Content Server

Version: 7.0

Dashboard Interface User's Guide

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FatWire SOFTWARE

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Document Revision Date: Mar. 26, 2007
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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 Dashboard interface. Typically, content providers are specialists in fields such as corporate communications, finance, human resources, sales, and marketing. The content providers' expertise is rooted in the content, not in the software used to manage it. Technical proficiency is not required.

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

How This Guide Is Organized

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

Part 1: Introduction

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

Part 2: Working in the Dashboard Interface

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

Part 3: Appendices

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

Other Helpful Information

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

Figures and Diagrams

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

Typographic Conventions

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

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

Related Publications

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

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

`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

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. (Publishing functions are available in the Advanced interface.)

Content Server Systems

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

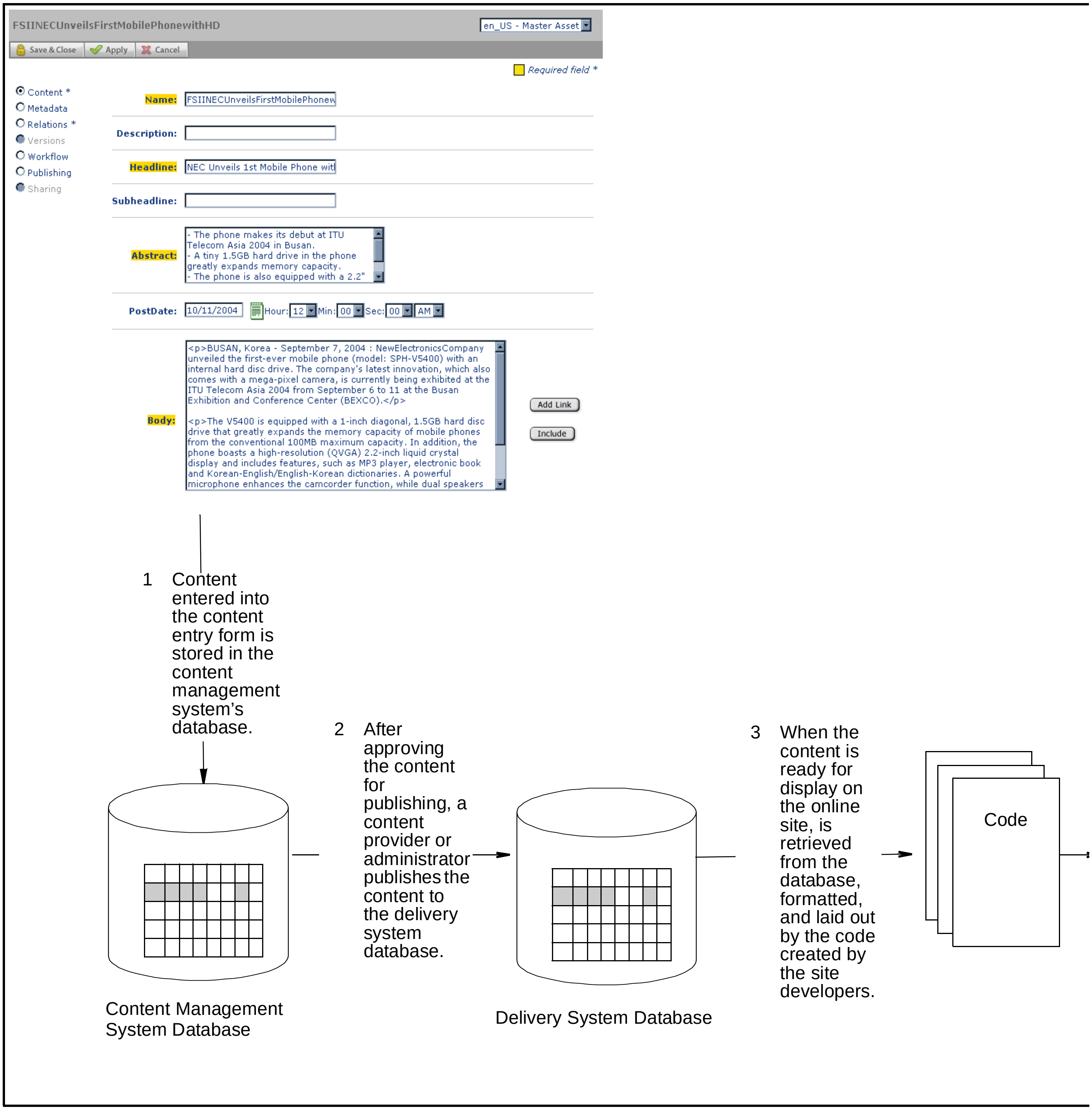
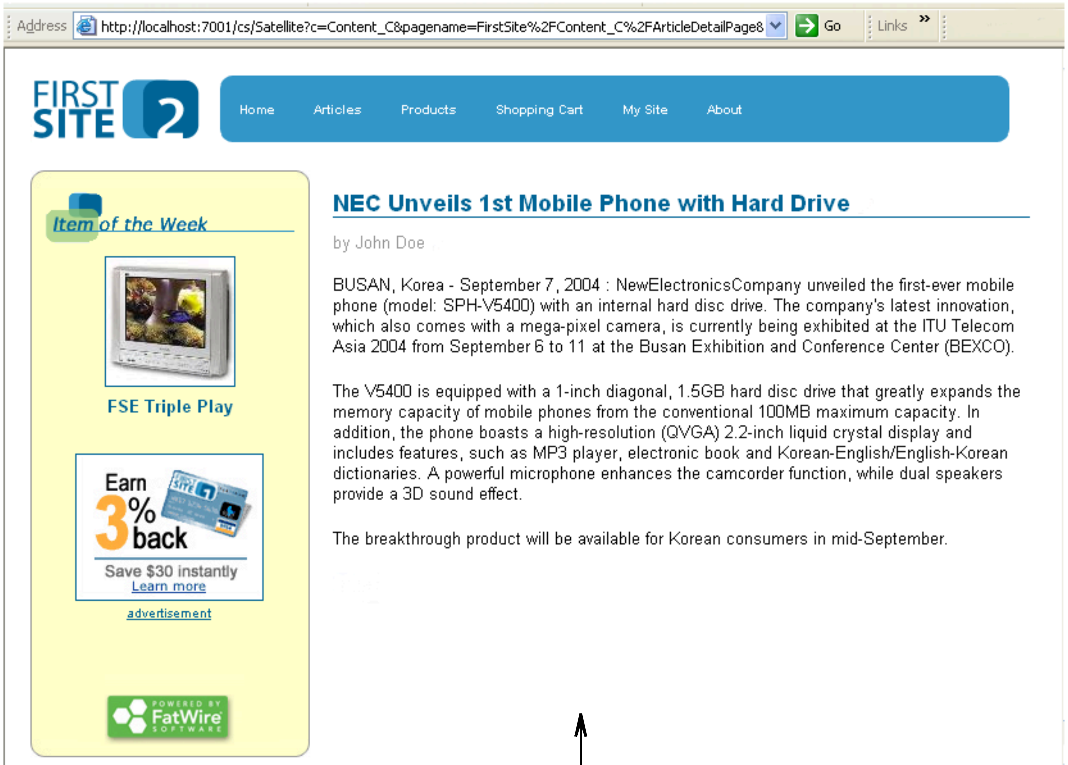


Figure 2: The online site



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.

Exploring Content Management Concepts

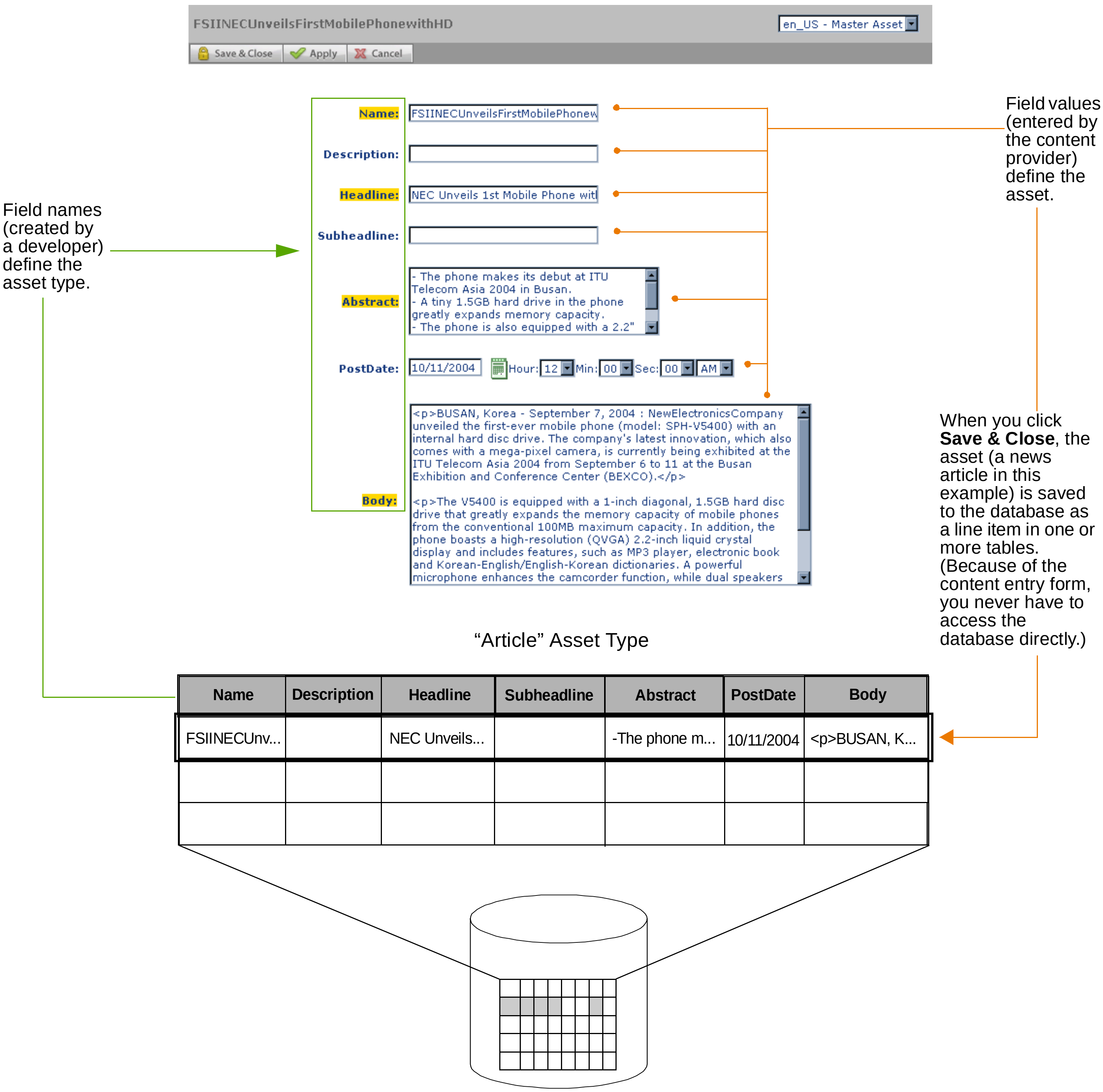
This section explains how Content Server defines and treats content. It explains terms such as “assets,” and “asset types,” which are used throughout this guide.

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 17 (The same content entry form is shown in Figure 3.)

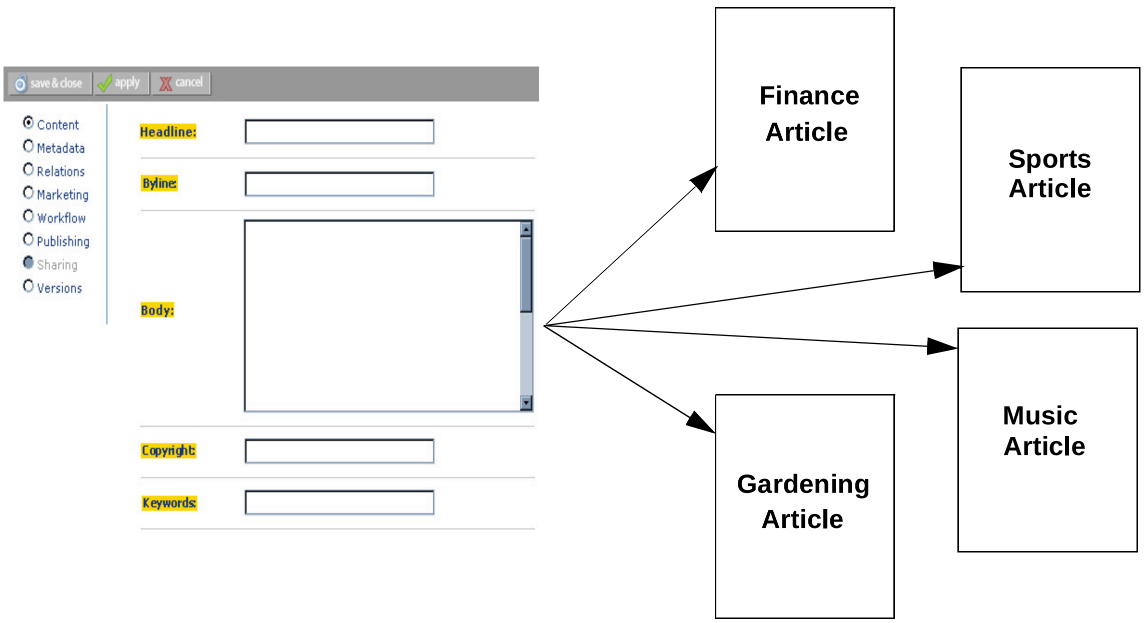
The content you are expected to provide is defined by the set of field names which make up the form and prompt you for the content. By populating the fields and saving your entries, you create an object called an “asset” in the CS database. That asset is content, which you can edit or delete, pass through 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

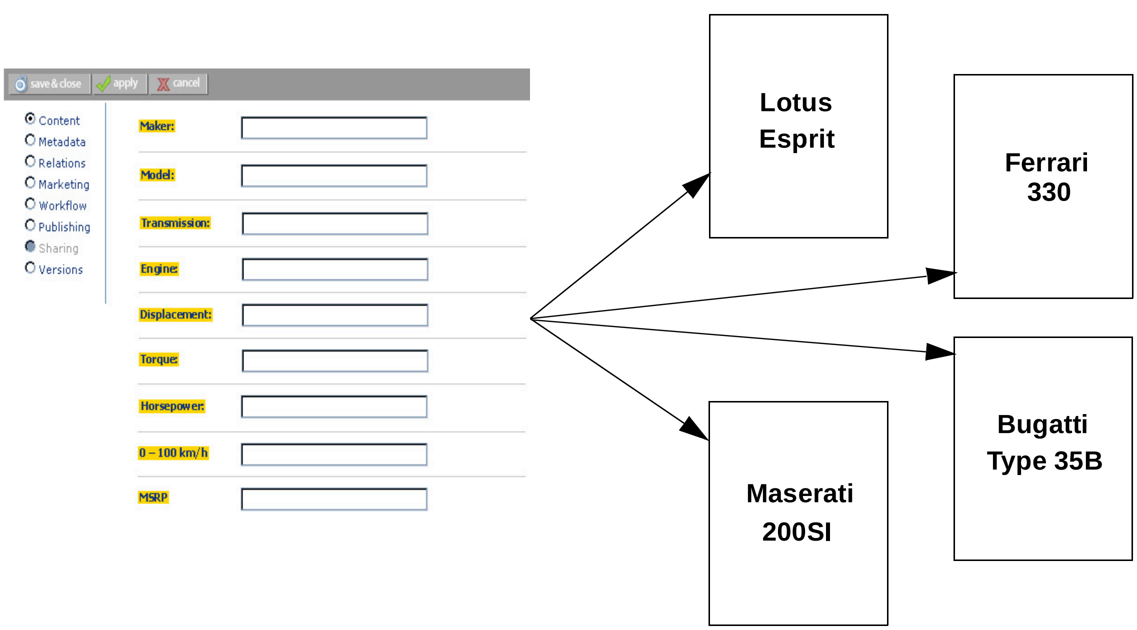


An asset type is reusable, allowing you to create many unique assets from a single content entry form. Each asset is an instance of its asset type.

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 phone technology. Other content providers created the Finance Article asset, the Gardening Article asset, the Sports Article asset, and the Music Article asset (shown below), all of which are instances of the “Article” asset type:.



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

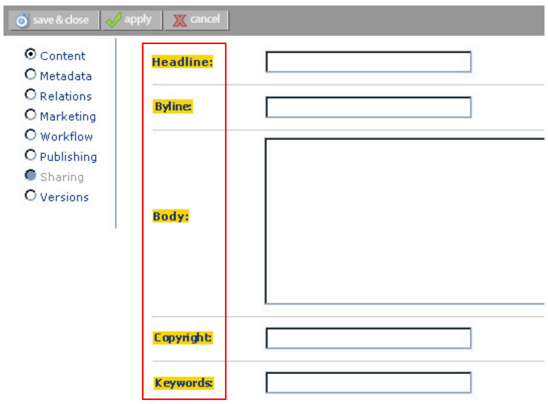
As a content provider, you are likely to manage two kinds of assets: **structured content** assets and **document** assets. The difference is that a structured content asset requires you to enter prescribed pieces of content directly into the Content Server interface, whereas a document asset requires 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.

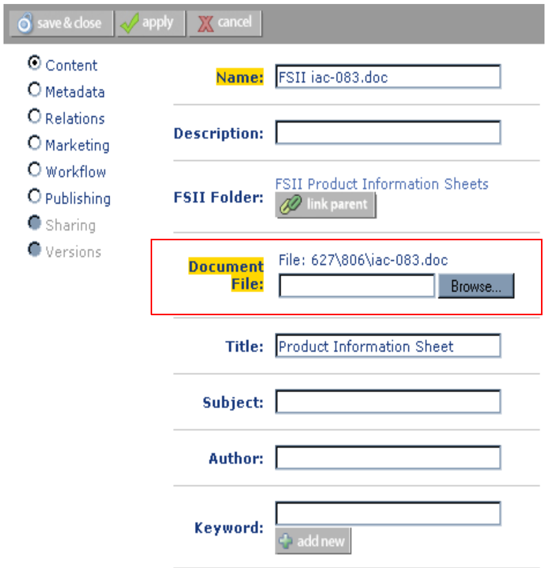
Structured Content Asset



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

Document Asset



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 with each other into a multilingual set. Members of multilingual sets can be managed, passed through workflow, approved, and published to one or more destinations just like their non-localized counterparts.

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

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

Design Assets

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

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

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

Content Server’s Data Models

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

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

Basic vs. Flex

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

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

Content Management Sites

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

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

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

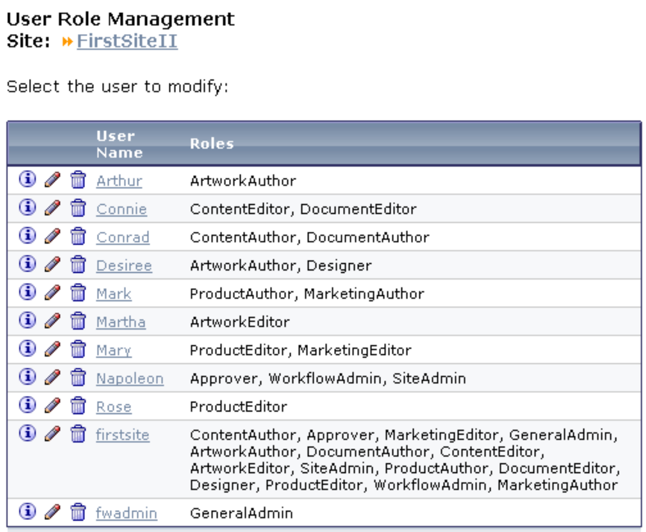
  Notice the hierarchical structure in which the content is organized.

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

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

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


User Role Management
Site: FirstSiteII

Select the user to modify:

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

This list is available only to administrators using the Advanced interface.

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 Dashboard Interface?

The Dashboard provides access to Content Server features listed in Table 1, on page 33. What you can do individually is determined by the role(s) granted to your user name by the administrator. If you do not have the right permissions, the function is unavailable to you — it is either grayed out, hidden from your interface, or it produces an error message when you attempt to use it.

Permissions to Assets

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

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

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

Selecting Page Content

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

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

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

Dependencies

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

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

- To keep and publish together assets 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.

Approving and Publishing Assets

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

Approving Assets

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

Note

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

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

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

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

For instructions on approving assets for publishing, see Chapter 8, “Approval for Publishing.” For an in-depth explanation of Content Server’s approval mechanisms, see the *Content Server Advanced Interface User’s Guide*.

Publishing Assets

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

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

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

Users, Roles, and Workflow Assignments

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

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

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

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

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

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

When you are done working with an asset, you indicate that you have finished your workflow assignment for that asset by using the **Finish My Assignment** function. Content Server then changes the asset's state and determines who gets the assignment next, according to the workflow process. For more information about workflow, see Chapter 9, "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 10, "Revision Tracking"):

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

Check In and Check Out

To work with an asset when revision tracking is enabled:

1. You check the asset out from the database.

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

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

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

Archive Options

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

Cancelling Checkout

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

Rollback with Revision History

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

Features in the Dashboard Interface

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

Table 1: Features comparison

Feature	Dashboard	Advanced
Administrative Controls		
Performing administrative tasks		✓
Asset Model		
Basic assets	✓	✓
Flex assets	✓	✓
Editorial Functions		
Create and copy assets	✓	✓
Edit assets	✓	✓
Delete assets	✓	✓
Finding Assets		
Perform simple searches	✓	✓
Perform advanced searches	Using Lucene's query syntax	Form-based
Sort search results	✓	✓
Save search criteria		✓
Save search results	✓	✓
Attribute value search	✓	Limited to pre-defined attributes
Visually browse a site's structure (site plan)	✓	✓
Visually browse flex family hierarchies	✓	✓
Organizing Assets		
Work with tags	✓	N/A
Work with the Active List	N/A	✓
Share assets across sites	✓	✓
WYSIWYG Editors		
Work with FCKEditor	✓	✓
Work with eWebEditPro	N/A	✓
Work with RealObjects	N/A	✓
Work with the DatePicker	✓	✓
Work with the ImagePicker	N/A	✓

Table 1: Features comparison *(continued)*

Feature	Dashboard	Advanced
InSite Interface		
Preview assets	✓	✓
Edit assets (“Editing” mode)	✓	✓
Add, replace, remove, and position assets on a page (“Page Layout” mode)	✓	✓
Finish workflow assignments	✓	✓
Search for assets	✓	✓
Asset Associations		
Associate assets with other assets	✓	✓
Assign templates to assets	✓	✓
Assign assets to pages		✓
Work with collections		✓
Place and unplace pages		✓
Embedded Links		
Embed links to other assets	WYSIWYG-enabled text fields only	Standard and WYSIWYG-enabled text fields
Embed contents of other assets by reference	WYSIWYG-enabled text fields only	Standard and WYSIWYG-enabled text fields
Embed links to external web sites	WYSIWYG-enabled text fields only	Standard and WYSIWYG-enabled text fields
Work with “Link” assets		✓
Multilingual Assets		
Assign locale designations to assets	✓	✓
Work with linked translations of content	✓	✓
Compare translations	✓	N/A
Workflow		
Pass assets through workflow	✓	✓
Work with workflow groups		✓
Work with workflow reports		✓

Table 1: Features comparison *(continued)*

Feature	Dashboard	Advanced
Engage		
Work with segments		✓
Rate assets for segments	✓	✓
Work with promotions		✓
Work with recommendations		✓
Publishing		
Approve assets for publishing	✓	✓
Remove assets from the publishing queue	✓	✓
Publish assets		✓
Monitor and manage publishing sessions		✓
Revision Tracking		
Track revisions to assets	✓	✓
Roll assets back to previous versions	✓	✓

Part 2

Working in the Dashboard Interface

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

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

- Chapter 2, "Getting Started"
- Chapter 3, "Creating and Editing Assets"
- Chapter 4, "Finding and Organizing Assets"
- Chapter 5, "Working with Multilingual Assets"
- Chapter 6, "Working with the InSite Interface
- Chapter 7, "Associations, Links, Sharing, and Ratings"
- Chapter 8, "Approval for Publishing"
- Chapter 9, "Workflow"
- Chapter 10, "Revision Tracking"

Chapter 2

Getting Started

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

It includes the following sections:

Logging In

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

> **Note**
>
> Make sure you are using a supported browser. Contact your CS administrator if you are not sure whether your browser is supported.

