selecting content, you can use the **Preview** function to see how an asset would look if it were published, provided the asset has a template assigned to it. For more information on previewing, see [“Previewing Assets,” on page 83](#).

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 asset is published to (and thus 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 a “Collection” asset; the “Collection” asset has an association with three “Article” assets; two of these articles have associations with “ImageFile” 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 more information about approving assets, see [Chapter 4, “Publishing.”](#)

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.

Content can be published in three distinct ways:

- **Static (or Export to Disk)** — Content Server creates static HTML files on a local or networked file system. Content in this form can be delivered directly to a web browser (by a web server, for example).
- **Dynamic (or Mirror to Server)** — Content Server copies the published content from the content management system’s database to the delivery system’s database. The delivery system is the online site that the site visitors access. When the content is requested by a site visitor, the delivery system retrieves the content from its database,

applies the selected formatting and layout, and delivers that content to the site visitor's browser. (If the content is already cached, the cached copy is delivered instead.)

- **Export to XML** — Content Server converts the published content to XML files. The resulting XML files can be imported by delivery systems not running Content Server.

In the end, which publishing method is used depends largely on your Content Server configuration and the choices made by your administrator.

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

For more information on publishing, see [Chapter 4, “Publishing.”](#)

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.

When you log in to the CS interface, Content Server shows you all of the assets assigned to you (under the “My Assignments” heading) and informs you how much time you have to complete each assignment. 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.

Workflow Groups

Workflow groups allow you to group assets in a workflow process so they reach the end of the workflow process together, prior to publishing. When creating the workflow group (provided you have the permissions to do so), you decide who can assign assets to the group and who can administer the group itself. You also assign a workflow process to the group.

Workflow Reports

Workflow reports allow you to track the progression of assets and user assignments in a workflow. They are a convenient mechanism for determining current workflow status. For example, you could run a report designed to show all authors who have assignments due in the next 24 hours. For more information about workflow, see [Chapter 5](#), “[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 6](#), “[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 checking an asset in, 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. You, and any other user, can also view the asset's version history.

Part 2

Working in the Advanced Interface

This part describes how to use Content Server's Advanced interface. It contains the following chapters:

- [Chapter 2, “Navigating Content Server’s Advanced Interface”](#)
- [Chapter 3, “Working with Assets”](#)
- [Chapter 4, “Publishing”](#)
- [Chapter 5, “Workflow”](#)
- [Chapter 6, “Revision Tracking”](#)

Chapter 2

Getting Started

This chapter describes how to log in to and use Content Server's Advanced interface. It includes the following sections:

- [Logging In](#)
- [Navigating Content Server's Advanced Interface](#)
- [When You Finish Your Work](#)

Logging In

To log in to Content Server's interface

1. Open your browser and enter the URL to your Content Server system. You can obtain this URL from your administrator. The URL has the following syntax:

`http://<server>:<port>/<context>/Xcelerate/LoginPage.html`

where:

- <server> is the host name or IP address of the machine running Content Server.
- <port> is the number of the port on which Content Server is listening for connections.
- <context> refers to the application context root (URI) assigned to the Content Server application when it was installed.

If you have questions about any of the above parameters, contact your administrator.

The login form appears:



FatWire | Content Server 7

User Name:

Password:

 [Forgot your password?](#)
[Don't have an account?](#)

Installed Products:

- Content Server 7.0
- CS-Direct 7.0
- CS-Direct Advantage 7.0
- CS-Engage 7.0
- Commerce Connector 7.0

Notice that the form lists which members of the CS product family are installed.

2. Enter your user name and password, and click **Login**.

For help with your user name or password, contact your CS administrator by clicking the link (in the lower portion of the login form) that best matches the issue you are experiencing.

3. If more than one site is set up, select the site you want to work with. If a single site exists, the interface opens immediately. You can work with only one site at a time, but once logged in, you can switch between sites, if other sites to which you have access rights are available.

You have logged in as fwadmin

Select a site that you want to work on:

Site	Description	Assigned Role
BurlingtonFinancial	Burlington Financial	GeneralAdmin, ArtworkEditor, Approver, ContentEditor, WorkflowAdmin, Analyst, Pricer, Marketer, SiteAdmin, Checker, MarketingAuthor, MarketingEditor, Author, Editor, ContentAuthor, Expert, ProductAuthor, ProductEditor, DocumentAuthor, DocumentEditor, Designer, ArtworkAuthor
FirstSiteII	FirstSite Mark II	ArtworkEditor, GeneralAdmin, Approver, ContentEditor, WorkflowAdmin, Analyst, Pricer, Marketer, SiteAdmin, Checker, MarketingAuthor, MarketingEditor, Author, Editor, ContentAuthor, Expert, ProductAuthor, ProductEditor, DocumentAuthor, ArtworkAuthor, Designer, DocumentEditor
GE Lighting	GE Lighting	Designer, SiteAdmin, WorkflowAdmin, GeneralAdmin

[\[Log in again\]](#)

When following exercises in this guide, select the Burlington Financial sample site (if installed on your system) whenever you are asked to log in, unless directed otherwise.

Continue on to the next section for an introduction to Content Server's Advanced interface.

Navigating Content Server's Advanced Interface

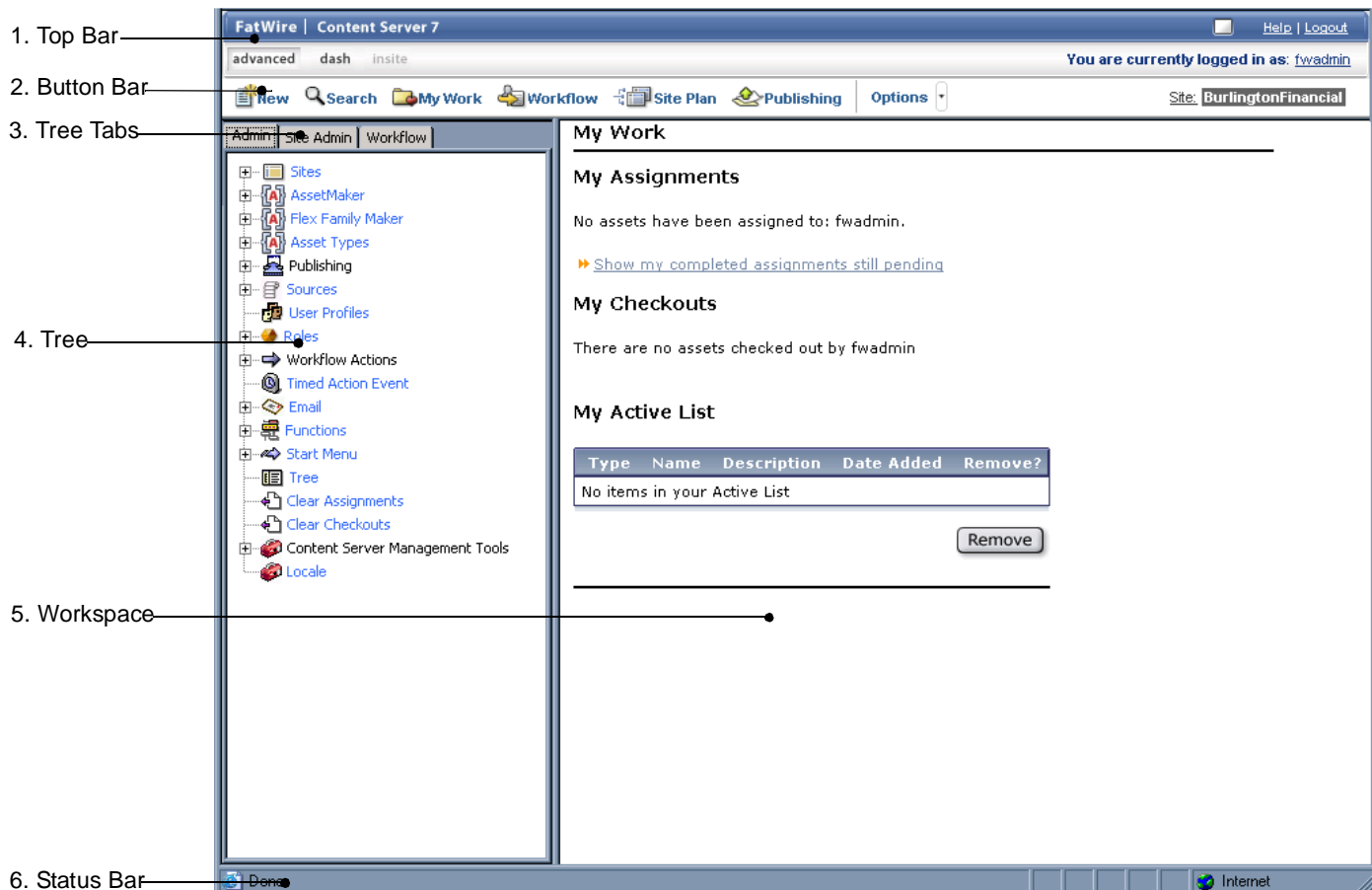
The appearance of Content Server's Advanced interface is determined by a number of factors, including:

- Which products are installed
- Which site you have selected to work in
- Your role(s) as a user
- Administrative configuration decisions

Open Content Server's Advanced interface by doing the following:

1. Log in to the Content Server interface by following the instructions in “[Logging In](#),” on page 42.
2. If prompted, select the site you want to work with (**Burlington Financial** in this example).

The Advanced interface loads. A typical view of the Advanced interface for a user working with the Burlington Financial sample site is shown below:




The key components of the Advanced interface, as indicated in the preceding figure, are:

1. **Top Bar** – gives you single-click access to the Dashboard interface and the FatWire e-docs site; the means to toggle the tree on and off; and the means to log out of Content Server.

Your user name is displayed near the right edge of the bar. Click your user name to reveal a list of roles associated with it, and therefore the permissions granted to you on the current site.
2. **Button Bar** – gives you single-click access to common content management tasks.
3. **Tree** – presents information about the site's organization and assets, categorized by tabs that are configurable, customizable, and dynamic.
4. **Workspace** – where you take follow-up action on your initial request, such as, to create an asset, perform a search, review assignments, and so forth. Most often, you work in a form or with a list in this space.
5. **Status Bar** – displays a description when you move the mouse pointer over a screen component. It also reports processing activity. The status bar appears only if you configure your browser to display it.

Top Bar

The top bar gives you quick access to the following functions:

- **Dash** – opens a new browser window which loads the Dashboard interface and automatically logs you in to the site in which you are currently working.
- **Toggle Tree**  – toggles the tree on and off. When you toggle the tree off, the workspace extends across the full width of the window with a refreshed display of the **My Work** view, regardless of what was displayed in the workspace with the tree toggled on. Note that tree display and tree toggling are under administrative control and may not be enabled in your site.
- **User name** – displays a list of roles assigned to your user name, and therefore the permissions granted to you on the current site. CS includes a set of generically linked user names to roles (user_author as “Author,” for example) to help you get started. For more information on these supplied user names and roles, see your administrator.
- **Help** – opens the FatWire e-docs site in a new browser window. The FatWire e-docs site contains documentation for Content Server and its supporting software; check this site periodically for updates to the documentation suite. Note that the site is password-protected; you must contact FatWire Support to obtain access.
- **Logout** – ends your session and logs you out of Content Server.

Button Bar

The button bar gives you quick access to Content Server's most frequently used asset management functions:

- **New** – creates new instances of the asset types you have permission to create.
- **Search** – finds assets in the site based on criteria you provide.
- **My Work** – shows your current workload. Refreshes the current workload view each time you click the button.
- **Workflow** – manages workflow reports and workflow groups.

- **Site Plan** – shows the hierarchical view of the site's "Page" assets and their related assets, as arranged by the site designers.
- **Publishing** – shows the Publishing Console to review publishing activity.
- **Options** – allows you to choose your preferred way of displaying buttons in the bar.
- **Site** – shows the site select screen you see when you log in (assuming you have permissions to work with more than one site, and that more than one site is available).

New

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with (**Burlington Financial** in this example).
3. In the button bar, click **New**.

A list of assets you can create, sorted alphabetically, appears in the workspace; for example:

New

Please select the asset type that you want to create:

Type	Name
Article	New Article
Article Flex	New Article Flex
Collection	New Collection
Article	New Columnist Article
Content Parent	New Content Parent
Drill Hierarchy	New Drill Hierarchy
Image Flex	New Image Flex
ImageFile	New ImageFile
Link	New Link
PDF	New PDF
Product	New Product
Product Parent	New Product Parent
Recommendation	New Recommendation
StyleSheet	New StyleSheet

4. Click the **New** link for the desired asset type (for example, **New Article**) to display the asset's "New" form in the workspace.

Note that the "New Asset" list has been personalized for you by your administrator based on the role assigned to you and the sites that you are permitted to log in to. Thus, only the assets you are permitted to create will appear in this list.

For each asset type in the list, the administrator can pre-assign a workflow process and set the workflow participants.

For each asset type, the administrator can set fixed, pre-defined values for certain fields in the asset's content entry form; if that's the case, you cannot change these values. The administrator can also establish editable default values for each field, which you can change.

Search

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with (**Burlington Financial** in this example).
3. In the button bar, click **Search**.

The list of asset types that you can search for appears in the workspace; for example.

Search

Type	Name	
Article	Find Article	(advanced search)
Article Flex	Find Article Flex	(advanced search)
Collection	Find Collection	(advanced search)
Content Parent	Find Content Parent	(advanced search)
Drill Hierarchy	Find Drill Hierarchy	(advanced search)
Image Flex	Find Image Flex	(advanced search)
ImageFile	Find ImageFile	(advanced search)
Link	Find Link	(advanced search)
Page	Find Page	(advanced search)
PDF	Find PDF	(advanced search)
Product	Find Product	(advanced search)
Product Parent	Find Product Parent	(advanced search)
Query	Find Query	(advanced search)
Recommendation	Find Recommendation	(advanced search)
StyleSheet	Find StyleSheet	(advanced search)

Saved Searches

Please select the Saved Search that you want to execute

	Name	Asset Type	Shared
	Funds Articles	Article	private

4. Perform a search in one of the following ways:
 - Click the asset type in the list to open the simple "Search" form in the workspace.
 - Click **Advanced Search** to open the advanced "Search" form for the asset type.
 - Execute a saved search by clicking its name (or the binoculars icon next to it).

Like the types of assets that you can create, the types of assets that you can search for are determined by the administrator based on your role and site permissions. This list might include types of assets that do not appear in the **New** asset list. In other words, you can search for and inspect assets of these other asset types, but you cannot create new instances of them.

A list of saved searches, if any, will also appear below the list of searchable assets. A saved search refers to the criteria on which a previous search was based, not the results of a search. Saving search criteria is an efficient way of handling searches that you run repeatedly. Saved searches can be shared, so the list can appear even if you haven't specifically saved any searches.

My Work

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with (**Burlington Financial** in this example).

Your current workload is displayed in the workspace.

Your workload consists of the assets that you either have chosen or have been assigned to work on. These include:

- Your assignments as established through workflow.
- Assets under revision tracking that you have (specifically or automatically) checked out.
- Assets on your Active List; that is, assets that you have designated to keep from session to session, until you decide to remove them from the list.

Initially, the “My Work” view may show only the following:

My Work

My Assignments

No assets have been assigned to: user_author.

[▶ Show my completed assignments still pending](#)

My Checkouts

There are no assets checked out by user_author

My Active List

Type	Name	Description	Date Added	Remove?
No items in your Active List				

Click the **My Work** button in the button bar to refresh the view. As you manage your workload during a session, the lists will change to reflect what you are doing.

Benefits of Using the Active List

The Active List is your personal asset ledger that you maintain over time. The list is empty until you explicitly add assets to it. Assets that you have added to the list remain there until you explicitly remove them from the list (or until they are deleted).

The Active List has a number of uses, including:

- Provides a mechanism for saving search results, allowing you to examine individual assets one by one.
- Populates the “Candidates” list for establishing unnamed associations when the tree is toggled off.
- Becomes a source (together with the asset history list) of assets from which to choose an asset to link to an asset you are creating or editing.

Note that the Active List shows only those assets that are available to the site you are viewing.

Workflow

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Workflow**.

The workflow management console is displayed in the workspace, as shown below:

Workflow

Please select one of the following items

[Create a Workflow Report](#)

[Create a Workflow Group](#)

Workflow Groups

Name	Description	Workflow Process	Items

Saved Workflow Reports

There are no Saved Workflow Reports

The console is used for creating and managing workflow groups and workflow reports.

For detailed information on workflow functionality, see [Chapter 5](#), “Workflow.”

Site Plan

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with (**Burlington Financial** in this example).
3. In the button bar, click **Site Plan**.

A list of child pages under the site root node is displayed in the workspace. The list consists of all top-level “Page” assets for the site. In the example below, the child page list for the Burlington Financial sample site's root node is shown:

Browse BurlingtonFinancial Site Plan

Current Site: BurlingtonFinancial

Child pages:

Name	Children
Home	7
Wire Feed	0
Columnists	0
Topic Directory	0
Contact Us	0
Account Access	4
Browse For Funds	0
Available Funds	0
FundCategoryDrillDown	0
SubPageofArticles	0
SubPageLink	0
FundFinderCachelet	0
FundBuyPage	0
ProcessClick	0
FundSearchResultsCachelet	0
AvailableFundsCachelet	0
FundGroupCachelet	0

Unplaced pages:

There are no unplaced pages.

[Place](#) pages under this Site.

The number following each hyperlinked page indicates how many child “Page” assets are directly below that top-level page. This view also denotes any unplaced pages and provides a link to the **Place Page** function.

The site plan that you can browse from the button bar is also visible as a hierarchical structure in the “Site Plan” tab in the tree in the left-hand portion of Content Server’s interface (see “[Tree](#),” on page 53). However, the version invoked from the button bar provides a more detailed view, with detailed page information viewable one node at a time. Browsing the site plan from the button bar is also an alternative when the tree is toggled off or otherwise unavailable to your user role.

Note

Pages are placed and unplaced according to how the site plan is built; that is, where in the site hierarchy pages are to appear in relation to each other. This is typically the responsibility of the site designers.

4. For the purpose of this example, drill down through the site plan of the Burlington Financial sample site to reach the Tech Stocks page by doing the following:
 - a. Click **Home**.
 - b. Click **Stocks**.
 - c. Click **Tech Stocks**.





Content Server displays the detailed information for the Tech Stocks page.


The sections of the form are described below using the Tech Stocks page as an example.

Asset Details

This section is typical of the “Inspect” form view of an asset, with the action bar of standard command icons **Preview**, **Inspect**, **Edit**, **Delete**, and a drop-down list of functions you can perform on this asset type. Details also include identifying information such as name, description, asset type, and status. Here are the asset details of the Tech Stocks page:

Browse BurlingtonFinancial Site Plan - Tech Stocks

 Preview
  Inspect
  Edit
  Delete

 Add to My Active List

Name: Tech Stocks
Description: Burlington Financial Tech Stocks
Status: Edited
ID: 968695082886
Type: Page
Modified: Mar 16, 2001 12:09:35 PM by user_author

Path

This section provides the trail of assets you followed from the site root node to the current asset. You can work your way back up the chain by clicking a link to return to that level within the site plan. Note that a “Page” asset has only one path back to the site root node, while other asset types can have multiple paths. Here’s the path that takes you from the Burlington Financial root node to the Tech Stocks page:

Path: [BurlingtonFinancial](#)
 └─ [Home](#)
 └─ [Stocks](#)
 └─ [Tech Stocks](#)

Child Pages

If the asset you are viewing is a “Page” asset, you see all of its child pages and the number of child pages directly below each (“Page” assets can only be children of the site plan root or of other “Page” assets). A link invoking the **Place Page** function is also present in this section. Shown below are the child pages for the Burlington Financial Home page:

Child pages:

Name	Children
News	1
Companies	0
Funds	1
Portfolio	0
Markets	2
Stocks	2
About	0

[Place](#) pages under this Page.

Related Assets

This section shows the child assets of the current asset and their number of directly referenced assets. The example below shows the child assets of the Burlington Financial Home page:

Related Assets:

Collection:

	Name	Description	Related
SidebarBottom	Analyst Home Stories	From our Analysts	6
SidebarMiddle	Editor's Pick	Editor's Pick	8
SidebarTop	HomePage Columns	collection of columns for the home page	4
TopStories	HomePage Stories	HomePage Top Story List	15

Query:

	Name	Description	Related
WireFeed	Home Wire Feed	Home Wire Feed Query	0

Multiple Paths

You might also see other assets that reference the current (non-page) asset. For example, the same article may be ranked in several collections. Here is an “Article” asset displayed via one path and simultaneously referenced by another asset:

Path: [BurlingtonFinancial](#)

```

├─ Home
│   └─ Markets
│       └─ MarketsTop
│           └─ Scania-A620-2001Mar9

```

This asset does not refer to any other assets.

The Article 'Scania-A620-2001Mar9' is also referenced by:

Name	Description	Type
CompaniesTop	Top Stories	Collection

When there are multiple paths to the same asset, only the path you followed to get to the asset is displayed. Any other possible path is visible as another asset referencing the current asset.

So, in the example above, the “Article” asset was displayed from the MarketsTop collection, and is referenced by the CompaniesTop collection. If you go to the CompaniesTop collection, you will see the same article ranked there. If you follow that link, the roles are reversed: CompaniesTop is in the path, and MarketsTop is the other reference.

Publishing

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click the **Publishing** button on the button bar
Content Server displays the Publish Console, as shown below:.

Publish Console

Select Publish Destination

Publish destination

Static (using Export to Disk)

Select Destination

Running Publish Sessions

No Running Publish Sessions

Scheduled Publish Tasks

No Scheduled Publish Tasks

Publish History

No Publish History

The Publish Console provides a brief summary of the status of the publishing activities at your site. It shows:

- What is being published (**Running Publish Sessions**)
- What will be published (**Scheduled Publish Tasks**)
- What has been published (**Publish History**)

By clicking **Select Destination**, you can see how many assets have been approved for publishing, and how many are being held pending approval of related assets, for the selected destination. These numbered totals are hyperlinks to lists of the respective approved and held assets. The list of held assets is particularly useful in troubleshooting publishing delays. If you have the right permissions, you can initiate a publishing session for assets that are ready to be published. For more information on the Publish Console, see [Chapter 4, “Publishing.”](#)

Options

Allows you to choose your preferred way of displaying the buttons in the button bar. Click the arrow button next to the **Options** button bar item to display a list of possible options:

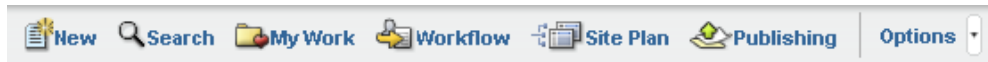
- **Words** – displays the buttons as text only.



- **Icons** – displays the buttons as icons without text labels.



- **Words and Icons** – displays the buttons as icons with text labels. (The button bar defaults to this option every time you log in.)

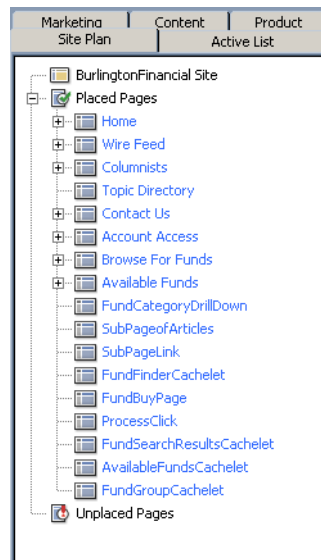


Site

Returns you to the site select screen you see when you log in (assuming you have access to more than one site). This screen allows you to switch to another site using the user credentials you supplied when you logged in. If you click the **Site** link and there are no other sites, the window refreshes to the current **My Work** view.

Tree

The tree refers to the tabbed hierarchical structure that appears in the left pane of Content Server's interface. If your administrator has enabled the tree, your view of the site and its assets is reflected in this hierarchy whenever you toggle on the tree. In the example below, the tree shows the site plan for the Burlington Financial sample site:



Notice that it presents the same root site node (top-level page) view as shown in the button bar version of the site plan (see “[Site Plan](#),” on page 49). The site plan helps you visualize the configuration of pages and their contents. It also helps you understand the relationships and dependencies that exist for any given page. The tree is both a visual aid and an action launch pad.

The tree is dynamic — its composition changes as you navigate the site and perform asset management tasks. What you see is based on a combination of the site configuration, installed products, sample sites, roles, and your activities during the current session.

If the Tree Is Disabled or Toggled Off

In some situations, your administrator may have disabled the tree, for example, if your company's security policy does not allow the execution of Java applets on employee

machines. You may also have the ability to toggle the tree on and off yourself, if the administrator granted you the permissions to do so. If the tree is disabled or toggled off, you will not see it in your interface.

The procedures in this guide describe the default and most common implementation of Content Server's user interface where the tree is enabled. If for some reason the tree is disabled on your system, consult your administrator to find out why it has been disabled. For information on how to perform content management tasks that require the tree, when the tree is disabled (or toggled off), see [Appendix B](#), “[When There Is No Tree](#).”

Tree Tabs

The tabs displayed in the tree, as well as their contents, are influenced by many factors, including:

- Permissions and other administrative decisions
- Installed products
- Installed sample sites, and the current site you are logged in to
- User activity during a session

The following table describes how and when tabs appear in the tree by default:

Tab Name	How and When It Appears in the Tree
Site Plan	A default tab included with the software.
Active List	<p>A default tab which is initially blank. It becomes populated as you specifically add items to it from asset forms and asset lists (see “Working with the Active List,” on page 60). The list is specific to assets from the site you are logged into, unless the assets are shared.</p> <p>This list is persistent; that is, it is stored from session to session, and grows and shrinks as you add assets to and remove them from the list. A session is defined as the duration of a single logon to one site or more sites.</p>
History	Appears automatically when you perform the first asset management task in the course of your session. The contents of the History tab exist only for the current browser window during the current session. If you open a new window during the session, the History tab is reset for that window. Keep in mind the History tab is site-specific — switching sites clears the history.
Marketing	Appears if you have Engage installed. Sample assets appear if the sample sites and their data are installed.
Design, Query	Appear only if you have appropriate permissions (see the <i>Content Server Administrator's Guide</i>).
Admin, Site Admin, Workflow	Appear only if you have the respective admin privileges (see the <i>Content Server Administrator's Guide</i>).
<i>user-defined</i>	Appear only if the administrator has configured custom tabs (see the <i>Content Server Administrator's Guide</i>).

Using the Tree

When working in the tree, you click on tabs to display their contents. A tab in the back row of tabs moves to the front when clicked. You expand and collapse branches of the tree by clicking the plus and minus signs. You can resize the tree pane by dragging its right edge right or left to change its width.

The tree is automatically refreshed when you make a change locally; that is, if you add a new asset, it appears immediately in the tree. To see someone else's changes who might be working on the same site, you have to use the **Refresh** command (see the table below).

You perform most functions within the tree by using context (pop-up) menus invoked by right-clicking on a tree node or the white space. The context menus change according to which tab you are viewing and where the mouse is pointing. Context menu commands are summarized in the following table:

Command	Action
Delete	Marks the selected asset for deletion (you must have the right permissions).
Remove	Removes the asset from your Active List.
Edit	Opens a form in the workspace for editing the selected asset.
Inspect	Opens a page in the workspace for inspecting details of the selected asset.
Refresh	Refreshes all children below the selected node to ensure that you are looking at the latest version of the tree.
New <i>asset type</i>	Opens a form in the workspace for creating a new instance of the selected asset type. Restricted to the asset types you have permissions to create. For flex assets, you can create a flex parent (like this one), or a child of the flex parent (child).
Status	Opens a page in the workspace for viewing the status of the selected asset.
Preview	Displays the selected asset as it would appear on the delivery site. A new browser window opens to show the preview.
Place Page	Opens a dialog box in the workspace so that you can place and unplace pages in the tree, and also rerank pages. A page must be placed before it can be published. This is a design activity that requires the right permissions. It is available only from the Site Plan tab.
Refresh All	Refreshes the tab contents with a single click.
Clear All	Clears the contents of the History tab. For this command to appear, you must right-click in the empty space inside the tab (not on an asset).

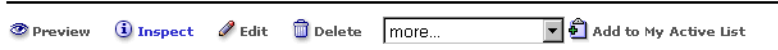
Tip: Double-click an asset in any tree tab to display the asset in its “Inspect” form.

Workspace

The workspace is the portion of Content Server's interface that displays forms and lists, based on the action you have taken. Its contents change to reflect your latest request.

When you first log in, the workspace displays your current workload.

When you view an asset in its "Inspect" form, or variations such as the "Status" form, the action bar appears at the top of the form, shown as follows:



This offers a selection of actions you can take on the current asset, as described in the following table:

Table 2: Action bar functions

Action	Results
Expand drop-down list	<p>Depending on asset type and permissions:</p> <ul style="list-style-type: none"> • Approve the asset for publishing • Make a copy of the asset (if you are allowed to create a new instance of this asset type) • Create a new instance of the same asset type (if you are allowed to create a new instance of this asset type) • Create a translation of the asset (if you are allowed to create a translation of this asset type) • Search for an asset of the same type • Show asset status • Share the asset across sites (if you have access to other sites where the asset type is also enabled; cannot share "Page" assets) • Browse in Site Plan ("Page" assets only) • Build a collection ("Collection" assets only)
Preview	<p>Opens the InSite interface and displays an asset as it would appear on your site, using the template assigned to it as the default format. You can also see how the asset looks using another appropriate template by making a selection from the drop-down list in the InSite bar.</p> <p>Additionally, you can click the Preview in Full Window hyperlink in the top bar to view the asset in a new browser window that does not display the InSite interface.</p>
Inspect	<p>Displays a summary of the asset's details such as name, description, ID, and so forth.</p>
Edit	<p>Opens the asset in an edit form, where you can make changes to that asset. You can either save or cancel those changes from the "Edit" form.</p>

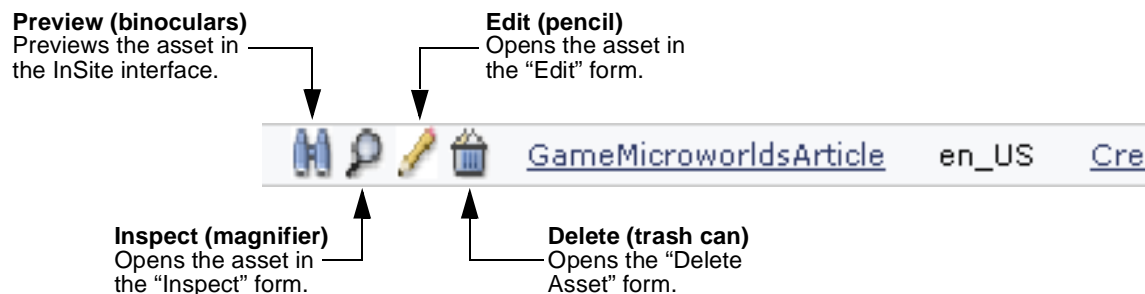
Table 2: Action bar functions *(continued)*

Action	Results
Delete	Marks the asset for removal in the database. The next time your database administrator purges the database, that asset is deleted.
Add to...	Adds the asset to your Active List. If the asset has already been added, the note at the top of the window reads: This item is already in user's Active List.

Similarly, when you are viewing a list of assets, each asset may have its own set of action icons and selections. The image below displays an asset from a list of search results.



Here, you have the same icons as on the asset forms, a link to the asset's status (**Created**), but no other drop-down functions, and a check box to single out assets to add to your Active List when you click the **Add to My Active List** button. The icons appearing next to the asset are as follows:



When You Finish Your Work

When you are finished working with Content Server, click **Logout** in the upper right corner of the interface to terminate your session. The interface returns to the login form.

Continue on to the next chapter for an in-depth look at Content Server asset management tasks.

Chapter 3

Working with Assets

Assets are objects that serve as the building blocks of Content Server. They can be created, edited, inspected, deleted, duplicated, assigned to workflow, tracked through revision tracking, searched for, previewed, and approved for publishing.

As mentioned in [Chapter 1, “Overview”](#) CS provides you with several content and site design assets. For definitions of these asset types, see the section “[Content: Asset Types and Assets](#),” [on page 23](#). Because your system is customized for your organization, you most likely have many more asset types to work with than the ones defined in that section.

Although there can be many different types of assets, you work with all of them in similar ways, using the same procedures. This chapter describes the basic procedures for working with assets, illustrated with examples from the Burlington Financial sample site.

This chapter contains the following sections:

- [About Permissions](#)
- [Working with the Active List](#)
- [Creating New Assets](#)
- [Finding Assets](#)
- [Editing Assets](#)
- [Working with the InSite Interface](#)
- [Working with WYSIWYG Editors](#)
- [Working with Multilingual Assets](#)
- [Embedding Links Within Assets](#)
- [Sharing Assets with Other Sites](#)
- [Working with Grouped Assets](#)
- [Working with Asset Associations](#)
- [Working with “Page” Assets](#)
- [Deleting Assets](#)

About Permissions

Your ability to perform asset management tasks such as creating, editing, or deleting an asset (and more) depends on permissions set up by the administrator of your Content Server system. The administrator either grants or denies permissions to users based on their roles. Roles represent job descriptions (or titles) of individuals with specific functions, such as content provider, editor, designer, or administrator. A role can be granted to more than one user; a user can also hold more than one role.

If you try to perform a task you do not have permissions for (or your role is not authorized to perform), Content Server displays a warning notifying you of that fact.

Access to assets and asset management tasks can also be restricted by workflow. If workflow is in use on your site, at times you might not be allowed to work with certain assets, depending on their workflow state and your assigned role(s). For example, your system might be set up so that only users with the editor role (but not the author role) can work on assets that are in the “Ready to Edit” state. In such cases, if you have a role other than the editor role, you will not be able to work on assets in that workflow state. For more information about workflow, see [Chapter 5](#), “[Workflow](#).”

Working with the Active List

The Active List is your personal asset ledger that you maintain over time. It is a place to store assets that you may require access to in the middle of a task, as many of Content Server’s asset management tasks require the selection of assets as part of the process. In such cases, you search for and add the required assets to your Active List first, and then perform the task requiring selecting those assets.

The Active List is empty until you explicitly add assets to it. Assets that you have added to the list remain there until you explicitly remove them from the list (or until they are deleted).

Viewing the Active List

To view the Active List

You can view the Active List in the following ways:

- Click **My Work** in the button bar. You may have to scroll down, because the Active List is the last of three lists appearing in this view. “My Work” is also the view you see when you first log in.
- Select the **Active List** tab in the tree. The tab shows all assets currently on your Active List.

Note that the Active List view is site-specific. If you add assets from one site, then switch sites and view your Active List again, you will not see the assets that you added in the first site, unless those assets happen to be shared with the second site.

Adding Assets to the Active List

You can add assets to the Active List from a list of search results, or from an asset's "Inspect" form.

To add assets to the Active List from a list of search results

1. Find the asset(s) you want to add to your Active List:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset(s) you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

The search results list appears in the workspace:

	Name	Locale	Headline	Status	Modified	
   	100-A637-2001Mar9		100 Blank Passports Still Missing in D.C.	Received	Mar 18, 2001	<input type="checkbox"/>
   	AMD-A580-2001Mar9		AMD Completes Sale of Communications Business	Received	Mar 18, 2001	<input type="checkbox"/>
   	American-A506-2001Mar9		American Express,Ventro to Build B-to-B Marketplace	Received	Mar 18, 2001	<input type="checkbox"/>
   	Analysis-A67-2001Mar9		Analysis: Hillary Lacks Political Luck	Received	Mar 18, 2001	<input type="checkbox"/>
   	Analysts-A322-2001Mar9		Analysts See Strong Q3 Earnings Despite Recent Warnings	Received	Mar 18, 2001	<input type="checkbox"/>
   	Andersen-A608-2001Mar9		Andersen Consulting Wins Arbitration Case; Will Formally Separate from Arthur Andersen	Received	Mar 18, 2001	<input type="checkbox"/>

[Add to My Active List](#)

2. Select the assets you want to add by clicking their checkboxes. You must select at least one asset before clicking the **Add to My Active List** button.
 3. When you have selected all of your assets, click **Add to My Active List**.
- Content Server displays your updated Active List showing the assets you just added.

To add an asset to the Active List using the asset's "Inspect" form

1. Find the asset you want to add to your Active List:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

2. Scroll to the asset you want to add to your Active List and click its **Inspect** icon. Content Server displays the asset's "Inspect" form.
 3. In the "Inspect" form's action bar, click **Add to My Active List**.
- Content Server displays your updated Active List showing the asset you just added.

Removing Assets from the Active List

To remove an asset from the Active List

1. Access your Active List. In the button bar, click **My Work** and scroll to the Active List section of the “My Work” view.

My Active List

Type	Name	Description	Date Added	Remove?
   Article	Analysis-A67-2001Mar9	Analysis: Hillary Lacks Political Luck	2007-01-17 14:08:12	<input type="checkbox"/>
   Article	Analysts-A322-2001Mar9	Analysts See Strong Q3 Earnings Despite Recent Warnings	2007-01-17 14:08:12	<input type="checkbox"/>
   Article	American-A506-2001Mar9	American Express, Vento to Build B-to-B Marketplace	2007-01-17 14:08:12	<input type="checkbox"/>
   Article	100-A637-2001Mar9	100 Blank Passports Still Missing in D.C.	2007-01-17 14:08:11	<input type="checkbox"/>

Remove

2. Select the assets you want to remove by clicking their checkboxes. You must select at least one asset before clicking the **Remove** button.
3. Click **Remove**.

The list refreshes, showing the results of the removal.

Note

You can also remove an asset by right-clicking the asset in the **Active List** tab and selecting **Remove** from the pop-up menu.

If an asset on the Active List is deleted from the system (by you or anyone else), it will also disappear from the list.

Creating New Assets

If you have the right permissions, you can create brand new assets “from scratch,” using Content Server’s Advanced 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 Dashboard interface (described in the *Content Server Dashboard 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 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 “New” asset form in Content Server’s interface; the assets you create with CS-DocLink are stored in their native format as single objects called **blobs**, or **binary large objects**.

Note

Multilingual asset management functions, such as assigning locale designations or creating translations of assets, are not supported in CS-Desktop nor CS-DocLink.

Which Assets Can You Create?

The assets you can create (and copy) are determined by how the administrator has personalized the **New** button on the button bar for your role. The purpose of personalizing the contents of the **New** button 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 **New** button, 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

To create a new asset

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with (**Burlington Financial** in this example).
3. In the button bar, click **New**. Content Server displays a list of asset types from which you can create assets.
4. Click the asset type of the asset you want to create (**New Article** in this example).

5. If the “Choose Assignees” screen (on the right) is not displayed, it means that your asset is either not assigned to a workflow or is assigned to a workflow that does not require choosing assignees. Proceed to [step 6](#). Otherwise, continue with this step.

Choose Assignees

The workflow associated with this asset requires you to select assignees. Select at least one user from each role.

Cancel

Set Assignees

Workflow Process: BF: Normal Article Process					
Assignees:	<table border="1"> <thead> <tr> <th>Role</th> <th>Users</th> </tr> </thead> <tbody> <tr> <td>* Author:</td> <td> <div> <div>editor</div> <div>firstsite</div> <div>fwadmin</div> <div>user_author</div> </div> </td> </tr> </tbody> </table>	Role	Users	* Author:	<div> <div>editor</div> <div>firstsite</div> <div>fwadmin</div> <div>user_author</div> </div>
Role	Users				
* Author:	<div> <div>editor</div> <div>firstsite</div> <div>fwadmin</div> <div>user_author</div> </div>				

Cancel

Set Assignees

- a. In the **Assignees** field, go to the **Users** list box and select the workflow assignees — users to whom you are assigning this asset. Any of these users can complete the next step in the workflow process.
 To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user. (If you need information about workflow, see [Chapter 5](#), “Workflow”)
 - b. Click **Set Assignees**.
6. The asset type you are working with may be divided into subtypes. If this is the case, the “Subtype” drop-down list will appear in the “New” asset form, from which you will need to select the subtype of the new asset. If this drop-down list does not appear, proceed to [step 8](#).
 7. (Optional. For translations.) If you plan to create translations of the asset, set the asset's language in the “Locale” drop-down list.
 8. Enter information in the fields of the content-entry form that is displayed. If a field has an asterisk (*) next to it, it is a required field. If the form for this asset has fields that are unfamiliar to you, consult your design team or administrator.
 - Note the following conventions when naming the asset:
 - The name must contain 1 (minimum) to 64 (maximum) alphanumeric characters.
 - The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), and question mark (?).
 - The name can contain spaces (except for names of flex attributes), but cannot start with a space.
 - When creating a new flex asset, you may see a field (in the content entry form) that prompts you to select a parent or multiple parents for the new asset.

