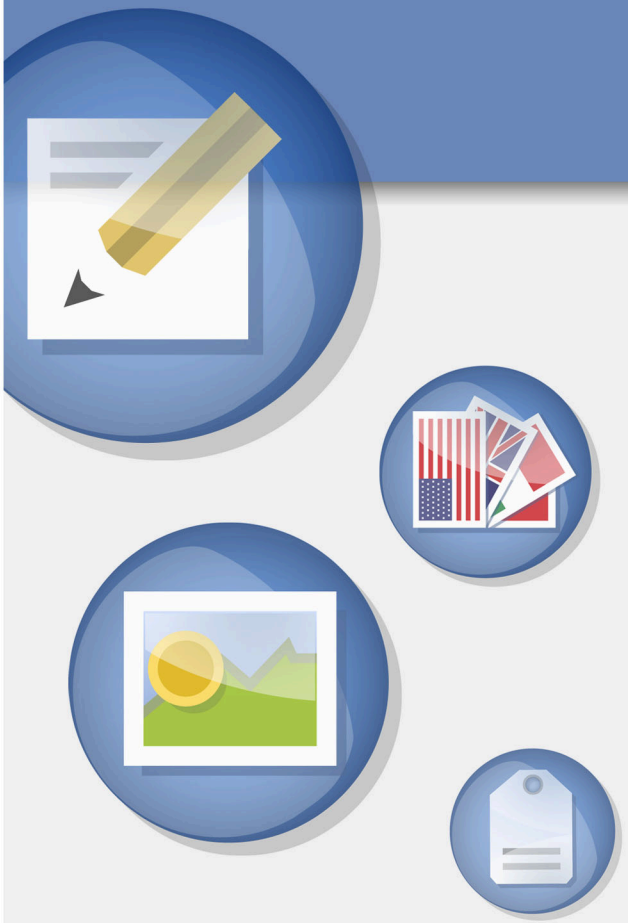
FatWire | Content Server 7

Version 7.0.1



Portal Interface User's Guide

Document Revision Date: Dec. 14, 2007

FatWire® SOFTWARE

Content Server 7.0.1 Portal Interface User’s Guide
Document Revision Date: Dec. 14, 2007
Product Version: 7.0.1

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About This Guide

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

Who Should Use This Guide

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

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

How This Guide Is Organized

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

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

Part 1: Introduction

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

Part 2: Working in the Portal Interface

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

Part 3: Using Engage

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

Part 4: Appendices

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

Other Helpful Information

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

Figures and Diagrams

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

Typographic Conventions

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

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

Related Publications

The FatWire library includes publications written for Content Server developers, administrators, and users. 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 Content Server documentation website is password-protected; you will need to obtain a password from FatWire Technical Support. For Technical Support contact information, visit the following URL:

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

Other publications, such as white papers, provide information about Content Server feature sets 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

This chapter provides an overview of Content Server's Portal interface.

This chapter contains the following sections:

Introduction to Portals

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

Unlike a standard web page, in which content is fixed in place and not user-modifiable, the portal presents your work to the end audience as discrete panels called "display portlets," such as the ones shown in Figure 1. The portlets can be resized, moved, and closed, which allows the user to arrange and customize the content in the portal according to his/her individual viewing preferences.

Each display portlet has its own business theme. In Figure 1, display portlet 1 is dedicated to ads, portlet 2 to documents, and portlet 3 to jobs.

Figure 1: Sample portal

Note

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

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

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

Introduction to the Portal Interface

The Content Server (CS) software suite is a high-performance, large-scale content management and delivery system for website and portal management. Content Server has three main user interfaces: the Advanced interface, the Dash interface, and the Portal interface. The interfaces give you similar functionality, but each presents it differently.

Content Server's Portal interface is specially designed for the business user, to help you function efficiently as a content provider. The Portal interface displays your tasks and objects within portlets in a workspace area. You do not need to know HTML or any other markup language to use this interface, and you are not responsible for formatting the content you provide. Therefore, your attention remains focused on your area of expertise—the content itself.

The Portal interface provides tools that facilitate the progression of your content from creation to publication. Using the Portal interface, you can participate in workflow, the process by which content moves from person to person and is ultimately approved for delivery to the portal. You can also use the revision tracking tools to audit the changes in content.

From the Portal Interface to the Display Portal

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

When you populate a content-entry form—for example, Spark Contact in Figure 2— and save the content, Content Server stores the content in its content management database (step 1 in Figure 2). When you approve the asset for publication, an authorized user publishes the asset by copying the asset to the delivery system, where a duplicate database accepts the asset (step 2 in Figure 2). Finally, when the asset is ready for delivery to the portal, its content is drawn from the database by code, formatted by the code, laid out by the code (step 3 in Figure 2) and delivered to the portal by code (step 4 in Figure 3).

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

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

Content-entry forms offer their users major advantages:

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

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

Because a content-entry form is a standard interface to the variety of databases 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 an Oracle database) the switch is transparent to users.

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

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

- Guesswork is minimized.

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

- Reusability and consistency are maximized.

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

Figure 2: Content in the content-entry form

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

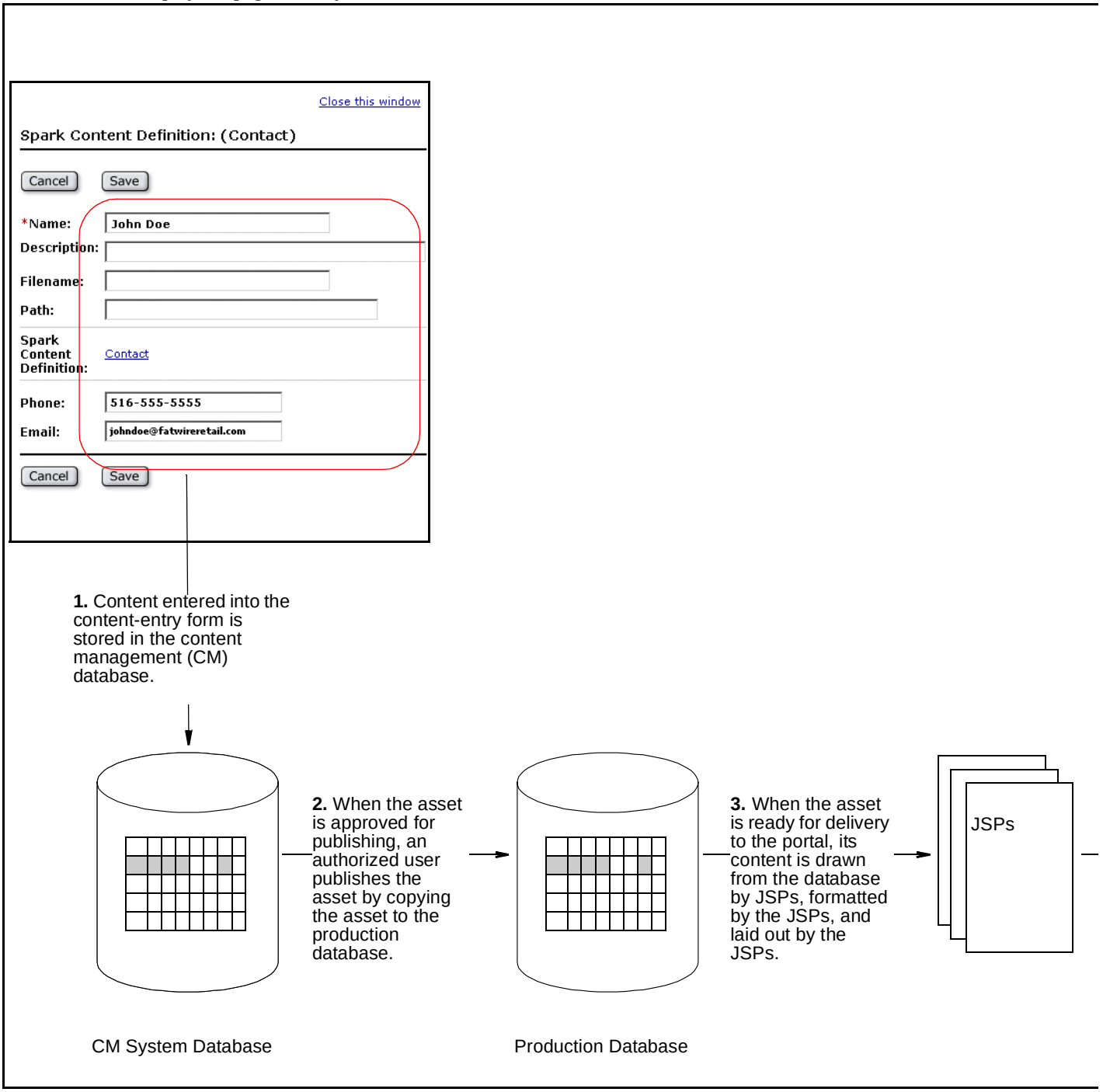
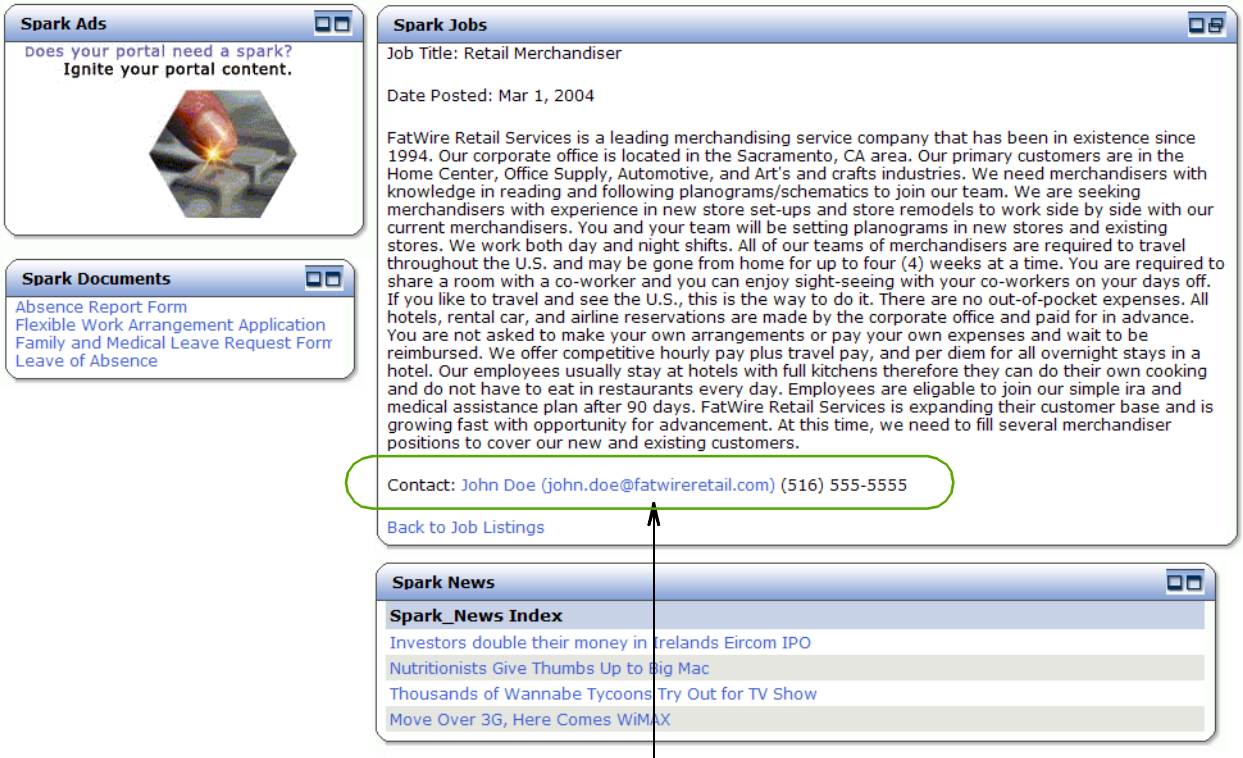


Figure 3: Display portal

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



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

Basic Content Management Concepts

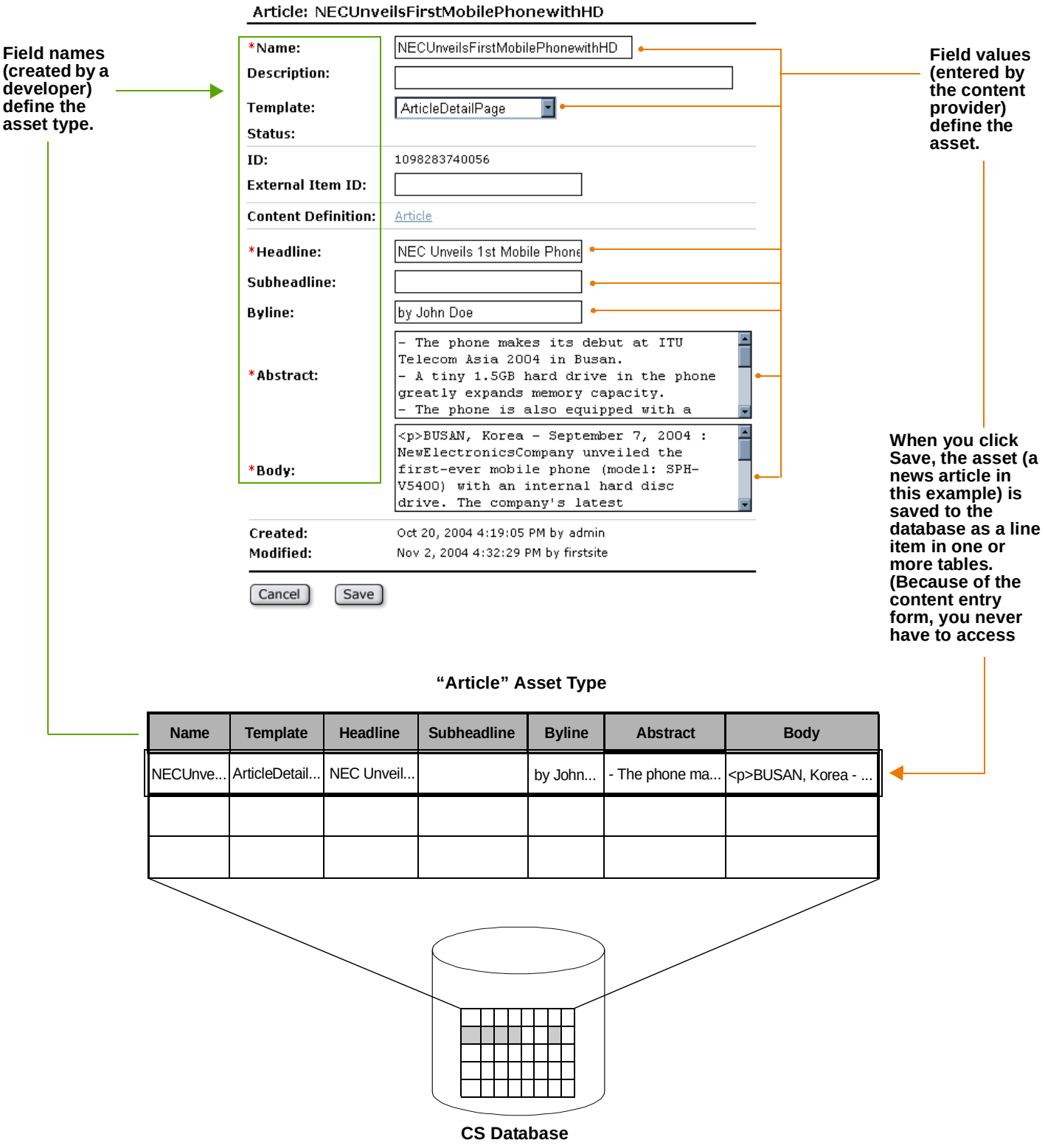
This section explains how Content Server defines and treats content. It explains terms such as “assets,” and “asset types,” which are used throughout this guide. Content: Asset Types and Assets

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 2, on page 21. The form is given a name suggesting the type of content you will be providing. That name is the name of the asset type.

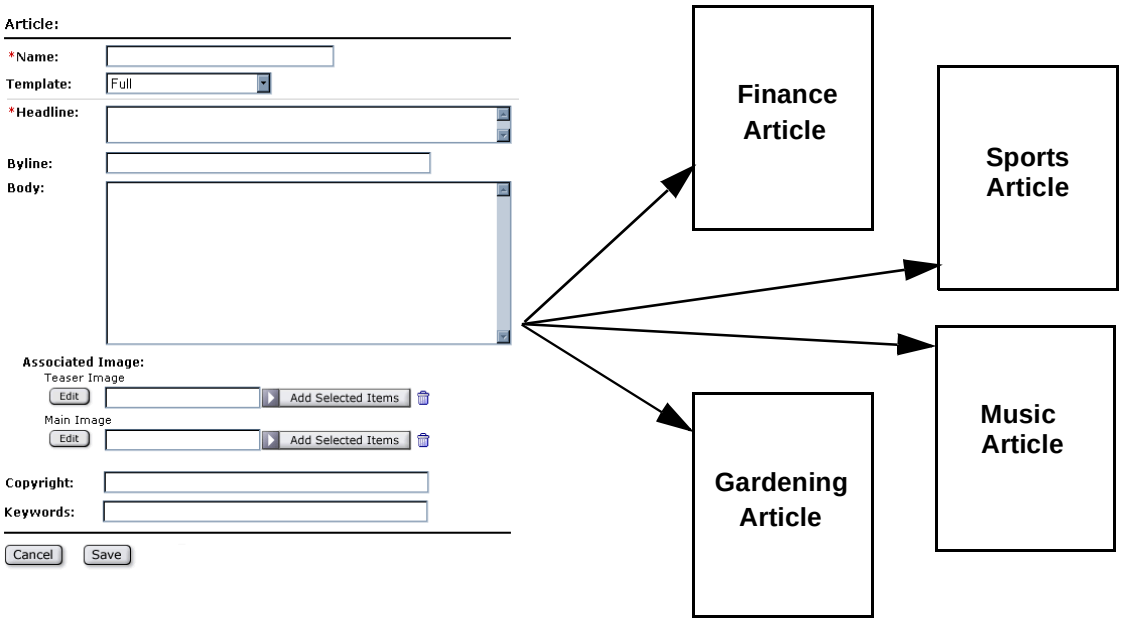
The content you are expected to provide is defined by the set of field names which make up the form and prompt you for the content. By populating the fields and saving your entries, you create an object called an “asset” in the CS database. That asset is content, which you can edit or delete, pass through a workflow, and publish. Figure 4 illustrates the concept of an asset type and an asset, and shows how an article asset is related to the “Article” asset type.

Figure 4: The relation between an asset and its asset type

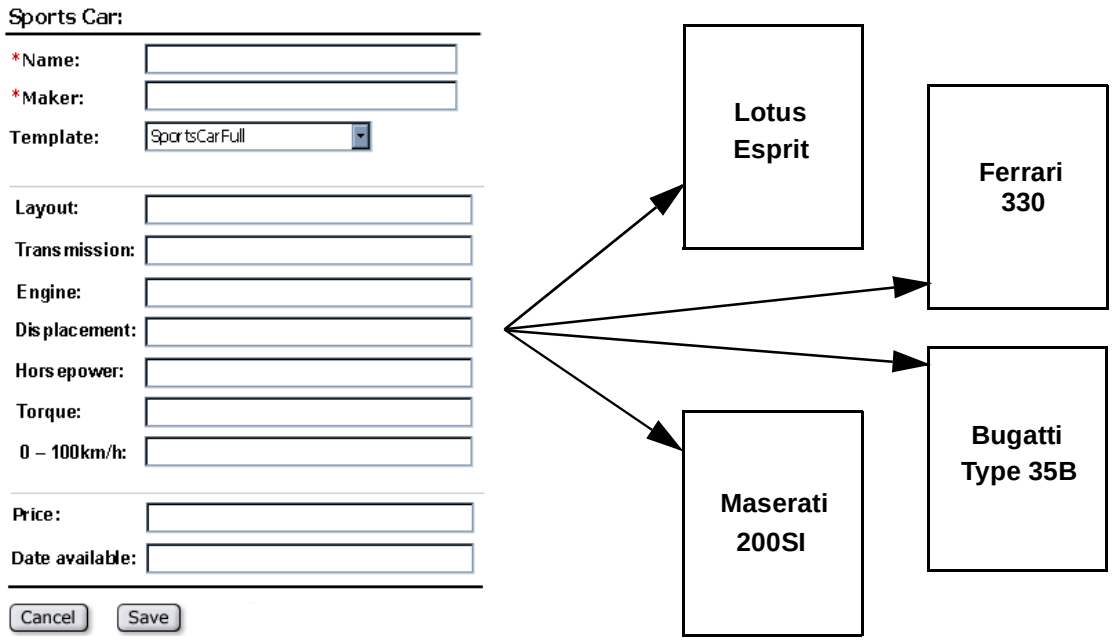


An asset type is reusable, allowing you to create many unique assets from a single content entry form. Each asset is an instance of its asset type.

In our example in Figure 4, 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

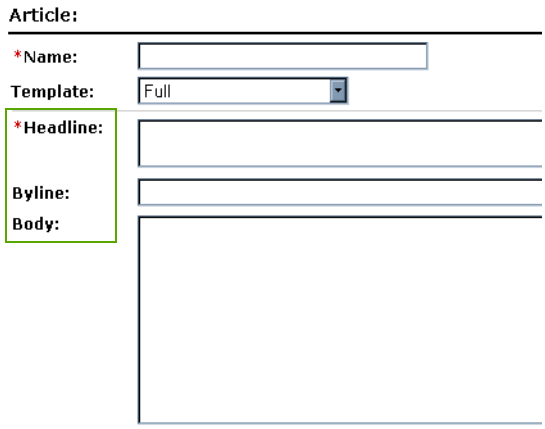
As a content provider, you are likely to manage two kinds of assets: **structured content** assets and **document** assets. The difference is that a structured content asset requires you to enter prescribed pieces of content directly into the Content Server interface, whereas a document asset requires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

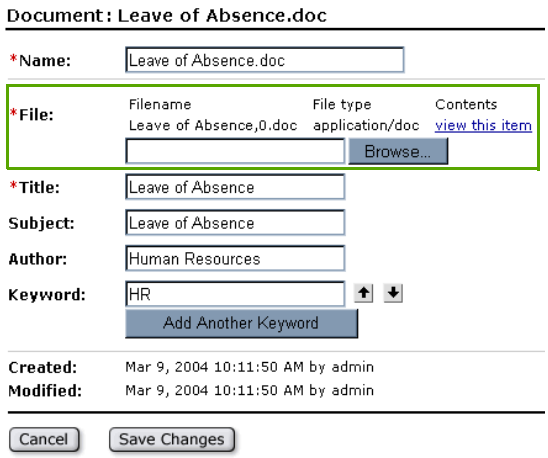
Structured Content Asset



- **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. 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.

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

Document Asset



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 translations of your content.

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

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

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

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

Design Assets

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

Design assets are created by developers for your use. Your access to design assets depends on which design assets were created and on the permissions granted to you by your CS administrator.

The following list describes the design assets you can use (given the appropriate permissions).

- **“Page” assets** are “containers” that reference the assets constituting a page (or a portion of a page) in the online site; they provide the structure and organization for the displayed content. As a content provider, your responsibility includes associating the content you want to appear on a particular page of the online site with the appropriate “Page” asset.

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

- **“Template” assets** create the look and feel of the web site. As a content provider, you assign “Template” assets to structured content assets to apply specific formatting to your content. Each “Template” asset formats assets of a specific type. Consult your site developers for instructions on how to work with the “Template” assets available to you.
- **“Link” assets** are used to embed external page URLs within structured content assets. You create a “Link” asset and store the external page URL within the asset. You then embed the “Link” asset into the desired structured content asset.
- **“Query” assets** provide custom search routines to assets that require specific sets of content. A query retrieves a set of assets based on specific criteria (for example, all articles about politics written in the last 24 hours). You select the content you want to include in your asset from the list of results returned by the query.

  The administrator sets up the search criteria for your queries and assigns the queries in advance to the assets that need them. The content retrieval for such assets is thus automated — no user input is required for a query to return its results to the asset.
- **“Collection” assets** store lists of basic assets of a single asset type, organized in a specific order. You use “Collection” assets to choose, rank in order, and deliver sets of content that your visitors will most likely want to see when viewing your site. For example, you can use a “Collection” asset to build and place a list of top five articles on politics on the home page of your site, and rank the assets in the list to appear in order of importance.

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

Content Server’s Data Models

Asset data models define how content is stored in the Content Server database—in either a flat (single-level) or hierarchical (multi-level) structure. In Content Server, the flat model is referred to as the basic model, and the hierarchical model as the flex model. The data model is chosen by the developers during asset type creation to suit site design requirements.

Note

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

Basic vs. Flex

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

- **Basic assets** are instances of basic asset types and always have the same set of properties (attributes), as defined by the asset type. They can be associated with other assets to form single-level “parent-child” dependencies, but they cannot inherit each other’s properties. Thus, no complex hierarchies can be created with basic assets.

- **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.

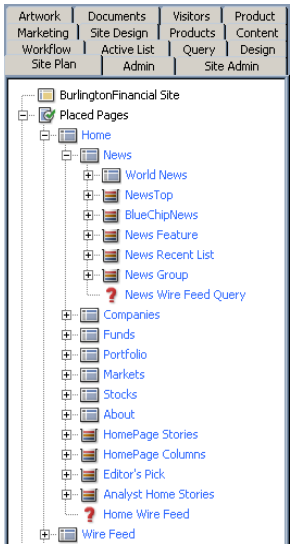
  For more information, see Appendix A, "The Flex Asset Model."

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).

  In the Advanced and Dash interfaces, you can view a hierarchical representation of the site design for the CM site you are logged in to by clicking the **Site Plan** tab in the tree in the left pane of the Content Server interface. For example, a section of the site plan for the Burlington Financial sample site looks like this in the Advanced interface:



  Notice the hierarchical structure in which the content is organized.

> **Note**
>
> The Site Plan tree is not available in the Portal interface. The above image is for reference only.

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

  If you have permissions to work with more than one site, a site select screen appears when you log in to Content Server, allowing you to select the CM site you want to

work with. You can also switch between CM sites during your session using the **Site** link at the right edge of the top bar.

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

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

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.

Permissions to Assets

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

For example, the administrator may deny you the permission to create assets of a particular type; in this case, the asset type will not be displayed in the “Create Content” or “Create Document” portlets. You will also be unable to copy existing assets of that type.

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

Dependencies

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

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

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

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

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

Whenever dependencies prevent you from performing a task, Content Server warns you of that fact and identifies the offending assets. You can then take appropriate actions to resolve the conflicts. For example, if you try to delete an asset that is referenced by other assets, Content Server displays a list of assets referencing the asset you are trying to delete. You must first remove the reference creating the dependency between the assets; only then can the referenced asset be deleted. If a hierarchical relationship exists between multiple assets, you must remove the dependencies the bottom of the hierarchy up.

Selecting Page Content

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

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

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

When selecting content, you can use the **Preview** function to see how an asset would look if it were published, provided the asset has a template assigned to it. For more information on previewing, see “Previewing Assets,” on page 102.

Approving and Publishing Assets

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

Approving Assets

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

Note

In some instances, unapproved assets are automatically published. For example, if a previously published asset is deleted from the content management system, it is automatically approved for publication to the delivery system as a deleted asset. When the next publishing session runs, the asset is published to (and thus deleted from) the delivery system.

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

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

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

For more information about approving assets, see Chapter 15, “Publishing.”

Publishing Assets

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

Content can be published in three distinct ways:

- **Static (or Export to Disk)** — Content Server creates static HTML files on a local or networked file system. Content in this form can be delivered directly to a web browser (by a web server, for example).
- **Dynamic (or Mirror to Server)** — Content Server copies the published content from the content management system's database to the delivery system's database. The delivery system is the online site that the site visitors access. When the content is requested by a site visitor, the delivery system retrieves the content from its database, applies the selected formatting and layout, and delivers that content to the site visitor's browser. (If the content is already cached, the cached copy is delivered instead.)
- **Export to XML** — Content Server converts the published content to XML files. The resulting XML files can be imported by delivery systems not running Content Server.