To log in to the Dashboard 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>
```

where:

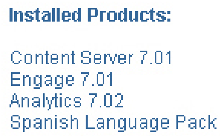
- `<server>` is the host name or IP address of the machine running Content Server.
- `<port>` is the number of the port on which Content Server is listening for connections.
- `<context>` refers to the application context root (URI) assigned to the Content Server application when it was installed.

> **Note**
>
> - If you have questions about the Content Server URL, your user name, or password, contact your administrator.
> - The exercises throughout this guide are based on the `firstsite` user (password `firstsite`) logged in to the FirstSite II sample site.

The login page appears. The page contains the login form:

> **Note**
>
> Your developers might have customized the login page to include links and other information specific to your organization. Consult your developers to find out more about such custom content.

Notice that the bottom left of the login page lists which FatWire products are installed:



2. Log in to the site you want to work with. Do the following:

   a. (Optional) If you have previously worked with Content Server in this browser on this machine, select the site you want to work with from the "Select Site" drop-down list.

      Note the following about this list:

      - The "Select Site" drop-down list shows the sites available to the user name you most recently used to log in to Content Server. The site you logged in to most recently is pre-selected in the list. The list is updated each time you log in.
      - If you are logging in for the first time, or you have recently cleared the browser's cookies, this list is unavailable (greyed out). If so, proceed to step b.
      - If you are logging in with credentials different from those you used during your last session, this list will be invalid. In such case, proceed to the next step; you will select the site you want to work with after you log in.
      - This list is stored in a browser cookie on your machine. If you use a different browser or machine from the one you normally use to log in to Content Server, the contents of this list will not be carried to the new browser or machine.

   b. Enter your user name and password into the appropriate fields.

   c. (Optional) If you want Content Server to save your user name so that you don't have to enter it the next time you log in, select **Remember my user name**.

      Your user name is stored in a browser cookie on your machine. If you clear your cookies, you will have to re-enter your user name the next time you log in.

   d. Click **Login**.

   e. (Optional) If the "Select Site" drop-down list in step a was unavailable, or you are logging in with credentials different from those you used during your last session, Content Server displays a list of sites you have permissions to work with:

You are currently logged in as 'firstsite'
Select a site that you want to work on:

Select	Name	Description	Roles
⦿	BurlingtonFinancial	Burlington Financial	ArtworkEditor, GeneralAdmin, Approver, ContentEditor, WorkflowAdmin, Analyst, Pricer, Marketer, SiteAdmin, Checker, MarketingAuthor, MarketingEditor, Author, Editor, ContentAuthor, Expert, ProductAuthor, ProductEditor, DocumentAuthor, Designer, DocumentEditor, 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

Select Site

      In such case, select the site you want to work with and click **Select Site**.

Note

- You can work with only one site at a time, but once logged in, you can switch between sites, provided that other sites to which you have access rights are available.
- When following exercises in this guide, select the FirstSite II sample site (if installed) whenever you are asked to log in.

The Dashboard interface loads.

Figure 4: The home view of Dashboard interface.

Search field

Enter your search criteria here.

Your user name

Top bar

Find assets.

Access the Advanced interface.

Log out.

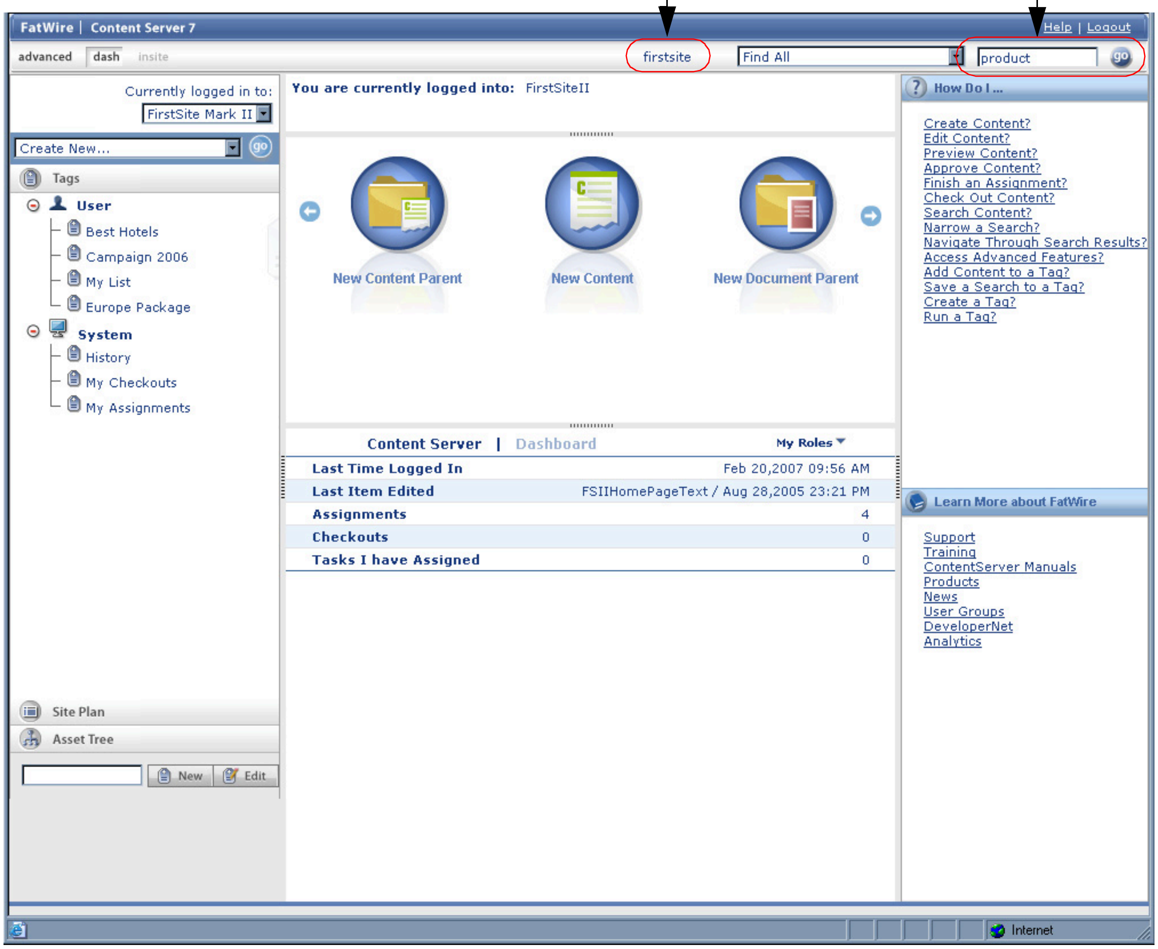
Navigation pane

Access assets via tags, site plan, or asset tree.

Manage tags.

Create new assets.

Switch sites.



Your workspace

Work with assets.

Navigate search results and other asset lists.

Quick Tour

The view shown in Figure 4 is your default view after logging in. If you perform an action, the view will change. For example, if you perform a search, the workspace displays the results of your search; if you create a new asset, the workspace displays the appropriate asset form, and so on. This section provides a quick tour of the Dashboard interface.

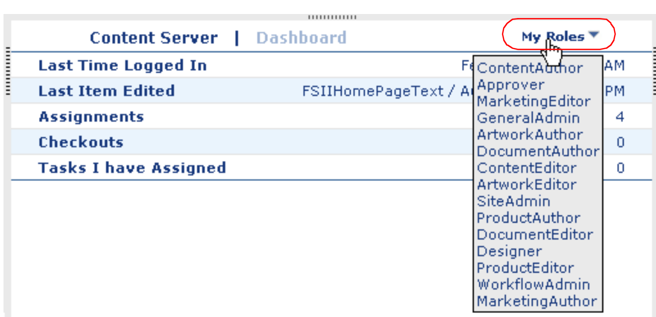
> **Note**
>
> The exercises in this section, and throughout this guide, are based on the `firstsite` user logged in to the FirstSite II sample site. The `firstsite` user has all the permissions that a content provider can be granted. In your installation, the appearance of your interface will be determined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

In this section, you will complete the following exercises:

- Determine your roles (step 1)
- Perform a search (step 2 on page 44)
- Open an asset (step 3 on page 45)
- Edit an asset (step 4 on page 46)
- Preview an asset (step 5 on page 47)
- Enter split view mode (step 6a on page 48)
- Create a tag (step 6b on page 49)
- Add an asset to a tag (step 6c on page 49)
- Run a tag (page 49)
- Log out (page 50)

Let's start the tour!

1. Determine your roles in the current site. Hover your cursor over **My Roles** in the Dashboard pane to show a list of roles:



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

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

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

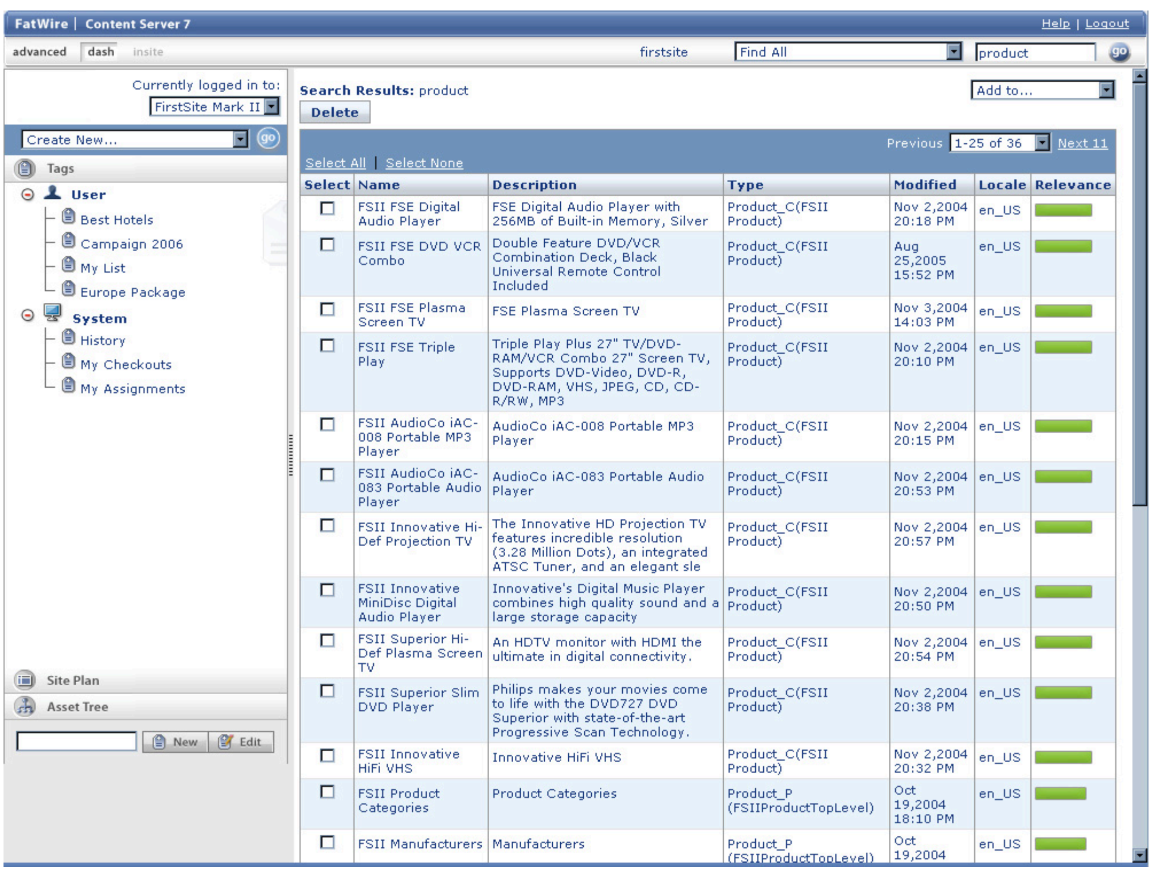
> **Note**
>
> Your administrator determines the exact permissions assigned to each role on your system. The roles and permissions described in this section are examples only.

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

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

   b. (Optional) If you want to limit your search to a specific asset type, select that asset type from the “Find All” drop-down list (**Find Product** in our example). If you want to search across all asset types, use the default, **Find All**.

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



Search results pane

The search results list shows a brief amount of information about each item on the list, such as name, asset type, and modification date. By default, the results are sorted by relevance (indicated by a green bar in the “Relevance” column), starting with the most relevant asset.

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

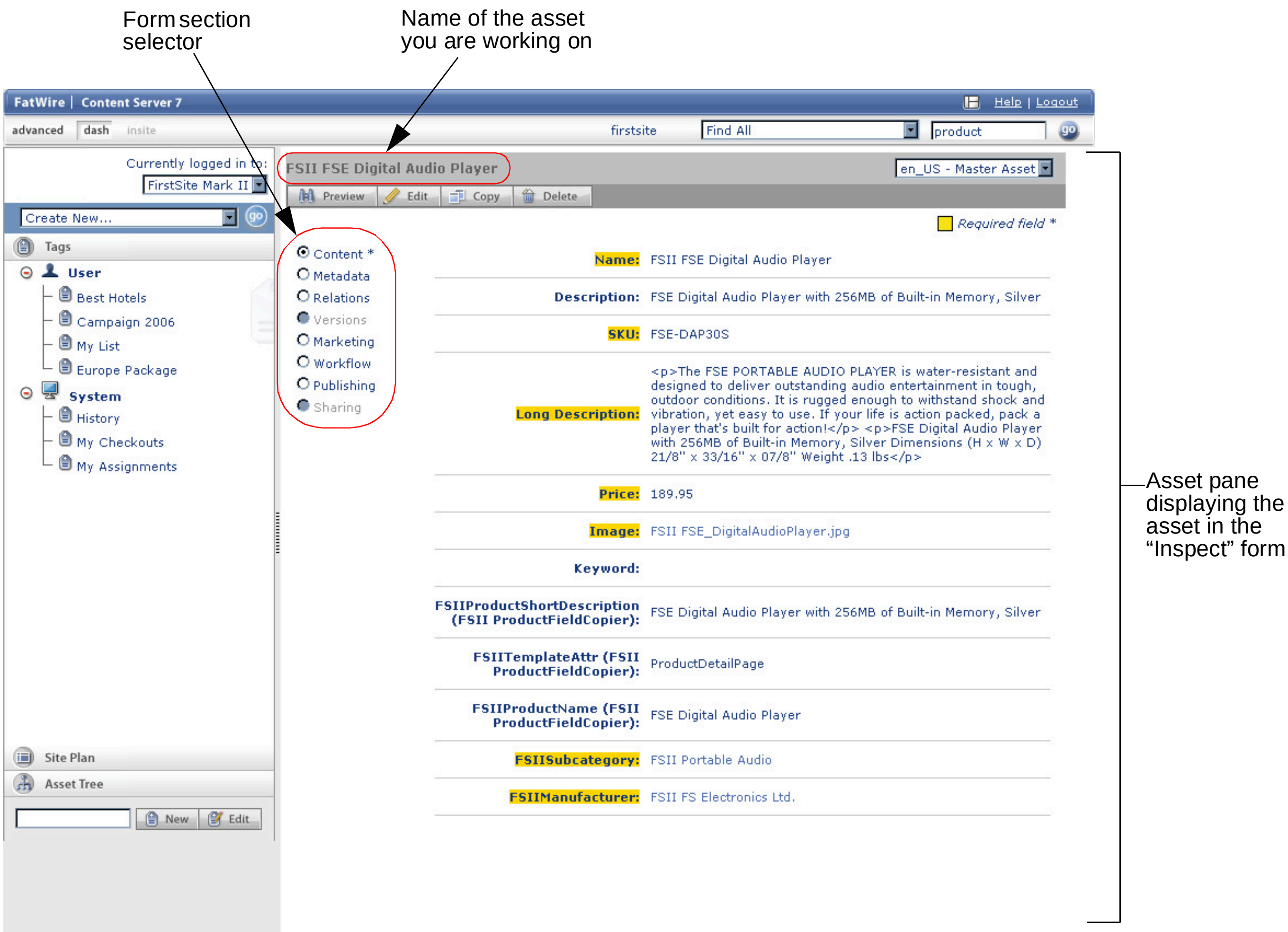
e. Click **Next** at the top right of the search results list to go to the next page of results; click **Previous** to go to the previous page.

To find out more about searching for assets, see “Finding Assets,” on page 82.

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

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

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



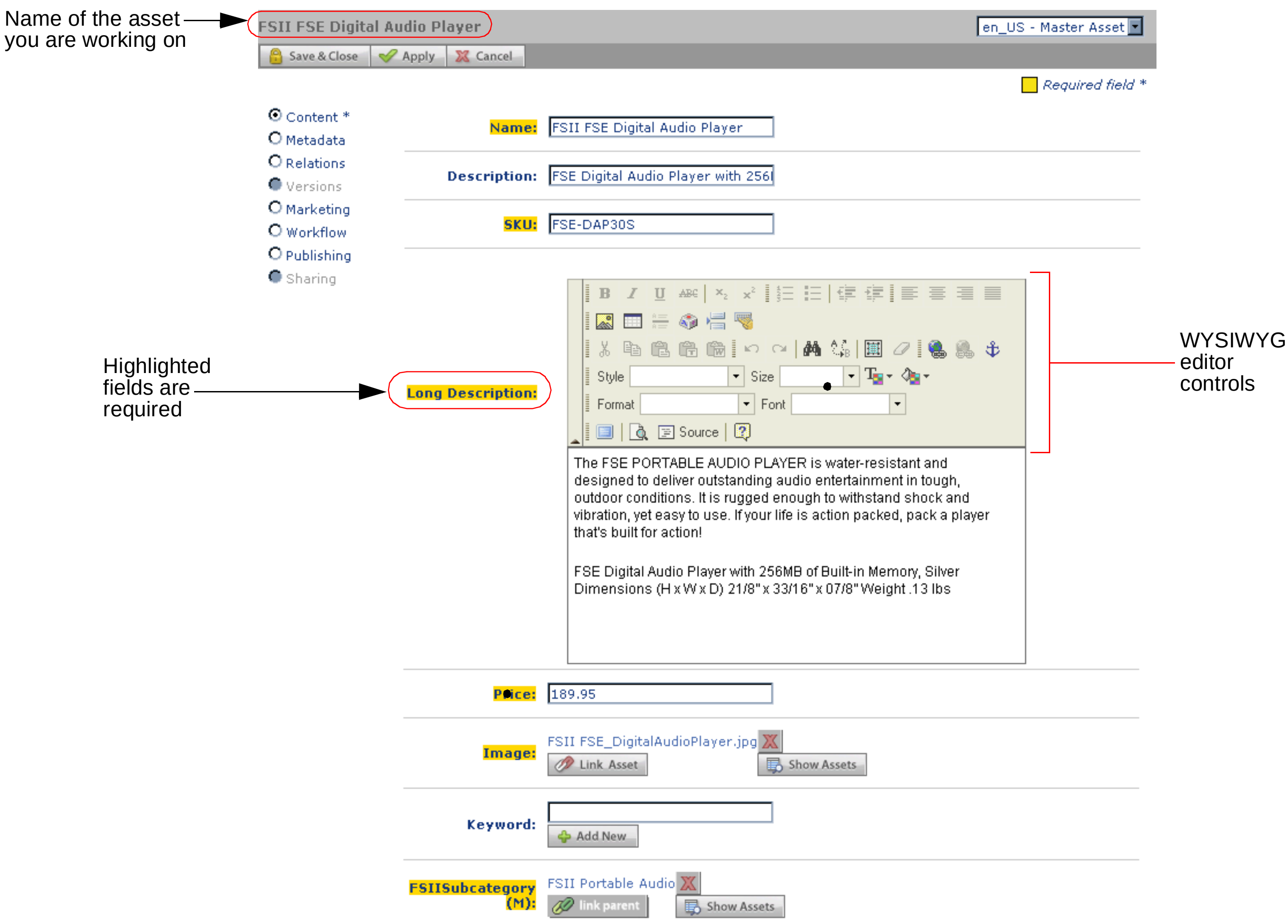
b. Inspect your asset, and any information relating to it, by selecting different sections of the form. When you are finished, return to the **Content** section.

For more information, see “Asset Pane,” on page 61.

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

   a. Click **Edit** at the top of the “Inspect” form.

      Content Server opens the asset in the “Edit” form.



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

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

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

Note

Depending on how your site is set up, one or more fields in your “Edit” forms might be WYSIWYG-enabled. A WYSIWYG-enabled field allows you to apply MS Word-style formatting to your content right in the “Edit” form. For more information, see “Working with FCKEditor,” on page 76.

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

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

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

e. Click **Save & Close**.

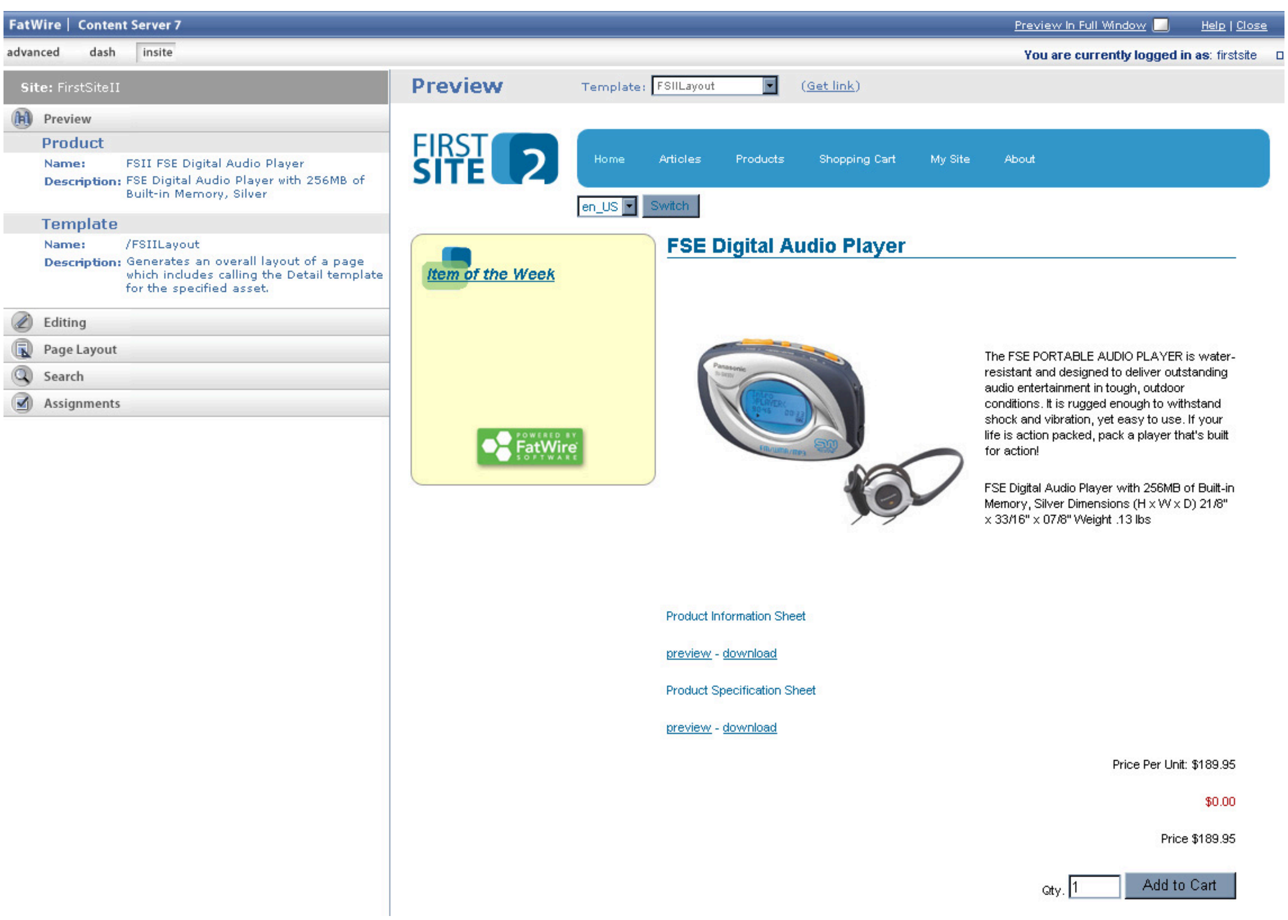
Content Server saves the changes you have made to the asset and redisplays the asset in the "Inspect" form, showing the changes you have made to the asset.

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

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

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

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



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

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

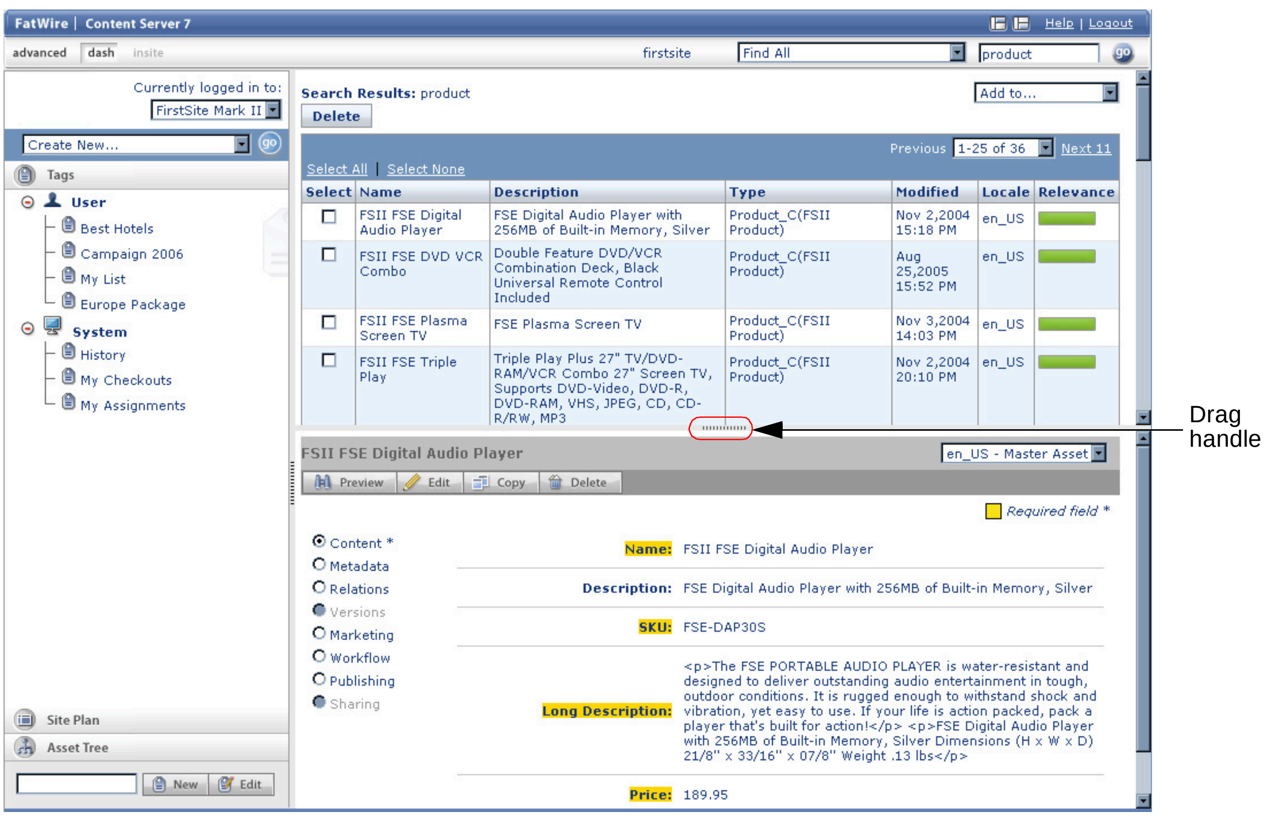
c. Close the preview window and return to the Dashboard interface.

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

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

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

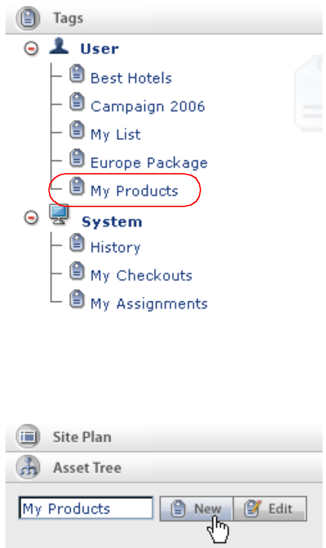
The workspace displays the search results pane (showing the results of the search you performed in step 2 on page 44) above the asset pane.



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

See "Workspace: Asset Management View," on page 59 for details on split mode.

b. In the **New Tag** field in the navigation pane, enter **My Products** and click **New**.

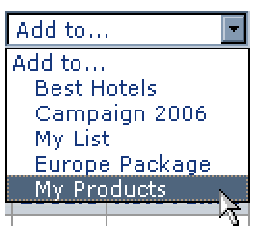


The new tag appears in the **Tags** tree.

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

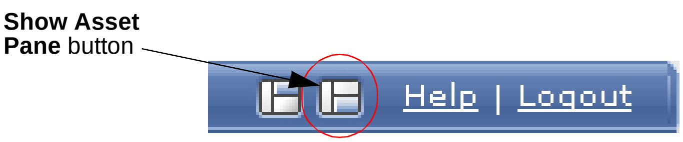
- **FSII FSE Digital Audio Player**
- **FSII FSE DVD VCR Combo**

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



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

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



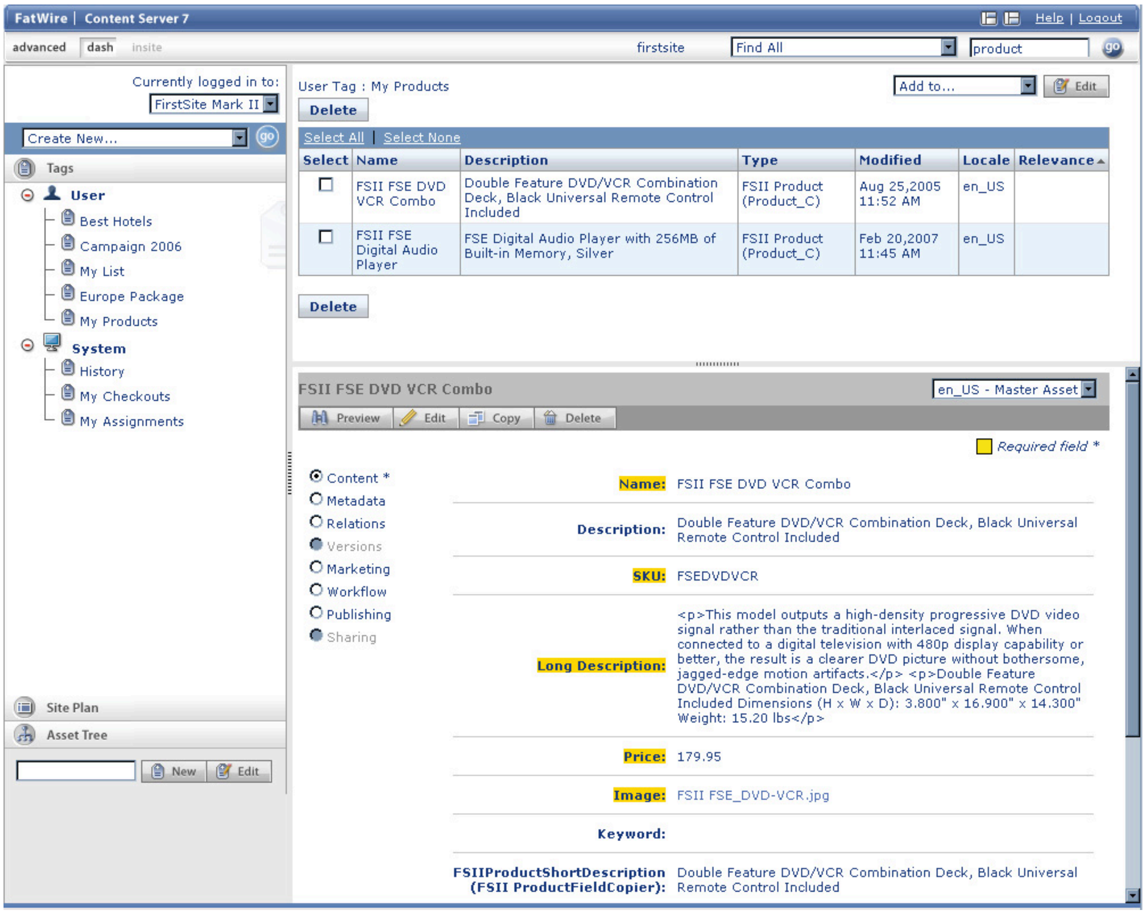
7. If you want to work with an asset assigned to a tag, run the tag and select the asset from the list of returned assets:

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

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

b. In the list of returned assets, click **FSII FSE DVD VCR Combo**.

The workspace switches to split mode and displays the asset pane underneath the search results pane. The asset pane shows the asset in the "Inspect" form.



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

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

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

Additional Ways of Accessing Assets

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

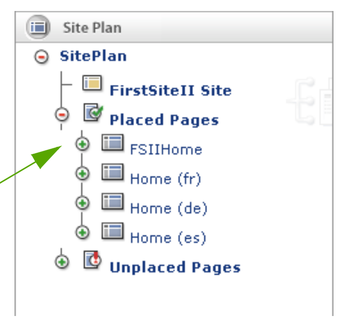
- Accessing Assets Using the Site Plan Tree
- Accessing Assets Using the Asset Tree

Accessing Assets Using the Site Plan Tree

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

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

To access assets using the site plan tree

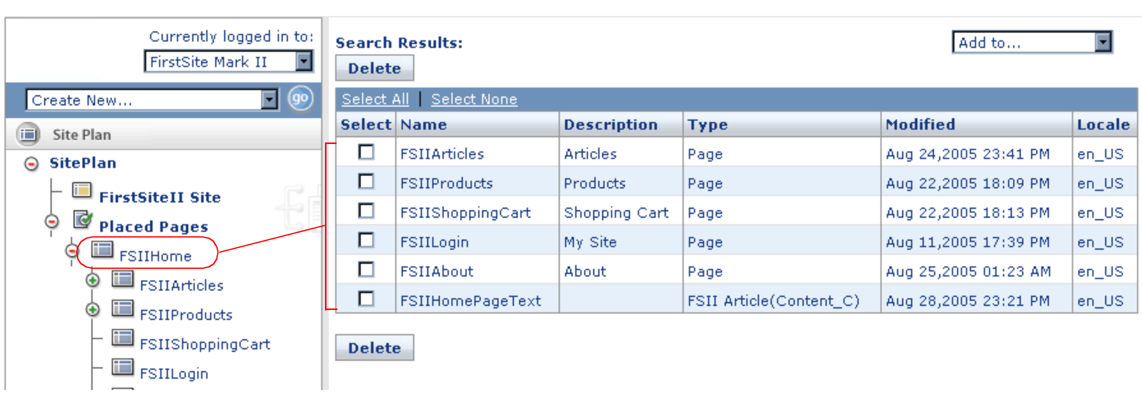


1. Log in to the site you want to work with.
2. In the navigation pane, click the **Site Plan** bar.

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

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

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



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

   b. **Open the desired asset**. In the list of assets displayed in the workspace, click the asset you want to work with. (You can also click the asset directly in the tree.) Content Server opens the asset in the “Inspect” form.

Accessing Assets Using the Asset Tree

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

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

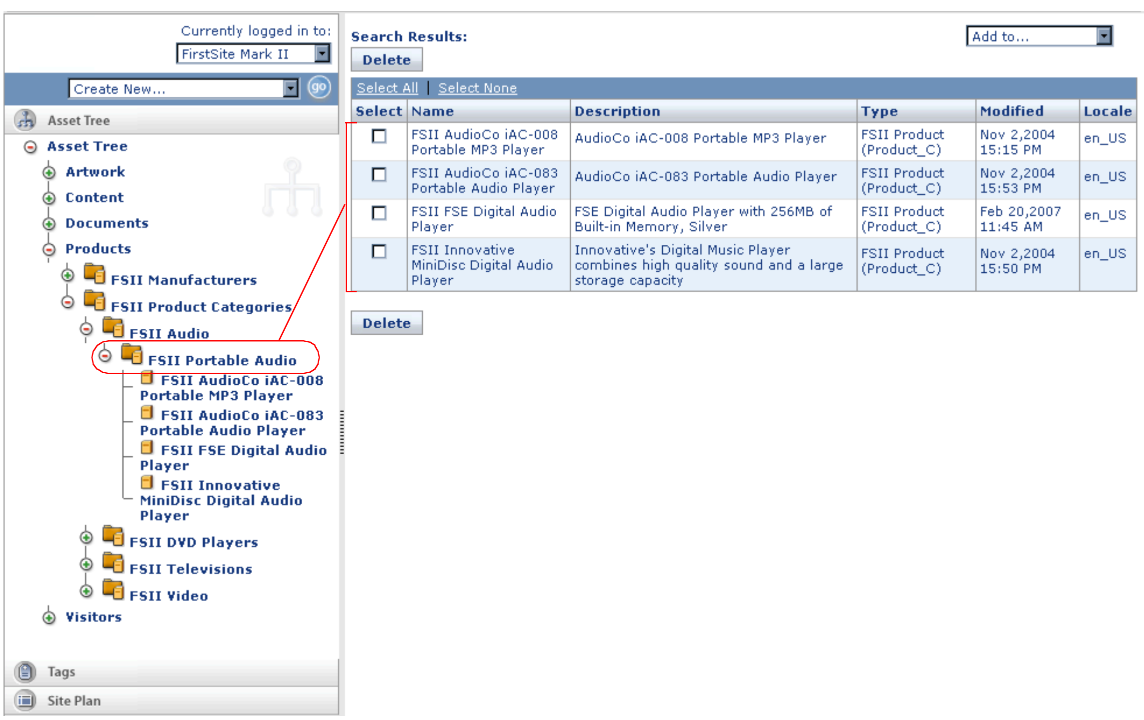
To access assets using the asset tree

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

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

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

   When you expand a node, the workspace displays a list of assets associated with that node. For example, the following figure shows a list of child assets associated with the **FSII Portable Audio** flex parent.



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

   b. **Open the desired asset**. In the list of assets displayed in the workspace, click the asset you want to work with. (You can also click the asset directly in the tree.) Content Server opens the asset in the "Inspect" form.

Switching to Another Site

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

To switch to another site

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

   Note

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

   Content Server logs you in to the site you selected.

Accessing the Advanced Interface

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

- Access Engage functionality (if Engage is installed), such as collections, recommendations, promotions, and segments.
- Perform advanced content management tasks such as configuring, placing, and unplacing "Page" assets, creating and editing templates, and more.
- Perform administrative tasks on your CS system (if you hold administrative privileges).

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

To access the Advanced interface from the top bar

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

   A new browser window opens and the Advanced interface loads.

   Note

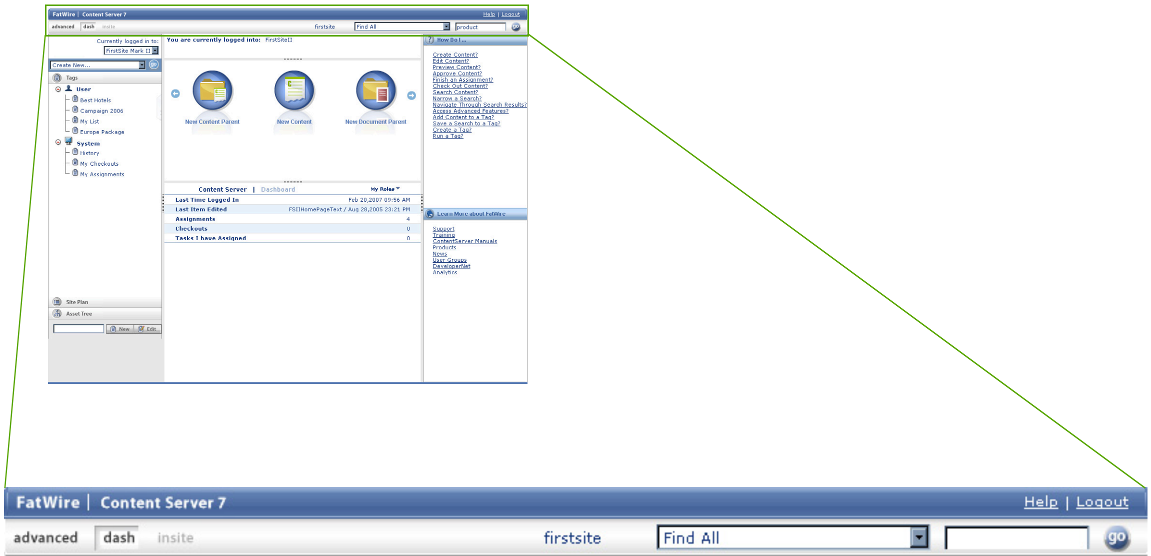
   - When you access the Advanced interface from the top bar, Content Server automatically logs you in to the current site.
   - If you do not have the permissions to use the Advanced interface, the new browser window displays an error message notifying you of that fact. If you have any questions, contact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

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

Quick Reference

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

Top Bar

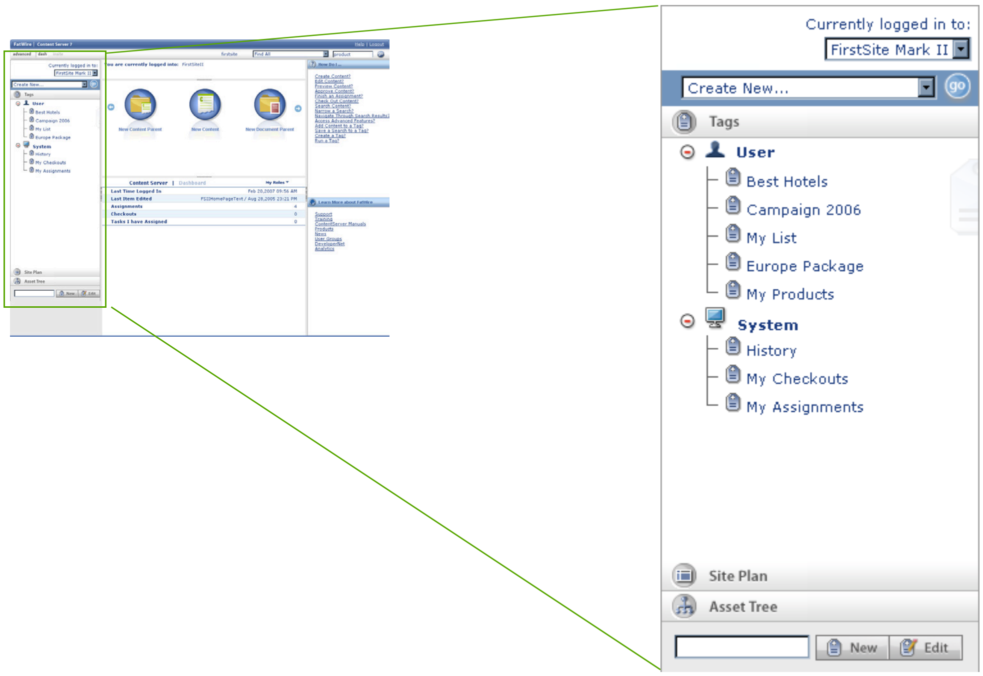


The top bar contains the following functionality:

- **Advanced** – opens Content Server's Advanced interface in a new browser window. See "Accessing the Advanced Interface," on page 53.

  The Advanced interface provides access to Engage functionality and administrative controls of Content Server. For information on working in the Advanced interface, see the *Content Server Advanced Interface User's Guide*.
- **Dash** – returns you to the home view. The home view is the view you see when you log in to the Dashboard interface. See "Workspace: Home View," on page 56.
- ***User name*** – displays your user name.
- **Search** field – allows you to perform a search. See "Finding Assets," on page 82.
- **"Find..." drop-down list** – allows you to limit your search to a specific asset type. See "Finding Assets," on page 82.
- **Help** – opens the FatWire e-docs site in a new browser window.
- **Logout** – ends your session and logs you out of Content Server.

Navigation Pane



Tip

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

The navigation pane provides the following functionality:

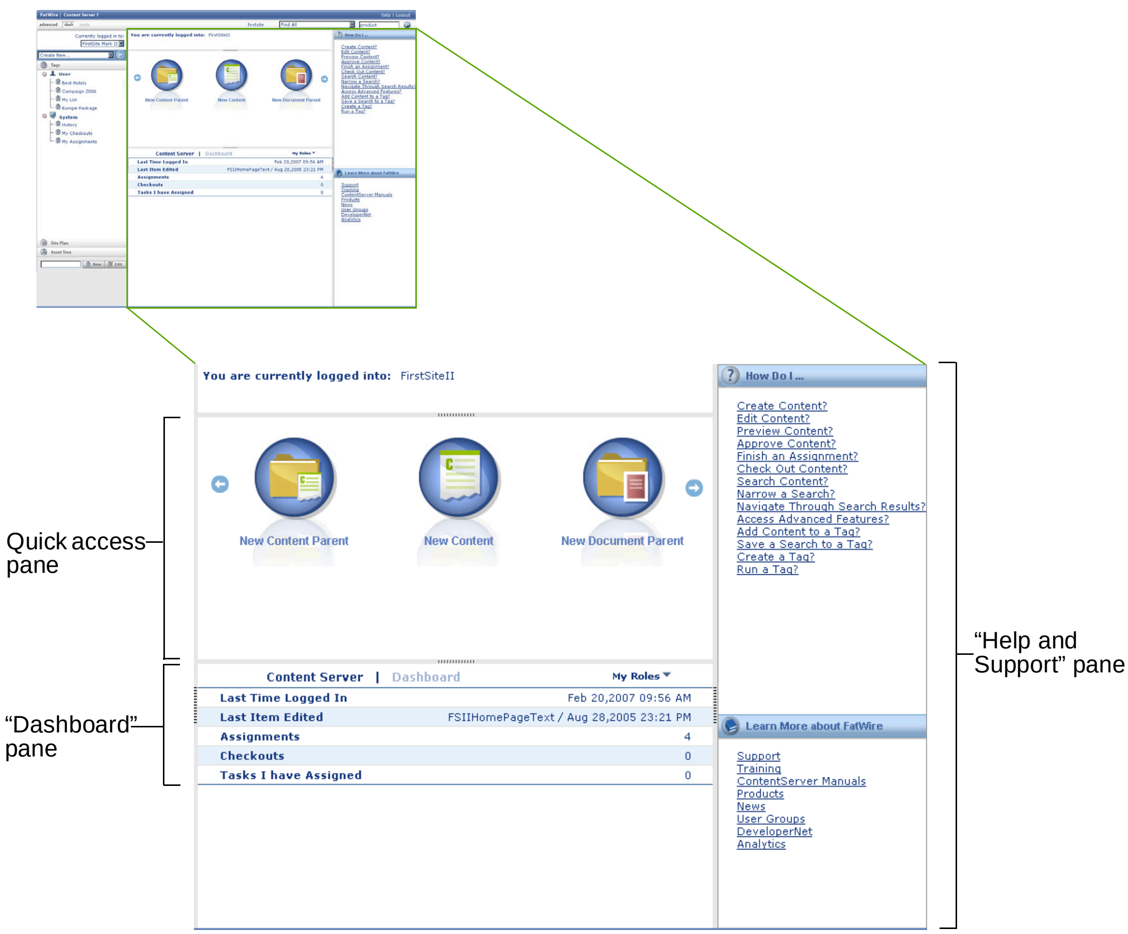
- **"Currently logged in to" drop-down list** – allows you to switch to another CM site, provided you have permissions to work in that site. (The default selection in this drop-down list is the site you are currently logged in to.) See "Switching to Another Site," on page 53.
- **"Create New..." drop-down list** – allows you to create new assets of the asset types available in the list. After you select the desired asset type, click **Go** to display the "New" asset form. Note that the contents of this list are determined by the permissions granted to you by the CS administrator. See "Creating Assets," on page 66.
- **Tags** tree – allows you to create, run, rename, and delete tags. See "Organizing Assets," on page 86.
- **Site Plan** tree – provides a hierarchical view of the way the pages and their associated assets on your site are organized, which helps you visualize the configuration of pages and their contents. It also helps you understand the relationships and dependencies that exist for any given page. For instructions on navigating the site plan, see "Accessing Assets Using the Site Plan Tree," on page 51.
- **Asset Tree** – shows the assets available in the current site, organized according to their respective asset types and flex relationship hierarchies. For instructions on navigating the asset tree, see "Accessing Assets Using the Asset Tree," on page 52.

Workspace: Home View

The home view is the view you see when you log in to Content Server, as shown in Figure 4, on page 42.

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

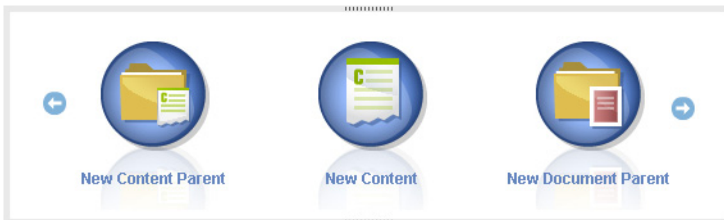
In home view, the workspace displays the following:



- **Quick access pane** – provides shortcuts to creating assets of the asset types that you have permissions to create (permissions are set up by the administrator). For more information, see "Quick Access Pane," on page 57.
- **"Dashboard" pane** – provides a summary of your present workload in the current site, as well as other session-specific information. For more information, see "Dashboard Pane," on page 57.
- **"Help and Support" pane** – provides access to useful resources such as online help, the FatWire e-docs site, and FatWire Support. (Your administrator can customize the contents of this pane.) For more information, see "Help and Support Pane," on page 58.

Quick Access Pane

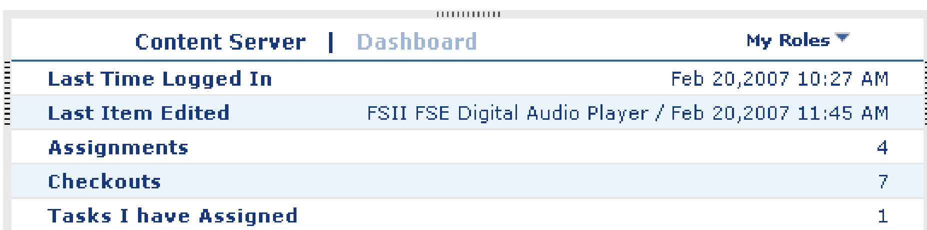
The quick access pane provides shortcuts for creating new assets. Each asset type is represented by a unique icon, as shown below:



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

Dashboard Pane

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



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

Field	Explanation
Last Time Logged In	The date and time you last logged in.
Last Item Edited	The last asset you edited, and the date and time of the edit.
Assignments	The number of workflow assignments you have pending. Click **Assignments** to see a list of assets currently assigned to you to work on.
Checkouts	The number of assets currently checked out to you. Click **Checkouts** to see a list of assets checked out to you.
Tasks I Have Assigned	The number of workflow assignments you have given to other users.

Help and Support Pane

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

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

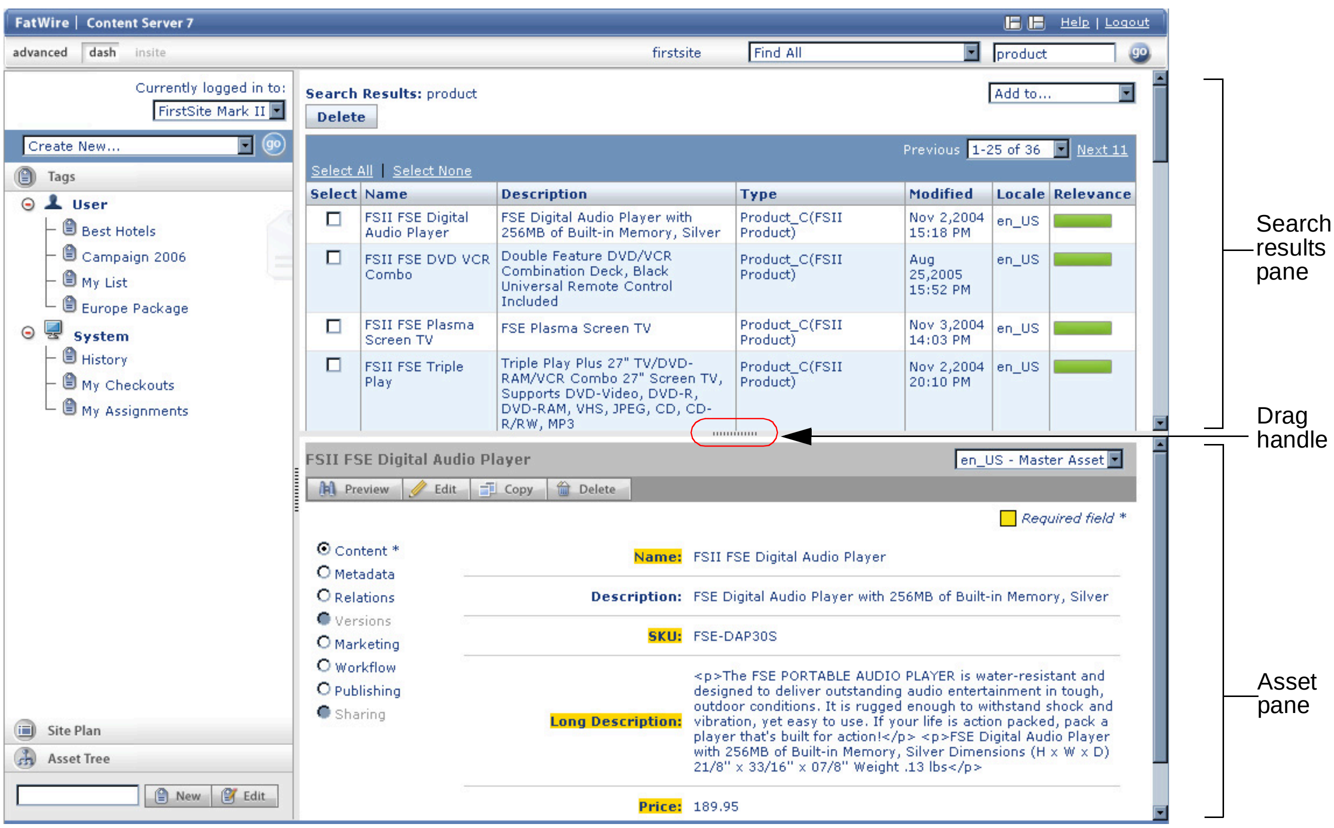
In the default Content Server implementation, the pane contains the following sections:

- **How Do I...** – provides links to instructions for the most commonly performed content management tasks.
- **Learn More** – provides links to useful online resources, including the FatWire e-docs site, FatWire Support, and the FatWire DeveloperNet site.

Workspace: Asset Management View

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

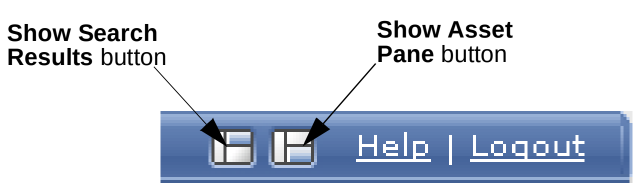
The first time you access an asset after logging in, the list of returned assets fills the workspace. When you click an asset in the list, the asset pane fills the workspace and displays the asset you selected. If you then try to access another asset, the list of assets returned by the function you used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



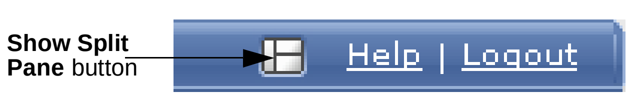
Tip: Drag the pane divider to adjust the size of the panes.

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

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



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



Search Results Pane

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

- Perform a search – Content Server displays a list of assets matching your search criteria. For more information, see “Finding Assets,” on page 82.
- Run a tag – Content Server displays a list of assets returned by the tag. For more information, see “Running a Tag,” on page 87.
- Expand a node in the **Site Plan** tree – Content Server displays a list of assets associated with the node you expanded. See “Accessing Assets Using the Site Plan Tree,” on page 51.
- Expand a node in the **Asset Tree** – Content Server displays a list of children belonging to the node you expanded. See “Accessing Assets Using the Asset Tree,” on page 52.

The search results pane consists of the following components:

Select	Name	Description	Type	Modified	Locale	Relevance
☐	FSII FSE DVD VCR Combo	Double Feature DVD/VCR Combination Deck, Black Universal Remote Control Included	Product_C(FSII Product)	Aug 25,2005 15:52 PM	en_US	
☐	FSII FSE Plasma Screen TV	FSE Plasma Screen TV	Product_C(FSII Product)	Nov 3,2004 14:03 PM	en_US	
☐	FSII FSE Triple Play	Triple Play Plus 27" TV/DVD-RAM/VCR Combo 27" Screen TV, Supports DVD-Video, DVD-R, DVD-RAM, VHS, JPEG, CD, CD-R/RW, MP3	Product_C(FSII Product)	Nov 2,2004 20:10 PM	en_US	
☐	FSII FSE Digital Audio Player	FSE Digital Audio Player with 256MB of Built-in Memory, Silver	Product_C(FSII Product)	Feb 20,2007 16:45 PM	en_US	
☐	FSII AudioCo iAC-008 Portable MP3 Player	AudioCo iAC-008 Portable MP3 Player	Product_C(FSII Product)	Nov 2,2004 20:15 PM	en_US	
☐	FSII AudioCo iAC-083 Portable Audio Player	AudioCo iAC-083 Portable Audio Player	Product_C(FSII Product)	Nov 2,2004 20:53 PM	en_US	
☐	FSII Innovative Hi-Def Projection TV	The Innovative HD Projection TV features incredible resolution (3.28 Million Dots), an integrated ATSC Tuner, and an elegant sle	Product_C(FSII Product)	Nov 2,2004 20:57 PM	en_US	
☐	FSII Innovative MiniDisc Digital Audio Player	Innovative's Digital Music Player combines high quality sound and a large storage capacity	Product_C(FSII Product)	Nov 2,2004 20:50 PM	en_US	
☐	FSII Televisions	We have incredible prices on an excellent selection of Combination, HD and Plasma TVs.	Product_P (FSIICategory)	Nov 2,2004 14:55 PM	en_US	

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

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

Asset Pane

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

- Action Bar
- Form Sections

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

Action Bar

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

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

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

Form Sections

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

The default Content Server implementation contains the following form sections:

Table 2: Asset form sections

This section	Allows you to...
Content	View and edit the content stored in the asset. For more information, see Chapter 3, "Creating and Editing Assets." (Your administrator can customize this section.)