- Depending on how your developers configured the asset type, this field could be required or optional.
- You will either see **(S)** or **(M)** next to the parent selection field. **(S)** indicates that you can only select one parent; if this field is required, you must select one parent before saving the new asset. **(M)** indicates that you can select more than one parent; if this field is required, you must select at least one parent before saving the new asset.
- Depending on the design implemented by your developers, you will either select parent assets from drop-down lists or you will select parent assets from the tree, in which case it is a good idea to add them to your Active List first (see [“Working with the Active List,” on page 60](#)).
- (Optional) Set the asset’s language (locale designation) using the “Locale” drop-down list.

Note

This option appears only if at least one locale is enabled on your site. Contact your administrator to find out if your site supports localized assets.

For more information, see [“Working with Multilingual Assets,” on page 103](#).

- You may see one or more fields that allow you to visually select an image asset to be associated with the asset you are creating. In such cases, you will see a **Choose Visually** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more information on Image Picker, see [“Working with the Image Picker,” on page 100](#).
- You may see one or more fields that allow you to visually select a date (such as a post date, release date, and so on) in addition to the standard text box. In such cases, you will see a **Date Picker** (little calendar) icon next to the field. Clicking the icon invokes the Date Picker attribute editor; for more information on Date Picker, see [“Working with the Date Picker,” on page 102](#).

9. Click **Save**.

Content Server displays the asset in its “Inspect” form, showing a summary of the asset. If you duplicated any information that must be unique, Content Server displays an error message. Click the **Back** button in your browser to return to the form and edit the appropriate field.

10. (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 165](#).

11. (Optional) If you want to see how the asset would look if it were published, you can preview it. To preview an asset, click **Preview** in the action bar at the top of the asset’s “Inspect” form. A new window will open and display the asset in its rendered form.

Note

For the preview function to work, the asset must have a template assigned to it in the **Template** field.

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.

To copy an asset

1. Find the asset you want to copy:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to copy.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

2. In the search results list, navigate to the asset you want to copy and click its **Inspect** icon. Content Server displays the asset in its “Inspect” form.
3. In the asset’s “Inspect” form, select **Copy via “New Asset Type”** from the “more...” drop-down list.

Note

If **Copy via “New Asset Type”** is not listed as an option, you do not have the permissions to copy the asset; stop here. If you have questions about your permissions, contact your CS administrator.

4. If the “Choose Assignees” screen (at the right) is not displayed, it means that your asset is either not assigned to a workflow or is assigned to a workflow that does not require choosing assignees. Proceed to [step 5](#). Otherwise, continue with this step.

Choose Assignees

The workflow associated with this asset requires you to select assignees. Select at least one user from each role.

Cancel Set Assignees

Workflow Process: BF: Normal Article Process

Assignees:

Role	Users
* Author:	<div> <div>editor</div> <div>firstsite</div> <div>fwadmin</div> <div>user_author</div> </div>

Cancel Set Assignees

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

To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user. If you need information about workflow, see [Chapter 5](#), “[Workflow](#).”

- b. Click **Set Assignees**.

5. A form containing the fields and values of the asset you copied appears. Edit the field values to create your new asset. If a field has an asterisk (*) next to it, it is a required field. If the form for this asset has fields that are unfamiliar to you, consult your site developer or administrator.
 - Note the following conventions when naming the asset:
 - The name must contain 1 (minimum) to 64 (maximum) alphanumeric characters.
 - The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), and question mark (?).
 - The name can contain spaces (except for names of flex attributes), but cannot start with a space.
 - When creating a new flex asset, you may see a field (in the content-entry form) that prompts you to select a parent or multiple parents for the new asset.
 - Depending on how your developers configured the asset type, this field could be required or optional.
 - You will either see **(S)** or **(M)** next to the parent selection field. **(S)** indicates that you can only select one parent; if this field is required, you must select one parent before saving the new asset. **(M)** indicates that you can select more than one parent; if this field is required, you must select at least one parent before saving the new asset.
 - Depending on the design implemented by your developers, you will either select parent assets from drop-down lists or you will select parent assets from the tree, in which case it is a good idea to add them to your Active List first (see [“Working with the Active List,” on page 60](#)).
 - (Optional) Set or change the new asset’s language (locale designation) using the “Locale” drop-down list.

Note

This option appears only if at least one locale is enabled on your site. Contact your administrator to find out if your site supports localized assets.

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 [“Working with Multilingual Assets,” on page 103](#).

- You may see one or more fields that allow you to visually select an image asset to be associated with the asset you are creating. In such cases, you will see a **Choose Visually** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more information on Image Picker, see [“Working with the Image Picker,” on page 100](#).
- You may see one or more fields that allow you to visually select a date (such as a post date, release date, and so on) in addition to the standard text box. In such cases, you will see a **Date Picker** (little calendar) icon next to the field. Clicking

the icon invokes the Date Picker attribute editor; for more information on Date Picker, see [“Working with the Date Picker,” on page 102](#).

6. Click **Save**.

Content Server displays a summary of the asset. If you duplicated any information that must be unique, Content Server displays an error message. Click the **Back** button on your browser to return to the form and edit the appropriate field.

7. (Optional) If the asset is not preassigned to workflow and you want to use the workflow feature, you can assign the asset to a workflow as described in the section [“Assigning an Asset to a Workflow,” on page 165](#).

8. (Optional) If you want to see how the asset would look if it were published, you can preview it. To preview an asset, click **Preview** in the action bar at the top of the asset’s “Inspect” form. A new window will open and display the asset in its rendered form.

Note

For the preview function to work, the asset must have a template assigned to it in the **Template** field.

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 ZIP archive (`csdesktop.zip`) and launch the `setup.exe` file.

Note that the CS-Desktop client does not support locale-related functionality, such as setting an asset’s locale, or creating a translation. To perform such functions, use the Advanced interface.

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 ZIP archive (`CSDoclink.zip`) and launch the `setup.exe` file.

Note that the CS-DocLink client does not support locale-related functionality, such as setting an asset’s locale, or creating a translation. To perform such functions, use the Advanced interface.

Finding Assets

You can use Content Server's search function to find assets and add them to your Active List for later retrieval.

Search Basics

Here are some general search characteristics:

- There are two kinds of searches: simple and advanced.
- The simple search form has a link to the advanced form; the advanced form has a link back to the simple form.
- For both kinds of searches, results are based on all criteria being satisfied.
- Both the simple and advanced search forms provide a total count of the number of instances of the specified asset type in the site.
- If you click the **Search** button without specifying any criteria, all instances of the selected asset type (up to 1000) are retrieved and displayed 20 per page, which is the default for the **Show up to *nn* items per page** drop-down field. If your search results exceed 1000, refine your search criteria.
- A text string search means that all instances of the asset that contain the specified search string in the selected field will be returned in the search results list.
- You can use the percent sign (%) in your search criteria as a wildcard character.
- Searches can be case-sensitive, depending on the search engine used and its configuration.
- By default, Content Server uses its own SQL-based database search mechanisms. Your site, however, might be set up to use a search engine. Check with your system administrator to determine whether a search engine is in use. Consider the following when using the SQL default search mechanism:
 - Do not use phrases in the search string. Phrases are treated as a series of independent words delimited by space characters, and all records which match any of the words are retrieved.
 - Do not use quotation marks in the search string. Quotation marks are treated as a character. For example, a search on "John Doe" finds only John Doe in quotation marks.
 - Commas are not interpreted as characters (basic assets only). For example, a search on logo, banner finds occurrences of the word logo and occurrences of the word banner.
- If you are using the Verity search engine, keep in mind that its syntax is different from the SQL syntax used by Content Server. For more information, consult your Verity documentation.

Note

Searches described in this section are based on assets — the results are specific to an asset type. You can perform searches across asset types by running workflow reports. For more information, see the section [“Working with Workflow Reports,” on page 195](#).

Running a Simple Search

To run a simple search

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**. Content Server displays a list of searchable asset types.
4. Click **Find** for the desired asset type to display the simple search form.

The "Simple Search" form for the desired asset type ("Article" in this example) appears as follows:

Search for Articles

Search Name for

Search Options:

Show up to 20 items per page

Sort results by Name

[advanced search](#)

Total Articles: 545

5. Enter the desired search criteria:
 - a. In the "Search" drop-down list, select the attribute you want to search.
 - b. In the **for** field, enter the text you want to search for (you can also leave this field blank).
 - c. Select the number of matching assets to display per page (the incremental range is 10-300).
 - d. Select a category by which to sort the results.

If you enter no criteria, the search will retrieve all instances of the asset type (up to 1000) and display them at 20 to a page in the default sort order.

6. Click **Search**.

The search results appear beneath the search form in the workspace.

Items 1 to 20 of 545 sorted by "Name" ([Save This Search](#))

[Next 20](#)

Filter : all ([Edit This Search](#))

	Name	Locale	Headline	Status	Modified	
	100-A637-2001Mar9		100 Blank Passports Still Missing in D.C.	Received	Mar 18, 2001	<input type="checkbox"/>
	AMD-A580-2001Mar9		AMD Completes Sale of Communications Business	Received	Mar 18, 2001	<input type="checkbox"/>
	ASP-A56-2001Mar9		An Asp Opportunity for Java Developers	Received	Mar 18, 2001	<input type="checkbox"/>
	About Burlington Financial		About Burlington Financial	Created	Jan 23, 2002	<input type="checkbox"/>
	Abused-A63-2001Mar9		Abused Girls Have More Severe Reactions to Stress As Adults	Received	Mar 18, 2001	<input type="checkbox"/>

Each asset returned in the search results list has a row of icons to its left. The icons are, in order of appearance, **Preview**, **Inspect**, **Edit**, and **Delete**. They work just like the commands in the action bar of an asset's "Inspect" form.

Text at the left above the search results list tells you the range of the currently displayed assets out of the total number of assets that match your search criteria. You can display more results by clicking the **Previous** and **Next** hyperlinks at the right, above the results.

Notice the line of numbers at the bottom left of each page of search results:

Show [10](#) [20](#) [30](#) [50](#) [100](#) [200](#) [300](#) items per page

Click one of the numbers to rerun the search and display the selected number of assets per page.

7. To save your search results, see the section "[Saving Search Results](#)," on page 76.
8. To save your search criteria, see the section "[Saving Search Criteria](#)," on page 76.

Running an Advanced Search on Basic Assets

Consult your CS administrator to find out which asset types on your site are using the basic asset model.

To run an advanced search on basic assets

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**. Content Server displays a list of searchable asset types.
4. Click **Advanced search** next to the asset type to open the advanced search form.

The advanced form presents additional search criteria that you can use to narrow down the scope of your search.

Keep in mind that search forms are asset type-dependent. If you have any questions about specific asset type search forms, ask your administrator.

In this example, the “Advanced Search” form for the “Article” asset is shown:

Advanced Search for Articles

Name contains:

Template is:

Status is:

Source is:

Subtype is:

Category is:

Headline contains:

Abstract contains:

Body contains:

Byline contains:

Keywords contain:

ID is:

Modified after:

Modified before:

Modified by:

Show up to items per page

Sort results by

[simple search](#)

Total Articles: 545

5. Enter the desired search criteria. Note that the available criteria vary by asset type.
If you enter no criteria, the search will retrieve all instances of the asset type (up to 1000) and display them at 20 per page in the default sort order.
6. Click **Search**.

The search results appear beneath the search form in the workspace.

Items 1 to 20 of 545 sorted by "Name" ([Save This Search](#)) [Next 20](#) ▶

Filter : all ([Edit This Search](#))

	Name	Locale	Headline	Status	Modified	
   	100-A637-2001Mar9		100 Blank Passports Still Missing in D.C.	Received	Mar 18, 2001	<input type="checkbox"/>
   	AMD-A580-2001Mar9		AMD Completes Sale of Communications Business	Received	Mar 18, 2001	<input type="checkbox"/>
   	ASP-A56-2001Mar9		An Asp Opportunity for Java Developers	Received	Mar 18, 2001	<input type="checkbox"/>
   	About Burlington Financial		About Burlington Financial	Created	Jan 23, 2002	<input type="checkbox"/>
   	Abused-A63-2001Mar9		Abused Girls Have More Severe Reactions to Stress As Adults	Received	Mar 18, 2001	<input type="checkbox"/>

Each asset returned in the search results list has a row of icons to its left. The icons are, in order of appearance, **Preview**, **Inspect**, **Edit**, and **Delete**. They work just like and invoke the same functions as the commands in the action bar of an asset’s “Inspect” form.

The text at the left above the result list tells you the range currently displayed of the total number of assets that match the search criteria. You can display more results by clicking the **Previous** and **Next** hyperlinks at the right, above the results.

Notice the line of numbers at the bottom left of each search results page:

Show [10](#) [20](#) [30](#) [50](#) [100](#) [200](#) [300](#) items per page

Click one of the numbers to rerun the search and display the selected number of assets per page.

7. To save your search results, see the section “[Saving Search Results](#),” on page 76.
8. To save your search criteria, see the section “[Saving Search Criteria](#),” on page 76.

Running an Advanced Search on Flex Assets

If you are using flex assets and have the right permissions, advanced searches on qualifying flex assets allow you to search for specific attributes and their values. For example, with the Burlington Financial sample site installed, you can search “Article” assets for specific authors and headlines. Consult your administrator to find out if flex assets are in use on your site.

To run an advanced asset search on flex assets

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**. Content Server displays a list of searchable asset types.
4. Click **Advanced search** next to the asset type of the asset you want to find. Content Server displays the “Advanced Search” form.

Advanced Search for Products

Name contains:

Product Definition is:

Description contains:

Status is:

ID is:

Format: yyyy-mm-dd hh:mi (24 hour clock)

Modified after:

Modified before:

Modified by:

Show up to items per page

Sort results by

[simple search](#)

The advanced form presents additional search criteria that you can use to narrow down the scope of your search.

Keep in mind that search forms are asset type-dependent. If you have any questions about specific asset type search forms, ask your administrator.

5. Do one of the following:

- If you do not want to search by specific attributes, enter the desired search criteria and click **Search**; then proceed to [step 8 on page 75](#).

If you enter no criteria, the search will retrieve all instances of the asset type (up to 1000) and display them at 20 per page in the default sort order.

- If you want to search by specific attributes and/or specific attribute values, click **Select Attributes** to open the “Select Attributes” form:

Advanced Search for Products

Filter : OrderBy: name ResultLimit : 20

Available

- InstitutionalContract
- InternalItemID
- MinimumInitialInvestment
- MorningStarRating
- PFMngStrategy
- Prospectus
- Return
- Symbol

Selected

- MinimumBalance
- Name

Search Select Attribute Values [simple search](#)

6. Select assets in the **Available** list box and click the arrow button to move them to the **Selected** list box. You can choose multiple assets by **Ctrl-clicking** the assets you want to include. You can also select a range of assets by **Shift-clicking** the first and last assets to be included.

7. Do one of the following:

- If you want to search by specific attributes, click **Search** and proceed to [step 8](#).
- If you want to search by specific attribute values, click **Select Attribute Values** to specify the desired search criteria. Content Server displays a form allowing you to enter specific attribute values.

Advanced Search for Products

Filter : OrderBy: name ResultLimit : 20

MinimumBalance is:

Name is:

[simple search](#)

Note

Searching for attribute values requires that a search engine be installed on your CS system. If a search engine is not present, Content Server displays an error message when you try to perform an attribute value search. If you have questions, contact your CS administrator.













For a value-based search, enter specific attribute values to search for and click **Search**:

8. The search results appear beneath the search form in the workspace.

Items 1 to 20 of 30 ([Save This Search](#))

[Next 10](#) ▶

Filter : Name contains Standard Iron : MinimumBalance contains 3500 ([Edit This Search](#))

	Name	Locale	Description	Status	Modified	Type	
   	Communications			Edited	Aug 5, 2001 21:51	PTypeFund	<input type="checkbox"/>
   	Convertible Bond			Edited	Aug 9, 2001 11:24	PTypeFund	<input type="checkbox"/>
   	DJ Index			Edited	Aug 9, 2001 11:21	PTypeFund	<input type="checkbox"/>

Each asset returned in the search results list has a row of icons to its left. The icons are, in order of appearance, **Preview**, **Inspect**, **Edit**, and **Delete**. They work just like and invoke the same functions as the commands in the action bar of an asset's "Inspect" form.

The text at the left above the result list tells you the range currently displayed of the total number of assets that match the search criteria. You can display more results by clicking the **Previous** and **Next** hyperlinks at the right, above the results.

Notice the line of numbers at the bottom left of each search results page:

Show [10](#) [20](#) [30](#) [50](#) [100](#) [200](#) [300](#) items per page

Click one of the numbers to rerun the search and display the selected number of assets per page.

9. To save your search results, see the section "[Saving Search Results](#)," on page 76.
10. To save your search criteria, see the section "[Saving Search Criteria](#)," on page 76.

Saving Search Results

When you run a successful search, you can preserve some or all of the results for future use by adding them to your Active List. This way, you do not have to run the search again or page back in the browser.

To save search results

1. Run a simple or advanced search, as described earlier in this section.
2. On the first page of results, choose the assets you want to preserve by selecting the check box to the right.
3. When you have selected all the assets you want to preserve, click **Add to My Active List**.

Your Active List appears, showing the assets you added. The assets you added also appear in the “Active List” tab in the tree pane in the left portion of the CS interface.

4. To save additional assets, do the following:
 - a. Click your browser’s **Back** button to return to the search results page from which you selected the items.
 - b. Choose the assets you want to preserve, by selecting the check box to the right.
 - c. Click **Add to My Active List**.
 - d. Repeat [steps a – c](#) until you have saved all of the desired assets.
5. Click **Next** to continue to the next page of the search results.

If you click the browser’s **Forward** button after returning to the search results, you go back to your Active List.

Saving Search Criteria

When you run a search, you have the option of saving the search criteria you used and making the saved search available to other users. Saving searches means you can run them with a single click without having to re-enter the criteria each time.

To save a search

1. After running a search, click **Save This Search**. The “Save Search” form is displayed:

Save Search:

*Name:

Sharing Search Criteria:

☒ Private

☐ Users of the following roles:

Analyst

Approver

ArtworkAuthor

ArtworkEditor

Current Site: BurlingtonFinancial

Share to Other Sites:

Available	Selected
FirstSite1	

--> <--

Created by: fwadmin

Filter String: Filter : Headline contains 'Stocks' ([Edit This Search](#))

2. Fill in the form as follows:
 - a. Enter a name for the search. The name that you specify here will appear as a hyperlink in the **Saved Searches** section of the “Search” form.
 - b. Indicate whether you want this search to be private or shared with users of certain roles. If you decide to share your search, select the roles that you want to share it with. You can choose multiple roles by **Ctrl-clicking** the roles you want to include. You can also select a range of roles by **Shift-clicking** the first and last roles to be included. All searches are **private** by default.
 - c. If you want your search to be available on other sites you use, select the desired sites and click the right arrow to move sites from the **Available** list box to the **Selected** list box.

Note

To be able to share your saved search to other sites you are using, the asset type being searched for must be enabled for each of the sites. You must also have a role assigned in each site. If either of these conditions is not met, the **Share to Other Sites** field does not appear.

- d. If you want to review or edit the search criteria, click the **Edit This Search** hyperlink. To save the revised search, you must run the search again and click **Save This Search** to return to the “Save Search” form.
3. Click **Save**.

Running Saved Searches

To run a saved search

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**. Content Server displays a list of searchable asset types.
4. Scroll down to the **Saved Searches** section of the form.
5. In the list of saved searches, locate the search you want to run.

Saved Searches

Please select the Saved Search that you want to execute

	Name	Asset Type	Shared
  	My Saved Search	Article	private

6. Click the search name or the corresponding **Inspect** icon to execute the search.

Editing Saved Searches

To edit a saved search

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**. Content Server displays a list of searchable asset types.
4. Scroll down to the **Saved Searches** section of the form.
5. Locate the search you want to edit in the list of saved searches:

Saved Searches

Please select the Saved Search that you want to execute

	Name	Asset Type	Shared
  	My Saved Search	Article	private

6. Click the **Edit** icon to open the saved search for editing.
7. Make your changes to the search parameters and click **Search**.
8. Save the new search by following the steps in "[Saving Search Criteria](#)," on page 76.

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 Advanced interface
- Content Server's Dashboard interface (described in the *Content Server Dashboard Interface User's Guide*)
- The CS-Desktop and CS-DocLink Windows clients
- In an Internet browser window, using the InSite interface

Note that you must have the right permissions to edit assets.

Editing Assets in the Advanced Interface

To edit an asset in the Advanced interface

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to edit:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

4. In the search results list, navigate to the asset you want to edit and click its **Edit** icon. Content Server displays the asset's "Edit" form.
5. Make your changes to the asset. Note the following when editing the asset:
 - You may see one or more fields that allow you to visually select an image asset to be associated with the asset you are editing. In such cases, you will see a **Choose Visually** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more information on Image Picker, see "[Working with the Image Picker](#)," on page 100.
For more information on associating assets, see "[Working with Asset Associations](#)," on page 122.
 - You may see one or more fields that allow you to visually select a date (such as a post date, release date, and so on) in addition to the standard text box. In such cases, you will see a **Date Picker** (little calendar) icon next to the field. Clicking the icon invokes the Date Picker attribute editor; for more information on Date Picker, see "[Working with the Date Picker](#)," on page 102.

6. Click **Save** to save your changes.

Content Server displays the asset's "Inspect" form showing the changes. If you click **Cancel** instead, the asset appears unchanged in the "Inspect" form.

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

Note

For preview to work, the asset must have a template assigned to it in the **Template** field.

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 machine. For complete information about using CS-Desktop, consult the CS-Desktop Help file accessible from the CS-Desktop toolbar inside Microsoft Word.

Note

If you use Content Server's Dashboard or Advanced interfaces to edit an asset that was created in CS-Desktop, the link between that asset and CS-Desktop will be irreversibly severed, and you will no longer be able to edit that asset in CS-Desktop. Content Server warns you of this fact when you attempt to edit a CS-Desktop asset in the Dashboard or Advanced interfaces. A link to the CS-Desktop client installer is also provided at that time.

Note that the CS-Desktop client does not support locale-related functionality, such as setting an asset's locale, or creating a translation. To perform such functions, use the Dashboard or Advanced interfaces.

Editing Assets in CS-DocLink

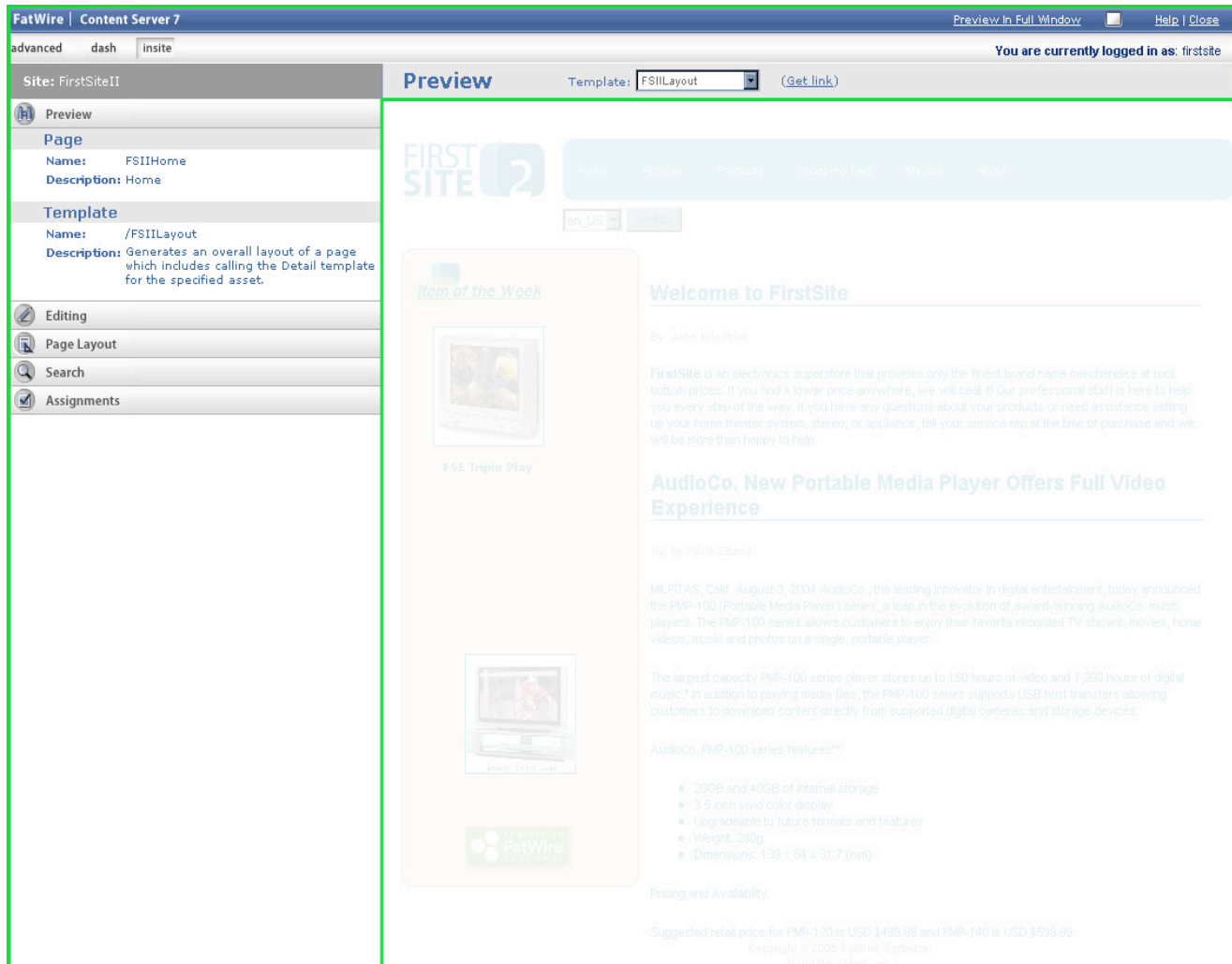
When you install the CS-DocLink client software, a "CS-DocLink" node is added to the tree in the left pane of the Windows Explorer window. To edit an asset that was created from a binary file, you navigate to the asset in the CS-DocLink hierarchy as if you were browsing your local file system and drag it 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.

Note that the CS-DocLink client does not support locale-related functionality, such as setting an asset's locale, or creating a translation. To perform such functions, use the Dashboard or Advanced interfaces.

Working with the InSite Interface

Business users who do not ordinarily work in Content Server's interface, 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.
- Previous releases of Content Server contain a drag-and-drop templating feature called InSite Templating. In this release, InSite Templating has been integrated into the InSite interface as the “Page Layout” mode.

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 83](#).
- **Editing** – allows you to edit content directly on a rendered page. For more information, see [“Editing Assets in the InSite Interface,” on page 86](#).
- **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 88](#).

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 94](#).
- **Assignments** – allows you to finish your workflow assignments. For instructions, see [“Finishing Your Workflow Assignments Using the InSite Interface,” on page 95](#).

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 page it is associated with, 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 Advanced interface to search for and preview the desired asset.
- Drill down the site plan in the Advanced interface to find and preview the desired asset.
- 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 necessary permissions. For more information, see [“Obtaining the InSite URL for an Asset,” on page 97](#).

When you access the InSite URL, you will be asked 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. The procedures in this section assume 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.

Note

You can only preview an asset that has a template assigned to it.

To preview an asset

1. Log in to the site you want to work with.
2. Find the desired asset. Do the following:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see “[Finding Assets](#),” on page 69.
3. Preview the asset. In the list of search results, navigate to the asset you want to work with and click its **Preview** (binoculars) icon.

Content Server opens a new browser window and displays the desired 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 e-docs 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.

4. (Optional) If you would like to see how the asset would look when rendered by a template other than the pre-assigned one, 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. 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 86](#).
 - 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 88](#).
 - Find other assets to work on in the InSite interface. For instructions, see [“Searching for Assets Using the InSite Interface,” on page 94](#).
 - Finish your workflow assignments. For instructions, see [“Finishing Your Workflow Assignments Using the InSite Interface,” on page 95](#).
 - Obtain the InSite URL for the asset. For instructions, see [“Obtaining the InSite URL for an Asset,” on page 97](#).

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 83.
3. In the InSite pane, click **Editing**. The InSite interface switches to the “Editing” mode.
 - If you see an **Edit** icon or button next to one or more fields, as shown below, the asset is editable in the InSite interface. Proceed to the next step.
 - If you do not see any **Edit** icons or buttons, stop here. The asset’s template does not support InSite Editing. If you have any questions, consult your developers.

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

Click the **Edit** (pencil) icon to edit the field.

The dotted outline and **View** (eyeball) icon indicate the field is being edited. When finished, click the **View** icon.

The InSite pane shows which field and asset are being edited, and which assets you have edited so far.

Click the **Edit** button to edit the field in a WYSIWYG editor.

When you are finished 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 the **Edit** icon or button next to an editable field to make changes to the contents of the field. Note the following:
 - The **Edit** (pencil) icon indicates a simple text field. When you click the **Edit** icon, it changes to the **View** (eyeball) icon, and the field is enclosed in a dotted line, indicating that you can make your edits to the text within the box. 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 or eWebEditPro. 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 WYSIWYG Editors,” on page 98](#) for more information.)

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:

- To make your job easier, toggle off the InSite pane to maximize the visible area of the page. Toggle the pane back on when you are ready to save 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 **Edit** icon (or button) to indicate that the field cannot currently be edited.
- When you are finished editing a field, click its **View** icon (or button) 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 **Apply** 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 edit another asset using the InSite interface, find the asset by performing the steps in [“Searching for Assets Using the InSite Interface,” on page 94](#), 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 **Apply** 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

The screenshot displays the FatWire Content Server 7.0 Advanced Interface in "Page Layout" mode for the "FirstSite II" site. The interface is divided into several sections:

- Top Bar:** Includes "FatWire | Content Server 7", "advanced", "dash", "insite" tabs, and a "Preview In Full Window" button.
- Left Sidebar:** Contains navigation links: "Site: FirstSiteII", "Page Layout", "Search", "Preview", "Editing", "Search", and "Assignments".
- Main Content Area:** Shows the "Page Layout" for the "FirstSite II" template. It includes a header with "FIRST SITE 2" and navigation links: "Home", "Articles", "Products", "Shopping Cart", "My Site", and "About". Below the header is a language selector "en_US" and a "Switch" button.
- Search Results:** A pane on the left shows search results for "Find Content" containing assets like "FSII AudioCo. America Announces H300 series" and "FSII AudioCo. NewMediaPlayerOffersVideo".
- Page Slots:** The main content area features several slots. One slot is occupied by an "Item of the Week" asset, and another slot is empty, labeled "This slot is empty. You can drop an asset into it."

Annotations with arrows point to the "Apply" button in the left sidebar, the search results pane, and the empty slot in the main content area.

This section covers 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 83.
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 88](#).
- 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 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 **Go**. The results of your search appear in the “Search Results” area of the pane:

The screenshot shows the InSite interface with the 'Page Layout' mode selected. Below the 'Page Layout' button are 'Apply' and 'Cancel' buttons. A 'Done' button is also visible. The 'Search' section contains three input fields: 'Type' (set to 'Find Content'), 'Containing' (set to 'FSII'), and 'Template' (set to 'FSIIDetail'). A 'Go' button is located below these fields. The 'Search results' section displays a table with two columns: 'Name' and 'Type'. The table lists five assets, all of which are of type 'Content_C'. The first asset is 'FSII AudioCo, America Announces H300 series'. The second is 'FSII AudioCo, NewMediaPlayerOffersVideo'. The third is 'FSIIAbout'. The fourth is 'FSIIAudioCoFirstUnderWaterMP3Player'. The fifth is 'FSIIFSEIntroducesDVDRRecorder'. At the bottom of the table are navigation links: '< prev.' and 'next >'.

Name	Type
FSII AudioCo, America Announces H300 series	Content_C
FSII AudioCo, NewMediaPlayerOffersVideo	Content_C
FSIIAbout	Content_C
FSIIAudioCoFirstUnderWaterMP3Player	Content_C
FSIIFSEIntroducesDVDRRecorder	Content_C

- e. In the list of search results, navigate to the desired asset. The list shows five assets at a time, sorted alphabetically. Do the following:
- 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 screenshot displays the FatWire InSite interface. On the left, a 'Page Layout' sidebar contains a 'Search' section with filters for 'Type' (Find Content), 'Containing' (FSII), and 'Template' (FSIIDetail). Below the filters is a 'Search results' table with columns 'Name' and 'Type'. The table lists five assets, with 'FSIIFSEIntroducesDVDRecorder' highlighted in blue and circled in red. Below the table are buttons for 'Preview', 'Editing', 'Search', and 'Assignments'. On the right, the main content area shows a rendered preview of the selected asset, titled 'FS Electronics Introduces First DVD Recorder'. The preview includes a header with the 'FIRST SITE 2' logo, a navigation bar with links like 'Home', 'Articles', 'Products', 'Shopping Cart', 'My Site', and 'About', and a main text area with an article about a new DVD recorder. A 'Powered by FatWire' logo is visible at the bottom of the preview area.

Name	Type
FSII AudioCo. America Announces H300 series	Content_C
FSII AudioCo.NewMediaPlayerOffersVideo	Content_C
FSIIAbout	Content_C
FSIIAudioCoFirstUnderWaterMP3Player	Content_C
FSIIFSEIntroducesDVDRecorder	Content_C

FS Electronics Introduces First DVD Recorder

By:

INDIANAPOLIS, IN (September 9, 2004) - FS Electronics' new recordable DVD home theater system lets consumers enjoy the latest audio and video technologies with one convenient, high-performance package. The system completes the home theater experience, whether it's listening to music on CDs and DVD-Audio discs, watching the latest blockbuster movies on DVD, or recording favorite TV programs. The unit's DVD recorder offers multi-format playback (DVD video, DVD-Audio, DVD-RAM, DVD-R1, CD, CD-R/RW2 and MP3).

The SC-HT1500 is currently available. It has a manufacturer's suggested retail price of \$999.95.

The power of recordable DVD enables users to record TV programs or home videos onto DVD-RAM and DVD-R discs, as well as onto the unit's 80GB* hard disk drive - up to 142 hours in the EP3 mode. Users can also transfer recordings from a camcorder or digital still camera onto DVD-R or DVD-RAM discs, preserving precious family videos and photos.

Other features include:

- High-speed recording from the hard disk to DVD-RAM and DVD-R discs
- Direct Navigator displays thumbnail scenes of recorded content
- Time Slip feature: allows viewers to replay a scene recorded 30 seconds earlier without disrupting the recording process, simply by touching a button on the remote.
- One-touch recording
- Playlist Playback
- Progressive scan4 DVD video playback
- Dialogue Enhancer

Copyright © 2005 FatWire Software
Validate: [html](#) [css](#)

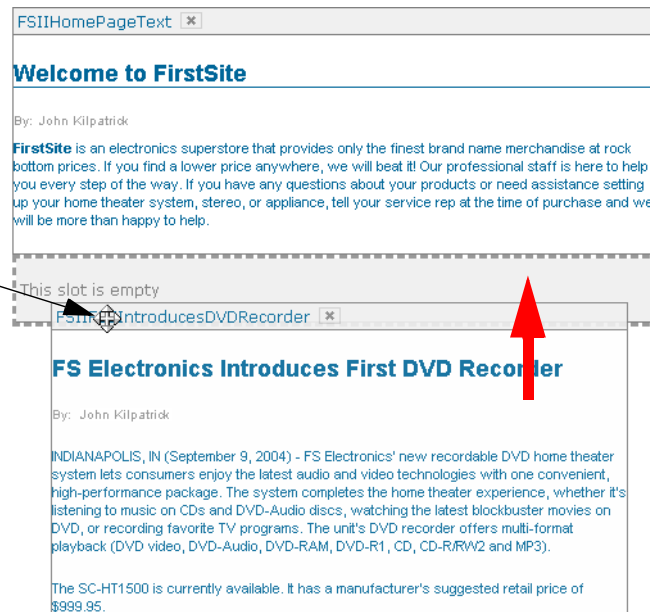
The asset is displayed in its rendered form as a floating object that you can drag and drop into a slot on the page.

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.

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

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



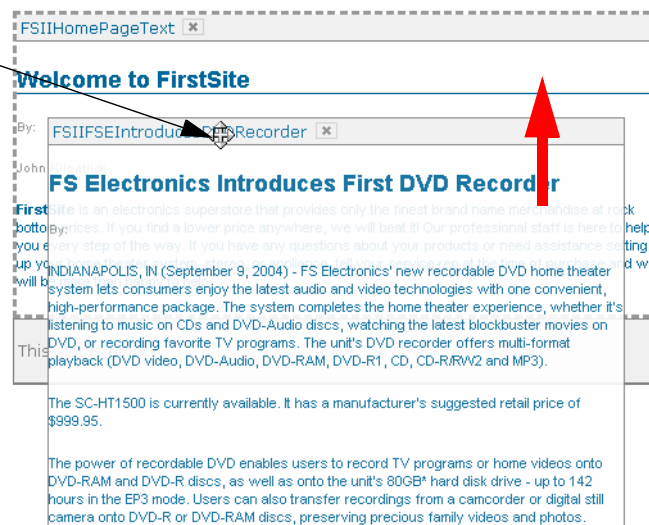
2. Drag the asset's title bar over the slot.

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

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

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

(Your cursor changes to a multi-directional arrow which indicates 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 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.

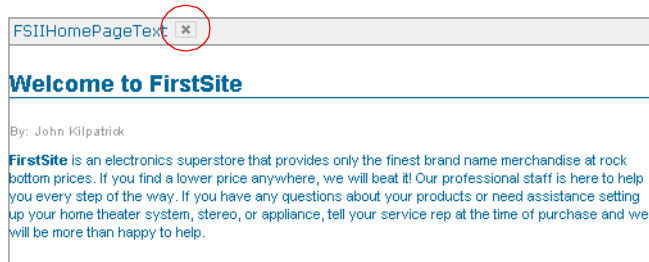
7. In the InSite pane, click **Apply** to commit your changes to the CS database.
If you click **Cancel**, your changes will be discarded and the page redisplayed in its unmodified state.
Content Server refreshes the page, showing your changes.

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 83.
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 88](#).
 - 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 **Apply** 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 89.

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 83.
3. In the InSite pane, click **Page Layout**.

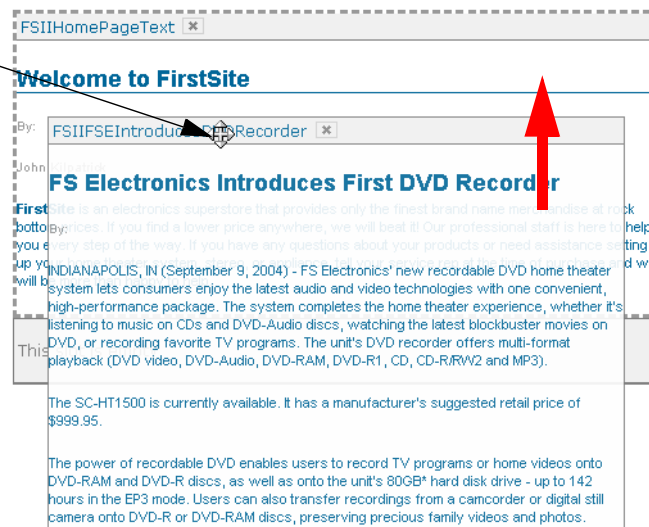
The InSite interface switches to the “Page Layout” mode.

- If the page supports slots, you will see occupied and/or empty slots, similar to the ones shown in the figure on [page 88](#).
- 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 **Apply** 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

This section shows you how to search for assets from within the InSite interface. Once you find the desired asset, select it to open it in the InSite interface.

To search for assets from within the InSite interface

1. (Optional) If you have not already done so, save the changes you have made to the asset you are working on by clicking **Apply** in the InSite pane.
2. In the InSite pane, click **Search** to expand the **Search** section.
3. In the **Search** section of the pane, do the following:
 - a. In the “Type” drop-down list, select the type of asset you want to find.
 - b. In the **Containing** field, enter your search criteria.
 - c. Click **Go**.

The results of your search appear underneath the fields.

Name	Type
FSII AudioCo. America Announces H300 series	Content_C
FSII AudioCo.NewMediaPlayerOffersVideo	Content_C
FSIIAbout	Content_C
FSIIAudioCoFirstUnderWaterMP3Player	Content_C
FSIIFSEIntroducesDVDRRecorder	Content_C

[next >](#)

- Preview
- Editing
- Page Layout
- Assignments

4. In the list of search results, navigate to the desired asset. The list shows five assets at a time, sorted alphabetically. Do the following:
 - Click **Next** to view the next page of results.
 - Click **Prev** to view the previous page of results.
5. 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](#)

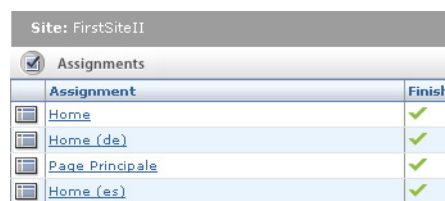
Finishing Your Workflow Assignments Using the InSite Interface

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 5](#), “[Workflow](#).”)