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

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

For more information on publishing, see Chapter 15, "Publishing."

Users, Roles, and Workflow Assignments

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

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

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

When workflow is in use on your CS system, tasks and permissions are for the most part assigned to roles rather than user names. Although you log in with your user name, it is your assigned role that determines what you can do.

When you log in to the Portal interface, Content Server shows you all of the assets assigned to you (in the "Content Assignments" and "Document Assignments" portlets)

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

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

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 14, "Revision Tracking"):

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

Check In and Check Out

To work with an asset when revision tracking is enabled:

1. You check the asset out from the database.

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

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

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

Archive Options

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

Cancelling Checkout

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

Rollback with Revision History

If, after checking an asset in, you decide you do not want to keep the changes you made to it, you can roll the asset back to any of its stored previous versions by using the **Rollback** function. You, and any other user, can also view the asset's version history.

Part 2

Working in the Portal Interface

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

Chapter 2

Getting Started with the Portal Interface

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

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

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

This chapter contains the following sections:

Before Logging In

Before logging in, make sure you are using a supported browser. To find out if your browser is supported, contact your administrator.

If you are using the Portal interface for the first time and you are using Internet Explorer, you must configure Internet Explorer to refresh pages as quickly as the Portal interface delivers new information to them. Once the browser is configured, you can log in to the Portal interface and expect up-to-date displays.

To configure Internet Explorer

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

Logging In to the Portal Interface

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

Before logging in

1. Before logging in to the Portal interface, do the following:
   a. Configure your browser as shown in “Before Logging In,” on page 40.
   b. Consult with your administrator about the login procedure and obtain the following information:
      - The URL for the Portal interface
      - Your user name
      - Your password
      - The login procedure

To log in to the portal interface

2. Open your browser.
3. Enter the URL for the Portal interface.
4. Enter the user name and password provided by your administrator.
5. Click one of the tabs displayed in the interface to access the “Site Info” portlet (you will learn more about these tabs in the next section).

   In the “Site Info” portlet, select the site you want to work with. If you do not know what site to select, ask your administrator. After you select a site, Content Server displays your workspace.

   Note

   Depending on your installation, the “Site Info” portlet may display a list of the following sample sites: Burlington Financial, GE Lighting, Hello Asset World, and Spark.

   In this guide, we are using the “Spark” sample site to illustrate the Portal interface. **Spark Contact**, **Spark Document**, **Spark Folder**, **Spark Job**, and **Spark News Item** are all asset types specific to the Spark sample site.

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

Learning Your Workspace

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

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

Each portlet contains sizing icons (Figure 5) for adjusting the portlet's dimensions to normal (native) size, minimized (collapsed), and maximized. The portlets can also be moved within the interface to new positions and different pages.

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

Content Management (CM) Portlets

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

To learn about the CM portlets

1. Log in to the Portal interface. If you need instructions, see "Logging In to the Portal Interface," on page 41.

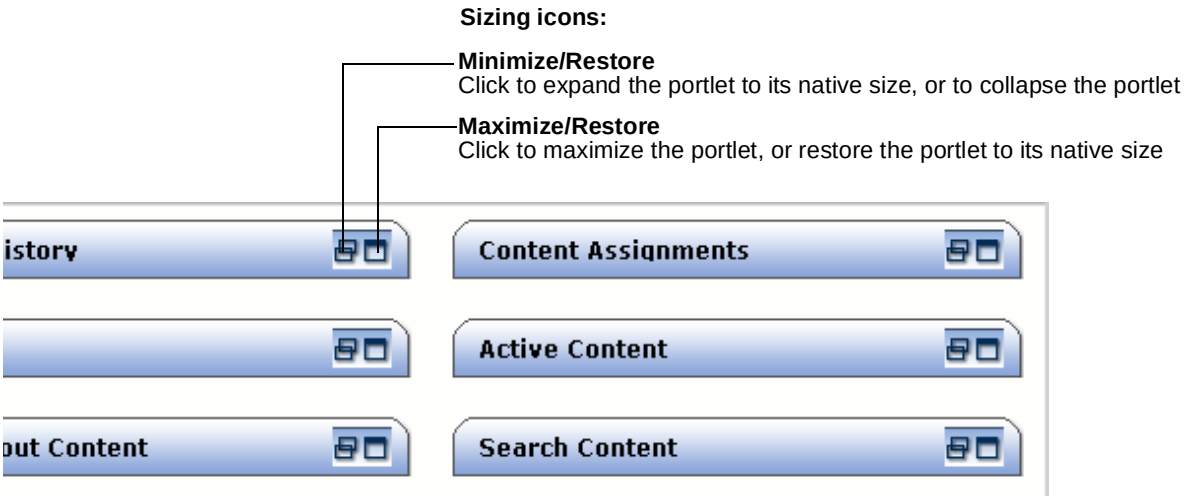
   The Portal interface displays your workspace, containing the portlets you will use to manage content.

   NoteNote

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

2. Click the tab that contains the CM portlets. Your workspace will look similar to the one displayed in Figure 5:

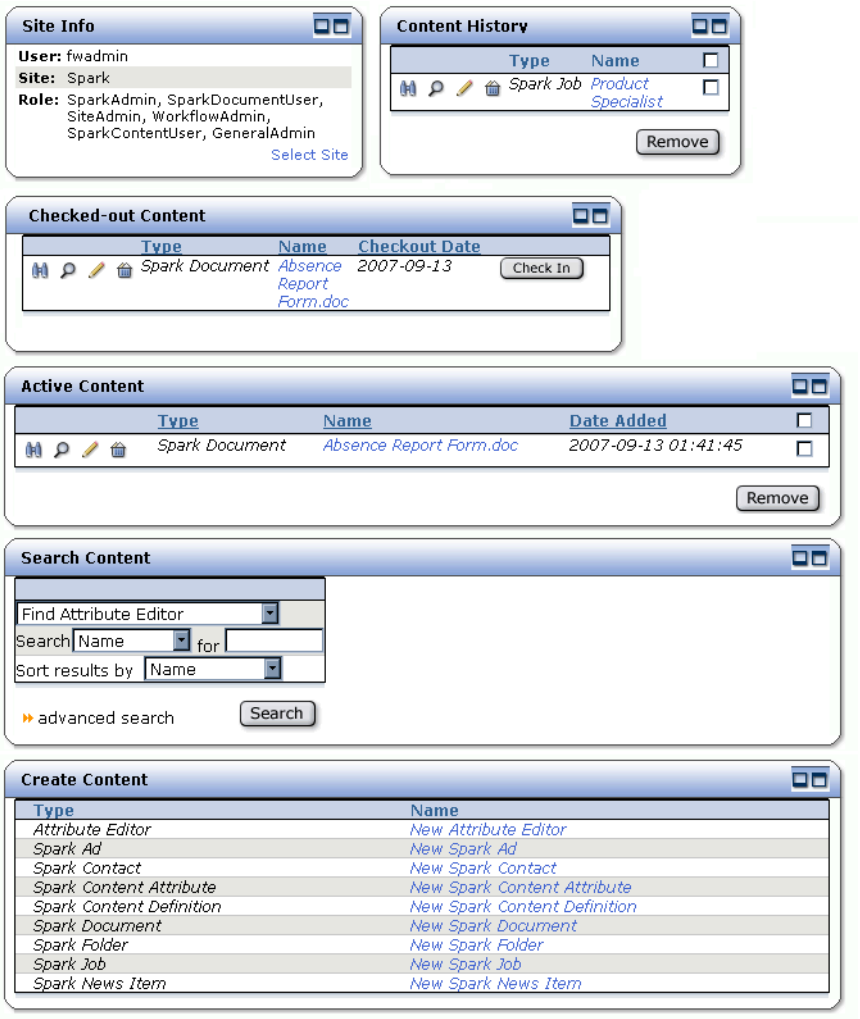
Figure 5: Your workspace



3. Expand the CM portlets to their native dimensions by clicking the minimize/restore icon in each portlet's upper right-hand corner (see Figure 5).

   When you have finished, your workspace will look similar to the one displayed in Figure 6.

Figure 6: Example of CM portlets in a workspace



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

Note that each portlet that lists assets also displays a set of content management tools next to each asset. The portlet's column headings serve as sort options. "Working with Assets," on page 49 provides descriptions of the content management tools and sort options within the portlets.

4. Now that you have maximized all of the CM portlets that you have access to, take some time to learn about them by reading the descriptions provided in Table 1, "Content Management (CM) portlets."

5. When you finish reading about CM portlets, proceed to the next section, "Document Management (DM) Portlets," on page 46

Table 1: Content Management (CM) portlets

CM Portlet	Description	See...
Active Content	Used to log your "favorite" assets for quick and easy access. "Active Content" treats your list of selected assets as permanent. The assets can be removed at your command, either individually or in bulk. If you have logged no assets, this portlet displays the message "No asset in Active List." **Note:** Content in the portal environment is referred to as "assets" and "asset types." For more information about assets and asset types, see "Basic Content Management Concepts," on page 23.	Chapter 8, "Logging Assets"
Checked-out Content	Displays a list of all assets that are checked out to you. In this portlet, you can check the assets back into the database (as well as inspect and edit them). If no assets are checked out to you, this portlet displays the message "No assets in Checkout List."	Chapter 14, "Revision Tracking"
Content Assignments	Displays a list of all assets that are assigned to you (by workflow processes). In this portlet you can review all your assignments and finish them (as well as inspect, edit, and delete the assignments). If no assets are assigned to you, this portlet displays the message "No assets in Assignment List."	Chapter 13, "Collaborating in Workflow"
Create Content	Used to create structured content assets, document assets, and folders (for definitions of these terms, see "Basic Content Management Concepts," on page 23). **Note:** A document asset requires you to attach a file to the asset. For information about how document assets differ from structured content assets, see "Structured Content Assets and Document Assets," on page 27.	Chapter 3, "Creating and Editing Structured Content Assets"

Table 1: Content Management (CM) portlets *(continued)*

CM Portlet	Description	See...
Content History	Displays a volatile index of assets. This portlet displays a list of the assets you have created during the current session. The list is volatile; when you end your session, the list is deleted. When you start a session and as long as you create no assets during the current session, this portlet displays the message "No assets in History List." **Note**: Assets can be logged to the portlet "Active Content," where they are displayed until you remove them there.	Chapter 3, "Creating and Editing Structured Content Assets"
Search Content	Used to: • Search for content by asset type • Execute simple and advanced searches	Chapter 7, "Searching for Assets"
Publish Console	Used to publish assets to the delivery system, where it is served to a browser so it can be viewed by the end audience.	Chapter 15, "Publishing"

Document Management (DM) Portlets

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

To learn about the DM portlets

1. Click the tab that contains the DM portlets.
2. Expand the DM portlets to their native dimensions by clicking the minimize/restore icon in each portlet's upper right-hand corner (see Figure 5).

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

3. Now that you have maximized all of the DM portlets that you have access to, take some time to learn about them by reading the descriptions provided in Table 2.

Table 2: Document Management (DM) portlets

DM Portlet	Description	See...
Active Documents	Used to log your "favorite" document assets for quick and easy access. "Active Documents" treats your list of selected assets as permanent. The assets can be removed at your command, either individually or in bulk. If you have logged no assets, this portlet displays the message "No assets in Active List." **Note:** Content in the portal environment is referred to as "assets" and "asset types." For more information about assets and asset types, see "Basic Content Management Concepts," on page 23.	Chapter 8, "Logging Assets"
Checked-out Documents	Displays a list of all document assets that are checked out to you. In this portlet, you can check the assets back in (as well as inspect and edit them). If no assets are checked out to you, this portlet displays the message "No assets in Checkout List."	Chapter 14, "Revision Tracking"
Document Assignments	Displays a list of all document assets that are assigned to you (by workflow processes). In this portlet you can review all your assignments and finish them (as well as inspect, edit, and delete the assignments). If no assets are assigned to you, this portlet displays the message "No assets in Assignment List."	Chapter 13, "Collaborating in Workflow"
Document History	Displays a volatile index of document assets. This portlet displays a list of the document assets you have created during the current session. The lists are volatile; when you end your session, the lists are deleted. When you start a session and as long as you create no assets during the current session, this portlet displays the message "No assets in History List." **Note**: Document assets can be logged to the portlet "Active Documents," where they are displayed until you remove them from there.	Chapter 5, "Creating and Editing Document Assets and Folders"

Table 2: Document Management (DM) portlets *(continued)*

DM Portlet	Description	See...
My Documents	Used to create, edit, and manage document assets and folders in which to organize the document assets. **Note:** A document asset requires you to attach a file to the asset. For information about how document assets differ from structured content assets, see "Structured Content Assets and Document Assets," on page 27.	Chapter 5, "Creating and Editing Document Assets and Folders"
Search Documents	Used to: • Search for document assets • Execute simple and advanced searches	Chapter 7, "Searching for Assets"

Arranging Your Workspace

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

Working with Assets

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

Icon Bar

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

Table 3: Portal interface content management icons

Icon	Description
	**Preview** icon. Clicking an asset's **Preview** icon opens the asset in the InSite interface so that you can see how an asset will look if it were rendered at the portal visitor's browser. The InSite interface also allows you to edit assets and place them on your portal. For more information, see Chapter 9, "Working with the InSite Interface."
	**Inspect** icon. Clicking an asset's **Inspect** icon opens the asset's "Inspect" form, where you can: • Examine the asset's status (for example, determine the asset's state in a workflow) • Reset the asset's status (for example, remove the asset from workflow) • Edit the asset, by clicking its **Edit** icon. An example of an "Inspect" form can found in "Using Workflow Functions," on page 162.
	**Edit** icon. Clicking an asset's **Edit** icon opens the asset's editorial screen (identical to the asset's content-entry screen). Here, you can edit the asset's content.
	**Delete** icon. Clicking an asset's **Delete** icon lets you delete the asset from Content Server.

Active Links

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

Note

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

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

Sort Options

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

Required Fields

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

Logging Out of the Portal Interface

To log out of the Portal interface

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

The Spark Sample Site

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

Note

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

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

Note

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

To log in to the Spark sample site

1. Open your Web browser and enter the URL of the Portal interface.
2. Log in:
   a. In the “User name” field, enter **fwadmin**.
   b. In the “Password” field, enter **xceladmin**.
   c. Click **Login**.
3. Click one of the tabs displayed in the interface to access the “Site Info” portlet.
4. In the “Site Info” portlet, select the Spark sample site.
5. You are now ready to begin experimenting with the workspace and its portlets.
   - For descriptions of the portlets, see Table 1, on page 45 and Table 2, on page 47.
   - To start working with the portlets, follow the steps in “Learning Your Workspace,” on page 42.

Next Steps

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

Chapter 3

Creating and Editing Structured Content Assets

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

Creating a structured content asset involves using content-entry forms whose fields, pre-configured by the administrator, prompt you for certain information (for example, a phone number, an e-mail address, or a description of a stock item) that you save to the CS database (instead of a file). More information about structured content assets is given in "Structured Content Assets and Document Assets," on page 27.

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

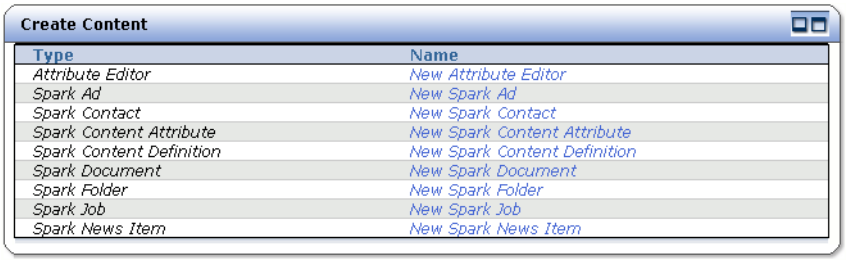
Creating Structured Content Assets

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

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

To create a structured content asset

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

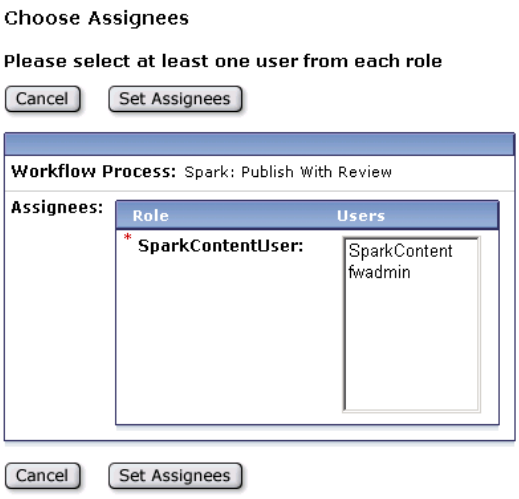


3. If the "Choose Assignees" screen (at the right) is not displayed, it means that your asset is either not associated with a workflow or is associated with a workflow that does not require choosing assignees. Skip to step 4 of this procedure. Otherwise, continue with this step.

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

   (If you need information about workflow, see Chapter 13, "Collaborating in Workflow.")

   b. Click **Set Assignees**.



4. Enter information in the fields of the content-entry form that is displayed. If the form for this asset has fields that are unfamiliar to you, consult your design team or administrator.

   a. In the **Name** field, enter a name for the asset. Note the following conventions when naming the asset:

      - The name must contain 1 (minimum) to 64 (maximum) alphanumeric characters.

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

b. (Optional) If you plan to create translations of the asset, set the asset's language (locale designation) using the "Locale" drop-down list.

> **Note**
>
> This option appears only if at least one locale is enabled on your site. Contact your administrator to find out if your site supports localized assets.
>
> For more information, see Chapter 11, "Working with Multilingual Assets."

c. The asset type you are working with may be divided into subtypes. If this is the case, the "Subtype" drop-down list appears in the "New" asset form. Do one of the following:

- If the "Subtype" list appears in the form, select the subtype of the new asset.
- If the "Subtype" list does not appear, proceed to the next step.

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

- **Required fields.** You must fill in all required (highlighted) fields before you are permitted to save the asset. Fill in all other fields as necessary.
- **WYSIWYG text fields.** You may see one or more text fields that are WYSIWYG-enabled (What You See Is What You Get) via a WYSIWYG editor, such as FCKEditor (see "Working with FCKEditor," on page 119). These text fields allow you to enter and format your content using controls similar to those of Microsoft Word. For more information, see "Overview," on page 118.
- **Date fields.** You may see a **Date Picker** (calendar) icon next to a date field. Clicking the icon invokes the Date Picker attribute editor; see "Working with the Date Picker," on page 127 for more information.
- **Image Picker fields.** You may see one or more fields that prompt you to visually select an image asset to be associated with the asset you are creating. In such cases, you will see a **Browse Image Repository** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more information on Image Picker, see "Working with the Image Picker," on page 120.
- **Online Image Editor fields.** You may see a field (or fields) that allows you to compose and edit graphics and images directly in the asset form, using the Online Image Editor tool. For detailed instructions, see "Working with the Online Image Editor," on page 122.
- **Flash content fields.** You may see a section in the asset form that prompts you to compose Flash content from Flash templates, images and text of your choice. For detailed instructions, see "Working with Flash Content," on page 125.

- **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 **Browse** button, proceed to the next step.

  2) Click **Browse**.

     Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

  3) In the **Search For** field in the **Search** tab, enter criteria identifying the asset. If you don't enter any criteria, all assets eligible as values for the selected field will be returned.

  4) Click **Search**.

  5) In the list of search results, click the desired asset.

     Note

     You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

     The pop-up window automatically closes.

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

   If you duplicated any information that must be unique, Content Server displays an error message and keeps the asset's "Edit" form open. In such cases, edit the appropriate field, then click **Save**.

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

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 169.

7. (Optional) If you want to see how the asset would look if it were published, you can preview it. For more information, see "Previewing Assets," on page 102.

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

Editing Structured Content Assets

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

To edit a structured content asset

1. Find the asset in the Portal interface. These are some of your options:
   - Run a search on the asset. For instructions, see Chapter 7, "Searching for Assets."
   - Look for the asset in the portlet "Active Content," assuming that you keep an active list (for more information about "Active Content," see Chapter 8, "Logging Assets").
   - If the asset was created during the current session, look for the asset in the portlet "Content History."
2. If desired, preview the asset using the procedure "Previewing Assets," on page 102.
3. Click the asset's **Edit** icon.

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

4. Make your changes to the asset. Note the following when editing the asset:
   a. If any of the fields or form sections are unfamiliar to you, consult your developers or CS administrator.
   b. 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 127 for more information.
      - **WYSIWYG text fields.** You may see one or more text fields that are WYSIWYG-enabled (What You See Is What You Get) via a WYSIWYG editor, such as FCKEditor (see "Working with FCKEditor," on page 119). These text fields allow you to enter and format your content using controls similar to those of Microsoft Word. For more information, see "Overview," on page 118.
      - **Image Picker fields.** You may see one or more fields that prompt you to visually select an image asset to be associated with the asset you are editing. In such cases, you will see a **Browse Image Repository** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more

information on Image Picker, see "Working with the Image Picker," on page 120.

- **Online Image Editor fields.** You may see a field (or fields) that allows you to compose and edit graphics and images directly in the asset form, using the Online Image Editor tool. For detailed instructions, see "Working with the Online Image Editor," on page 122.
- **Flash content fields.** You may see a section in the asset form that prompts you to compose Flash content from Flash templates, images and text of your choice. For detailed instructions, see "Working with Flash Content," on page 125.
- **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 editing.

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

     If the field displays a **Browse** button, proceed to the next step.

  2) Click **Browse**.

     Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

  3) In the **Search For** field in the **Search** tab, enter criteria identifying the asset, then click **Search**.

  4) In the list of search results, click the desired asset.

     Note

     You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

     The pop-up window automatically closes.

5. Click **Save** to save your changes.
6. (Optional) If you want to see how the asset would look if it were published, you can preview it. For more information, see "Previewing Assets," on page 102.

   Note

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

Deleting Structured Content Assets

To delete a structured content asset

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

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

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

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

Chapter 4

Working with ‘My Documents’

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

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

This chapter contains the following sections:

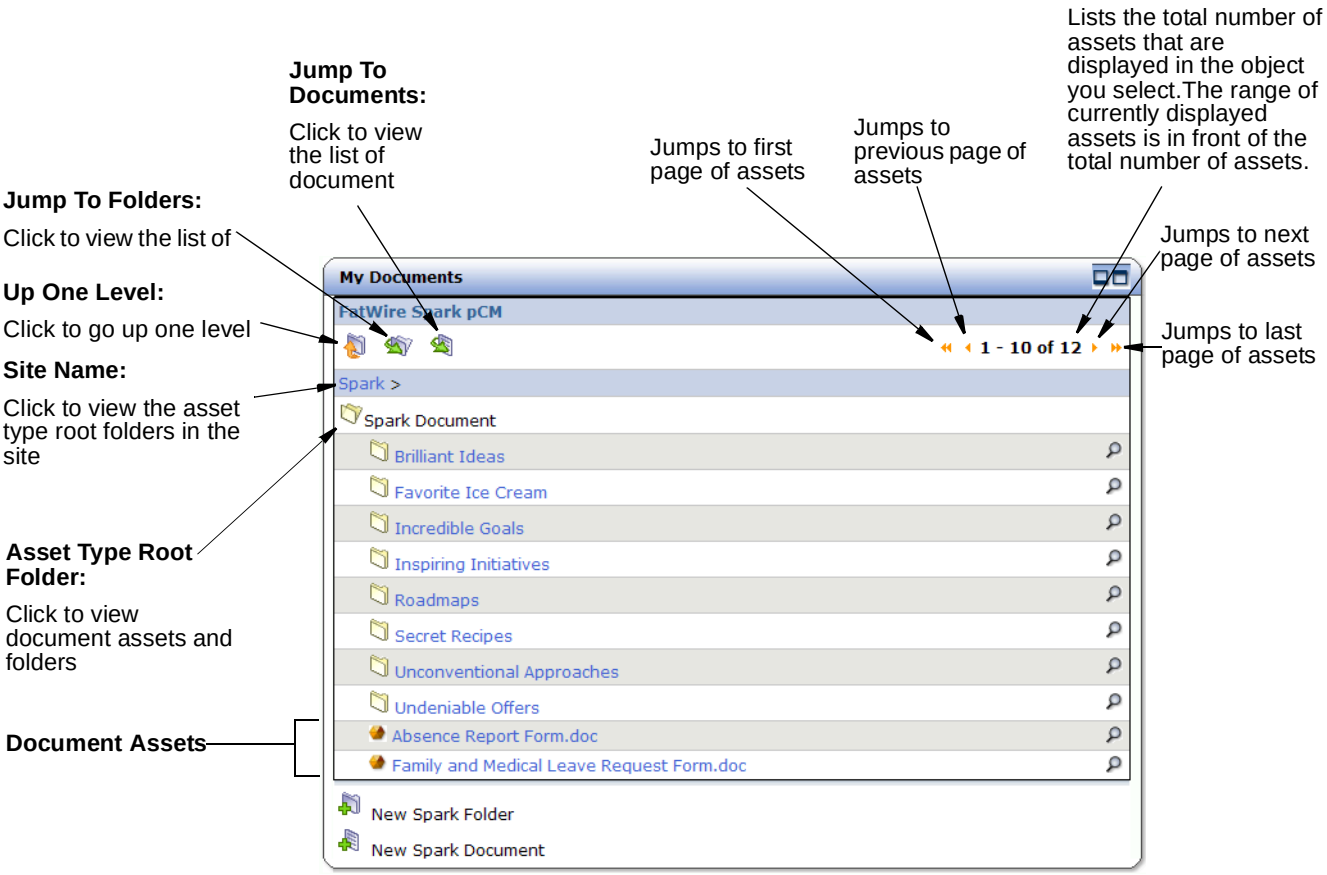
Overview of the ‘My Documents’ Portlet

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

Figure 7 displays several folders and document assets in the “My Documents” portlet. Figure 7 also explains the navigational tools available in the portlet.

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

Figure 7: ‘My Documents’ portlet

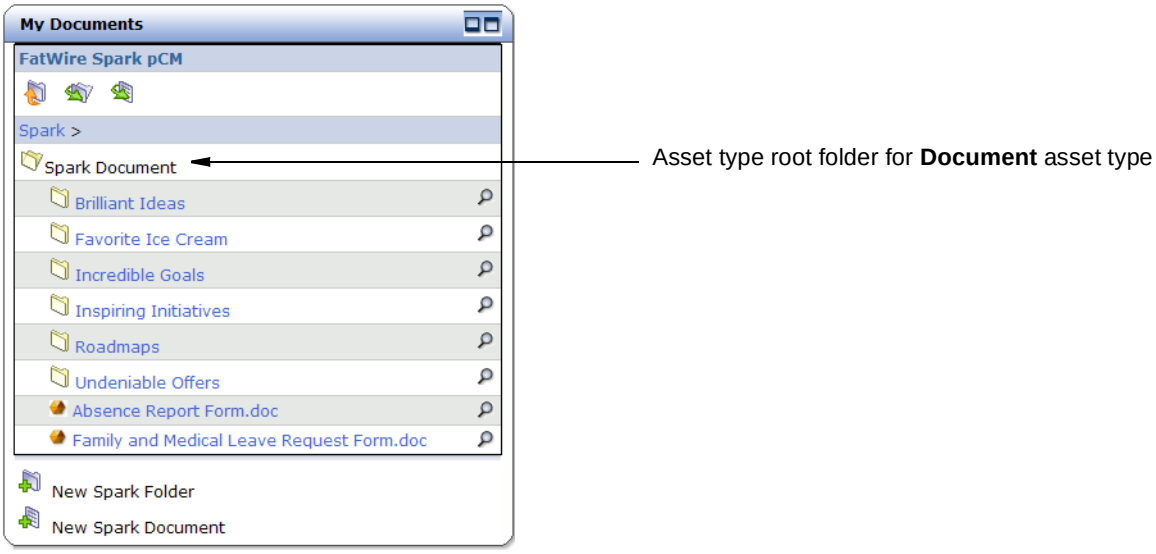


‘My Documents’ Portlet Structure

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

From the asset type root folder you can navigate through your folders, view document assets, or inspect and edit document parameters. Expanding an asset type root folder displays the document assets of that asset type and the sub-folders associated with the asset type (Figure 8 displays an example of this).