Metadata	View the asset's metadata, such as creation date, asset ID, and any asset type-specific attributes. Modify the asset's **Locale** setting (for more information see "Setting or Changing an Asset's Locale Designation," on page 94). Select a template for the asset. Select a subtype or category for the asset. (Your administrator can customize this section.)
Relations	View the assets this asset is related to or associated with. Create and modify associations for the asset For more information, see "Working with Asset Associations," on page 122. (Your administrator can customize this section.)
Marketing	View and edit Engage (if installed) options for the asset. For more information, see "Rating Assets for Segments," on page 129. (Your administrator can customize this section.)
Workflow	View workflow-related information for the asset. Perform workflow actions, such as finishing your assignments. For more information, see Chapter 9, "Workflow." If no workflow processes are enabled for the current site, this selection is unavailable (greyed-out).
Publishing	Approve the asset for publishing to one or more destinations. Approve dependent (blocking) assets, if asset has dependencies. Monitor the publishing status of the asset. For more information, see Chapter 8, "Approval for Publishing." If no publishing destinations are enabled for the current site, this section is unavailable (greyed-out) in the section selector.

Table 2: Asset form sections *(continued)*

This section	Allows you to...
Sharing	Share the asset with other sites that you have permissions to work with. For more information, see "Sharing Assets with Other Sites," on page 128. If the requirements for sharing the asset (outlined in "Sharing Assets with Other Sites," on page 128) are not met, this section is unavailable (greyed-out) in the section selector.
Versions	View the asset's revision history. Roll asset back to a previous version. For more information, see Chapter 10, "Revision Tracking." If revision tracking is not enabled for the asset type, this selection is unavailable (greyed-out) in the section selector.

Chapter 3

Creating and Editing Assets

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

This chapter contains the following sections:

Creating Assets

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

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

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

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

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 "Create New..." drop-down list for your role. The purpose of personalizing the contents of the "Create New..." drop-down list is to make your job easier.

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

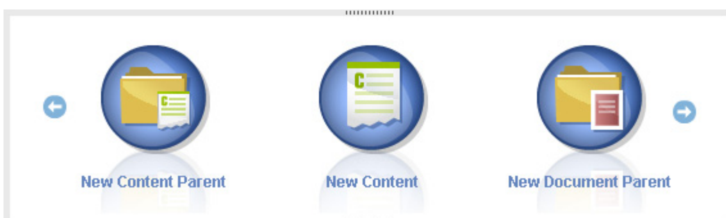
By personalizing the contents of the "Create New..." drop-down list, the administrator makes sure that you can focus on the quality of the content you create, and not on the technical aspects of entering and storing it in the Content Server system.

Creating a New Asset

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

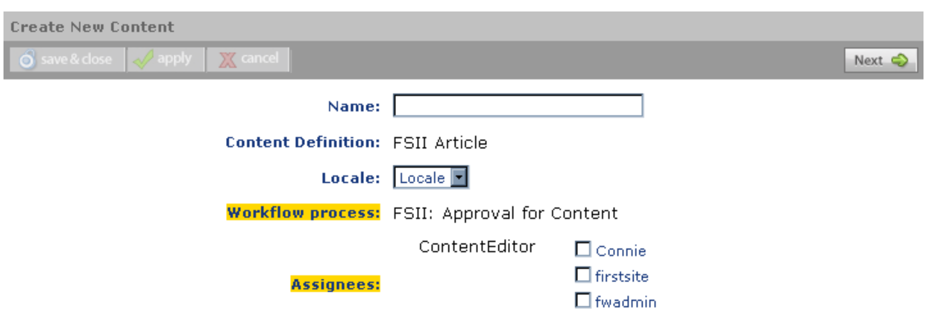
To create a new asset

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



     2) Click the icon representing the desired asset type.

   Content Server displays the “Create New *Asset Type*” form:



3. In the “Create New *Asset Type*” form, do the following:
   a. Enter a name for the asset. Note the following conventions when naming the asset:
      - The name must be between 1 and 64 alphanumeric characters.
      - The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), and question mark (?).
      - The name can contain spaces (except for names of flex attributes), but cannot start with a space.
   b. (Optional) If you plan to create translations of the asset, or if you are required to specify the language of the content you create, select the asset’s target language in the “Locale” drop-down list.

For more information, see Chapter 5, "Working with Multilingual Assets."

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

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

   For more information, see Chapter 9, "Workflow."

d. Click **Next**.

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

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

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

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

   a. When populating the form, take note of the following:
      - **Required fields.** You must fill in all required (highlighted) fields before you are permitted to save the asset. Fill in all other fields as necessary.
      - **Date fields.** You may see a **Date Picker** (little calendar) icon next to a date field. Clicking the icon invokes the Date Picker attribute editor; see "Working with the Date Picker," on page 78 for more information.
      - **Fields that prompt you to select assets.** You may see a field (or fields) that prompt you to select a flex parent or a template, or associate an asset (such as an image) with the asset you are creating.

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

           If the field displays a **Link Asset** (or **Link Parent**) and a **Show Assets** button, proceed to the next step.

        2) Click **Show Assets**.

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

        4) In the list of assets, navigate to the desired asset and select its check box.

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

           Content Server links the asset you selected to the new asset. The name of the linked asset is displayed in the field.

        6) (Optional) If you see **(M)** next to the field, repeat steps 4 and 5 to add another asset (usually, a flex parent) to the field.

   b. Select the next section in the form section selector.

   c. Populate the next section as outlined in step a. Continue until you have populated all required sections (marked with an asterisk). Populate other sections as necessary.

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

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

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

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

6. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section “Assigning an Asset to a Workflow,” on page 148.

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

Creating a New Asset by Copying an Existing Asset

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

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

To create a new asset by copying an existing asset

1. Log in to the site you want to work with.

2. Find and open the asset you want to copy:

   a. Do one of the following:

      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
      - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

      For more information on finding assets, see “Finding Assets,” on page 82.

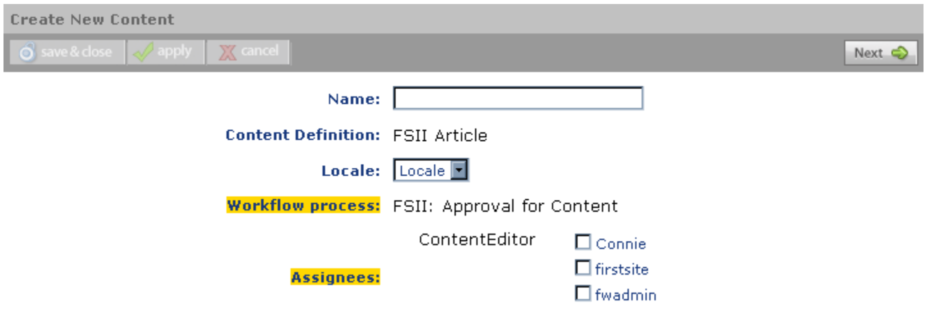
   b. In the list of results, navigate to the desired asset and click its name.

   Content Server displays the asset in the “Inspect” form, underneath the search results.

3. In the action bar, click **Copy**.

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

Content Server displays the “Create New *Asset Type*” form:



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

      Note the following conventions when naming the asset:

      - The name must be between 1 and 64 alphanumeric characters.
      - The following characters are not allowed: single quote ('), double quote ("), semicolon (;), colon (:), and question mark (?).
      - The name can contain spaces (except for names of flex attributes), but cannot start with a space.

   b. (Optional) Set or change the new asset’s locale designation in the “Locale” drop-down list.

      If you do not make a selection, one of the following happens:

      - If the source asset has a locale designation, the new asset will retain the locale designation of the source asset.
      - If the source asset has no locale designation, the new asset will not have a locale designation until you manually assign one.

      For more information, see Chapter 5, “Working with Multilingual Assets.”

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

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

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

      For more information, see Chapter 9, “Workflow.”

   d. Click **Next**.

      An “Edit” form containing the fields and values of the asset you copied appears.

5. Make your changes in the “Edit” form as follows:

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

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

a. For each field, replace the copied content with new content as necessary. When making your changes, take note of the following:

- **Required fields.** Do not leave any required (highlighted) fields blank. If you do, you will not be permitted to save the asset. Make changes to all other fields as necessary.
- **Date fields.** You may see a **Date Picker** (little calendar) icon next to a date field. Clicking the icon invokes the Date Picker attribute editor; see "Working with the Date Picker," on page 78 for more information.
- **Fields that prompt you to select assets.** You may see a field (or fields) that prompt you to select a flex parent or a template, or associate an asset (such as an image) with the asset you are creating.

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

  If the field displays a **Link Asset** (or **Link Parent**) and a **Show Assets** button, proceed to the next step.

  2) Click **Show Assets**.

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

  4) In the list of assets, navigate to the desired asset and select its check box.

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

  Content Server links the asset you selected to the new asset. The name of the linked asset is displayed in the field.

  6) (Optional) If you see **(M)** next to the field, repeat steps 4 and 5 to add another asset (usually, a flex parent) to the field.

b. Select the next section in the form section selector.

c. Populate the next section as outlined in step a. Continue until you have populated all required sections (marked with an asterisk). Populate other sections as necessary.

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

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

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

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

7. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section "Assigning an Asset to a Workflow," on page 148.

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

Creating a New Asset in CS-Desktop

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

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

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.

Creating a New Asset in CS-DocLink

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

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

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.

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

Note

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

Editing Assets in the Dashboard Interface

To edit an asset in the Dashboard interface

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

      For more information on finding assets, see "Finding Assets," on page 82.
   b. In the list of results, navigate to the desired asset and click its name.

   Content Server displays the asset in the "Inspect" form, underneath the search results.
3. In the action bar, click **Edit**.

   Content Server displays the asset in the "Edit" form.
4. Make your changes in the "Edit" form as follows:

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

   If any of the fields or form sections are unfamiliar to you, consult your developers or CS administrator.
   a. For each field, replace the existing content with new content as necessary. When making your changes, take note of the following:

- **Required fields.** Do not leave any required (highlighted) fields blank. If you do, you will not be permitted to save the asset. Make changes to all other fields as necessary.
- **Date fields.** You may see a **Date Picker** (little calendar) icon next to a date field. Clicking the icon invokes the Date Picker attribute editor; see "Working with the Date Picker," on page 78 for more information.
- **Fields that prompt you to select assets**. You may see a field (or fields) that prompt you to select a flex parent or a template, or associate an asset (such as an image) with the asset you are creating.
  1) If the field displays a drop-down list, select the desired asset from the list.

     If the field displays a **Link Asset** (or **Link Parent**) and a **Show Assets** button, proceed to the next step.
  2) Click **Show Assets**.
  3) Content Server displays a list of assets eligible as values for the field.
  4) In the list of assets, navigate to the desired asset and select its check box.
  5) Click **Link Asset** (or **Link Parent**).

     Content Server links the asset you selected to the new asset. The name of the linked asset is displayed in the field.
  6) (Optional) If you see **(M)** next to the field, repeat steps 4 and 5 to add another asset (usually, a flex parent) to the field.

b. Select the next section in the form section selector.

c. Populate the next section as outlined in step a. Continue until you have populated all required sections (marked with an asterisk). Populate other sections as necessary.

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

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

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

6. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section "Assigning an Asset to a Workflow," on page 148.

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

Editing Assets in CS-Desktop

To edit an asset that was created in Microsoft Word, you use the CS-Desktop toolbar, which is added to the Word interface when you install the CS-Desktop client on your local 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 the asset to your desktop. You then open the file in its native application and make the appropriate changes. To save the modified file to the Content Server database, you save it in its native application and then drag it from your desktop back to where you found it in the CS-DocLink hierarchy.

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

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.

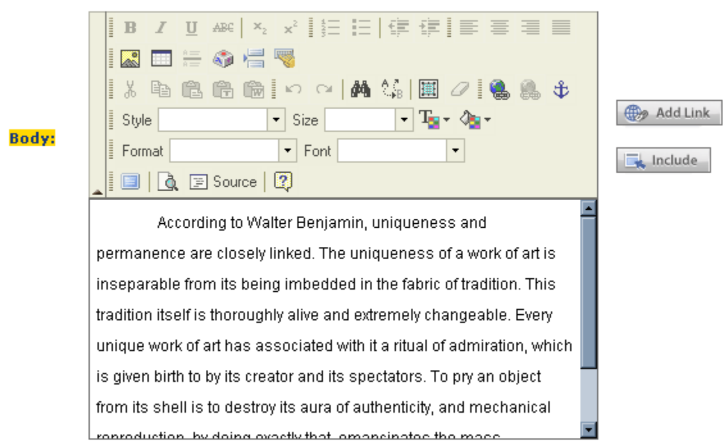
Working with FCKEditor

The Dashboard interface supports the use of FCKEditor, a popular third-party WYSIWYG (What You See Is What You Get) editor.

> **Note**
>
> Your site developers enable FCKEditor on a per-field basis when configuring the asset types for your site.

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 FCKEditor, the editor appears as part of the "Edit" forms, replacing the standard text box for each field that is WYSIWYG-enabled when you click the field to make changes. The example below shows the **Body** field of a "Content" asset, being edited in FCKEditor:

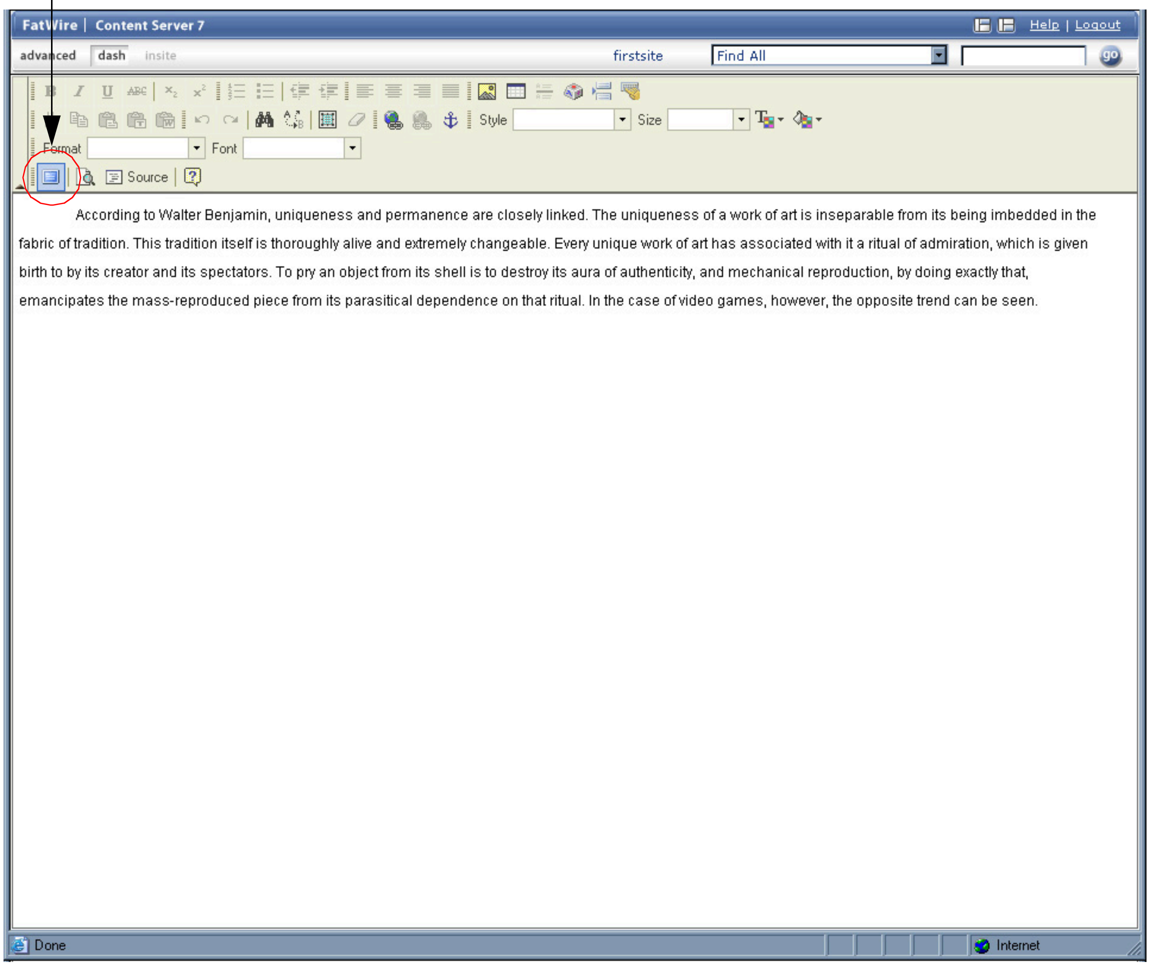


> **Note**
>
> If your FCKEditor toolbar includes an **Upload Image** function, consult your CS administrator before using this function. An image uploaded in this manner is not an asset, and will not be mirror published when the asset that uploaded it is published to the delivery system.

To work more comfortably, you can 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`.

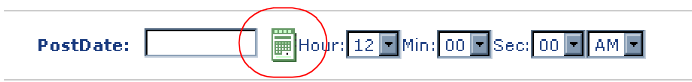
Working with the Date Picker

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).

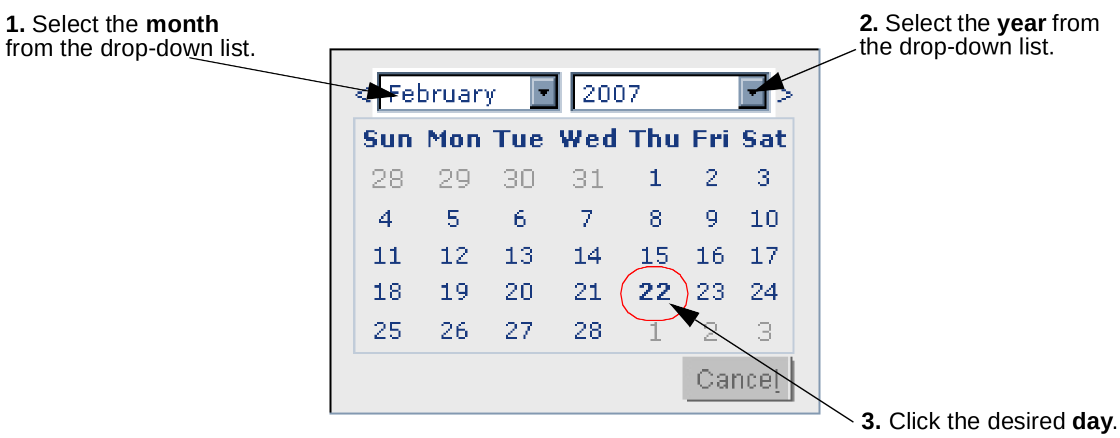
Perform the following steps to enter a date into an field using the Date Picker:

To enter a date into a field 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.



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.

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 cannot delete an asset if it is associated with another asset. 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 a Single Asset

To delete a single asset

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

      For more information on finding assets, see “Finding Assets,” on page 82.

   b. In the search results list, navigate to the desired asset and click its name.

   Content Server opens the asset in the “Inspect” form.
3. In the asset’s “Inspect” form, click **Delete**.

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

Note

If the asset has one or more dependencies preventing it from being deleted, Content Server displays a message identifying the offending dependencies. If that happens, stop here. you must remove the associations between the asset and its dependencies before you can delete the asset.

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

   Once the asset is deleted, Content Server displays a message confirming the deletion. The database status of the asset is changed to “void.” Searches will not retrieve assets that are marked as void.

Deleting Multiple Assets

To delete multiple assets at once

1. Log in to the site you want to work with.
2. Find the assets you want to delete. Do one of the following:
   - In the **Search** field in the top bar, enter search criteria identifying the assets you want to delete, then click **Go**.
   - In the **Tags** tree, select the tag that contains the assets.

   For more information on finding assets, see “Finding Assets,” on page 82.
3. In the list of results, navigate to each asset you want to delete and select its check box.
4. Click **Delete**.

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

   Note

   If one of the assets you want to delete has dependencies preventing it from being deleted, Content Server displays a message identifying the offending dependencies. If that happens, stop here. You must remove the associations between the asset and its dependencies before you can delete the asset.
5. If you are sure you want to delete the asset (or assets), click **Delete**. Otherwise, click **Cancel**.

   Once the assets are deleted, Content Server’s interface displays a message confirming the deletion.The database status of the assets is changed to “void.” Searches will not retrieve assets that are marked as void.

Chapter 4

Finding and Organizing Assets

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

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

This chapter contains the following sections:

- Finding Assets
- Organizing Assets

Finding Assets

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

Search Behavior in the Dashboard Interface

The Dashboard interface, introduced in this release of Content Server, contains search capabilities that differ from those found in the Advanced interface. The differences, due to the integration with the Lucene search engine, are as follows:

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

Search Guidelines

When performing searches in the Dashboard interface, use the guidelines in Table 3 to formulate your search queries. Customizing your search queries allows you to perform more precise searches.

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

Table 3: Lucene search query guidelines

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

Table 3: Lucene search query guidelines *(continued)*

To find...	...do the following	Example
Assets that contain all of the specified terms.	Join the terms with the **AND** operator.	To find assets that contain both **jack** and **jill**, enter **jack AND jill** as your search query.
Assets that contain a specific term but do not contain another term you specify.	Exclude the unwanted terms using the **NOT** operator.	To find assets that contain **jack** but do not contain **jill**, enter **jack NOT jill** as your search query.
Assets that must contain a specific term and may contain another term you specify.	Precede a term with the **+** (required) operator to indicate it is a required term.	To find assets that must contain **jack** and may contain **jill**, enter **+jack jill** as your search query.
Assets that contain a specific term, excluding assets that also contain another term you specify.	Precede a term with the **-** (prohibited) operator to indicate the exclusion.	To find assets that contain **jack** but exclude those that also contain **jill**, enter **jack -jill** into as your search query.
Assets that contain terms similar in spelling to the term you specify.	Append the **~** (tilde) operator to a term to perform a fuzzy search on that term.	To find assets that contain **jack**, including occurrences that are misspelled, enter **jack~** as your search query.

Searching for Assets

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

To search for an asset

1. Log in to the site you want to work with.
2. Specify your search criteria. In the top bar, do the following:
   a. (Optional) In the “Find All” drop-down list, select the asset type to which you want to limit your search. If you do not make a selection, Content Server will search across all asset types in the current site.
   b. In the **Search** field, enter the desired search criteria. Refer to “Search Guidelines,” on page 82 to find out how to formulate your search query to narrow the scope of your search.
3. Click **Go**.

> **Note**
>
> In the Dashboard interface, your search results are based on information drawn from a database index which is updated at regular intervals. As such, your search results may not include the changes that occured since the last index update, until the next update occurs. If you have questions, consult your CS administrator.

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

Select	Name	Description	Type	Modified	Locale	Relevance
☐	FSII FSE DVD VCR Combo	Double Feature DVD/VCR Combination Deck, Black Universal Remote Control Included	Product_C(FSII Product)	Aug 25,2005 15:52 PM	en_US	
☐	FSII FSE Plasma Screen TV	FSE Plasma Screen TV	Product_C(FSII Product)	Nov 3,2004 14:03 PM	en_US	
☐	FSII FSE Triple Play	Triple Play Plus 27" TV/DVD-RAM/VCR Combo 27" Screen TV, Supports DVD-Video, DVD-R, DVD-RAM, VHS, JPEG, CD, CD-R/RW, MP3	Product_C(FSII Product)	Nov 2,2004 20:10 PM	en_US	
☐	FSII FSE Digital Audio Player	FSE Digital Audio Player with 256MB of Built-in Memory, Silver	Product_C(FSII Product)	Feb 20,2007 16:45 PM	en_US	