To finish a workflow assignment using the InSite interface

1. (Optional) If you have not already done so, save the changes you have made to the asset you are working on by clicking **Apply** in the InSite pane.
2. In the InSite pane, click **Assignments** to expand the **Assignments** section.

The InSite pane displays a list of your workflow assignments in the current site.



Assignment	Finish
Home	✓
Home (de)	✓
Page Principale	✓
Home (es)	✓

3. (Optional) If you have not yet completed the necessary work on the asset you for which you want to complete the assignment, do the following (otherwise, proceed to the next step):
 - 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 86 and “[Managing Page Content Using the InSite Interface](#),” on page 88, whichever is applicable.
 - c. Return to [step 2](#) of this procedure.
4. In the list of workflow assignments, locate the asset for which you want to finish the workflow assignment, and click its **Finish Assignment** (green check mark) icon.

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



Site: FirstSiteII

Assignments

FSII: Approval for Structure

Step:

☒ Send for Approval

☐ Return for Edit

Action Taken:

Checked for structure.
Looks good.

Action to Take:

Approve for publishing.

 Finish Assignment  Cancel

5. 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**.
6. (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:

Site: FirstSiteII

Assignments

Choose Assignees:
Please select at least one user from each role:

*Approver: Napoleon
firstsite

Apply Cancel

In such case, select at least one user for each displayed role, then click **Apply**.

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 6](#).

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 83](#).
2. In the InSite bar, click **Get Link**.
Content Server displays a confirmation message indicating the InSite URL for the asset 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

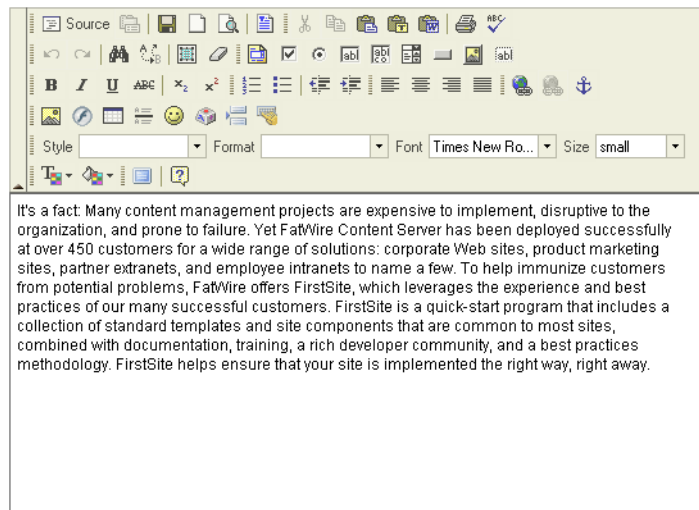
The recipient of the URL must hold a role that permits them to work with the asset and the InSite interface.

Working with WYSIWYG Editors

Content Server supports the use of third-party WYSIWYG (What You See Is What You Get) editors on most asset forms. The supported editors are FCKEditor, eWebEditPro, and RealObjects.

A WYSIWYG editor allows you to apply style characteristics such as bold, italics, and underlining, and closely mimics the text editing behavior of Microsoft Word. You can change font size and color, make bulleted lists, insert tables, images, and hyperlinked text. Your changes to the contents of the text field are instantly visible in the editor window. You can also use a WYSIWYG editor to edit fields in the InSite interface.

If your system is set up to use a WYSIWYG editor, the editor appears as part of the “New” and “Edit” asset forms, replacing the standard text box for each field that is WYSIWYG-enabled. The example below shows the body field of a “Content” asset, being edited in FCKEditor:



Note

Content Server ships with FCKEditor, which is the default attribute editor for WYSIWYG-enabled fields. Optionally, your developers may choose to install and configure a different editor, such as eWebEditPro or RealObjects. Consult your developers to find out which WYSIWYG editor is in use on your site.

For instructions on how to use a WYSIWYG editor, consult the editor’s documentation.

Note

If your WYSIWYG editor includes an **Upload Image** function, consult your CS administrator before using this function. An image uploaded in this manner is not an asset, and will not be mirror published when the asset that uploaded it is published to the delivery system.

Working with FCKEditor

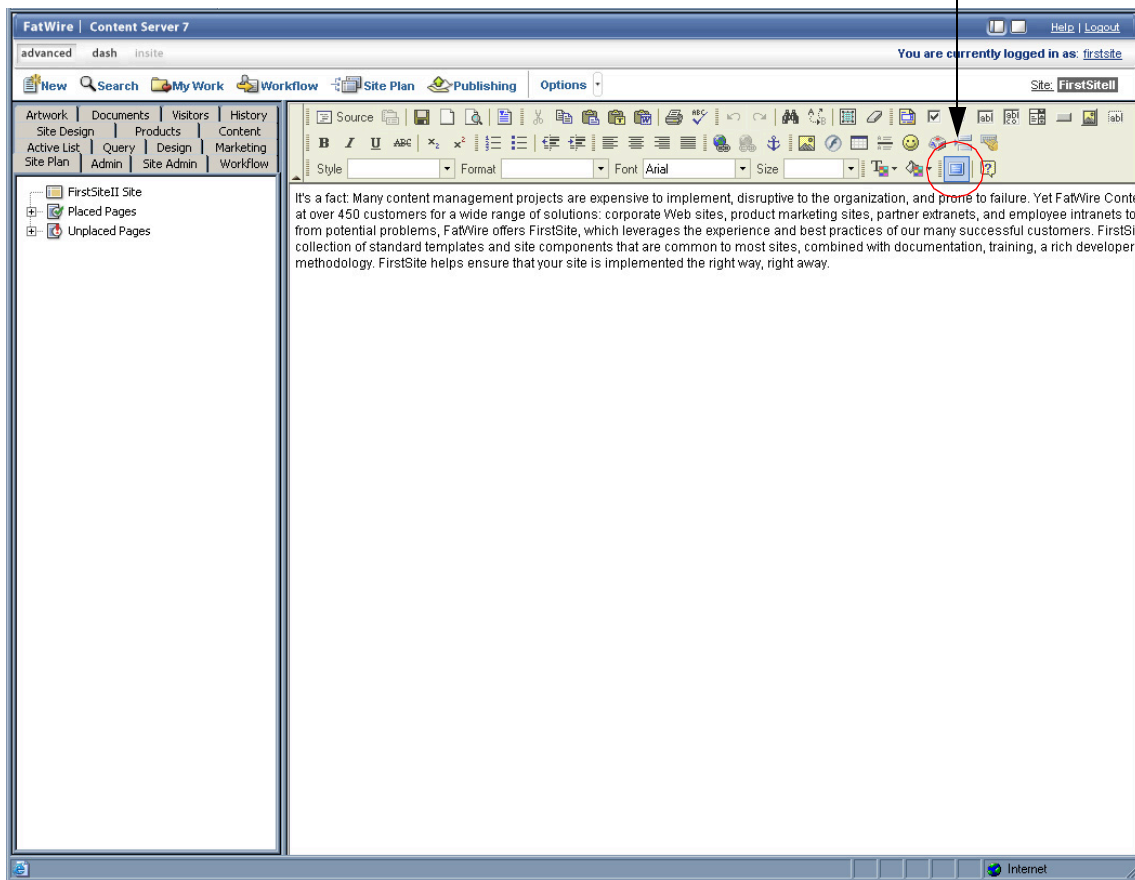
FCKEditor is a popular third-party WYSIWYG editor that ships bundled with Content Server as the default attribute editor for WYSIWYG-enabled fields.

FCKEditor allows you to apply a wide range of MS Word-style formatting to your content.

To work more comfortably, use the **Maximize** function to expand FCKEditor to fill your workspace.

Click **Maximize** to expand the FCKEditor window to fill the entire workspace.

To restore FCKEditor to its normal size, click **Maximize** again.



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

To find out more about FCKEditor and its capabilities, consult the FCKEditor documentation, available at <http://wiki.fckeditor.net>.

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

The asset type of the image assets displayed by Image Picker is determined by your site developers when the asset type of the parent asset is configured.

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 **Choose Visually**.



Content Server opens a pop-up window which displays the Image Picker:



By default, the Image Picker displays all assets of the asset type configured as associable with the parent asset type through the selected field. 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, and MIME type.

2. (Optional) If the pool of available images is large, you may choose to search for a specific image asset. To do so, enter one or more keywords describing the asset into the **Search** field at the top of the Image Picker window and click **Go**. Image Picker displays the images matching your search criteria.



3. Navigate to the desired image and click it.

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, that asset is replaced by the new asset you selected. A thumbnail of the corresponding image appears in the field you have edited.



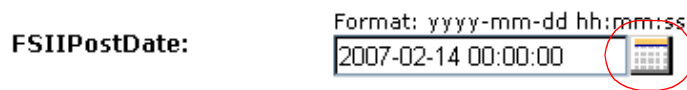
4. Click **Save** to save your changes to the parent asset.

Working with the Date Picker

When working with assets whose forms require you to enter a date (such as a post date, release date, and so on), you may encounter one or more fields that allow you to visually select a date using the Date Picker attribute editor, in addition to the standard text box. The Date Picker allows you to select a date using a calendar-like interface found in many personal information management (PIM) applications (for example, Microsoft Outlook). Perform the following steps to enter a date into an field using the Date Picker:

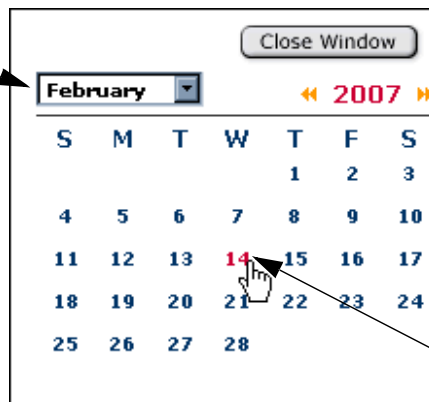
To enter a date using the Date Picker

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



Content Server opens the Date Picker pop-up window.

1. Select the **month** from the drop-down list.



2. Select the **year** using the left and right arrows.

3. Click the desired **day**. (Date Picker closes.)

2. In the Date Picker pop-up window, select the desired month, year, and day. 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.

Note

If the field you are editing is set up to accept a time, in addition to a date, the time will be reset to zero hours, zero minutes, and zero seconds, when you select a date using the Date Picker. You will have to enter the desired time manually, if required.

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

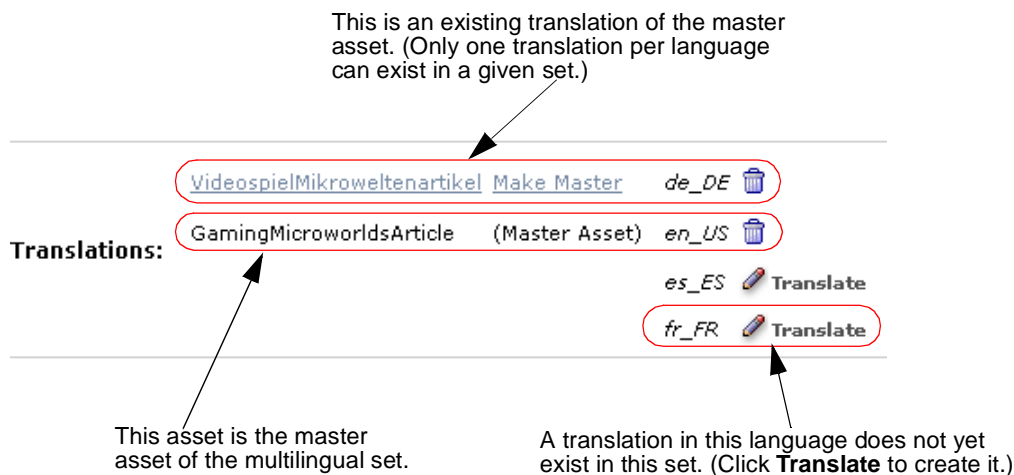
Working with Multilingual Assets

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 exist in multiple language versions, or **locales**.

If two or more locales are set up on your site, you can create translations of assets, in the languages available on your site. 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. The example below shows the **Translations** field of a typical “Article” asset:



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 3, on page 104](#) for information on how asset relationships are handled when you create translations of assets.

Table 3: 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.
Collections	When you create a translation of a “Collection” asset, the new “Collection” 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 “Collection” asset, replacing the member assets carried over from the old collection.
Static Lists Recommendations	When you create a new language version of a Static Lists recommendation, 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.
Dynamic Lists Recommendations	Since Dynamic Lists recommendations are populated by element code, they are not affected.
Related Items Recommendations	When an asset containing Related Items associations 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.
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 122.

Note

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

- You must have the appropriate permissions to work with multilingual assets. To find out more about your permissions, contact your CS administrator.
- 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.

This section contains the following procedures:

- [Setting or Changing an Asset's Locale Designation](#)
- [Creating a Translation of an Asset](#)
- [Examining the Available Translations of an Asset](#)
- [Deleting a Translation of an Asset](#)
- [Changing the Master Asset of a Multilingual Set](#)

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 4](#) of the next section, “[Creating a Translation of an Asset](#),” on page 106.

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 divide the asset's locale into specific flavors, (such as dividing French into Canadian French and Belgian French) you can update your assets to use the new locale designations.

Note

Keep the following in mind:

- You can only assign locales that have been enabled on your site by the CS administrator. If no locales are enabled on your site, the “Locale” drop-down list will not be displayed in the “Edit” form.
- You cannot assign the same locale to more than one member of a given multilingual set.

To set or change an asset's locale designation

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose locale you want to set or change and open its “Edit” form:

- a. In the button bar, click **Search**.
- b. In the “Search” form, click the asset type of the asset you want to find.
- c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

- d. Scroll to the desired asset and click the asset’s **Edit** icon.

Content Server displays the asset’s “Edit” form.

4. In the “Locale” drop-down list, select the desired locale for the asset.
5. Click **Save**.

Content Server redisplay the translation asset in the “Inspect” form, showing the new locale designation in the **Locale** field.

Creating a Translation of an Asset

Note

Before performing the steps in this procedure, note the following:

- 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 **Locale** field of the asset’s “Inspect” form and is usually 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 105, 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.
- Have the translated content ready before you create the translation asset.

To create a translation of an asset

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset for which you want to create a translation and open its “Inspect” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section “[Finding Assets](#),” on page 69.
 - d. Navigate to the desired asset and click its name.
Content Server displays the asset’s “Inspect” form.

4. Create the translation asset and set its target language. In the **Translations** field, click **Translate** next to the desired target language.



Note

A multilingual set can contain only one translation per locale. If a translation of the asset already exists in a given locale, the **Translate** function is replaced by a **Delete** (trash can) icon.

Content Server copies the asset, sets the locale of the copy according to your choice from [step 4](#), and displays the copy in a “New” asset form. The form is pre-filled with the content from the source asset.

5. Translate the asset. In the “New” form, do the following:
 - a. Enter a name for the translation asset.

Tip

It is a good idea to name the new asset in a way that indicates it is 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 (W semicolon (;), colon (:), and question mark (?).
 - The name can contain spaces (except for names of flex attributes), but cannot start with a space.
- b. Replace the content in each field with an appropriate translation.
 - If a field has a red asterisk preceding its name, it is a required field, which means you cannot leave it blank. If any of the fields are unfamiliar to you, consult your design team or administrator.
 - You may see one or more fields that allow you to visually select an image asset to be associated with the translation asset you are creating. In such cases, you will see a **Choose Visually** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more information on Image Picker, see “[Working with the Image Picker](#),” on page 100.
 - You may see one or more fields that allow you to visually select a date (such as a post date, release date, and so on) in addition to the standard text box. In such cases, you will see a **Date Picker** (little calendar) icon next to the field.

Clicking the icon invokes the Date Picker attribute editor; for more information on Date Picker, see [“Working with the Date Picker,” on page 102](#).

6. When you are finished, click **Save**.

Content Server displays the translation asset you created in the “Inspect” form.

7. (Optional) If you want to see how the asset would look if it were published, you can preview it. To preview an asset, click **Preview** in the action bar at the top of the form. A new browser window opens and displays the asset in its rendered form. For more information, see [“Previewing Assets” on page 83](#).

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

- a. In the asset’s “Inspect” form, scroll to the “Related Items” area and examine the assets associated with the translation you created.

When you create a translation of an asset, Content Server automatically associates the associated assets of the source asset 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 instead. 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 3, on page 104](#) for information on how Content Server handles asset relationships with respect to multilingual assets.

- b. (Optional) If in [step a](#) you determined that one or more assets associated with the translation asset have to be translated, repeat [steps 3–6](#) (and, optionally, [steps 7–8](#)) of this procedure for each associated asset requiring translation, then follow the steps in [“Associating Assets,” on page 123](#) to associate the translated versions with the translation asset. (If an associated asset has its own set of associated assets, repeat [step 8](#) for each asset related to the associated asset.)
9. (Optional) If you want to create additional translations of the source asset, repeat [steps 3–8](#) of this procedure.

Examining the Available Translations of an Asset

If you want to check if a translation of an asset exists in a specific language, examine the **Translations** field in the asset’s “Inspect” form. If the desired translation appears in the field, you can open the translation by clicking its name.

To check whether a specific translation of an asset exists

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose translations you want to examine and open its “Inspect” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section [“Finding Assets,” on page 69](#).

- d. Navigate to the desired asset and click its name.

Content Server displays the asset in the “Inspect” form.

4. Examine the **Translations** field to see whether the translation you are looking for exists.

This is an existing translation. Click its name to open it in the “Inspect” form.



A translation in this language does not yet exist in this set.

5. (Optional) Click the name of the translation to open it in the “Inspect” form.

Deleting a Translation of an Asset

You can delete a translation of an asset using the asset’s “Inspect” form.

To delete a translation of an asset

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose translation you want to delete and open its “Inspect” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section “[Finding Assets](#),” on page 69.
 - d. Scroll to the desired asset and click the asset’s hyperlinked name.
Content Server displays the asset’s “Inspect” form.
4. In the **Translations** field, click the **Delete** (trash can) icon next to the translation (language version) you want to delete.



Content Server displays a message asking you to confirm the deletion.

5. If you are sure you want to delete the translation asset, click **Delete This Item**. Otherwise, click **Cancel**.

Content Server displays a message confirming that the translation asset was deleted. The asset's status in the database is changed to "void." Standard searches will not retrieve assets that are marked as void.

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.

Note

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 205.

To change the master asset of a multilingual set

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the master asset of the multilingual set and open its "Inspect" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section "[Finding Assets](#)," on page 69.
 - d. Navigate to the desired asset and click its name.
Content Server displays the asset's "Inspect" form.
4. In the **Translations** field, click **Make Master** next to the translation you want to designate as the new master asset of the multilingual set.



Content Server refreshes the "Inspect" form showing the newly selected master asset in the **Translations** field.

Embedding Links Within Assets

When creating and updating assets, you may need to:

- **Embed a hyperlink to another asset from the current site.** For example, you may want to include a hyperlink to an article within the body text of another article. When site visitors access the content, they will be able to follow the link and access the related content.
- **Embed an external URL.** For example, if you are writing an article on stock trading, you may decide to include a hyperlink to a related website at the end of your article.
- **Include the contents of another asset from the current site.** For example, you may want to include a direct citation from an article in another article, without manually duplicating the content. This way, if the linked content changes, the content in which the link is embedded stays up to date. (Note that this method of linking may not be supported by some WYSIWYG editors.)

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 “Article” asset type that ships with the Burlington Financial sample site supports all three types of embedded links in its **Body** field. The following subsections describe how to use embedded links within the context of the Burlington Financial “Article” asset.

Embedding an Internal Link

An internal link is one that invokes another asset from the current asset within the same site.

Consult your administrator to find out which asset types on your system permit link embedding. Also, some assets may contain multiple fields that allow link embedding within their contents; in such cases, determine which field you would like to embed the link in before starting the procedure.

Before you can embed a link to an asset into another asset, you should place it in your Active List for easy retrieval during the linking process:

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**.
4. In the “Search” form, click the asset type of the asset you want to find.
5. Enter the desired search criteria (if any) and click **Search**.
6. In the search results list, navigate to the asset(s) you want to add to your Active List, and select the box next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)

Note

When selecting your assets, make sure they are previewable; that is, they have the appropriate templates associated to them.

7. When you have selected your assets, click **Add To My Active List**.

For more information on searching for assets and building your Active List, see the sections “[Finding Assets](#),” on page 69 and “[Saving Search Results](#),” on page 76.

To insert an internal link in a text field of an asset

1. Find the asset into which you want to embed an internal link and open its “Edit” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
 - d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

You can also embed an internal link in a new asset when populating its “New” form.
2. In the tree, click the “Active List” tab and select the asset that you want to link to. By definition, the selected asset must be previewable; that is, it must have an associated template.
3. In the desired field (**Body** field in this example), select the text that you want to be hyperlinked. Alternatively, you can type new text anywhere in the field and select it.
4. Click the **Add Link** button to the right of the field.

The “Add Embedded Link” pop-up window appears:

5. In the pop-up window, do the following:
 - a. (Optional) In the “Select Template” drop-down list, select the template that will render the linked asset. The linked asset’s default template is preselected.
 - b. (Optional) In the **Link Text** field, edit the text you chose in the contents of the field to be hyperlinked.
 - c. Click **Save Changes** to save the embedded link.

The pop-up window closes, and the link appears in coded format in the field:

Body:

```

Retailers, in an effort to stave off <A
HREF="_CSEMBEDTYPE_internal&_PAGENAME_=Burlingt
onFinancial%2FArticle%
2FFull&_cid=1036248768064&_c=Article"
contentEditable=false>dire forecasts</A>, are
slashing their prices to lure people to the
cash registers.
  
```

Add Link
Include

The information between the <A and tags denotes the link as internal and identifies the following for the system: the linked asset, the template to use, and the hyperlinked text.

Note

You can edit the link text only. Do not edit any other part of the string unless you are an experienced programmer or designer.

If the field you are embedding the link into is using a WYSIWYG-enabled, the link code does not appear; instead, the hyperlinked text appears underlined and in blue.

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

If you cancel instead, the link is removed from the contents of the field.

7. Preview the asset to view and test the embedded link. The content should appear with a hyperlink to the asset that you embedded. Clicking the link displays the asset in the selected template.

Embedding an External Link

An external link is one that invokes a URL to a page on an external web site. You can insert an external link only if a “Link” asset pointing to the external URL exists in the current site.

Consult your administrator to find out which asset types on your system permit link embedding. Also, some assets may contain multiple fields that allow link embedding within their contents; in such cases, determine which field you would like to embed the link in before starting the procedure.

Note

Before trying to embed an external link, contact your administrator to determine if you have the permissions to create or edit “Link” assets.

Before you can embed an external link into an asset, you should place the corresponding “Link” asset in your Active List for easy retrieval during the linking process.

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**.
4. In the “Search” form, click **Find Link**.
5. Enter the desired search criteria (if any) and click **Search**.
6. In the search results list, navigate to the asset you want to add to your Active List, select the box next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)
7. When you have selected your asset, click **Add To My Active List**.

For more information on searching for assets and building your Active List, see the sections “[Finding Assets](#),” on page 69 and “[Saving Search Results](#),” on page 76.

If you want to link to an external page for which a “Link” asset does not yet exist in your CS site, you can create the “Link” asset and store the appropriate URL in it:

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **New**.

Content Server displays a list of assets you can create.

4. Click **New Link**.

Content Server displays the “New Link” asset form:

Link:

Cancel Save

*Name:

Description:

Subtype:

Keywords:

HREF:

☐ Select to validate this link on Save

Cancel Save

5. In the “New Link” asset form, populate the appropriate fields. If you want Content Server to validate the URL you entered in the **HREF** field, select the **Select to validate this link on Save** box.
6. Click **Save**. Content Server displays the “Link” asset’s “Inspect” form. If you chose to have Content Server validate the URL you entered in the form, Content Server also displays a message indicating the result of the validation.
7. In the action bar of the “Inspect” form, click **Add to My Active List** to add the “Link” asset you just created to your Active List. You will select this “Link” asset from your Active List when embedding a link to the desired external page into your asset, as described in the next procedure.

To insert an external link in a text field of an asset

1. Find the asset into which you want to embed an external link and open its “Edit” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
 - d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

You can also embed an external link in a new asset when populating its “New” form.
2. In the tree, click the “Active List” tab and select the “Link” asset you want to embed.
3. In the desired field (**Body** field in this example), select the text that you want to be hyperlinked. Alternatively, you can type new text anywhere in the field and select it.

4. Click the **Add Link** button to the right of the field. The following pop-up window appears:



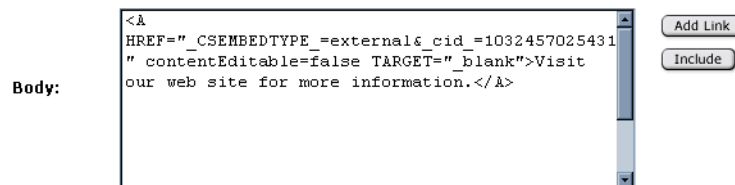
The dialog box is titled "Add Embedded Link". It contains the following fields:

- Name:** FatWire
- Type:** Link
- HREF:** http://www.fatwire.com
- To:**
 - Name:** 100-A637-2001Mar9
 - Type:** Article
 - Field:** Body
- Link Text:** A text area containing "Visit our web site for more information."
- Link anchor:** An empty text field.

At the bottom are two buttons: "Cancel" (with a red X icon) and "Save & Close" (with a floppy disk icon).

5. (Optional) Edit the text to be hyperlinked.
6. Click **Save Changes**.

The pop-up window closes, and the link appears in coded format in the desired field as follows:



The code editor shows the following HTML code in the "Body" field:

```
<A
HREF="_CSEMBEDTYPE_external&_cid=1032457025431"
contentEditable=false TARGET="_blank">Visit
our web site for more information.</A>
```

To the right of the code editor are two buttons: "Add Link" and "Include".

The information between the <A and tags denotes the link as external, and identifies the following for the system: the asset containing the URL and the hyperlinked text.

Note

You can edit the link text only. Do not edit any other part of the string unless you are an experienced programmer or designer.

If the field you are embedding the link into is WYSIWYG-enabled, the link code does not appear; instead, the hyperlinked text appears underlined and in blue.

7. Click **Save Changes** to save the asset.
If you cancel instead, the link is removed from the contents of the field.
8. Preview the asset to view and test the embedded link. The content should appear with a hyperlink to the URL you embedded. Clicking the link opens the linked web page in a separate browser window. If you remove `TARGET="_blank"` from the embedded string, the web site opens in the current browser window.

Embedding the Contents of an Asset

You can embed the contents of another asset (from the current site) into an asset of your choice. That asset content is displayed by a particular template, typically a pagelet.

Consult your administrator to find out which asset types on your system permit content embedding. Also, some assets may contain multiple fields that allow link embedding within their contents; in such cases, determine which field you would like to embed the link in before starting the procedure.

Note

You cannot embed the contents of an asset into a field that is set to use a WYSIWYG editor as its attribute editor.

Before you can embed the contents of an asset into another asset, you should add the source asset(s) to your Active List for easy retrieval during the embedding process.

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Search**.
4. In the "Search" form, click the asset type of the asset(s) you want to find.
5. Enter the desired search criteria (if any) and click **Search**.
6. In the search results list, navigate to the asset(s) you want to add to your Active List and select the check box(es) next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)

Note

When selecting your assets, make sure they are previewable; that is, they have the appropriate templates associated with them.

7. When you have selected your assets, click **Add To My Active List**.

For more information on searching for assets and building your Active List, see the sections "[Finding Assets](#)," on page 69 and "[Saving Search Results](#)," on page 76.

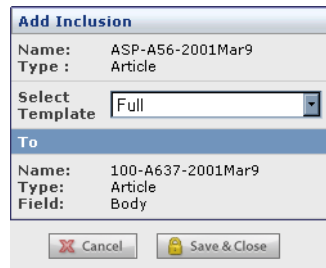
To embed another asset's contents in the text field of an asset

1. Find the asset into which you want to embed the contents of another asset, and open its "Edit" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
 - d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

You can also embed the contents of an asset in a new asset when populating the new asset's "New" form.

2. In the tree, click the "Active List" tab and select the asset whose contents you want to embed.

3. In the desired field (**Body** field in this example), at the point where you want to insert the asset contents, type some text and select it. Anything will do; what you type and select is replaced by the contents.
4. Click the **Include** button to the right of the field. The following pop-up window appears:



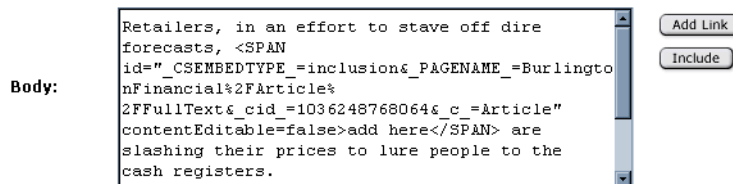
The 'Add Inclusion' dialog box contains the following information:

Name:	ASP-A56-2001Mar9
Type :	Article
Select Template	Full
To	
Name:	100-A637-2001Mar9
Type:	Article
Field:	Body

At the bottom are 'Cancel' and 'Save & Close' buttons.

5. (Optional) In the “Select Template” drop-down list, select the template that will display the asset contents. The selected asset’s default template is preselected.
6. Click **Save Changes**.

The pop-up window closes, and the link appears in coded format in the field as follows:



The 'Body' field contains the following HTML code:

```

Retailers, in an effort to stave off dire
forecasts, <SPAN
id="_CSEMBEDTYPE_inclusion&_PAGE_NAME_=Burlington
Financial%2FArticle%
2FFullText&_cid_=1036248768064&_c_=Article"
contentEditable=false>add here</SPAN> are
slashing their prices to lure people to the
cash registers.
  
```

To the right of the text area are 'Add Link' and 'Include' buttons.

The information between the <SPAN and tags denotes the link as an inclusion and identifies the following for the system: the included asset, the template to use, and the hyperlinked text.

Note

You can edit the link text only. Do not edit any other part of the string unless you are an experienced programmer or designer.

7. Click **Save Changes** to save the asset.
If you cancel instead, the embedded asset content is removed from the contents of the field.
8. Preview the asset to view and test the embedded link. The content should appear with the included asset at the point of insertion, replacing the dummy text you entered as link text. The included asset contents should be displayed in the selected template.

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 **Share Assets** function 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 has a workflow assigned to it, 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

1. If Content Server’s interface is not open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to share:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to share.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

4. In the search results list, navigate to the asset you want to share and click its **Inspect** icon. Content Server displays the asset’s “Inspect” form.
5. In the action bar, select **Share asset type** from the drop-down list.
6. In the “Share” form, select the names of the sites to which you want to share the asset.
7. Click **Save Changes**.

Content Server refreshes the asset’s “Inspect” form, with a confirmation message at the top listing the sites from which the asset is accessible.

Working with Grouped Assets

When working with assets, you might want to organize them in groups and place them in specific order. If you are a marketer and Engage is installed on your system, you might also want to create lists of assets related to other assets in some way based on context, or lists of asset that change based on some variable, such as the current date, or time of day. You might also want to deliver different groups of assets depending on the demographic data of your visitors. In such cases, you would use “Collection” and “Recommendation” assets.

Working with Collections

Suppose you want to choose, rank in order, and deliver sets of content that your visitors will most likely want to see when viewing your site. For example, you might want to place five top political news stories, organized in the order of importance, on the home page of your site every morning. In a case like this, you can build your “Top Five” list of articles using a “Collection” asset.

A “Collection” asset stores a list of basic assets of a single asset type, organized in a specific order. The assets you can include in a collection come from the results returned by one or more queries. You choose the assets you want to include in the collection by ranking them in the order of your choice in the list of query results. This ranked, ordered list of assets is the collection.

Typically, site designers or administrators create “Collection” assets and assign the appropriate queries and templates to them. Your job is to choose the most suitable content to be included in the collection.

Keep in mind is that once you build your collection, other users with the appropriate permissions can access the “Collection” assets you worked with and change your asset rankings within them.

Note

“Collection” assets can store lists of basic assets only. For flex assets, functionality similar to that of “Collection” assets (and much more) is provided by “Recommendation” assets (described later in this section).

Building a Collection

A “Collection” asset must already exist in the site you are working with in order for you to be able to build the desired collection. Your site designer or administrator is usually the person responsible for creating new “Collection” assets and editing existing ones.

To build a collection

1. If Content Server’s interface is not open, log in.
2. If prompted, select the site you want to work with.
3. Find the collection you want to build:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click **Find Collection**.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

4. In the list of search results, scroll to the desired “Collection” asset and click its **Inspect** icon.
5. In the action bar, select **Build** from the drop-down list. (You can also click the **Build** hyperlink in the lower right corner.)

Content Server runs the query (or queries) in the collection and displays the results in two or more lists of assets.

Build Collection:Analyst Home Stories

Current Articles

Rank	Remove	Name	Description
<input type="text" value="1"/>	<input type="checkbox"/>	Aetna-A446-2001Mar9	Aetna Reports Second Quarter 2000 Earnings
<input type="text" value="2"/>	<input type="checkbox"/>	Metlife-A698-2001Mar9	Metlife Q2 Earnings Climb 18%, Led by Retail Products
<input type="text" value="3"/>	<input type="checkbox"/>	Wal-Mart-A706-2001Mar9	Wal-Mart Reports Record Sales And Income for the Second Quarter

Query 1: My Active List Articles

Rank	Name	Locale	Headline	Modified
<input type="text"/>	100-A637-2001Mar9		100 Blank Passports Still Missing in D.C.	Mar 18, 2001
<input type="text"/>	Analysis-A67-2001Mar9		Analysis: Hillary Lacks Political Luck	Mar 18, 2001
<input type="text"/>	American-A506-2001Mar9		American Express,Ventro to Build B-to-B Marketplace	Mar 18, 2001
<input type="text"/>	Analysts-A322-2001Mar9		Analysts See Strong Q3 Earnings Despite Recent Warnings	Mar 18, 2001

Query 2: Main Stocks Query

Rank	Name	Locale	Headline	Modified
<input type="text"/>	Mutual fund fee		Try to Avoid 21d-2 Fees	Jun 20, 2001
<input type="text"/>	Japan-A41-2001Mar9		Japan Stocks Review: Climbs 2.4%; Tops 16,000 on Nasdaq Rise	Mar 18, 2001
<input type="text"/>	US-A96-2001Mar9		US Equities Middy: Nasdaq Falls 1%; Djia Inches Higher	Mar 13, 2001
<input type="text"/>	Hong-A43-2001Mar9		Hong Kong Stocks Review: China Tech Shares Keep Index in the Black	Mar 13, 2001
<input type="text"/>	Singapore-A42-2001Mar9		Singapore Stocks Review: Close 1.1% Higher, Tracking U.S. Trend	Mar 13, 2001

Query 3: Companies Query

Rank	Name	Locale	Headline	Modified
<input type="text"/>	Broadcom-A652-2001Mar9		Broadcom Buys Silicon Spice	Mar 27, 2001
<input type="text"/>	Fry-A448-2001Mar9		Fry's Launches Web Site to Sell DSL Service	Mar 27, 2001
<input type="text"/>	Heartland-A167-2001Mar9		Heartland to Buy Metal Products Firm Mascotech for \$2 Billion	Mar 9, 2001
<input type="text"/>	EU-A165-2001Mar9		EU Commission Approves Sale of Deutsche Telekom's CATV Network	Mar 9, 2001
<input type="text"/>	Bakbone-A164-2001Mar9		Bakbone's Netvault Makes North American Debut	Mar 9, 2001

6. Rank the assets by entering the appropriate number (up to three digits) in the **Rank** field. If you want to remove an asset that is already included in the top list, select the **Remove** option next to its **Rank** field. Deleting an asset's rank number from the query list will not remove it from the collection.

Note

When you rank the assets in your collection, do so in an order that is appropriate to the template element that renders the page. For example, if your collection contains 50 assets, but the template that renders it is coded to display only five, only the first five highest-ranked assets in the collection will be displayed on the page. Consult your site developers if you are unsure about the properties of the templates you are using.

7. Click *Save Changes*.

Content Server builds the collection and displays it in the “Inspect” form.

Working with Recommendations

“Recommendation” assets (provided Engage is installed on your CS system) allow you to personalize product placements and promotional offerings that are displayed for each site visitor. Recommendations determine which assets (products, for example) should be featured or “recommended” on a page, based on available information about your site visitors (such as age, or last viewed product).

You can personalize the content your visitors view in the following ways:

- **Create Static List recommendations.** These are lists of assets that are displayed according to demographic criteria such as age or income, as well as other information in the site visitor’s profile. For example, you can create a list of top dance clubs and show it only to visitors who specify their age range to be between 18 and 24. (This specific age range for which a list of clubs would be displayed is called a segment.) For visitors whose age falls outside this range, you can display another static list recommendation, for example, a list of top beach resorts.
- **Create Related Items recommendations.** Related Items recommendations allow you to link to each other assets that bear some sort of relation to one another. This way, whenever a visitor views an asset that is linked to another asset via a Related Items recommendation, he/she will also see the related asset. You can thus create a “path” or a “link trail” for your visitors to follow by consecutively linking assets to one another using a Related Items recommendation.

The goal is to persuade your visitors to view additional content related to the content they are viewing at a given moment by showing them a teaser for the related content alongside the main content. Related Items recommendations are thus excellent for business tactics such as up-selling or cross-selling merchandise.

For example, you can link to one another a number of movies that share a common theme or genre, such as the Godfather trilogy. You link part I of the trilogy to part II, and part II to part III using a Related Items recommendation. This way, when a visitor looks at part I of the trilogy, Content Server will also show part II. When the visitor then looks at part II, Content Server will also show part III. Additionally, you could link parts II and III to part I so your visitors know they should watch part I first when they view part II or III.

- **Create Dynamic List recommendations.** Unlike Static List and Related Items recommendations, the functionality of Dynamic List recommendations is defined by customized code written by your developers. Because of that, Dynamic List recommendations are the most flexible out of the three types of “Recommendation”

assets in terms of fulfilling specific business needs. For example, your developers can code a Dynamic List recommendation to behave like a Related Items recommendation, but instead of requiring the related assets be linked manually, the recommendation can track the movies a visitor has bought in the past and recommend movies that most closely match his or her past purchases in terms of theme or genre. In such case, you would simply assign the recommendation to the assets you want to be included in the recommendation.

In the end, the choice regarding the type of recommendations used depends largely on how you or your site designers want your site to behave.

Note

If Engage is not installed on your CS system, only Static List recommendations (without segment support) are available.

To learn how to create “Recommendation” assets, see [“Creating Recommendation Assets,” on page 249](#).

Working with Asset Associations

Suppose you want to publish an article that refers to a number of supporting images and source documents. In such case, you can associate them with your article so you can publish them together as a set. By associating your “Article” asset with its supporting “ImageFile” and “Document” assets, you designate your “Article” asset as the “parent” for its associated assets, which then become its “children.”

Named Associations

A named association is a definition for an explicit relationship set up by your administrator between two selected asset types. Named associations are represented as fields in the **Related** area of the parent asset’s “New” and “Edit” asset forms; the name of each field is the name of each association defined for that asset type.

For example, the “Article” asset type included in the Burlington Financial sample site contains a predefined association with “ImageFile” assets — when you select an “ImageFile” asset in the **Main Image** field of the “Article” asset, the selected “ImageFile” asset becomes a child of the “Article” asset (its parent). This does not, however, prevent that “ImageFile” asset from becoming a child of other assets. For example, a portion of a sample “Article” asset’s “Edit” form showing the fields for associated assets appears as follows:

Associated ImageFile:

Teaser Image

Edit GameWorldThumbnail Add Selected Items

Main Image

Edit GameWorldFullSize Add Selected Items

The administrator can limit the scope of a named association to a specific subtype of a particular asset type. In the Burlington Financial sample site for example, you can limit the association between “ImageFile” and “Article” assets to only the Standard (and not the Columnist) subtype of the “Article” asset type. In such cases, the **Related** area in the

asset's "Edit" form will show only the named associations applicable to the asset type and subtype chosen in the association. Because an asset subtype can be specific to a particular CS site, this mechanism can be used to make asset associations site-specific as well.

Note

Remember that merely associating assets with other assets does not ensure that they will appear on the actual page. The template elements for your assets must be coded to recognize and format the related or associated assets or they will not be displayed on your delivery site.

Unnamed Associations

In certain situations, an asset can be associated with another asset without involving a named association. For example, when an "Article" asset is assigned to a "Page" asset, the "Article" asset becomes a child of the "Page" asset (which automatically becomes its parent), even though no explicit association definition is involved. In such cases, the association made between the assets is implicit, or unnamed.

Unnamed associations are therefore a way of establishing parent-child relationships between assets for the sole purpose of creating a dependency between them. Unlike named associations, unnamed associations are not limited to linking exactly two assets of two specific asset types; an asset can have as many child assets of as many types linked to it via unnamed associations as necessary.

Note

By default, the only asset type in Content Server capable of unnamed associations is the "Page" asset type. The assets associated with a "Page" asset through unnamed associations appear as a list in the "Page" asset's "Inspect" and "Edit" asset forms. For other asset types, support for unnamed associations (as well as an appropriate user interface element used to select assets for unnamed associations) must be specifically coded by your site developers.