Figure 8: An expanded asset type root folder in ‘My Documents’



Note

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

Navigating the ‘My Documents’ Portlet

In the Portal interface, you can navigate through different folders to view their associated document assets.

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

If your site does not have any content, you can log in to the Spark sample site to learn how to view document assets and folders. (If you need instructions for logging in to the Spark sample site, see “To log in to the Spark sample site,” on page 51.)

1. Maximize the portlet “My Documents.”
2. Click the name of an asset type root folder to display its document assets and sub-folders. (If you do not see asset type root folders, click the site name displayed in the portlet.)
   - If there are folders or document assets in the root folder they are displayed.
   - If more than 10 folders or assets are in the root folder, use the arrow keys in the upper right-hand corner to navigate the portlet (see Figure 7, on page 62).
3. To expand a sub-folder, click its name. Continue to navigate through the folder hierarchy by clicking sub-folders.
4. To collapse a folder, click the **Up One Level** icon  .
5. To collapse all expanded sub-folders, click the name of the asset type root folder.

To use the ‘My Documents’ portlet navigation icons

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

- To navigate up one level, click the **Up One Level** icon:  .

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

Chapter 5

Creating and Editing Document Assets and Folders

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

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

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

Working with Document Assets

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

Note

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

This section shows you how to create, edit, and delete document assets. If you need information about document assets and how they differ from structured content assets, see “Structured Content Assets and Document Assets,” on page 27.

Creating Document Assets

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

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

Note

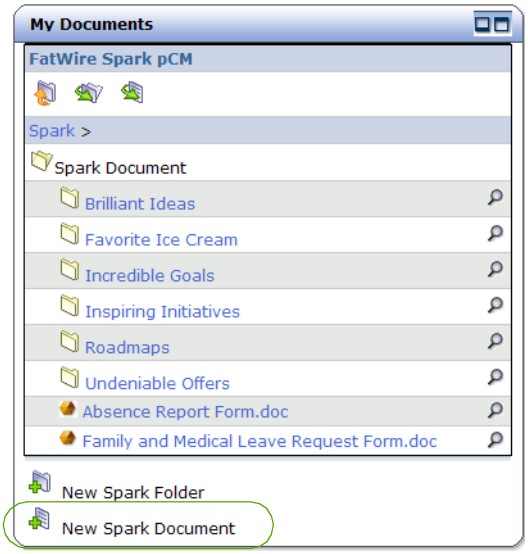
Your access to portlets depends on the permissions granted to you by your administrator. For example, you may only have access to Document Management portlets, and therefore would have not access to the “Content History” and “Active Content” portlets.

Before creating a document asset

1. Obtain or create the file that you plan to attach to the document asset. If the file is not available, you will need to interrupt this procedure, obtain (or create) the file, and restart this procedure. The file can be of any type (for example, .doc, .ppt, or .xls) and must reside on your local machine (or on a network drive that you can access).
2. If you will be assigning your document asset to the asset type root folder, proceed to step 3. Otherwise, you will be assigning your document asset to a sub-folder. Make sure the folder exists, or create one if necessary:
   - To check for the folder, run a search (if you need help, see Chapter 7, "Searching for Assets").
   - To create a folder, follow the steps in "Creating Folders," on page 76.
3. Continue to the procedure, "To create a document asset using the 'My Documents' portlet," or "To create a document asset using the 'Create Content' portlet," on page 71.

To create a document asset using the 'My Documents' portlet

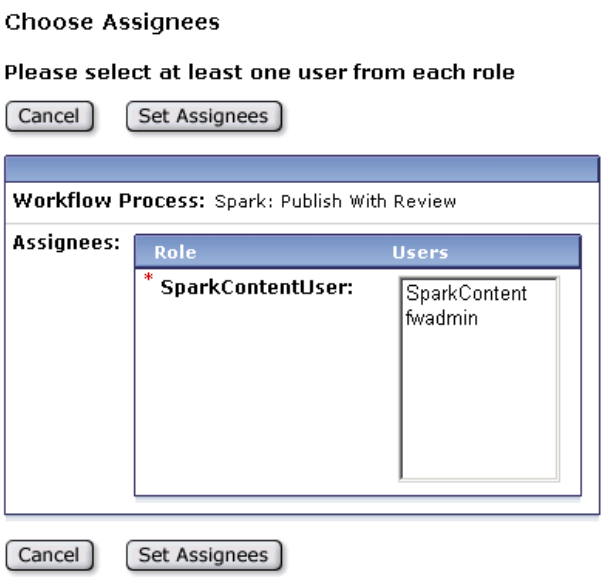
1. Maximize the portlet "My Documents."
2. Click the name of the asset type root folder of the asset you are creating. (If you do not see this folder, click the site name displayed in the "My Documents" portlet).
3. Click the new document icon for the asset type of your new asset, located at the bottom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



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

   (If you need information about workflow, see Chapter 13, "Collaborating in Workflow")

In the “Choose Assignees” screen, do the following:



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

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

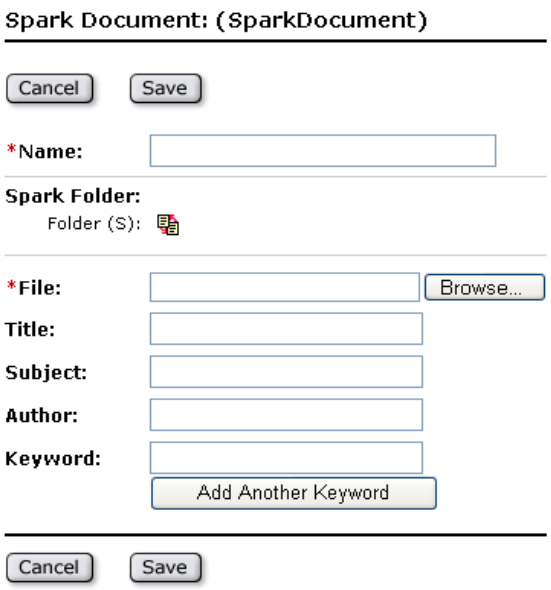
b. Click **Set Assignees**.

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

System-Defined Fields:

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

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



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

See Table 4, on page 69 if you need descriptions for the system-defined fields in the content-entry form. Your site developers can help you with custom fields, which are not described in this table.

Table 4: Field descriptions for the document asset content-entry form

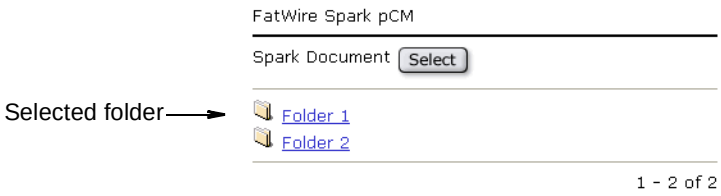
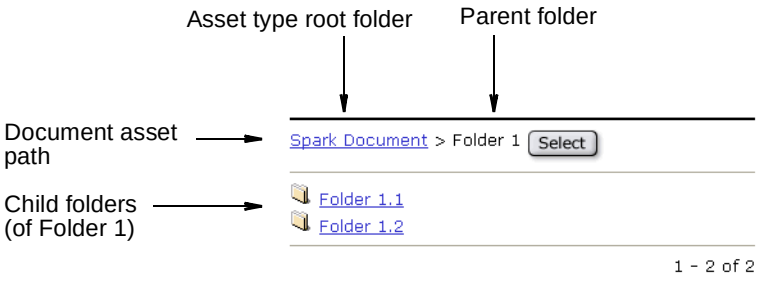
	Field Name	Description
System-defined fields	*Name	The name of the document asset you are creating. The name that you enter will be used to identify the asset in the portlets.
	Folder	This is the folder to which you are assigning the document asset. (The folder is the parent of the document asset.) The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

Table 4: Field descriptions for the document asset content-entry form *(continued)*

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

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

To create a document asset using the 'Create Content' portlet

1. Maximize the portlet "Create Content."
2. In the "Name" column, select the desired type of asset.
3. From this point forward, the procedure is the same as when using the "My Documents" portlet to create document assets. Follow steps 4–6 in "To create a document asset using the 'My Documents' portlet" to finish creating the new asset.

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

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

Editing Document Assets

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

To edit a document asset

Complete the following procedure to edit a document asset.

Download and edit the file

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

> **Note**
>
> You will not be able to edit an asset if one of the following holds:
>
> - The asset is checked out to another user.
> - You have no permission to edit the asset.
>
> The Portal interface notifies you of each condition by displaying the message "`Cannot perform this operation`."
>
> When you access a document asset from a content management portlet, (such as "Search Content"), you will see a **Document Management View** link in the content-entry form. Because you are accessing the document asset from a content management portlet, the content-entry form will display content management fields (such as fields related to publishing) that may be not be directly related to your task of editing the document asset.
>
> If you want to simplify your view of the content-entry form, click the **Document Management View** link. This view displays only document management fields (the fields that are displayed when creating a new document asset from the "My Documents" portlet).
>
> If you would like to return to the view that displays all of the fields, right-click in the content-entry form and select **Back** in the popup menu.

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

   The "File Download" screen appears.

5. Click **Open**.

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

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

Upload the edited file

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

Moving Document Assets

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

To move a document asset to a sub-folder

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

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

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

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

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

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

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

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

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

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

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

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

4. In the "Folder" field, click the folders icon () to display the path to the document asset. The name of this field depends on how your site developers named parent folders.
5. Click the name of the asset type root folder.

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

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

Deleting Document Assets

To delete a document asset

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

   The Portal interface displays one of the following:

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

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

Working with Folders

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

Creating Folders

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

Before creating folders

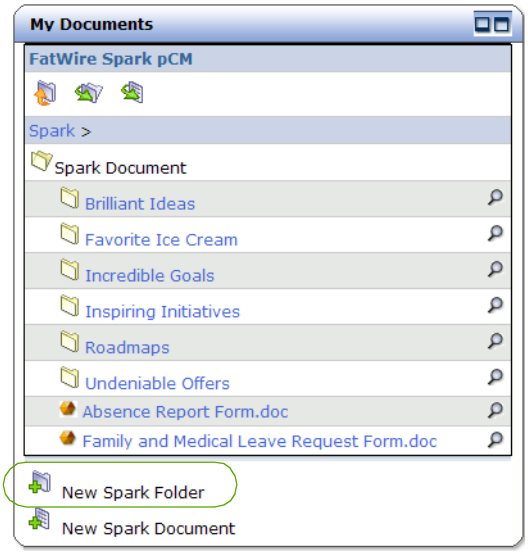
1. If you are planning to create a hierarchy of folders in the site's document management system, first plan the hierarchy by drafting a sketch. Then, follow the steps below to create the folders one by one, starting with the topmost folder. Planning will help you avoid repeating steps or taking extra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

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

To create a folder

2. Maximize the portlet "My Documents."
3. Click the name of the asset type root folder of the asset type that you are creating a folder for. (If you do not see this folder, click the site name displayed in the "My Documents" portlet.)
4. Click the new folder icon  for the folder you want to create (located at the bottom of the portlet). The name next to the icon depends on how your site developers named folders (you may see several new folder names to choose from).

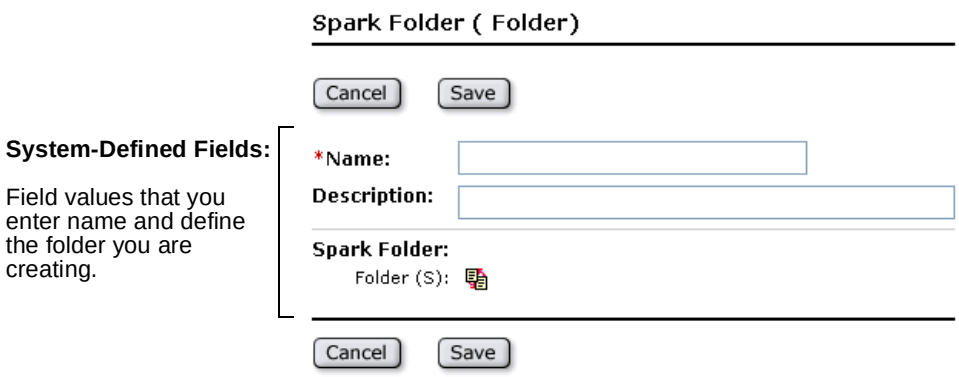
   In the example displayed in the following image, you would click the **New Spark Folder** icon to create a new folder for the **Document** asset type.



Note

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

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



5. Fill in the fields in the form.

See Table 5 for descriptions for the system-defined fields in the folder content-entry form. Your site developers can help you with custom fields, which are not described in this table.

Table 5: Field descriptions for the folder content-entry form

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

6. Click **Save** to save the folder and return to "My Documents."
7. If you are creating a hierarchy, do the following:
   a. Repeat steps 4–6 of this procedure to create as many additional folders as necessary. In step 5, make sure to populate the "Folder" field by selecting the previously created folder.
   b. If you need to verify your folder hierarchy, see "Working with 'My Documents'," on page 61 for instructions on viewing the hierarchy.

Editing Folders

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

To edit a folder

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

Moving Folders

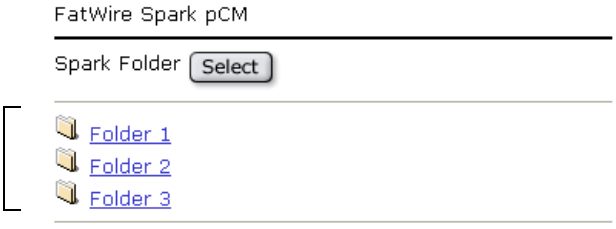
You may find it necessary to re-arrange folders in the hierarchy (for example, you may need to move a folder from the asset type root folder to a sub-folder).

To move a folder to a sub-folder

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

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

   If the screen that opens does not display a list of folders, click the name of the asset type root folder to display the folders in the asset type root folder.



Folders in the **Spark Document** root folder

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

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

To move a folder to the asset type root folder

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

1. Run a search on the folder you want to move. If you need instructions, see Chapter 7, "Searching for Assets."
2. Click the folder's **Inspect** icon.
3. In the folder's "Inspect" form, click the folder's **Edit** icon.
4. In the "Folder" field, click the folders icon ().
5. Click the name of the asset type root folder.
6. Click **Select**.
7. Click **Save Changes**.

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

Deleting Folders

To delete a folder

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

   The Portal interface displays one of the following:

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

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

Chapter 6

Creating New Assets by Copying

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

The copy function is available for both structured content assets and document assets. However, like many other functions, it is permissions based. In order to copy document assets, you must have permissions to document assets. Similarly, to copy structured content assets you must have permissions to structured content assets. (For information about structured content assets and document assets, see “Structured Content Assets and Document Assets,” on page 27.)

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

Copying Assets

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

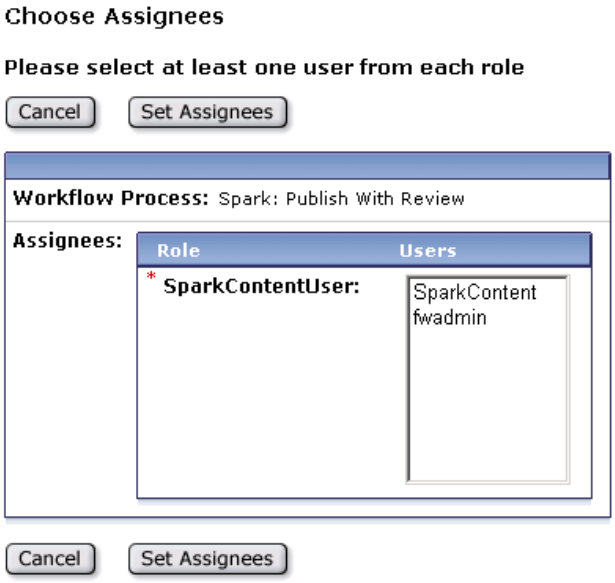
To copy an asset

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

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

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

   In the "Choose Assignees" screen, you need to set the assignees—users to whom you are assigning the asset. Any of these users can complete the next step in the workflow process. (If you need information about workflow, see Chapter 13, "Collaborating in Workflow.")



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

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

   b. Click **Set Assignees**.

5. A form containing the fields and values of the asset you copied appears. For each field, replace the copied content as necessary; if any of the fields or form sections are unfamiliar to you, consult your developers or CS administrator:

a. In the **Name** field, replace the copied name with a unique name for the new asset. Note the following conventions when naming the asset:

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

b. (Optional) Set or change the new asset's language (locale designation) using the "Locale" drop-down list.

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

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

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

For more information, see Chapter 11, "Working with Multilingual Assets."

c. You may see one or more of the following types of fields:

- **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.
- **WYSIWYG text fields.** You may see one or more text fields that are WYSIWYG-enabled (What You See Is What You Get) via a WYSIWYG editor, such as FCKEditor (see "Working with FCKEditor," on page 119). These text fields allow you to enter and format your content using controls similar to those of Microsoft Word. For more information, see "Overview," on page 118.
- **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 127 for more information.
- **Image Picker fields.** You may see one or more fields that prompt you to visually select an image asset to be associated with the asset you are creating. In such cases, you will see a **Browse Image Repository** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more information on Image Picker, see "Working with the Image Picker," on page 120.
- **Online Image Editor fields.** You may see a field (or fields) that allows you to compose and edit graphics and images directly in the asset form, using the Online Image Editor tool. For detailed instructions, see "Working with the Online Image Editor," on page 122.

- **Flash content fields.** You may see a section in the asset form that prompts you to compose Flash content from Flash templates, images and text of your choice. For detailed instructions, see “Working with Flash Content,” on page 125.
- **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 **Browse** button, proceed to the next step.

  2) Click **Browse**.

     Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

  3) (Optional) In the **Search For** field in the **Search** tab, enter criteria identifying the asset. If you don’t enter any criteria, all assets eligible as values for the selected field will be returned.

  4) Click **Search**.

  5) In the list of search results, click the desired asset.

     Note

     You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

     The pop-up window automatically closes.

6. Click **Save**.

   If you duplicated any information that must be unique, Content Server displays an error message and keeps the asset’s “Edit” form open. In such cases, edit the appropriate field, then click **Save**.

   The Portal interface lists your newly created asset in the “Content History” portlet. If the asset is a document asset, it is also listed in the “Document History” portlet. When you end your session, the lists in these two portlets are deleted.

7. (Optional) If the asset is not preassigned to workflow and you want to use the workflow feature, you can assign the asset to a workflow as described in the section “Assigning an Asset to a Workflow,” on page 169.

8. (Optional) If you want to see how the asset would look if it were published, you can preview it. For more information, see “Previewing Assets,” on page 102.

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

Chapter 7

Searching for Assets

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

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

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

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

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

Search Basics

Here are some general characteristics of searches:

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

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

Search Tips

When running searches on text strings, note the following:

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

Note

By default, the Portal interface uses an SQL database search mechanism.

The Portal interface can be set up to use third-party search engines; for more information, contact your CS administrator.

Running Searches

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

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

Running a Simple Search

In a simple search, assets are located by type, name, description and the user who created or modified the assets. If you need granularity in your search, see "Running Advanced Searches," on page 89.

To run a simple search

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

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

2. In the "Search" form, fill in the fields with your search criteria. If you need field definitions, see Table 6, on page 88.

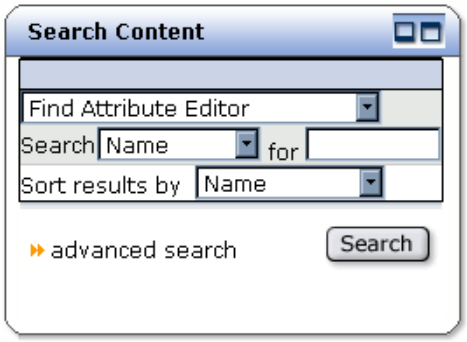
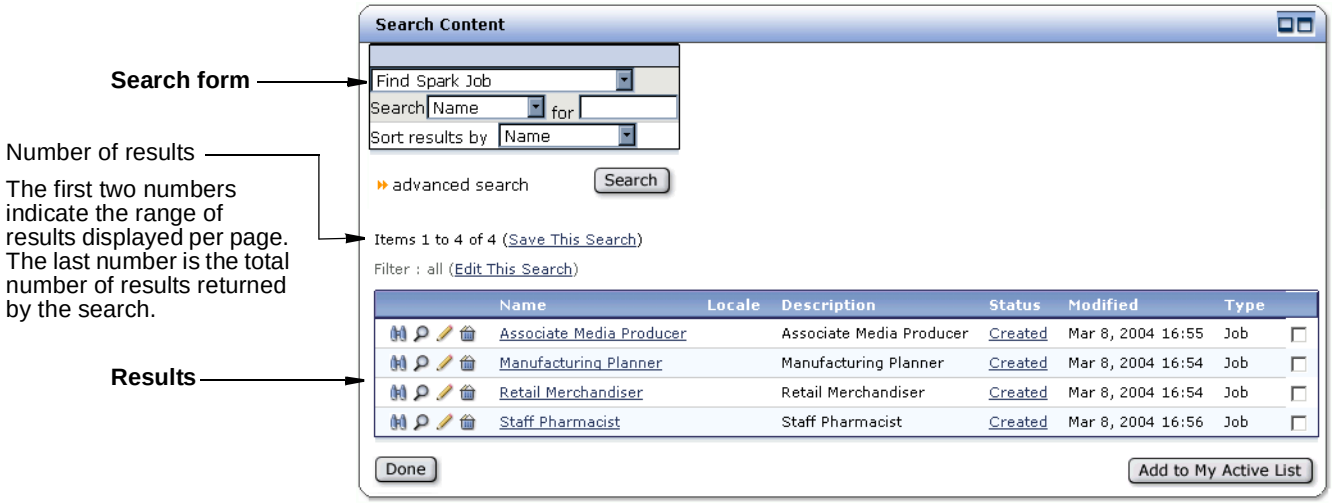


Table 6: Field descriptions for the 'Simple Search' form

Field Name	Description
Find *Asset Type*	Type of asset that you want to search for. The list items will vary depending on the custom asset types created by the developers. Valid entries: An option in the drop-down list.
Search	The search parameter, selected from the drop-down list. Valid entries: An option in the drop-down list.
for	A value for the search parameter that you selected in the previous field. Valid entries: A search string. For more information, see "Search Tips," on page 86. If you leave this field blank, your search will be non-selective. The Portal interface will return all instances of the asset type, up to a maximum of 1,000. If you expect your search results to exceed 1,000, refine your search criteria to avoid taxing system resources and to obtain a complete list of results.
Sort results by	The value by which to sort the search results. Valid entries: An option in the drop-down list.

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

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



To scroll through the simple search results

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

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

To save simple search results

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

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

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

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

Running Advanced Searches

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

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

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

To run an advanced search

1. Maximize either "Search Content" or "Search Documents." Remember that "Search Documents" allows you to search only document assets.
2. From the "Type" field, select an asset type.
3. Click the **advanced search** link.
4. In the "Advanced Search" form, fill in the fields, as necessary. If you need field definitions, see Table 7, on page 90.

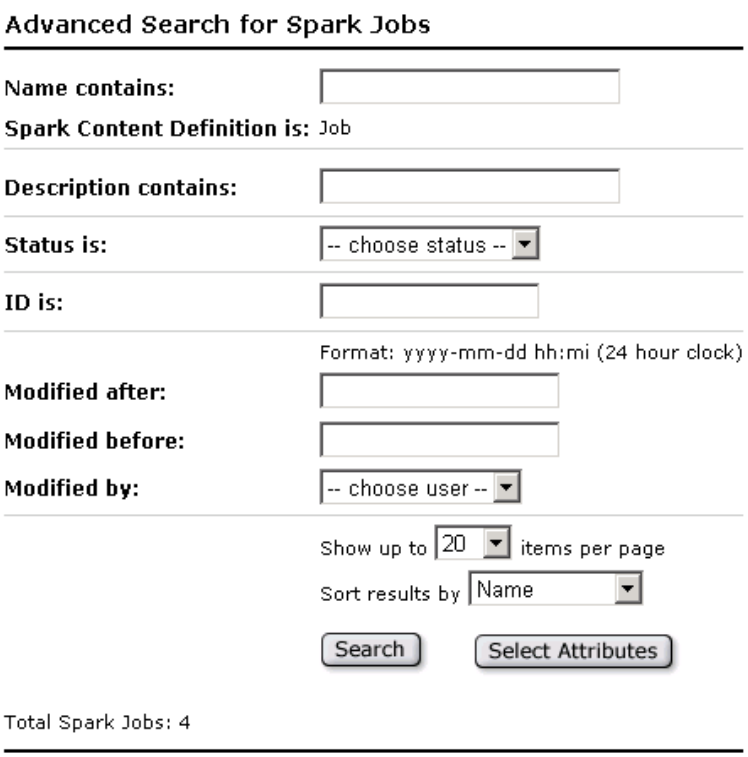


Table 7: Field descriptions for the 'Advanced Search' form

Field Name	Description
Name contains	Words or phrases contained in the name of the asset type you are searching for. Valid entries: See "Search Tips," on page 86.
Content / Document Definition	Information-only field. Confirms the asset type that you selected to search for.
Description contains	Words or phrases contained in the description of the asset you are searching for. Valid entries: See "Search Tips," on page 86.
Status is	The status of the asset you are searching for (e.g., created).
ID is	A unique, system-generated number identifying the asset.
Modified after	The date after which assets of the selected type were modified. Valid entries: A date in the format that is specified above this field.
Modified before	The date before which assets of the selected type were modified. Valid entries: A date in the format that is specified above the "Modified after" field.

Table 7: Field descriptions for the 'Advanced Search' form*(continued)*

Field Name	Description
Modified by	The user who modified assets of the selected type. Valid entries: An option in the drop-down list.
Show up to	The number of search results to display per page.
Sort results by	The value by which to sort the results. Valid entries: An option in the drop-down list.

5. Do one of the following:
   - Click **Select Attributes** (to search by attributes, or their values) and go to step 5 on page 93 to continue the search.
   - Click **Search** to execute the search.

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

To scroll through the advanced search results

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

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

To save advanced search results

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

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

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

Searching for Assets by Attribute Values

Note

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

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

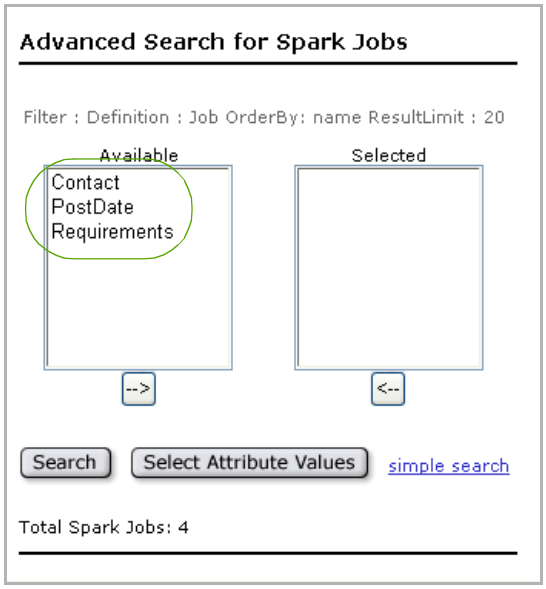
To search for assets by attribute values

1. Maximize either "Search Content" or "Search Documents." Remember that "Search Documents" allows you to search only document assets.
2. From the "Type" field, select an asset type.
3. Click the **advanced search** link.
4. In the "Advanced Search" form, click **Select Attributes**.

5. In the “Select Attributes” form, choose attributes for the search by moving them from the “Available” list box to the “Selected” list box.

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

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



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

   The Portal interface returns the assets whose attributes have the values you specified.
9. To save the search results, follow the steps in “To save advanced search results,” on page 92.