☐	FSII AudioCo iAC-008 Portable MP3 Player	AudioCo iAC-008 Portable MP3 Player	Product_C(FSII Product)	Nov 2,2004 20:15 PM	en_US	
☐	FSII AudioCo iAC-083 Portable Audio Player	AudioCo iAC-083 Portable Audio Player	Product_C(FSII Product)	Nov 2,2004 20:53 PM	en_US	
☐	FSII Innovative Hi-Def Projection TV	The Innovative HD Projection TV features incredible resolution (3.28 Million Dots), an integrated ATSC Tuner, and an elegant sle	Product_C(FSII Product)	Nov 2,2004 20:57 PM	en_US	
☐	FSII Innovative MiniDisc Digital Audio Player	Innovative's Digital Music Player combines high quality sound and a large storage capacity	Product_C(FSII Product)	Nov 2,2004 20:50 PM	en_US	
☐	FSII Televisions	We have incredible prices on an excellent selection of Combination, HD and Plasma TVs.	Product_P (FSIICategory)	Nov 2,2004 14:55 PM	en_US	

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

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

5. If you want to do one of the following, select the check box in the **Select** column next to each asset on which you want to perform the desired operation:
   - Add assets to a tag — proceed to step 5 in "Adding Assets to a Tag" on page 87.
   - Remove assets from a tag — proceed to step 5 in "Removing Assets from a Tag" on page 88.
   - Delete assets — proceed to step 4 in "Deleting Multiple Assets" on page 80.

Navigating Through Your Search Results

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

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

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

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

Saving the Results of Your Search

To save the results of the search you performed, proceed to step 4 of the procedure, "Adding Assets to a Tag," on page 87.

Organizing Assets

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

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

Note

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

Types of Tags

Content Server supports the following types of tags:

System Tags

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

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

You cannot create, modify, or delete system tags.

User Tags

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

Note

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

Creating a Tag

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

To create a new tag

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. In the **New Tag** field at the bottom of the navigation pane, enter a name for the new tag.
4. Click **New**.

   The new tag appears under the **User** node in the **Tags** tree.

Adding Assets to a Tag

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

To add assets to a tag

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar in the navigation pane.
3. Perform a search, as described in "Searching for Assets," on page 84.
4. In the search results, select the check box next to each asset you want to add to a tag.
5. (Optional) If you want to create a new tag to hold the assets, enter a name for your new tag in the **New Tag** field at the bottom of the navigation pane, then click **New**.

   The new tag appears in the **Tags** tree and in the "Add To …" drop-down list above the search results.
6. In the "Add To…**"** drop-down list, select the tag you want to add the assets to.

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

Running a Tag

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

To run a tag

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

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

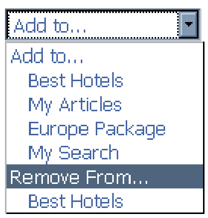
Removing Assets from a Tag

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

To remove assets from a tag

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

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



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

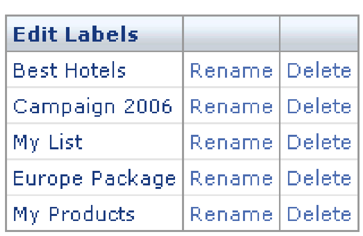
Renaming a Tag

This section shows you how to rename a tag.

To rename a tag

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

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



Edit Labels		
Best Hotels	Rename	Delete
Campaign 2006	Rename	Delete
My List	Rename	Delete
Europe Package	Rename	Delete
My Products	Rename	Delete

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

The name of the tag becomes an editable field.

Edit Labels		
Best Hotels	Rename	Delete
Campaign 2006	Save	Delete
My List	Rename	Delete
Europe Package	Rename	Delete
My Products	Rename	Delete

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

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

Deleting a Tag

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

To delete a tag

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

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

Edit Labels		
Best Hotels	Rename	Delete
Campaign 2006	Rename	Delete
My List	Rename	Delete
Europe Package	Rename	Delete
My Products	Rename	Delete

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

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

Chapter 5

Working with Multilingual Assets

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

This chapter contains the following sections:

Overview

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

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 4, on page 93 for information on how asset relationships are handled when you create translations of assets.

Note

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

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

If you have any questions, contact your CS administrator.

Table 4: Asset relationship behavior for multilingual assets

Relationship Type	Behavior
Named and Unnamed Associations	When an asset containing named or unnamed 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

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

Setting or Changing an Asset's Locale Designation

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

If you want to create a translation of an asset that has no locale designation, follow the steps below, then continue on to step 3 of the next section, "Creating a Translation of an Asset," on page 95.

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

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

To set or change an asset's locale designation

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

      For more information on finding assets, see "Finding Assets," on page 82.
   b. In the search results list, navigate to the desired asset and click its name.

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

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

      Content Server displays the asset in the "Inspect" form, showing the new locale.
   e. (Optional) If your next step is to create a translation of the asset, switch back to the **Content** section of the "Inspect" form by clicking **Content** in the form section selector, and proceed to step 3 of the next section, "Creating a Translation of an Asset," on page 95.

Creating a Translation of an Asset

Note

- Before you can create a translation of an asset, the asset must have a locale designation already assigned to it. (The asset's locale is listed in the **Metadata** section of the asset form and is typically assigned by the user who creates the asset.) If the asset does not have a locale designation, follow the steps in "Setting or Changing an Asset's Locale Designation," on page 94, then skip to step 3 of this procedure.
- If you are creating the first translation of an asset, you are automatically creating a multilingual set consisting of the source asset and the translation. The source asset will be automatically designated as the master asset of the multilingual set.

To create a translation of an asset

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

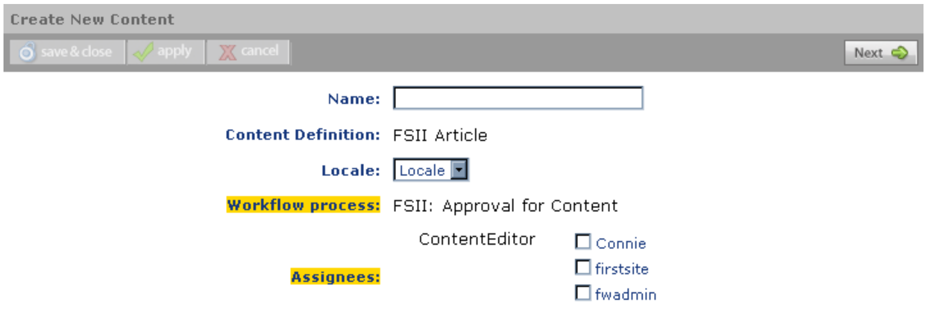
      For more information on finding assets, see "Finding Assets," on page 82.
   b. In the search results list, navigate to the desired asset and click its name.

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

Note

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

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



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

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

      Note the following conventions when naming the asset:

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

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

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

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

      For more information, see Chapter 9, "Workflow."

   c. Click **Next**.

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

5. Translate the asset as follows:

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

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

   a. For each field, replace the copied content with an appropriate translation. When making your changes, take note of the following:

      - **Required fields.** Do not leave any required (highlighted in yellow) fields blank. If you do, you will not be permitted to save the asset. Make changes to all other fields as necessary.
      - **Date fields.** You may see a **Date Picker** (little calendar) icon next to a date field. Clicking the icon invokes the Date Picker attribute editor; see "Working with the Date Picker," on page 78 for more information.

- **Fields that prompt you to select assets**. You may see a field (or fields) that prompt you to select a flex parent or a template, or associate an asset (such as an image) with the asset you are creating.
  1) If the field displays a drop-down list, select the desired asset from the list.

     If the field displays a **Link Asset** (or **Link Parent**) and a **Show Assets** button, proceed to the next step.
  2) Click **Show Assets**.
  3) Content Server displays a list of assets eligible as values for the field.
  4) in the list of assets, navigate to the desired asset and select its check box.
  5) Click **Link Asset** (or **Link Parent**).

     Content Server links the asset you selected to the new asset. The name of the linked asset is displayed in the field.
  6) (Optional) If you see **(M)** next to the field, repeat steps 4 and 5 to add another asset (usually, a flex parent) to the field.

b. Select the next section in the form section selector.

c. Populate the next section as outlined in step a. Continue until you have populated all required sections (marked with an asterisk). Populate other sections as necessary.

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

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

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

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

7. (Optional) If the asset is not preassigned to a workflow and you want to use the workflow feature, you can assign the asset to a workflow process as described in the section "Assigning an Asset to a Workflow," on page 148.

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

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

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

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

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

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

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

See Table 4, on page 93 for information on how Content Server handles asset relationships with respect to multilingual assets.

c. (Optional) If in step b you determined that one or more assets associated with the translation asset have to be translated, translate each asset requiring translation by repeating this procedure, then follow the steps in "Associating Assets," on page 123 to associate the translated versions with the translation asset you created in the previous steps.

Examining the Available Translations of an Asset

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

To check whether a specific translation of an asset exists

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

     For more information on finding assets, see "Finding Assets," on page 82.
   - **b.** In the search results list, navigate to the desired asset and click its name.

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

Note

If the drop-down list does not contain a **Show in *locale*** entry for the desired language, stop here. The asset has not yet been translated into that language. You can translate the asset by following the steps in "Creating a Translation of an Asset," on page 95.

4. (Optional) If you want to open a specific translation of the asset for viewing, select the corresponding **Show in *language*...** entry from the "Locales" drop-down list.
5. (Optional) If you want to compare the asset to one of its translations, follow the instructions in step 4 on page 99.

Comparing Language Versions

If at least one translation of an asset exists in the current site, you can edit two language versions of the asset side by side by toggling the locale compare mode on.

To compare two language versions of an asset

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

      For more information, see "Finding Assets," on page 82.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. (Optional) If you want to make changes to the selected asset while comparing it to another language version, click **Edit** in the action bar. (For more information, see "Editing Assets," on page 73.)

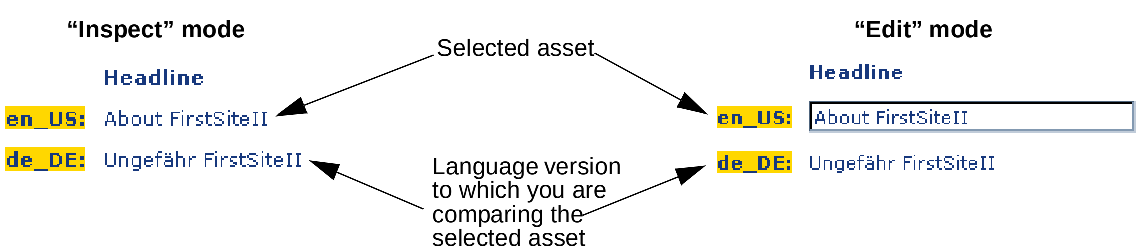
   Content Server displays the asset in the "Edit" form.
4. Toggle the locale "Compare" mode on and choose the language version to which you want to compare the selected asset.
   1) In the action bar, select the **Compare** check box.

      Note

      If you do not see the Compare check box, stop here. No translations of the asset you are viewing exist yet. You can translate the asset by following the steps in "Creating a Translation of an Asset," on page 95.

      The "Compare Locale" drop-down list appears in the action bar.
   2) In the "Compare Locale" drop-down list, select the language version you want to compare to the selected asset.

   The asset form switches to the locale "Compare" mode. In this mode, each field is shown twice: the selected asset on top, and the language version to which you are comparing the selected asset underneath.



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

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

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

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

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

Changing the Master Asset of a Multilingual Set

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

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

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

To change the master asset of a multilingual set

> **Note**
>
> Note the following:
>
> - The master asset of a multilingual set is indicated in the “Locales” drop-down list in the action bar.
> - If a multilingual set is being revision-tracked, you must manually check out all members of the set before you can change the set’s master asset. For instructions, see “Checking Out Assets,” on page 169.

1. Log in to the site you want to work with.
2. Find the master asset of the multilingual set:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.

- If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

For more information on searching, see "Finding Assets," on page 82.

b. In the search results list, navigate to the desired asset and click its name.

Content Server displays the asset in the "Inspect" form.

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

Content Server displays the selected translation in the "Inspect" form.

4. In the action bar, click **Make Master**.

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

Chapter 6

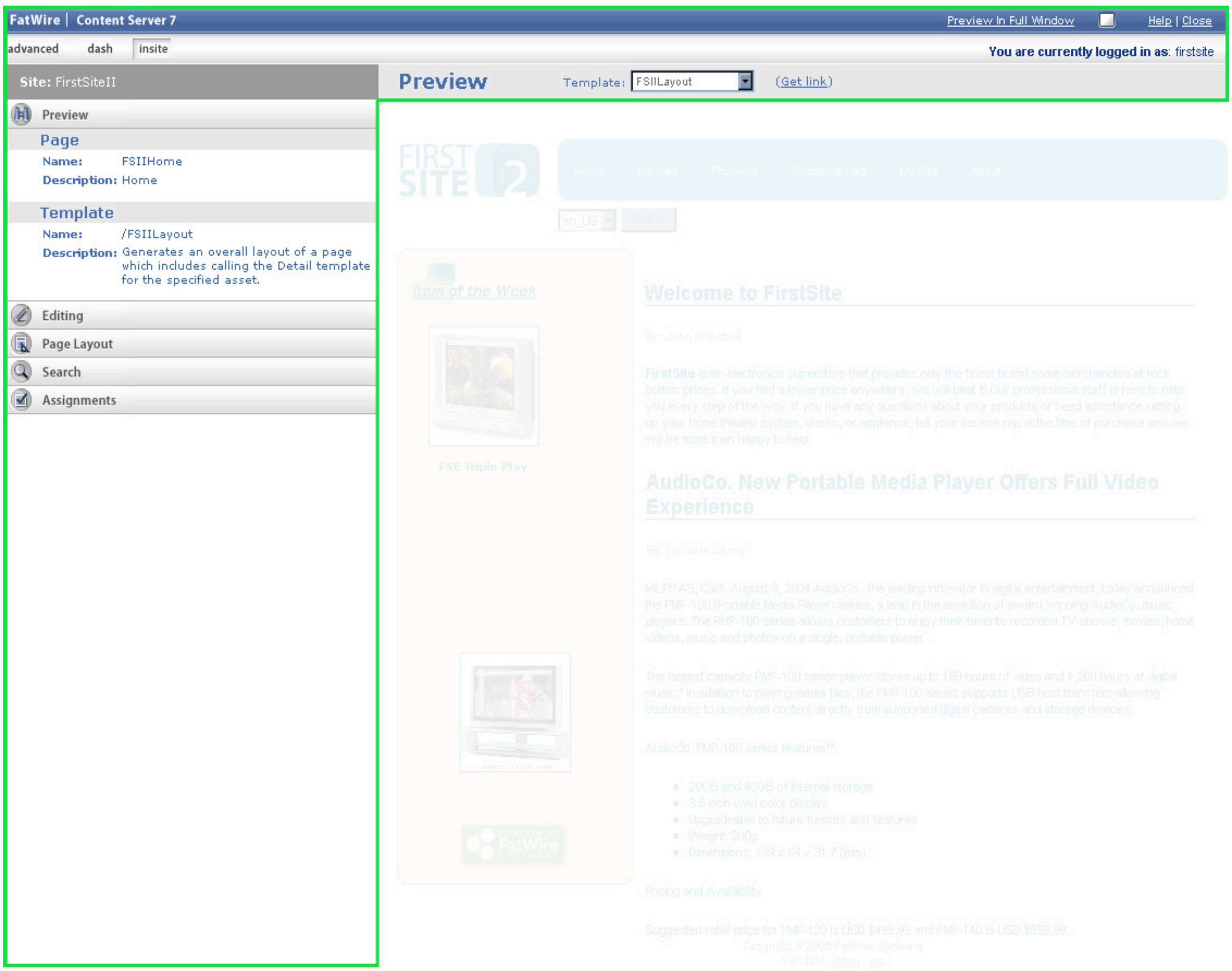
Working with the InSite Interface

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

This chapter contains the following sections:

Overview

Business users who do not ordinarily work in Content Server’s 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 106.
- **Editing** – allows you to edit content directly on a rendered page. For more information, see "Editing Assets in the InSite Interface," on page 109.
- **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 111.

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 117.
- **Assignments** – allows you to finish your workflow assignments. For instructions, see "Finishing Your Workflow Assignments Using the InSite Interface," on page 118.

Accessing the InSite Interface

Note

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

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

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

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

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

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

  Note

  Use the **Get Link** function to obtain the InSite URL for an asset. Once you have the URL, you can give it to another user so that he or she can work on the asset in the InSite interface (assuming the user has the appropriate permissions). For more information, see "Obtaining the InSite URL for an Asset," on page 120.

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

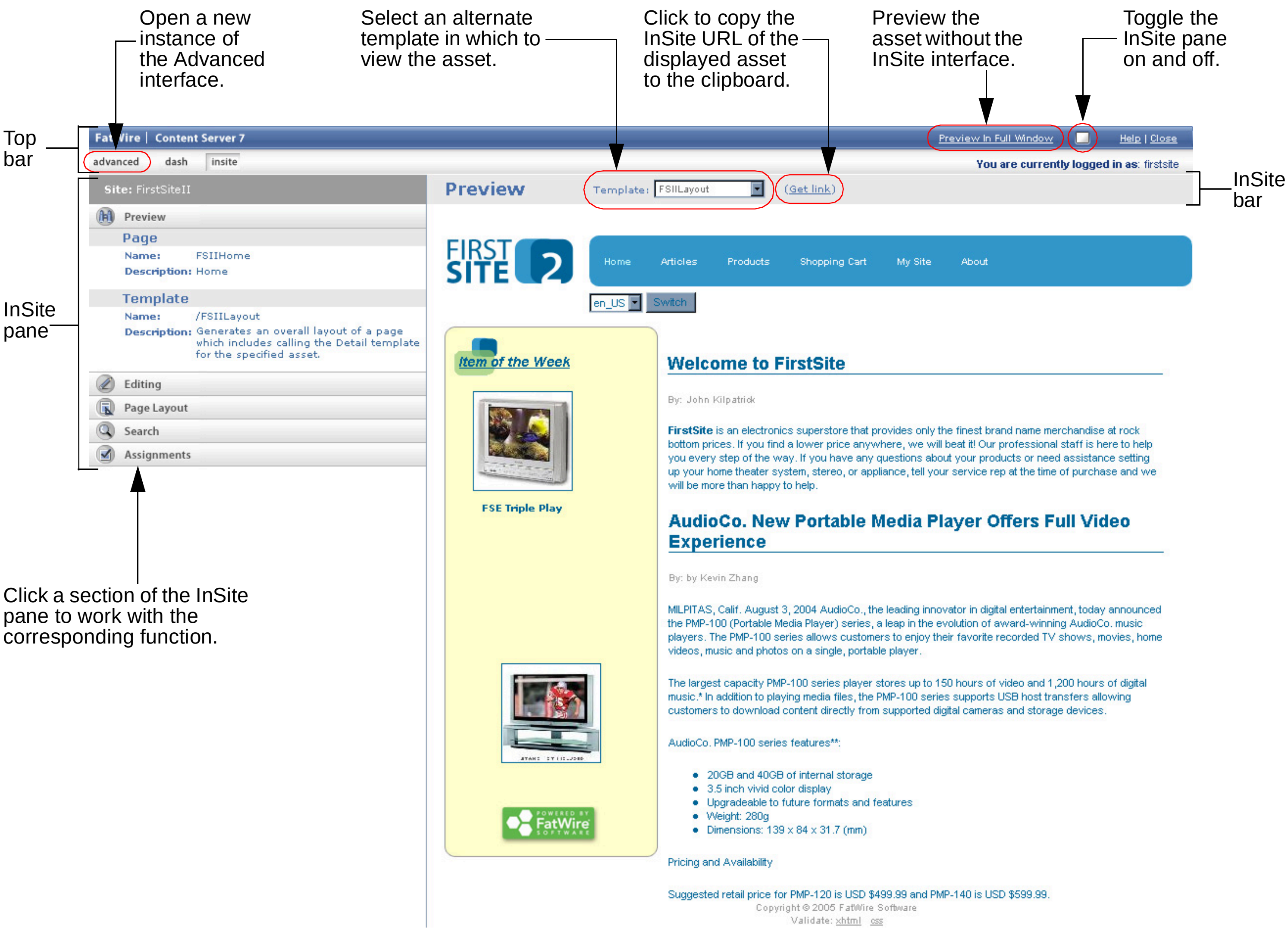
You can only preview an asset that has a template assigned in the **Template** field (located in the **Metadata** section of the asset form).

If you have any questions, consult your site designers or CS administrator.

To preview an asset

1. Log in to the site you want to work with.
2. Find and open the asset you want to preview. Do the following:
   a. (Optional) If you want to limit your search to a specific asset type, select the asset type from the “Find All” drop-down list.
   b. In the **Search** field in the top bar, enter the desired search criteria and click **Go**.
      For more information on searching, see “Finding Assets,” on page 82.
   c. In the search results list, navigate to the desired asset and click its name.
      Content Server opens the selected asset in the “Inspect” form.
3. Preview the asset. In the action bar at the top of the asset form, click **Preview**.
   Content Server opens a new browser window and displays the selected asset in the InSite interface.

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



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

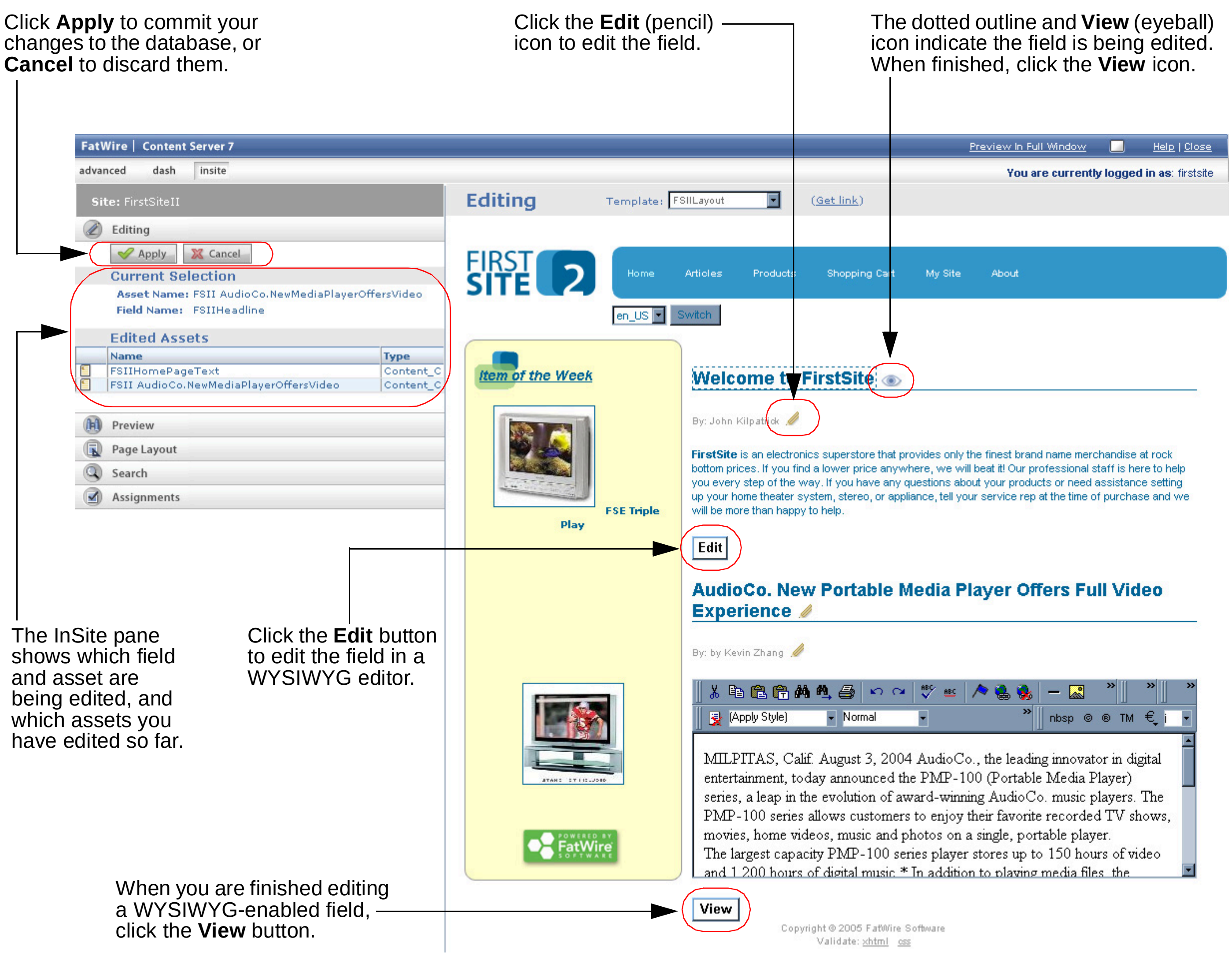
- **InSite pane** – displays the type, name, and template (including descriptions) of the asset you are working with; allows you to switch between InSite modes (“Preview,” “Editing,” or “Page Layout”), search for assets, and finish your workflow assignments.
- **Top bar** – allows you to open a new instance of the Advanced interface; preview the asset without displaying the InSite interface; toggle the InSite pane on and off; access the FatWire 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 109.
   - 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 111.
   - Find other assets to work on in the InSite interface. For instructions, see “Searching for Assets Using the InSite Interface,” on page 117.
   - Finish your workflow assignments. For instructions, see “Finishing Your Workflow Assignments Using the InSite Interface,” on page 118.
   - Obtain the InSite URL for the asset. For instructions, see “Obtaining the InSite URL for an Asset,” on page 120.

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 106.
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.



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 a field of your choice and make changes to the contents of the field. The difference between the **Edit** icon and button is as follows:
   - 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 field. You cannot, however, alter the appearance of the text.
   - The **Edit** button indicates a field that can be edited in an embedded WYSIWYG editor (such as FCKEditor). When you click the **Edit** button, the WYSIWYG editor replaces the field and displays the field's contents in editable form. You can then make your edits to both the text and its appearance. (See "Working with FCKEditor," on page 76 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 on the page. Toggle the pane back on when you are ready to commit your changes to the database. (Use the **Toggle InSite Pane** button near the right end of the top bar to toggle the pane off and on).
   - If an editable field is protected by revision tracking, a lock icon replaces the **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 work on another asset using the InSite interface, find the asset by performing the steps in "Searching for Assets Using the InSite Interface," on page 117, 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:

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 106.
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 111.
   - If you do not see slots on the page, stop here. The page does not support slots.

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

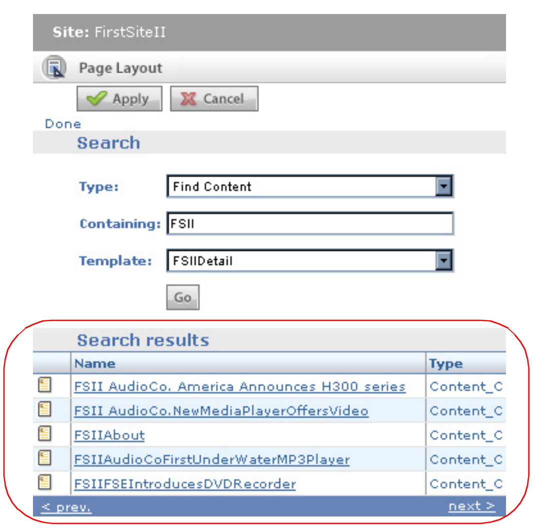
   a. In the "Type" drop-down list, select the type of asset you want to find.

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

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

   d. Click **Go**.

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



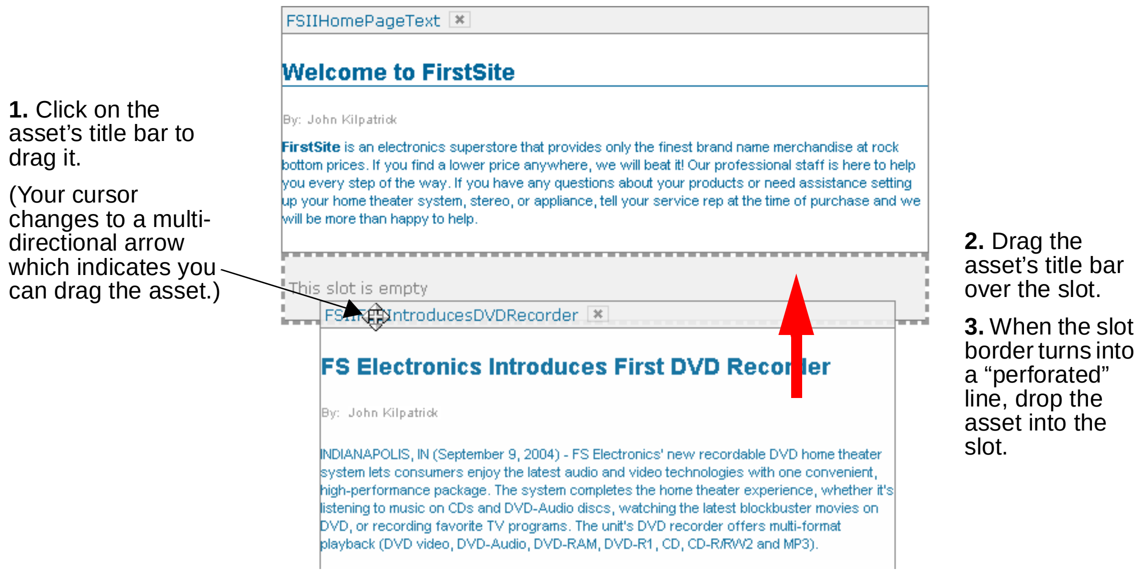
e. In the list of search results, navigate to the desired asset. The list shows five assets at a time, sorted alphabetically. Do the following:

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

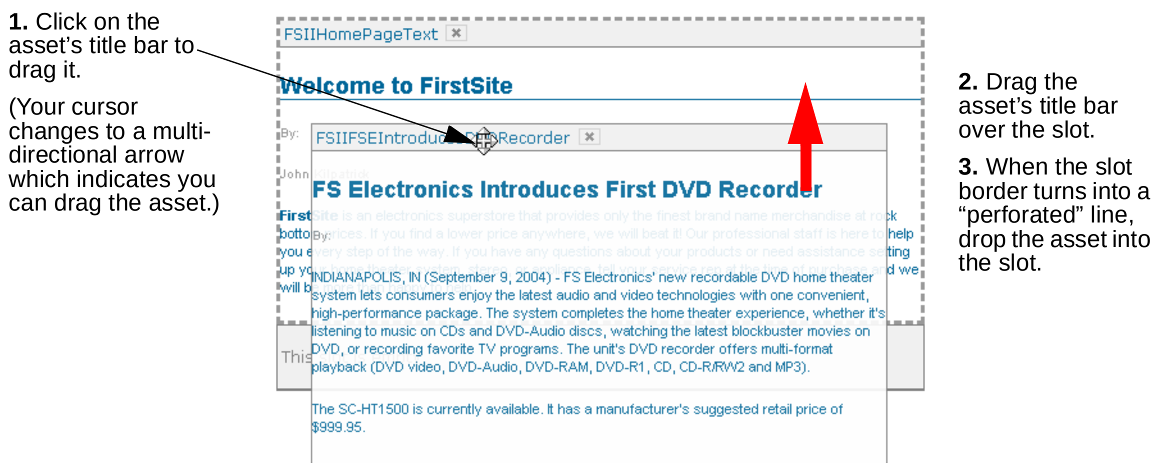
5. In the list of search results, select the asset you want to add to the page.

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

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



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



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

Note

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

7. In the InSite pane, click **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.

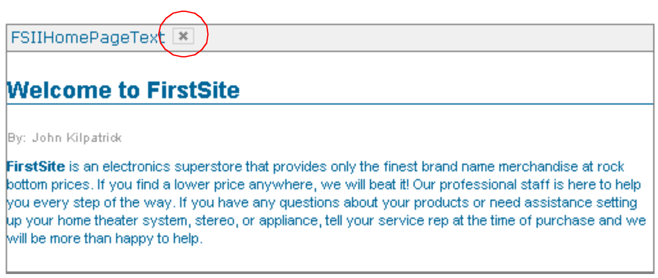
To remove content from a page using the InSite interface

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 106.
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 111.
   - 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 112.