Associating Assets

To associate an asset with another asset

This procedure uses the Burlington Financial sample site as an example and therefore assumes that an association between the "Article" and "ImageFile" asset types has already been created.

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with (**Burlington Financial** in this example).
3. Find the desired child asset(s) and add it to your Active List:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, select the asset type of the desired child asset (**ImageFile** in this example).
 - c. Enter the desired search criteria (if any) and click **Search**.

- d. In the search results list, navigate to the desired child asset(s) and select the box next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)

- e. When you have selected your assets, click **Add To My Active List**.

For more information on searching for assets and building your Active List, see the sections “[Finding Assets](#),” on page 69 and “[Saving Search Results](#),” on page 76.

4. Do one of the following:

- If you want to create a new asset to associate the child asset(s) with, click **New** in the button bar and select the asset type of the desired parent asset (for example, **New Article**).

Note

If the administrator set the asset type of your parent asset to be automatically assigned to a workflow when a new asset of that type is created, the “Choose Assignees” screen appears. In this case, select the appropriate assignees and click **Set Assignees**. See [Chapter 5](#), “[Workflow](#)” for more information on workflow and setting assignees.

- If you want to associate the child asset(s) with an existing asset, find that asset and open its “Edit” form:

- 1) In the button bar, click **Search**.
- 2) In the “Search” form, click the asset type of the desired parent asset (**Article** in this example).
- 3) Enter the desired search criteria (if any) and click **Search**.
- 4) In the search results list, navigate to the desired asset and click its **Edit** icon.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

5. Once the parent asset’s “New” or “Edit” form loads, associate the child asset(s) with your parent asset by doing one of the following, depending on the type of associations supported by the parent asset:

If the parent asset supports named associations:

- a. Scroll to the **Related** area of the parent asset’s “New” form.
- b. In the tree, click the **Active List** tab.
- c. In the **Active List** tab, select the desired child asset.
- d. In the **Related** area of the parent asset’s “New” form, click **Add Selected Items** next to the appropriate related asset field (**Main Image** in this example), as shown below:

Associated ImageFile:

Teaser Image	
<input type="button" value="Edit"/>	<input type="text" value="GameWorldThumbnail"/> <input type="button" value="Add Selected Items"/> <input type="button" value="Trash"/>
Main Image	
<input type="button" value="Edit"/>	<input type="text" value="GameWorldFullSize"/> <input type="button" value="Add Selected Items"/> <input type="button" value="Trash"/>

Each named association available to your parent asset will be represented by a separate field with its own **Add Selected Items** button. If a related asset field already references a specific child asset, the current child asset will be replaced with the new child asset you selected in [step c](#).

- e. Repeat [steps c](#) and [d](#) to add more child assets, as necessary.

If the parent asset supports unnamed associations:

Note

This procedure uses the “Page” asset as an example. If your developers have coded unnamed association support into additional asset types, the interface element used to select assets for the unnamed associations might look different from the example below.

- a. Scroll to the **Contains** field of the asset form.
- b. In the tree, click the **Active List** tab.
- c. In the **Active List** tab, select the appropriate child asset.
- d. In the **Contains** area of the parent asset’s “New” form, click **Add Selected Items**, as shown below:

The child asset appears in the **Current Contents** list. If the list contains more than one asset, you can change the order in which the assets appear in the list by selecting the asset and clicking the up or down arrow button.

6. Make other changes on the form as necessary, then click **Save**.

Content Server displays the parent asset’s “Inspect” form showing the asset’s details.

Disassociating Assets

To disassociate an asset from another asset

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the desired parent asset and open its “Edit” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the desired parent asset.
 - c. Enter the desired search criteria (if any) and click **Search**.
 - d. In the search results list, navigate to the desired parent asset and click its **Edit** icon.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

4. Once the parent asset’s “Edit” form loads, disassociate the child asset(s) from your parent asset by doing one of the following, depending on the type of associations supported by the parent asset:

If the parent asset supports named associations:

- a. Scroll to the Related area of the parent asset’s “Edit” form.
- b. Click the **Delete** (trashcan) icon next to the appropriate related asset field. The name of the currently associated child asset is displayed in the field:



Each asset type that can be associated with your parent asset is represented by a separate field with its own **Delete** icon.

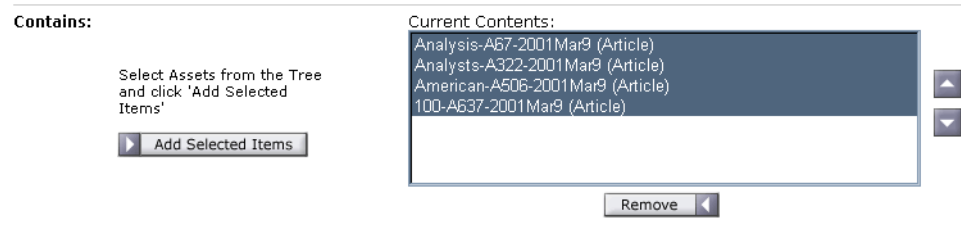
- c. Repeat [step b](#) to disassociate other child assets from the parent asset, as necessary.

If the parent asset supports unnamed associations:

Note

This procedure uses the “Page” asset as an example. If your developers have coded unnamed association support into additional asset types, the interface element used to select assets for the unnamed associations might look different from the examples below.

- a. Scroll to the **Contains** area of the parent asset’s edit form. The associated child assets appear in the **Current Contents** list:



- b. In the **Current Contents** list, select the child asset(s) you want to dissociate from the parent asset. You can select multiple assets by **Shift-clicking** them. You can also select a range of assets by **Ctrl-clicking** the first and last assets in the range.
 - c. Click **Remove**.
5. Click **Save**.

Content Server displays the parent asset’s “Inspect” form showing the asset’s details.

Working with “Page” Assets

As a content provider, you update or revise the content in your “Page” assets and then approve them for publishing. You complete the following tasks, as necessary, to get your “Page” assets ready for publishing approval:

- Edit the assets that are included in the page (for example, change a headline or an abstract).
- Examine the collections included in the “Page” assets, and then rank and organize the assets in them (that is, you build the collections).
- Remove outdated assets and select updated ones to replace them.
- Preview the “Page” assets to be sure they display correctly.

When editing a “Page” asset, you use the same procedure you use for editing any other asset. You select assets you want to include from the tree, or if the tree is toggled off, from the Candidates list populated by the contents of the **Active List** and **History** tabs.

- For information about editing assets, see [“Editing Assets,” on page 79](#).
- For information about collections, see [“Working with Collections,” on page 119](#).
- For information about previewing assets, see [“Previewing Assets,” on page 83](#).
- For information about publishing approval, see [Chapter 4, “Publishing.”](#)

Deleting Assets

When you use the **Delete** function, the asset is not immediately removed from the database. Instead, its status is changed to void. The asset is removed from the database the next time the administrator performs a database purge.

When a previously published asset is marked for deletion on the content management system, it is automatically approved for publishing to any destination it had ever been published to, placed in the publish queue, and published as “deleted” during the next publishing session. Publishing the asset as deleted serves as a way to synchronize assets between the content management and delivery systems; assets deleted on the content management system are removed from the delivery site when the publishing session runs.

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 must unplace a placed “Page” asset before you can delete it.
- You cannot delete an asset if it is associated with another asset. (For example, an “ImageFile” asset referenced by an “Article” asset cannot be deleted without removing the reference first.) If you attempt to do so, Content Server displays a list of the offending associations. You can then edit the parent assets to disassociate the child asset you want to delete.

Deleting an Asset

To delete an asset

1. If Content Server's interface is not already open, log in.
2. Find the asset you want to delete:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to delete.
 - c. Enter the desired search criteria (if any) and click **Search**.For more information on searching, see the section "[Finding Assets](#)," on page 69.
3. In the search results list, navigate to the asset you want to delete and click its **Delete** icon.

You can also delete an asset from its "Inspect" form by clicking **Delete** in the action bar.

Note

If the asset you are trying to delete is associated with other assets, (for example, an "Article" asset belonging to a collection), Content Server displays an error message and a list with links to the associated assets. In such cases, you must unlink all associated assets from the asset you want to delete before you are allowed to delete it.

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

4. If you are sure you want to delete the asset, click **Delete This Item**. Otherwise, click **Cancel**.

Content Server displays a message confirming that the asset was deleted.

The asset's status in the database is changed to "void." Standard searches will not retrieve assets that are marked as void.

Chapter 4

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. When you publish, you copy assets from your management system to your delivery system (the system that hosts the web site).

This chapter describes the publishing process and the procedures used to approve assets for publishing. It includes the following sections:

- [Publishing Methods](#)
- [Approval for Publishing](#)
- [Approval Tasks](#)
- [Setting an Export Starting Point](#)
- [Publishing Tasks](#)

Publishing Methods

Content Server lets you serve content from your delivery system to client browsers in several ways:

- Dynamically, by drawing requested content from the CS database, formatting, and delivering it at the time of the request (unless the content is already cached).
- Statically (in the form of HTML files) from a delivery system powered by Content Server.
- Statically (in the form of XML files) from a delivery system powered by an application other than Content Server.

To support both dynamic and static content, Content Server provides the corresponding publishing methods:

- **Mirror to Server (dynamic destination)** – this publishing method copies your assets from the CS management system database to the CS delivery system database. Your web server can then generate pages dynamically when visitors request them.
- **Export to Disk (static destination)** – this publishing method renders all of your assets into static HTML files according to the templates provided by the design team. Those files can then be uploaded to the web server of your delivery system.
- **Export Assets to XML (external destination)** – this publishing method converts your assets into individual XML files and stores them in a directory. These asset files can then be published to an external content delivery system designed to handle them.

When you approve assets for publishing, you choose one or more delivery types and/or publishing destinations. Delivery types and destinations are set up and managed by the administrator. Consult your administrator to find out where (which destinations) and how (using which delivery type) your content is published.

Approval for Publishing

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 “Page” asset has an association with a “Collection” asset. The “Collection” asset has an association with three “Article” assets. Two of these articles have associations with “ImageFile” assets. This tree hierarchy forms a set of parent/child dependencies among all these assets.

Before an asset can be published, it must be **approved** for publishing. Requiring approval is a safeguard against publishing an asset whose dependent assets (parents or children) are not ready to be published. This prevents broken links on the delivery system.

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.

Asset Version Dependencies

Content Server enforces version control between dependent assets by using one of the following approval dependency relationships:

- **Exists** – requires that an asset’s dependent assets merely exist on the target destination, regardless of version. For example, a parent and its child asset have been approved and published. The child asset is edited, but not approved. The parent is then edited. When the parent is approved, it can be published even though the child has been edited and not yet approved again, because the child asset already exists on the target destination. An appropriate analogy for an **exists** dependency is an article and a supporting image: if the image is edited (resized, for example), the article that uses it can still be published without reapproving the image.
- **Exact** – requires that parent and child assets have the same version stamp on the target destination. For example, a parent and its child asset have been approved and published. The child asset is edited, but not approved. The parent is then edited. When the parent is approved, it is **held** for publishing because the child has been edited but not yet approved. When the child asset is approved, the parent is ready to be published because the versions now match. An appropriate analogy for an **exact** dependency is the relationship between a set of instructions and a supporting diagram: if one changes, the other must change to ensure they match.

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 a case, the asset is then held from publishing until its dependents are approved. See “[Approval States](#),” on page 138 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.

Dependencies: Dynamic Publishing

When you approve an asset for publishing to a CS-powered delivery system using the Mirror to Server delivery type, Content Server determines the asset’s dependencies (as well as their nature), and checks the version stamps on the dependent assets. In order to be published, all of its dependents must either be approved (exact) or previously published (exists). If not, the asset is held, pending resolution, which typically involves approval of the dependent assets.

Approval dependencies are recorded at the time the asset is approved. If the asset is subsequently changed, the asset is no longer considered to be approved, and it must be approved again before it can be published.

Dependencies: External Publishing

Assets approved for publishing as XML files using the Export to XML delivery type follow the same approval logic as those published using the Mirror to Server delivery type described earlier. Each asset’s dependents must either have been approved (exact) or previously published (exists); otherwise, the asset is held pending approval of its dependents. When the asset is approved and ready for publishing, it is written to an XML

file; approved dependent assets are also written to separate XML files. Dependent assets that were previously published are not written to XML files again, unless those assets have changed.

Dependencies: Static Publishing

For static publishing using the Export to Disk delivery type, Content Server uses the “Template” asset to determine asset dependencies. All the assets that are displayed by and linked to the rendering template are considered dependencies. If the assets displayed by the template have other assets linked to them, those linked assets are not, however, considered dependent. By default, the displayed assets have an **exact** dependency; the assets the displayed assets are linked to have an **exists** dependency.

Ultimately, the template designer determines the dependency type for the Export to Disk delivery type.

Default Approval Template

When publishing an asset, it is often desirable to use different templates, depending on the context. For example, you might want to place the same piece of content in the body of one page, but in a sidebar on another page. (Your administrator and/or design team will be able to provide information on which templates are available to you and when/how to use them.)

When you approve an asset, the template used to calculate dependencies should be the most inclusive; that is, the one that contains the most representative set of dependencies for all of the templates, even though it might not be the template that actually renders the asset on the delivery system. That is why there is the concept of a default approval template.

The administrator can configure a **default approval template** for each asset type for each publishing destination. An asset **subtype** can be used to further categorize an asset type. This way, the administrator can assign more than one default approval template for assets of a specific type, based on some other organizing construct. The list of subtypes (if any) that is available for a given asset type appears in a drop-down list in the asset’s “New” and “Edit” forms (basic assets only).

If no default template is configured, the **display template** selected in the asset’s “New” or “Edit” form is used to determine dependencies.

Export Starting Point

An export starting point must be defined for a static destination before approved assets can be published. If you try to publish without a starting point, you receive the following message after selecting a static destination:



A starting point says in effect, “publish this and everything associated with it”— that is, the asset designated as the starting point, and everything it links to, using the template

assigned. You can have one starting point or several starting points. Minimally, you would want each root node (top-level page) to be an export starting point, but you can also use it as a vehicle for exporting a subset of assets that you want to push to the delivery system. For more information, see the section “[Publishing Approved Assets](#),” on page 148.

Publishing Protection Mechanisms

The following is a list of ways in which the system attempts to ensure the integrity of content during the approval and publishing process:

- Approval and publishing tasks require the right permissions.
- All approval and publish activities are by destination.
- In Content Server’s interface, you approve assets either individually from their “Inspect” or “Status” forms, or in batches by selecting check boxes on a list of dependent assets. Assets can also be approved automatically through workflow.
Additionally, the administrator can bulk-approve all assets that belong to one or more asset types in a given site.
- An asset that is approved for a destination where publishing is in progress cannot be edited until the publishing session completes, unless the administrator has set up the system otherwise.
- An asset that is opened for editing after it has already been approved for a destination where publishing is in progress cannot be saved until the publishing session completes.
- Publishing is incremental; that is, only assets that are new or have been modified since the last publishing session for a given destination are published to that destination. The administrator can, however, force all approved assets to be published to a given destination even if identical assets already exist on that destination.
- All assets approved and ready for publication that were not previously published to a given destination, are published to that destination when a publishing session is initiated.

If you do not want an asset to be published during the next publishing session, remove it from the publishing queue for the destination. If the asset is a child of one or more assets approved for publishing to the same destination as the asset in question, the parent assets will be automatically removed from the destination’s publishing queue as well.

Approval Tasks

This section describes how to approve assets for publishing. The examples used are based on the Burlington Financial sample site.

This section describes the following tasks:

- [Approving an Asset for Publishing](#)
- [Checking an Asset's Approval Status](#)
- [Resolving Approval Conflicts](#)
- [Removing Assets from the Publishing Queue](#)

Approving an Asset for Publishing

Before you can publish an asset, it has to be approved for publishing. Asset approval can be either manual or automatic.

You can manually approve assets one at a time from the asset's "Status" 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 to the administrator.

Asset approval can also be automated. For example, the Normal Article Process workflow included with the Burlington Financial sample site has a final step that automatically approves assets in the workflow for publishing to the included Static and Dynamic target destinations. (For more information, see the section "[Sample Workflow](#)," on page 158.)

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

Note

You can also approve assets from the "Status" form; see the section "[Checking an Asset's Approval Status](#)," on page 136.

1. If Content Server's interface is not already open, log in.
2. Find the asset you want to approve for publishing and open its "Inspect" form:
 - **If the asset is currently assigned to you to work on:**
 - a) In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b) In the "My Assignments" list, navigate to the desired asset and click its name.
 - **If the asset is not currently assigned to you to work on:**
 - a) In the button bar, click **Search**.
 - b) In the "Search" form, click the asset type of the asset you want to find.
 - c) Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section “[Finding Assets](#),” on [page 69](#).

- d) Scroll to the desired asset and click the asset’s **Inspect** icon.

Content Server displays the asset’s “Inspect” form.

3. (Optional) To preview the asset before you approve it for publishing, click **Preview** in the action bar in the asset’s “Inspect” form.

Content Server opens a new browser window displaying the asset in its rendered form. 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** to save the asset.

If you are satisfied with the way the asset looks, close the preview window and continue to the next step.

4. In the asset’s “Inspect” form, select **Approve for Publish** from the drop-down list in the action bar.

Content Server displays the publishing approval form:

Article: GameMicroworldsArticle

Preview
 Inspect
 Edit
 Delete
 more...
 Item is in your Active List

Version 10
 Check Out
 Rollback
 Show Versions

Name: GameMicroworldsArticle
Description: Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Status: [Edited](#)
ID: 1168960674171
Modified: Jan 18, 2007 11:09:55 AM by fwadmin

Approve for Destination:
☒ Destination 1 (static) (using Export to Disk)
☐ Destination 2 (dynamic) (using Mirror to Server)

Cancel
 Approve

5. Select the destination for which you want to approve the asset.

“Destination 1 (static)” and “Destination 2 (dynamic)” are supplied generic target destinations for the Export to Disk and Mirror to Server publishing methods, respectively. Custom destinations configured for the current site are listed below the generic destinations. Note that you can approve an asset for only one destination at a time; repeat this procedure for each additional destination.

Note

Consult your administrator to find out where (which destinations) and how (using which delivery type) your content is published on your system.

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 for publishing to the selected destination.
 - If the asset has dependencies that are preventing publication, Content Server displays a list of the dependent assets:

Approve for publish to Destination 1 (static) of Article: GameMicroworldsArticle

Preview
 Inspect
 Edit
 Delete

 Item is in your Active List

Version 10

This asset cannot be published until dependent assets have been approved.

You must approve the following assets for destination Destination 1 (static) before GameMicroworldsArticle can be published:

Asset Type	Name	Description	Status	Modified	Approve
ImageFile	GameWorldFullSize		Edited	Jan 18, 2007	<input type="checkbox"/>
Template	AboutBlock	Template for formatting the About BF content	Edited	Nov 2, 2000	<input type="checkbox"/>
Template	TeaserSummary	Uses the Teaser Image in the article summary	Edited	Sep 18, 2000	<input type="checkbox"/>
Dimension	en_US	en_US	Created	Jan 18, 2007	<input type="checkbox"/>

In such case, scroll to the bottom of the list and click **Select All**; then click **Approve**. 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, scroll to the end of the list, click **Select All**, and then click **Approve**. 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. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose approval status you want to check and open its "Status" form:
 - **If the asset is currently assigned to you to work on:**
 - a) In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b) In the "My Assignments" list, navigate to the desired asset and click its workflow state, listed in the **Workflow State** column.

- **If the asset is not currently assigned to you to work on:**
 - a) In the button bar, click **Search**.
 - b) In the “Search” form, click the asset type of the asset you want to find.
 - c) Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section “[Finding Assets](#),” on [page 69](#).
 - d) Scroll to the desired asset and click the asset’s hyperlinked status name in the **Status** column of the search results list.

Content Server displays the asset’s “Status” form.

4. In the asset’s “Status” form, scroll down to the **Publishing Destination** section, which looks similar to the following:

Destination 1 (static) :	 Preview this for Destination 1 (static) Approval State: Approved. Approved and ready to publish to Destination 1 (static). Select a Template: AboutBlock File/Path: Specify Path/Filename, Start points Start points: BurlingtonFinancial%2FArticle%2FFull (BurlingtonFinancial%2FArticle%2FFull_1168960674171.html) Approve Dependents: 4 dependent assets
Destination 2 (dynamic) :	 Preview this for Destination 2 (dynamic) Approval State: Needs Approval. Not yet approved for publish to Destination 2 (dynamic).  Approve this asset.

The form displays the approval status of the asset for each destination that has been defined by the administrator for the current site. Depending on your configuration, you might not see all of the options described in this section. The available options are:

- The **Preview this for destination** link – when clicked, Content Server displays the asset in its rendered form the preview window.
- **Approval State** – describes the asset’s present approval state. A hyperlink is provided if some action is required; for example, **Approve this asset**. For more information, see “[Approval States](#),” on [page 138](#).
- **Template** – shows the rendering template currently assigned to the asset.
- The **Specify Path/Filename, Start Points** link – when clicked, Content Server displays the “Set Export Starting Point” form allowing you to set an export starting point when statically publishing an asset. For detailed instructions, see “[Setting an Export Starting Point](#),” on [page 145](#).
- **Start Points** – shows the export starting points currently set for this asset, if any.

- **Approve Dependents**, the **xx dependent assets** link – clicking this link displays all assets that are dependent on the current asset, regardless of their approval state:

Dependents of Article: GameMicroworldsArticle (for Destination 1 (static))

Preview Inspect Edit Delete Item is in your Active List

Version 10

4 dependent assets

Asset Type	Name	Description	Status	Approval Status	Dependency Type
ImageFile	GameWorldFullSize		Edited	Held.	Exact
Template	AboutBlock	Template for formatting the About BF content	Edited	Approved.	Exact
Template	TeaserSummary	Uses the Teaser Image in the article summary	Edited	Needs Approval.	Exact
Dimension	en_US	en_US	Created	Approved.	Exists

- If an asset's approval status is **Needs Approval**, you can click the **Needs Approval** link for that asset to approve the asset for publishing; when you do so, Content Server calculates that asset's dependencies and the asset's approval status changes to either **Approved** or **Held**.
- If an asset's approval status is **Held**, you can click the **Held** link for that asset to view a list of the asset's dependent assets that require publishing approval. To approve the dependent assets, scroll to the bottom of the list and click **Select All**; then click **Approve**. 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, scroll to the end of the list, click **Select All**, and then click **Approve**. Continue this process until all dependencies for all assets are approved.

These two events parallel the actions that you take in [step 6](#) of the procedure described in the section "[Approving an Asset for Publishing](#)," on page 134.

Approval States

The following table lists the approval states that can appear in the **Approval State** field in an asset's "Status" form for each publishing destination, what the states mean, and the action to take, as appropriate:

Table 4: Asset approval states

State	Meaning
Approved. Approved and ready to be published to <i>destination</i> .	(Informational) This asset will be published at the next publishing event to this destination, unless the asset, or one of its dependent assets (in Exact dependencies), is edited.
Approved and published. Asset version is the same as that on <i>destination</i> .	(Informational) An asset with an exact dependency has been published to this destination.

Table 4: Asset approval states (*continued*)

State	Meaning
Approved for inclusion as a link in pages exported to <i>destination</i> .	(Informational) This asset is approved for static publishing, if it is linked to from the page that is being exported.
Asset has been modified since approved for publish to <i>destination</i> .	(Action required) The asset must be reapproved. Click the Approve this asset link to initiate the approval process.
Approved, but approval for publish to <i>destination</i> was based on versions of the dependent assets that no longer exist.	(Action required) The asset must be reapproved so that its version matches that of its dependents. Click the Approve this asset link to initiate the approval process.
Held. This asset cannot be published until dependent assets have been approved.	(Action required) The asset will be held until the dependents are approved. Click the Show assets preventing this asset from being published link to view and approve the dependents.
Needs approval. Not yet approved for publish to <i>destination</i> .	(Action required) The asset must be approved. Click the Approve this asset link to initiate the approval process.
This asset cannot be published until assets referring to this asset have been approved.	(Action required) A referring asset has to be approved before this asset can be published. Related assets that are held are also listed and may require approval. Click the Show assets preventing this asset from being published link to view and approve referring and related assets.
Currently checked out. Will not be published to <i>destination</i> .	<p>(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:</p> <ul style="list-style-type: none"> • Checkin – the asset must be reapproved. • Undo Checkout – the asset remains approved and can be published. • Rollback – the asset must be reapproved.

Resolving Approval Conflicts

Approval conflicts arise when an asset is approved but is held from publishing because dependent or referring assets have not been approved.

To resolve an approval conflict for a single asset, follow the steps in “[Resolving an Asset’s Approval Conflicts](#),” on page 140

To resolve multiple approval conflicts globally for a specific destination, follow the steps in “[Resolving Approval Conflicts Globally for a Destination](#),” on page 142.

Resolving an Asset’s Approval Conflicts

To resolve an asset’s approval conflicts

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose approval conflicts you want to resolve and open its “Status” form:
 - **If the asset is currently assigned to you to work on:**
 - a) In the button bar, click **My Work**.
Content Server displays the “My Work” view, showing the “My Assignments” list.
 - b) In the “My Assignments” list, navigate to the desired asset and click its workflow state, listed in the **Workflow State** column.
 - **If the asset is not currently assigned to you to work on:**
 - a) In the button bar, click **Search**.
 - b) In the “Search” form, click the asset type of the asset you want to find.
 - c) Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section “[Finding Assets](#),” on page 69.
 - d) Scroll to the desired asset and click the asset’s hyperlinked status name in the **Status** column of the search results list.

Content Server displays the asset’s “Status” form.

4. In the asset’s “Status” form, scroll down to the **Publishing Destination** section, which looks similar to the following:

Destination 1 (static) :	<p> Preview this for Destination 1 (static)</p> <p>Approval State: Approved. Approved and ready to publish to Destination 1 (static).</p> <p>Select a Template: AboutBlock</p> <p>File/Path: Specify Path/Filename, Start points</p> <p>Start points: BurlingtonFinancial%2FArticle%2FFull (BurlingtonFinancial%2FArticle%2FFull_1168960674171.html)</p> <p>Approve Dependents: 4 dependent assets</p>
Destination 2 (dynamic) :	<p> Preview this for Destination 2 (dynamic)</p> <p>Approval State: Held. This asset cannot be published until dependent assets have been approved.  Show assets preventing this asset from being published.</p> <p>Approve Dependents: 3 dependent assets</p>

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

- Click the link, **Show assets preventing this asset from being published**, for the destination for which you want to resolve this asset's approval conflicts.

Content Server displays a list of the asset's dependencies requiring approval for the selected destination:

**Assets preventing GameMicroworldsArticle from being published to destination:
Destination 2 (dynamic)**

Preview
 Inspect
 Edit
 Delete

 Item is in your Active List

Version 11

This asset cannot be published until dependent assets have been approved.

You must approve the following assets for destination Destination 2 (dynamic) before GameMicroworldsArticle can be published:

Asset Type	Name	Description	Status	Modified	Approve
ImageFile	GameWorldFullSize		Edited	Jan 18, 2007	<input type="checkbox"/>
ImageFile	GameWorldThumbnail		Edited	Jan 18, 2007	<input type="checkbox"/>
Dimension	en_US	en_US	Created	Jan 18, 2007	<input type="checkbox"/>

- Scroll to the bottom of the list and click **Select All** to select all of the dependent assets in the list.
- Click **Approve**.

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; in such a case, scroll to the end of the list, click **Select All**, and then click **Approve**. Repeat 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:

Approved and ready to publish to Destination 1 (static).

Resolving Approval Conflicts Globally for a Destination

You can resolve approval conflicts for all assets that are held from publishing to a specific publishing destination.

To resolve approval conflicts globally for a destination

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Publishing**.

Content Server displays the Publish Console.

Note

If you do not see the **Publishing** button, stop here. You do not have the necessary permissions to access the Publish Console. Consult your administrator if you have questions about your permissions.

4. In the "Publish Destination" drop-down list, choose a destination and click **Select Destination**.

Content Server displays the status form for that destination:

Publish destination: Destination 2 (dynamic)

Destination: Destination 2 (dynamic) using Mirror to Server
Destination address: http://[targetserver]/cs/
Arguments: REMOTEUSER=[user]&REMOTEPASS=*****

[1 asset is held for publish.](#)

Could not find any assets which need to be published.


5. Click the link, **xx assets are being held for publish**.

Content Server displays a list of held assets for the selected destination:

Publish destination: Destination 2 (dynamic)

Destination: Destination 2 (dynamic) using Mirror to Server
Arguments: REMOTEUSER=[user]&REMOTEPASS=*****

1 asset is being held from publishing

Asset Type	Name	Description	Status	Modified	Approve
 Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	Edited	Jan 18, 2007	Held.

6. In the list, locate the asset whose dependency conflicts you want to resolve and click the asset's **Held** hyperlink.

Content Server displays a list of the asset's dependencies preventing the asset from being published:

Assets preventing GameMicroworldsArticle from being published to destination:
Destination 2 (dynamic)

Version 11 [Check Out](#) [Rollback](#) [Show Versions](#)

This asset cannot be published until dependent assets have been approved.

You must approve the following assets for destination Destination 2 (dynamic) before GameMicroworldsArticle can be published:

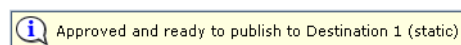
Asset Type	Name	Description	Status	Modified	Approve
ImageFile	GameWorldFullSize		Edited	Jan 18, 2007	<input type="checkbox"/>
ImageFile	GameWorldThumbnail		Edited	Jan 18, 2007	<input type="checkbox"/>
Dimension	en_US	en_US	Created	Jan 18, 2007	<input type="checkbox"/>

[Select All](#) [Cancel](#) [Approve](#)

7. Click **Select All** to select all check boxes next to the assets that need to be approved.
8. Click **Approve**.

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; in such a case, scroll to the end of the list, click **Select All**, and then click **Approve**. Repeat 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:



9. Repeat this procedure for each remaining held asset for the selected destination until you have resolved all approval conflicts. The batch of approved assets can then be published to that target destination.

Removing Assets from the Publishing Queue

If you decide that an asset that has already been approved for publishing (but not yet published) to a given destination should not be published to that destination, you can **unapprove** it. When you unapprove an asset, Content Server removes it from the publishing queue for the destination and changes its status to "Held."

If the asset is a child of one or more assets present in the publishing queue, Content Server removes the parent assets from the publishing queue for the destination and changes their approval states to "Held."

To remove an asset from the publishing queue

1. If Content Server's interface is not already open, log in.

2. If prompted, select the site you want to work with.
3. In the button bar, click **Publishing**.

Content Server displays the Publish Console.

Note

If you do not see the **Publishing** button, stop here. You do not have the necessary permissions to access the Publish Console. Consult your administrator if you have questions about your permissions.

4. In the “Publish Destination” drop-down list, choose a destination and click **Select Destination**.

Content Server displays the status form for that destination:

Publish destination: Destination 2 (dynamic)

Destination: Destination 2 (dynamic) using Mirror to Server
Destination address: http://[targetserver]/cs/
Arguments: REMOTEUSER=[user]&REMOTEPASS=*****

[4 assets are ready for publish.](#)














5. Click the link, **xx assets are ready for publish**.

Content Server displays a list of assets in the destination’s publishing queue.

Publish destination: Destination 2 (dynamic)

Destination: Destination 2 (dynamic) using Mirror to Server
Arguments: REMOTEUSER=[user]&REMOTEPASS=*****

4 Assets to be published:

	Type	Name	Description	Status	Modified
   	Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	Edited	Jan 18, 2007
	Dimension	en_US	en_US	Created	Jan 18, 2007
   	ImageFile	GameWorldThumbnail		Edited	Jan 18, 2007
   	ImageFile	GameWorldFullSize		Edited	Jan 18, 2007

6. Navigate to the asset you want to unapprove and click its **Unapprove** (minus sign) icon.

Content Server removes the asset from the publishing queue and changes its approval state to “Held.”

If the asset is a child of one or more assets present in the publishing queue, Content Server removes the parent assets from the queue and changes their approval states to “Held.”

Setting an Export Starting Point

When you publish content using the Export to Disk delivery type, you must define a starting point for the publishing process so the system knows where to start publishing from. You specify a top-level asset and the system publishes that asset and all the assets it links to.

When you set an asset as a starting point, you also have to specify the template to use for the asset. You can specify multiple templates for different publishing contexts. For example, you might want to place the same piece of content in the body of one page, but in a sidebar on another page. (Your administrator and/or design team will be able to provide information on which templates are available to you and when/how to use them.)

To set an asset as an export starting point

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to set as an export starting point and open its "Status" form:
 - **If the asset is currently assigned to you to work on:**
 - a) In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b) In the "My Assignments" list, navigate to the desired asset and click its workflow state, listed in the **Workflow State** column.
 - **If the asset is not currently assigned to you to work on:**
 - a) In the button bar, click **Search**.
 - b) In the "Search" form, click the asset type of the asset you want to find.
 - c) Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section "[Finding Assets](#)," on [page 69](#).
 - d) Scroll to the desired asset and click the asset's hyperlinked status name in the **Status** column of the search results list.
Content Server displays the asset's "Status" form.
4. In the **Publishing Destination** section of the asset's "Status" form, locate the desired static destination and click its **Specify Path/Filename, Start Points** link.

Content Server displays the export starting point form:

For Destination: Destination 1 (static)

Path:

Filename:

Is this asset an export starting point? ☒ Yes ☐ No

	Template	Force specified path	Force specified filename
Using templates:	<input type="checkbox"/> Compact	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Full	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> FullText	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> LeadColumnistSummary	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> LeadSummary	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> SidebarRow	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Summary	<input type="checkbox"/>	<input type="checkbox"/>

5. Complete the form as follows:

- a. **Path** (optional) If you want to override the path specified on the asset form (if any), enter it here.

The path is appended to the `<cs_install_dir>/export` directory.

For example, if you enter **PhilosophyArticles**, the path becomes:

`<cs_install_dir>/export/PhilosophyArticles`

- b. **Filename** (optional) If want to override the file name specified on the asset form (if any), enter it here.

By default, Content Server names the file as follows:

`site-assettype-template_assetid.html`

However, if you enter your own value in the **Filename** field, that value replaces the asset ID in the Content Server-default file name.

For example, if you enter **GameMicroworldsArticle**, the file name becomes:

`site-assettype-template_GameMicroworldsArticle.html`

Note that Content Server's default naming convention preserves file name uniqueness. If you override the default naming convention, you must manually ensure that the custom file name is unique.

Note

- The path and file name you specify in this form are specific to the selected destination. You can specify them independently of declaring the asset a starting point. Be sure to follow the naming conventions implemented by the administrator.
- If no values are entered and the asset itself has a path and file name specified, those values are used. Otherwise, Content Server uses its default naming convention to set the path and the file name.

Consult your administrator if you are unsure about the path and filename conventions in effect on your system.

- c. Select the checkbox(es) for the template(s) to use for the starting point. (Selecting a template automatically makes the asset an export starting point and selects the **Yes** radio button in the “Is this asset an export starting point?” field.) You can select multiple templates to define multiple starting points; for example, you might want a text-only starting point and a graphics-rich starting point, in which case, you might select the respective templates.

- d. Indicate whether to force the specified path.

Looking at the example, if you force the path, but not the file name, the path and file name become the following:

```
PhilosophyArticles/  
  site-assettype-template_GameMicroworldsArticle.html
```

- e. Indicate whether to force the specified file name. Forcing the file name drops the *site-assettype-template* portion, so that the name becomes simply the file name.

Looking at the example, the path and file name then become the following:

```
PhilosophyArticles/GameMicroworldsArticle.html
```

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

6. Click **Save.**

Content Server updates the asset’s “Status” form is with the specified information.

Publishing Tasks

This section describes the following tasks related to publishing previously approved assets:

- [Publishing Approved Assets](#)
- [Viewing Current Publishing Activity](#)
- [Viewing Scheduled Publishing Tasks](#)
- [Viewing Publishing History](#)

Note

The publishing tasks described in this section are executed from the Publish Console. Consult your administrator to find out if you have the appropriate permissions to access the Publish Console.

Publishing Approved Assets

As you approve assets, Content Server aggregates them by destination for publishing. When assets are published, they are either mirrored to the delivery server or exported to disk, depending on the publishing method configured by your administrator.

Publishing can be started immediately from the Publish Console, or can be scheduled by the administrator to start at a specific time. In both cases, publishing occurs as a background process, so you can continue to work in Content Server's interface. Who can publish is a matter of site policies and procedures.

To publish approved assets

Note

1. Before attempting to publish content, ensure that all approval conflicts for the destination you want to publish to are resolved. See [“Resolving Approval Conflicts,”](#) on page 140 for more information.
2. Consult your administrator to find out if you have the permissions to publish assets.

1. If Content Server's interface is not already open, log in.
2. Select the site you want to work with.
3. In the button bar, click **Publishing**.
Content Server displays the Publish Console.
4. In the Publish Console, choose a destination from the “Publish destination” drop-down list and click **Select Destination**.
Content Server displays the appropriate “Publish” form, according to the chosen delivery type:

For Export to Disk:**Publish destination: Destination 1 (static)****Destination:** Destination 1 (static) using Export to Disk**Arguments:** URLPREFIX=[urlprefix][2 assets are held for publish.](#)[1 reference with its associated references is ready for publish.](#)[References calculated using these starting points.](#)

Cancel

Publish

Keep the following in mind:

- The Export to Disk delivery type is reference-based; that is, the HTML files being published contain references to the approved assets.
- If there are no asset references ready to be published to the selected destination, the **Publish** button does not appear on the form.
- Remember that publishing to a static destination requires an export starting point (see “[Setting an Export Starting Point](#),” on page 145).
- If the form shows a link named **xx assets are held for publish**, there are assets with unresolved dependency conflicts that you must resolve before you can initiate publishing. See the section “[Resolving Approval Conflicts](#),” on page 140 for information on resolving dependency conflicts from the Publish Console.

For Mirror to Server:**Publish destination: Destination 2 (dynamic)****Destination:** Destination 2 (dynamic) using Mirror to Server**Destination address:** http://[targetserver]/cs/**Arguments:** REMOTEUSER=[user]&REMOTEPASS=*****[1 asset is held for publish.](#)

Could not find any assets which need to be published.

Cancel

Create Site On Target

Keep the following in mind:

- If there are no assets ready to be published to the selected destination, the **Publish** button does not appear on the form.
- If the form shows a link named **xx assets are held for publish**, there are assets with unresolved dependency conflicts that you must resolve before you can initiate publishing. See the section “[Resolving Approval Conflicts](#),” on page 140 for information on resolving dependency conflicts from the Publish Console.

- To view the list of approved assets, click the **xx assets are ready to publish** link:

Publish destination: Destination 2 (dynamic)

Destination: Destination 2 (dynamic) using Mirror to Server

Arguments: REMOTEUSER=[user]&REMOTEPASS=*****

4 Assets to be published:

	Type	Name	Description	Status	Modified
  	Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	Edited	Jan 18, 2007
  	Dimension	en_US	en_US	Created	Jan 18, 2007
  	ImageFile	GameWorldThumbnail		Edited	Jan 18, 2007
  	ImageFile	GameWorldFullSize		Edited	Jan 18, 2007

[Back](#)

[Publish](#)

Clicking **Back** returns you to the publishing status form for the selected destination.

- To publish the approved assets to the selected destination, click **Publish**.

Content Server displays a confirmation dialog box.

- Click **OK** to continue.

Content Server displays a message which either confirms that the publishing session started, or denotes that the session could not be started because publishing is in progress to the destination.

Note

You cannot selectively publish approved assets to a destination – you can only publish all approved assets at once or none at all.

Viewing Current Publishing Activity

You can use the Publish Console to monitor the status of the publishing sessions currently in progress. The information appears in the **Running Publish Sessions** section of the Publish Console.


To examine current publishing activity

- If Content Server's interface is not already open, log in.
- If prompted, select the site you want to work with.
- In the button bar, click **Publishing**.

Content Server displays the Publish Console.

- In the Publish Console, scroll down to the **Running Publish Sessions** section:

Running Publish Sessions

	Destination	Publish Begin Time	Status	Published by
	Destination 2 (dynamic)	Jan 18, 2007 1:20:25 PM	Running	fwadmin

Keep the following in mind:

- This list displays currently running publishing sessions (by destination) that were initiated either manually from the Publish Console or automatically as a scheduled event. The sessions are listed in the order they were initiated, with the most recent one first.
- Session status can be either **Running**, **Failed**, or **Error**; click the hyperlinked status description for an explanation of the problem and possible causes.
- Click the **Inspect** icon review the details for the selected publishing session.
- If a session's status is **Error**, a **Delete** (trash can) icon appears for that session. This icon allows you to delete the session after troubleshooting the cause of the error.

Note

The **Inspect** and **Delete** icons appear only for destinations that are configured for the current site. For other destinations, you can view whether a publishing session is in progress or in error, but you cannot inspect the session contents or delete a session that is in error.