Chapter 8

Logging Assets

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

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

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

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

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

This chapter contains the following sections:

'Active Content' and 'Active Documents' Portlets

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

Note

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

Adding Assets to the Active List

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

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

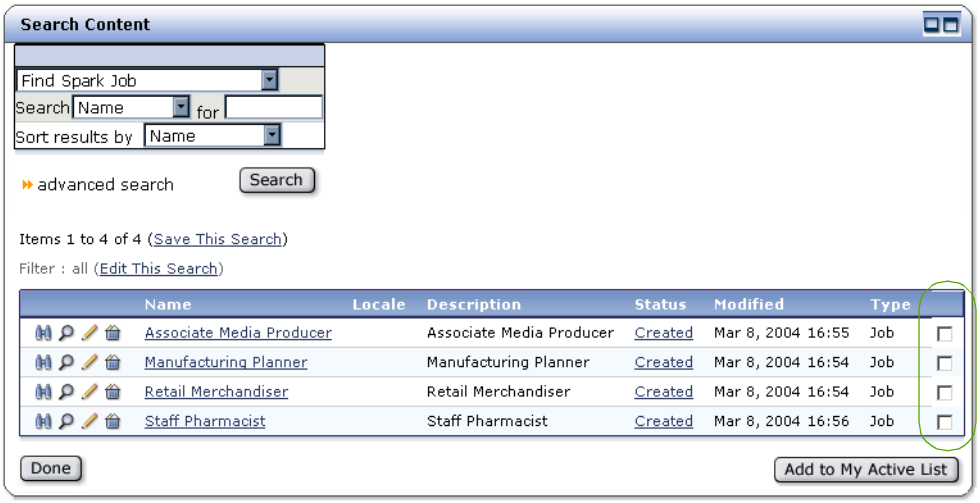
Both methods are shown below.

To add assets in batches to the active list

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

Note

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



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

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

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

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

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

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

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

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

Removing Assets from the Active List

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

Note

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

To remove assets from the active list

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

   Note

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

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

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

Chapter 9

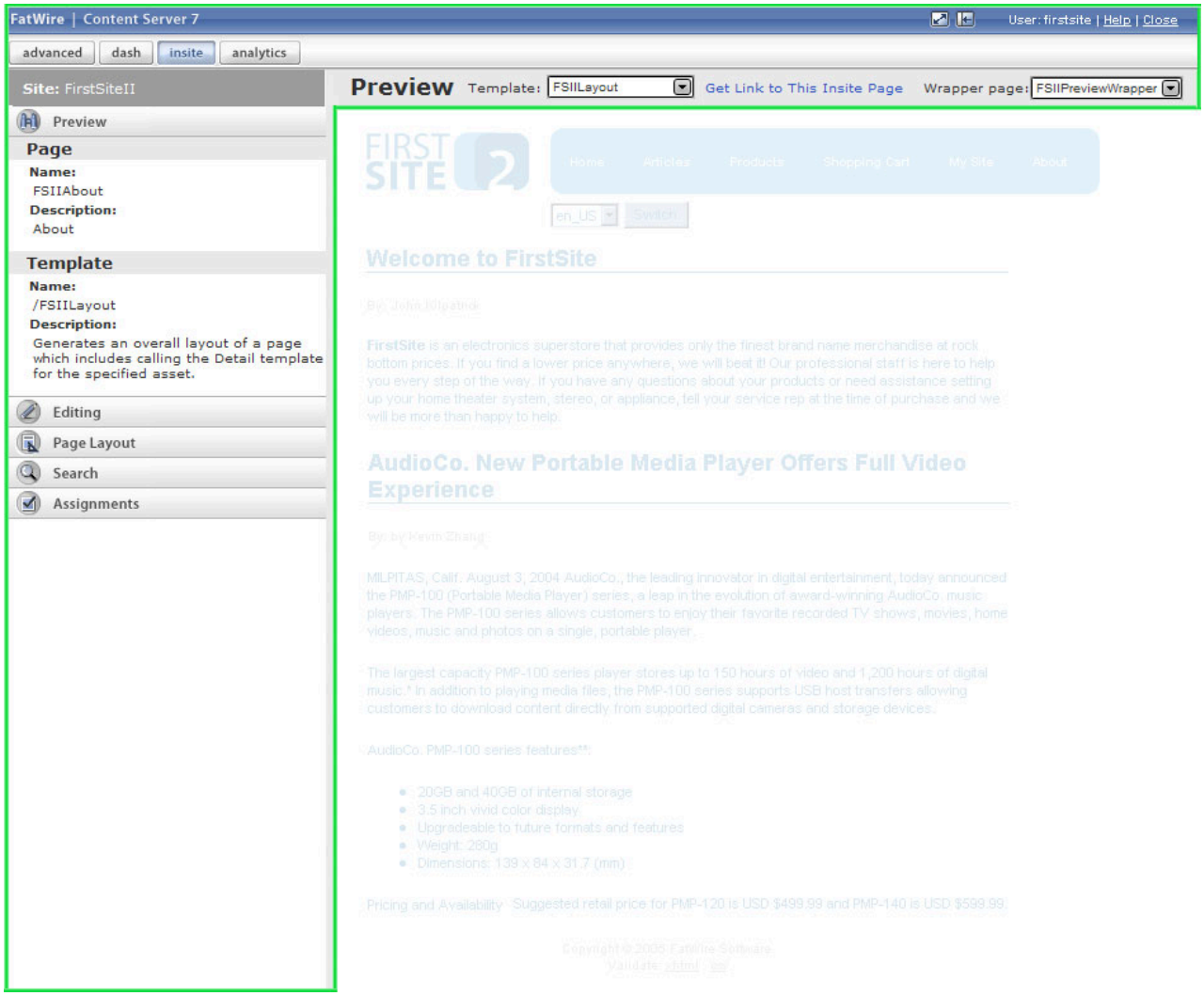
Working with the InSite Interface

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

This chapter contains the following sections:

Overview

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



Note

- The examples in this section are based on the FirstSite II sample site. Depending on how your site is set up, your interface may differ from the depictions in this section.
- 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 102.
- **Editing** – allows you to edit content directly on a rendered page. For more information, see "Editing Assets in the InSite Interface," on page 105.
- **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 107.

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 113.
- **Assignments** – allows you to finish your workflow assignments. For instructions, see "Finishing Your Workflow Assignments Using the InSite Interface," on page 114.

Accessing the InSite Interface

Note

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

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

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

You access the InSite interface by previewing an asset in the Portal interface. 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 Portal interface to search for and preview the desired asset.
- Obtain the InSite URL for the asset from another user or your CS administrator. For example, your colleague would e-mail you the InSite URL for an asset he or she has worked on, so that you can review it or make changes, depending on your permissions.

Note

Use the **Get Link to This InSite Page** function to obtain the InSite URL for an asset. Once you have the URL, you can give it to another user so that he or she can work on the asset in the InSite interface, assuming the user has the necessary permissions. For more information, see "Obtaining the InSite URL for an Asset," on page 116.

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

Note

There are a number of ways to preview an asset. The procedures in this section assume you are previewing an asset as described in the next section, "Previewing Assets."

Previewing Assets

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

Note

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

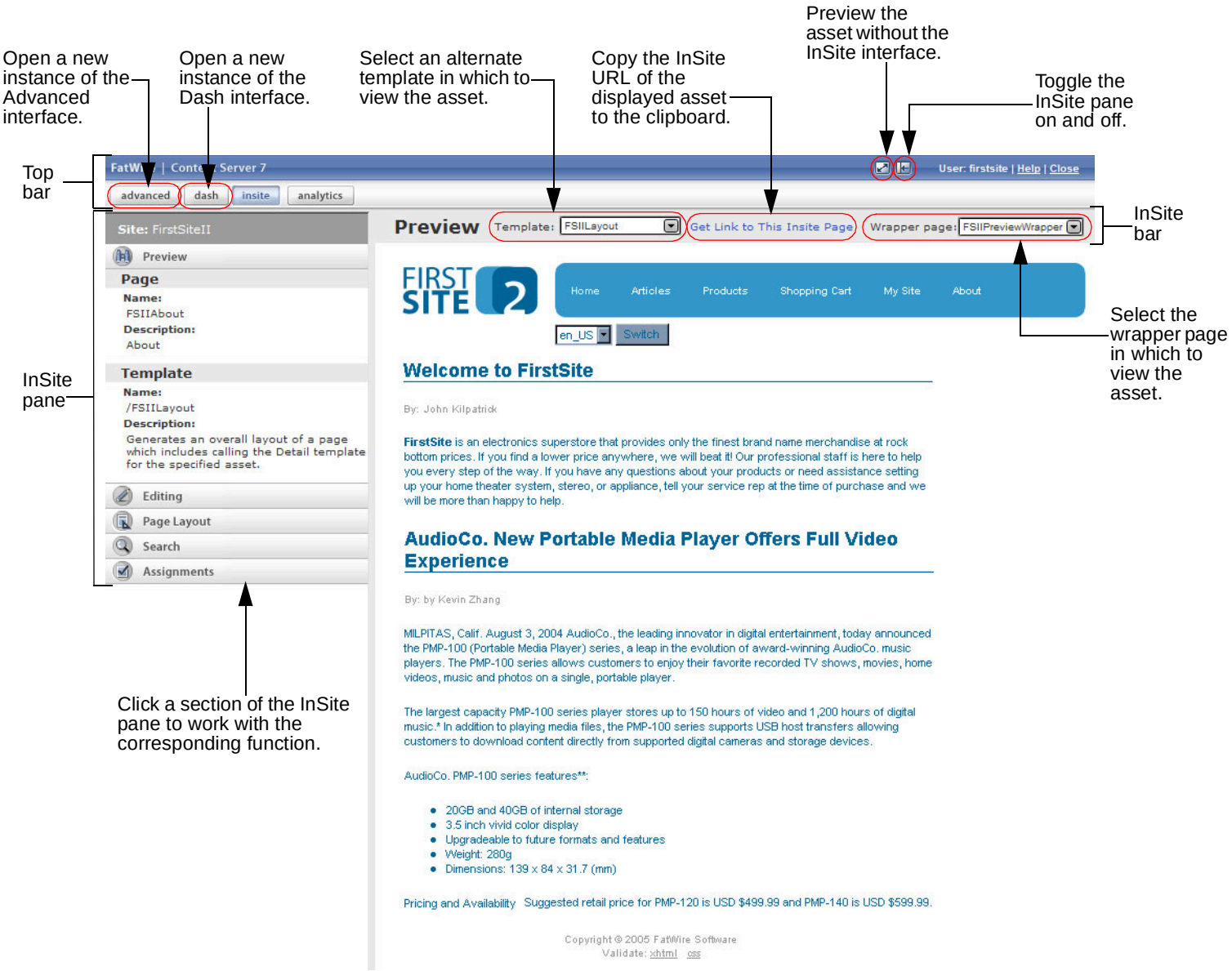
To preview an asset

1. Find the desired asset. Do the following:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.

      For more information on searching, see Chapter 7, "Searching for Assets."
2. Preview the asset. In the list of search results, navigate to the asset you want to work with and click its **Preview** (binoculars) icon.

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

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



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

- **InSite pane** – displays the type, name, and template (including descriptions) of the asset you are working with; allows you to switch between InSite modes ("Preview," "Editing," or "Page Layout"), search for assets, and finish your workflow assignments.
- **Top bar** – allows you to access Content Server's Advanced and Dash interfaces; 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.

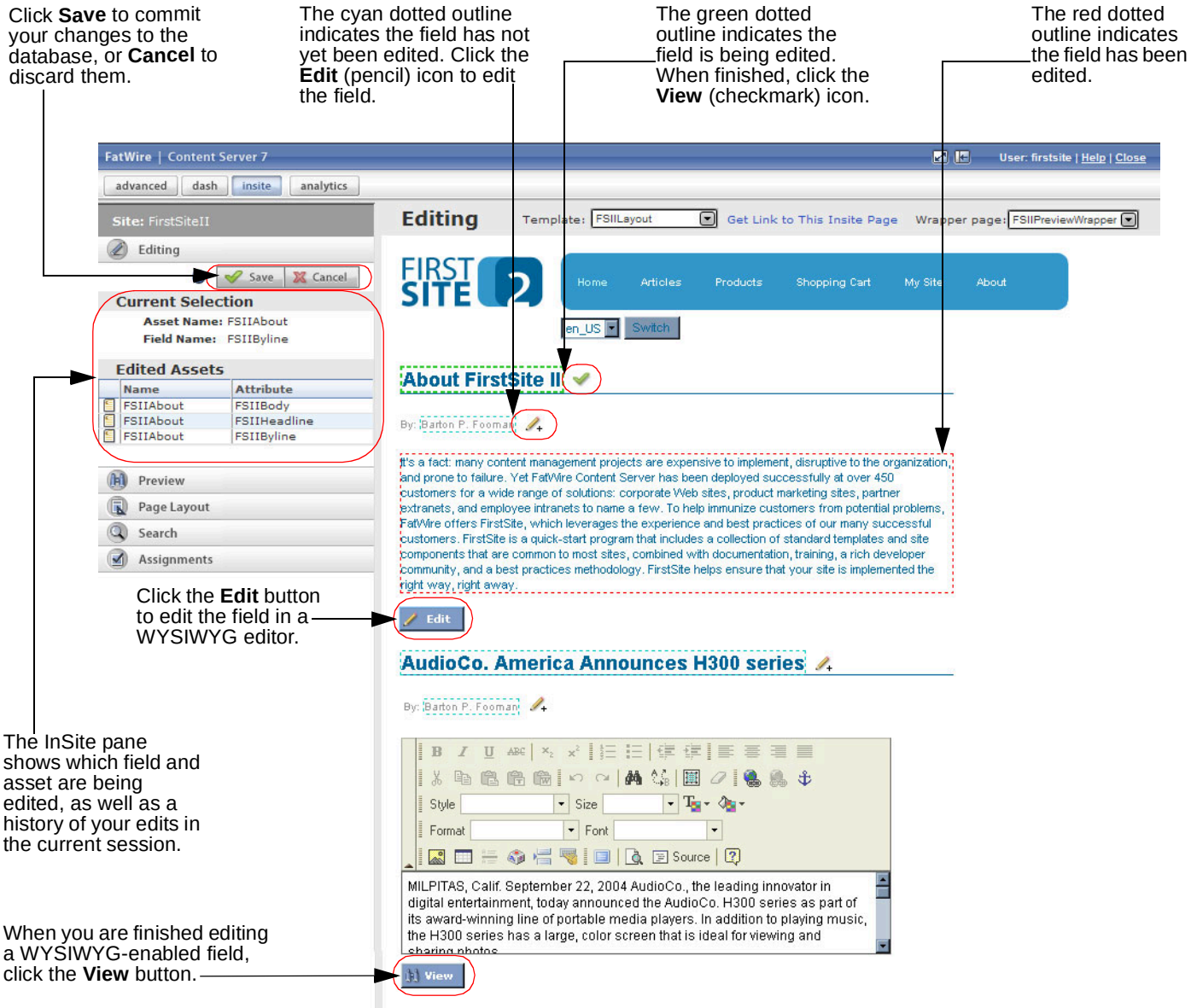
- **InSite bar** – denotes the InSite mode you are working in; allows you to obtain the InSite URL of the displayed asset, and view the asset using alternate templates and wrapper pages.

3. (Optional) If you would like to see how the asset would look when rendered by a different template or wrapper page, select a template from the "Template" drop-down list, and/or a wrapper page from the "Wrapper Page" drop-down list in the InSite bar. Consult your site developers for information on the templates and wrapper pages available to you.
4. 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 105.
   - 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 107.
   - Find other assets to work on in the InSite interface. For instructions, see "Searching for Assets Using the InSite Interface," on page 113.
   - Finish your workflow assignments. For instructions, see "Finishing Your Workflow Assignments Using the InSite Interface," on page 114.
   - Obtain the InSite URL for the asset. For instructions, see "Obtaining the InSite URL for an Asset," on page 116.

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 102.
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** (checkmark) 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 119 for more information.)
   - The **Edit Asset** button next to an image indicates that the image can be edited in the Online Image Editor (OIE). Click the button to open the image asset's "Edit" form in a pop-up window and edit the image in OIE. For instructions, see "Working with the Online Image Editor," on page 122.
   - The **Edit Asset** button next to a piece of Flash content indicates that the content can be edited by following the steps in "Working with Flash Content," on page 125. Clicking the button opens the Flash content asset's "Edit" form in a pop-up window.

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

   Note

   When making your changes, keep the following in mind:

   - The button that invokes the "Edit" form for image and Flash assets in the InSite interface is generated by the `insite:editasset` tag and will display the label chosen by your developers. Our example uses the default label **Edit Asset**.
   - To make your job easier, toggle off the InSite pane to maximize the visible area on the page. Toggle the pane back on when you are ready to commit your changes to the database. (Use the **Toggle InSite Pane** button near the right end of the top bar to toggle the pane off and on).
   - If an editable field is protected by revision tracking, a lock icon replaces the **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 **Save** in the InSite pane to commit your changes to the CS database. If you click **Cancel**, your changes will be discarded and the asset redisplayed in its unmodified state.
7. (Optional) If you would like to work on another asset using the InSite interface, find the asset by performing the steps in "Searching for Assets Using the InSite Interface," on page 113, and repeat this procedure.

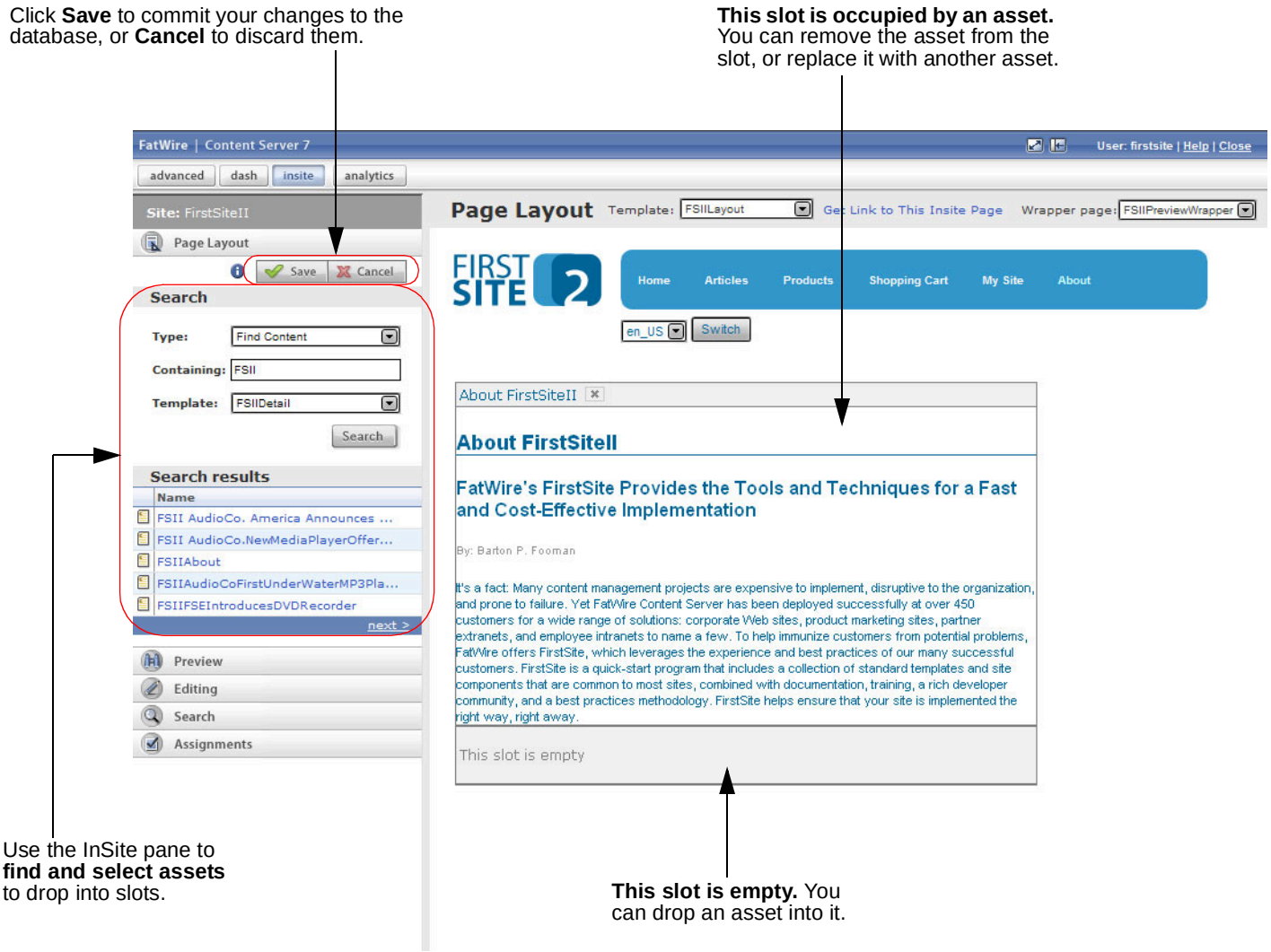
Managing Page Content Using the InSite Interface

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 contains the following procedures:

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

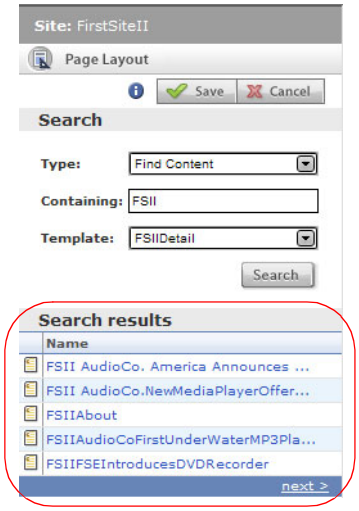
1. Make sure the page you want to work with supports slots. Consult your site designers if you have any questions.
2. Preview the desired page, as described in "Previewing Assets," on page 102.
3. In the InSite pane, click **Page Layout**.

   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 107.
   - If you do not see slots on the page, stop here. The page does not support slots.

   If you have any questions, consult your developers.
4. Find the asset you want to add to or use as a replacement on the page. Do the following in the InSite pane:
   a. In the "Type" drop-down list, select the type of asset you want to find.
   b. In the **Containing** field, enter search criteria describing the asset.
   c. In the "Template" drop-down list, select a template. Only assets to which the selected template is assigned will be returned.
   d. Click **Search**.

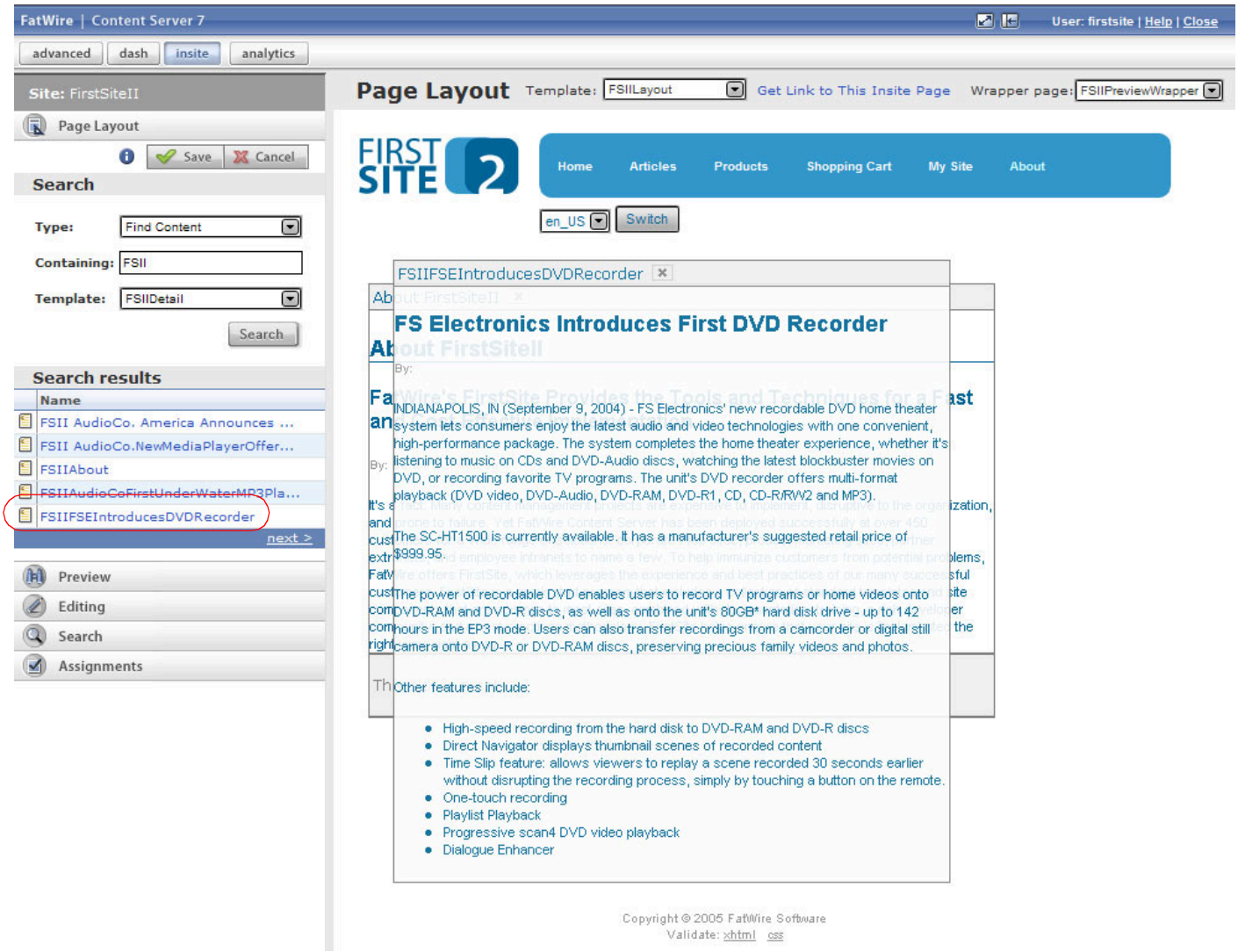
      The results of your search appear in the "Search Results" area of the pane:



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

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

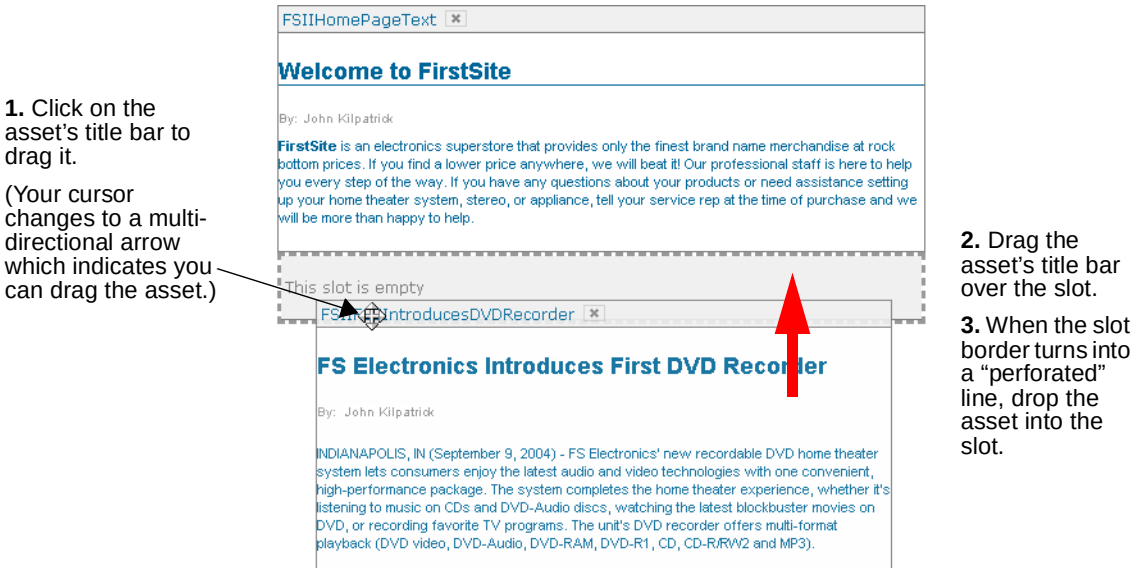
5. In the list of search results, select the asset you want to add to the page.