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 106.
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 111.

- 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.

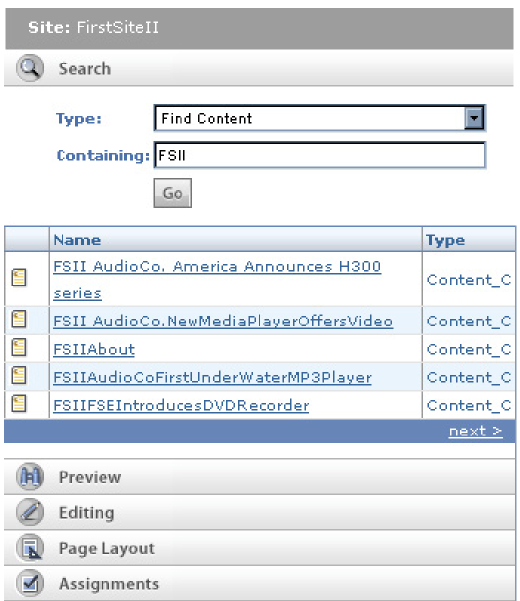
Searching for Assets Using the InSite Interface

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.



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

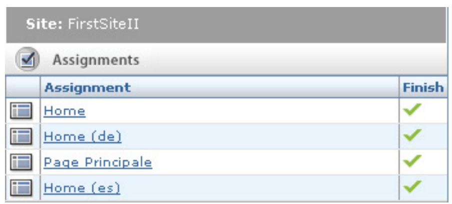
Finishing Your Workflow Assignments Using the InSite Interface

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 9, “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 **Assignments** section displays a list of your current workflow assignments.



3. (Optional) If you have not yet completed the necessary work on the assigned asset, 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 109 and “Managing Page Content Using the InSite Interface,” on page 111, 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.

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:

In such case, do one of the following:

- If you do not want to choose assignees for this assignment, click **Apply** without making a selection. 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 assignees for this assignment, 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 106.
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.

Chapter 7

Associations, Links, Sharing, and Ratings

Content Server offers advanced asset management features such as link embedding, sharing assets across sites, associating assets with one another, and deciding which assets to show to which visitors by rating the assets for segments. This chapter shows you how to use those features in the Dashboard interface.

This chapter contains the following sections:

- Working with Asset Associations
- Embedding Links Within Assets
- Sharing Assets with Other Sites
- Rating Assets for Segments

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 the supporting assets with your article so that you can publish them together as a set. By associating your “Article” asset with its supporting “Image” 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 parent asset’s “Edit” form; the name of each field is the name of each association defined for that asset type.

For example, the “Product” asset type included in the FirstSite II sample site contains several predefined associations with “Media” assets — when you select a “Media” asset in the **Image** field of a “Product” asset, the selected “Media” asset becomes a child of the “Product” asset. (This does not, however, prevent that “Media” asset from becoming a child of other assets.) For example, the field for an associated image in the sample “Product” asset’s “Edit” form appears as follows:

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 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

To work with unnamed associations, use the Advanced interface (accessible via the **Advanced** link in the top bar). Contact your CS administrator to find out if you have the permissions to work in the Advanced interface.

Associating Assets

This procedure uses the FirstSite II sample site as an example and therefore assumes that a named association between the "Content" and "Media" asset types has already been created.

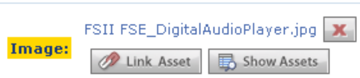
To associate an asset with another asset through a named association

1. Log in to the site you want to work with.
2. Do one of the following, as desired:
   - Begin creating a new parent asset (for instructions, see "Creating Assets," on page 66). When the "Edit" form appears, proceed to step 3 of this procedure.
   - Open an existing parent asset for editing (for instructions, see "Editing Assets," on page 73). When the "Edit" form appears, proceed to step 3 of this procedure.
3. In the "Edit" form, navigate to the field representing the desired association and click the **Show Assets** button next to the field.

   Content Server displays a list of assets eligible as a value for the selected field.
4. In the list of assets, select the check box next to the asset you want to link with the parent asset.
5. In the parent asset's "Edit" form, click **Link Asset** next to the selected field.

   Content Server associates the asset you selected in step 4 with the parent asset. The name of the associated asset appears in the selected field.

6. (Optional) Repeat steps 3–5 for each additional association you want to complete.
7. When you are finished, click **Save & Close** in the action bar.

   Content Server displays the asset in the "Inspect" form, showing the newly associated assets.

Disassociating Assets

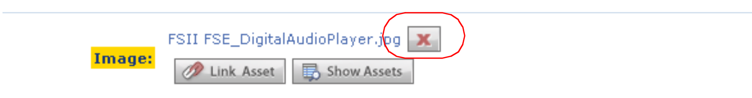
To disassociate an asset from another asset

1. Log in to the site you want to work with.
2. Find and open the parent asset from which you want to disassociate one or more children:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
      - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

      For more information on searching, see "Finding Assets," on page 82.
   b. In the list of results, navigate to the desired asset and click its name.

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

   Content Server displays the asset in the "Edit" form.
4. In the "Edit" form, navigate to the field representing the desired association and click the **Disassociate** (red **X**) button next to the field.



   Content Server disassociates the child asset from the parent asset.
5. In the action bar, click **Save & Close**.

   Content Server displays the asset in the "Inspect" form, showing your changes.

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 a related 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.
- 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.

  When site visitors access content containing this type of link, Content Server automatically embeds the content from the linked asset at the specified insertion point.

The extent to which these capabilities are available to you depends on how your site designers have implemented them as part of the custom asset design. For example, the

"Content" asset type that ships with the FirstSite II sample site supports both types of embedded links in its **Body** field.

Note

Only WYSIWYG-enabled fields support link embedding. (For more information, see "Working with FCKEditor," on page 76.)

Embedding an Internal Link

An internal link is one that invokes another asset within the current site. You cannot link to an asset from another site unless you or another user explicitly shares that asset to the current site. (For more information, see "Sharing Assets with Other Sites," on page 128.)

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 in which field you would like to embed the link before starting the procedure.

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

1. Log in to the site you want to work with.
2. Find and open the asset in which you want to embed an internal link:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
      - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

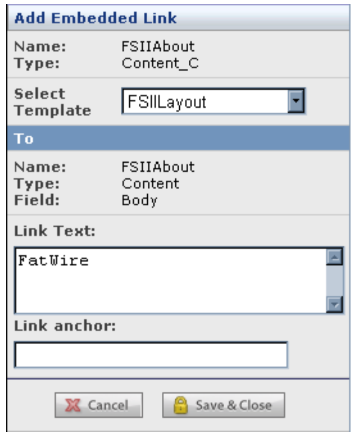
      For more information on searching, see "Finding Assets," on page 82.
   b. In the list of results, navigate to the desired asset and click its name.

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

   Content Server displays the asset in the "Edit" form.
4. Find the asset which will be referenced by the internal link. Do one of the following:
   - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
   - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)
5. In the list of results, navigate to the desired asset and select its check box.
6. In the "Edit" form, click within the field into which you want to embed an internal link. When FCKEditor loads, highlight the text you would like to be hyperlinked. (Alternatively, you can add new text and highlight it.)

7. Click the field's **Add Link** button.

   The "Add Embedded Link" pop-up window appears:



8. In the pop-up window, do the following:

   a. (Optional) In the "Select Template" drop-down list, select the template that will be used to display 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 & Close** to save the embedded link and close the pop-up window.

   The pop-up window closes and Content Server embeds the hyperlink into the selected field. The text you selected turns blue to indicate it is hyperlinked.

9. In the action bar, click **Save & Close** to save the asset.

   Content Server displays the asset in the "Inspect" form, showing your changes.

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.) You cannot embed the contents of an asset from another site unless you or another user explicitly shares that asset to the current site. Consult your administrator to find out which asset types on your system permit content embedding.

To embed the contents of an asset into another asset

1. Log in to the site you want to work with.

2. Find and open the target asset (that is, the asset into which you want to embed the contents of another asset):

   a. Do one of the following:

      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.

      - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

      For more information on searching, see "Finding Assets," on page 82.

b. In the list of results, navigate to the desired asset and click its name.

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

3. In the action bar, click **Edit**.

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

4. Find the source asset (that is, the asset whose contents will be embedded into the target asset). Do one of the following:

   - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
   - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

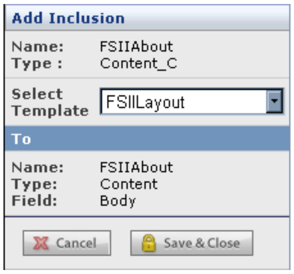
   Content Server displays a list of returned assets above the asset pane.

5. In the list of results, navigate to the desired asset and select its check box.

6. In the “Edit” form, click within the field into which you want to embed the contents of the selected source asset. When FCKEditor loads, enter some text at the desired insertion point. Any text will do; whatever you enter will be replaced by the contents of the asset you are embedding.

7. Highlight the text you have entered and click the field’s **Include** button.

   The “Add Inclusion” pop-up window appears.



8. In the pop-up window, do the following:

   a. (Optional) In the “Select Template” drop-down list, select the template that will be used to display the linked asset. The linked asset’s default template is preselected.

   b. Click **Save & Close** to save the embedded link and close the pop-up window.

   The pop-up window closes and Content Server embeds an inclusion link at the specified insertion point. At render time, the contents of the source asset will be automatically embedded into the target asset at the selected insertion point.

9. In the action bar, click **Save & Close**.

   Content Server displays the target asset in the “Inspect” form, showing your changes.

Sharing Assets with Other Sites

If you are working with an asset that you want to use in more than one site, you can share it so that you do not have to create it more than once and maintain it across multiple sites.

Before you share an asset, consider the following:

- You must have the right permissions to share an asset.
- You can share an asset only to sites that you have access to. If you have access to only one site, the **Sharing** form section is not available to you.
- You cannot share “Page” assets.
- Share an asset only if the content it contains does not have to be unique to the target site. For example, you can share an asset containing your company’s logo, because the same image can be probably be used on all of the company’s sites.

  If the nature of the content dictates the need for a separate, unique version for each site, do not share the asset – instead, create a new asset for each site that requires a unique version of the content.
- Because of the nature of asset sharing, if a shared asset is deleted, it automatically disappears from all of the sites it was shared to.
- If the asset is in a workflow, you and others can change its workflow status only when you are working in the asset’s original site.
- It is good practice to share the asset only when you are ready to publish it; that is, wait to share the asset until it has been approved.
- If you want to share a localized asset to another site, the asset’s locale must be enabled on the target site.

To share an asset to another site

1. Find and open the asset you want to share to another site:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
      - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

      For more information on finding assets, see “Finding Assets,” on page 82.
   b. In the list of results, navigate to the desired asset and click its name.

      Content Server displays the asset in the “Inspect” form.
2. Click **Sharing** in the section selector.
3. In the **Sharing** section, select the site(s) to which you want to share the asset.

4. Click **Share**. A message confirms that the asset is now available in the selected site(s).

Rating Assets for Segments

This procedure shows you how to rate assets for segments. Rating assets for segments determines which assets are shown to the site visitors, based on information (such as age or income) the visitors provide about themselves.

> **Note**
>
> You can rate assets for segments only if Engage is installed. For a complete explanation of segments, ratings, and other Engage functionality, see the *Content Server Advanced Interface User's Guide* or consult your CS administrator.

To rate an asset for one or more segments

1. Find and open the asset you want to rate:

   a. Do one of the following:

      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
      - If you know the asset is assigned to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane.

      For more information on finding assets, see “Finding Assets,” on page 82.

   b. In the list of results, navigate to the desired asset and click its name.

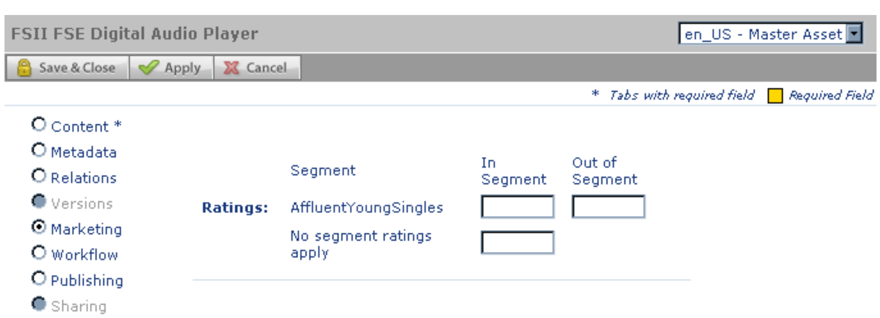
      Content Server displays the asset in the “Inspect” form.

2. In the action bar, click **Edit**.

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

3. Click **Marketing** in the section selector.

   The **Marketing** section lists all the segments that have been created for this site. For example:

4. 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 the *Content Server Advanced Interface User's Guide*.

5. When you are finished, click **Save & Close**.

Content Server displays the asset in the "Inspect" form, showing your changes.

Chapter 8

Approval for Publishing

The goal of using Content Server is to publish content to a web site where site visitors can read and interact with that content. Before an asset can be published, it has to be approved for publishing.

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

- Overview
- Approval Tasks

Overview

Before an asset can be published, it must be **approved** for publishing. Requiring approval is a safeguard against publishing an asset whose dependent assets (parents or children) are not ready to be published. This prevents broken links on the delivery system. You approve assets for one or more **destinations** that the administrator sets up on your site. Having multiple destinations allows for the use of multiple publishing methods, such as Mirror to Server or Export to Disk. (For more information on destinations and available publishing methods, see the *Content Server Advanced Interface User's Guide*.)

Asset approval can be either manual or automatic. You can manually approve assets one at a time from the **Publishing** section of the asset's "Inspect" form. If the asset has dependent assets that need approval, Content Server displays a list of dependent assets which you can then approve in bulk. You cannot, however, perform bulk approval on a group of assets of your own choice; this capability is reserved 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 144.)

Dependencies

Dependencies are conditions that determine whether an asset can be published. An asset dependency exists when there is an association of some kind between assets. For example, a "Product" asset has an association with a "Datasheet" asset. The "Datasheet" asset has an association with three "Image" assets. Two of these images have associations with "Article" assets. This tree hierarchy forms a set of parent/child dependencies among all these assets.

The **approval status** of an asset indicates whether the asset can be safely published; that is, whether any dependency conflicts exist. An asset's approval status is determined by its dependency relationships, which include the approval status of all assets associated with a particular asset, as well as the dependency relationships of those associated assets.

For more information on how Content Server calculates asset dependencies during approval and publishing, see the publishing chapter of the *Content Server Advanced Interface User's Guide*.

Approval States

Because of the dependencies between assets, as well as the nature of the dependencies, approving an asset involves the concept of **approval states**. For example, "held" is an approval state an asset enters when the asset is approved for publishing, but its dependent assets are not. In such case, the asset is then held from publishing until its dependents are approved. See "Approval States," on page 137 for detailed descriptions of the possible approval states an asset can enter.

If an asset enters an approval state that prevents publication, Content Server displays a list of dependent assets that require approval. Once all assets are approved, they can be published.

To learn more about the approval and publishing mechanisms employed by Content Server, see the *Content Server Advanced Interface User's Guide*.

Approval Tasks

This section describes how to approve assets for publishing.

This section describes the following tasks:

- Approving an Asset for Publishing
- Checking an Asset's Approval Status

Approving an Asset for Publishing

The following procedure describes how to manually approve an asset for publishing. Before approving an asset for publishing, you should preview it first.

To manually approve an asset for publishing

1. Log in to the site you want to work with.
2. Find and open the asset you want to approve for publishing:
   - **If the asset is currently assigned to you to work on:**
     a. In the **Tags** tree, click **My Assignments**. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

        Content Server displays a list of assets currently assigned to you to work on.

     b. Navigate to the desired asset and click its name.

        Content Server displays the asset's "Inspect" form.
   - **If the asset is not currently assigned to you to work on:**
     a. Do one of the following:
        - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
        - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

        For more information on finding assets, see "Finding Assets," on page 82.

     b. In the search results list, navigate to the desired asset and click its name.

        Content Server displays the asset in the "Inspect" form.
3. (Optional) To preview the asset before you approve it for publishing, click **Preview** in the action bar.

   Content Server opens a new browser window displaying the asset in its rendered form.
   - If you are satisfied with the way the asset looks, close the preview window and continue to the next step.
   - If you want to make changes to the asset, close the preview window and click **Edit** in the action bar to open the asset's "Edit" form. Make your changes, and click **Save & Close** to save the asset.
4. Click **Publishing** in the section selector.

5. In the **Publishing** section, click **Show** for the destination for which you want to approve the asset.

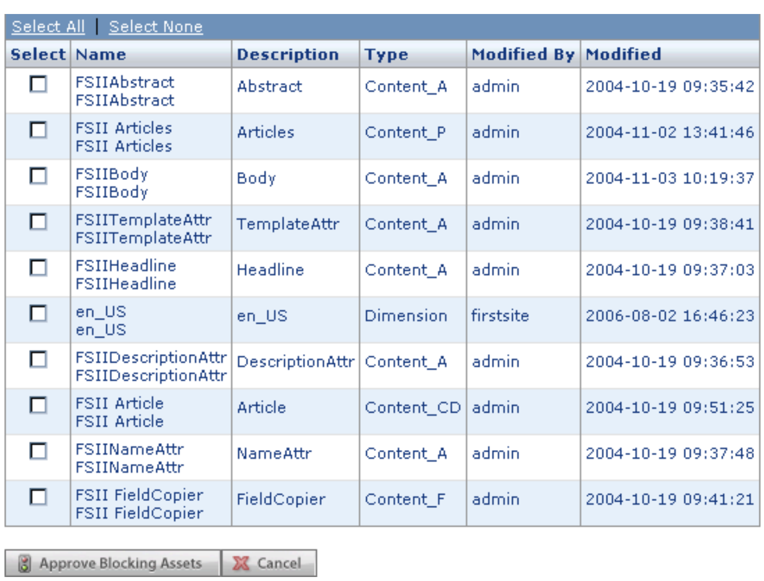
> ### Note
>
> Note the following:
>
> - You can approve an asset for only one destination at a time; repeat this procedure to approve the asset for additional destinations.
> - Consult your administrator to find out where (which destinations) and how (using which publishing method) your content is published on your system.

Content Server displays the asset's details for the selected destination.

6. Click **Approve**. At this point, one of the following happens:

   - If the asset has no dependencies, Content Server displays a message confirming the approval of the asset.
   - If the asset has dependencies that are preventing publication, Content Server notifies you of that fact and displays the **Click here to approve dependencies...** link. Do the following:

     1) Click the link to display a list of the dependent assets.



Select All | Select None

Select	Name	Description	Type	Modified By	Modified
☐	FSIIAbstract FSIIAbstract	Abstract	Content_A	admin	2004-10-19 09:35:42
☐	FSII Articles FSII Articles	Articles	Content_P	admin	2004-11-02 13:41:46
☐	FSIIBody FSIIBody	Body	Content_A	admin	2004-11-03 10:19:37
☐	FSIITemplateAttr FSIITemplateAttr	TemplateAttr	Content_A	admin	2004-10-19 09:38:41
☐	FSIIHeadline FSIIHeadline	Headline	Content_A	admin	2004-10-19 09:37:03
☐	en_US en_US	en_US	Dimension	firstsite	2006-08-02 16:46:23
☐	FSIIDescriptionAttr FSIIDescriptionAttr	DescriptionAttr	Content_A	admin	2004-10-19 09:36:53
☐	FSII Article FSII Article	Article	Content_CD	admin	2004-10-19 09:51:25
☐	FSIINameAttr FSIINameAttr	NameAttr	Content_A	admin	2004-10-19 09:37:48
☐	FSII FieldCopier FSII FieldCopier	FieldCopier	Content_F	admin	2004-10-19 09:41:21

2) At the top of the list, click **Select All** to select all assets in the list.

3) Click **Approve Blocking Assets**.

Content Server approves the dependent assets and calculates their dependencies. If any of the dependent assets have their own dependencies, Content Server displays a list of the dependent assets' dependencies; again, click **Select All**, and then click **Approve Blocking Assets**. Continue this process until all dependencies for all assets are approved.

When all dependencies for the original asset are approved, Content Server displays a message confirming the original asset is approved for publishing to the selected destination.

Checking an Asset's Approval Status

To check an asset's approval status

1. Log in to the site you want to work with.