Viewing Scheduled Publishing Tasks

If your administrator set up a publishing schedule, the status of the scheduled publishing sessions can be viewed in the **Scheduled Publishing Tasks** section of the Publish Console.

To view scheduled publishing activity

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Publishing**.
Content Server displays the Publish Console.
4. In the Publish Console, scroll down to **Scheduled Publish Tasks** section:

Scheduled Publish Tasks

Destination	Publish Time/Date	Scheduled By
Destination 1 (dynamic)	8,12,16:0:0 1,3,5/*/*	fwadmin
Destination 2 (static)	0:0:0 */*/*	fwadmin

Keep the following in mind:

- The administrator schedules publishing sessions by destination.
- Time format is hh:mm:ss W/DD/MM, where:
 - hh (hours)=0-23
 - mm (minutes)=0,15,30 or 45
 - ss (seconds)=0
 - W (days of the week)=0 (Sunday)-6 (Saturday)
 - DD (days of a month)=1-31
 - MM (months)=1-12

In the example shown, publishing is scheduled to **Destination 1 (static)** for every Monday, Wednesday, and Friday at 8:00PM, noon, and 4:00PM. For **Destination 2 (dynamic)**, publishing is scheduled for every day of the year at midnight.

- Schedule information is available for all destinations across all sites.



Viewing Publishing History

You can view the results of completed publishing sessions in the **Publish History** section of the Publish Console.

To view the publishing history

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Publishing**.
Content Server displays the Publish Console.
4. In the Publish Console, scroll down to **Publish History** section:

Publish History

Destination	Publish End Time	Status	Published by
  Destination 2 (dynamic)	Jan 18, 2007 3:17:24 PM	Done	fwadmin

Keep the following in mind:

- This list displays up to 20 completed publishing sessions. The most recent session appears first.
- Status can be either **Done** (success) or **Failed** (trapped as an error when the session was running).
- To review the results of a completed session, click the session's **Inspect** icon.
- To delete a session record, click its **Delete** (trash can) icon.

Note

The **Inspect** and **Delete** icons appear only for destinations that are configured for the current site. For other destinations, you can see whether the sessions have completed, but you cannot inspect the session results or delete the session record.

Chapter 5

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](#)
- [Sample Workflow](#)
- [Using Your Assignment List](#)
- [Viewing the Status of an Asset](#)
- [Using Workflow Functions](#)
- [Working with Workflow Groups](#)
- [Working with Workflow Reports](#)

Overview

The following sections describe basic workflow concepts and terminology.

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. Assets can also be grouped to flow through the same workflow in unison.

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 (or group) 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 for Review” 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 Burlington Financial sample site, “Send for Review” is a step originating from the “Workflow Initiated” state and resulting in the “Ready for Review” state. An asset can move from one state to another via more than one step. For example, an “Article” asset in the “Ready for Review” state can be rejected because of factual errors (via the “Reject for Error” step) or for stylistic problems (via the “Reject for Style” step).

Assets are assigned to users by role. As an asset progresses through the workflow, each step assigns it to users holding role(s) 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’s interface, you see all the assets that are assigned to you. When your work on the asset is complete, you use the **Finish My 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 "Article" 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 "Article" 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 see your assignments in the “My Work” view when you log in to Content Server's interface. When you are logged in, you can see an updated list of your assignments at any time by clicking the **My Work** button in the button bar.

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. The estimated time to completion is noted in the **Due** column of the assignment list.

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 My Assignment** function (available in the “Workflow commands” drop-down list in the asset's “Status” form). 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 My 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 My 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 My 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 My Assignment** function. When defining the workflow process, the administrator decides whether each step is **all-voting**, that is, 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.

Group Deadlocks

For workflow groups, the administrator can choose when to force assets to move together on a step-by-step basis, by flagging a workflow step as **group synchronized**. When a step is group synchronized, it causes all assets in the group to move to the next state in unison; that is, the assets in the group are held in the current workflow state until all assets have been voted on.

An individual asset can be deadlocked in a workflow group just as it can in normal workflow: different all-voting steps (especially if they are group synchronized) can lead to different states and a non-unanimous vote among the assignees can bring the workflow group to a halt. Just like single-asset deadlocks, group deadlocks cause additional work for all the participants involved, and should be avoided whenever possible.

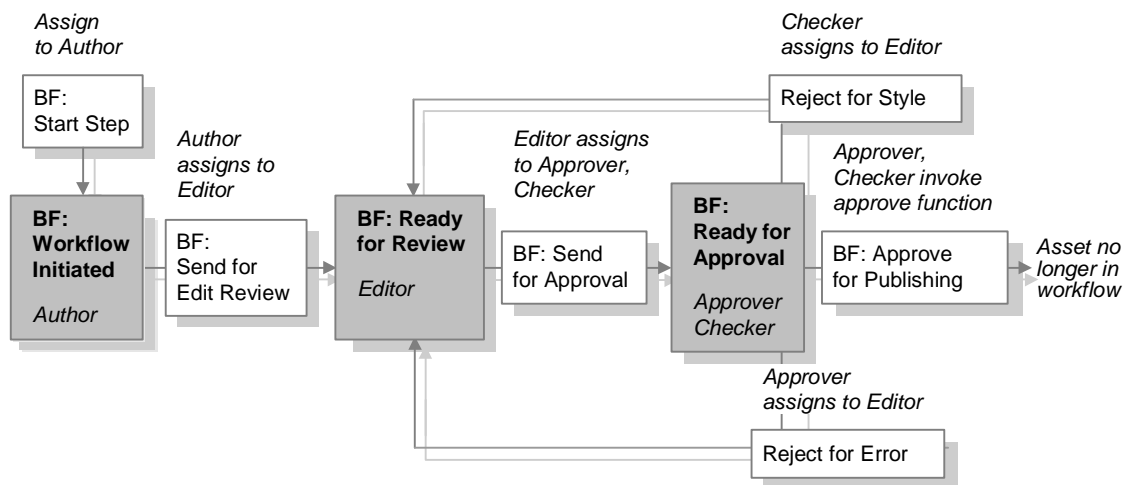
Sample Workflow

The Burlington Financial sample site includes a sample workflow process, **Normal Article Process**, which guides an “Article” asset from creation to approval for publishing. The sample workflow is simple, transitioning through three states via six possible steps, but it serves to illustrate how a workflow process works.

This sample workflow process has four roles participating: Author, Editor, Checker and Approver. Each role has only a single participant and the participant’s user name reflects their role; for example, user_author holds the author role. (Your organization will most likely have more complex processes, with several users participating in each role.) A participant from any of the four roles can create a new “Article” asset and assign it to the Normal Article Process workflow. By assigning the asset, workflow is initiated. The article then moves from author to editor to checker and approver. The checker and approver can either approve or reject the article. If either one rejects the article, it goes back to the editor. Both the checker and the approver must vote in agreement to approve the article for publishing. The next section describes a sample workflow process included in the Burlington Financial sample site.

Sample Workflow States and Steps

The flow of the Normal Article Process workflow is shown in the following diagram:



The steps and states from this workflow process are described in the following table:

Article in State...	Step	Description	Article Moves to State...
none	StartStep	A user with any of the four roles—author, editor, checker, or approver—assigns an “Article” asset to the Normal Article Process workflow.	Workflow Initiated
Workflow Initiated	Send for Review	A user with the author role receives e-mail notification of the assignment. The author writes and revises the article to complete the assignment.	Ready for Review
Ready for Review	Send for Approval	A user with the editor role receives an e-mail notification of the assignment. The editor makes some revisions to the article to complete the assignment.	Ready for Approval
Ready for Approval	Reject for Error	A user with the approver role receives an e-mail notification of the assignment. The approver completes the assignment by rejecting the article because of factual errors. The rejection triggers a notice to the editor, who must make some corrections and resubmit the article for approval.	Ready for Review
	Reject for Style	A user with the checker role receives an e-mail notification of the assignment. The checker completes the assignment by rejecting the article over stylistic objections. The rejection triggers a notice to the editor, who must make some corrections and resubmit the article for approval.	Ready for Review
	Approve for Publishing	Both the approver and the checker complete their respective assignments by approving the article. The “Article” asset is flagged in the CS database as “ready to publish” for selected destinations. It is then removed from workflow.	none

Sample Workflow Scenario

This section describes the typical flow of an “Article” asset through the Normal Article Process sample workflow.

1. A user creates the “Article” asset and assigns it to the workflow

The process starts when one of the eligible users creates the “Article” asset and assigns it to the workflow.

2. The author writes the article and sends it for review

Ada the author receives e-mail notification of the assignment. The “Article” asset is in the “Workflow Initiated” state (the first state in the workflow). Ada writes the article, saves the “Article” asset, and uses the **Finish My Assignment** function to send it on for review.

The workflow process changes the state of the article to “Ready for Review,” assigns it to Edie the editor, and sends Edie an e-mail notice about the new assignment.

3. The editor edits the article and sends it for approval

Edie the editor logs in, sees her assignment list, and opens the “Article” asset for editing. She reads the article and fixes some punctuation. When done, Edie saves her changes and uses the **Finish My Assignment** function to send it on for approval.

The workflow process changes the state of the article to “Ready for Approval,” assigns it to Alan the approver and to Charlie the checker, and sends them e-mail notices about their new assignment.

4. The checker and approver approve the article

- The approver approves the article

Alan the approver is already logged in, so when he receives his e-mail, he uses the **My Work** function to display his assignment list. Alan opens the newly assigned “Article” asset and examines it. It looks fine, so he uses the **Finish My Assignment** function. Because Alan can either approve or reject the article, the workflow process presents both options to him. However, since the approval step is all-voting, when Alan approves the “Article” asset, its state does not change until Charlie the checker also approves it.

- The checker approves the article

Charlie the checker examines and approves the article.

If either Charlie or Alan had rejected the article, it would have returned to Edie the editor. Because Charlie and Alan have approved it, the article is automatically approved for publishing and removed from workflow.

Note

In the Normal Article Process workflow, a rejection by either the approver or the checker cancels the assignment of the other person and returns the article to the editor. Your administrator might set up a workflow in which a disagreement like this causes a deadlock (see “[Deadlocks](#),” on page 157) that has to be resolved before the asset is returned to the previous state or moved to the next one.

Using Your Assignment List

When you first log in to a site, Content Server displays the “My Work” view in the workspace. Your assignments are listed in the “My Assignments” section of the “My Work” view.

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 become outdated. To update your list while you are currently logged in, click the **My Work** button on the button bar to display a refreshed “My Work” view that appeared when you first logged in. The “My Work” view shows the “My Assignments” list, for example:

My Assignments

Type	Name	Description	Workflow State	Due
Assets not in Workflow Group				
Article	India-A611-2001Mar9	India's Bpl Seeks \$Us300 Mln Loan from Japanese Bank	BF:Workflow Initiated	18h 59m
Article	Russian-A613-2001Mar9	Russian Npp Generate Over 76 Bln Kw/H Electricity in 2000.	BF:Workflow Initiated	+0h 33 min
Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	BF:Workflow Initiated	1d 23h 23m
Article	Matsushita-A507-2001Mar9	Matsushita System Transmits Health Data to Doctor Via Net	BF:Workflow Initiated	Due in 0h 40 min

» [Show my completed assignments still pending](#)

Notice that each assignment has a **Due** column. Each value in the **Due** column appears with color and symbols to indicate the status of the assignment:

Color/Symbol	Status of the Assignment
Black	Due within the time shown
Orange	Due in less than 24 hours
Bold Orange	Due in less than 1 hour
Bold Red with plus sign (+)	Overdue by the time shown

The due and past due events can trigger e-mail to the other participants in the workflow, if timed events are set accordingly for the workflow process. If there is no assignment deadline shown for the asset, it means that none was set.

Any assets that appear under **My Completed Assignments Still Pending** are assets that you voted on and that are now queued, waiting for all participants in the role to vote.

Viewing the Status of an Asset

Many of the procedures that appear in this section instruct you to view an asset's status, that is, to open the asset in the "Status" form. The "Status" form shows asset status information consisting of the asset's current workflow state, its assignees, and a history of assignments for the asset (showing the action taken for each assignment) in the current workflow. The "Status" form also shows whether the asset is approved for publishing and for which destinations. Most importantly, the "Status" form contains the "Workflow commands" drop-down list from which you invoke the workflow functions described in this section.

The "Status" form of an asset can be accessed in a number of ways:

- From the "My Assignments" list
- From the asset's "Inspect" form
- From the asset's "Edit" form
- From a list of search results
- From the tree

Viewing the Status of an Asset from the "My Assignments" List

To view the status of an asset from the "My Assignments" list

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Open the "My Work" view by clicking **My Work** in the button bar.
4. In the "My Assignments" section of the "My Work" view, navigate to the desired asset and click its workflow state (listed in the **Workflow State** column), as follows:

My Assignments

Type	Name	Description	Workflow State	Due
Assets not in Workflow Group				
Article	India-A611-2001Mar9	India's Bpl Seeks \$Us300 Mln Loan from Japanese Bank	BF:Workflow Initiated	18h 59m
Article	Russian-A613-2001Mar9	Russian Npp Generate Over 76 Bln Kw/H Electricity in 2000.	BF:Workflow Initiated	+0h 33 min
Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	BF:Workflow Initiated	1d 23h 23m
Article	Matsushita-A507-2001Mar9	Matsushita System Transmits Health Data to Doctor Via Net	BF:Workflow Initiated	Due in 0h 40 min





» [Show my completed assignments still pending](#)

Viewing the Status of an Asset from a List of Search Results

To view the status of an asset from a list of search results

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose status you want to view:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.
4. In the list of search results, navigate to the desired asset and click its status description (listed in the **Status** column), as follows:

Name	Locale	Headline	Status	Modified
   GameMicroworldsArticle	en_US	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	Edited	Jan 18, 2007 



Viewing the Status of an Asset from the "Inspect" Form

To view the status of an asset from the "Inspect" form

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose status you want to view and open its "Inspect" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.
- d. In the list of search results, navigate to the desired asset and click its **Inspect** icon.
4. Open the asset's "Status" form by doing one of the following:
 - In the asset's "Inspect" form, select **Status** from the drop-down list in the action bar.
 - In the **Status** field of the asset's "Inspect" form, click the hyperlinked status description, as follows:

Article: GameMicroworldsArticle

				more...	
Version 12   					
Name:	GameMicroworldsArticle				
Subtype:	Columnist				
Select a Template:	Full				
Status:	Edited				

Viewing the Status of an Asset from the “Edit” Form

To view the status of an asset from the “Edit” form

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose status you want to view and open its “Edit” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section “[Finding Assets](#),” on page 69.
 - d. In the list of search results, navigate to the desired asset and click its **Edit** icon.
4. In the **Status** field of the asset’s “Edit” form, click on the hyperlinked status description, as follows:

*Name:

Subtype:

Select a Template:

Status: Edited

Viewing the Status of an Asset from the Tree

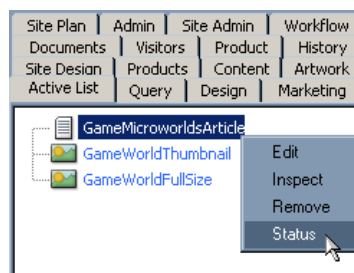
To view the status of an asset from the tree

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the tree, select the tab that contains the desired asset:
 - If the asset is in your Active List, select the **Active List** tab.
 - If you have recently worked with the asset, select the **History** tab.

Note

Since the tabs you see in the tree are set up by the administrator, consult your administrator to find out which tabs contain which assets.

4. Select the asset whose status you want to view.
5. Right-click the desired asset and select **Status** from the pop-up menu that appears:



Using Workflow Functions

The following subsections describe the workflow functions you use in Content Server's interface. These functions are available in the "Workflow commands" drop-down list in the asset's "Status" form (see ["Viewing the Status of an Asset," on page 162](#) to learn how to access this form). Depending on your function privileges and the way your site is configured, 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 for the asset type of the asset you want to assign to a workflow.

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. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to assign to a workflow and open its "Status" form:
 - a. In the button bar, click **Search**.

- b. In the “Search” form, click the asset type of the asset you want to find.
- c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

- d. In the search results list, navigate to the desired asset and click its status description (listed in the **Status** column).

Content Server displays the asset’s “Status” form, similar to the one below:

Article:GameMicroworldsArticle

Preview
 Inspect
 Edit
 Delete

 Item is in your Active List

Version 3

Name: GameMicroworldsArticle
Description: Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Status: Edited
Modified: Jan 18, 2007 3:55:50 PM by fwadmin

Workflow commands:

Workflow process: This asset is not in Workflow.
Workflow state : There are no current assignments. Workflow is inactive.
Workflow history : This asset has no workflow history.

[Preview this for Destination 1 \(static\)](#)
Approval State: Needs Approval. Not yet approved for publish to Destination 1 (static).
[Approve this asset.](#)

Destination 1 (static) :
Select a Template: Full
File/Path: [Specify Path/Filename, Start points](#)
Start points: Not an export starting point.

[Preview this for Destination 2 \(dynamic\)](#)
Approval State: Needs Approval. Not yet approved for publish to Destination 2 (dynamic).
[Approve this asset.](#)

4. In the asset’s “Status” form, choose **Select Workflow** from the “Workflow commands” drop-down list. The “Select Workflow” form, similar to the one below, opens:

Select Workflow for Article: GameMicroworldsArticle

Article Name: GameMicroworldsArticle
Description: Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers

***Workflow Process:**

Action to Take:

5. In the “Select Workflow” form, choose a workflow process from the “Workflow Process” drop-down list. Optionally, you can enter instructions in the **Action to Take** field; these instructions are for the person receiving the assignment.

6. If the administrator enabled the selection of participants for this assignment, a **Set Participants** button appears next to the “Workflow Process” drop-down list. When that happens, do one of the following:
- If you do not want to choose assignees (a participant who receives an assignment is an assignee) for this assignment, click **Select Workflow**. Content Server assigns the asset to the workflow you selected and gives the assignment to all users whose roles were defined by the administrator as participating in the selected workflow.
 - If you decide to choose the participants you want to give this assignment to, click **Set Participants**.

Content Server displays the “Set Participants” form, similar to the image below:


Set Participants
Please select at least one user from each role

Article Name:	GameMicroworldsArticle										
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers										
Workflow Process:	BF: Normal Article Process										
Participants:	<table border="1"> <thead> <tr> <th>Role</th> <th>Users</th> </tr> </thead> <tbody> <tr> <td>* Approver:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_approver </div> </td> </tr> <tr> <td>* Author:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_author </div> </td> </tr> <tr> <td>* Checker:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_checker </div> </td> </tr> <tr> <td>* Editor:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_editor </div> </td> </tr> </tbody> </table> <div>Select All</div>	Role	Users	* Approver:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_approver </div>	* Author:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_author </div>	* Checker:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_checker </div>	* Editor:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_editor </div>
Role	Users										
* Approver:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_approver </div>										
* Author:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_author </div>										
* Checker:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_checker </div>										
* Editor:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_editor </div>										

Each participant you select in this form becomes an assignee for this assignment. Choose the desired assignees for this assignment by selecting their user names in each of the role lists. You can select multiple user names by **Ctrl-clicking** each user name you want to select. You can also select a range of user names by **Shift-clicking** the first and last user name in the range. When you have chosen the desired assignees, click **Set Participants**.

7. Content Server refreshes the asset's "Status" form. A confirmation similar to the one below is shown at the top of the form:

This step action element will send an email
Assigner name: fwadmin
Object: Asset: Article "GameMicroworldsArticle"
action to take: Fast-track this one.
Assigned name: fwadmin
Assigned role: Author
Email address: fwadmin@company.com

 Workflow definition for this Article is set to: BF: Normal Article Process.

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 these 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

Note

This procedure describes how to set a process deadline via an asset's "Status" form. You can also set a process deadline when you perform the following tasks, assuming you have the right privileges and the option for setting a process deadline is enabled by the administrator for these tasks:

- Placing an asset in workflow (see ["Using Workflow Functions," on page 165](#))
- Creating a workflow group (see ["Setting Up a Workflow Group," on page 187](#))
- Editing a workflow group (see ["Editing or Deleting a Workflow Group," on page 193](#))
- Adding an asset to a workflow group (see ["Adding Multiple Assets to a Workflow Group," on page 191](#))

In such cases, the forms you use to complete these tasks will include a **Set Process Deadline** field.

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset for which you want to set a process deadline and open its "Status" form:
 - a. In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b. In the "My Assignments" list, navigate to the desired asset and click the asset's hyperlinked workflow state name in the **Workflow State** column.
Content Server displays the asset's "Status" form.
4. In the asset's "Status" form, select **Set Process Deadline** from the "Workflow commands" drop-down list.

Note

If you do not see the **Set Process Deadline** function in the "Workflow commands" drop-down list, stop here. The function has not been enabled by the administrator or you do not have the right permissions to access it.

The “Set Process Deadline” form opens:

Set Process Deadline

Name:	GameMicroworldsArticle
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Asset Type:	Article
Workflow Process:	BF: Normal Article Process
Current Process Deadline:	Not Set
*Set Process Deadline:	<input type="radio"/> None <input checked="" type="radio"/> Due <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> (e.g., 14:00 Mar 17 2002)

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

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 via an asset's "Status" form. You can also set an assignment deadline when you perform the following tasks, assuming you have the right privileges and the option for setting an assignment deadline is enabled by the administrator for these tasks:

- Placing an asset in workflow (see ["Using Workflow Functions," on page 165](#))
- Completing an assignment (see ["Finishing Your Assignments," on page 173](#))
- Adding an asset to a workflow group (see ["Adding Multiple Assets to a Workflow Group," on page 191](#))

In such cases, the forms you use to complete these tasks will include a **Set Assignment Deadline** field.

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset for which you want to set an assignment deadline and open its "Status" form:
 - a. In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b. In the "My Assignments" list, navigate to the desired asset and click the asset's hyperlinked workflow state name in the **Workflow State** column.
Content Server displays the asset's "Status" form.
4. In the asset's "Status" form, select **Set Assignment Deadline** from the "Workflow commands" drop-down list.

Note

If you do not see the **Set Assignment Deadline** function in the "Workflow commands" drop-down list, stop here. The function has not been enabled by the administrator or you do not have the right permissions to access it.

The “Set Assignment Deadline” form opens:

Set Assignment Deadline

Name:	GameMicroworldsArticle
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Asset Type:	Article
Workflow Process:	BF: Normal Article Process
State:	BF: Workflow Initiated
Current Assignment Deadline:	2007-1-20 16:30:00
*Set Assignment Deadline:	<input type="radio"/> Use default <input checked="" type="radio"/> Due <input type="text" value="16:30"/> <input type="text" value="Jan"/> <input type="text" value="20"/> <input type="text" value="2007"/> (e.g. 14:00 Mar 17 2002)

5. Enter a date in the prescribed format. The default assignment deadline is set by the administrator in the workflow state definition. For example, in the “Normal Article Process” sample workflow, each state has a duration of one year from the current date and time.
6. Click **Save** to complete the operation.
Content Server redisplay the asset’s “Status” form.

Finishing Your Assignments

After you complete your work for an assignment, you need to notify the system that you are done so the asset can continue to move through the workflow.

To finish your assignment for an asset

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset and open its "Status" form by doing one of the following:
 - **If you are currently working on the asset in its "New" or "Edit" form:**
 - a. Review your work and click **Save** to save the asset.
Content Server displays the asset's "Inspect" form.
 - b. In the asset's "Inspect" form, select **Status** from the drop-down list in the action bar.
 - c. Proceed to [step 4](#) of this procedure.
 - **If you have already completed your work and saved the asset:**
 - a. In the button bar, click **My Work**.
Content Server displays thy "My Work" view, showing the "My Assignments" list.
 - b. In the "My Assignments" list, navigate to the desired asset and click the asset's workflow state in the **Workflow State** column.
Content Server displays the asset's "Status" form.
 - c. Proceed to [step 4](#) of this procedure.
4. In the asset's "Status" form, select **Finish My Assignment** from the "Workflow commands" drop-down list.

Content Server displays the "Finish My Assignment" form containing all of the possible next steps and the states these steps lead to:

Finish My Assignment for Article: GameMicroworldsArticle.

Article Name:	GameMicroworldsArticle
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Workflow Process:	BF: Normal Article Process - BF:Ready for Approval
Assigned User Role:	Checker
*Choose Step -> State:	<input checked="" type="radio"/> BF:Approve -> (null state) <input type="radio"/> BF:Reject for Style -> BF:Ready for Review
Action Taken:	Read through, looks fine. Approved for publishing.
Action to Take:	Publish during next home page update.

5. Complete the form as follows:

- a. Select the next step for the asset.
- 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. (Optional) If setting the assignment deadline is enabled for the next step you chose to take, the **Set Assignment Deadline** field will appear in the “Finish My Assignment” form, as shown below:

*Set Assignment Deadline: ☐ Use default

☒ Due
(e.g., 14:00 Mar 17 2002)

- e. If you want to override the time allotted for the next assignment, use the **Set Assignment Deadline** section 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 state, which will be the default value when you click the **Due** radio button.

Note

This feature appears only if enabled by the workflow administrator. You must also hold an administrative role in the workflow process or otherwise have the right privileges. For more information, see [“Setting an Assignment Deadline,” on page 170](#).

6. Click **Finish My Assignment**.

The “Status” form is updated to reflect the change. The action taken is visible in the **Workflow history** summary. The action to take is visible in the **Workflow state** summary.

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 below:

Choose Assignees

The workflow associated with this asset requires you to select assignees. Select at least one user from each role.

Cancel Set Assignees

Workflow Process: BF: Normal Article Process

Assignees:

Role	Users
* Author:	<div>editor firstsite fwadmin user_author</div>

Cancel Set Assignees

When the form appears, select the desired assignees for each displayed role and click **Set Assignees**. Content Server refreshes the asset’s “Status” form, showing a message confirming the completion of your assignment. The **Workflow state** and **Workflow history** fields in the “Status” form are also updated accordingly.

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. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset for which you want to delegate your assignment and open its "Status" form:
 - a. In the button bar, click **My Work**.

Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b. In the "My Assignments" list, navigate to the desired asset and click its workflow state (listed in the **Workflow State** column).

Content Server displays the asset's "Status" form.

4. In the asset's "Status" form, select **Delegate Assignment** from the "Workflow commands" drop-down list.

Delegate Assignment for Article: GameMicroworldsArticle

Article Name:	GameMicroworldsArticle
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Workflow Process:	BF: Normal Article Process - BF:Workflow Initiated
Assigned User Role:	Author
*Delegate to:	<div> <div>editor</div> <div>firstsite</div> <div>fwadmin</div> </div>
Action Taken:	<div>I'm on vacation until Tuesday. Please take care of this in my absence.</div>

Note

If you do not see the **Delegate Assignment** function in the "Workflow commands" 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.

5. Select the user to whom you want to delegate the assignment. Optionally, enter a comment about your action.
6. Click **Delegate**.
A message confirming the delegation appears at the top of the "Status" form, and the **Workflow state** and **Workflow history** fields on the form are updated accordingly. 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.

To abstain from voting on an assignment

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset for which you want to abstain from voting and open its "Status" form:

- a. In the button bar, click **My Work**.

Content Server displays the “My Work” view, showing the “My Assignments” list.

- b. In the “My Assignments” list, navigate to the desired asset and click its workflow state (listed in the **Workflow State** column).

Content Server displays the asset’s “Status” form.

4. In the asset’s “Status” form, select **Abstain from Voting** in the “Workflow commands” drop-down list.

Content Server displays the “Abstain from Voting” form:

Abstain from voting for Article: GameMicroworldsArticle

Article Name:	GameMicroworldsArticle						
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers						
Workflow Process:	BF: Normal Article Process - BF:Ready for Approval						
Currently Assigned to:	<table border="1"><thead><tr><th>Role</th><th>User</th></tr></thead><tbody><tr><td>Checker</td><td>user_checker</td></tr><tr><td>Approver</td><td>fwadmin</td></tr></tbody></table>	Role	User	Checker	user_checker	Approver	fwadmin
Role	User						
Checker	user_checker						
Approver	fwadmin						
Assigned User Role:	Checker						
Action Taken:	<div>I will let the expert handle this one.</div>						

Note

If you do not see the **Abstain from Voting** function in the “Workflow commands” drop-down list, stop here. You do not have the right permissions to access the function, 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.

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

A message confirming your abstention appears at the top of the “Status” form, and the asset’s **Workflow state** and **Workflow history** in the “Status” form are updated accordingly. 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 vote again on an assignment (to resolve a deadlock)

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset for which you want to vote again and open its “Status” form:
 - a. In the button bar, click **My Work**.
Content Server displays the “My Work” view, showing the “My Assignments” list.
 - b. In the “My Assignments” list, navigate to the desired asset and click its workflow state (listed in the **Workflow State** column).
Content Server displays the asset’s “Status” form.
4. In the asset’s “Status” form, select **Finish My Assignment** from the “Workflow commands” drop-down list.

Content Server displays the “Re-vote My Assignment” form:

Re-vote My Assignment for Article: GameMicroworldsArticle.

Article Name:	GameMicroworldsArticle
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Workflow Process:	BF: Normal Article Process - BF:Ready for Approval
Assigned User Role:	Checker
*Choose Step -> State:	<input type="radio"/> BF:Approve -> (null state) <input checked="" type="radio"/> BF:Reject for Style -> BF:Ready for Review
Action Taken:	After conferring with Steven, I am changing my vote.
Action to Take:	Let's clear up these gray areas.

5. Complete the form as follows:
 - a. Select the new next step for the asset.
 - b. (Optional) In the **Action Taken** field, type a short description of the work that you completed on the asset.
 - c. (Optional) In the **Action to Take** field, type a short suggestion for the next person who will work with the asset.

Note

- 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 177).
- You resolve group deadlocks in the same manner as single-asset deadlocks, except that for a group deadlock all assignees have to vote in agreement on each deadlocked asset in the group.

Removing an Asset from Workflow

You can remove an asset from workflow assuming you have the permissions to do so.

To remove an asset from workflow

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to remove from workflow and open its "Status" form:
 - a. In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b. In the "My Assignments" list, navigate to the desired asset and click its workflow state (listed in the **Workflow State** column).
Content Server displays the asset's "Status" form.
4. In the asset's "Status" form, select **Remove from Workflow** from the "Workflow commands" drop-down list.

Content Server displays the "Remove from Workflow" form:

Remove from Workflow for Article: GameMicroworldsArticle

Article Name:	GameMicroworldsArticle						
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers						
Workflow Process:	BF: Normal Article Process - BF:Ready for Approval						
Currently Assigned to:	<table border="1"><thead><tr><th>Role</th><th>User</th></tr></thead><tbody><tr><td>Checker</td><td>user_checker</td></tr><tr><td>Approver</td><td>fwadmin</td></tr></tbody></table>	Role	User	Checker	user_checker	Approver	fwadmin
Role	User						
Checker	user_checker						
Approver	fwadmin						

5. Click **Remove from Workflow**.

Content Server redisplay the asset's "Status" form, showing a confirmation of the removal at the top of the form. The **Workflow history** section of the asset's "Status" form is updated accordingly.

Viewing an Asset's Participant (Assignee) List

To examine an asset's participant (assignee) list

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset and open its "Status" form by doing one of the following:
 - **If the asset is currently assigned to you to work on:**
 - a. In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b. Navigate to the desired asset and click its workflow state (listed in the **Workflow Status** column).
 - c. Proceed to [step 4](#) of this procedure.
 - **If the asset is not currently assigned to you to work on:**
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section "[Finding Assets](#)," on [page 69](#).
 - d. In the list of search results, navigate to the desired asset and click its status description (listed in the **Status** column).
 - e. Proceed to [step 4](#) of this procedure.

Content Server displays the asset's "Status" form.

4. In the asset's "Status" form, select **Show Participants** from the "Workflow commands" drop-down list.

Content Server refreshes the asset's "Status" form and displays the "Show Participants" summary at the top of the form:

Show ParticipantsArticle: GameMicroworldsArticle

Step	Users Authorized	Users Notified
BF:Reject for Style	user_checker	user_editor
BF:Reject for Error	fwadmin	user_editor
BF:Send for Approval	user_editor	user_checker, fwadmin
BF:Send for Edit Review	user_author	user_editor
BF:StartStep	user_checker, fwadmin, user_author, user_editor	user_author
BF:Approve	user_checker, fwadmin	No Users.

For each step in the workflow process, the "Show Participants" summary displays the following:

- The authorized users – those who currently have the assignment for the asset and are authorized to take the next step using the **Finish My Assignment** function
- The notified users – those who will get the next assignment for the asset

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. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset for which you want to modify the workflow participants and open its "Status" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section "[Finding Assets](#)," on page 69.
 - d. In the list of search results, navigate to the desired asset and click its status description (listed in the **Status** column).
4. In the asset's "Status" form, select **Set Participants** from the "Workflow commands" drop-down list.

Note

If you do not see the **Set Participants** function in the "Workflow commands" drop-down list, stop here. You do not have the permissions to use the function.

Content Server displays the “Set Participants” form, similar to the image below:

Set Participants
Please select at least one user from each role

Article Name:	GameMicroworldsArticle										
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers										
Workflow Process:	BF: Normal Article Process										
Participants:	<table border="1"> <thead> <tr> <th>Role</th> <th>Users</th> </tr> </thead> <tbody> <tr> <td>* Approver:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_approver </div> </td> </tr> <tr> <td>* Author:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_author </div> </td> </tr> <tr> <td>* Checker:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_checker </div> </td> </tr> <tr> <td>* Editor:</td> <td> <div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_editor </div> </td> </tr> </tbody> </table> <div>Select All</div>	Role	Users	* Approver:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_approver </div>	* Author:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_author </div>	* Checker:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_checker </div>	* Editor:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_editor </div>
Role	Users										
* Approver:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_approver </div>										
* Author:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_author </div>										
* Checker:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_checker </div>										
* Editor:	<div> <input type="checkbox"/> editor <input type="checkbox"/> firstsite <input type="checkbox"/> fwadmin <input type="checkbox"/> user_editor </div>										

- Choose the desired assignees for this assignment by selecting their user names in each of the role lists. Each participant you select in this form becomes an assignee in the respective role(s) for this asset. You can select multiple user names by **Ctrl-clicking** each user name you want to select. You can also select a range of user names by **Shift-clicking** the first and last user name in the range.
- When you have selected the desired assignees, click **Set Participants**.

Content Server displays the asset’s “Status” form, including a “Show Participants” summary updated to reflect your changes.

Note

The participants list will be updated as you requested, but added users will 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. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset and open its "Status" form by doing one of the following:
 - **If the asset is currently assigned to you to work on:**
 - a. In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Assignments" list.
 - b. In the "My Assignments" list, navigate to the desired asset and click its workflow state (listed in the **Workflow State** column).
 - **If the asset is not currently assigned to you to work on:**
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
For more information on searching, see the section "[Finding Assets](#)," on [page 69](#).
 - d. In the list of search results, navigate to the desired asset and click its status description (listed in the **Status** column).

Content Server displays the asset's "Status" form.


The "Status" form of the asset contains the **Workflow state** and **Workflow history** sections, as shown below:

Workflow process:		BF: Normal Article Process				
Workflow state :	Assigned to	Assigned by	Assigned date	Action to Take	Step Chosen	Task Status
	user_checker(Checker)	user_editor	2007-01-19 14:36:39	Publish during ne ...	▲ BF:Approve	queued
Workflow history :	user_approver(Approver)	user_editor	2007-01-19 14:36:39	Let s clear up th ...	▲ BF:Reject for Error	queued
	Assigned to	Assigned date	Resolved by	Resolution Date	Action Taken	Task Status
	user_editor(Editor)	2007-01-19 14:35:58	user_editor	2007-01-19 14:36:39		completed
	user_author(Author)	2007-01-19 14:35:35	user_author	2007-01-19 14:35:58		completed
	user_approver(Approver)	2007-01-19 14:30:15	user_approver	2007-01-19 14:34:39	Looks good to me.	completed
	user_checker(Checker)	2007-01-19 14:30:15	user_checker	2007-01-19 14:33:41	Looks good.	completed
	user_editor(Editor)	2007-01-19 14:29:32	user_editor	2007-01-19 14:30:15	Rewrote the secti ...	completed
	user_checker(Checker)	2007-01-19 14:18:12	user_checker	2007-01-19 14:29:32	Read through, loo ...	cancelled
	user_approver(Approver)	2007-01-19 14:18:12	user_approver	2007-01-19 14:29:32	I found some gray ...	completed
	user_editor(Editor)	2007-01-19 14:17:02	user_editor	2007-01-19 14:18:12	Fixed some punctu ...	completed
	user_author(Author)	2007-01-19 14:07:42	user_author	2007-01-19 14:17:02	Added content.	completed

The **Workflow state** and **Workflow history** section contain the following information:

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

This table defines all the columns in the **Workflow state** and **Workflow history** section of the “Status” form:

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. 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.
Action to Take	Instructions from the user who assigned the asset, assuming that person entered instructions in the “Finish My Assignment” form when they finished their assignment (see page 173). “No Comment” appears 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 My 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 as No Comment 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: <ul style="list-style-type: none"> • 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.)

Working with Workflow Groups

Workflow groups enable 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.

The following subsections describe how you create and manage workflow groups:

- [Setting Up a Workflow Group](#)
- [Adding a Single Asset to a Workflow Group](#)
- [Adding Multiple Assets to a Workflow Group](#)
- [Removing Assets from a Workflow Group](#)
- [Editing or Deleting a Workflow Group](#)

Setting Up a Workflow Group

To set up a workflow group

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Workflow**.
Content Server displays the **Workflow Management** console.
4. Click **Create a Workflow Group**.

Content Server opens the “Workflow Group” form as shown below:

Create Workflow Group

***Group Name:**

***Description:**

***Workflow Process:** BF: Normal Article Process Set Participants...

Process Deadline: ☒ Do not set
☐ Set
 (e.g. 14:00 Mar 17 2002)

Add/Remove Assets: ☒ any user
☐ all users in the following roles:
 Analyst
 Approver
 ArtworkAuthor
 ArtworkEditor
 Author

Edit/Delete Group: ☒ any user
☐ all users in the following roles:
 Analyst
 Approver
 ArtworkAuthor
 ArtworkEditor
 Author

Group Deadlock Actions:

Cancel Save

5. Complete the “Workflow Group” form as described in the following table:

Note

Red asterisks denote required fields. You must populate these fields before you can set participants.

Field	Definition
Group Name	Enter a name for the group.
Description	Enter a brief description of the group’s purpose or function.
Workflow Process	Select a workflow process appropriate to the assets being grouped.
Set Participants	Click this button to set the participants (assignees), based on the workflow process you have chosen for the group via the “Set Participants for Group” form. In the form, you must select at least one user for each defined role. After you make your selections, click Set Participants to return to the “Add Workflow Group” form.
Process Deadline	Optionally, set a date by which the asset group is to complete the workflow process, using the prescribed format. For more information, see “ Setting a Process Deadline ,” on page 168. This feature appears only if it is enabled by the workflow administrator, and it is available only if you have the administrator role for the workflow process, or if you otherwise have the right privileges.
Add/Remove Assets	Specify who can add assets to the group and who can remove assets from the group. Select any user, or all users in selected roles. Choose multiple roles by using the Shift-click or Ctrl-click keyboard mouse combination.
Edit/Delete Group	Specify who can edit this group and who can delete the group altogether. Select any user, or all users in selected roles. Choose multiple roles by using the Shift-click or Ctrl-click keyboard-mouse combination.
Group Deadlock Actions	Indicate whether to send e-mail notifications to group members when a deadlock occurs.

6. When you are done filling in the form, click **Save**. The new workflow group definition summary appears:

Workflow Group: Article Group

[Inspect](#) [Edit](#) [Delete](#)

Name: Article Group
Description: Workflow Group for Articles
ID: 1168960675168

Workflow Process: BF: Normal Article Process

Participants:

Role	Users
Approver:	user_approver
Author:	user_author
Checker:	user_checker
Editor:	user_editor

Process Deadline: 2007-1-22 12:0:00

Roles to add/remove assets: _ALL_

Roles to edit/delete group: _ALL_

Group Deadlock Actions: SendDeadlockEmail

Group Contents: This workflow group is empty.

[Add to Group](#)

The group also appears in the **Workflow Groups** section of the Workflow Management console (accessible via the **Workflow** button in the button bar):

Workflow

Please select one of the following items

[Create a Workflow Report](#)

[Create a Workflow Group](#)

Workflow Groups

Name	Description	Workflow Process	items
Article Group	Workflow Group for Articles	BF: Normal Article Process	0

Saved Workflow Reports

There are no Saved Workflow Reports

Adding a Single Asset to a Workflow Group

You must meet the following criteria to add assets to a workflow group:

- You must have the function privileges to add assets to a workflow group, as specified in the group definition.
- You must have permission to take the initial step in the workflow process that you select for the group.
- The assets must be appropriate to the workflow process assigned to the group.
- You cannot add assets that are already in a workflow.