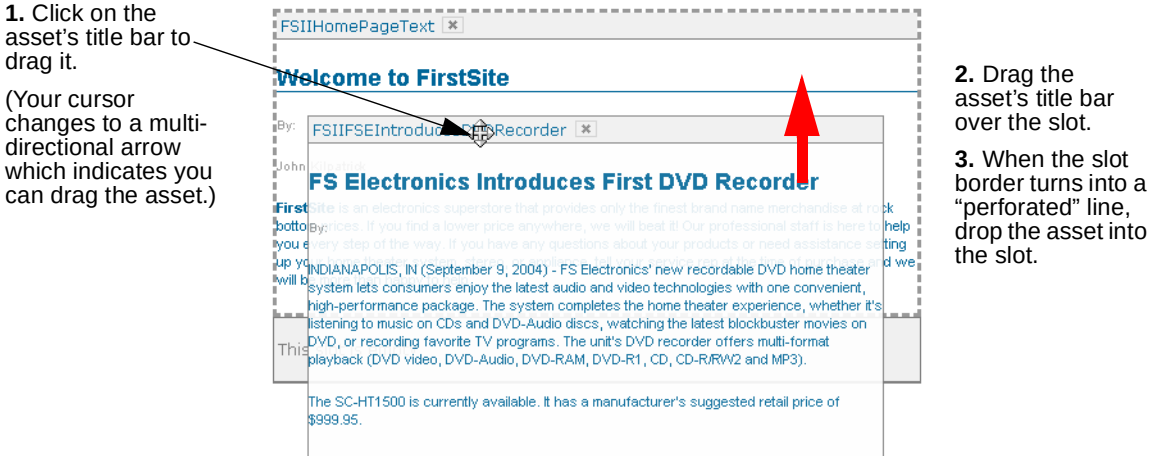
The asset is displayed in its rendered form as a floating object that you can drag and drop into a slot on the page.

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 **Save** to commit your changes to the CS database.

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

   Content Server refreshes the page, showing your changes.

Removing Content from a Page

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

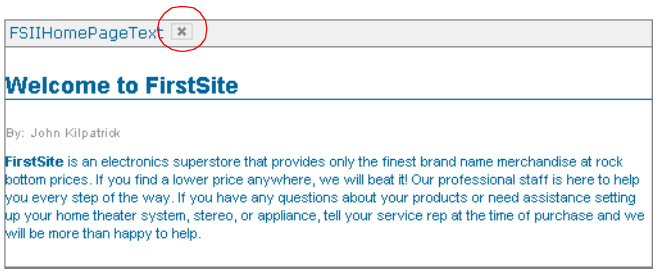
To remove content from a page using the InSite interface

1. Make sure the page you want to work with supports slots. Consult your site designers if you have any questions.
2. Preview the desired page, as described in “Previewing Assets,” on page 102.
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 107.
   - If you do not see slots on the page, stop here. The page does not support slots.

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



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

   If you click **Cancel**, your changes will be discarded and the page redisplayed in its unmodified state.
6. (Optional) If you would like to populate the empty slot with another asset, go to step 4 of “Adding or Replacing Content on a Page,” on page 108.

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

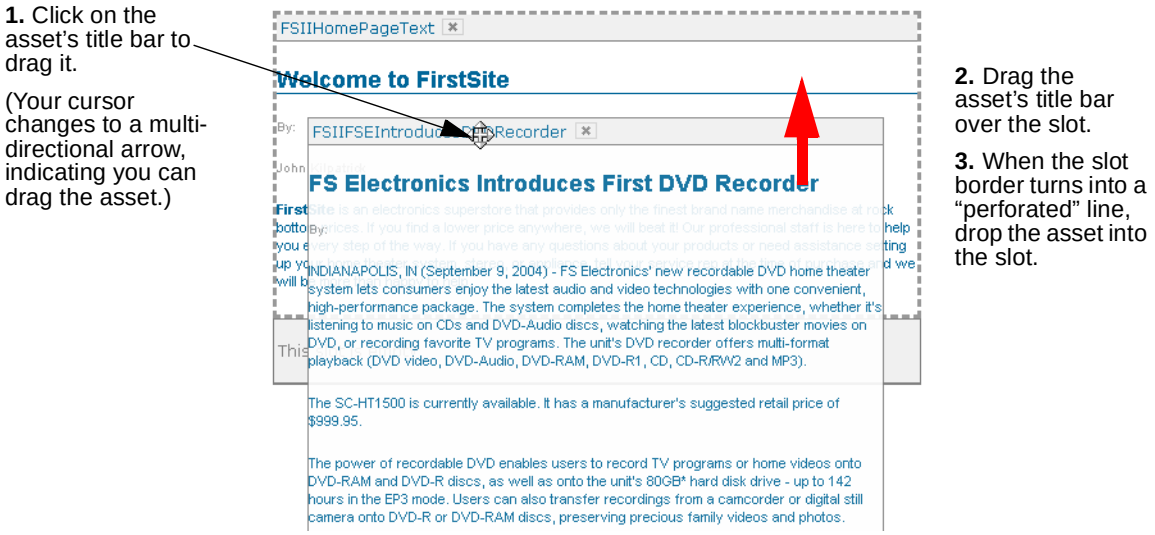
1. Make sure the page you want to work with supports slots. Consult your site designers if you have any questions.
2. Preview the desired page, as described in “Previewing Assets,” on page 102.
3. In the InSite pane, click **Page Layout**.

   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 107.
- 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.



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

Note

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

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

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

   Content Server refreshes the page, showing your changes.

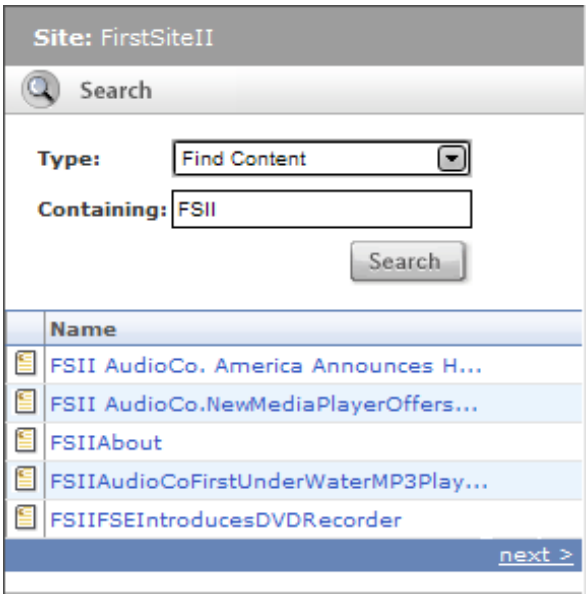
Searching for Assets Using the InSite Interface

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 **Save** 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 **Search**.

   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

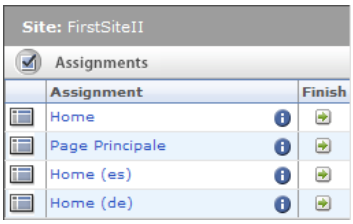
Finishing Your Workflow Assignments Using the InSite Interface

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 13, "Collaborating in Workflow.")

To finish a workflow assignment using the InSite interface

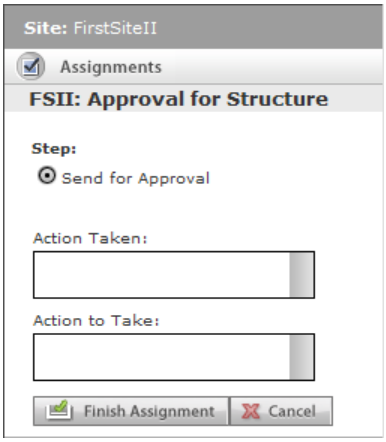
1. (Optional) If you have not already done so, save the changes you have made to the asset you are working on by clicking **Save** in the InSite pane.
2. In the InSite pane, click **Assignments** to expand the **Assignments** section.

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

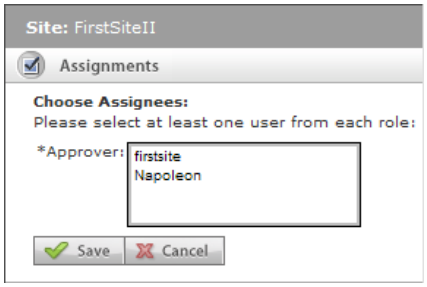


3. (Optional) If you have not yet completed the necessary work on the assigned asset, do the following (otherwise, proceed to the next step):
   a. Hover your cursor over the **Info** (**i**) icon next to the asset's name to see a pop-up description of the work you have been assigned to complete on the asset. (This description has been entered by the previous assignee.)
   b. Select the asset to open it in the InSite interface.
   c. Complete the necessary work on the asset by following the steps in "Editing Assets in the InSite Interface," on page 105 and "Managing Page Content Using the InSite Interface," on page 107, whichever is applicable.
   d. 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, select at least one user for each displayed role, then click **Save**.

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

- **Retain “From” State Assignees** — you keep the assignment as the asset moves to the next state; this allows you to continue working on the asset in that state. You probably know why it is appropriate for you to keep the assignment, but if you don’t, ask your administrator.

- **No Assignments —** as the asset moves to the next state, it remains in the workflow so that function privileges defined for the workflow process are enforced. However, the asset is assigned to no one and participant roles alone (through their assigned function privileges) determine who can work on the asset, and how.
- **Assign To Everyone —** the asset is assigned to all users holding roles participating in the current workflow process.
- **Assign From a List of Participants** — When you (or another user with the appropriate privileges) assign an asset to a workflow, you have the option to decide which participants in each role get the assignment when the asset enters a workflow state requiring those roles. This is the default mechanism for moving an asset through a workflow.
- **Choose Assignees When Step is Taken** — this option is similar to the "Assign From a List of Participants" option described above, but instead of predetermining at the beginning of the workflow who will get the assignment during which workflow state(s), you choose assignees for the next workflow state in real-time each time you take a step. In such case, when you use the **Finish My Assignment** function to take the next step, Content Server prompts you to choose assignees for the asset for the next workflow state by showing a form like the one in step 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 102.
2. In the InSite bar, click **Get Link to This InSite Page**.

   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 10

Working with WYSIWYG Editors

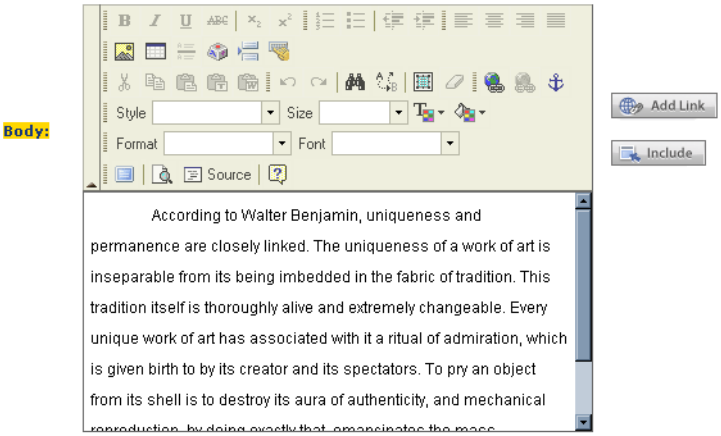
This chapter shows you how to work with the WYSIWYG (What You See Is What You Get) editors that ship bundled with Content Server. This chapter contains the following sections:

Overview

Content Server supports the use of third-party WYSIWYG (What You See Is What You Get) editors on most asset forms. A WYSIWYG editor allows you to see the end-result of your work, including all applicable formatting, directly in the asset form.

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

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



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

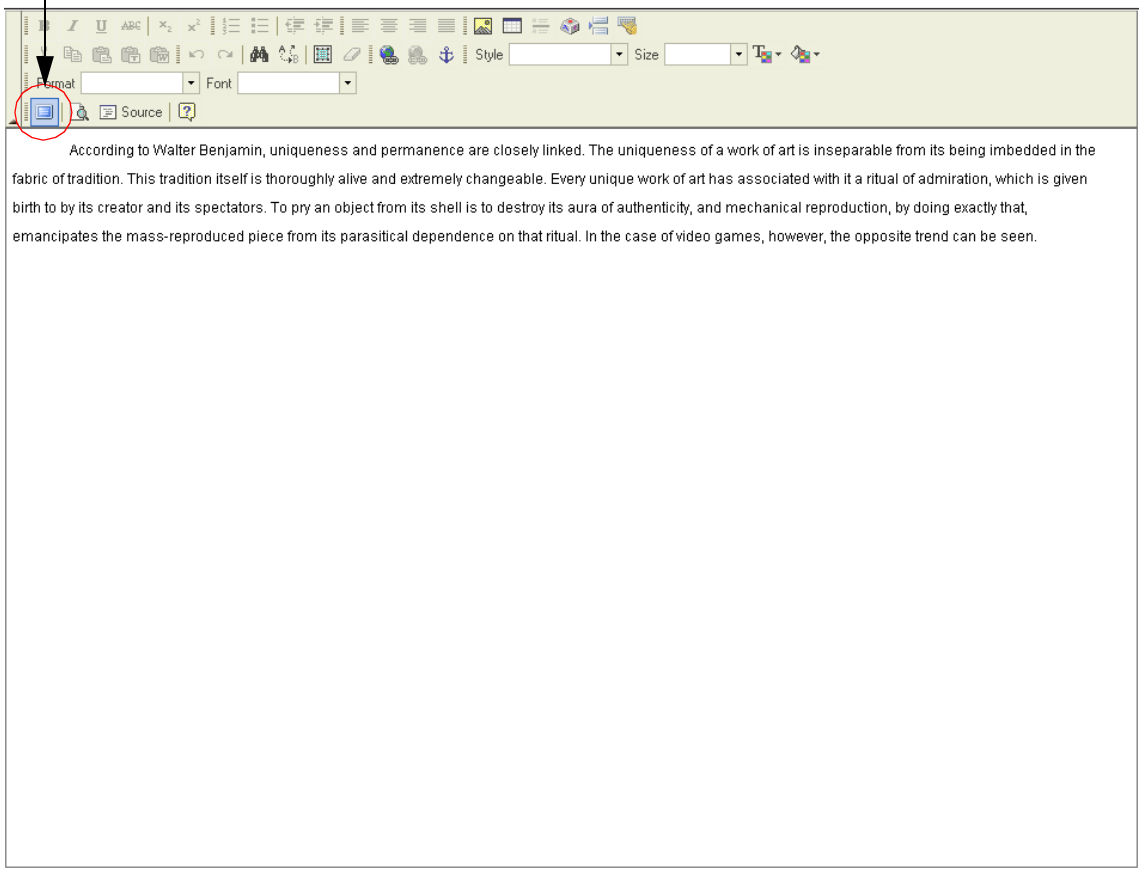
Working with FCKEditor

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

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

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

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



FCKeditor also provides advanced features, such as access to your content's underlying HTML code, and 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`.

Note

On your system, your developers may have chosen to install and configure a different text editor, such as eWebEditPro or RealObjects. Consult your developers to find out which WYSIWYG editor is in use on your site.

Working with the Image Picker

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

Note

When configuring the asset type of the parent asset, your developers decide the following:

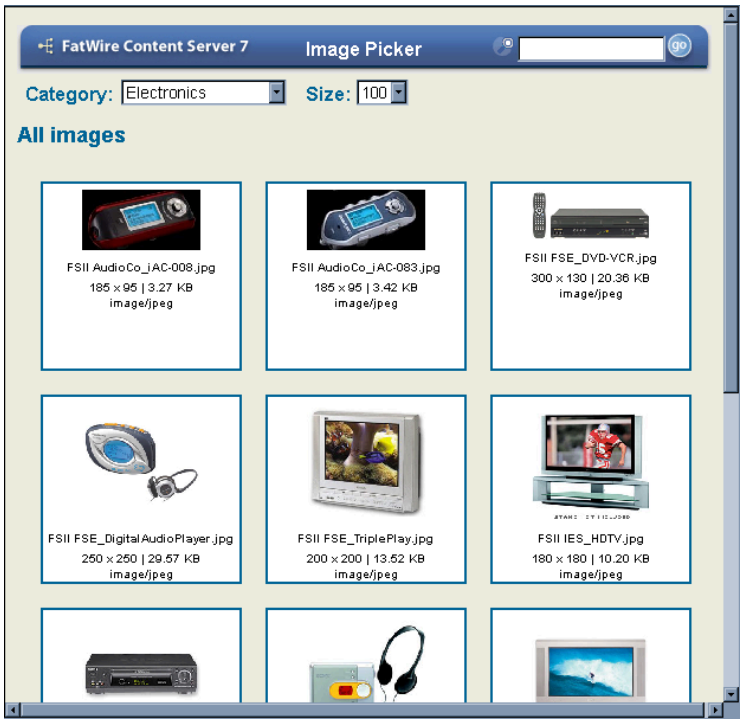
- The fields for which Image Picker is enabled
- The asset type of the image assets displayed by Image Picker

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

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

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

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

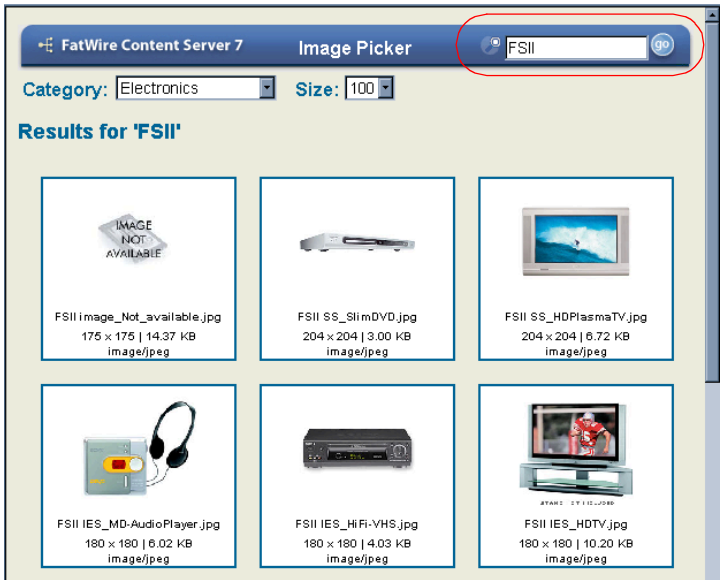


By default, the Image Picker displays all assets of the asset type configured as associable with the parent asset type through the selected field. For each displayed image asset, Image Picker shows a thumbnail of the image, as well as its properties, such as file name, dimensions (in pixels), file size, and MIME type.

2. (Optional) In the “Category” drop-down list, select a category to which you want to restrict the displayed images.

   The Image Picker window refreshes, showing only images that belong to the category you selected.

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



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

   Tip: Hover your cursor over an image to see a larger version.

5. Navigate to the desired image and click it.

   The Image Picker window closes and the image asset you selected is associated with the parent asset. If the field was already populated with an image asset, that asset is replaced by the new asset you selected. A thumbnail of the corresponding image appears in the field you have edited.

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

Working with the Online Image Editor

The Online Image Editor (OIE) is a feature that allows you to compose graphics from images and text directly in an asset's "New" or "Edit" form, or on a rendered page through the InSite interface.

Note

Your site developers enable Online Image Editor on a per-field basis when configuring the asset types for your site.

You compose an image through the following steps:

1. Select a background template. Your site designers create template images that contain placeholders for the foreground image and text you will be adding.
2. Add the foreground image. Depending on how your site is set up, you may choose an image from a pool of images made available to you by your site designers, or upload your own image from your local machine, if allowed by your administrator.
3. Add text and make other edits as necessary.
4. Save the asset. (This automatically combines the template, foreground image, and text into a new flat image, unless the OIE feature has been configured to preserve layers.)

If you have any questions about these steps, consult your site designers or developers.

To compose an image using the Online Image Editor

Note

Before using this feature, make sure that:

- Your developers have coded the asset type to support the image editing functionality
- Your site designers have created the appropriate background and foreground images and made them available to you

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

1. Do one of the following:
   - If you are working in the Portal interface, navigate to the appropriate field in the asset's "New" or "Edit" form.
   - If you are working in the InSite interface, click **Edit Asset** next to the image you want to edit.

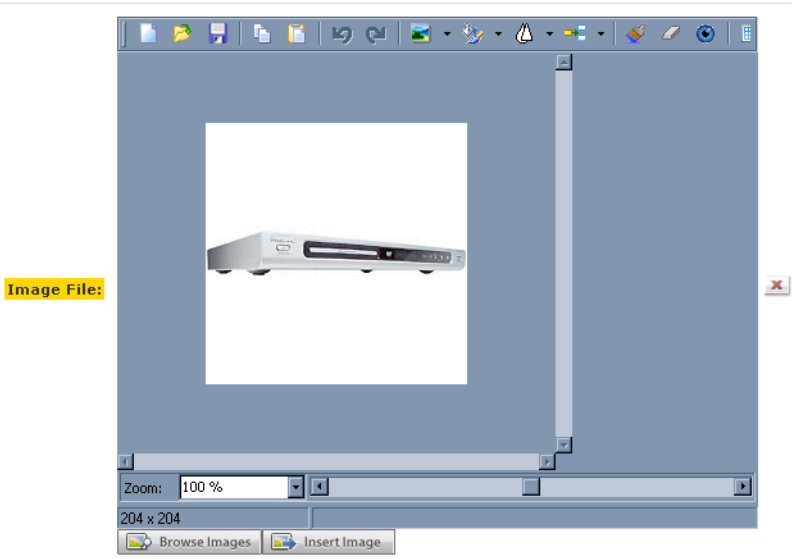
     Note

     The button that invokes OIE in the InSite interface is generated by the `insite:editasset` tag and will display the label chosen by your developers. Our example uses the default label **Edit Asset**.

   The "Edit" form for the selected image asset opens in a pop-up window.

2. If you are using Online Image Editor for the first time on your machine, a dialog box appears prompting you to install the OIE application, `OIE.cab`. Click **Install** and wait until OIE appears in the asset form.

   The Online Image Editor looks similar to the following:



3. Select a background template:

> **Note**
>
> You can clear the canvas at any point by clicking the trash can icon in the upper left corner of the field.

   a. In the selected field, click **Browse Images**.

      The Image Picker opens in a pop-up window.

   b. In the Image Picker window, find and select the desired background template. For instructions, see "Working with the Image Picker," on page 120.

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

> **Note**
>
> The Image Picker displays thumbnails for JPEG and GIF images, but not for OIE (Online Image Editor) files. To view an OIE image, select it and examine it in the OIE window. You can select another background image by repeating step a.

   c. If you determine that the background template you selected is not the best choice, repeat steps a and b to select another template.

4. Add a foreground image:

   - To select an image from a pool of images created by your site designers:

     1) In the selected field, click **Insert Image**.

The Image Picker opens in a pop-up window.

2) In the Image Picker window, find and select the desired foreground image. For instructions, see "Working with the Image Picker," on page 120.

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

3) If you decide that another image is more appropriate, repeat steps 1 and 2 to select another image.

- To select an image stored on your machine (if allowed by your administrator), do the following:

1) Click the **Open** (yellow folder) button in the OIE toolbar.

2) In the "Open File" dialog box, navigate to and select the desired image file. Consult your developers to find out which file formats are accepted.

3) Click **Open**.

5. Position the image over the background template as appropriate. Your site designers might have included a placeholder in the template to aid you in positioning the image.

6. Add text and make other edits as necessary. For instructions on using specific functions, click the **Help** (white question mark) button in the OIE toolbar.

Note

Your developers have the ability to customize the functions available in the OIE toolbar. Consult your developers to find out which OIE functions have been made available to you.

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

- If you are working in the Portal interface, fill in all required fields in the asset form, then click **Save** (or **Save Changes**) to save the asset.
- If you are working in the InSite interface, click **Save Changes**.

Once you save the asset, one of the following happens, depending on how the developers configured the OIE feature:

- If the OIE feature has been configured to save flat images (such as JPEG or GIF), the components you selected (that is, the background, foreground, and text) are combined.
- If the OIE feature has been configured to preserve layers, your work is saved as separate components (background, foreground, text, and any other layers you might have added).

Working with Flash Content

Content Server allows you to compose Flash content directly in an asset's "New" or "Edit" form. You compose Flash Content through the following steps:

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

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

To compose Flash content

Note

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

Before using this feature, make sure that:

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

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

1. Create a new Flash content asset or find and open an existing asset that you want to modify. For instructions, see Chapter 3, "Creating and Editing Structured Content Assets."
2. In the asset form, navigate to the appropriate area. (In our example, the asset form contains a group of fields whose names begin with **Flash**.)
3. Select the Flash template:
   a. In the **FlashTemplate** field in the asset form, click **Browse**.

      Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

   b. In the **Search For** field in the **Search** tab, enter criteria identifying the asset, then click **Search**.

c. In the list of search results, click the desired asset.

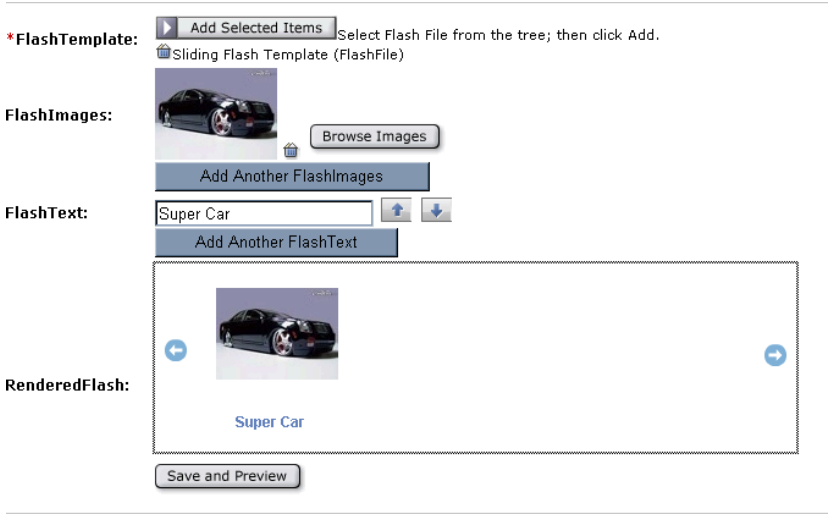
> **Note**
>
> You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

The pop-up window automatically closes.

4. Add an image:
   a. In the **FlashImages** field, click **Browse Images**.

      The Image Picker opens in a pop-up window.
   b. In the Image Picker window, find and select the desired image. For instructions, see "Working with the Image Picker," on page 120.

      When you select the image, the Image Picker window closes.
   c. If you decide that another image is more appropriate, repeat steps a and b to select another image.
5. Enter the supporting text into the **FlashText** field.
6. Click **Save and Preview** to preview the resulting Flash content.



7. (Optional) To add another foreground image and a supporting caption, do the following:
   a. In the **FlashImages** field, click **Add Another FlashImages**.

      A new **FlashImages** field appears in the form.
   b. Repeat step 4 to populate the field with an image.
   c. In the **FlashText** field, click **Add Another FlashText**.

      A new **FlashText** field appears in the form.
   d. In the new **FlashText** field, enter a supporting caption.

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

f. Click **Save and Preview** to preview the resulting Flash content.

8. Fill in all required fields in the form, then click **Save** (or **Save Changes**).

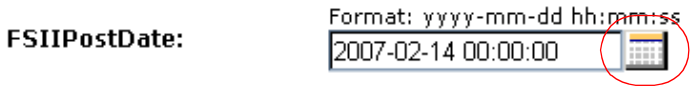
Working with the Date Picker

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).