2. Find and open the asset you want to approve for publishing:
   - **If the asset is currently assigned to you to work on:**
     a) In the **Tags** tree, click **My Assignments**. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

        Content Server displays a list of assets currently assigned to you to work on.

     b) Navigate to the desired asset and click its name.

        Content Server displays the asset's "Inspect" form.
   - **If the asset is not currently assigned to you to work on:**
     a. Do one of the following:
        - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
        - If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

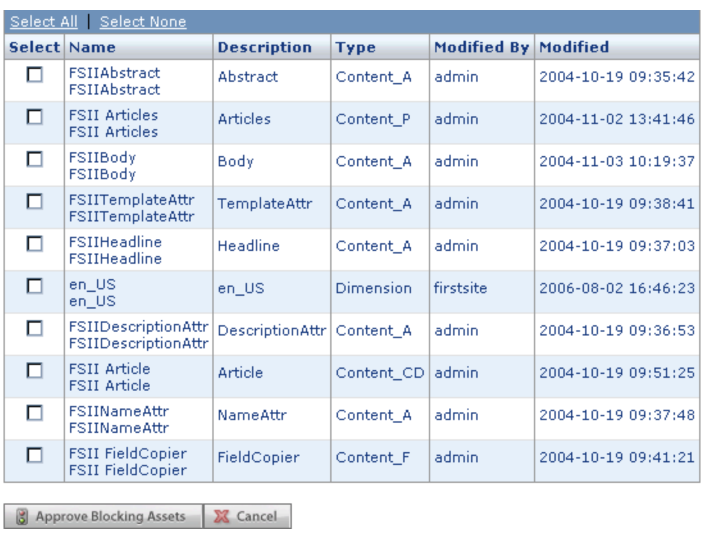
        For more information on finding assets, see "Finding Assets," on page 82.

     b. In the search results list, navigate to the desired asset and click its name.

        Content Server displays the asset in the "Inspect" form.
3. Click **Publishing** in the section selector.
4. In the **Publishing** section, click **Show** next to the destination for which you want to check the asset's approval status. Content Server displays the asset's details for the selected destination.

The form displays the status of the asset for the selected destination. The options available in the form are:

- **Approval State** – describes the asset's present approval state. For more information, see "Approval States," on page 137.
- **Last Published –** denotes when the asset was last published to the selected destination.
- **Publishing Cycle** – denotes the publishing session, if one is running, in which the asset is being published.
- **Approve** button – appears only if the asset has not been approved yet. Approves the asset for publishing to the selected destination. If the asset has dependencies preventing publication, the **Click here to approve dependencies...** link appears when you click **Approve**.
- **Unapprove** button **–** appears only if the asset has already been approved. Removes the asset from the publishing queue for the selected destination. When you use this function, all assets that depend on this asset (that is, the asset's parents) are removed from the publishing queue as well.
- **Click here to approve dependencies...** link – clicking this link displays the asset's dependencies which are preventing the asset's publication:



Select All | Select None

Select	Name	Description	Type	Modified By	Modified
☐	FSIIAbstract FSIIAbstract	Abstract	Content_A	admin	2004-10-19 09:35:42
☐	FSII Articles FSII Articles	Articles	Content_P	admin	2004-11-02 13:41:46
☐	FSIIBody FSIIBody	Body	Content_A	admin	2004-11-03 10:19:37
☐	FSIITemplateAttr FSIITemplateAttr	TemplateAttr	Content_A	admin	2004-10-19 09:38:41
☐	FSIIHeadline FSIIHeadline	Headline	Content_A	admin	2004-10-19 09:37:03
☐	en_US en_US	en_US	Dimension	firstsite	2006-08-02 16:46:23
☐	FSIIDescriptionAttr FSIIDescriptionAttr	DescriptionAttr	Content_A	admin	2004-10-19 09:36:53
☐	FSII Article FSII Article	Article	Content_CD	admin	2004-10-19 09:51:25
☐	FSIINameAttr FSIINameAttr	NameAttr	Content_A	admin	2004-10-19 09:37:48
☐	FSII FieldCopier FSII FieldCopier	FieldCopier	Content_F	admin	2004-10-19 09:41:21

Approve Blocking Assets | Cancel

Click **Select All** and then click **Approve Blocking Assets** to approve the asset's dependencies. If any of the dependent assets have their own dependencies, Content Server displays a list of the dependent assets' dependencies; again, click **Select All**, and then click **Approve Blocking Assets**. Continue this process until all dependencies for all assets are approved.

Approval States

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

State	Meaning
Approved	(Informational) This asset will be published during the next publishing session to this destination, unless the asset, or one of its dependent assets (in Exact dependencies), is edited.
Published	(Informational) An asset with an exact dependency has been published to this destination.
Checked Out	(Action may be required) The asset is checked out under revision tracking. Although approved, it cannot be published until revision tracking relinquishes control in one of the following ways: • Checkin - the asset must be reapproved. • Undo Checkout - the asset remains approved and can be published. • Rollback - the asset must be reapproved.
Changed	(Action required) The asset must be reapproved. Click **Approve** to initiate the approval process.
Held	(Action required) The asset will be held until the dependents are approved. Click the **Click here to approve dependencies...** link to view and approve the dependents.
Needs Approval	(Action required) The asset must be approved. Click **Approve** to initiate the approval process.

Removing Assets from the Publishing Queue

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

      For more information on finding assets, see "Finding Assets," on page 82.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Click **Publishing** in the section selector.

   Content Server displays the **Publishing** section of the asset form.
4. In the form, select the destination for which you want to unapprove the asset.

   Content Server displays the asset's details for the selected destination.
5. Click **Unapprove**.

   Content Server removes the asset from the publishing queue and changes its approval state to "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."

Chapter 9

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
- Managing Your Workload
- Using Workflow Functions

Overview

The following sections describe basic workflow concepts and terminology.

Note

In addition to the functionality described in this chapter, Content Server provides the following workflow functionality through the Advanced interface:

- **Workflow groups** – allow you to manage a defined set of assets in a coordinated manner that allows those assets to reach the end of the workflow process together, prior to publishing.
- **Workflow reports** – allow you to track the progression of assets and user assignments in workflow.

For information on workflow groups and reports, see the *Content Server Advanced Interface User's Guide.*

Workflow and Assets

Assets can (but do not have to) be assigned to a **workflow**. A workflow routes an asset through a series of editorial tasks (states) by assigning the tasks to the appropriate users at the appropriate times. Either specific assets or all assets of a certain type can be assigned to a workflow.

Depending on how your site is configured, assets might be assigned to a workflow either automatically (for example, when you create a new asset) or manually. The workflow system lets Content Server direct and track the assignment of assets to users and specifies what users can do with those assets through permissions.

The flow of the editorial tasks performed on the asset, as well as who is authorized to perform those tasks at each point in the workflow is defined by a **workflow process**. The workflow administrator can define as many workflow processes per asset type as needed.

Note

During workflow, the asset is not electronically transferred from one person to the next. What is transferred is permissions to the asset. The asset itself remains in its original location in the database throughout the workflow process and throughout its lifetime in Content Server.

States and Steps

A workflow process defines a series of **states**. A state is a point in the workflow process that represents the status of the asset at that point, for example, "Ready to Edit" or "Ready for Approval."

States are linked together in a specific order by **steps**. A step is the movement of the asset between states. Because creating workflow steps links workflow states in a specific order, creating steps in a workflow process is what organizes the process. In each step, the asset goes from a start ("from") state to an end ("to") state. When creating the workflow process, the administrator defines the states and links them via the appropriate steps.

Steps and states have names; for example, in the FirstSite II sample site, “Send for Approval” is a step originating from the “Ready to Edit” state and resulting in the “Ready for Approval” state. An asset can move from one state to another via more than one step. For example, an asset that is ready for approval can be rejected because of factual errors or stylistic problems, each type of rejection having its own step.

Assets are assigned to users by role. As an asset progresses through the workflow, each step assigns it to users holding roles authorized to work on the asset in the next state. For each step, there is at least one role authorized to complete work on an asset and allow it to continue moving through the workflow. In certain cases, a user holding the appropriate role can choose between steps; for example, a user holding the Approver role can either approve or reject an asset assigned to him/her for approval.

When you log in to Content Server, the dashboard pane provides a summary of your present workload, from which you can access a list of your assignments. (You can also see this list by selecting the **My Assignments** tag in the **Tags** tree.) When your work on the asset is complete, you use the **Finish Assignment** function to invoke the next step in the workflow; the workflow process then moves the asset to the next state and assigns the asset to the appropriate users. Note that a step can be conditional; that is, certain users or all users can be prevented from taking a step until some condition is met.

Users, Roles, and Participants

A **user** in Content Server is a person who is assigned a Content Server user name which he/she uses to identify him/herself and to log in to the system. What a user can or cannot do is determined by the role (or roles) assigned to that user by the administrator.

A **role** describes and determines the function(s) of a user in a CM site by granting him/her permissions to perform specific functions; in the context of workflow, these permissions are called **function privileges**.

The workflow process grants roles (not individual users) the appropriate function privileges. The function privileges are enforced only when an asset has been assigned to a workflow. Function privileges depend not only on the user’s role, but also on the state of the asset and whether or not the asset has been assigned to the user.

Note

Because function privileges are granted to a user through his/her role(s), they function independently of the access permissions assigned by the administrator at the user level.

For example, a user might not normally have the permission to edit “Content” assets, but he/she can have the function privilege to do so if he/she has the Editor role, is participating in a workflow process for “Content” assets, and the asset he/she wants to edit is in the appropriate workflow state.

Each role required by a particular workflow state in a workflow process is a participating role. Participating roles are chosen for each state in a workflow process by the administrator. Each user whose assigned role(s) match those required by that workflow state is therefore a **participant** for that state in the workflow process and is authorized to take the workflow step leading from that state to the next state.

Unless the administrator decides otherwise, assets placed in workflow are assigned to all available participants for a given role. You can, however, limit which users can work with a particular asset by choosing the desired assignees from among the participants available in each participating role.

An **assignee** is a workflow participant chosen to work on a specific assignment. The ability to choose assignees is granted to specific roles, as defined in the workflow process. Assignees are set when an asset is assigned to a workflow, but can also be changed when an asset is already in a workflow process. When choosing assignees, you select at least one user for each role.

When assignees are set for a given asset in the workflow, only the chosen assignees will see the asset in their assignment lists, and only they will have to complete the assignment before the workflow process changes the state of the asset.

Workflow Assignments

An assignment is an asset that a chosen participant (an assignee) is (or is supposed to be) working on. An asset appears on the participant's assignment list as soon as the asset enters a state for which the participant has a role to fulfill.

A typical workflow design generates an e-mail notification when you are given a workflow assignment. You can see an updated list of your assignments at any time by selecting the **My Assignments** tag in the **Tags** tree.

Assignment Duration

Each workflow state has an associated estimated time to completion (deadline) for an assignment. If the administrator has granted you the appropriate permission, you can override the default estimate for the next assignment.

As the assignment deadline nears, associated assignment actions in the form of e-mail notifications can be triggered as timed events relative to the estimated time to completion. For example:

- You receive a reminder the day before your assignment is due.
- You and the workflow initiator receive a warning the day the assignment is due.
- The initiator receives notification the day after the due date that the assignment has not been completed.

Voting Your Assignments

If you participate in workflow, you have a vote. **Voting** means taking a workflow step that moves the asset from its current state to the next, after you have completed the task required by the current workflow state (such as editing an article) and committed the changes to the CS database (saved the asset), if applicable. You cast your vote by using the **Finish Assignment** function (available in the action bar of the "Inspect" form when the **Workflow** section is selected). If more than one participant with a given role has the assignment, either one, or all of them must vote before the asset moves to the next state, depending on how the workflow was set up by the administrator.

Depending on your role in the workflow process, the **Finish Assignment** function can give you a choice of steps to take; for example, if you are an approver and your current assignment is to either approve an asset for publishing or reject it, you can use the **Finish Assignment** function to invoke either a step that approves the asset for publishing, or a step that rejects it due to factual error, depending on your choice. When you vote, the asset moves to the next workflow state unless the step you chose is in disagreement with the step chosen by other assignees with the same role as you.

If, for some reason, you are unable to complete your assignment, you can **abstain from voting**, as long as yours is not the last (or only) vote for that particular role and/or step. When you abstain, you still have the assignment, but the asset can continue through workflow. If you change your mind, you can reverse your abstention by voting again (using the **Finish Assignment** function), as long as the asset has not already moved to the next state.

Delegating Your Assignments

Another way of handling an assignment is to **delegate** it to another participant holding the same role as you, assuming the asset you are delegating is not already assigned to that person for the current workflow state.

Your function privileges (set by the administrator) determine whether you can delegate your assignments. Also, the administrator can delegate assignments on your and other assignees' behalf, if necessary.

Delegating an assignment can trigger associated **delegate actions** in the form of e-mail notifications. For example:

- The recipient of the new assignment is notified.
- The workflow administrator is notified of the assignment delegation.

Deadlocks

An asset moves from one state to the next when assignees cast their votes (that is, take a step) using the **Finish Assignment** function. When defining the workflow process, the administrator decides whether each step is **all-voting**, that is, whether all assignees must vote (take the step) for the asset to move to the next state. By default, steps are not all-voting, which means that the first assignee to vote in a given workflow state determines the flow of the asset, and the assignments for the remaining assignees for that workflow state are cancelled. If the administrator set the step to be all-voting, the asset is held in its current workflow state until all assignees have voted, at which time the asset moves to the next state.

If there is a choice of steps and each step is all-voting, the potential for a deadlock exists. A deadlock occurs when all of the assignees must vote, and the voting is not unanimous on which step to take. A workflow process typically includes a **deadlock action** to generate e-mail notifications to all assignees, showing the vote tally and advising all assignees to vote again in favor of the majority. Deadlocks cause additional work for all the users involved, and should be avoided whenever possible. They should also be resolved as quickly as possible so that the flow of work is not hindered.

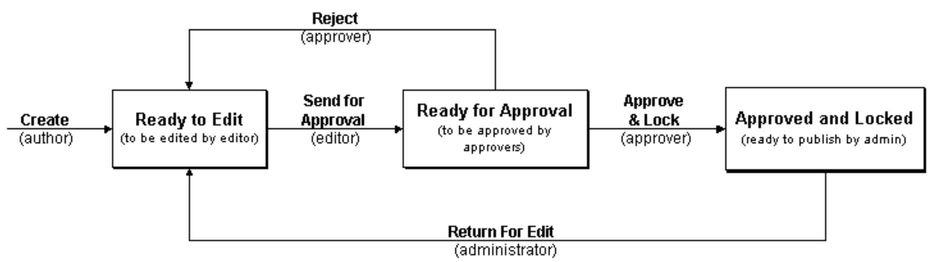
Sample Workflow

The FirstSite II sample site includes six sample workflow processes which guide assets of different types from creation to approval for publishing. The sample workflows are simple, transitioning through three states via five possible steps, but they serve to illustrate how a workflow process works. This section is based on the FSII: Approval for Content sample workflow process included in the FirstSite II sample site.

The FSII: Approval for Content sample workflow process has three roles participating: Author, Editor, and Approver. Each role has only a single participant (your organization will most likely have more complex processes, with several users participating in each role). A participant from any of the four roles can create a new “Content” asset, which automatically assigns it to the FSII: Approval for Content workflow. By creating the asset, workflow is initiated. The asset then moves from author to editor to approver. The approver can either approve or reject the asset. If the approver rejects the asset, it goes back to the editor.

Sample Workflow States and Steps

The FirstSite II sample site includes a sample workflow process called FSII: Approval for Content. The flow of the process is shown in the following diagram:



The steps and states from this workflow process are described in the following table:

Table 5: States and Steps

Asset in State...	Step	Description	Asset Moves to State...
none	Create	A user with the ContentAuthor role creates a “Content” asset, which automatically assigns it to the FSII: Approval for Content workflow.	Ready to Edit
Ready to Edit	Send for Approval	A user with the ContentEditor role receives e-mail notification of the assignment. The editor revises the asset to complete the assignment.	Ready for Approval

Table 5: States and Steps *(continued)*

Asset in State...	Step	Description	Asset Moves to State...
Ready for Approval	Reject	A user with the Approver role receives an e-mail notification of the assignment. The approver completes the assignment by rejecting the asset because of factual errors. The rejection triggers a notice to the editor, who must make some corrections and resubmit the asset for approval.	Ready to Edit
	Approve and Lock	The approver completes the assignments by approving the asset. The asset is flagged in the CS database as "ready to publish" for selected destinations.	Approved and Locked
Approved and Locked	Return for Edit	The workflow administrator reviews the asset and determines the content needs to be updated with additional information. The workflow administrator then uses the **Finish Assignment** function to return the asset to the editor for revision.	Ready to Edit

Sample Workflow Scenario

This section describes the typical flow of a "Content" asset through the FSII: Approval for Content workflow process.

1. The author creates the asset and writes the content

The process starts when Conrad the author creates the "Content" asset. Since the "Content" asset type in the FirstSite II sample site is configured to automatically place each new "Content" asset in workflow, Conrad's asset is automatically placed into the FSII: Approval for Content workflow process. Conrad writes the content and saves the "Content" asset.

When Conrad saves the asset, the workflow process automatically changes the state of the asset to "Ready to Edit," assigns it to Connie the editor, and sends Connie an e-mail notice about the new assignment.

2. The editor edits the asset and sends it for approval

Connie the editor logs in, checks her assignment list, and opens the "Content" asset for editing. She reads the content and fixes some punctuation. When done, Connie saves her changes and uses the **Finish Assignment** function to send the asset on for approval.

The workflow process changes the state of the asset to "Ready for Approval," assigns it to Napoleon the approver, and sends Napoleon an e-mail notice about his new assignment.

3. The approver approves the asset

Napoleon the approver is already logged in, so when he receives his e-mail, he runs the **My Assignments** tag to display his assignment list. Napoleon opens the newly assigned "Content" asset and examines it. It looks fine, so he uses the **Finish Assignment** function. Because Napoleon can either approve or reject the asset, the workflow process presents both options to him.

> **Note**
>
> If two or more users with the same role have the same assignment in a given workflow state, the first vote cast determines the next state for the asset.
>
> For example, if the FSII: Approval for Content workflow process included two approver users who both had a vote when approving the asset for publishing, a rejection by either of them would cancel the assignment of the other person and return the asset to the editor.
>
> Your administrator might set up a workflow in which a disagreement like this causes a deadlock (see "Deadlocks," on page 143) that has to be resolved before the asset is returned to the previous state or moved to the next one.

The workflow process changes the state of the asset to "Approved and Locked," and flags it in the database as "ready to publish." The asset will be published to the online site during the next publishing session.

4. The workflow administrator returns the asset to the editor