Consult your administrator if you are unsure about any of the above requirements.

To add a single asset to a workflow group

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to add to a workflow group and open its "Status" form:

- a. In the button bar, click **Search**.
- b. In the "Search" form, click the asset type of the asset you want to find.
- c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

Content Server displays a list of search results matching your criteria.

- d. Navigate to the desired asset and click its status name (for example, **Created**).

Content Server displays the asset's "Status" form.

4. In the "Workflow commands" drop-down list, select **Add to Workflow Group**.

Content Server displays the "Add to Workflow Group" form showing the groups to which you can add the asset.

Add to Workflow Group for Article: GameMicroworldsArticleRevised

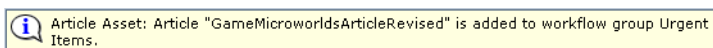
Article Name:	GameMicroworldsArticleRevised
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
* Add to Group:	<input type="radio"/> Article Group BF: Normal Article Process, the workflow group is empty <input checked="" type="radio"/> Urgent Items BF: Normal Article Process, the workflow group is empty
Action to Take:	<div>Fast-track this one!</div>

5. Select the group to which you want to add the asset.

6. (Optional) In the **Action to Take** field, enter instructions for the user(s) who will get the assignments for the asset(s) you are adding to the workflow group.

7. Click **Add to Group**.

Content Server displays a message confirming that the asset has been added to the workflow group you selected.



Adding Multiple Assets to a Workflow Group

You must meet the following criteria to add assets to a workflow group:

- You must have the function privileges to add assets to a workflow group, as specified in the group definition.
- You must have permission to take the initial step in the workflow process that you select for the group.
- The assets must be appropriate to the workflow process assigned to the group.
- You cannot add assets that are already in a workflow.

Consult your administrator if you are unsure about any of the above requirements.

To add multiple assets to a workflow group

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the assets you want to add to the workflow group and add them to your Active List:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

Content Server displays a list of search results matching your criteria.

- d. In the list of results, navigate to the desired assets and select their check boxes.
 - e. Click **Add To My Active List**.
4. In the button bar, click **Workflow**.

Content Server displays the Workflow Management console.

Workflow

Please select one of the following items

[Create a Workflow Report](#)

[Create a Workflow Group](#)

Workflow Groups

Name	Description	Workflow Process	items
Article Group	Workflow Group for Articles	BF: Normal Article Process	0

Saved Workflow Reports

There are no Saved Workflow Reports

5. In the “Workflow Groups” list, select the group to which you want to add your assets. Content Server displays the “Workflow Group” form.
6. In the tree, select the **Active List** tab.
7. In the **Active List** tab, select the assets you want to add to the workflow group.
You can select multiple assets by **Ctrl-clicking** each asset you want to add; you can also select a range of assets by **Shift-clicking** the first and last asset in the range.
8. Click **Add to Group**.

Content Server displays the “Add to Workflow Group” form showing the assets you want to add to the group. Any assets that you cannot add will have error messages next to them explaining why you cannot add them to the group.

Add to Workflow Group

Group Name: Article Group			
Description: Workflow Group for Articles			
* Add to Group:	Type	Name	Description
	Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
	Article	GameMicroworldsArticleRevised	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
			<input checked="" type="checkbox"/>
			WorkflowActive
1 asset can be added to the group			
Action to Take:	Fast-track these!		

9. (Optional) In the **Action to Take** field, enter instructions for the user(s) who will get the assignments for the asset(s) you are adding to the workflow group.
10. Click **Add to Group**.

Content Server displays the “Workflow Group” form showing the newly added assets and a message at the top of the form confirming the action.

Removing Assets from a Workflow Group

You can remove an asset (or assets) from a workflow group provided you have the permissions to do so.

To remove an asset from a workflow group

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the desired asset and open its “Status” form. Do one of the following:

If the asset is currently assigned to you to work on:

- a. In the button bar, click **My Work**.

Content Server displays the “My Work” view, showing the “My Assignments” list.

- b. In the “My Assignments” list, navigate to the desired asset and click its workflow state (listed in the **Workflow State** column).

If the asset is not currently assigned to you to work on:

- a. In the button bar, click **Search**.
- b. In the “Search” form, click the asset type of the asset you want to find.
- c. Enter the desired search criteria (if any) and click **Search**.
- d. For more information on searching, see the section “[Finding Assets](#),” on page 69.
- e. In the list of search results, navigate to the desired asset and click its status description (listed in the **Status** column).

Content Server displays the asset’s “Status” form.

4. In the asset’s “Status” form, select **Remove from Workflow Group** from the “Workflow commands” drop-down list.

Content Server displays the “Remove from Workflow Group” form:

Remove from Workflow Group for Article: GameMicroworldsArticleRevised

Article Name:	GameMicroworldsArticleRevised
Description:	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers
Workflow Process:	BF: Normal Article Process - BF:Workflow Initiated
Workflow Group:	Article Group

5. Click **Remove from Group**.

Content Server redisplay the asset’s “Status” form showing a confirmation that the asset was removed from the group. The workflow details on the form are updated accordingly. Although the asset was removed from the workflow group, it remains in the workflow process to which it was assigned as part of the group.

Note

If you remove the asset from the workflow process, the asset is automatically removed from any workflow groups it is assigned to.

Editing or Deleting a Workflow Group

You can edit or delete a workflow group assuming you have the permissions to do so. If you want to delete a group, it must be empty.

To edit or delete a workflow group

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Workflow**.

4. Content Server displays the Workflow Management console, as shown below:

Workflow

Please select one of the following items

[Create a Workflow Report](#)

[Create a Workflow Group](#)

Workflow Groups

Name	Description	Workflow Process	items
  Urgent Items	Items that must be published as soon as possible.	BF: Normal Article Process	0
  Article Group	Workflow Group for Articles	BF: Normal Article Process	2

Saved Workflow Reports

There are no Saved Workflow Reports

5. In the “Workflow Groups” section of the console, locate the desired workflow group and do one of the following:

Note

If you do not have the permissions to edit or delete workflow groups, or if the workflow group contains assets currently in workflow, the **Edit** and **Delete** icons are disabled.

- To edit the group, click the **Edit** (pencil) icon.
Content Server displays the “Add to Workflow Group” form, prepopulated based on the group definition. Make your edits, remembering to hold the **Ctrl** key if you are making additions to current selections. When you are done, click **Save**.
- To delete the group, click the **Delete** (trashcan) icon. The group must be empty before you can delete it; otherwise, the **Delete** icon will be disabled.

Note

If you add new participants to the workflow group, they do not receive assignments for assets that are already in the group; they will only receive assignments for assets that are added to the group afterwards.

Working with Workflow Reports

Workflow reports allow you to track the progression of assets and user assignments in workflow. They are a convenient mechanism for determining current workflow status. Workflow reports also enable you to perform searches across asset types.

The following subsections describe how you create and manage workflow reports:

- [Running a Workflow Report](#)
- [Saving Workflow Reports](#)
- [Running Saved Workflow Reports](#)
- [Editing Saved Workflow Reports](#)
- [Deleting Saved Workflow Reports](#)

Running a Workflow Report

To set up and run a workflow report

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Workflow**.

Content Server displays the Workflow Management console.

4. In the Workflow Management console, click **Create a Workflow Report**.

Content Server displays the "Create Workflow Report" form. Complete the form as described in the following table:

Table 5: "Create Workflow Report" form fields

Field	Definition
Asset Type	Choose whether to report on all asset types or specific asset types. You can choose multiple assets by using Shift-click or Ctrl-click .
Workflow State	Choose whether to report on all workflow states or specific workflow states. You can choose multiple states by using Shift-click or Ctrl-click . You can choose workflow states from all workflow processes available in the current site.
Assigned to	Choose whether to report on: <ul style="list-style-type: none"> • Any user • Specific users • All users of specific roles You can choose multiple users by using Shift-click or Ctrl-click .

Table 5: “Create Workflow Report” form fields *(continued)*

Field	Definition
Due Date	Choose to report on assignments that have: <ul style="list-style-type: none"> Any due date A due date within a selected time period. The time period can be set from 20 minutes to three days, in 20 minute increments. A date that is past due by a specified time period. The past due period can be set from 20 minutes to three days, in 20-minute increments.
Process Due Date	Choose to report on workflow processes that have: <ul style="list-style-type: none"> Any process due date A process due date within a selected time period. The time period can be set from 20 minutes to three days, in 20 minute increments. A process due date that is past due by a specified time period. The past due period can be set from 20 minutes to three days, in 20-minute increments.
Report Options	Specify how many returned items to report on, ranging in increments from two to 300. Specify to sort the report by: <ul style="list-style-type: none"> Assignee (assigned to) State of the asset (workflow state) when the assignment was made (date assigned)

- When you have completed the form, click **Report**.
- Content Server displays the “Results of Workflow Report” form:

Results of Workflow Report

» [Create a New Workflow Report](#)

Report : all assignments ([Edit This Workflow Report](#))
([Save This Workflow Report](#))

Type	Name	Description	Assigned to	Due	Process Deadline
Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	firstsite(Author)	2d 0h 0m	-
Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	user_author(Author)	2d 0h 0m	-
Article	GameMicroworldsArticleRevised	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	user_author(Author)	1d 23h 52m	-
Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	fwadmin(Author)	2d 0h 0m	-
Article	GameMicroworldsArticle	Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers	editor(Author)	2d 0h 0m	-

The form shows assets matching the report criteria you specified in the “Workflow Report” form in [step 4](#) of this procedure. The criteria are listed at the top of the form for your reference. You can edit these criteria and rerun the report by clicking **Edit This Workflow Report** at the top of the form.

Saving Workflow Reports

When you run a workflow report, you have the option to save the report criteria and make them available to other users. Saving workflow reports means that you can execute them at will with a single click, without having to re-enter the criteria each time.

To save a workflow report

1. Run a workflow report as described in “[Running a Workflow Report](#),” on page 195.
2. In the “Results of Workflow Report” form, click **Save This Workflow Report**.

Content Server displays the “Save Workflow Report” form:

3. Complete the form as follows:
 - a. Enter a name for the report (this is a required field). The name you specify here will appear in the list in the **Workflow Reports** section of the Workflow Management console.
 - b. If you want to share this report with other users holding certain roles, select the **Share this search** box, and then select the roles you want to share this report with. You can select multiple roles by **Ctrl-clicking** each role you want to select. You can also select a range of roles by **Shift-clicking** the first and last roles in the range.
 - c. (Optional) If you want to review or edit the report criteria, click **Edit This Search**. Note that this will require you to run the report again; then you must click **Save This Workflow Report** at the top of the “Results of Workflow Report” form to return to the “Save Workflow Report” form.
4. Click **Save**.

Running Saved Workflow Reports

To run a saved workflow report

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Workflow**.
Content Server displays the Workflow Management console.
4. In the **Workflow Reports** section of the Workflow Management console, locate the report you want to run:

Saved Workflow Reports

Please select the Saved Workflow Report

	Name	Shared
  	Articles in Workflow	shared
  	Urgent Articles	private

5. Click the name, or the **Preview** (eyeball) icon of the workflow report you want to run.
Content Server runs the report and displays the results:

Editing Saved Workflow Reports

To edit a saved workflow report

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Workflow**.
Content Server displays the Workflow Management console.
4. In the **Workflow Reports** section of the Workflow Management console, locate the report you want to edit:

Saved Workflow Reports

Please select the Saved Workflow Report

	Name	Shared
  	Articles in Workflow	shared
  	Urgent Articles	private

5. Click the **Edit** (pencil) icon of the workflow report you want to edit.
Content Server displays the "Create Workflow Report" form with the currently saved criteria selected.
Make your edits, remembering to use the **Ctrl** key if you are making additions to current selections. When you are done, click **Report** to execute the report again.
6. Click **Save This Workflow Report** at the top of the "Results of Workflow Report" form to return to the "Save Workflow Report" form.
7. In the "Save Workflow Report" form, click **Save** to commit the changes to the database.

Deleting Saved Workflow Reports

To delete a saved workflow report

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **Workflow**.
Content Server displays the Workflow Management console.
4. In the **Workflow Reports** section of the Workflow Management console, locate the report you want to delete.
5. Click the **Delete** (trashcan) icon of the workflow report you want to delete.
Content Server displays a confirmation dialog.
6. Click **Delete this Item** to delete the workflow report.

Chapter 6

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:

- [Overview](#)
- [Checking Out Assets](#)
- [Undoing a Checkout](#)
- [Checking In Assets](#)
- [Examining Revision History](#)
- [Reverting to a Previous Version \(Rollback\)](#)

Note

In the Burlington Financial and FirstSite II sample sites, 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, there are three commands that 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.

- **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.

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

Automatic Checkout and Checkin

If you try to edit, delete, roll back, 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 that could be saved (depending on your configuration)

- Overwriting 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**. 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
New	As soon as you open a "New" asset form, the asset is checked out to you and a SYSTEM version is stored. This version has no content. When you save the asset, another (second) version is stored.
Edit	Checks out the asset and prohibits other users from editing or deleting it.
Save	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 New function column. The only difference is that there is more data included in the copied version. The copied asset is displayed in its "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.
Build	Checks out the "Collection" asset and then checks it back in when the build operation completes.
Place	Checks out the "Page" asset and then checks it back in when the place operation completes.
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 an asset, but does not reset the status (created, edited, received, and so forth) as of the previous version, nor does it affect workflow status. If the asset is part of a workflow, anyone who has the appropriate permissions can restore it to a previous version.
- **Revision History.** You or any user can list and examine the revision history of an asset. The revision history also shows who, if anyone, currently has the asset checked out. You can tell whether a version was created by an automatic or manual checkout by looking at the comment section of the revision history. 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.

Revision History Report

	Version	Date	User	Comments	
	7	2007-1-18 10:36:6	fwadmin	Added images.	← Versions created through manual checkout
	6	2007-1-18 10:34:47	fwadmin	Fixed punctuation.	
	5	2007-1-18 10:34:1	fwadmin		← Versions created through automatic checkout
	4	2007-1-18 10:28:30	fwadmin	Version created by Edit	
	3	2007-1-18 10:28:2	fwadmin	Version created by Edit	
	2	2007-1-18 10:13:56	fwadmin	Version created by New	
	1	2007-1-18 10:13:56	SYSTEM		

Checking Out Assets

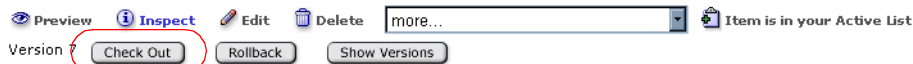
To check out an asset

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to check out and open its "Inspect" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to check out.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

4. In the search results list, navigate to the desired asset and click its **Inspect** icon. Content Server displays the asset's "Inspect" form.
5. In the action bar, click **Check Out**.

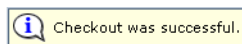
Article: GameMicroworldsArticle



Note

If you don't see the **Check Out** button in the asset's "Inspect" form, stop here. Revision tracking for that asset type is not enabled on your site. If you have questions about revision tracking, contact your CS administrator.

If the asset is already checked out to another user, Content Server displays a message informing you of that fact. If your checkout is successful, Content Server displays the message, "**Checkout was successful**," and updates the checkout status as follows:



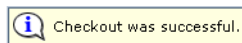
Article: GameMicroworldsArticle



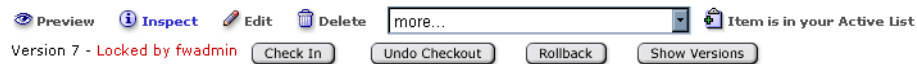
Undoing a Checkout

To undo a checkout

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to undo the checkout for and open its "Inspect" form:
 - a. In the button bar, click **My Work**.
Content Server displays the "My Work" view, showing the "My Checkouts" list.
 - b. In the "My Checkouts" list, navigate to the asset for which you want to undo the checkout, and click its name.
Content Server displays the asset's "Inspect" form.
4. In the action bar, click **Undo Checkout**.



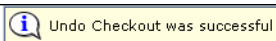
Article: GameMicroworldsArticle



Note

If you don't see the **Undo Checkout** button in the asset's "Inspect" form, revision tracking for that asset type is not enabled on your site.

Content Server displays the message: "**Undo Checkout was successful**;" the asset is returned to the database without a record of this checkout.



Article: GameMicroworldsArticle



Checking In Assets

To check in an asset

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **My Work**.

Content Server displays the “My Work” view, showing the “My Checkouts” list.

4. In the “My Checkouts” list, navigate to the asset you want to check in, and click its **Check in** button.

Content Server displays the “Check In” form:

Check InArticle: GameMicroworldsArticle

Name: GameMicroworldsArticle

Description: Progression of Aura and Holding Power in and of Virtual Worlds Inside Computers

Status: Edited
Version 7 - **Locked by fwadmin**

ID: 1168960674171

Type: Article

Modified: Jan 18, 2007 10:35:18 AM by fwadmin

Please enter a comment for this revision and select "Check In" when done.
Select the "Keep Checked Out" option if you want to keep this checked out.

Comments:

☐ Keep Checked Out

5. (Optional) In the **Comments** text box, enter comments or instructions that pertain to the version that you are checking in. Comments are displayed with the asset title when you view the version history.
6. (Optional) If you want to back up the asset but need to continue working on it, select the **Keep Checked Out** box.
7. Click **Check In**.

A confirmation message appears. Note that the version number has increased by one.

 Asset successfully checked in.

Article: GameMicroworldsArticle

 Preview
  Inspect
  Edit
  Delete

 Item is in your Active List

Version 8

Examining Revision History

To examine an asset's revision history




1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset whose revision history you want to examine and open its "Inspect" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

4. In the search results list, navigate to the desired asset and click its **Inspect** icon.
Content Server displays the asset's "Inspect" form.
5. In the action bar, click **Show Versions**.

Content Server displays the asset's Revision History Report.

Revision History Report

	Version	Date	User	Comments
	8	2007-1-18 10:47:22	fwadmin	Removed references to older titles.
	7	2007-1-18 10:36:6	fwadmin	Added images.
	6	2007-1-18 10:34:47	fwadmin	Fixed punctuation.
	5	2007-1-18 10:34:1	fwadmin	
	4	2007-1-18 10:28:30	fwadmin	Version created by Edit
	3	2007-1-18 10:28:2	fwadmin	Version created by Edit
	2	2007-1-18 10:13:56	fwadmin	Version created by New
	1	2007-1-18 10:13:56	SYSTEM	

To view a specific version of the asset, click the **Inspect** icon next to the desired version. Content Server displays that version's "Inspect" view in a separate window.

Reverting to a Previous Version (Rollback)

















To roll back an asset

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the asset you want to roll back and open its "Inspect" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, click the asset type of the asset you want to roll back.
 - c. Enter the desired search criteria (if any) and click **Search**.

For more information on searching, see the section "[Finding Assets](#)," on page 69.

4. In the search results list, navigate to the desired asset and click its **Inspect** icon. Content Server displays the asset's "Inspect" form.
5. In the action bar, click **Rollback**.

Content Server displays a list of the asset's versions:

Rollback	Version	Date	User	Comments
 	8	2007-1-18 10:47:22	fwadmin	Removed references to older titles.
 	7	2007-1-18 10:36:6	fwadmin	Added images.
 	6	2007-1-18 10:34:47	fwadmin	Fixed punctuation.
 	5	2007-1-18 10:34:1	fwadmin	
 	4	2007-1-18 10:28:30	fwadmin	Version created by Edit
 	3	2007-1-18 10:28:2	fwadmin	Version created by Edit
 	2	2007-1-18 10:13:56	fwadmin	Version created by New
 	1	2007-1-18 10:13:56	SYSTEM	



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

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.

6. In the **Rollback** column, select the version of the asset you want to roll back to.
7. Click **Rollback**.

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

 	9	2007-1-18 10:53:43	fwadmin	Version created by Rollback
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Part 3

Using Engage

This part describes tasks and responsibilities performed by marketers who want to target site visitors for marketing campaigns using Engage, an optional Content Server application.

This part contains the following chapters:

- [Chapter 7, “Engage Overview”](#)
- [Chapter 8, “Grouping Visitors into Segments”](#)
- [Chapter 9, “Creating and Configuring Recommendations”](#)
- [Chapter 10, “Creating Promotions”](#)

Chapter 7

Engage Overview

With Content Server, you can use the flex asset model to create an online catalog offering products and content for sale. If you want to divide your market into segments that define specific groups of customers and then target those segments with personalized promotional or marketing messages, the solution is Engage.

Engage adds merchandising features to Content Server and extends the XML and JSP object methods available for programming your e-commerce site. It enables you to design online sites that gather information about your site visitors and customers, evaluate that information, and then use that information to personalize the product placements and promotional offerings that are displayed for each visitor.

This chapter contains the following sections:

- [About Merchandising Assets](#)
- [Using Segments to Categorize Visitors](#)
- [Making Recommendations to Segmented Visitors](#)
- [Basing Promotions on Buying Patterns](#)

About Merchandising Assets

With Engage, you use merchandising assets to do the following:

- Collect visitor data using the “Visitor Attribute,” “History Attribute,” and “History Definition” assets
- Use that visitor data to define visitor segments (using “Segment” assets)
- Recommend products and content to visitors based on the segments they belong to (using “Recommendation” assets)
- Run promotions that apply to all or specific segments (“Promotion” assets)

Developers and administrators create and manage the visitor data and underlying business logic, while marketers create and manage the “Segment,” “Recommendation,” and “Promotion” assets. As with any of the other Content Server applications, you create and work with assets on the management site. Then, when assets are approved, you publish them to your delivery site.

Marketers and developers are expected to collaborate extensively to implement effective merchandising efforts.

Using Segments to Categorize Visitors

Segments are assets that categorize groups of visitors based on the visitor data that you are gathering about them. You build segments by determining which kinds of visitor data to use as filtering criteria and then setting the values that qualify or disqualify a visitor for the segment.

You use the “Segment Filtering” forms in Engage to categorize groups of visitors based on the visitor attributes, history attributes, and history definitions created by the developers.

Segments are the key to personalization with Engage. When visitors browse your site, the information they submit is used to qualify them for segment membership. When the site displays a page with a recommendation or promotion, Engage determines which segments a visitor belongs to and displays the product recommendations or promotional messages that are designated for those segments.

For detailed information on segments, see [Chapter 8, “Grouping Visitors into Segments.”](#)

Making Recommendations to Segmented Visitors

You create “Recommendation” assets and then configure them by rating assets based on their importance to the segments that you have created.

Recommendations are assets that determine which products or content should be featured or “recommended” on a site page. These assets are rules that are based on the segments the visitors qualify for, and, in some cases, relationships between the product or content assets.

Recommendations have templates. A recommendation returns a list of assets to its template when the template is rendered on a site page. The items in a list of recommended assets are rated according to their importance to the current visitor based on the segments that the visitor belongs to.

For detailed information on recommendations, see [Chapter 9, “Creating and Configuring Recommendations.”](#)

Basing Promotions on Buying Patterns

Promotions are assets that define an offer of value (a discount) to the visitors based on the products that the visitor is buying and the segments that the visitor qualifies for. This value can be offered in several ways:

- A discount off the purchase price of the promoted products
- A discount off the entire value of the shopping cart
- A discount off shipping charges
- A combination discount: a shipping discount with a price or cart discount

Promotions use the same templates as recommendations. You decide which recommendation the promotion overrides, and Engage uses that recommendation's template to render the promotion on the site page.

For detailed information on segments, see [Chapter 10](#), “[Creating Promotions](#).”

Chapter 8

Grouping Visitors into Segments

Segments are assets that categorize visitors into groups on the basis of visitor data that you gather. You build segments by determining which kinds of visitor data to use as filtering criteria and then setting values that qualify or disqualify a visitor for the segment.

This chapter describes segments and presents procedures for creating them. It includes the following sections:

- [About Segments](#)
- [About the Segment Forms](#)
- [Creating Segments](#)
- [Sample Segment Assets](#)
- [Publishing Segments](#)
- [After You Publish](#)

About Segments

Segments are used to create recommendations and promotions. The segments determine which content in the recommendations and promotions visitors qualify for and display that content to the visitors.

Segments are the key to personalization and merchandising with Engage. You, as a marketer, create the visitor segments that the site pages depend on because you know which merchandising messages should be associated with specific visitor segments.

When you create a segment, you specify filtering criteria that a visitor must match in order to be included as a member of that segment. This is comparable to when database or site administrators create a database query, and they specify parameters that a database record must match in order to be included in the results of the query.

Segments and Visitor Data Assets

You build segments by using the visitor data assets as filtering criteria. There are three kinds of visitor data assets: visitor attributes, history attributes, and history definitions.

- **Visitor attributes** hold types of information that specify one characteristic only. For example, there can be attributes named *years of experience*, *job description*, or *number of children*.

When visitors change the data, the new data overwrites the old. For example, if a visitor changes her job description from *analyst* to *marketing specialist*, there is no record of the fact that the visitor used to be an analyst.

- **History attributes** are individual information types that you group together to create a single type of historical record.
- This historical record is a **history definition**. For example, a history definition called *purchases* could be made up of the history attributes *SKU #*, *itemname*, *quantity*, and *price*.

Engage treats the data recorded as a history definition as a whole unit of information. It assigns a timestamp to and stores each instance of the data, which means that you can create segments based on counts or sums of history definitions.

Developers create the visitor data assets based on the kinds of information that the marketing and design teams want to collect and analyze. You and the other marketers can use those assets to create segments that categorize your visitors, and the developers program your site pages to collect and store visitor information.

Developing Segments: Process Overview

There are five general steps for creating segments:

1. **Planning.** A cross-functional design team including developers and marketers determines the data you want to gather about your site visitors.
2. **Creating visitor data assets.** The developers create and define the necessary visitor attributes, history attributes, and history definitions using the forms in Engage.
3. **Creating segments.** You (the marketers) use the “Segment” forms in Engage to categorize visitors on the basis of visitor attributes, history attributes, and history definitions.

4. **Collecting visitor data.** The developers program the appropriate site pages to collect and store visitor data. For example, they might create an online registration form for visitors to fill out with information that qualifies them for segments. When visitors browse your site, the information they submit is stored in the Content Server database.
5. **Segmenting visitors.** Now when visitors browse your site, the information they submit is used to qualify them for segment membership. The promotional messages and recommended products are personalized based on the segments that visitors qualify for.

About the Segment Forms

You will use two forms when creating segments, the “Segment Filtering Criteria” form and the “Segment Definition” form. This section describes these forms.

“Segment Filtering Criteria” Form

The “Segment Filtering Criteria” form displays the visitor data assets that you can use to create segments. In this form you select the criteria that will define your segment.

Categories

The visitor data assets in the “Segment Filtering Criteria” form are organized within categories that are listed across the top of the form. For example:

Segment Filtering Criteria: Classic Movie Fan

Buyer Contact ▶ **Profile** ▶ **User** ▶ **Buyer history** ▶ **History** ▶ **Shopping Cart**

When you click a category, the form displays the visitor attributes or the history definitions in that category.

Because visitor data assets are so varied, developers assign them to categories to organize them. (Developers create categories when they define visitor data assets.) For example, the above image displays the category **Profile**, which developers created for visitor attributes that are related to personal information about the visitors.

Note

The actual categories of visitor data assets will likely differ for your installation, depending on the installation options and what your developers have defined. See your developers if you need information about categories or visitor data assets.

The “Shopping Cart” Form

“Shopping Cart” is listed with the categories on the segment filter forms but the shopping cart is a special, default feature rather than a category of attributes.

Segment Filtering Criteria: Classic Movie Fan

[Buyer Contact](#)
[Profile](#)
[User](#)
[Buyer history](#)
[History](#)
[Shopping Cart](#)

Shopping Cart

☒ **Include** Total value of items in the cart is equal to \$ - \$

☐ **Include** Total count of items in the cart is equal to -

Restrict to specific products:

☒ No restrictions

☐ Restrict to specific items from the tree. (Select items from the appropriate tab in the tree; then click Add):

No products or product categories have been selected.

You can use the “Shopping Cart” form to create segments based on the following kinds of conditions:

- The total value of all the products in the shopping cart
- Whether a specific product is in the shopping cart
- Whether a certain number of products are in the shopping cart
- Whether a certain number of specific products is in the shopping cart

If you want to implement a promotion based on the current state of a visitor’s shopping cart, use this form to build a segment and then use the segment in the promotion.

The “Shopping Cart” form is always available for defining your segments. Therefore, even before your site developers create visitor attributes or history definitions, you can create segments defined by shopping cart information.

The “Segment Definition” Form

While you’re creating a segment, Engage displays each condition (criterion) that you add to the segment in a form similar to the following:

Segment: Classic Movie Fan

***Name:**

Description:

Filtering Criteria:

This segment includes:

▼

Restrict Visitors

<input type="text" value="Include"/> Viewer Preference Slapstick <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Include"/> Viewer Preference Romance <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Buyer Contact"/> <input type="button" value="Include Others"/>
--	--	---

▼

Restrict Visitors

<input type="text" value="Buyer Contact"/> <input type="button" value="Restrict Further"/>

▼

This segment is:

As you add criteria to a row (across the table), you create a more inclusive segment. In the preceding form, the visitor can be interested in either suspense movies or romance movies or both kinds of movies to be included in the segment. In other words, you add more factors that can qualify a visitor for a segment by working across the table, adding criteria to the same row.

As you add criteria to a column (down the table), you create a more restrictive segment. In the following example, a visitor belongs to the segment only if both the criteria are true:

Filtering Criteria:

This segment includes:

▼

Restrict Visitors

<input type="text" value="Include"/> Viewer Preference Slapstick <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Buyer Contact"/> <input type="button" value="Include Others"/>
--	---

▼

Restrict Visitors

<input type="text" value="Include"/> Suitable Ages 18 - 30 <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text" value="Buyer Contact"/> <input type="button" value="Include Others"/>
--	---

▼

Restrict Visitors

<input type="text" value="Buyer Contact"/> <input type="button" value="Restrict Further"/>

▼

This segment is:

The visitor must be interested in slapstick movies and be between the ages of 18 and 30 to belong to the segment. In other words, you add restrictions to a segment by working down the form, adding them to the column.

In summary, segments broaden as you add criteria across the table and narrow as you add criteria down the table.

Creating Segments

Before you create segments, be sure the following tasks have been completed:

- The marketing, design, and development teams met to determine the kinds of data that you want to collect about your visitors.
- The developers created the visitor attributes, history attributes, and history definitions that the cross-functional team decided are necessary.
- You (the marketers) obtained a list or overview of the visitor data assets that were created and you understand what they mean and how they are categorized.

Step 1: Name and Define the Segment

1. If Content Server's interface is not open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **New**.
Content Server displays the "New Asset" form.
4. In the "New Asset" form, select **New Segment**.

Note

If **New Segment** does not appear in the "New Asset" form, stop here. You do not have the permissions to create segments. Consult your administrator for more information on your permissions.

Content Server displays the "New Segment" form:

Segment

*Name:

Description:

Cancel Save Continue

5. In the **Name** field, enter a unique, descriptive name for the segment. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
6. In the **Description** field, enter a brief description of the segment. You can enter up to 128 alphanumeric characters.
7. Click **Continue**.

Content Server displays the “Segment Filtering Criteria” form. The categories of visitor attributes and history definitions you can use to build your segment are listed across the top of the form.

Segment Filtering Criteria: Classic Movie Fan

[Buyer Contact](#)
[Profile](#)
[User](#)
[Buyer history](#)
[History](#)
[Shopping Cart](#)

Profile

Viewer Preference is equal to

Profile Criteria:

- Viewer Preference
- [Suitable Ages](#)

Note that filtering on text strings is case-sensitive unless it is explicitly set not to be so.

8. Do one of the following:
 - If you want to create a segment based on a visitor attribute, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#).
 - If you want to create a segment based on a history definition, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#).
 - If you want to create a segment based on the shopping cart, go to [Step 4: Define the Segment with Shopping Cart Criteria](#).

Step 2: Create Segment Filtering Criteria with Visitor Attributes

1. In the “Segment Filtering Criteria” form, click the name of a category that lists visitor attributes.

Engage displays a list of the attributes in the category.

2. Click the name of the attribute that you want to use to define the segment.
3. The form displays constraint fields that are meaningful for that attribute.
4. Use the form to set the attribute values that include a visitor in the segment or exclude a visitor from the segment.

For example, if the attribute is “age” and you want to include people between the ages of 18 and 30, set the values as follows:

Profile

Suitable Ages is between -

To exclude people who are in that age range, set the values as follows:

Profile

Suitable Ages is between -

To include only people who are 18, set the values as follows:

Profile

Include ▾ Suitable Ages is equal to ▾ 18 - ▾

5. Click Add This Criterion.

The criterion is added to the segment.

Segment: Classic Movie Fan

***Name:**

Description:

Filtering Criteria: This segment includes:

All Visitors

▼

Restrict Visitors

Include ▾ Suitable Ages 18 - 30	Buyer Contact ▾
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="Include Others"/>

▼

Restrict Visitors

Buyer Contact ▾
<input type="button" value="Restrict Further"/>

▼

This segment is:

Classic Movie Fan

6. Do one of the following:

- If you are finished creating this segment, click **Save**.
- To add another criterion to the segment, continue this procedure.

7. Do one of the following:

- To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
- To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.

8. Do one of the following:

- If you selected a visitor attribute category, go back to [step 2](#) of this procedure.
- If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#).
- If you selected **Shopping Cart**, go to [Step 4: Define the Segment with Shopping Cart Criteria](#).

Step 3: Create Segment Filtering Criteria with History Definitions

1. In the “Segment Filtering Criteria” form, click on a category for a history definition.
The “Segment Filtering Criteria” form for history definitions is displayed. It shows the first history definition in the category. For example:

Buyer history - Purchase summary

☒ Include Total --Pick Attribute-- is equal to
☐ Include Count is equal to
☐ Include Earliest date recorded is equal to
 Jan 22 2007 at 4 : 37 PM time zone -05:00
☐ Include Latest date recorded is equal to
 Jan 22 2007 at 4 : 37 PM time zone -05:00

Restrict to a specific time period:

☒ Overall
☐ The last weeks
☐ A specific time period:
 between Jan 22 2007
 at 4 : 37 PM time zone -05:00
 and Jan 22 2007
 at 4 : 37 PM time zone -05:00

History Attributes

☒ No restrictions
☐ Values for selected attributes
 Pick Attribute

Purchase summary attributes:

- [Store ID](#)
- [Product list](#)
- [Amount of sales](#)
- [Number of items](#)

Additional Buyer history criteria:

- Purchase summary

It has three general areas that you use to restrict or filter items:

- The options area at the top of the form
- The time restriction area on the left of the form
- The history attribute restriction area on the right of the form. This section lists the history attributes that define the history definition.

Note

To use a different history definition from the one displayed in the form, select one from the **Additional Criteria** list at the bottom of the form.

2. Use one or more of the following options to create simple or complex criteria by using all three areas in the “Segment Filtering Criteria” form to restrict or filter one item.

Option 1: Filtering Based on a Total

You can define the segment based on a total, such as the total amount spent, a total price, or a total number of items.

For example, a site developer could create a history definition named **Purchase History**, which would be a historical record of purchases made by site visitors. One of the history attributes in this definition could be **number of items**. Using this history definition, a marketer could create a segment based on the total number of items purchased by site visitors.

To define a segment based on a total, complete the following steps:

1. Select the **Total** option and then set the values that include a visitor in the segment or exclude a visitor from the segment.

For instance, the example history definition **Purchase History** could be set to include visitors who have purchased 10 items or more:

☒ Include Total Number of items is greater than or equal to 10

2. Under **Restrict to a specific time period**, specify the time period to use for the total.

For example, to include visitors who bought the specified number of items during the last six months, the time option values for the **Purchase History** history definition could be set as follows:

☒ The last 6 months

To include visitors who bought the specified number of items on a specific day—perhaps a holiday—the values could be set as follows:

☒ A specific time period:

between Jul 4 2006
at 12 : 00 AM time zone -05:00
and Jul 4 2006
at 11 : 59 PM time zone -05:00

3. (Optional) To further restrict this criterion by adding a history attribute to it, go to [Option 5: Adding a History Attribute to Further Define the Segment](#).
4. Click **Add this Criterion**. The criterion is added to the segment.

Filtering Criteria:

This segment includes:
All Visitors

▼

Restrict Visitors

Include (Purchase summary)
Total Number of items >= 10
Last 6 months

Buyer Contact
Include Others

Edit Delete

▼

Restrict Visitors

Buyer Contact
Restrict Further

▼

This segment is:
Classic Movie Fan

5. Do one of the following:
 - If you are finished creating this segment, click **Save**.
 - To add another criterion to the segment, continue this procedure.
6. Do one of the following:
 - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
 - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.
7. Do one of the following:
 - If you selected a visitor attribute category, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#)
 - If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#)
 - If you selected Shopping Cart, go to [Step 4: Define the Segment with Shopping Cart Criteria](#)

Option 2: Filtering Based on a Count

You can define the segment based on the total number of times this history definition was recorded for a visitor.

For instance, using the **Purchase History** history definition described in [Option 1: Filtering Based on a Total](#), a marketer could define a segment based on the number of times **Purchase History** was recorded for a visitor. The effect of this criterion is that Engage would consider how many times a visitor purchased anything instead of considering what they bought or how much they spent.

To define a segment based on a count, complete the following steps:

1. Select the **Count** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

For example, the **Purchase History** history definition could be set to include visitors who have purchased something (anything) at least five times:

☒ Count

2. Under **Restrict to a specific time period**, specify the time period to use for the count.

For example, to include visitors who bought during the last six months, the time option values for the **Purchase History** history definition could be set as follows:

☒ The last

To include visitors who bought something on a specific day—perhaps a holiday—the values could be set as follows:

☒ A specific time period:

between Jul 4 2006
 at 12 : 00 AM time zone -05:00
 and Jul 4 2006
 at 11 : 59 PM time zone -05:00

3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to [Option 5: Adding a History Attribute to Further Define the Segment](#)
4. Click **Add this Criterion**.

The criterion is added to the segment.

Filtering Criteria: This segment includes:
 All Visitors

▼

Restrict Visitors

Include (Purchase summary) Buyer Contact
 Count >= 5
 Last 6 months
 Edit Delete Include Others

▼

Restrict Visitors

Buyer Contact
 Restrict Further

▼

This segment is:
 Classic Movie Fan

5. Do one of the following:
 - If you are finished creating this segment, click **Save**.
 - To add another criterion to the segment, continue this procedure.
6. Do one of the following:
 - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
 - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.
7. Do one of the following:
 - If you selected a visitor attribute category, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#).
 - If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#)
 - If you selected Shopping Cart, go to [Step 4: Define the Segment with Shopping Cart Criteria](#).

Option 3: Filtering Based on the First Time a History Definition Was Recorded

You can define the segment based on the first time the history record was recorded for visitors.

For instance, using the **Purchase History** history definition described in [Option 1: Filtering Based on a Total](#) a marketer could define a segment based on the first time the visitor purchased something—in other words, the first time a **Purchase History** record was recorded for the visitor.

To define the segment based on the first time the definition was recorded, complete the following steps:

1. Select the **Earliest** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

For example, the **Purchase History** history definition could be set to include visitors who purchased something on or before January 1, 2007:

☒ Include is less than or equal to at : time zone

2. Under **Restrict to a specific time period**, specify the time period to use for this condition.

For example, if a marketer wanted to include visitors who purchased something on or before a specific date (in this example, January 1, 2007) but did not want to include them if the date of that purchase was more than two years ago, the **Purchase History** time values could be set as follows:

☒ The last

3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to [Option 5: Adding a History Attribute to Further Define the Segment](#).
4. Click **Add this Criterion**.

The criterion is added to the segment.

Filtering Criteria:

This segment includes:

▼

Restrict Visitors

First date <= January 1, 2007

Last 2 years

▼

Restrict Visitors

▼

This segment is:

5. Do one of the following:
 - If you are finished creating this segment, click **Save**.
 - To add another criterion to the segment, continue this procedure.
6. Do one of the following:
 - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
 - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.
7. Do one of the following:
 - If you selected a visitor attribute category, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#).
 - If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#).
 - If you selected Shopping Cart, go to [Step 4: Define the Segment with Shopping Cart Criteria](#).

Option 4: Filtering Based on the Last Time a History Definition Was Recorded

You can define the segment based on the last time (the most recent time) the history definition was recorded for a visitor.

For instance, using the **Purchase History** history definition described in [Option 1: Filtering Based on a Total](#) a marketer could define a segment based on the most recent time the visitor purchased something—in other words, the last time a **Purchase History** record was recorded for the visitor.

To define the segment based on the last time the history definition was recorded, complete the following steps:

1. Select the **Latest** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

For example, to include visitors who have purchased something since January 1, 2007, the **Purchase History** values could be set as follows:

☒ Include Latest date recorded is greater than
 Jan 1 2007 at 12:00 AM time zone -05:00

2. Under **Restrict to a specific time period**, specify the time period to use for this condition (**Overall** in our example).
3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to [Option 5: Adding a History Attribute to Further Define the Segment](#).