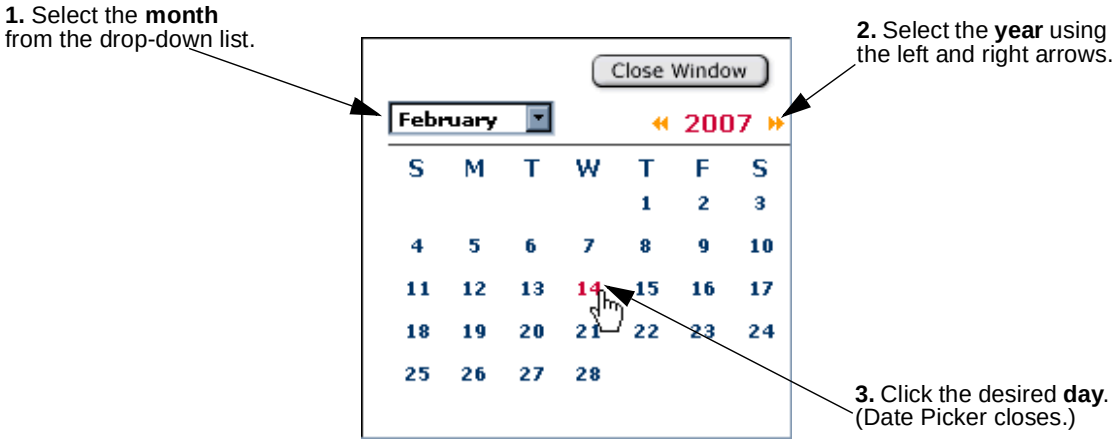
Perform the following steps to enter a date into a field using the Date Picker:

To enter a date using the Date Picker

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



Content Server opens the Date Picker pop-up window.



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

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

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

Chapter 11

Working with Multilingual Assets

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

This chapter contains the following sections:

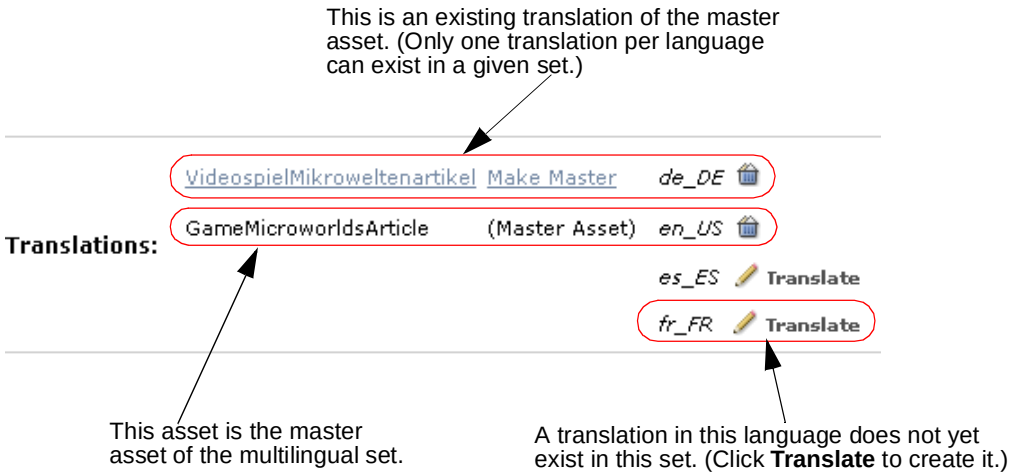
Overview

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

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

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

Each asset can have only one translation in each available language. For example, once a Canadian French translation of an asset exists, you cannot create another Canadian French translation within the same multilingual set. The example below shows the **Translations** field of a typical “Article” asset:



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

1. Select the target language of the translation. Content Server does the following:
   a. Creates a copy of the source asset
   b. Sets the target language of the copy according to your selection
   c. Links the copy to the master asset and marks the copy as a translation of the master. If this is the first translation of the asset, a multilingual set is created and the source asset is designated as the master.
2. Translate the source content and store the translated content in the translation asset.

3. (Optional) Translate the assets associated with the source asset and associate the translated versions with the translation of the source asset. See Table 8 for information on how asset relationships are handled when you create translations of assets.

Table 8: Asset relationship behavior for multilingual assets

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

For more information, see "Working with Asset Associations," on page 142.

Note

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

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

If you have any questions, contact your CS administrator.

This section contains the following procedures:

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

Setting or Changing an Asset's Locale Designation

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

If you want to create a translation of an asset that has no locale designation, follow the steps below, then continue on to step 2 of the next section, "Creating a Translation of an Asset," on page 134.

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

Note

Keep the following in mind:

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

To set or change an asset's locale designation

1. Find the asset whose locale you want to set or change and open its "Edit" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.

      For more information on searching, see the section Chapter 7, "Searching for Assets."
   d. Scroll to the desired asset and click the asset's **Edit** icon.

      Content Server displays the asset's "Edit" form.in a pop-up window.
2. In the "Locale" drop-down list, select the desired locale for the asset.
3. Click **Save**.

Creating a Translation of an Asset

Note

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

- Before you can create a translation of an asset, the asset must have a locale designation already assigned to it. The asset's locale is listed in the **Locale** field of the asset's "Inspect" form and is usually assigned by the user who creates the asset.

  If the asset does not have a locale designation, follow the steps in "Setting or Changing an Asset's Locale Designation," on page 132, then skip to step 1 of this procedure.
- If you are creating the first translation of an asset, you are automatically creating a multilingual set consisting of the source asset and the translation. The source asset will be automatically designated as the master asset of the multilingual set.

  Have the translated content ready before you create the translation asset.

To create a translation of an asset

1. Find the asset for which you want to create a translation and open its "Inspect" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.

      For more information on searching, see the section Chapter 7, "Searching for Assets."
   d. Navigate to the desired asset and click its name.

      Content Server displays the asset's "Inspect" form.
2. Create the translation asset and set its target language. In the **Translations** field, click **Translate** next to the desired target language.

Note

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

Content Server copies the asset, sets the locale of the copy according to your choice from step 2, and displays the copy in a "New" asset form. The form is pre-filled with the content from the source asset.

3. Translate the asset. In the "New" form, do the following:

   a. Enter a name for the translation asset.

   Tip

   It is a good idea to name the new asset in a way that indicates it is a translation of the source asset.

   Note the following conventions when naming the asset:

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

   b. For each field, replace its content with an appropriate translation. When making your changes, you may see one or more of the following types of fields:

   - **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.
   - **WYSIWYG text fields.** You may see one or more text fields that are WYSIWYG-enabled (What You See Is What You Get) via a WYSIWYG editor, such as FCKEditor (see "Working with FCKEditor," on page 119). These text fields allow you to enter and format your content using controls similar to those of Microsoft Word. For more information, see "Overview," on page 118.
   - **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 127 for more information.
   - **Image Picker fields.** You may see one or more fields that prompt you to visually select an image asset to be associated with the asset you are creating. In such cases, you will see a **Browse Image Repository** link next to the field. Clicking the link invokes the Image Picker attribute editor; for more information on Image Picker, see "Working with the Image Picker," on page 120.
   - **Online Image Editor fields.** You may see a field (or fields) that allows you to compose and edit graphics and images directly in the asset form, using the Online Image Editor tool. For detailed instructions, see "Working with the Online Image Editor," on page 122.
   - **Flash content fields.** You may see a section in the asset form that prompts you to compose Flash content from Flash templates, images and text of your choice. For detailed instructions, see "Working with Flash Content," on page 125.

- **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 **Browse** button, proceed to the next step.

  2) Click **Browse**.

     Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

  3) (Optional) In the **Search For** field in the **Search** tab, enter criteria identifying the asset. If you don't enter any criteria, all assets eligible as values for the selected field will be returned.

  4) Click **Search**.

  5) In the list of search results, click the desired asset.

     Note

     You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

     The pop-up window automatically closes.

4. When you are finished, click **Save**.
5. (Optional) If you want to see how the asset would look if it were published, you can preview it. For more information, see "Previewing Assets," on page 102.
6. Review the assets associated with the translation asset you just created to determine which associated assets need to be translated into the target language.

   a. Open the translation asset's "Inspect" form and scroll to the "Related Items" area. Examine the assets associated with the translation you created.

      When you create a translation of an asset, Content Server automatically associates the associated assets of the source asset with the translation asset. Depending on the nature of the associated assets, you may want to translate them and associate the translated versions with the translation asset instead. For example, an image depicting a product might not require a localized version, but a data sheet for the product will need to be translated.

      See Table 8, on page 131 for information on how Content Server handles asset relationships with respect to multilingual assets.

   b. (Optional) If in step a you determined that one or more assets associated with the translation asset have to be translated, repeat steps 1–4 (and, optionally, steps 5–6) of this procedure for each associated asset requiring translation, then follow the steps in "Associating Assets," on page 143 to associate the translated versions with the translation asset. (If an associated asset has its own set of associated assets, repeat step 6 for each asset related to the associated asset.)

7. (Optional) If you want to create additional translations of the source asset, repeat steps 1–6 of this procedure.

Examining the Available Translations of an Asset

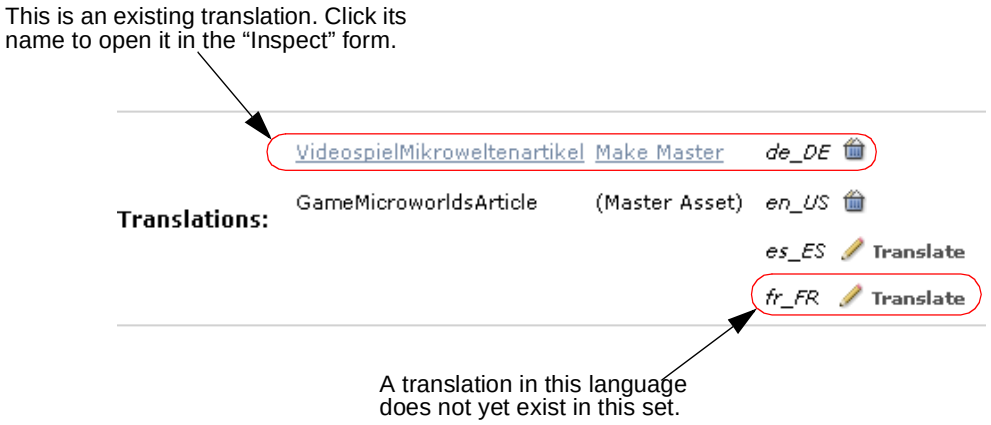
If you want to check if a translation of an asset exists in a specific language, examine the **Translations** field in the asset's "Inspect" form. If the desired translation appears in the field, you can open the translation by clicking its name.

To check whether a specific translation of an asset exists

1. Find the asset whose translations you want to examine and open its "Inspect" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.

      For more information on searching, see Chapter 7, "Searching for Assets."
   d. In the list of search results, navigate to the desired asset and click its name.

      Content Server displays the asset in the "Inspect" form.
2. Examine the **Translations** field to see whether the translation you are looking for exists.



3. (Optional) Click the name of the translation to open it in the "Inspect" form.

Deleting a Translation of an Asset

You can delete a translation of an asset using the asset's "Inspect" form.

To delete a translation of an asset

1. Find the asset whose translation you want to delete and open its "Inspect" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.

      For more information on searching, see Chapter 7, "Searching for Assets."
   d. Scroll to the desired asset and click its name.

      Content Server displays the asset's "Inspect" form.
2. In the **Translations** field, click the **Delete** (trash can) icon next to the translation you want to delete.

   Content Server displays a message asking you to confirm the deletion.
3. If you are sure you want to delete the translation asset, click **Delete This Item**. Otherwise, click **Cancel**.

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

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

Changing the Master Asset of a Multilingual Set

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

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

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

Note

If a multilingual set is being revision-tracked, you must manually check out all members of the set before you can change the set's master asset. For instructions, see "Checking Out an Asset," on page 184.

To change the master asset of a multilingual set

1. Find the master asset of the multilingual set and open its "Inspect" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.

      For more information on searching, see Chapter 7, "Searching for Assets."
   d. Navigate to the desired asset and click its name.

      Content Server displays the asset's "Inspect" form.
2. In the **Translations** field, click **Make Master** next to the translation you want to designate as the new master asset of the multilingual set.

Chapter 12

Advanced Content Management Features

This chapter shows you how to work with advanced content management features such as asset associations, embedded links, asset sharing across sites, and grouped assets.

This chapter contains the following sections:

Working with Asset Associations

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

Named Associations

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

For example, the “Article” asset type included in the Burlington Financial sample site contains a predefined association with “ImageFile” assets — when you select an “ImageFile” asset in the **Main Image** field of the “Article” asset, the selected “ImageFile” asset becomes a child of the “Article” asset (its parent). This does not, however, prevent that “ImageFile” asset from becoming a child of other assets. For example, an asset association field in a typical “Article” 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 **Related** area in the asset’s “Edit” form will show only the named associations applicable to the asset type and subtype chosen in the association. Because an asset subtype can be specific to a particular CS site, this mechanism can be used to make asset associations site-specific as well.

Note

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

Unnamed Associations

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

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

Note

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

Associating Assets

To associate an asset with another asset

This procedure uses the Spark sample site as an example and assumes that an association between the "Spark Job" (parent) and "Spark Contact" (child) asset types has already been created.

1. Create a new asset or edit an existing asset with which you want to associate another asset. For instructions, see one of the following chapters:
   - Chapter 3, "Creating and Editing Structured Content Assets"
   - Chapter 5, "Creating and Editing Document Assets and Folders"
2. Once the parent asset's "New" or "Edit" form loads, associate the child asset(s) with your parent asset by doing one of the following, depending on the type of associations supported by the parent asset:

   If the parent asset supports named associations:

   a. Scroll to the **Related** area of the parent asset's "New" or "Edit" form.

   b. In the **Related** area of the parent asset's form, click **Browse** next to the appropriate related asset field (**Main Image** in this example). (Each named association available to your parent asset is represented by a separate field with its own **Browse** button.)

   Content Server displays a pop-up window that allows you to find and select the desired child asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

   c. In the **Search For** field in the **Search** tab, enter criteria identifying the asset and click **Search**.

d. In the list of search results, click the desired asset.

> **Note**
>
> You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

The pop-up window automatically closes and Content Server populates the selected association field with the asset you chose.

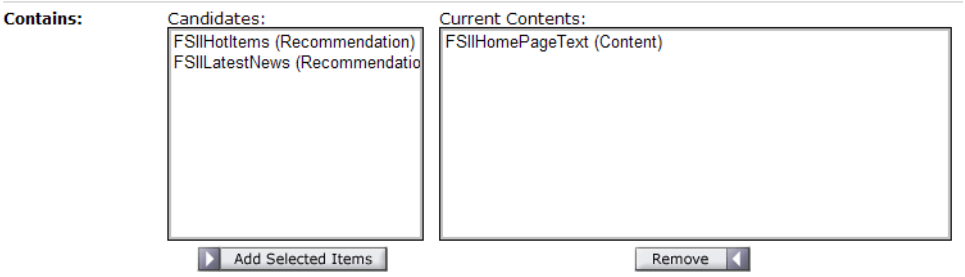
If a related asset field already references a specific child asset, the current child asset is replaced with the new child asset you selected.

e. Repeat steps b–d to associate more child assets, as necessary.

If the parent asset supports unnamed associations:

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

a. Scroll to the **Contains** field of the asset form.



b. In the **Candidates** list, select the assets you want to associate with the parent asset. To select more than one asset, **Ctrl-click** each desired asset in the list. You can also select a range of assets by **Shift-clicking** the first and last assets in the range.

c. Click **Add Selected Items**.

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

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

Disassociating Assets

To disassociate an asset from another asset

1. Find the desired parent asset and open its "Edit" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the desired parent asset.
   c. Enter the desired search criteria (if any) and click **Search**.
   d. In the search results list, navigate to the desired parent asset and click its **Edit** icon.

      For more information on searching, see Chapter 7, "Searching for Assets."
2. Once the parent asset's "Edit" form loads, disassociate the child asset(s) from your parent asset by doing one of the following, depending on the type of associations supported by the parent asset:

   If the parent asset supports named associations:

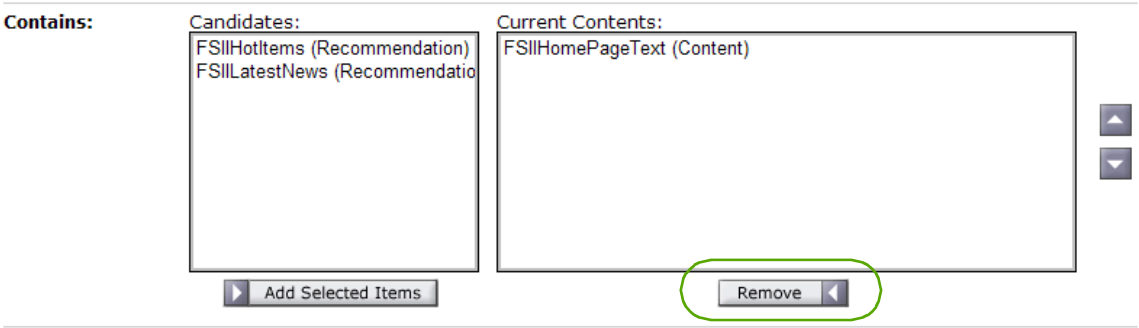
   a. Scroll to the **Related** area of the parent asset's "Edit" form.
   b. Click the **Delete** (trashcan) icon next to the appropriate related asset field. The name of the currently associated child asset is displayed in the field:

      Each asset type that can be associated with your parent asset is represented by a separate field with its own **Delete** icon.
   c. Repeat step b to disassociate other child assets from the parent asset, as necessary.

If the parent asset supports unnamed associations:

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

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



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

c. Click **Remove**.

3. Click **Save**.

Embedding Links Within Assets

When creating and updating assets, you may need to:

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

The extent to which these capabilities are available to you depends on how your site designers have implemented them as part of the custom asset design. For example, the "Article" asset type that ships with the Burlington Financial sample site supports all three types of embedded links in its **Body** field. The following subsections describe how to use embedded links within the context of the Burlington Financial "Article" asset.

Embedding an Internal Link

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

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

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

1. Expand the "Find Content" or "Find Documents" portlet.
2. In the "Search" form, select the asset type of the asset you want to find.
3. Enter the desired search criteria (if any) and click **Search**.
4. In the search results list, navigate to the asset(s) you want to add to your Active List, and select the box next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)

   Note

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

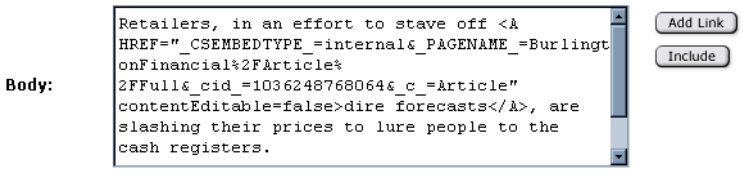
5. When you have selected your assets, click **Add To My Active List**.

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

1. Find the asset into which you want to embed an internal link and open its "Edit" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.
   d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

   You can also embed an internal link in a new asset when populating its "New" form.
2. In the desired field (**Body** field in this example), select the text that you want to be hyperlinked. Alternatively, you can type new text anywhere in the field and select it.
3. Click the **Add Link** button to the right of the field. A pop-up window appears, listing the assets present in your Active List.
4. In the pop-up window, click the desired asset.

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



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

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

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

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

   If you cancel instead, the link is removed from the contents of the field.
6. Preview the asset to view and test the embedded link. (For instructions, see "Previewing Assets," on page 102.) The content should appear with a hyperlink to the asset that you embedded. Clicking the link displays the asset in the selected template.

Embedding an External Link

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

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

Note

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

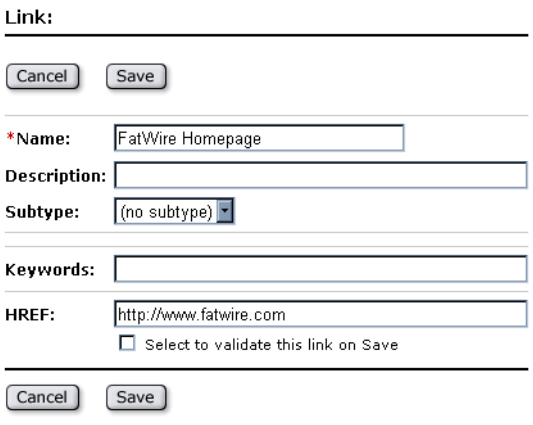
Before you can embed an external link into an asset, you should place the corresponding “Link” asset in your Active List for easy retrieval during the linking process.

1. Expand the “Find Content” or “Find Documents” portlet.
2. In the “Search” form, click **Find Link**.
3. Enter the desired search criteria (if any) and click **Search**.
4. In the search results list, navigate to the asset you want to add to your Active List, select the box next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)
5. When you have selected your asset, click **Add To My Active List**.

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

1. Expand the “Create Content” portlet.
2. In the “Create Content” portlet, click **New Link**.

   Content Server displays the “New Link” asset form:



3. In the “New Link” asset form, populate the appropriate fields. If you want Content Server to validate the URL you entered in the **HREF** field, select the **Select to validate this link on Save** box.

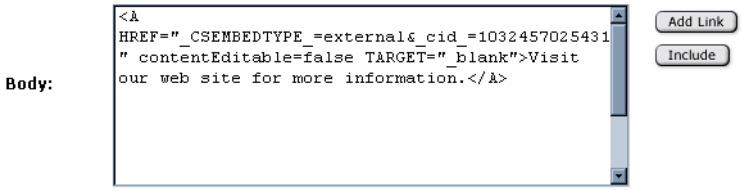
4. Click **Save**. If you chose to have Content Server validate the URL you entered in the form, Content Server also displays a message indicating the result of the validation.
5. In the action bar of the "Inspect" form, click **Add to My Active List** to add the "Link" asset you just created to your Active List. You will select this "Link" asset from your Active List when embedding a link to the desired external page into your asset, as described in the next procedure.

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

1. Find the asset into which you want to embed an external link and open its "Edit" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.
   d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

   You can also embed an external link in a new asset when populating its "New" form.
2. In the desired field (**Body** field in this example), select the text that you want to be hyperlinked. Alternatively, you can type new text anywhere in the field and select it.
3. Click the **Add Link** button to the right of the field. A pop-up window appears, listing the assets present in your Active List.
4. In the pop-up window, click the desired "Link" asset.

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



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

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

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

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

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

6. Preview the asset to view and test the embedded link. (For instructions, see "Previewing Assets," on page 102.) The content should appear with a hyperlink to the URL you embedded. Clicking the link opens the linked web page in a separate browser window. If you remove `TARGET="blank"` from the embedded string, the web site opens in the current browser window.

Embedding the Contents of an Asset

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

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

Note

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

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

1. Expand the "Find Content" or "Find Documents" portlet.
2. In the "Search" form, select the asset type of the asset(s) you want to find.
3. Enter the desired search criteria (if any) and click **Search**.
4. In the search results list, navigate to the asset(s) you want to add to your Active List and select the check box(es) next to it. (You can select the boxes for all of the assets you want to add to your Active List to add them all at once.)

   Note

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

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

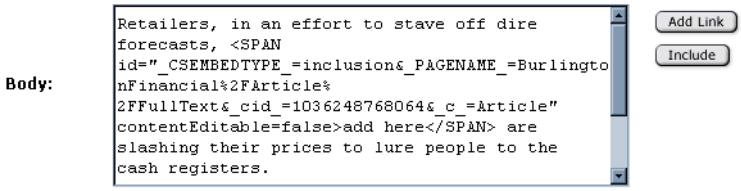
To embed another asset's contents in the text field of an asset

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

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

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

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



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

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

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

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

Sharing Assets with Other Sites

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

Before you share an asset, consider the following:

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

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

To share an asset

1. Find the asset you want to share:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to share.
   c. Enter the desired search criteria (if any) and click **Search**.

   For more information on searching, see Chapter 7, "Searching for Assets."
2. In the search results list, navigate to the asset you want to share and click its **Inspect** icon. Content Server displays the asset's "Inspect" form.
3. In the action bar, select **Share *asset type*** from the drop-down list.
4. In the "Share" form, select the names of the sites to which you want to share the asset.
5. Click **Save Changes**.

Working with Grouped Assets

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

Working with Collections

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

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

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

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

Note

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

Building a Collection

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

To build a collection

1. Find the collection you want to build:
   a. Expand the “Find Content” portlet.
   b. In the “Search” form, select **Find Collection**.
   c. Enter the desired search criteria (if any) and click **Search**.

   For more information on searching, see the section Chapter 7, “Searching for Assets.”

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

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

Build Collection:Analyst Home Stories

Cancel Save Changes

Current Articles

Rank	Remove	Name	Description
1	☐	Aetna-A446-2001Mar9	Aetna Reports Second Quarter 2000 Earnings
2	☐	Metlife-A698-2001Mar9	Metlife Q2 Earnings Climb 18%, Led by Retail Products
3	☐	Wal-Mart-A706-2001Mar9	Wal-Mart Reports Record Sales And Income for the Second Quarter

Query 1: My Active List Articles

Rank	Name	Locale	Headline	Modified
	100-A637-2001Mar9		100 Blank Passports Still Missing in D.C.	Mar 18, 2001
	ASP-A56-2001Mar9		An Asp Opportunity for Java Developers	Mar 18, 2001
	About Burlington Financial		About Burlington Financial	Jan 23, 2002
	AMD-A580-2001Mar9		AMD Completes Sale of Communications Business	Mar 18, 2001

Query 2: Main Stocks Query

Rank	Name	Locale	Headline	Modified
	Mutual fund fee		Try to Avoid 21d-2 Fees	Jun 20, 2001
	Bear market funds		Find Out What Funds Work Best When the Market Declines	Jun 20, 2001
	Mutual funds minimum		It Doesn't Take Much to Get Started Your Mutual Fund Investment	Jun 20, 2001
	Singapore-A42-2001Mar9		Singapore Stocks Review: Close 1.1% Higher, Tracking U.S. Trend	Mar 13, 2001

Query 3: Companies Query

Rank	Name	Locale	Headline	Modified
	Broadcom-A652-2001Mar9		Broadcom Buys Silicon Spice	Mar 27, 2001
	Fry-A448-2001Mar9		Fry's Launches Web Site to Sell DSL Service	Mar 27, 2001
	Singtel-A603-2001Mar9		Singtel Buys Into India's Bharti Group	Mar 27, 2001
	Go-A302-2001Mar9		Go.Com Beats Street After the Bell	Mar 27, 2001
	Bakbone-A164-2001Mar9		Bakbone's Netvault Makes North American Debut	Mar 9, 2001

Cancel Save Changes

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

   Note

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

5. Click **Save Changes**.

Working with Recommendations

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

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

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

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

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

- Create Dynamic List recommendations. Unlike Static List and Related Items recommendations, the functionality of Dynamic List recommendations is defined by customized code written by your developers. Because of that, Dynamic List recommendations are the most flexible out of the three types of “Recommendation” assets in terms of fulfilling specific business needs. For example, your developers can code a Dynamic List recommendation to behave like a Related Items recommendation, but instead of requiring the related assets be linked manually, the recommendation can track the movies a visitor has bought in the past and recommend movies that most closely match his or her past purchases in terms of theme or genre. In such case, you would simply assign the recommendation to the assets you want to be included in the recommendation.

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

Note

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

To learn how to create “Recommendation” assets, see Chapter 18, “Creating and Configuring Recommendations.”

Chapter 13

Collaborating in Workflow

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

This chapter shows you how to participate in workflow by using various workflow functions (for example, placing assets in workflow or completing your assignments).

This chapter contains the following sections:

Overview

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

For a detailed overview of workflow, consult the workflow chapter in the *Content Server Advanced Interface User's Guide*.

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.*

Viewing Your Assignment List

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

Note

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

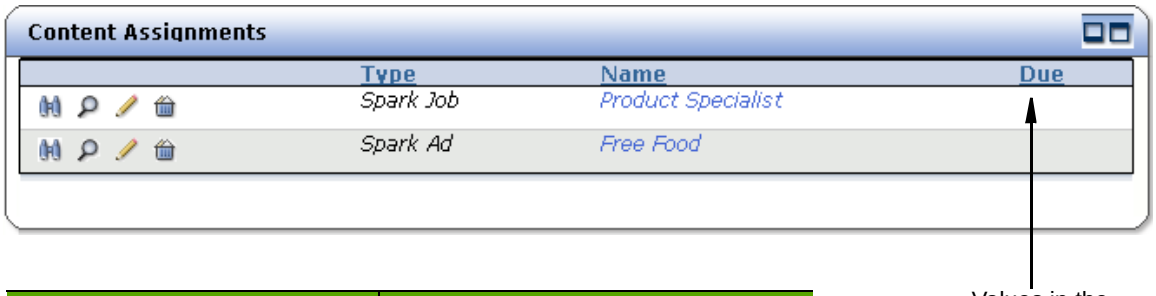
Your access to these portlets depends on the permissions granted to you by your administrator.