When new information becomes available, it has to be added to the asset. When that happens, the workflow administrator uses the **Finish Assignment** function to return the asset to Connie for review and updating.

The workflow process automatically changes the state of the asset to "Ready to Edit," assigns it to Connie the editor, and sends Connie an e-mail notice about the new assignment.

When Connie finishes her assignment, the updated asset will need to be re-approved before it can be re-published to the online site.

Managing Your Workload

When completing your workflow assignments, you can use the following functionality to manage your workload:

- Viewing Your Assignments – see a list of your current assignments and their status
- Using Workflow Functions – see a list of the assignments you have given to other users, and the status of those assignments

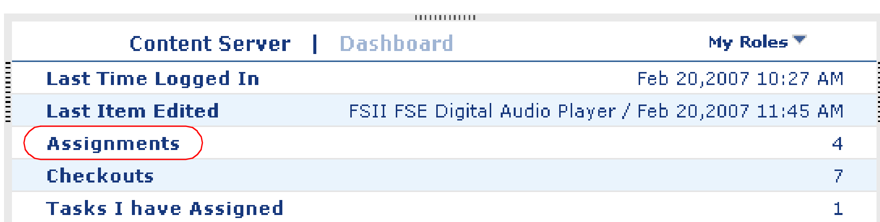
Viewing Your Assignments

You can access your assignment list by running the **My Assignments** tag, or using the dashboard pane.

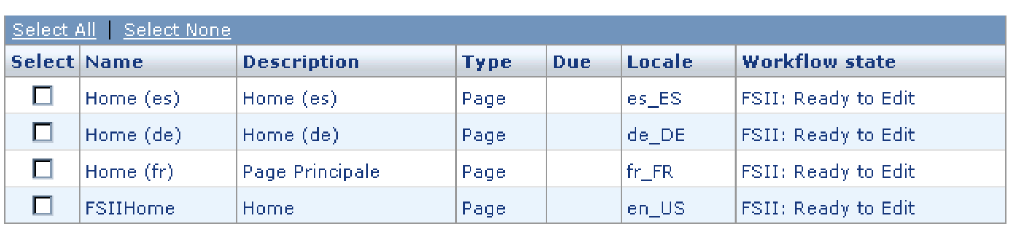
> **Note**
>
> As you work in the interface, new assignments might be given to you, and you may complete some of your current assignments, causing your assignment list to change. Check your assignment list periodically to make sure you stay up to date with your assignments.

To view a list of your workflow assignments

1. Log in to the site you want to work with.
2. Do one of the following:
   - In the **Tags** tree, click **My Assignments**. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)
   - If the dashboard pane is displayed, click **Assignments**.



Content Server displays a list of your pending workflow assignments.



Select All | Select None

Select	Name	Description	Type	Due	Locale	Workflow state
☐	Home (es)	Home (es)	Page		es_ES	FSII: Ready to Edit
☐	Home (de)	Home (de)	Page		de_DE	FSII: Ready to Edit
☐	Home (fr)	Page Principale	Page		fr_FR	FSII: Ready to Edit
☐	FSIIHome	Home	Page		en_US	FSII: Ready to Edit

3. Click an asset's name to open it in the "Inspect" form.

Using Workflow Functions

The following subsections describe the workflow functions you use in the Dashboard interface. These functions are available in the action bar of the “Inspect” form when you select the **Workflow** section of the form. Depending on your function privileges, not all of the described functions might be available to you.

This section describes the following topics:

- Assigning an Asset to a Workflow
- Setting a Process Deadline
- Setting an Assignment Deadline
- Finishing Your Assignments
- Delegating Your Assignments
- Abstaining from Voting
- Resolving Deadlocks
- Removing an Asset from Workflow
- Viewing an Asset's Participant (Assignee) List
- Setting Workflow Participants
- Examining the Workflow Progress of an Asset

Assigning an Asset to a Workflow

An asset can be assigned to a workflow either automatically or manually.

Automatic workflow assignment is set up by the administrator for selected asset types. When you create a new asset of such type, the asset is automatically placed in the workflow process assigned to that asset type. Consult your administrator to find out which asset types are set up for automatic workflow assignment.

Manual workflow assignment is available to users with appropriate permissions, assuming a workflow process is assigned to the selected asset type.

To manually assign an asset to a workflow

> **Note**
>
> Before an asset can be assigned to a workflow, the administrator must first assign one or more workflow processes to the asset type of the asset in question; otherwise, the option to assign the asset to a workflow is not available. Consult your administrator to find out which workflow processes are available to which asset types on your system.

1. Log in to the site you want to work with.
2. Find and open the asset you want to place in workflow:
    a. Do one of the following:
        - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.

- If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

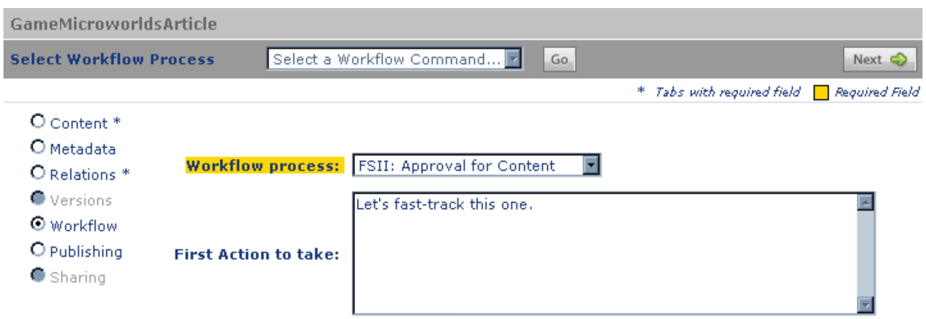
  For more information on searching, see “Finding Assets,” on page 82.

b. In the search results list, navigate to the desired asset and click its name.

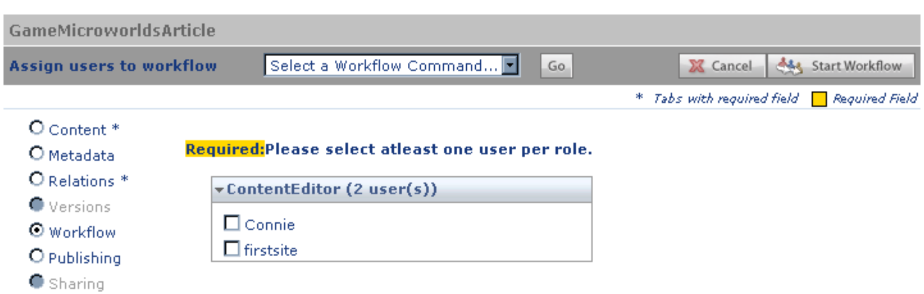
   Content Server displays the asset in the “Inspect” form.

3. Click **Workflow** in the section selector.
4. In the action bar, choose **Select Workflow** from the “Select a Workflow Command...” drop-down list and click **Go**.

   Content Server displays the “Select Workflow Process” form:

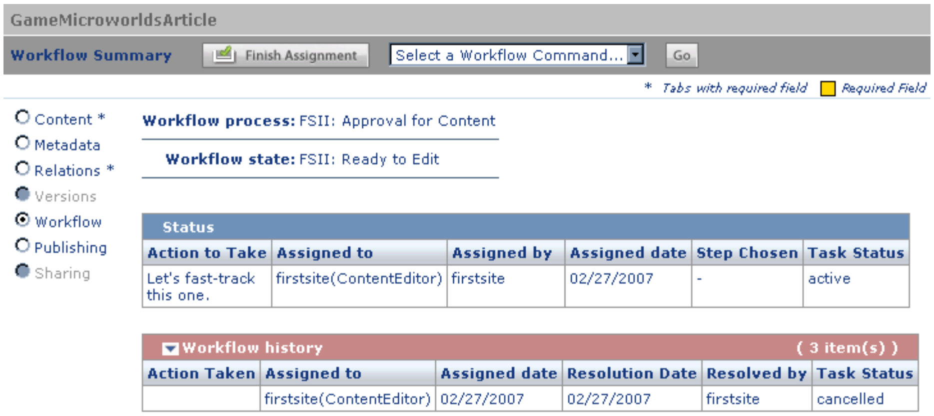


5. Select a workflow process from the “Workflow Process” drop-down list.
6. (Optional) In the **First Action to Take** field, enter brief instructions for the person receiving the assignment.
7. Click **Next**.
8. (Optional) If the administrator enabled the selection of assignees for this assignment, Content Server displays the “Assign Users to Workflow” screen:



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

Content Server displays the asset's workflow summary, showing the new workflow assignment in the "Status" list.



At this point, the asset is in workflow; participants with roles required by the next state typically receive e-mail notifications of their assignments.

Setting a Process Deadline

A process deadline is the overall time allotted for an asset to pass through a workflow process. By default, no process deadline is set. This deadline is independent of the assignment deadline described later in this section; that is, the total of the individual assignment deadlines does not necessarily add up to a process deadline.

Note

Deadlines are informational only — the system does not impose any sort of penalty or issue error messages when a deadline is exceeded.

Before you can set a process deadline, the workflow administrator must first have done the following:

- Allowed a process deadline to be set for this workflow process.
- Assigned you a workflow administrator role for the workflow process, or otherwise provided you with the right function privileges.

The option to set a process deadline is available only if both of the above conditions are met. Contact your administrator to find out if you have the appropriate privileges and whether setting a process deadline is enabled for the workflow process in question.

To set a process deadline

1. Log in to the site you want to work with.
2. Find and open the asset for which you wantr to set a process deadline:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.

- If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree in the navigation pane. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

For more information on searching, see "Finding Assets," on page 82.

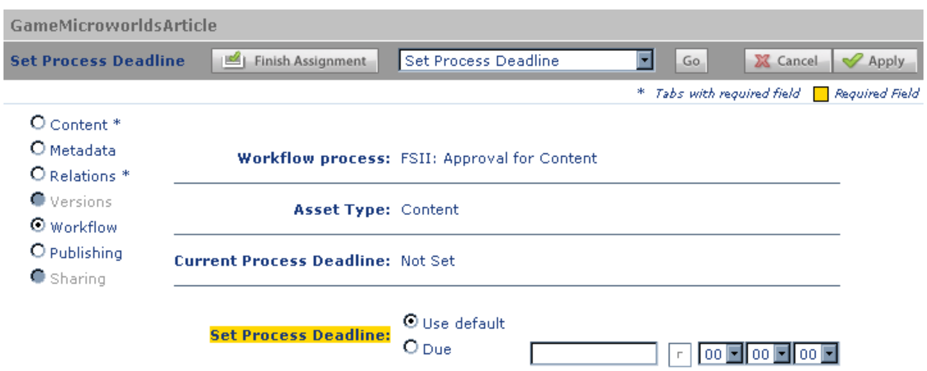
b. In the search results list, navigate to the desired asset and click its name.

Content Server displays the asset in the "Inspect" form.

3. Click **Workflow** in the section selector.
4. In the action bar, choose **Set Process Deadline** from the "Select a Workflow Command..." drop-down list, and click **Go**.

> **Note**
>
> If you do not see the **Set Process Deadline** function in the drop-down list, stop here. The function was not enabled by the administrator or you do not have the right permissions to access it.

Content Server displays the "Set Process Deadline" form:



5. 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 **Apply**.

Content Server redisplays the asset's workflow summary.

Setting an Assignment Deadline

An assignment deadline is the time allotted to the assignee to complete an assignment as an asset advances through workflow. This deadline is independent of the process deadline described earlier in this section; that is, the total of the individual assignment deadlines does not necessarily add up to a process deadline.

> **Note**
>
> Deadlines are informational only — the system does not impose any sort of penalty or issue error messages when a deadline is exceeded.

Before you can set an assignment deadline, the workflow administrator must first have done the following:

- Allowed an assignment deadline to be set for this workflow state.
- Assigned you a workflow administrator role for the workflow process, or otherwise provided you with the right function privileges.

The option to set the assignment deadline is available only if both of these conditions are met. Contact your administrator to find out if you have the appropriate privileges and whether an assignment deadline is allowed for the workflow state in question.

To set an assignment deadline

> **Note**
>
> This procedure describes how to set an assignment deadline from an asset's "Inspect" form. You can also set an assignment deadline when you complete an assignment for an asset. In such case, the "Finish My Assignment" form will include a **Set Assignment Deadline** field.

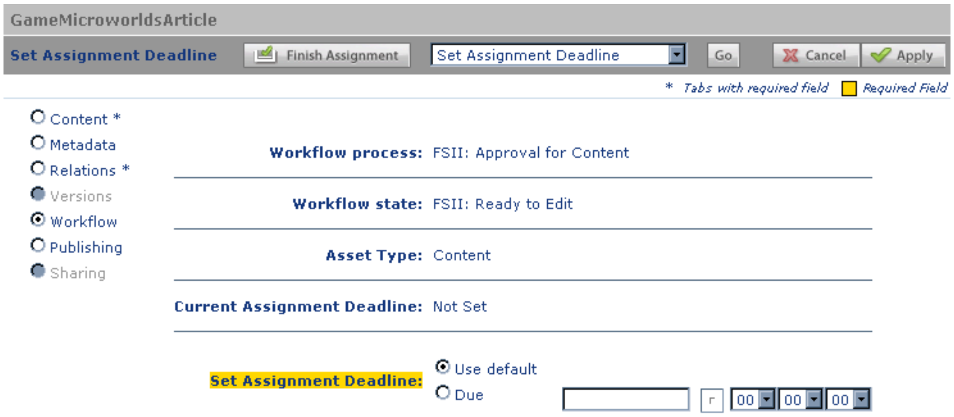
1. Log in to the site you want to work with.
2. Find and open the asset for which you want to set an assignment deadline:
   a. Do one of the following:
      - In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
      - If you previously added the asset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

      For more information on searching, see "Finding Assets," on page 82.
   b. In the search results list, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Click **Workflow** in the section selector.
4. In the action bar, choose **Set Assignment Deadline** from the "Select a Workflow Command..." drop-down list, and click **Go**.

   > **Note**
   >
   > If you do not see the **Set Assignment Deadline** function in the drop-down list, stop here. The function was not enabled by the administrator or you do not have the right permissions to access it.

Content Server displays the "Set Assignment Deadline" form:



5. Enter a date in the prescribed format. The default assignment deadline is set by the administrator in the workflow state definition. For example, in the FSII: Approval for Content sample workflow, each state has a duration of one year from the current date and time.
6. Click **Apply**.

   Content Server redisplays the asset's workflow summary.

Finishing Your Assignments

After you complete your work for an assignment, you need to notify the system that you are finished so the asset can continue to move through the workflow.

To finish your assignment for an asset

1. Log in to the site you want to work with.
2. Open the asset in the "Inspect" form by doing one of the following:
   - **If you are currently working on the asset in the "Edit" form:**
     a. Review your work and click **Save & Close** to save the asset.

        Content Server displays the asset in the "Inspect" form.

     b. Proceed to step 3 of this procedure.
   - **If you have already completed your work and saved the asset:**
     a. In the **Tags** tree, select **My Assignments**. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

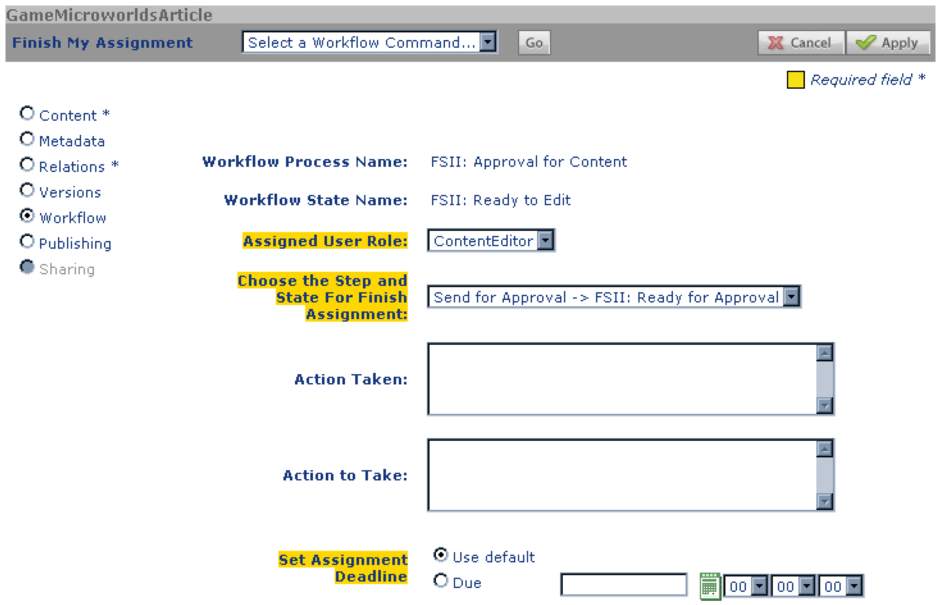
        Content Server displays a list of assets currently assigned to you to work on.

     b. Navigate to the desired asset and click its name.

        Content Server displays the asset in the "Inspect" form.

     c. Proceed to step 3 of this procedure.
3. Click **Workflow** in the section selector.
4. In the action bar, click **Finish Assignment**.

Content Server displays the “Finish My Assignment” form:



5. Complete the form as follows:

> **Note**
>
> You can cancel this procedure at any time by clicking **Cancel** in the action bar.

a. (Optional) If you hold multiple participant roles in the workflow process, select the role for which you are finishing this assignment.

b. Select the next step for the asset.

c. (Optional) In the **Action Taken** field, enter a short description of the work you completed on the asset.

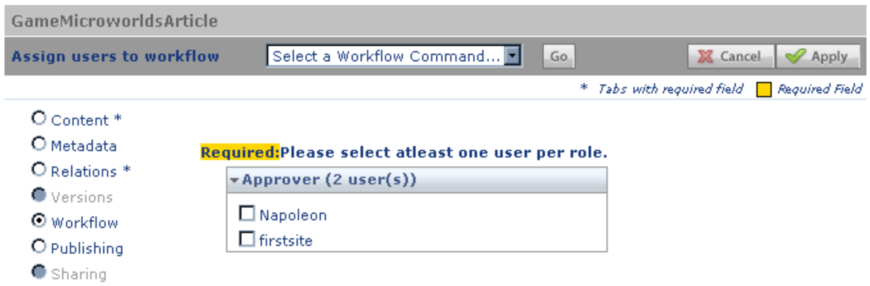
d. (Optional) In the **Action to Take** field, enter a short suggestion for the next person who will work with the asset.

e. (Optional) If setting the assignment deadline is enabled for the next step you chose to take, the **Set Assignment Deadline** field appears in the “Finish Assignment...” form.

If you want to override the time allotted for the next assignment, use the **Set Assignment Deadline** field to enter a date in the prescribed format. If you do not enter a specific date, the assignment is due within the time determined by the next workflow state.

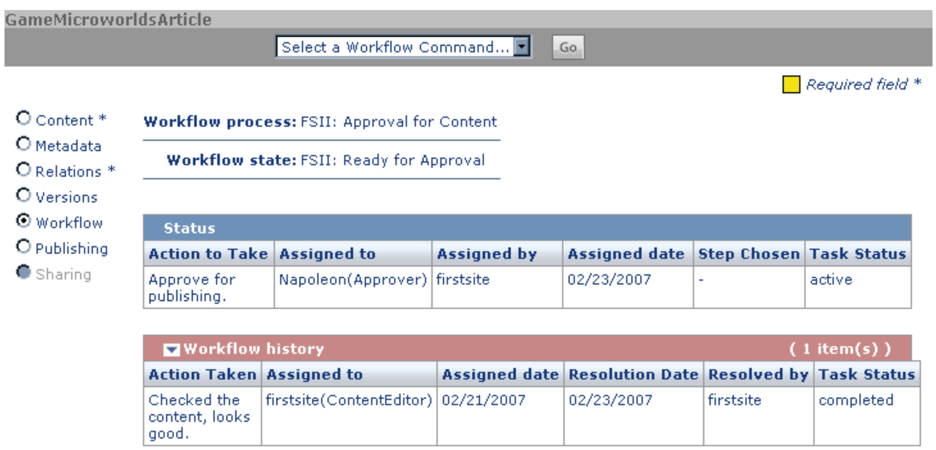
> **Note**
>
> This feature appears only if enabled by the workflow administrator.
>
> To set the assignment deadline, you must hold an administrative role in the workflow process or otherwise have the right privileges. For more information, see “Setting an Assignment Deadline,” on page 151.

6. Click **Apply**.
7. (Optional) If the administrator has set up the workflow process in a way that requires you to choose assignees for the next step when you finish your assignment, Content Server displays the “Assign Users to Workflow” form:



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

Content Server redisplays the asset’s workflow summary, showing the changes. The action taken is visible in the “Workflow History” list. The action to take is visible in the “Status” field.



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

- **Assign From a List of Participants —** when you (or another user with the appropriate privileges) assign an asset to a workflow, you have the option to decide which participants in each role get the assignment when the asset enters a workflow state requiring those roles. This is the default mechanism for moving an asset through a workflow.
- **Choose Assignees When Step is Taken** — this option, described in step 7, is similar to the “Assign From a List of Participants” option described earlier, but instead of predetermining at the beginning of the workflow who will get the assignment during which workflow state(s), you choose assignees for the next workflow state in real-time each time you take a step.

- **Retain "From" State Assignees** — you keep the assignment as the asset moves to the next state; this allows you to continue working on the asset in that state. You probably know why it is appropriate for you to keep the assignment, but if you do not, ask your CS or workflow administrator.
- **Assign To Everyone —** the asset is assigned to all users holding roles participating in the current workflow process.
- **No Assignments —** as the asset moves to the next state, it remains in the workflow so that function privileges defined for the workflow process are enforced. However, the asset is assigned to no one and participant roles alone (through their assigned function privileges) determine who can work on the asset, and how.

Delegating Your Assignments

As you review your assignment list, you might find that you will be unable to complete certain assignments. For example, you might notice that an assignment's due date falls during your scheduled vacation time. In such situations, you can delegate your assignment to another user who has the same role as you, assuming that the user does not already have an identical assignment for the asset; that is, if both you and another user have the Editor role, you cannot delegate the asset to the other user if he/she already has the asset assigned through the Editor role. (The asset can still be assigned to the user through a different role or another workflow process.)

To delegate an assignment

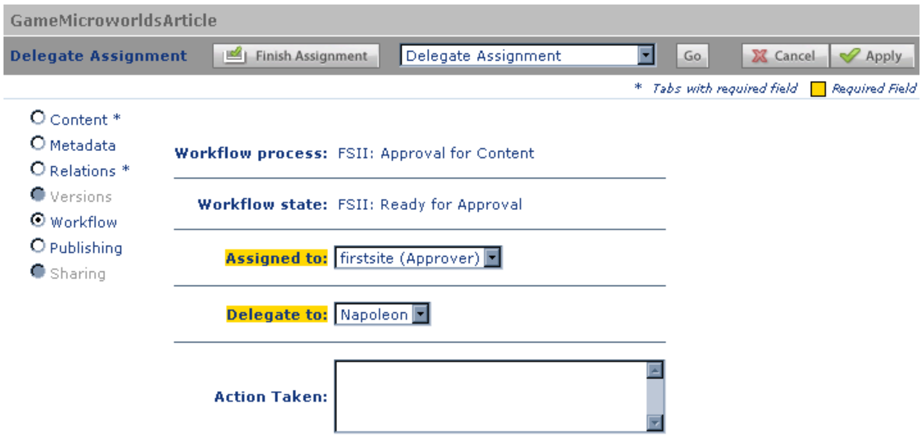
1. Log in to the site you want to work with.
2. Find and open the asset for which you want to delegate your assignment:
   a. (Optional) If the **Tags** tree in the navigation pane is collapsed, click the **Tags** bar to expand it.
   b. In the **Tags** tree, click **My Assignments**.

      Content Server displays a list of assets assigned to you to work on.
   c. Navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Select **Workflow** in the section selector.
4. In the action bar, select **Delegate Assignment** from the "Select a Workflow Command..." drop-down list, and click **Go**.

> **Note**
>
> If you do not see the **Delegate Assignment** function in the drop-down list, stop here. You do not have the right permissions to access the function or there are no other users in your role to whom you can delegate your assignment.

Content Server displays the "Delegate Workflow Assignment" screen.



5. (Optional) If you hold multiple participant roles in the workflow process, use the "Assigned to" drop-down list to select the role for which you are delegating this assignment.
6. Select the user to whom you want to delegate the assignment. Optionally, enter a comment about your action.
7. Click **Apply**.

   Content Server displays the asset's workflow summary. The delegation is denoted in the "Workflow History" list, and the new assignee is displayed in the "Status" field. This action also triggers a notification e-mail to the new assignee, assuming your site is configured to do so.

Abstaining from Voting

Sometimes, you are unable to deal with a particular assignment: your workload is too heavy, or perhaps you have been miscast in your role. In such situations, you can abstain from voting (that is, waive your participation), as long as yours is not the last (or only) vote for that particular role and/or step. When you abstain, you still have the assignment, but the asset can continue through workflow.

To abstain from voting on an assignment

1. Log in to the site you want to work with.
2. Find and open the asset for which you want to abstain from voting:
   a. (Optional) If the **Tags** tree in the navigation pane is collapsed, click the **Tags** bar to expand it.
   b. In the **Tags** tree, click **My Assignments**.

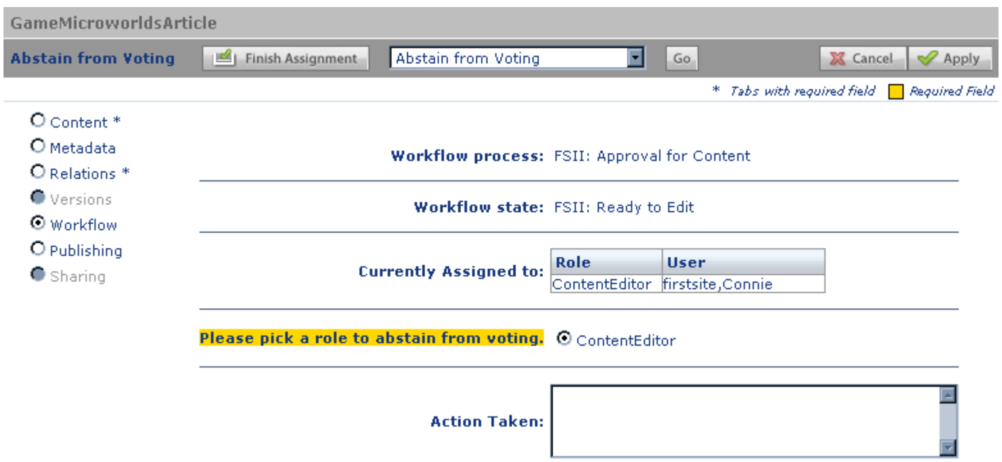
      Content Server displays a list of assets assigned to you to work on.
   c. Navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
3. Select **Workflow** in the section selector.

4. In the action bar, select **Abstain From Voting** from the “Select a Workflow Command...” drop-down list, and click **Go**.

> **Note**
>
> If you do not see the **Abstain From Voting** function in the drop-down list, stop here. You do not have the right permissions to access it or you are the only (or the only remaining) participant in your current role. In this case, you must find some other means of dealing with your assignment.

Content Server displays the “Abstain From Voting” form:



5. (Optional) If you hold multiple participant roles in the workflow process, select the role for which you are abstaining from voting on this assignment.
6. Enter a brief explanation for your abstention and click **Apply**.

   Content Server displays the asset’s workflow summary. The abstention is denoted in the “Workflow History” list. Keep in mind that abstaining does not cancel your assignment.

Resolving Deadlocks

A deadlock can occur when there is a choice of steps to move the asset to the next state, and each step requires all assignees to vote. If the vote is not unanimous in favor of a single step, there is a deadlock.

Frequently, resolving deadlocks involves offline communication and negotiation among assignees to achieve consensus; as such, deadlocks cause additional work for everyone involved and should be avoided whenever possible. If a deadlock occurs, it should be resolved as quickly as possible so that the flow of work suffers minimal delay.

To resolve a deadlock, certain participants must change their votes to achieve unanimity. If you receive an e-mail notification that your vote is the one causing the deadlock, you must vote again to break the deadlock.

To resolve a deadlock, do one of the following:

- Use the **Finish Assignment** function to vote again on your assignment.

- In some cases, you can also resolve the deadlock by changing your vote to an abstention, which clears the way for the asset to move to the next workflow state (see “Abstaining from Voting,” on page 157).

Removing an Asset from Workflow

You can remove an asset from workflow assuming you have the permissions to do so. When you remove an asset from workflow, all assignments for the asset are cancelled.

To remove an asset from workflow

1. Log in to the site you want to work with.
2. Find the asset you want to remove from workflow:
   - If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

     Content Server displays a list of assets currently assigned to you to work on.
   - If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Go**.

     Content Server displays a list of assets matching the criteria you specified.

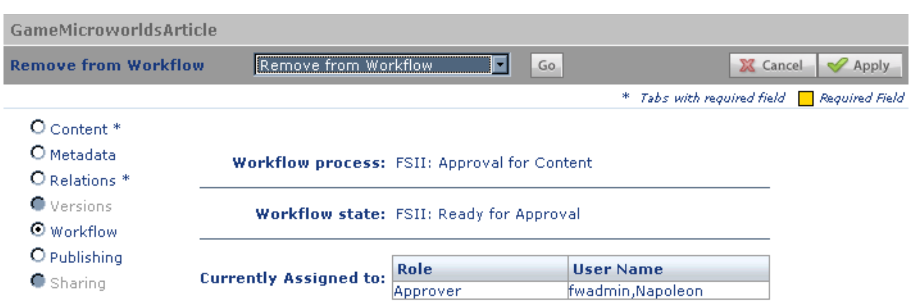
     For more information on searching, see “Finding Assets,” on page 82.
3. In the list of assets, navigate to the desired asset and click its name.

   Content Server displays the asset in the “Inspect” form.
4. Click **Workflow** in the section selector.
5. In the action bar, choose **Remove from Workflow** from the “Select a Workflow Command...” drop-down list, and click **Go**.

   Note

   If you do not see the **Remove from Workflow** function in the drop-down list, stop here. You do not have the right permissions to access the function. Contact your CS administrator if you have questions about your permissions.

   Content Server displays the “Remove from Workflow” form:



6. If you are sure you want to remove the asset from workflow, click **Apply**. (Otherwise, click **Cancel**.)

   Content Server redisplays the asset’s workflow summary, denoting the removal. All assignments for the asset are automatically cancelled.

Viewing an Asset's Participant (Assignee) List

To examine an asset's participant (assignee) list

1. Log in to the site you want to work with.
2. Find the asset whose participant list you want to view:
   - If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

     Content Server displays a list of assets currently assigned to you to work on.
   - If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Go**.

     Content Server displays a list of assets matching the criteria you specified.

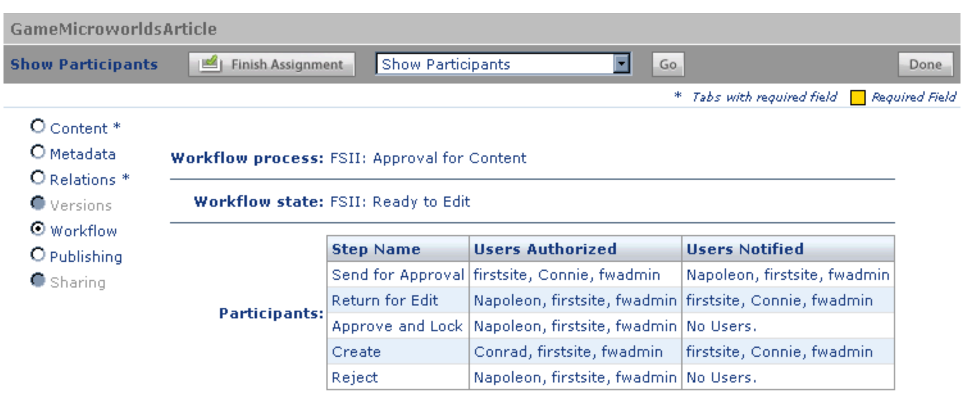
     For more information on searching, see "Finding Assets," on page 82.
3. In the list of assets, navigate to the desired asset and click its name.

   Content Server displays the asset in the "Inspect" form.
4. Select **Workflow** in the section selector.
5. In the action bar, select **Show Participants** from the "Select a Workflow Command..." drop-down list, and click **Go**.

   Note