4. Click **Add this Criterion**.

The criterion is added to the segment. For example:

Filtering Criteria:

This segment includes:

▼

Restrict Visitors

<input type="text" value="Include (Purchase summary)"/> <input type="text" value="Last date > January 1, 2007"/>	<input type="text" value="Buyer Contact"/>
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="Include Others"/>

▼

Restrict Visitors

<input type="text" value="Buyer Contact"/>
<input type="button" value="Restrict Further"/>

▼

This segment is:

5. Do one of the following:

- If you are finished creating this segment, click **Save**.
- To add another criterion to the segment, continue this procedure.

6. Do one of the following:

- To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
- To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.

7. Do one of the following:

- If you selected a visitor attribute category, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#).
- If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#).
- If you selected Shopping Cart, go to [Step 4: Define the Segment with Shopping Cart Criteria](#).

Option 5: Adding a History Attribute to Further Define the Segment

You can add a history attribute to create a more complex segment—one that further restricts the count, total, first, or last record by taking a specific attribute into consideration.

To add a history attribute to further define the segment, complete the following steps:

1. Select and configure one of the four options at the top of the form (**Count**, **Total**, **Earliest**, or **Latest**). If you need help with this step, go to one of these procedures:
 - [Option 1: Filtering Based on a Total](#)
 - [Option 2: Filtering Based on a Count](#)

- [Option 3: Filtering Based on the First Time a History Definition Was Recorded](#)
 - [Option 4: Filtering Based on the Last Time a History Definition Was Recorded](#)
2. Under **History Attributes** (on the right side of the form), select the **Values for selected attributes** option.
 3. Under the attribute list for this history definition, click the history attribute that you want to use as a filter.
The form displays constraint fields that are meaningful for that attribute.
 4. Use the constraint fields to set the attribute values that further constrain the criterion.
For example:

☒ Values for selected attributes

Store ID

5. Under **Restrict to a specific time period**, specify the time period to use for this condition.
6. Click **Add this Criterion**.
The criterion is added to the segment.
7. Do one of the following:
 - If you are finished creating this segment, click **Save**.
 - To add another criterion to the segment, continue this procedure.
8. Do one of the following:
 - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
 - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.
9. Do one of the following:
 - If you selected a visitor attribute category, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#).
 - If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#).
 - If you selected Shopping Cart, go to [Step 4: Define the Segment with Shopping Cart Criteria](#).

Option 6: Adding Products to Further Define the Segment

You can add products to create a more complex segment—one that further restricts the count, total, first, or last record by taking specific products into consideration—if the history definition that you use to define this segment has a product list history attribute.

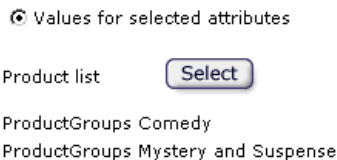
To add a product to the segment definition, complete the following steps:

1. Select and configure one of the four options at the top of the form (**Count**, **Total**, **Earliest**, or **Latest**). If you need help with this step, go to one of these procedures:
 - [Option 1: Filtering Based on a Total](#)
 - [Option 2: Filtering Based on a Count](#)
 - [Option 3: Filtering Based on the First Time a History Definition Was Recorded](#)
 - [Option 4: Filtering Based on the Last Time a History Definition Was Recorded](#)
2. Under **History Attributes** (on the right side of the form), select the **Values for selected attributes** option.
3. Under the attribute list, select **Product List**.

The form displays a **Select** button.

4. In the tree, select the **Product** tab.
5. Click the product that you want to select. To select more than one product use **Ctrl-click** or **Shift-click**.
6. Click **Select**.

Engage lists the product parents and products that you selected. For example:



7. Under **Restrict to a specific time period**, specify the time period to use for this criterion.
8. Click **Add this Criterion**.

The criterion is added the segment.

9. Do one of the following:
 - If you are finished creating this segment, click **Save**.
 - To add another criterion to the segment, continue this procedure.
10. Do one of the following:
 - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
 - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.

11. Do one of the following:

- If you selected a visitor attribute category, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#).
- If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#).
- If you selected Shopping Cart, go to [Step 4: Define the Segment with Shopping Cart Criteria](#).

Step 4: Define the Segment with Shopping Cart Criteria

1. Click **Shopping Cart**.

Engage displays the “Shopping Cart” section of the “Segment Filtering Criteria” form:

Segment Filtering Criteria: Classic Movie Fan

[Buyer Contact](#)
[Profile](#)
[User](#)
[Buyer history](#)
[History](#)
[Shopping Cart](#)

Shopping Cart

☒ **Include** Total value of items in the cart is equal to \$ - \$

☐ **Include** Total count of items in the cart is equal to -

Restrict to specific products:

☒ No restrictions

☐ Restrict to specific items from the tree. (Select items from the appropriate tab in the tree; then click Add).:

No products or product categories have been selected.

2. Do one of the following:

- To define this segment based on the total **value** of the items in a visitor’s shopping cart, select the first option and then set the values. For example, to include visitors who have at least \$50 worth of products in their carts, set the values as follows:

☒ **Include** Total value of items in the cart is greater than or equal to \$50 - \$

- To define this segment based on the total **number** of items in the visitor’s shopping cart, select the second option and then set the values. For example, to include visitors who have three or more items in their carts, set the values as follows:

☒ **Include** Total count of items in the cart is greater than or equal to 3 -

3. To restrict the item count or cart value to specific products in the catalog:

- Select **Restrict to specific items from the tree**.
- In the tree, select the **Product** tab.
- Click the product that you want to select. To select more than one product, use **Ctrl-click** and **Shift-click**.
- In the “Segment Filtering” form, click **Add Selected Items**.

4. Click Add this Criterion.

The shopping cart criterion is added to the segment.

Filtering Criteria: This segment includes:

All Visitors

▼

Restrict Visitors

Include (Shopping Cart) count - >= 3

Buyer Contact

Include Others

Edit Delete

▼

Restrict Visitors

Buyer Contact

Restrict Further

▼

This segment is:

Classic Movie Fan

5. Do one of the following:

- If you are finished creating this segment, click **Save**.
- To add another criterion to the segment, continue this procedure.

6. Do one of the following:

- To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
- To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further**.

7. Do one of the following:

- If you selected **Shopping Cart**, return to [step 2](#) in this procedure.
- If you selected a visitor attribute category, go to [Step 2: Create Segment Filtering Criteria with Visitor Attributes](#).
- If you selected a history definition category, go to [Step 3: Create Segment Filtering Criteria with History Definitions](#).

Sample Segment Assets

When you install Engage with the Burlington Financial sample site, you get two sample segment assets, **BFfrequentvisitors** and **highriskinvestors**, which appear in the **Marketing** tab in the tree. These segments are designed to work in concert with the sample “Recommendation” and “Promotion” assets that also appear in the **Marketing** tab. Use these sample segments as templates for creating segment assets for your site.

Publishing Segments

When your segments are ready, you must approve them so they can be published to your delivery system. Engage can then use the segments to assess visitors and recommend the appropriate items to them.

Be sure to examine or inspect your segments to verify that you configured them correctly before approving them for publishing.

For more information about approving and publishing assets, see [Chapter 4, “Publishing.”](#)

After You Publish

After you have created, verified, and published the segments, you must assign ratings to the products and content that are significant to members of each segment. For details, see [Chapter 9, “Creating and Configuring Recommendations.”](#)

You can also create promotions after you have created segments. For more information, see [Chapter 10, “Creating Promotions.”](#)

Chapter 9

Creating and Configuring Recommendations

Recommendations are assets that determine which assets are featured or “recommended” on a site page. Recommendations calculate which assets to recommend based on the segments the visitors qualify for, and, in some cases, context-based relationships between assets (for example, movies related to each other by genre).

After you create the “Recommendation” assets, (typically, marketing people create “Recommendation” assets), you configure them by rating their child assets based on their importance to the segments that visitors qualify for. Assets are recommended (or are not recommended) based on those ratings. Additionally, the Related Items recommendation defines relationships between assets that allow for cross- or up-selling items according to how those items are related to one another. You determine which assets have those relationships.

This chapter contains the following sections:

- [Recommendation Assets](#)
- [Asset Selection Factors](#)
- [Creating Recommendation Assets](#)
- [Editing Recommendation Assets](#)
- [Configuring Assets to Be Recommended](#)
- [Configuring Asset Relationships Using Related Items Recommendations](#)
- [Verifying Recommendation Assets](#)
- [Publishing Rated Flex Assets](#)

Recommendation Assets

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 confidence, see “[Confidence](#),” on page 243.)

You create segments and then rate the flex assets for their importance to each segment. When a “Recommendation” asset is invoked from a site page, Engage determines which segments the current visitor qualifies for, and then selects the assets that are identified by the recommendation to have the highest rating for those segments. These are the assets that are recommended to the visitor.

Engage provides the following types of recommendations:

- **Static Lists** – operates in two modes, List and Recommendation:
 - In List mode, a Static Lists recommendation holds and returns a single static, preselected list of assets regardless of segments (or whether segments apply at all). Confidence values are automatically assigned to assets on the list based on their position on the list; the first asset receives a confidence value of 100%, the next one 99%, and so on, in descending order.
 - In Recommendation mode, a Static Lists recommendation holds and returns static, preselected lists of recommended assets when the visitor qualifies for segments defined in the recommendation, and also when no segments apply.

When a template invokes the recommendation, the recommendation returns the assets on the static lists. For each asset that you add to a segment’s static list, you can assign a confidence value for In Segment and Out of Segment ratings. (A variant of this type of recommendation was formerly known as “manual.”)

You create a static lists recommendation by selecting assets from your Active List and adding them to each segment’s list (recommendation mode) or the common list (list mode). Because this is a static lists recommendation, the assets in the list(s) remain the same until you change them (or delete them from the database).

- **Dynamic Lists** – references a special asset called a “CSElement” asset, which your developers have coded as a type of program known as an element. When a template invokes the Dynamic Lists recommendation, it executes the element, which returns a list based on the conditions defined in the element. For example, you could create a recommendation named “New Products” whose referenced element selects only those “Product” assets that have been added to the database in the past five days.

You create a Dynamic Lists recommendation by selecting a “CSElement” asset (which contains the logic for generating the list) in the tree. You can then test the selected element by displaying the current list results.

As its name implies, this type of recommendation is dynamic: each time it is invoked by a template, the recommendation executes the element, which regenerates the list, based on the current state of the database.

- **Related Items** – holds the name of a relationship between flex assets that are related to one another based on context (for example, similarly themed movies). When a template invokes a Related Items recommendation, assets are returned (recommended) only if they are manually configured to have the relationship named by the recommendation with the asset that is currently displayed on the page.

Typical relationships between assets are cross-sell and up-sell relationships. For example, a Related Items recommendation named “Cross-Sell” displays a list of science fiction movies on rendered pages that display suspense movies because the marketers determined that people who buy science fiction movies also buy suspense movies.

You create a Related Items recommendation by naming it and specifying that it is a Related Items recommendation. You must then determine which flex assets should have the relationship represented by this recommendation with other flex assets. You assign these relationships in the parent asset’s “New” or “Edit” form, and you assign a confidence value to each asset on the list for each segment.

When the recommendation is rendered by its template, Engage does the following:

- Identifies which assets have the relationship named by the recommendation with the currently displayed asset.
- Examines the ratings for those assets to determine whether those assets are relevant for the current visitor.

The functionality of each of the available types of “Recommendation” assets is summarized in the following table:

Parameter	Static Lists (List Mode)	Static Lists (Recommendation Mode)	Dynamic Lists	Related Items
Ratings (by segment)	Yes	Yes	Yes	Yes
Confidence (by segment)	Determined by asset’s position in the list; no segment distinction.	Yes	Yes	Yes
Selection Criteria	Highest only	Highest, Random	Highest, Random	Highest, Random
Sort Order	Descending by confidence only	Yes	Yes	Yes
Options	<ul style="list-style-type: none"> • Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types 	<ul style="list-style-type: none"> • Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types 	<ul style="list-style-type: none"> • Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types 	<ul style="list-style-type: none"> • Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types
Build	Built by manually adding assets to the list and setting their order in the list.	Built by manually assigning assets to and setting their confidence values for each segment’s list.	Built in realtime by code in the assigned “CSElement” asset.	Built by adding assets to each segment’s list in the parent asset’s “New” and “Edit” forms.

Asset Selection Factors

When Engage determines which assets are the most appropriate to recommend to the current visitor through a given recommendation, it multiplies each asset's **individual rating** in the segment by the **confidence** value assigned to the asset in the recommendation to obtain the asset's **weighted** rating. The following sections describe these concepts in detail.

Ratings

An asset's individual rating establishes how important the asset is to the visitor belonging to a particular segment. You manually assign the rating to the asset in the asset's "New" or "Edit" form.

Note

Only flex assets can be rated for segments. Basic assets do not support ratings and are ignored by the recommendation if placed in it. Consult your administrator to make sure you are only placing flex assets in the recommendations you create.

You can assign three kinds of ratings to an asset:

Rating	Description
In Segment	Used when the current visitor is a member of a specific segment.
Out of Segment	Used when the current visitor is not a member of a specific segment.
When no segment ratings apply	Used when no segments are defined for the current site, or the asset is placed in a recommendation that does not recognize segments (Static Lists recommendation in List mode).

There is also a system default rating for flex assets or flex parents that have not been assigned any of these specific ratings. The system default is set to 50 unless you and your development team decide to change it (through an XML or JSP object method on your site pages). The system default represents the average or middle point in the rating scale for your site, which is why FatWire recommends that you keep the system default rating set to 50.

Range of Ratings

The valid range for individual ratings is 0 through 100. The individual values of 0 and 100 are special and affect an asset's rating as follows:

- An asset rating of 0 for a segment tells Engage to never recommend the asset to a member of the segment. For example, you might want to make sure that your site never recommends PCs or PC software to members of a segment named "Macintosh Users."
- An asset rating of 100 for a segment tells Engage to always recommend the asset to a member of the segment.

Inheritance of Ratings

Flex assets and flex parents inherit “In Segment,” “Out of Segment,” and “When No Segment Ratings Apply” (“fallback”) ratings from their parents. The asset’s or parent’s **final rating** is the average of its individual rating (which is the system default rating if it has no individual rating) plus its inherited rating. The asset’s inherited rating is the final rating of its parent, as illustrated by the following formula:

$$\text{Final rating} = \frac{\text{individual rating} + \text{inherited rating}}{2}$$

where,

individual rating = system default if custom rating is not specified

inherited rating = parent’s final rating

For example:

Asset or Parent	Individual Rating	Inherited Rating	Final Rating
Asset Parent A (top-level group)	70	no rating inherited	70
Asset Parent B (child of Asset Parent A)	60	70	$(60 + 70) / 2 = \mathbf{65}$
Asset 1 (child of Asset Parent B)	95	65	$(95 + 65) / 2 = \mathbf{80}$

If the flex asset inherits a rating for a segment that it does not have an individual rating for, Engage averages the inherited rating with the system default rating (which is typically 50) to determine the final rating. For example:

Asset or Parent	Individual Rating	Inherited Rating	Final Rating
Asset Parent A (top-level group)	80	nothing inherited	80
Asset Parent B (child of Asset Parent A)	none, so the system default of 50 is used	80	$(50 + 80) / 2 = \mathbf{65}$
Asset 1 (child of Asset Parent B)	70	65	$(70 + 65) / 2 = \mathbf{67.5}$

Because the values of 0 and 100 have special functions, the following rules apply to them when inheritance is concerned:

- If either the individual or the inherited rating is 0, the final rating is 0.
- If either the individual or the inherited rating is 100, the final rating is 100 unless the other value is 0.

If the current visitor belongs to more than one segment and the asset has ratings for those segments, the following rules apply:

- The highest of the ratings is the final rating.
- If one of those ratings is 0, the final rating is 0.

Confidence

Confidence in Engage indicates how likely your visitors are to want to view a particular piece of content; thus, Engage uses confidence values assigned to each asset in a recommendation to decide how often a piece of content is to be recommended to the visitor. When a recommendation assesses an asset against a given segment, the asset's rating (either individual or final, depending on the scenario) is multiplied by the confidence value for that segment in the recommendation to produce the asset's weighted rating. The weighted rating is then used by the recommendation to determine how relevant the asset is to the current visitor. Confidence is therefore a scaling factor for the asset's rating. Keep in mind that neither an asset's individual rating nor its confidence value alone can be used to recommend the asset to the visitor; the weighting process applies to all assets assigned to a given recommendation.

Note that when an asset is assessed by multiple recommendations, its respective weighted ratings are calculated independently of one another; that is, the confidence values assigned to the asset in one recommendation do not affect the asset's rating "visible" to the other recommendation. For example, if an asset has an individual rating of 80, a 60% confidence for Segment A in Recommendation 1, and a 90% confidence for Segment A in Recommendation 2, both recommendations use the asset's individual rating of 80 when calculating its respective weighted rating.

The way confidence is assigned depends on the type of recommendation:

- For Static Lists recommendations in List mode, Engage automatically assigns a confidence value to each asset in the list based on the asset's position in the list: the first asset on the list gets a value of 100%, the second 99%, the third 98% and so on, in descending order.
- For Static Lists recommendations in Recommendation mode, you manually assign confidence values to assets for each segment in the recommendation via the recommendation's "New" or "Edit" forms.
- For Related Items recommendations, you manually assign confidence values to assets for each segment in the recommendation via the parent asset's "New" or "Edit" form.
- For Dynamic Lists recommendations, confidence values are returned to Engage by the selected "CSElement" asset and assigned to the respective assets automatically.

Range of Confidence Values

Because confidence is a scaling factor, it is presented as a percentage. The valid range of percentage values is 0 through 100. The values of 0% and 100% affect an asset's rating as follows:

- A confidence value of 0% means the asset will never be returned by that recommendation because the asset's rating is multiplied by 0% (0), which results in a rating of 0.
- A confidence value of 100% means the asset's rating is not scaled or affected by the confidence at all because the asset's rating is multiplied by 100% (1).

Inheritance of Confidence Values

Typically you designate relationships between flex assets and assign a confidence value to that relationship at the parent level because assets inherit the confidence value assigned to their parents by the recommendation.

If the asset has more than one confidence value for the same recommendation, Engage uses the highest value (even if one of those values is 0); it does not average them.

Selection Criteria

Note

List mode Static Lists recommendations do not support the Random selection criterion.

Selection Criteria is a configuration option that allows you to specify how the "Recommendation" asset selects assets to be returned to the template that requests them.

The method that you select for **Selection Criteria** determines how Engage selects assets from the database. There are two **Selection Criteria** methods:

- **Highest** – Engage selects the assets with the highest weighted rating for the current segments (that is, the segments that the current visitor belongs to).
- **Random** – Engage uses a weighted random algorithm (operating on the assets' weighted ratings) to select the assets from the list. Use this selection criterion to design a recommendation that rotates its message, keeping the recommended assets current or different each time a visitor returns to the site page. The selections are still based on the weighted ratings of the assets, however, because this is a weighted random algorithm. The higher the asset's rating for the current segment, the more likely it is to be chosen.

For example, a template is coded to call a recommendation that uses the random selection criteria method for one asset. The possibilities include these three products:

Asset	Weighted Rating
Movie 123	95
Movie ABC	87
Movie RedYellowBlue	65

The probability of the product being selected is its rating divided by the sum of all the ratings (247). Therefore, “Movie 123” has a 38% chance of being selected, “Movie ABC” has a 35% chance, and “Movie RedYellowBlue” has a 26% chance.

Sort Criteria

Sort Criteria is a configuration option that allows you to specify the order in which the template should render the assets returned to it by the recommendation. **Sort Criteria** are applied to the list of returned assets after the **Selection Criteria** method determines which assets to include in the list.

By default, you can sort the list of selected assets by the following attributes:

- “**_ASSETTYPE_**” – sorts the assets in the list alphabetically by asset type. For example, “Article” assets are first, then Image assets, and then the Product assets. (By default, assets are sorted in ascending order; you can reverse the sort order by selecting the **Descending** sort direction.)
- “**_CONFIDENCE_**” – sorts the returned assets by their confidence values.
- “**_RATING_**” – sorts the returned assets by their rating (individual or final, if applicable).

For each attribute, you can specify either ascending or descending sort order.

Sort options specific to the asset types available on your site are set up by your administrator. As an example, a site could be set up to include the following attribute types and corresponding attributes:

- “**Product Attribute**” – sorts by product attributes such as Price, SKU, or Color, and so on (depending on which product attributes are used in your system).
- “**Content Attribute**” – sorts by content attributes such as Headline, Filename, or Author, and so on (depending on which content attributes are used in your system). Note that content attribute means only those attributes that are used to define flex assets, not basic assets.

You can add as many sort options as you want to a recommendation. Engage uses these options in the order in which they appear on the recommendation form.

Asset Recommendation Processes

The following section explains how Engage determines which assets to pass to the template for each type of recommendation.

Static Lists in List Mode

List mode allows you to create a simple static list with the marketing options (such as selection and sort criteria) fixed to specific values (see table on [page 240](#) for this information). When a List mode Static Lists recommendation is invoked by a template, all assets in the list will always be displayed in the order you specify within the “Recommendation” asset.

- If a template invokes a List mode Static Lists recommendation but it does not ask for a specific number of assets, the recommendation examines the ratings of the assets in the recommendations and eliminates assets with a rating of 0. The recommendation then returns all the assets on its list that are not rated 0, regardless of the segment(s) the visitor belongs to.
- When a template invokes a List mode Static Lists recommendation **and** it requests fewer assets than are on the recommendation’s list, Engage recommends the assets with the highest weighted ratings (the random weighted algorithm is not supported in List mode).

The recommendation calculates the weighted ratings of the assets on its list as follows:

1. It examines each asset on the recommendation’s list to determine whether that asset has a “No segment ratings apply” rating.
2. For each asset that has such a rating, Engage multiplies the rating by the confidence value for the asset (determined by the asset’s position in the list). This value is the asset’s weighted rating. For example, if the rating is 90 and the confidence is 75%, it calculates the weighted rating to be 67.5 (that is, 90×0.75).
3. Engage recommends the assets using the **Highest** selection criterion to determine which assets to return (the **Random** selection criterion is not supported in List mode). For more information on selection criteria, see the section “[Selection Criteria](#),” on [page 244](#).

Static Lists in Recommendation Mode

In contrast to List mode, when a **Recommendation** mode Static Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings, not by the list order. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

- If a template invokes a Recommendation mode Static Lists recommendation but it does not ask for a specific number of assets, the recommendation examines the ratings of the assets in the recommendations and eliminates assets with a rating of 0. The recommendation then returns all the assets on its list that are not rated 0 for the current visitor.
- When a template invokes a Recommendation mode Static Lists recommendation **and** it requests fewer assets than are on the recommendation’s list, Engage uses the **Selection Criteria** method specified in the recommendation to determine which assets to return.

The recommendation calculates the weighted ratings of the assets on its list as follows:

1. It determines which segments the current visitor belongs to.
2. It examines each asset on the recommendation's list to determine whether that asset has a rating for any of the segments that apply to the current visitor.
3. For each asset that has a rating for the segment(s) the current visitor belongs to, Engage multiplies the rating by the confidence value assigned in the recommendation for that asset. This value is the asset's weighted rating. For example, if the rating is 90 and the confidence is 75%, it calculates the weighted rating to be 67.5 (that is, 90×0.75).
4. If the **Selection Criteria** method is **Highest**, Engage recommends the assets with the highest weighted ratings. If the **Selection Criteria** method is **Random**, Engage uses a weighted random algorithm to select and return the recommended assets (based on their weighted ratings). For more information on selection criteria, see the section [“Selection Criteria,” on page 244](#).

Dynamic Lists

When a Dynamic Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

- If a template invokes a Dynamic Lists recommendation but it does not ask for a specific number of assets, the recommendation returns all the assets it obtains from the generated list. Engage does not calculate weighted ratings in this case.
- If a template invokes a Dynamic Lists recommendation **and** it requests fewer assets than are on the recommendation's list, Engage uses the **Selection Criteria** method specified in the recommendation to determine which assets to return.

Engage calculates the asset ratings as follows:

1. It determines which segments the current visitor belongs to.
2. It examines each asset returned by the element to determine whether that asset has a rating for any of the segments that apply to the current visitor.
3. For each asset that has an appropriate rating, it multiplies the rating by the confidence value for that asset (from the element). This value is the asset's final rating. For example, if the rating is 90 and the confidence is 0.75, it calculates the final rating to be 67.5 (90×0.75). If the element does not return a confidence value, Engage assigns a confidence value of 1 to each asset in the list.
4. If the **Selection Criteria** method is **Highest**, Engage recommends the assets with the highest final ratings. If the **Selection Criteria** method is **Random**, Engage uses a weighted random selection to return the recommended assets.

Related Items

In this example, a template that displays a product description for a “Movie” asset named Movie 123 invokes a Related Items recommendation named “Cross-Sell.” The template for “Cross-Sell” asks for five assets that have the “Cross-Sell” relationship with Movie 123.

Engage does the following:

1. Determines which segments the current visitor belongs to.

2. Examines the **Related Items** section of the asset form for Movie 123 to determine which assets are listed for the “Cross-Sell” recommendation. It also examines the related assets for all parents of Movie 123.
3. Creates a preliminary list of all “Movie” and “Product” assets that have the “Cross-Sell” relationship with Movie 123. (This list includes all the “Product” assets that inherited this relationship from their parents.) This list also determines the confidence value for each asset.
4. Examines the **Ratings** section on the asset forms for all of the “Movie” and “Products” assets on the preliminary list.
5. Constrains the preliminary list to include only those “Movie” and “Product” assets that have applicable ratings for the segments that the current visitor belongs to.
6. Multiplies the rating by the confidence for each asset on the constrained list.
7. If the **Selection Criteria** method is **Highest**, Engage recommends the five assets with the highest final ratings. If the **Selection Criteria** method is **Random**, Engage uses a weighted random algorithm (operating on the assets’ weighted ratings) to return the five recommended assets.

Creating Recommendation Assets

Note

Typically, marketing people create “Recommendation” assets and set confidence values for assets referenced by Static Lists and Related Items recommendations. (Confidence for Dynamic Lists recommendations is coded into the template that renders the assets being recommended).

Business users assign individual ratings to assets referenced by recommendations created by marketing.

Recommendation Development Overview

The basic steps for setting up recommendations are as follows:

1. Designers and developers meet with the marketing team to define all the merchandising messages that you want to display on your site and to plan how to represent those messages using recommendation and promotion assets.
2. The designers and developers design and code templates for the recommendations. If Dynamic Lists recommendations will be used, they also write “CSElement” assets designed to generate dynamic lists.
3. Marketing then uses Engage Recommendation forms to create “Recommendation” assets (that is, name and configure the recommendations).
4. Using the Engage flex asset forms, you rate how important the assets are to each segment, and, therefore, to the individual visitors who become members of those segments. (Typically, you assign ratings to flex parents instead of to individual flex assets.)

For each Related Items recommendation, you assign to flex assets the assets with relationships that are defined by that recommendation. (Typically, you specify relationships for flex parents instead of for individual flex assets.)

This section describes how to create and configure “Recommendation” assets ([step 3](#) above). The section “[Configuring Assets to Be Recommended](#),” on [page 269](#) describes how to assign ratings to assets and how to assign flex assets to flex parent assets via the relationships defined in a Related Items recommendation ([step 4](#) above).

This section covers the following procedures:

- [Creating Static Lists Recommendations in List Mode](#)
- [Creating Static Lists Recommendations in Recommendation Mode](#)
- [Creating Dynamic Lists Recommendations](#)
- [Creating Related Items Recommendations](#)

Creating Static Lists Recommendations in List Mode

List mode allows you to create a simple static list with the marketing options (such as selection and sort criteria) fixed to specific values (see table on [page 240](#) for this information). When a List mode Static Lists recommendation is invoked by a template, all assets in the list will always be displayed in the order you specify within the “Recommendation” asset.

To create a Static Lists recommendation in List mode

Note

You can click **Save** as you progress through the sections of the “New Recommendation” form in this procedure to save the changes you have made up to and in that section.

Before you can assign assets to a recommendation, you should add the source asset(s) to your Active List for easy retrieval during the creation of the recommendation.

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the assets to be included in the recommendation and add them to your Active List:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, select the asset type of the asset(s) you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
 - d. In the search results list, navigate to the asset(s) you want to add to your Active List, and select the check box(es) next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)
 - e. When you have selected your assets, click **Add To My Active List**.

For more information on searching for assets and building your Active List, see the sections “[Finding Assets](#),” on page 69 and “[Saving Search Results](#),” on page 76.

4. In the button bar, click **New**.
Content Server displays the “New Asset” form.
5. In the “New Asset” form, click **New Recommendation**.

Content Server displays the “New Recommendation” form. Notice the names of the form’s sections near the top. When you create a new “Recommendation” asset, the **Name** section of the form is displayed.

Recommendation:

Name	Type	Options	Build	Selection	Sort
*Name:					
Description:					
Subtype:	(no subtype)				
Template:	FeatureFund				
Mode:	<input checked="" type="radio"/> List <input type="radio"/> Recommendation				

Note

When creating or editing a “Recommendation” asset, you can switch between the sections of the “New” or “Edit” form by clicking the name of the section you want to switch to.

6. In the **Name** section of the “New Recommendation” form, do the following:
 - a. In the **Name** field, enter a unique, descriptive name for the list. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
 - b. In the **Description** field, enter a brief description of the list. You can enter up to 128 alphanumeric characters.
 - c. In the “Subtype” drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).
 - d. In the “Template” drop-down list, select a template for the recommendation.

Note

If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations on your site. Consult your developers for information on recommendation templates.

- e. In the **Mode** field, select the **List** radio button.
- f. Click **Continue**.

Content Server displays the “Options” section of the “New Recommendation” form:

Recommendation:

► Name **Options** ► Build

Options:

- ☒ Bring back children of returned assets.
- ☐ Do NOT bring back children of returned assets.
- Hint: If this recommendation brings back children of returned assets, an unknown will be recorded for the containing page.

- ☒ Promotions can override this recommendation.
- ☐ Promotions cannot override this recommendation.
- Hint: If promotions can override this recommendation, an unknown dependency will be recorded for the containing page.

- ☒ This recommendation applies to all asset types.
- ☐ This recommendation applies to the following asset types:

Article Article (Flex) Attribute Editor CSElement Collection Content Attribute Content Definition Content Parent Content Parent Definition Drill Hierarchy	Add Remove	
---	---------------	--

Cancel Save Continue

7. In the “Options” section, set the options appropriately for the list’s intended purpose. When you are done, click **Continue**.

Content Server displays the **Build** section of the “New Recommendation” form:

8. In the tree, click the **Active List** tab and select the assets you want to add to the list. You can select multiple assets by **Ctrl-clicking** each desired asset; you can also select a range of assets by **Shift-clicking** the first and last assets in the range.
9. Click **Add Selected Items**.
10. (Optional) You can change the order in which the assets in the list are organized by selecting the asset(s) in the list and clicking the up or down arrow button to move the asset(s) up or down the list. You can select multiple assets by **Ctrl-clicking** each desired asset; you can also select a range of assets by **Shift-clicking** the first and last assets in the range.
11. Click **Save**.

Content Server displays the new recommendations’s “Inspect” form.

Creating Static Lists Recommendations in Recommendation Mode

In contrast to List mode, when a Recommendation mode Static Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings, not by the list order. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

Keep the following in mind:

- If you are going to use segments, make sure you know which assets belong in which segments.
- If the segments you need do not exist, you can create them (assuming you have the appropriate permissions). See [Chapter 8, “Grouping Visitors into Segments”](#) for information on creating and configuring segments.
- You should know in advance the confidence values (in segment, out of segment, and when no segments apply) you will assign to the assets you are adding to the list.

Before you can assign assets to a recommendation, you should add the source asset(s) to your Active List for easy retrieval during the creation of the recommendation.

To create a Static Lists recommendation in Recommendation mode

Note

You can click **Save** as you progress through the sections of the “New Recommendation” form in this procedure to save the changes you have made up to and in that section.

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the assets to be included in the recommendation and add them to your Active List:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, select the asset type of the asset(s) you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
 - d. In the search results list, navigate to the asset(s) you want to add to your Active List, and select the check box(es) next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)
 - e. When you have selected your assets, click **Add To My Active List**.

For more information on searching for assets and building your Active List, see the sections “[Finding Assets](#),” on page 69 and “[Saving Search Results](#),” on page 76.

4. In the button bar, click **New**.
5. Content Server displays the “New Asset” form.
6. In the “New Asset” form, click **New Recommendation**.

Content Server displays the “New Recommendation” form. Notice the names of the form’s sections near the top. When you create a new “Recommendation” asset, the **Name** section of the form is displayed first:

Recommendation:

Name	Type	Options	Build	Selection	Sort
*Name:					
Description:					
Subtype:	(no subtype)				
Template:	FeatureFund				
Mode:	<input type="radio"/> List <input checked="" type="radio"/> Recommendation				

Note

When creating or editing a “Recommendation” asset, you can switch between the sections of the “New” or “Edit” form by clicking the name of the section you want to switch to.

7. In the **Name** section of the “New Recommendation” form, do the following:
 - a. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
 - b. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.
 - c. In the “Subtype” drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).
 - d. In the “Template” drop-down list, select a template for the recommendation.

Note

If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

- e. In the **Mode** field, select the **Recommendation** radio button.
- f. Click **Continue**.

Content Server displays the **Type** section of the “New Recommendation” form:

Name	Type	Build	Selection	Sort
Recommendation Type: <input type="radio"/> Related Items (generated by an element) <input checked="" type="radio"/> Static Lists (optionally by segment) <input type="radio"/> Dynamic Lists (generated by an element)				

8. In the **Type** section of the “New Recommendation” form, do the following:
 - a. Select **Static Lists**.
 - b. Click **Continue**.

Content Server displays the **Options** section of the “New Recommendation” form:

Recommendation:

► Name **Options** ► Build

Options:

☒ Bring back children of returned assets.

☐ Do NOT bring back children of returned assets.

Hint: If this recommendation brings back children of returned assets, an unknown will be recorded for the containing page.

☒ Promotions can override this recommendation.

☐ Promotions cannot override this recommendation.

Hint: If promotions can override this recommendation, an unknown dependency will be recorded for the containing page.

☒ This recommendation applies to all asset types.

☐ This recommendation applies to the following asset types:

Article
 Article (Flex)
 Attribute Editor
 CSElement
 Collection
 Content Attribute
 Content Definition
 Content Parent
 Content Parent Definition
 Drill Hierarchy

9. In the **Options** section of the “New Recommendation” form, do the following:
 - a. Set the options appropriately for the recommendation’s intended purpose.
 - b. Click **Continue**.

Content Server displays the **Build** section of the “New Recommendation” form:

Recommendation: Static List

► Name ► Type ► Options **Build** ► Selection ► Sort

Static Lists:

New Static List: <Select Segment>

If No Segments Apply:

Item Name	Confidence
-- No items specified --	

Hint: Select items from the tree, then click Add Selected Items.

10. In the **Build** section of the “New Recommendation” form, do the following:

- a. In the “New Static List” drop-down list, select a segment.

Content Server creates a new static list for the segment and displays it in the form.

- b. In the tree, click the **Active List** tab and select the assets you that you want to add to this segment’s list. You can select multiple assets by **Ctrl-clicking** each asset, or select a range of assets by **Shift-clicking** the first and last asset in the range.

- c. Click **Add Selected Items**.
- d. Assign a confidence value for each asset, both **In Segment** and **Out of Segment**. Confidence is a weighting factor for the recommendation to use in determining which assets to return for the current visitor when that visitor is a member of the segment and when that visitor is not a member of the segment. The defaults are 100% and 0% respectively.

For additional information, see “[Confidence](#),” on page 243.

- e. Repeat [steps a – d](#) for as many segments as you want to include. After you select a segment, it no longer appears in the drop-down list.
- f. (Optional) Repeat [steps b – d](#) for the **If No Segments Apply** category and assign confidence values as appropriate.

The completed form will look similar to the following:



Recommendation:

► Name ► Type ► Options **Build** ► Selection ► Sort

Static Lists:

New Static List:



Segment: Bffrequentvisitors

Item Name	In Segment Confidence	Out of Segment Confidence
 ASP-A56-2001Mar9 (Article)	<input type="text" value="100"/> %	<input type="text" value="0"/> %
 AMD-A580-2001Mar9 (Article)	<input type="text" value="85"/> %	<input type="text" value="15"/> %

 Add Selected Items

Hint: Select items from the tree, then click Add Selected Items.


Segment: highriskinvestors


Item Name	In Segment Confidence	Out of Segment Confidence
 DJ Index (Product)	<input type="text" value="100"/> %	<input type="text" value="0"/> %
 Convertible Bond (Product)	<input type="text" value="100"/> %	<input type="text" value="0"/> %

 Add Selected Items

Hint: Select items from the tree, then click Add Selected Items.

If No Segments Apply:

Item Name	Confidence
 Index Article (Article)	<input type="text" value="100"/> %

 Add Selected Items

Hint: Select items from the tree, then click Add Selected Items.

- g. Click **Continue**.

Content Server displays the **Selection** section of the “New Recommendation” form:

▶ Name ▶ Type ▶ Options ▶ Build **Selection** ▶ Sort

Selection Criteria: ☐ Random (weighted by rating)
☒ Highest Rating

Cancel Save Continue

11. In the **Selection** section of the “New Recommendation” form, do the following:
 - a. Choose the selection criterion for the recommendation. For more information, see the section “[Selection Criteria](#),” on page 244.
 - b. Click **Continue**.

Content Server displays the **Sort** section of the “New Recommendation” form:

Recommendation: Static List

▶ Name ▶ Type ▶ Options ▶ Build ▶ Selection **Sort**

New Sort Criteria:

Attribute Type	Attribute	Direction
<Pick Type>	<Pick Attribute>	<input checked="" type="radio"/> Ascending
		<input type="radio"/> Descending

Add Sort Criteria

Sort Criteria:

Cancel Save

12. In the **Sort** section of the “New Recommendation” form, do the following:
 - a. In the “Attribute Type” drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.
 For more information, see the section “[Sort Criteria](#),” on page 245.
 - b. In the “Attribute” drop-down list, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in [step a](#), the Attribute field will contain the options, **_ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.
 Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.
 - c. In the **Direction** field, choose whether the sort direction should be ascending or descending.
 - d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.
 - e. (Optional) To add more sort criteria, repeat [steps a – d](#). Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.
 - f. When you have selected the desired sort criteria, click **Save**. Content Server displays the recommendation’s “Inspect” form.

Creating Dynamic Lists Recommendations

Note

Before beginning this procedure, Consult your developers to find out which “CSElement” asset(s) should be used with the Dynamic Lists recommendation(s) you want to create.

To create a Dynamic Lists recommendation

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **New**.

Content Server displays the “New Asset” form.

4. In the “New Asset” form, click **New Recommendation**.

Content Server displays the “New Recommendation” form. Notice the names of the form’s sections near the top. When you create a new “Recommendation” asset, the **Name** section of the form is displayed first:

Recommendation:

Name	Type	Options	Build	Selection	Sort
*Name:					
Description:					
Subtype:	(no subtype)				
Template:	FeatureFund				
Mode:	<input type="radio"/> List <input checked="" type="radio"/> Recommendation				

Note

When creating or editing a “Recommendation” asset, you can switch between the sections of the “New” or “Edit” form by clicking the name of the section you want to switch to.

5. In the **Name** section of the “New Recommendation” form, do the following:
 - a. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
 - b. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.
 - c. In the “Subtype” drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty.

- d. In the “Template” drop-down list, select a template for the recommendation.

Note

If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

- e. In the **Mode** field, select the **Recommendation** radio button.
f. Click **Continue**.

Content Server displays the **Type** section of the “New Recommendation” form:

Name	Type	Options	Build	Selection	Sort
Recommendation Type: <input type="radio"/> Related Items (defined on asset forms) <input type="radio"/> Static Lists (optionally by segment) <input checked="" type="radio"/> Dynamic Lists (generated by an element)					
<div> <div>Cancel</div> <div>Save</div> <div>Continue</div> </div>					

6. In the **Type** section of the “New Recommendation” form, do the following:
a. Select **Dynamic Lists**.
b. Click **Continue**.

Content Server displays the **Options** section of the “New Recommendation” form:

Name	Type	Options	Build	Selection	Sort
Recommendation: Dynamic List					
Options: <input checked="" type="radio"/> Bring back children of returned assets. <input type="radio"/> Do NOT bring back children of returned assets. <small>Hint: If this recommendation brings back children of returned assets, an unknown will be recorded for the containing page.</small> <hr/> <input checked="" type="radio"/> Promotions can override this recommendation. <input type="radio"/> Promotions cannot override this recommendation. <small>Hint: If promotions can override this recommendation, an unknown dependency will be recorded for the containing page.</small> <hr/> <input checked="" type="radio"/> This recommendation applies to all asset types. <input type="radio"/> This recommendation applies to the following asset types: <div style="display: flex; align-items: flex-start;"> <div style="flex: 1;"> <div> Article Article (Flex) Attribute Editor CSElement Collection Content Attribute Content Definition Content Parent Content Parent Definition Drill Hierarchy </div> <div style="margin-top: 10px;"> <div>Add</div> <div>Remove</div> </div> </div> <div style="flex: 1; border: 1px solid black; margin-left: 10px;"></div> </div>					
<div> <div>Cancel</div> <div>Save</div> <div>Continue</div> </div>					

7. In the **Options** section of the “New Recommendation” form, do the following:
 - a. Set the options appropriately for the recommendation’s intended purpose.
 - b. Click **Continue**.