To view your assignment list

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

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

The Portal interface displays a list of all the assets that are assigned to you. Each asset is identified by its name, type, and the due date for the assignment.



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

Color/Symbol	Status of the Assignment
Black	Due within the time shown
Orange	Due in less than 24 hours
Bold orange	Due in less than 1 hour
Bold red with plus sign (+)	Overdue by the time shown

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

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

3. When you are finished, save the asset.

Using Workflow Functions

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

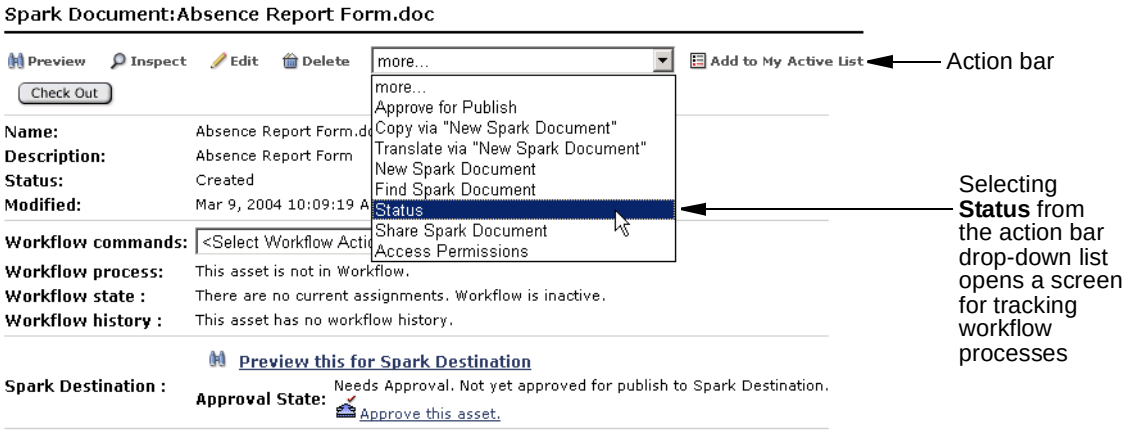
- Finishing an Assignment
- Setting an Assignment Deadline for an Asset
- Removing an Asset from Workflow
- Assigning an Asset to a Workflow
- Showing an Asset's Participant List
- Setting Workflow Participants
- Setting a Process Deadline for an Asset
- Delegating Assignments
- Abstaining from Voting

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

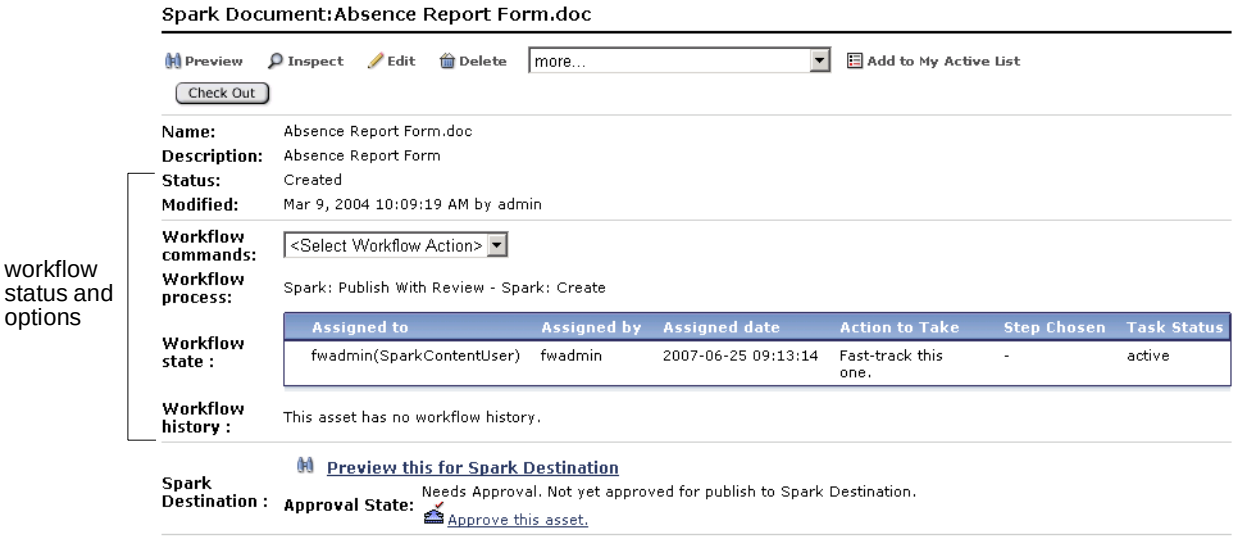
To select workflow options

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

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



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



4. In the "Workflow commands" drop-down list, select one of the options listed in Table 9, on page 164 (depending on the action you want to take) and go to the cited page for instructions on completing the option.

Note

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

Table 9: Workflow options

Workflow Options	To complete an option, go to...
Finish My Assignment	step 3 on page 165 in "To finish an assignment"
Set Assignment Deadline	step 5 on page 167 in "Setting an Assignment Deadline for an Asset"
Remove from Workflow	step 6 on page 168 in "Removing an Asset from Workflow"
Select Workflow	step 5 on page 170 in "To assign an asset a workflow"
Show Participants	step 4 on page 171 in "To show the list of workflow participants"
Set Participants	step 5 on page 172 in "To set workflow participants"
Set Process Deadline	step 5 on page 173 in "To set a process deadline for an asset"
Delegate Assignment	step 5 on page 174 in "To delegate an assignment"
Abstain from Voting	step 5 on page 175 in "To abstain from voting on an assignment"

Finishing an Assignment

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

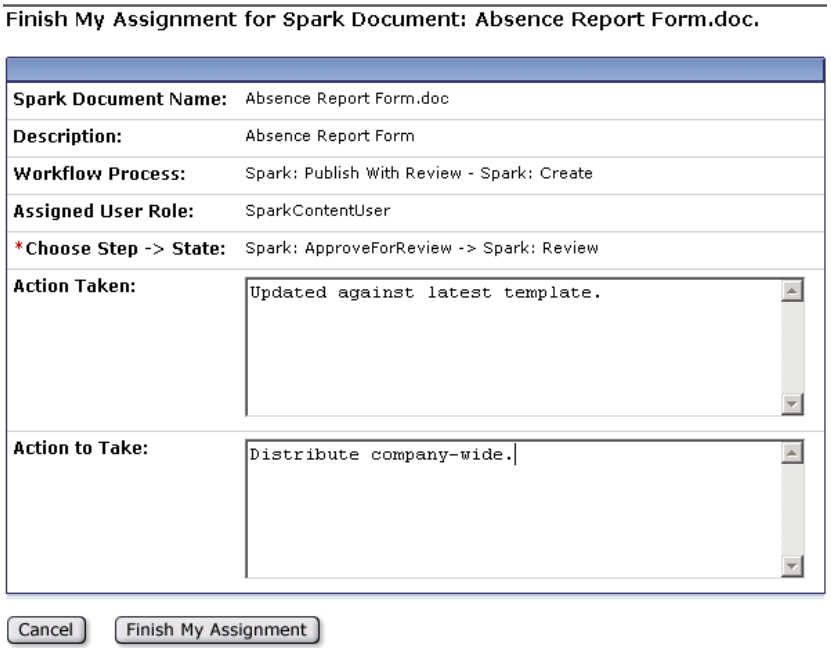
Note

The term "finish an assignment" has a specific meaning for Content Server's content providers. For more information, see "Viewing Your Assignment List," on page 160.

To finish an assignment

1. Maximize the "Content Assignments" or "Document Assignments" portlet (if it is not already maximized).
2. Click the **Finish** button next to the asset.

3. In the form “Finish My Assignment,” do the following:



   a. In the **Choose Step -> State** field, note the possible next steps and the states they lead to. When the option is available, select the next step and state for the asset.

   b. In the **Action Taken** field, type a short description of the work that you completed on the asset.

   c. In the **Action to Take** field, type a short suggestion for the next person who will work with the asset.

   d. In the **Assignment Deadline** field (if displayed):

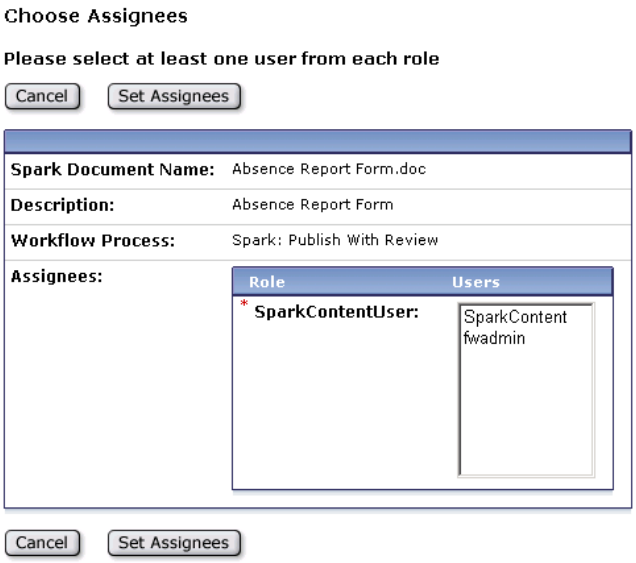
      “Assignment Deadline” is used to override the time allotted for the next assignment. Use “Assignment Deadline” to enter a date in the prescribed format. If you do not enter a specific date, the assignment is due within the time set by the next state.

4. Click **Finish My Assignment**.

5. If the asset is associated with a workflow that requires assignee selection, the “Choose Assignees” screen is displayed. If the “Choose Assignees” screen is not displayed, proceed to step 6.

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

In the “Choose Assignees” screen, do the following:



a. Go to the “Assignees” panel, and in the “Users” menu, select the users whom you want as assignees to receive the assignment. To select a block of users, **Ctrl-Shift-click** the extremes of the block. To select non-adjacent users, **Ctrl-click** each user.

b. Click **Set Assignees**.

6. In the asset’s “Inspect” form, go to the “more...” drop-down list and select **Status**. The action *taken* is visible in the **Workflow history** summary. The action *to take* is visible in the **Workflow state** summary.

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

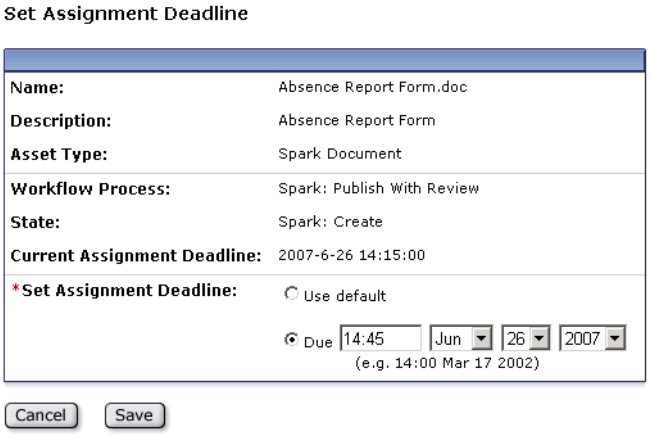
Setting an Assignment Deadline for an Asset

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

To set an assignment deadline for an asset

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

4. In the "Workflow commands" drop-down list, select **Set Assignment Deadline**.

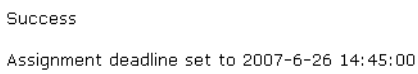


5. In the "Set Assignment Deadline" form, do one of the following:
   - Select **Use default** to set the assignment deadline to what was specified by your CS administrator in the state definition.
   - Select **Due** and enter the time in the first field. Select the month, day, and year from the remaining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

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

6. Click **Save**.

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



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

- Assigning an asset a workflow in the Portal interface (see "Assigning an Asset to a Workflow," on page 169)
- Finishing an assignment (see "Finishing an Assignment," on page 164)

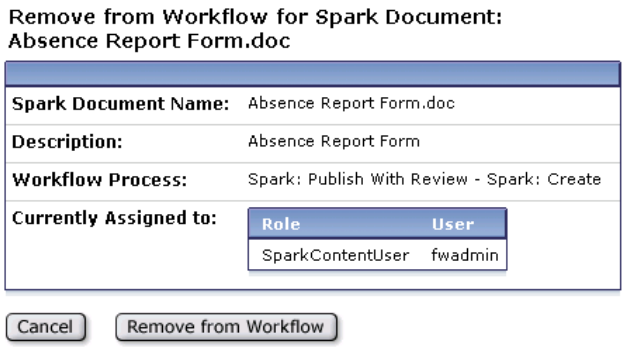
Removing an Asset from Workflow

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

To remove an asset from workflow

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

   The following form appears:



6. Click **Remove from Workflow**.

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

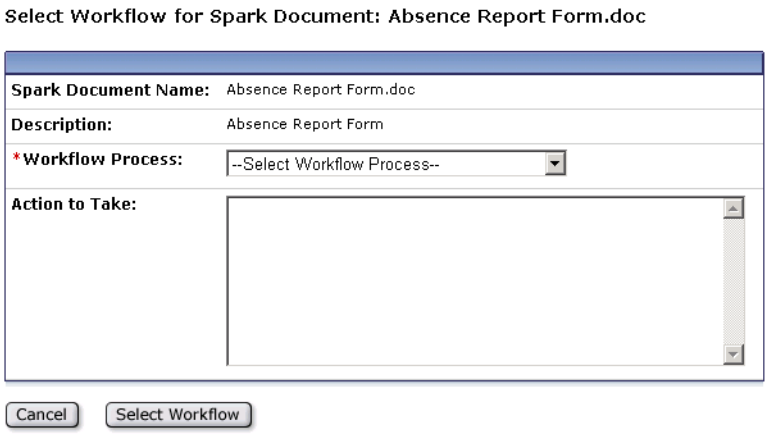
Assigning an Asset to a Workflow

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

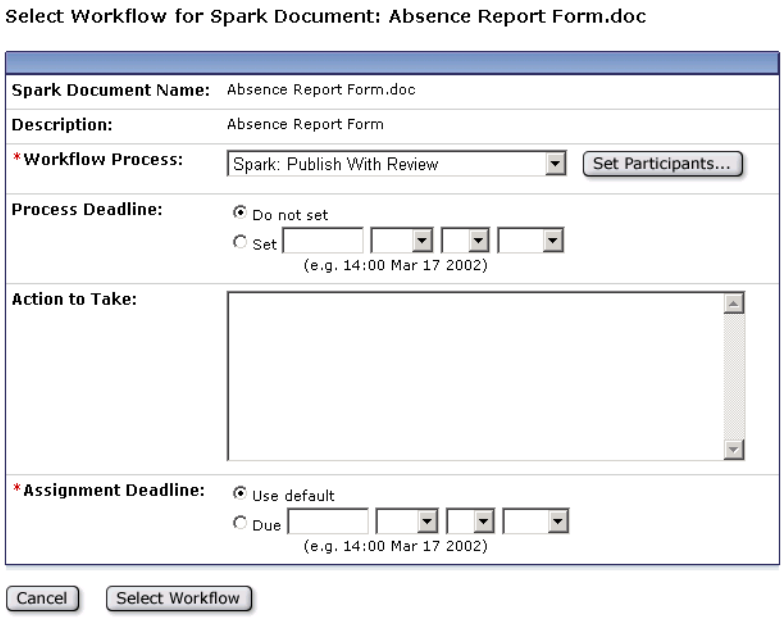
To assign an asset a workflow

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

   The "Select Workflow" form similar to the following opens:



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



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

   This feature appears only if enabled by the workflow administrator, and is available only if your user role is assigned as an administration role for the workflow process, or you otherwise have the right privileges. For more information, see “Setting an Assignment Deadline for an Asset,” on page 166.
9. (Optional) Set a **Process Deadline** date by which the assigned asset is to complete the workflow process, using the prescribed format.

   This feature appears only if enabled by the workflow administrator, and is available only if you have the assigned administrator role for the workflow process, or if you otherwise have the right privileges. For more information, see “Removing an Asset from Workflow,” on page 168.
10. When you are finished filling in the form, click the **Select Workflow** button.

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

Showing an Asset's Participant List

To show the list of workflow participants

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

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

Show Participants
Spark Document: Absence Report Form.doc

Step	Users Authorized	Users Notified
Spark: Revise	SparkContent, fwadmin	SparkContent, fwadmin
Spark: Reject For Editing	SparkContent, fwadmin	SparkContent, fwadmin
Spark: Publish	SparkContent, fwadmin	SparkContent, fwadmin
Spark: ApproveForReview	SparkContent, fwadmin	SparkContent, fwadmin
Spark: Start Workflow	SparkContent, fwadmin	SparkContent, fwadmin

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

Setting Workflow Participants

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

To set workflow participants

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

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

Note

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

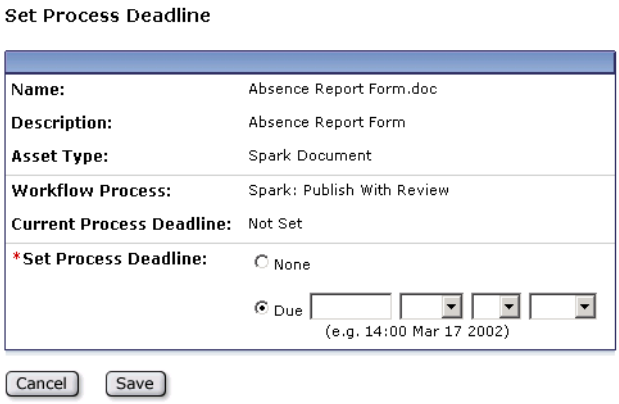
Setting a Process Deadline for an Asset

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

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

To set a process deadline for an asset

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



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

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

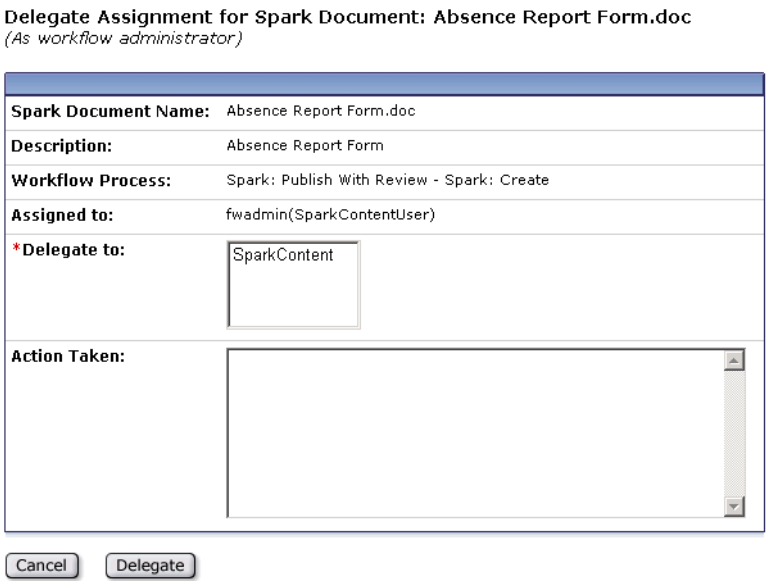
Delegating Assignments

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

To delegate an assignment

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

   The "Delegate My Assignment" form appears:



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

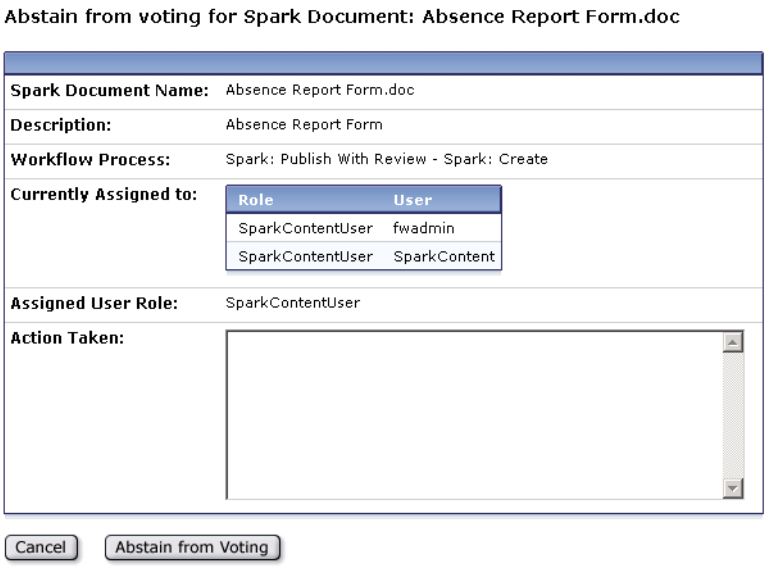
Abstaining from Voting

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

To abstain from voting on an assignment

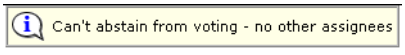
1. Find the asset in the Portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, go to the "more..." drop-down list and select **Status**.
4. In the "Workflow commands" drop-down list, select **Abstain from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

   The "Abstain from Voting" form appears:



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

   A confirmation message of the abstention appears at the top of the "Status" form, and the Workflow state and Workflow history on the form are updated accordingly. Note that abstaining does not remove the assignment from your assignments list.
6. If you are the only (or the only remaining) participant in this role, you cannot abstain, as denoted by the following message:

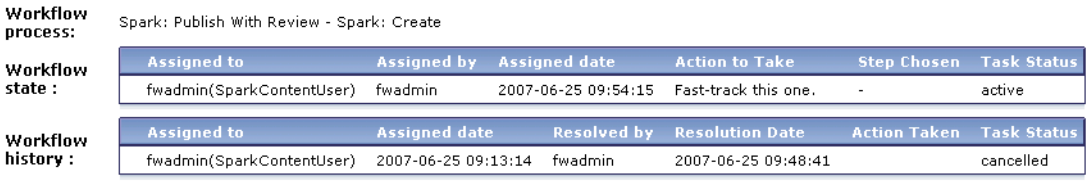


   You must find some other means of dealing with this assignment.

Examining an Asset's Workflow Progress

To examine an asset's workflow progress

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



Workflow process: Spark: Publish With Review - Spark: Create

Workflow state :

Assigned to	Assigned by	Assigned date	Action to Take	Step Chosen	Task Status
fwadmin(SparkContentUser)	fwadmin	2007-06-25 09:54:15	Fast-track this one.	-	active

Workflow history :

Assigned to	Assigned date	Resolved by	Resolution Date	Action Taken	Task Status
fwadmin(SparkContentUser)	2007-06-25 09:13:14	fwadmin	2007-06-25 09:48:41		cancelled

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

Table 10 defines the columns in "Workflow state" and "Workflow history."

Table 10: "Workflow state" and "Workflow history" column definitions

Column	Definition
Assigned To	The user names of the persons that the asset has been assigned to. Note that the user's role appears in parentheses following the user name.
Assigned By	The user name of the person who finished working with the asset. If the asset is in its initial workflow state, this column shows the user name of the person who assigned the asset to a workflow process.
Assigned Date	The date and time the asset was assigned to the user.
Action to Take	Instructions from the user who assigned the asset (if that person entered instructions in the form; appears as No Comment otherwise). Click to view the full text, if incomplete in this view.
Step Chosen	The step indicated by the user who completed the assignment, when there is a choice of next step in the "Finish My Assignment" form.

Table 10: "Workflow state" and "Workflow history" column definitions*(continued)*

Column	Definition
Action Taken	Information about the work this user did with the asset (if information was entered on the form; appears as No Comment otherwise). Click to view the full text, if incomplete in this view.
Resolved By	The person who took the step that moved the asset to the next state.
Resolution Date	The date and time the step was taken to move the asset to the next state.
Task Status	The status of the assignment. Possible values are as follows: • Active - the asset is currently assigned to someone. • Cancelled - the first assignee moved the asset to the next state, so the assignment has been cancelled for the other assignees. • Completed - the assignee has completed the step.

Chapter 14

Revision Tracking

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

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

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

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

Overview

Revision tracking provides three major functions:

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

Revision Tracking

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

- Structured content assets by default are configured for single-version tracking, which means that only the current version of the structured content asset is archived. The number of versions that can be archived is set by your administrator. Archiving versions beyond the configured limit overwrites the oldest version of the asset. Contact your administrator if you have any questions or concerns about revision tracking as it applies to you.
- Document assets, by default, are configured for multiple-version tracking. Up to ten versions of a document asset can be archived—the current version and nine previous versions. Additional versions are archived at the expense of older versions. That is, archiving versions beyond the eleventh version overwrites the oldest version.

Note

Because revision tracking enables automatic checkout, you need to be especially aware of the limit on the number of versions that can be safely archived. For more information, see "When to Use Automatic Checkout," on page 182.

Checkout and Checkin

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

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

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

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

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

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

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

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

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

Rollback and Revision History

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

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

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

Automatic Checkout and Checkin

Content Server automatically checks out an asset to you if the asset is checked in *and* you try to edit, delete, roll back, or set workflow for the asset. When you save the modified asset, Content Server automatically checks in the asset and saves the version.

Note

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

When to Use Automatic Checkout

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

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

Operations That Invoke Automatic Checkout and Checkin

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

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

Working with Revision Tracking

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

Messages from Content Server

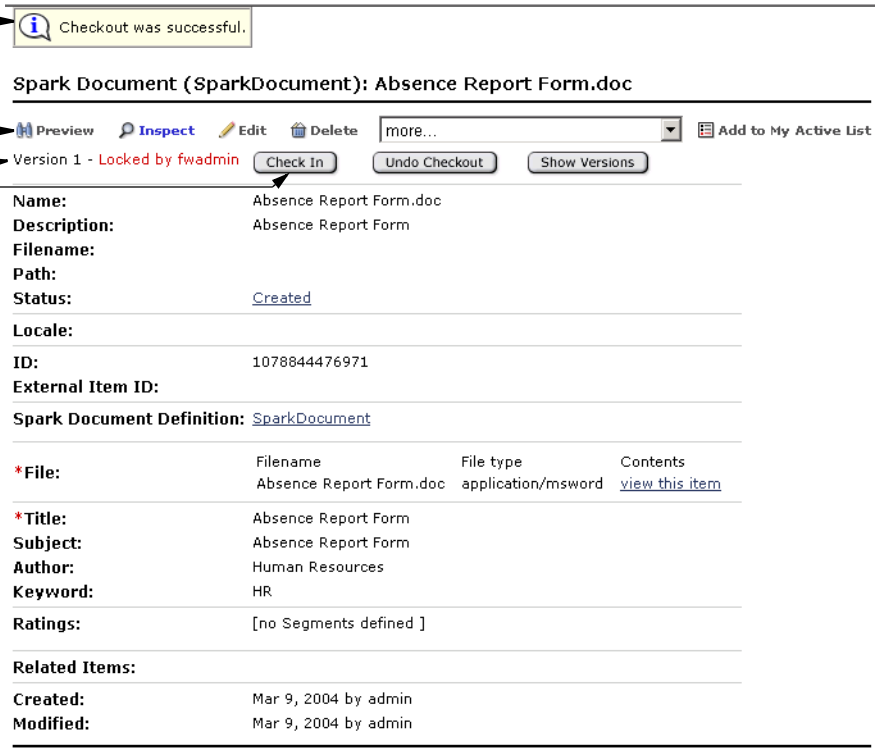
Action bar

Version numbers and controls

The **Check In** button is a toggle that displays either:

Check In when an asset is checked out (and therefore can be checked back in).

Check Out when an asset is checked in (and therefore can be checked out).