   If you do not see the **Show Participants** function in the drop-down list, stop here. The administrator has not enabled the function or you do not have the right permissions to access it.

   Content Server displays the "Show Participants" summary for the asset:



   For each step in the workflow process, the "Show Participants" summary displays the following:
   - The authorized users – those who are authorized to take the next step using the **Finish Assignment** function when they hold the assignment for the asset.
   - The notified users – those who will get the next assignment for the asset.
6. When you are finished viewing the list, click **Done** in the action bar to return to the asset's workflow summary.

Setting Workflow Participants

Once you have placed an asset in a workflow and chosen the assignees for each role in the workflow process, you might find that you forgot to include a certain user as an assignee for a particular role. Or perhaps you realized that you gave the assignment to a certain user by mistake. In such cases, you can modify the list of participants for an asset while the asset is in workflow.

To set workflow participants

1. Log in to the site you want to work with.
2. Find and open the asset for which you want to set participants:
   - If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

     Content Server displays a list of assets currently assigned to you to work on.
   - If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Go**.

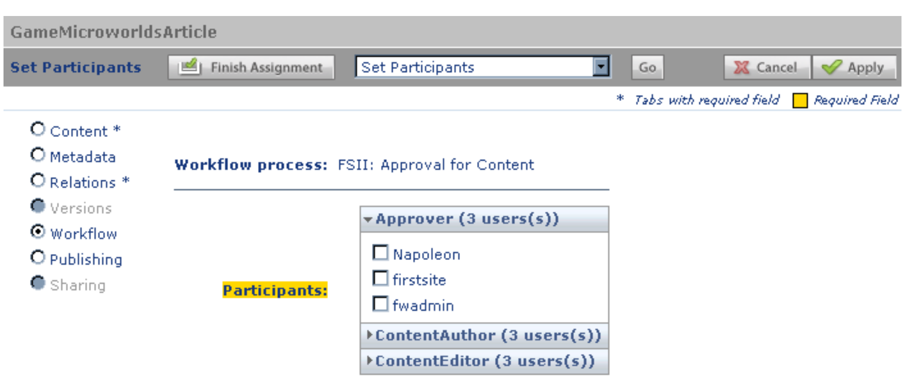
     Content Server displays a list of assets matching the criteria you specified.

     For more information on searching, see “Finding Assets,” on page 82.
3. In the list of assets, navigate to the desired asset and click its name.

   Content Server displays the asset in the “Inspect” form.
4. Select **Workflow** in the section selector.
5. In the action bar, select **Set Participants** from the “Select a Workflow Command...” drop-down list, and click **Go**.

   > **Note**
   >
   > If you do not see the **Set Participants** function in the drop-down list, stop here. The administrator has not enabled the function or you do not have the right permissions to access it.

   Content Server displays the “Set Participants” form:

   Each participant you select in this form becomes an assignee in the respective role(s) for this asset.

6. Choose the desired assignees for this assignment by selecting the check boxes next to their user names in each of the role lists. To expand a role list, click on the right arrow near the left edge of the list's title bar.
7. When you have selected the desired assignees, click **Apply**.

   Content Server displays the asset's workflow summary, denoting the newly selected assignees.

> **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 been reached yet.

Examining the Workflow Progress of an Asset

To examine the workflow progress of an asset

1. Log in to the site you want to work with.
2. Find and open the asset whose workflow progress you want to see:
   - If the asset is currently assigned to you, select **My Assignments** in the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

     Content Server displays a list of assets currently assigned to you to work on.
   - If the asset is not currently assigned to you, enter search criteria identifying the asset into the **Search** field in the top bar, and click **Go**.

     Content Server displays a list of assets matching the criteria you specified.

     For more information on searching, see "Finding Assets," on page 82.
3. In the list of assets, navigate to the desired asset and click its name.

   Content Server displays the asset in the "Inspect" form.
4. Select **Workflow** in the section selector. Content Server displays the asset's workflow summary:

Workflow state: FSII: Ready to Edit

Status

Action to Take	Assigned to	Assigned by	Assigned date	Step Chosen	Task Status
No comment	fwadmin(ContentEditor)	fwadmin	02/28/2007	-	active
No comment	Connie(ContentEditor)	fwadmin	02/28/2007	-	active

Workflow history (6 item(s))

Action Taken	Assigned to	Assigned date	Resolution Date	Resolved by	Task Status
Read through, looks good now.	firstsite(Approver)	02/28/2007	02/28/2007	firstsite	completed
Clarified some of the paragraphs.	Connie(ContentEditor)	02/28/2007	02/28/2007	Connie	completed
No comment	firstsite(ContentEditor)	02/28/2007	02/28/2007	Connie	cancelled
Read over.	Napoleon(Approver)	02/28/2007	02/28/2007	Napoleon	completed
I m on vacation until Tuesday. Please take a look at this in my absence.	firstsite(Approver)	02/28/2007	02/28/2007	firstsite	delegated
Read through, looks good.	firstsite(ContentEditor)	02/27/2007	02/28/2007	firstsite	completed

The workflow summary contains the following information:

- The **Workflow state** field indicates where the asset currently is in the workflow process.
- The “Status” list shows to whom the asset is currently assigned, and the status of each assignment. Each row in the list represents a single assignment. Items are ordered with the most recent assignment at the top of the list.
- The “Workflow history” list shows the assignments completed on the asset so far, and the result of each assignment. Each row in the list represents a single assignment. Items are ordered with the most recently completed assignment at the top of the list.

The following table defines all of the columns in the “Status” and “Workflow history” lists.

Table 6: Workflow summary list columns

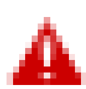
Column	Definition
Assigned To	The user name(s) of the assignee(s) for each assignment. Note that the user’s role appears in parentheses following the user name.
Assigned By	The user name of the assignee who finished working with the asset and assigned it to the next participant. In the “Workflow history” list, the very first entry in this column (at the bottom of the list) shows the user name of the person who assigned the asset to the workflow process.
Assigned Date	The date and time the asset was assigned to the user.
Action to Take	Instructions from the user who assigned the asset, assuming that person entered instructions in the “Finish Assignment” form when they finished their assignment (see page 153). “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 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.

Table 6: Workflow summary list columns *(continued)*

Column	Definition
Task Status	The status of the assignment. Possible values are as follows: • Abstain - the assignee has abstained from voting. • Active - the asset is currently assigned to someone. • Cancelled - the first vote moved the asset to the next state, so the assignment has been canceled for the other assignees, or the asset has been removed from workflow. • Completed - the assignee has completed the step. • Delegated - the assignment has been delegated to another user in the same role. • Queued - the asset has multiple assignees for the current state, the next step is all-voting, and not everyone has voted yet. (Also appears if the asset is deadlocked.)

Chapter 10

Revision Tracking

Revision tracking is a configurable feature and must be enabled by the CS administrator for the asset types on your sites. Revision tracking allows you to track and control the changes made to your assets.

With revision tracking, you can:

- Enforce that only one person at a time can edit or delete an asset.
- Keep track of past versions of an asset and who created them.
- Restore (roll back) an asset to a previous version.

This chapter describes revision tracking and the procedures used to track assets.

It contains the following sections:

Note

In the FirstSite II sample site, revision tracking is not enabled by default.

Contact your administrator if you have any questions or concerns about revision tracking as it applies to you.

Overview

Revision tracking allows you to check out, or lock, assets. When you check out an asset, no one else can edit or delete it. When you are finished working with the asset, you check it back in. The asset is then again available for modification by other users. An asset that is checked out to you, however, can still be viewed and searched for by other users, as well as retrieved by queries or collections.

When revision tracking is enabled, you control access to an asset by checking it out and back in. You can either check assets out and back in manually, or let Content Server handle the process automatically.

Manual Checkout and Checkin

When manual checkout is enabled, the following commands control access to assets:

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

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

  An asset that is checked out cannot be approved for publishing until it is checked in.
- **Undo Checkout**. If you check out an asset and then decide that you do not want to save the changes you have made to it, cancel or “undo” the checkout. In this case, the asset is simply unlocked and no new version is saved.
- **Check in**. You check in assets that you have checked out. After the asset is checked in, others can work with it, and if the asset is assigned to you in a workflow, you can finish your assignment.

  When you check in an asset that you have checked out, a record is made of the checkin, and a copy of the last saved version of the asset is preserved (the number of versions kept is set by the administrator).

  Another option is to check in the asset so that you have an archived version but to keep it checked out. This option enables you to store a version but keeps the asset available to you alone.

Automatic Checkout and Checkin

If you try to edit, delete, or assign a workflow process to an asset that is not already checked out, CS checks it out to you automatically. When you save the edited asset, CS checks it back in automatically and saves the new version. (When you manually check out an asset, edit it, and then save it, the new version is not saved until you manually check the asset back in.) Therefore, if the situation requires it, you can choose to bypass the step of manually checking out and checking in an asset and rely on the automatic revision tracking feature instead.

When to Use Automatic Checkout

Be sure that you rely on automatic checkout only when it is appropriate to do so. For example, if you are going to make one simple change to an asset, you can use automatic checkout. However, if you are making extensive revisions, you should not use automatic checkout for the following reasons:

- The volume of revisions 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 & Close**. Therefore, if you make several changes to an asset—saving and inspecting each change separately—CS checks in a version of the asset at each save. Depending on the number of versions CS is configured by the administrator to store, you might overwrite older versions that you wanted to keep with the automatically checked-in versions.

Releasing Locked Assets

Because automatic checkout is in effect when revision tracking is enabled, you might accidentally check out an asset while you work in Content Server's interface. This locks the asset and prevents other users from working with it. To make sure that you are not stopping other people from working with assets that you have inadvertently checked out, review the assets checked out to you by viewing your "My Checkouts" list and check in (or, if you do not want to commit your changes to the database, undo the checkout of) any assets that you do not need.

Functions That Use Automatic Checkout and Checkin

The following table describes asset management functions that check assets out or in automatically:

Command	Effect on Revision Control
Create	As soon as you open a "Create New *Asset Type*" form, the asset is checked out to you and a SYSTEM version is stored. This version has no content. When you save the asset, another (second) version is stored.
Edit	Checks out the asset and prohibits other users from editing or deleting it.
Save & Close	Checks in the asset, but only if it was checked out automatically.
Copy	Checks out a new copy of the asset. The source asset is not checked out during the copy operation. The new copy behaves as if you created a new asset as described above in the "Create" function column. The only difference is that there is more data included in the copied version. The copied asset is displayed in an "Edit" form. When the asset is saved, a second version of the asset is created.
Delete	Checks out the asset. When the user confirms the deletion, CS checks the asset back in.
Rollback	Clicking **Rollback** checks out the asset, then immediately checks it back in.

Rollback and Revision History

When you check in an asset that you have checked out, CS stores a new version of the asset and adds it to a list of previous versions (assuming the administrator allowed the storage of multiple versions). You can later restore the asset to one of those previous versions and you can examine the asset's revision history.

- **Rollback** means restoring the asset to a previous version. When you have an asset checked out, you can roll it back to any previous version. Rollback restores the contents of the asset, but does not reset its status (created, edited, received, and so forth) as of the previous version, nor does it affect workflow status. If the asset is part of a workflow, anyone who has the appropriate permissions can restore it to a previous version.
- **Revision History**. You or any user can list and examine the revision history of an asset. The revision history also shows who, if anyone, currently has the asset checked out. You can tell whether a version was created by an automatic or manual checkout by looking at the comment section of the revision history. 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.

Versions created through automatic checkout.

Rollback

Select	Versions	Date	User	Comments
○	5	2007-02-22 21:11:43	firstsite	Version created by Edit
○	4	2007-02-22 20:00:11	firstsite	Version created by Rollback
○	3	2007-02-22 19:59:51	firstsite	Fixed troublesome phrasing.
○	2	2007-02-22 19:57:11	firstsite	Fixed punctuation.
○	1	2007-02-22 19:26:38	SYSTEM	

Versions created through manual checkout.

Checking Out Assets

This section shows you how to check out an asset.

To check out an asset

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

      For more information on finding assets, see “Finding Assets,” on page 82.

   b. In the search results list, navigate to the desired asset and click its name.

   Content Server displays the asset in the “Inspect” form.
3. In the action bar, click **Check Out**.

Note

Note the following:

- If you do not see the **Check Out** button in the asset’s “Inspect” form, revision tracking for that asset type is not enabled on your site.
- If the asset is already checked out to another user, the **Check Out** button is replaced by a message denoting such fact:

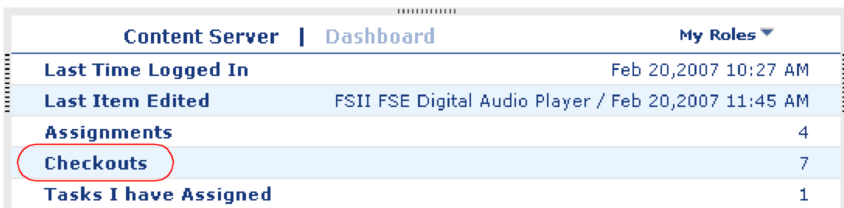
Content Server checks the asset out to you and displays a confirmation message in the action bar:

Examining Your Checkouts

To view a list of assets currently checked out to you, perform the following steps:

To view a list of assets currently checked out to you

1. Log in to the site you want to work with.
2. Do one of the following:
   - In the navigation pane, select **My Checkouts** from the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)
   - If the dashboard pane is displayed, click **Checkouts**.



   Content Server displays a list of assets currently checked out to you.
3. (Optional) If you want to open an asset, click its name in the list.

   Content Server displays the asset in the "Inspect" form.

Undoing a Checkout

This section shows you how to undo the checkout of an asset.

To undo the checkout of an asset

1. Log in to the site you want to work with.
2. Find the asset for which you want to undo the checkout and open it:
   a. In the navigation pane, select **My Checkouts** from the **Tags** tree. (If the **Tags** tree is collapsed, click the **Tags** bar to expand it.)

      Content Server displays a list of assets presently checked out to you.
   b. In the list of assets, navigate to the desired asset and click its name.

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

   Content Server undoes the checkout of the asset and redisplays the asset in the "Inspect" form.

Checking In Assets

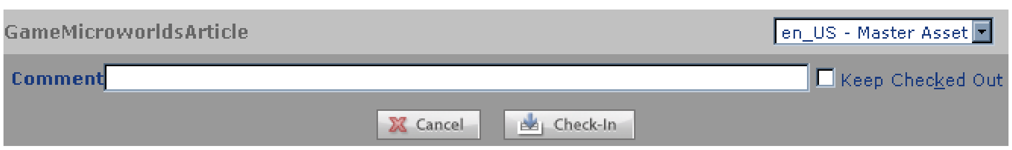
To check in an asset

1. Log in to the site you want to work with.
2. (Optional) If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.
3. In the **Tags** tree, select **My Checkouts**.

   Content Server displays a list of assets presently checked out to you.
4. Click the name of the asset you want to check back in.

   Content Server displays the asset in the “Inspect” form.
5. In the action bar, click **Check In**.

   The action bar displays the following:



6. (Optional) In the **Comment** field, enter comments or instructions that pertain to the version that you are checking in. The comments you enter here are displayed in the asset’s revision history.
7. (Optional) If you want to back up the asset but need to continue working on it, select the **Keep Checked Out** box.
8. Click **Check In**.

   Content Server checks the asset in to the database and redisplays the “Inspect” form.

Examining Revision History

To examine an asset’s revision history

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

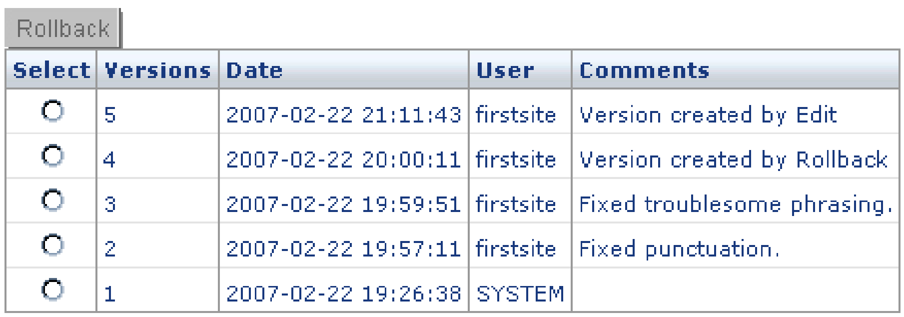
     For more information on finding assets, see “Finding Assets,” on page 82.
   - **b.** In the search results list, navigate to the desired asset and click its name.

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

3. Switch to the **Versions** section of the form.

> **Note**
>
> If the **Versions** section in the section selector is unavailable (greyed out), stop here. Revision tracking is not enabled for the asset type, or you do not have the permissions to view the **Versions** section of the form. If you have questions about revision tracking or your permissions, contact your CS administrator.

Content Server displays the asset's revision history:


Rollback

Select	Versions	Date	User	Comments
○	5	2007-02-22 21:11:43	firstsite	Version created by Edit
○	4	2007-02-22 20:00:11	firstsite	Version created by Rollback
○	3	2007-02-22 19:59:51	firstsite	Fixed troublesome phrasing.
○	2	2007-02-22 19:57:11	firstsite	Fixed punctuation.
○	1	2007-02-22 19:26:38	SYSTEM	

Reverting to a Previous Version (Rollback)

This section shows you how to roll an asset back to a previous version.

To roll back an asset

1. Log in to the site you want to work with.

2. Find the asset you want to roll back to a previous version and open it:

a. Do one of the following:

- In the **Search** field in the top bar, enter search criteria identifying the asset and click **Go**.
- If you previously added the asset to a tag, select the tag that contains the asset in the **Tags** tree. (If the **Tags** tree is collapsed, expand it by clicking the **Tags** bar.)

For more information on finding assets, see "Finding Assets," on page 82.

b. In the search results list, navigate to the desired asset and click its name.

Content Server displays the asset in the "Inspect" form.

3. Switch to the **Versions** section of the form.

> **Note**
>
> If the **Versions** section in the section selector is unavailable (greyed out), stop here. Revision tracking is not enabled for the asset type, or you do not have the permissions to view the **Versions** section of the form. If you have questions about revision tracking or your permissions, contact your CS administrator.

Content Server displays the asset's revision history:

Rollback

Select	Versions	Date	User	Comments
○	5	2007-02-22 21:11:43	firstsite	Version created by Edit
○	4	2007-02-22 20:00:11	firstsite	Version created by Rollback
○	3	2007-02-22 19:59:51	firstsite	Fixed troublesome phrasing.
○	2	2007-02-22 19:57:11	firstsite	Fixed punctuation.
○	1	2007-02-22 19:26:38	SYSTEM	

Note

If the asset is already checked out to another user, you cannot roll it back to a previous version. In such cases, Content Server displays a message informing you of this situation. To roll the asset back, wait until the user working on it finishes his/her work and checks the asset back in.

4. In the **Select** column, select the version of the asset you want to roll back to.
5. Click **Rollback**.

   Content Server rolls the asset back to the version you selected and redisplays the "Inspect" form.

Note

Note that rolling back an asset creates another version of it. Versions created by the rollback function are marked as such in the **Comments** column.

Appendices

This part contains the following appendix:

- Appendix A, "The Flex Asset Model"

Appendix A

The Flex Asset Model

As a content provider, you do not need to understand all of the details of the flex asset model. The purpose of this appendix is to help you develop a general understanding of this data model and how it relates to you as a content provider.

This appendix contains the following section:

Overview of the Flex Asset Model

As mentioned in Chapter 1, “Overview,” Content Server developers use two asset data models to create asset types and define how asset data is stored in the Content Server database: the basic asset model and the flex asset model.

The flex asset model is more complex than the basic asset model. Unlike basic assets, where the information for one instance of an asset is stored in one row of a database table, the information for one instance of a flex asset is stored in multiple database tables.

Whereas basic asset types are standalone asset types, flex asset types are composed of families of asset types. The members of a flex family are:

- flex attribute type (required)
- flex asset type (required)
- flex definition (required)
- flex parent (required)
- flex parent definition (required)
- flex filter type (optional)

The members of a flex family form an asset inheritance tree, where child assets inherit various attributes from their parents.

As a content provider, you will not directly work with all of the members of the flex family. In fact, you will mainly be working with flex assets, which are the key members of flex families (all of the other members of a flex family contribute to the flex asset in some way). If you have the appropriate permissions, you may also be responsible for creating new flex attributes, which are characteristics of flex assets.

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