Content Server displays the **Build** section of the “New Recommendation” form:

Recommendation: Dynamic List

Name	Type	Options	Build	Selection	Sort
CSElement: -- No element specified --					
<input type="button" value="Add Selected Element"/>					
Hint: Select one element from the tree, then click Add Selected Element.					
<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Continue"/>					

8. In the **Build** section of the “New Recommendation” form, do the following:
 - a. In the tree, click the **Design** tab and select the “CSElement” asset you want your recommendation to use. Note that you can select only one “CSElement” asset.
 - b. Click **Add Selected Element**.

Content Server refreshes the form showing the added “CSElement” asset:

Recommendation: Dynamic List

Name	Type	Options	Build	Selection	Sort
CSElement: dynamiclist					
<input type="button" value="Update Selected Element"/>					
Hint: Select one element from the tree, then click Update Selected Element.					
<input type="button" value="Display Results"/>					
Hint: Click Display Results to see the list generated by the selected element.					

If you want to replace the currently chosen “CSElement” asset, select another asset in the **Design** tab and click **Update Selected Element** to replace the current one.

- c. Click **Display Results** to view the list that the element will currently generate.

A form similar to the following appears:

Hint: Select one element from the tree, then click Update Selected Element.

Hint: Click Display Results to see the list generated by the selected element.

Results:

Asset Name	Asset ID	Asset Type	Confidence
Income (Class A, Max Load)	993403844495	Products	100.0%
Domestic Equity Portfolio	993403844773	Products	100.0%
Emerging Markets Equity Fund	993403845336	Products	100.0%
Small Cap	993403845588	Products	100.0%
Mid Cap Stock Fund	993403845840	Products	100.0%
Global Fund	993403846085	Products	100.0%
EastSouth Fund	993403846326	Products	100.0%
Tech Titans	993403846578	Products	100.0%
Financial Titans Fund	993403846823	Products	100.0%
Large Cap Growth (Class A, Max Load)	993403847128	Products	100.0%
International Titan Funds	993403847744	Products	100.0%
Ero Titans	993403847970	Products	100.0%
Worldwide Spectrum	993403848918	Products	100.0%
Small Cap (Class A, Max Load)	993403849555	Products	100.0%
Convertible Bond	993403849979	Products	100.0%
Small Cap Growth	993403850319	Products	100.0%
DJ Index	993403851044	Products	100.0%
Ultra Risk Int'l	993403851295	Products	100.0%
Small Gain Tax Hedge	993403851802	Products	100.0%
Energy Sector	993403852228	Products	100.0%
Financial Services Specialty	993403852438	Products	100.0%
Health Care	993403852646	Products	100.0%
Communications	993403853236	Products	100.0%
Utilities Specialist	993403853448	Products	100.0%
International Index Fund	993403854142	Products	100.0%
Select Industrial Equipment	993403855059	Products	100.0%
Tax-Managed U.S. 5-10 Value	993403855278	Products	100.0%
Doculab Super Fund	993559376745	Products	100.0%

The element is required to return a list of a specific type containing these columns:

- **Asset Name** – the name of the asset, which is guaranteed to be unique for the site
- **Asset ID** – generated identifier of the asset
- **Asset Type** – the name of the asset type (for example, “Products”)
- **Confidence** – a value that is either calculated by the developer, or assigned by Engage as 1 (100%)

Remember that the list is dynamic, so the list contents are likely to change if assets have changed in your database when the recommendation is invoked by the template. If you select another “CSElement” asset from the tree, the currently displayed list results will be cleared.

When you click **Display Results**, several other outcomes are possible:

- The element fails to return the expected list type.
- The returned list is missing a required column.
- The element encountered the displayed error condition.
- The element fails to return any assets (not necessarily an error; the expected assets may not yet exist, in which case, you should contact your administrator).

If you encounter any of these conditions, select another “CSElement” asset and try again or consult your developers to troubleshoot the faulty “CSElement” asset.

d. Click **Continue**.

Content Server displays the **Selection** section of the “New Recommendation” form:

The screenshot shows the 'Selection' section of the 'New Recommendation' form. At the top, there are tabs: 'Name', 'Type', 'Build', 'Selection' (which is active), and 'Sort'. Below the tabs, the text 'Selection Criteria:' is followed by two radio button options: 'Random (weighted by rating)' and 'Highest Rating'. The 'Highest Rating' option is selected.

9. In the **Selection** section of the “New Recommendation” form, do the following:
 - a. Choose the selection criterion for the recommendation. For more information, see the section “[Selection Criteria](#),” on page 244.
 - b. Click **Continue**.

Content Server displays the **Sort** section of the “New Recommendation” form:

The screenshot shows the 'Sort' section of the 'New Recommendation' form. At the top, there are tabs: 'Name', 'Type', 'Build', 'Selection', and 'Sort' (which is active). Below the tabs, the text 'New Sort Criteria:' is followed by three columns: 'Attribute Type', 'Attribute', and 'Direction'. Under 'Attribute Type' is a drop-down menu with '<Pick Type>' selected. Under 'Attribute' is a drop-down menu with '<Pick Attribute>' selected. Under 'Direction' are two radio button options: 'Ascending' (selected) and 'Descending'. Below these fields is a button labeled 'Add Sort Criteria'. At the bottom of the section are two buttons: 'Cancel' and 'Save'.

10. In the **Sort** section of the “New Recommendation” form, do the following:
 - a. In the “Attribute Type” drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

For more information, see the section “[Sort Criteria](#),” on page 245.

- b. In the “Attribute” drop-down list, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in [steps a](#), the Attribute field will contain the options, **_ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

- c. In the **Direction** field, choose whether the sort direction should be ascending or descending.
 - d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.
 - e. (Optional) To add more sort criteria, repeat [steps a – d](#). Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.
 - f. When you have selected the desired sort criteria, click **Save**.

Content Server displays the recommendation’s “Inspect” form.

Creating Related Items Recommendations

To create a Related Items recommendation

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **New**.

Content Server displays the “New Asset” form.

4. In the “New Asset” form, click **New Recommendation**.

Content Server displays the “New Recommendation” form. Notice the names of the form's sections near the top. When you create a new “Recommendation” asset, the **Name** section of the form is displayed first:

Recommendation:

Name	Type	Options	Build	Selection	Sort
*Name:					
Description:					
Subtype:	(no subtype)				
Template:	FeatureFund				
Mode:	<input type="radio"/> List	<input checked="" type="radio"/> Recommendation			

Cancel Save Continue

Note

When creating or editing a “Recommendation” asset, you can switch between the sections of the “New” or “Edit” form by clicking the name of the section you want to switch to.

5. In the **Name** section of the “New Recommendation” form, do the following:
 - a. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
 - b. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.
 - c. In the “Subtype” drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).
 - d. In the “Template” drop-down list, select a template for the recommendation.

Note

If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

- e. In the **Mode** field, select the **Recommendation** radio button.

- f. Click **Continue**

Content Server displays the **Type** section of the “New Recommendation” form:

▶ Name	Type	▶ Build	▶ Selection	▶ Sort
Recommendation Type:				
<input checked="" type="radio"/> Related Items (generated by an element)				
<input type="radio"/> Static Lists (optionally by segment)				
<input type="radio"/> Dynamic Lists (generated by an element)				

6. In the **Type** section of the “New Recommendation” form, do the following:
 - a. Select the **Related Items** radio button.
 - b. Click **Continue**.

Content Server displays the **Options** section of the “New Recommendation” form:

Recommendation: Related Items

Name	Type	Options	Build	Selection	Sort
Options:					
<input checked="" type="radio"/> Bring back children of returned assets. <input type="radio"/> Do NOT bring back children of returned assets. Hint: If this recommendation brings back children of returned assets, an unknown will be recorded for the containing page.					
<input checked="" type="radio"/> Promotions can override this recommendation. <input type="radio"/> Promotions cannot override this recommendation. Hint: If promotions can override this recommendation, an unknown dependency will be recorded for the containing page.					
<input checked="" type="radio"/> This recommendation applies to all asset types. <input type="radio"/> This recommendation applies to the following asset types:					
<div> <div> Article Article (Flex) Attribute Editor CSElement Collection Content Attribute Content Definition Content Parent Content Parent Definition Drill Hierarchy </div> <div> Add Remove </div> <div></div> </div>					
<div> Cancel Save Continue </div>					

7. In the **Options** section of the “New Recommendation” form, do the following:
 - a. Set the options appropriately for the recommendation’s intended purpose.
 - b. Click **Selection** at the top of the form (Related Items recommendations have no “Build” step).

If you click **Continue**, the following message appears:

Name	Type	Build	Selection	Sort
Recommendation Type "Related Items" does not have a Build step. Related items are defined on asset forms.				

In such a case, click **Continue** again to go to the **Selection** section of the form. Content Server displays the **Selection** section of the “New Recommendation” form:

Name	Type	Build	Selection	Sort
Selection Criteria:				
<input type="radio"/> Random (weighted by rating) <input checked="" type="radio"/> Highest Rating				

8. In the **Selection** section of the “New Recommendation” form, do the following:
 - a. Choose the selection criterion for the recommendation. For more information, see the section “[Selection Criteria](#),” on page 244.

b. Click **Continue**.

Content Server displays the **Sort** section of the “New Recommendation” form:

New Recommendation

▸ Name ▸ Type ▸ Build ▸ Selection **Sort**

New Sort Criteria:

Attribute Type	Attribute	Direction
<Pick Type>	<Pick Attribute>	<input checked="" type="radio"/> Ascending
		<input type="radio"/> Descending

Add Sort Criteria

Sort Criteria:

Cancel Save

9. In the **Sort** section of the “New Recommendation” form, do the following:

- a. In the “Attribute Type” drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

For more information, see the section “[Sort Criteria](#),” on page 245.

- b. In the “Attribute” drop-down list, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in [step a](#), the Attribute field will contain the options, **_ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

- c. In the **Direction** field, choose whether the sort direction should be ascending or descending.
- d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.
- e. (Optional) To add more sort criteria, repeat [steps a – d](#). Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.
- f. When you have selected the desired sort criteria, click **Save**.

Content Server displays the recommendation’s “Inspect” form.

This recommendation now appears in the Related Items section of the “New” and “Edit” forms for flex assets and flex parent assets. You can now configure relationships for flex assets.

For more information, see “[Configuring Asset Relationships Using Related Items Recommendations](#),” on page 270.

Editing Recommendation Assets

To edit a “Recommendation” asset

1. If Content Server’s interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. Find the “Recommendation” asset you want to edit and open its “Edit” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, select the asset type of the asset(s) you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.
 - d. In the search results list, navigate to the desired asset and click its “Edit” (pencil) icon.

For more information on searching, see the section “[Finding Assets](#),” on page 69.

Content Server displays the recommendation’s “Edit” form.

Recommendation: Static List

Cancel Save Changes

***Name:** Static List

Description:

Subtype: (no subtype)

Template: FeatureFund

Mode: ☐ List ☒ Recommendation

Options: Change

Brings back children of returned assets.

Promotions can override this recommendation.

This recommendation applies to all asset types.

Type: Static Lists Change

Static Lists: Change

Segment: Bffrequentvisitors

Item Name	In Segment Confidence	Out of Segment Confidence
AMD-A580-2001Mar9 (Article)	100%	65%
ASP-A56-2001Mar9 (Article)	100%	60%

Segment: highriskinvestors

Item Name	In Segment Confidence	Out of Segment Confidence
100-A637-2001Mar9 (Article)	100%	50%

If No Segments Apply:

Item Name	Confidence
ASP-A56-2001Mar9 (Article)	100%

Selection Criteria: Highest Rating Change

Sort Criteria: Change

Attribute Type	Attribute	Direction
1. Special	_CONFIDENCE_	Descending

Created: 2006-06-28 16:52:35 by fwadmin

Modified: 2006-07-25 10:40:28 by fwadmin

Cancel Save Changes Continue

4. Click the **Change** button next to the section you want to edit. For example, to edit the sort criteria, click the corresponding button.

Content Server displays the corresponding section of the recommendation's "Edit" form with the current configuration options preselected:

Recommendation: Static List

▶ Name ▶ Type ▶ Options ▶ Build ▶ Selection **Sort**

New Sort Criteria:

Attribute Type	Attribute	Direction
<Pick Type>	<Pick Attribute>	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending

Sort Criteria:

	Attribute Type	Attribute	Direction
1.	Special	_CONFIDENCE_	Descending
2.	PAttributes	FundFamily	Ascending
3.	PAttributes	Description	Ascending

5. Make your edits and click **Save Changes** to complete the operation. Content Server redisplay the asset's "Inspect" form.

Configuring Assets to Be Recommended

The next step is to configure the segment ratings and asset relationships for the assets that you want to promote using recommendations. Specifically, you need to use the flex asset and flex parent asset forms in Content Server's interface to do the following:

- Rate how important the assets and parent assets are to the members of each segment.
- Configure the asset relationships that are represented by the Related Items recommendations.

Note

Typically, business users configure assets to be recommended.

Assigning Ratings to an Asset

You can assign ratings to individual flex assets or to flex parents. FatWire recommends using asset parents to assign ratings, for the following reasons:

- It is much easier to manage the ratings for multiple assets if those assets reside in groups. In fact, it is often a good idea to create flex parents whose sole purpose is to assign ratings to child assets. You can make all of the assets that have identical rating conditions children of the same parent. Then, you can modify the ratings for all the child assets by making a single change.
- It is easier to compare the ratings for one group of assets to the ratings of another group than it is to compare the ratings of individual assets.
- Ratings are calculated more quickly because there are fewer assets with individual ratings; this speeds up system performance.

You should avoid using ratings to try to promote a specific flex asset in a specific circumstance. Instead, you should recommend specific assets, using either a Static Lists recommendation or a promotion to accomplish your goal.

Before you begin, be sure to complete the following tasks:

- Examine the segments to understand how they are defined and then determine which flex parents are significant for which segments.
- Ask your site developers whether they changed the system default rating for unrated assets. If they did not override the system default rating, that default rating is 50. This rating represents the average or middle point in your rating scale. Make a note of this value and keep it in mind while you rate assets. For example, rating an asset at lower than the system default rating means that it is unlikely that it would ever be recommended to a site visitor.

To assign ratings to an asset

1. If Content Server's interface is not open, log in.
2. If prompted, select the site you want to work with.
3. Find the flex asset or flex parent you want to assign ratings to and open its "Edit" form:
 - a. In the button bar, click **Search**.
 - b. In the "Search" form, select the asset type of the asset you want to find.

- c. Enter the desired search criteria (if any) and click **Search**.
- d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.
For more information on searching, see the section “[Finding Assets](#),” on page 69.
Content Server displays the asset’s “Edit” form.
4. In the asset’s “Edit” form, scroll to the **Ratings** section. This section of the form lists all the segments that have been created for this site. For example:

Ratings:	Segment	In Segment	Out of Segment
	AffluentYoungSingles	<input type="text"/>	<input type="text"/>
	Classic Movie Fan	<input type="text"/>	<input type="text"/>
	no segment ratings apply	<input type="text"/>	

5. 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 is be used when no segments are defined or the asset is assigned to a recommendation that does not recognize segments (List mode Static Lists recommendation).

For more information about ratings, see “[Ratings](#),” on page 241.

6. Click **Save Changes**.

The segment ratings are now assigned to the asset.

Configuring Asset Relationships Using Related Items Recommendations

Before you begin, be sure to complete the following tasks:


- Ask the developers to describe each of the Related Items recommendations so that you are familiar with the relationships the Related Items recommendations represent.
- Find out whether the recommendation is programmed to display a combination of flex assets, for example, “Product” and “Content” assets, so that you can configure the relationships correctly.

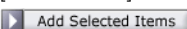
To configure relationships between assets

1. If Content Server’s interface is not open, log in.
2. If prompted, select the site you want to work with.
3. Find the flex parent that has the Related Items relationship(s) that you want to configure and open its “Edit” form:
 - a. In the button bar, click **Search**.
 - b. In the “Search” form, select the asset type of the asset(s) you want to find.
 - c. Enter the desired search criteria (if any) and click **Search**.

- d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.
(For more information on searching, see the section “[Finding Assets](#),” on page 69.)
Content Server displays the asset’s “Edit” form.
4. In the parent asset’s “Edit” form, scroll to the **Related Items** section, which will look similar to the image below:

Related Items:

Similar Funds (recommendation)
[no related items]
 (Select items from the appropriate tab in the tree; then click Add.)

Related Items (recommendation)
[no related items]




5. In the tree, select the tab containing the flex asset that you are setting up a relationship to.
6. In the tree tab, click to select the flex asset or flex parent. To select more than one asset, use **Ctrl-click** and **Shift-click**.
7. In the “Edit” form, under the name of the recommendation that defines this relationship, click the **Add Selected Items** button.



If the tree is toggled off, the **Add Selected Items** button becomes a right arrow, which, when clicked, opens a pop-up window where you can select items from your active list and history.

Engage lists the assets under the recommendation.

8. In the **Confidence** column next to an asset or asset parent, enter a confidence value that represents the weight of this relationship; confidence is expressed as a percentage ranging between 0 and 100. If you enter 0 or leave the field empty, the asset is excluded from this recommendation. For example:

Related Items:

Similar Funds (recommendation)
 Doculab Super Fund (Product) Confidence = %
 (Select items from the appropriate tab in the tree; then click Add.)

Related Items (recommendation)
 Doculab Article (Article) Confidence = %


For more information on confidence, see “[Confidence](#),” on page 243.

9. Repeat [step 8](#) for each asset in the list.
10. Repeat [steps 5 – 9](#) for each recommendation listed in the Related Items section of the asset’s “Edit” form.
11. Click **Save Changes**.

The asset relationships for the asset are now configured.

Verifying Recommendation Assets

To verify that you configured your “Recommendation” assets correctly, complete the following kinds of exercises:

- Create some test segments (see [Chapter 8](#), “[Grouping Visitors into Segments](#)” for information on creating segments).
- In the flex asset and flex parent asset forms (for example, “Product” and “Product Parent”), assign ratings for the segments.
- Browse your site as a visitor and register yourself so that you qualify for the test segment.
- Examine the items that the “Recommendation” assets return.
- If you find problems, ask your developers to write test pages that isolate the problem.

Publishing Rated Flex Assets

Since asset ratings and relationships take effect only after they are published, you must approve the assets whose ratings and relationships you configured so they can be published to your delivery system.

For more information about approving and publishing assets, see [Chapter 4](#), “[Publishing](#).”

Chapter 10

Creating Promotions

Promotions are merchandising assets that offer some type of value or discount to your site visitors based on the products the visitors are buying and the segments they qualify for.

This chapter describes how promotions work and how to create them. It contains the following sections:

- [About Promotions](#)
- [Creating Promotions](#)
- [Sample Promotion Asset](#)
- [Publishing Promotions](#)

About Promotions

Promotions offer some type of value to your site visitors and customers based on the segments the visitors belong to and products that they buy or view. This value can be offered in several ways:

- A discount off the purchase price of the promoted products.
- A discount off the entire value of the shopping cart.
- A discount off shipping charges.
- A combination discount: a shipping discount with a price or cart discount.

You (the marketers) define your promotions by using the following criteria:

- The segment members who qualify for the promotion. Promotions can be offered to everyone or to visitors in selected segments.
- The products to promote.
- The value the customers receive when they purchase the promoted product.
- The duration of the promotion.
- The text or graphics (or both) that appear on the rendered site page that notifies visitors of the promotion.
- The location of the notification. Promotions are displayed on the live (public) site pages by replacing the recommendation that would normally appear there.

About Promotions and Recommendations

“Recommendation” assets are the delivery mechanism for all promotional content. When you create a promotion asset, you determine where you want the promotion to be displayed by selecting a “Recommendation” asset. The promotion replaces, or overrides, the recommendation and uses the template assigned to that recommendation to render the promotion in place of the recommendation that would normally be displayed.

Consequently, when Engage calculates the recommendation that a template asks for, it automatically checks whether there are any promotions that should override the recommendation. If so, it passes the promotion back to the recommendation’s template and the template displays the promotion instead.

When Promotions Overlap

More than one promotion can use the same recommendation. What happens, then, when a visitor qualifies for more than one promotion and those promotions are using the same recommendation? It is easiest to explain with an example:

Example: Overlapping Promotions

There are two promotions running and both override the same recommendation:

Name:	End-of-Summer Sale
Discount:	10% off the entire contents of the visitor’s shopping cart
Segments it applies to:	All segments

Name: Printer Sale
Discount: 30% off all printers
Segments it applies to: 1) Home Office Worker
 2) Back to School

Note

Promotions do not have segment ratings. Either the promotion applies to the segment or it doesn't.

Question: How does Engage decide which promotion to display if the visitor is from either the Home Office Worker segment or the Back to School segment? And which discount is applied?

Answer: Engage randomly selects which promotion to display (each has a 50/50 chance) but it applies both discounts. However, applying both discounts does not mean that printers are discounted twice.

Examine the contents of this shopping cart:

Item in Cart

box of paper
 printer
 toner cartridge

Before Engage applies the discounts, it lists and compares the promotions for all the items in the cart:

Item in Cart	Summer Sale	Printer Sale
box of paper	10%	
printer	10%	30%
toner cartridge	10%	

Engage then applies the largest discount to each item. Therefore, on the final bill, the box of paper and the toner cartridge are 10% off and the printer is 30% off (not 40%).

Question: Only one of the promotions was displayed: how do the shoppers understand the total on the invoices?

Answer: If you (the marketers) created the promotions correctly, you entered a meaningful description of the discount in the Engage discount forms. Those descriptions are printed on the invoice next to the discounted items.

Creating Promotions

To create a promotion

Before you create your promotions, be sure that you complete the following tasks:

- Ask your site developers for a list of all the recommendations in your system and a description of where each one is programmed to appear.
- If you are creating promotions that apply to specific segments, you and the other marketers must create the segments.

Step 1: Name and Define the Promotion

Note

You can click **Save** as you progress through the sections of the “New Promotion” form in this procedure to save the changes you have made up to and in that section.

1. If Content Server’s interface is not open, log in.
2. If prompted, select the site you want to work with.
3. In the button bar, click **New**. Content Server displays a list of assets can create.
4. In the “New Asset” form, click **New Promotion**.

Note

If **New Promotion** is not on the list, stop here. You do not have the permissions to create promotions. If you have questions about your permissions, contact your CS administrator.

Content Server displays the “New Promotion” form. Notice the names of the form’s sections near the top. When you create a new “Promotion” asset, the **Name** section of the form is displayed:

New Promotion

[Name](#) ▶ [Goals](#) ▶ [Segments](#) ▶ [Discount](#) ▶ [Duration](#) ▶ [Display](#)

Name & Description

*Name:

Description:

Note

When creating or editing a “Promotion” asset, you can switch between the sections of the “New” or “Edit” form by clicking the name of the section you want to switch to.

5. In the **Name** section of the “New Promotion” form, do the following:

- a. Click in the **Name** field and enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
- b. Click in the **Description** field and enter a brief description of the promotion. You can enter up to 128 alphanumeric characters.
- c. Click **Continue**.

Content Server displays the **Goals** section of the “New Promotion” form.

Even though you can skip to any section of the “New Promotion” form, be sure that you create your first promotions in the sequence that takes place when you use the **Continue** button. Remember that the information you enter on any form is not saved to the database until you click **Save**.

Step 2: Define the Goals for the Promotion

New Promotion: Winter Special

▶ Name **Goals** ▶ Segments ▶ Discount ▶ Duration ▶ Display

Goals

Optionally, enter in your goals for this promotion. This information will be included in the Promotion Summary.

1.

2.

3.

A statement of goals is useful if your work is to be reviewed by others. Additionally, you might want to document why you designed the promotion a certain way after the promotion is complete.

In the **Goals** section of the “New Promotion” form, do the following:

1. Click in the first **Goal** field and describe a goal.
2. Enter goals in the second and third **Goal** fields, as needed.
3. Click **Continue**.

The “Segment” form appears, as shown in the next step.

Step 3: Define Which Visitors Are Eligible for the Promotion

New Promotion: Winter Special

► Name ► Goals **Segments** ► Discount ► Duration ► Display

Segments

☒ Apply to all visitors

☐ Apply to the selected segments:

Segment Name	Description
<input type="checkbox"/> Comedy Movie Segment	Customers who buy at least 2 comedy movies in 12 months
<input type="checkbox"/> Indie Movie Segment	Customers who buy at least 2 indie movies in 12 months
<input type="checkbox"/> Classic Movie Segment	Customers who buy at least 2 classic movies in 12 months
<input type="checkbox"/> Horror Movie Segment	Customers who buy at least 2 horror movies in 12 months

Use the **Segment** section of the “New Promotion” form to select the visitors who are eligible for the promotion. If you do not make any selections on this form, all visitors to the site are eligible for the promotion.

1. Do one of the following:
 - To offer the promotion to all visitors to the site, select **Apply to all visitors**.
 - To restrict the promotion to visitors from certain segments, select **Apply to selected segments** and select the segments to whom you want to offer the promotion.
2. (Optional) If you need to create a new segment for the promotion, complete the following steps:
 - a. Open a new browser window by clicking the arrow icon in the upper right corner of the form.
 - b. Create a new segment in the new window. For help with this step, see “[Creating Segments](#),” on page 222.
 - c. Click the **Refresh** icon in the parent window (the window in which you are creating the promotion).
 - d. Repeat the first step in this procedure to include this segment in the promotion.
3. Click **Continue**.

The **Discount** section of the “New Promotion” form appears, as shown in the next step.

Step 4: Define the Discount

Promotion: Winter Special

► Name ► Goals ► Segments **Discount** ► Duration ► Display

Discount Value

Purchases:

☒ No Discount

☐ percent off the promoted products

☐ Every product in the catalog

☐ Specific item(s) from the tree. (Select items from the appropriate tab in the tree; then click Add.):

Describe purchase discount for display on invoices or receipts:

Shipping Fees:

percent off shipping fees

Describe shipping fee discount for display on invoices or receipts:

Store ID is

Note

To configure the discount to be based on the current state of a visitor's shopping cart, create a segment based on the shopping cart. Then, select that segment for the promotion. For information about creating segments based on the shopping cart, see [“Step 4: Define the Segment with Shopping Cart Criteria,” on page 234.](#)

To define the discount use the following options:

- [Option 1: Discounting the Entire Shopping Cart](#)
- [Option 2: Discounting Specific Products](#)
- [Option 3: Discounting the Shipping Costs](#)

You can combine either of the first two options with the third option, but you cannot combine the first two options.

Option 1: Discounting the Entire Shopping Cart

In the **Discount** section of the “New Promotion” form, do the following:

1. Select the second option under **Purchases** and then set the values that define the discount.

For example, to offer \$5.00 off, set the values as follows:

Purchases:

☐ No Discount

☒ dollars off the promoted products

To offer 10% off, set the values as follows:

Purchases:

☐ No Discount

☒ percent off the promoted products

2. Select **Every product in the catalog**.
3. Click in the **Describe purchase discount** text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated. For example:

Describe purchase discount for display on invoices or receipts:

4. Either click **Continue** or go to [Option 3: Discounting the Shipping Costs](#).

Option 2: Discounting Specific Products

In the **Discount** section of the “New Promotion” form, do the following:

1. Select the second option under **Purchases** and then set the values that define the discount.

For example, to offer \$5.00 off, set the values as follows:

Purchases:
☐ No Discount
☒ off the promoted products

To offer 10% off, set the values as follows:

2. Select the products that the discount applies to:

Purchases:
☐ No Discount
☒ off the promoted products

- a. Select **Specific item(s) from the tree**.
- b. In the tree, select the tab appropriate to the flex asset you are applying a discount to. For the Burlington Financial sample site, it is the **Product** tab.
- c. Click to select the product or product category from the tree. To select more than one, use **Ctrl+click** and **Shift+click**.
- d. In the “Promotion” form, click **Add Selected Items**.

The flex assets or flex parents that you selected are listed on the form. For example:

☒ Specific item(s) from the tree. (Select items from the appropriate tab in the tree; then click Add.):

- ☐ Satire (ProductGroups)
- ☐ Pencil Nose (Products)

3. Click in the text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated.

For example:

Describe purchase discount for display on invoices or receipts:

4. Either click **Continue** or go to the procedure [Option 3: Discounting the Shipping Costs](#).

Option 3: Discounting the Shipping Costs

You can discount shipping in addition to, or instead of, discounting purchases. In the **Discount** section of the “New Promotion” form, do the following:

1. Under **Shipping Fees**, set the values that define the discount.

For example, to offer 15% off shipping set the values as follows:

Shipping Fees:
 off shipping fees

2. Click in the **Describe shipping fee discount** text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated. For example:

Describe shipping fee discount for display on invoices or receipts:

3. Click **Continue**.

The **Duration** section of the “New Promotion” form appears, as shown in the next step.

Step 5: Define the Promotion’s Duration

Promotion: Winter Special

Name	Goals	Segments	Discount	Duration	Display
Duration Specify a start date: <input type="text" value="2006"/> <input type="text" value="Dec"/> <input type="text" value="01"/> at <input type="text" value="12"/> : <input type="text" value="00"/> <input type="text" value="AM"/> - <input type="text" value="05:00"/> Specify an end date: <input type="radio"/> Apply until deleted <input type="radio"/> Apply for <input type="text" value=""/> days <input checked="" type="radio"/> Apply until: <input type="text" value="2007"/> <input type="text" value="Feb"/> <input type="text" value="28"/> at <input type="text" value="11"/> : <input type="text" value="59"/> <input type="text" value="PM"/> - <input type="text" value="05:00"/> <div> <input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Continue"/> </div>					

Note

If you do not specify how long the promotion should run, the promotion runs until you delete it.

In the **Duration** section of the “New Promotion” form, do the following:

1. Under **Duration**, set a start date and start time.

2. Specify when the promotion will end. Do one of the following:
 - If you want the promotion to run until you delete it or change its duration, select **Apply until deleted**. Use this option if you are designing an ongoing promotion with an indefinite duration. When you want to cancel it, you can either delete it or you can edit it and apply an end duration date.
 - If you want the promotion to run for a certain period of time after the start time that you specified in [step 1](#), click **Apply for**. Enter a whole number (not a fraction or decimal) in the text box and choose hours, days, weeks, months, or years from the drop-down field.
 - If you want the promotion to run until a specific date, select **Apply until** and enter the date and time that you want it to end. The current date and time are displayed by default.
3. Click **Continue**.

The **Display** section of the “New Promotion” form appears, as shown in the next step.

Step 6: Advertise the Promotion on Your Site

New Promotion: Winter Special

[Name](#) [Goals](#) [Segments](#) [Discount](#) [Duration](#) **Display**

Site Display

Use the following text or other media to display the promotion. (Select items from the appropriate tab in the tree; then click Add.):






In the **Display** section of the “New Promotion” form, do the following:

1. In the tree, select the tab appropriate to the asset that you want to use to advertise the promotion.
2. Click to select the name of the asset that you want to use to advertise this promotion. (Typically a promotional banner is stored as either an article or an image.)

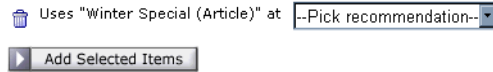
Note

You can select multiple assets by **Ctrl-clicking** each asset you want to select; you can also select a range of assets by **Shift-clicking** the first and last assets in the range.

If you select multiple assets, when the promotion is displayed on your site pages, Engage displays the content that was rated the highest for the segments that the visitor belongs to. In other words, if you are using this promotion for more than one segment, you can use segment-specific ad banners for the promotion.

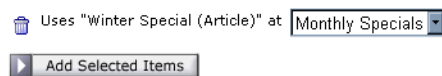
3. Click **Add Selected Items**.

The items appear on a list in the form with a drop-down list box of recommendations next to each name. For example:



4. In the **Pick recommendation** field next to the first item, select the name of the recommendation that you want to replace or override with this item. (The recommendation provides the location for the text you selected in [step 3](#).)

For example:



5. Repeat [step 4](#) for each item that you selected in [step 3](#).
6. Click **Save**.

The “Inspect” form appears, displaying a summary list of information about the promotion.

Sample Promotion Asset

When you install Engage with the Burlington Financial sample site, you get a sample promotion asset, **High Risk Discount**, that appears on the **Marketing** tab in the tree. This promotion is designed to work in concert with the sample “Segment” and “Recommendation” assets that also appear on the **Marketing** tab. Use the sample promotion as a template for creating promotion assets for your site.

Publishing Promotions

After you create a promotion, it must be approved before it can be published to your delivery system. The promotion takes effect only after it is published. Be sure to examine or inspect your promotion to verify that you configured it correctly before you approve it for publishing.

For more information about approving assets, see [Chapter 4](#), “[Publishing](#).”

Appendices

This part contains the following appendices:

- [Appendix A, “The Flex Asset Model”](#)
- [Appendix B, “When There Is No Tree”](#)

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 sections:

- [Overview of the Flex Asset Model](#)
- [Flex Asset Functionality](#)

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.

Flex Asset Functionality

In many of your daily activities as a content provider, the distinction between basic asset types and flex asset types is not relevant, because the majority of the functions you perform are the same whether you are working with flex or basic assets. However, in some of your activities, you may encounter functionality that is unique to flex assets.

Note

Your access to such functionality depends on your role and the permissions set by your CS administrator.

When Working with Engage

You can use Engage with both basic assets and flex assets. However, more Engage functionality is available when used with flex assets.

- Only flex assets and flex parents can be rated for segments. Basic assets cannot be rated for segments. See [“Ratings,” on page 241](#) for more information on rating assets.
- You can create a Related Items recommendation only with flex assets. See [“Related Items,” on page 247](#) and [“Configuring Asset Relationships Using Related Items Recommendations,” on page 270](#) for information on related items recommendations.

- When configuring sort order for a “Recommendation” asset, flex attributes only (not basic attributes) are available as a sorting option. See [“Sort Criteria,” on page 245](#) for more information.

When Searching for Assets

- Searching for specific attributes is available only for flex assets. See [“Running an Advanced Search on Flex Assets,” on page 73](#) for more information.

When Creating New Assets

- When creating a new flex asset, you may see a field (in the content entry form) that prompts you to select a parent or multiple parents for the new asset.
 - Depending on how your developers configured the asset type, this field could be required or optional.
 - You will either see **(S)** or **(M)** next to the parent selection field. **(S)** indicates that you can only select one parent; if this field is required, you must select one parent before saving the new asset. **(M)** indicates that you can select more than one parent; if this field is required, you must select at least one parent before saving the new asset.
 - Depending on the design implemented by your developers, you will either use select boxes or you will select from the tree to choose parents.
- If you have the appropriate permissions, you may be responsible for creating new flex attributes. When naming flex attributes, note that flex attribute names cannot contain spaces.

Appendix B

When There Is No Tree

This appendix contains supplemental information that you will find helpful when working in Content Server's Advanced interface.

It contains the following section:

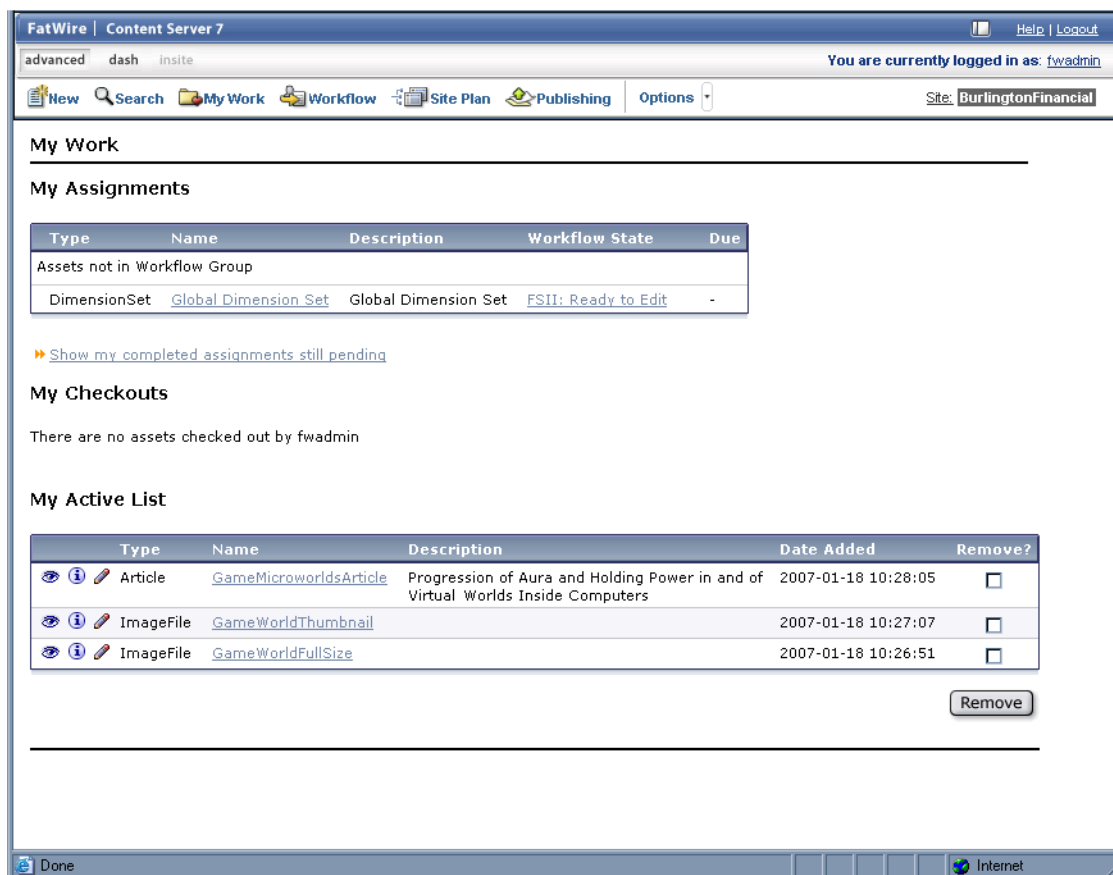
- [Working With Assets When There Is No Tree](#)

Working With Assets When There Is No Tree

The tree can be disabled by your administrator by denying you the permissions that allow the display of the tree. (For example, your organization's security policy might not allow the execution of Java applets on employee machines.) You can also toggle the tree off and back on yourself (unless it was disabled by the administrator):

1. If Content Server's interface is not already open, log in.
2. If prompted, select the site you want to work with.
3. In the top bar, click the **Toggle Tree** button.
4. The interface refreshes and displays the "My Work" view.

When the tree is off, Content Server's interface becomes all workspace (see "[Workspace](#)," on page 56), as shown below:



You can use the extra workspace freed by the tree to do the following:

- Display the site plan in the workspace by clicking **Site Plan** on the button bar (see "[Site Plan](#)," on page 49).
- Display the "My Work" view by clicking the **My Work** button (see "[My Work](#)," on page 48).
- View the contents of other asset-specific tabs by performing asset type searches (see "[Finding Assets](#)," on page 69).

The absence of the tree also has an impact on creating and editing assets. Many “New” and “Edit” asset forms support data selection from the tree; that is, when filling in the form, you can select values (assets) from the tree and click a button to add your selections to the asset definition.

For example, in the “New Article” form, you can add assets from a pre-associated asset type — in this case, the “Collection” asset type (the administrator creates these associations):

Associated Collection:

Related Stories



When the tree is on, you select “Collection” assets in the tree and click **Add Selected Items** to include them as “Article” asset associations.

When the tree is toggled off, the **Add Selected Items** button is replaced by an arrow button:

Associated Collection:

Related Stories

When you click the arrow button, a tabbed pop-up window appears:

Select asset for Related Stories

Asset Type: Collection

Search For:

Total Collections: 32

This window contains “Search,” “Active List,” “History,” and “My Assignments” tabs. Through this window you can search for an asset to associate with the new asset you are creating, or add an asset that’s already in your Active List, your History, or your “My Assignments” list.

Select asset for Related Stories

Asset Type: Collection

Search For:

Items 1 to 10 of 32 [Next 10](#) ▶

Type	Name
Collection	HomePage Stories
Collection	HomePage Columns
Collection	Columnist Top
Collection	CompaniesTop

Once you have located the document asset you want to use, click it to associate it with your new product asset. The popup window will automatically close.

The following asset management tasks support this dual selection capability:

- Making asset associations for basic assets
- Selecting parents for flex assets
- Selecting attribute values for attributes of type asset that use the **PickAsset** attribute editor
- Adding segment filtering criteria
- Setting up asset relationships for recommendations
- Selecting flex assets and flex parents for promotions

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