Checking Out an Asset

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

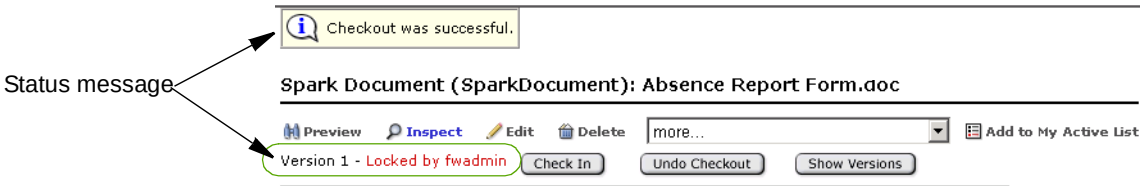
To check out an asset

1. Find the asset you want to check out.
2. Click the asset's **Inspect** icon.
3. In the asset's "Inspect" form, click **Check Out** below the action bar.

Note

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

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



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

Undoing a Checkout

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

To undo a checkout

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

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

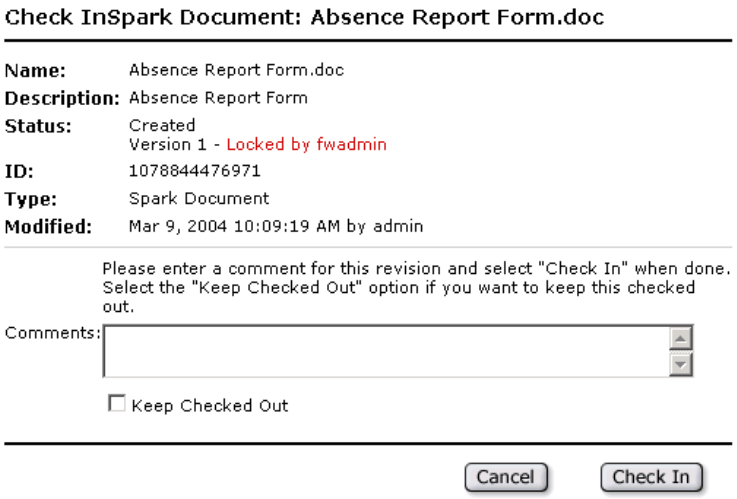
Checking in an Asset

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

To check in an asset that you have checked out

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

   The Portal interface displays the "Checkin" form:



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

   You are returned to your workspace.

Examining Version History

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

To examine an asset's version history

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

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

Revision History Report

	Version	Date	User	Comments
	3	2007-6-25 22:56:31	fwadmin	Version created by Edit
	2	2007-6-25 22:53:1	fwadmin	Updated with the lastest pre-requisites.
	1	2007-6-25 9:48:40	SYSTEM	

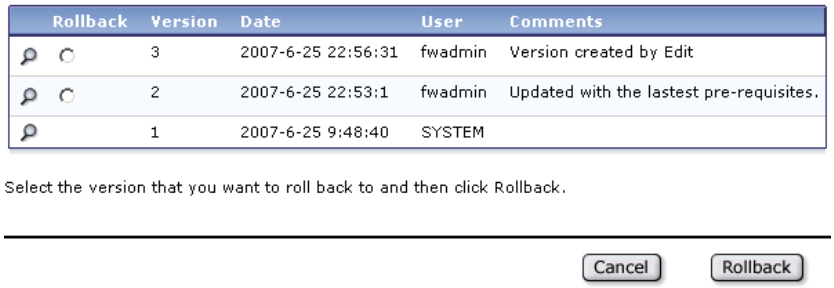
4. You can view any listed version by clicking the appropriate **Inspect** icon in the left column. The inspect view appears in a separate window.

Rolling Back to a Previous Version

To roll back an asset

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

   The Portal interface displays a list of the asset's versions:



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

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

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

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

Note

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

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

Note

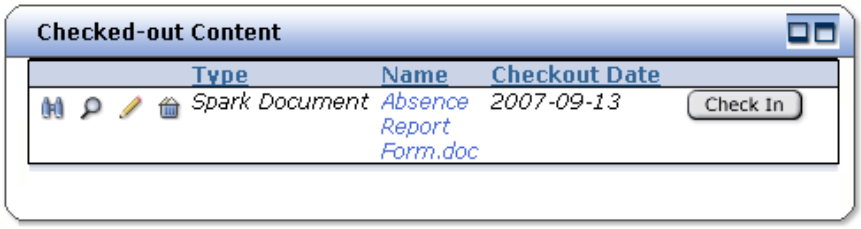
Checking in an asset removes the asset from “Checked-out Content” and “Checked-out Documents.”

To check in assets

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

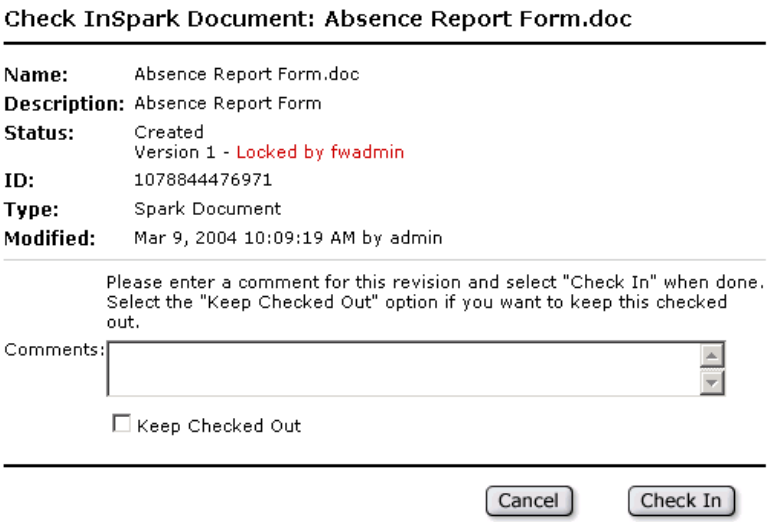
   In this procedure we use “Checked-out Content.”

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



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

   The Portal interface displays the “Check In” form:



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

Releasing Locked Assets

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

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

To release locked assets

Follow the steps in “Working with ‘Checked-out Content’ and ‘Checked-out Documents’,” on page 188.

Chapter 15

Publishing

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

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

Overview of Publishing

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

The 'Publish Console' Portlet

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

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

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

Publishing Tasks

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

Approving Assets for Publishing

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

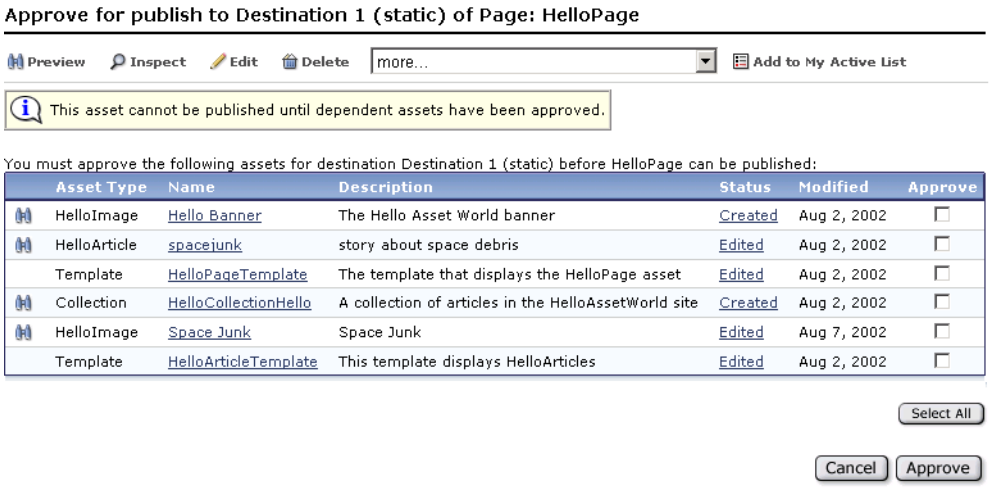
To approve an asset for publishing

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

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

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

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



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

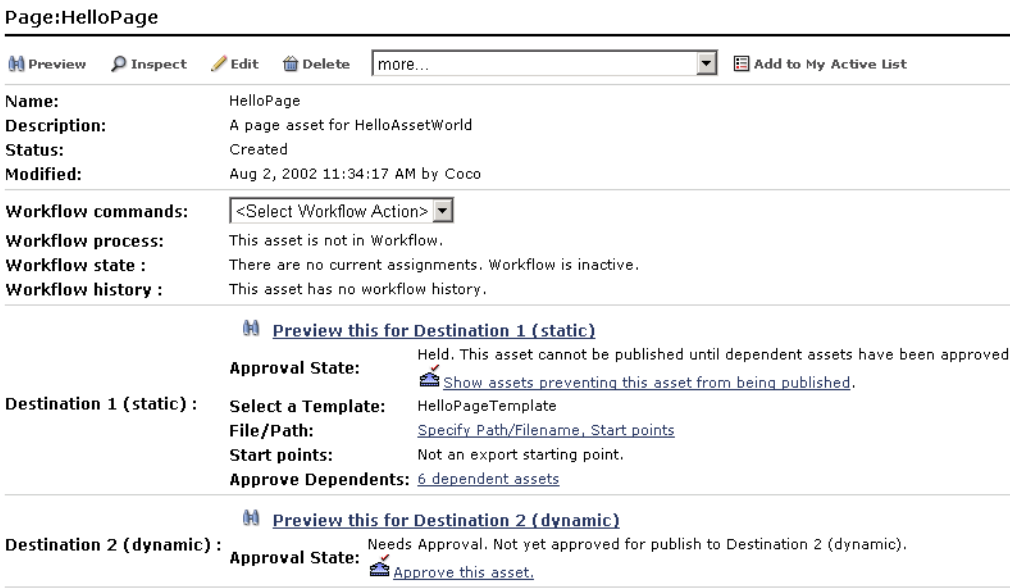
You can also approve assets from the “Status” form; see the section “Checking Approval Status,” on page 194.

Asset approval can also be automated. For example, the sample workflow process, Normal Article Process, that is included with the Burlington Financial sample site, has a final step action that automatically approves the workflowed asset to the supplied Static and Dynamic target destinations. For more information, see “Viewing Your Assignment List,” on page 160.

Checking Approval Status

To check on an asset's approval status

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



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

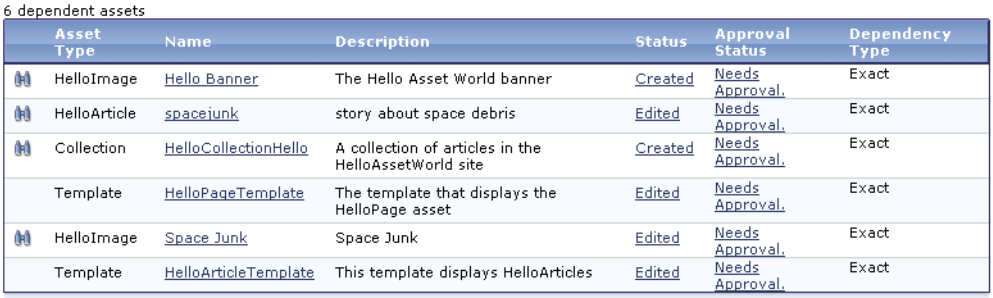
Preview this for *destination* – a hyperlink that you click to display the asset in the preview window.

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

Approval State – describes the current state of the asset in the approval cycle. A hyperlink is provided if some action is required; for example, **Approve this asset**. For more information, see "Approval States," on page 196.

File/Path: Start points – (static destinations only) a link to a form where you define an export starting point; that is, a top-level page (for example, Home) from which to calculate dependencies. Optionally, you can override file and path names that were specified at the time the asset was created. For more information, see "Assigning an Export Starting Point," on page 199.

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



6 dependent assets

	Asset Type	Name	Description	Status	Approval Status	Dependency Type
	HelloImage	Hello Banner	The Hello Asset World banner	Created	Needs Approval.	Exact
	HelloArticle	spacejunk	story about space debris	Edited	Needs Approval.	Exact
	Collection	HelloCollectionHello	A collection of articles in the HelloAssetWorld site	Created	Needs Approval.	Exact
	Template	HelloPageTemplate	The template that displays the HelloPage asset	Edited	Needs Approval.	Exact
	HelloImage	Space Junk	Space Junk	Edited	Needs Approval.	Exact
	Template	HelloArticleTemplate	This template displays HelloArticles	Edited	Needs Approval.	Exact

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

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

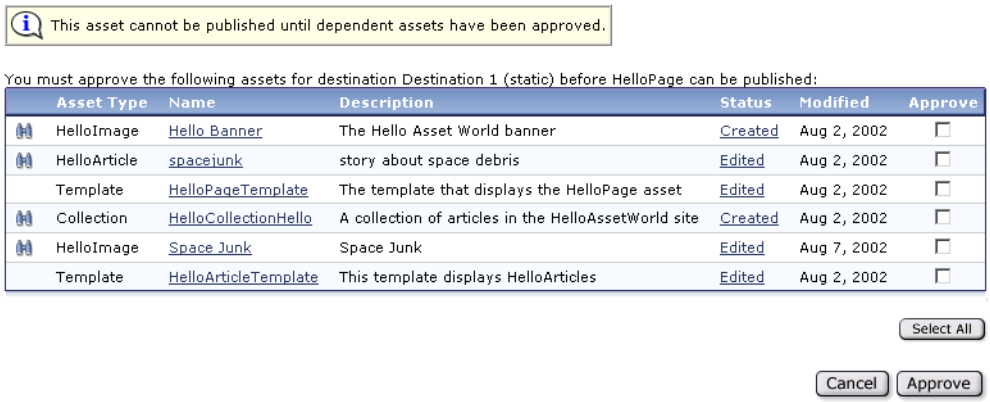
These two events parallel the actions that you take in steps 4–5 of the procedure described in the section "Approving Assets for Publishing," on page 192.

Approval States

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

State	Meaning
Approved. Approved and ready to publish to *destination*	(Informational) This asset will be published at the next publishing event to this destination, unless the asset is changed, or an exact dependency changes.
Approved and published. Asset version is the same as that on *destination*	(Informational) An asset has been published to this destination.
Currently checked out. Will not be published to *destination*	(Action may be required) The asset is checked out by a user. Although approved, it cannot be published until the user relinquishes control, by: • Checkin - the asset must be reapproved. • Undo Checkout - the asset remains approved and can be published. • Rollback - the asset must be reapproved.
Approved for inclusion as a link in pages exported to *destination*.	(Informational) This asset is approved for static publishing, if it is linked to from the page that is being exported.
Asset has been modified since approved for publish to *destination*.	(Action required) The asset must be reapproved. Click the **Approve this asset** link to initiate the approval process.
Approved, but approval for publish to *destination* was based on versions of the dependent assets that no longer exist.	(Action required) The asset must be reapproved so that its version matches that of its dependents. Click the **Approve this asset** link to initiate the approval process.
Held. Approved, but dependent assets have not been approved for publish to *destination*.	(Action required) The asset will be held until the dependents are approved. Click the **Show assets preventing this asset from being published** link to view and approve the dependents.
Needs Approval. Not yet approved for publish to *destination*.	(Action required) The asset must be approved. Click the **Approve this asset** link to initiate the approval process.
This asset cannot be published until assets referring to this asset have been approved.	(Action required) A referring asset has to be approved before this asset can be published. Related assets that are held are also listed and may require approval. Click the **Show assets preventing this asset from being published** link to view and approve referring and related assets.

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



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

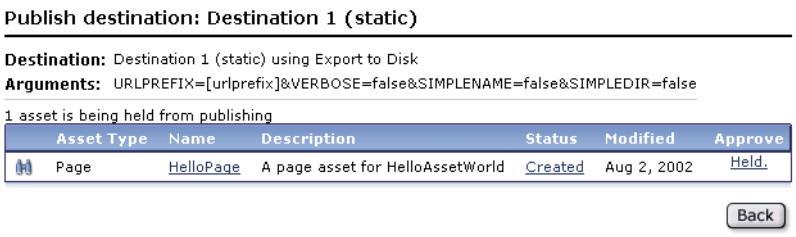
Resolving Approval Conflicts

Approval conflicts arise when an asset is approved but is held from publishing because dependent or referring assets have not been approved. The sections "Approving Assets for Publishing," on page 192 and "Checking Approval Status," on page 194 describe how to resolve approval conflicts for individual assets.

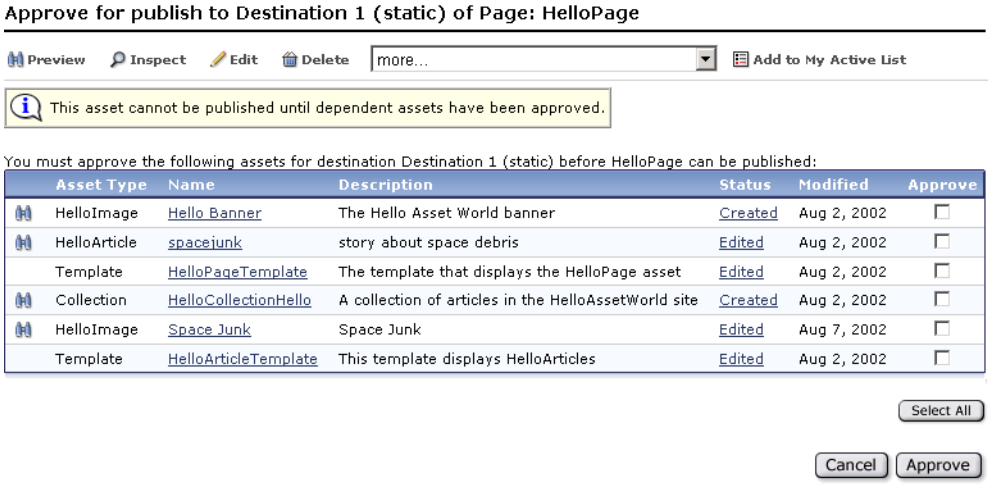
To resolve approval conflicts globally for multiple assets, use the "Publish Console" portlet to examine the publishing status for a specific destination, as described in the following procedure.

To resolve conflicts for a destination

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



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



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

Removing Assets from the Publishing Queue

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

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

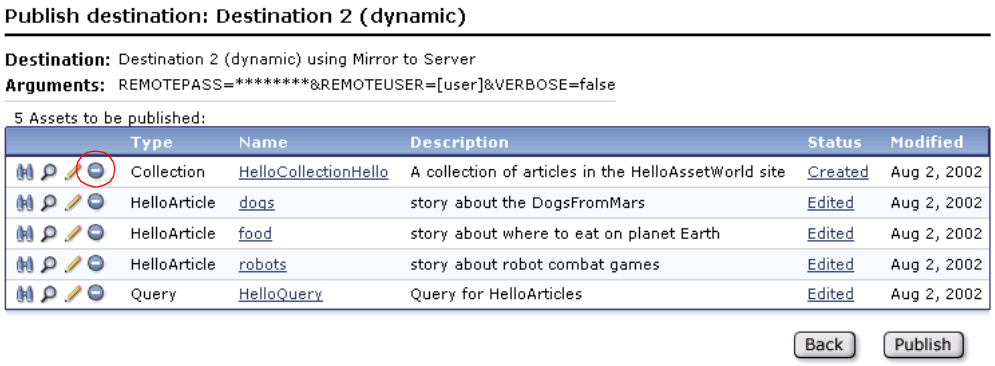
To remove an asset from the publishing queue

1. In the Portal interface, open the "Publish Console" portlet.
2. In the "Publish Destination" drop-down list, choose a destination and click **Select Destination**.

   Content Server displays the status form for that destination:

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

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



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

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

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

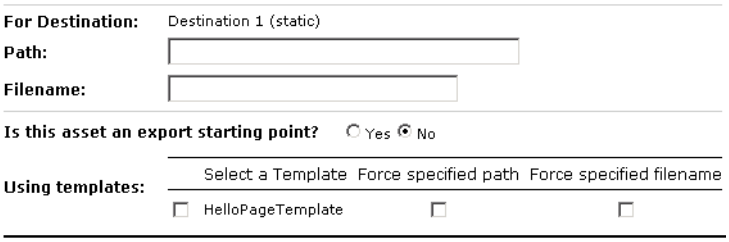
Assigning an Export Starting Point

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

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

To assign an asset as an export starting point:

1. Find the asset in the Portal interface. (If you need help, see Chapter 7, "Searching for Assets.")
2. Click the asset's **Inspect** icon to the open the asset.
3. In the asset's "Inspect" form, go to the action bar and select **Status** from the drop-down list.
4. In the **Publishing Destination** portion of the "Status" form, locate the static destination and click the **Specify Path/Filename, Start Points** link. The asset form presents specific fields, as shown in the following example from the Hello Asset World sample site:



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

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

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

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

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

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

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

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

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

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

Publishing Approved Assets

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

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

To publish approved assets

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

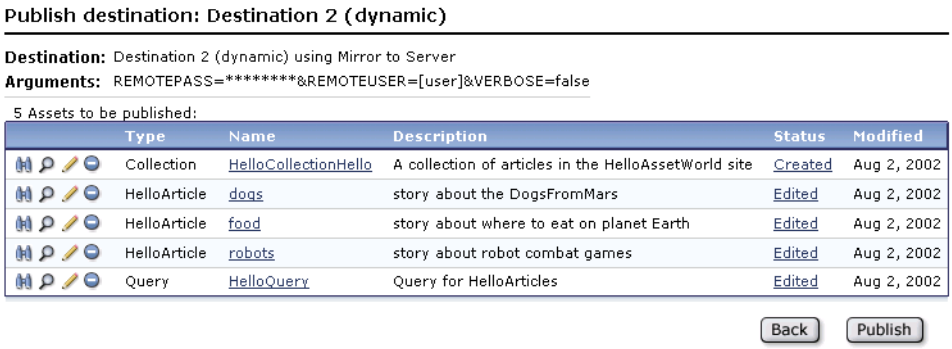
   For Export to Disk:

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

   For Mirror to Server:

   If there are no assets ready to be published to the selected destination, the **Publish** button does not appear on the form.

3. To view the list of approved assets, click the hyperlink:



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

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

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

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

Viewing Current Publish Activity

To examine current publish activity

1. In the Portal interface, open the “Publish Console” portlet.
2. Scroll down to **Running Publish Sessions**, shown as follows:

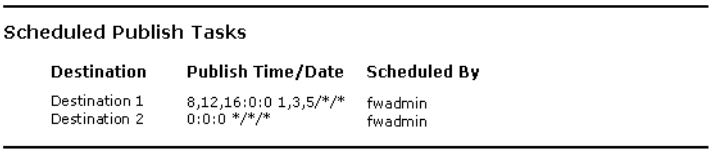
   Note the following about running sessions:

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

Viewing Scheduled Publish Activity

To check scheduled publish activity

1. In the Portal interface, open the “Publish Console” portlet.
2. Scroll down to **Scheduled Publish Tasks**, shown as follows:



Note the following about scheduled publishing:

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

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

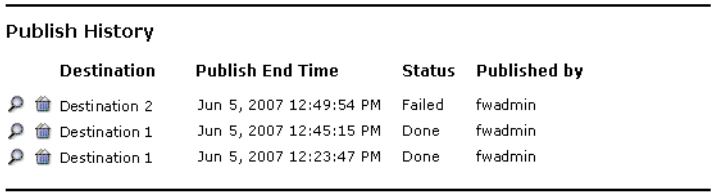
In the example shown, publishing is scheduled to **MyExportTarget** every day of the year at midnight. For **MyMirrorTarget**, publishing is scheduled for every Monday, Wednesday, and Friday at 8:00 a.m., noon, and 4:00 p.m.

Schedule information is available for all destinations across all sites.

Viewing Publish History

To review publish history

1. In the Portal interface, open the “Publish Console” portlet.
2. Scroll down to **Publish History**, shown as follows:



Note the following about publishing history:

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

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

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

Part 3

Using Engage

This part describes tasks and responsibilities performed by marketers who want to target site visitors for marketing campaigns using Engage, an optional Content Server application.

This part contains the following chapters:

Chapter 16

Engage Overview

With Content Server, you can use the flex asset model to create an online catalog offering products and content for sale. If you want to divide your market into segments that define specific groups of customers and then target those segments with personalized promotional or marketing messages, the solution is Engage.

Engage adds merchandising features to Content Server and extends the XML and JSP object methods available for programming your e-commerce site. It enables you to design online sites that gather information about your site visitors and customers, evaluate that information, and then use that information to personalize the product placements and promotional offerings that are displayed for each visitor.

This chapter contains the following sections:

About Merchandising Assets

With Engage, you use merchandising assets to do the following:

- Collect visitor data using the “Visitor Attribute,” “History Attribute,” and “History Definition” assets
- Use that visitor data to define visitor segments (using “Segment” assets)
- Recommend products and content to visitors based on the segments they belong to (using “Recommendation” assets)
- Run promotions that apply to all or specific segments (“Promotion” assets)

Developers and administrators create and manage the visitor data and underlying business logic, while marketers create and manage the “Segment,” “Recommendation,” and “Promotion” assets. As with any of the other Content Server applications, you create and work with assets on the management site. Then, when assets are approved, you publish them to your delivery site.

Marketers and developers are expected to collaborate extensively to implement effective merchandising efforts.

Using Segments to Categorize Visitors

Segments are assets that categorize groups of visitors based on the visitor data that you are gathering about them. You build segments by determining which kinds of visitor data to use as filtering criteria and then setting the values that qualify or disqualify a visitor for the segment.

You use the “Segment Filtering” forms in Engage to categorize groups of visitors based on the visitor attributes, history attributes, and history definitions created by the developers.

Segments are the key to personalization with Engage. When visitors browse your site, the information they submit is used to qualify them for segment membership. When the site displays a page with a recommendation or promotion, Engage determines which segments a visitor belongs to and displays the product recommendations or promotional messages that are designated for those segments.

For detailed information on segments, see Chapter 17, “Grouping Visitors into Segments.”

Making Recommendations to Segmented Visitors

You create “Recommendation” assets and then configure them by rating assets based on their importance to the segments that you have created.

Recommendations are assets that determine which products or content should be featured or “recommended” on a site page. These assets are rules that are based on the segments the visitors qualify for, and, in some cases, relationships between the product or content assets.

Recommendations have templates. A recommendation returns a list of assets to its template when the template is rendered on a site page. The items in a list of recommended assets are rated according to their importance to the current visitor based on the segments that the visitor belongs to.

For detailed information on recommendations, see Chapter 18, “Creating and Configuring Recommendations.”

Basing Promotions on Buying Patterns

Promotions are assets that define an offer of value (a discount) to the visitors based on the products that the visitor is buying and the segments that the visitor qualifies for. This value can be offered in several ways:

- A discount off the purchase price of the promoted products
- A discount off the entire value of the shopping cart
- A discount off shipping charges
- A combination discount: a shipping discount with a price or cart discount

Promotions use the same templates as recommendations. You decide which recommendation the promotion overrides, and Engage uses that recommendation's template to render the promotion on the site page.

For detailed information on segments, see Chapter 19, "Creating Promotions."

Chapter 17

Grouping Visitors into Segments

Segments are assets that categorize visitors into groups on the basis of visitor data that you gather. You build segments by determining which kinds of visitor data to use as filtering criteria and then setting values that qualify or disqualify a visitor for the segment.

This chapter describes segments and presents procedures for creating them. It includes the following sections:

About Segments

Segments are used to create recommendations and promotions. The segments determine which content in the recommendations and promotions visitors qualify for and display that content to the visitors.

Segments are the key to personalization and merchandising with Engage. You, as a marketer, create the visitor segments that the site pages depend on because you know which merchandising messages should be associated with specific visitor segments.

When you create a segment, you specify filtering criteria that a visitor must match in order to be included as a member of that segment. This is comparable to when database or site administrators create a database query, and they specify parameters that a database record must match in order to be included in the results of the query.

Segments and Visitor Data Assets

You build segments by using the visitor data assets as filtering criteria. There are three kinds of visitor data assets: visitor attributes, history attributes, and history definitions.

- **Visitor attributes** hold types of information that specify one characteristic only. For example, there can be attributes named *years of experience*, *job description*, or *number of children*.

  When visitors change the data, the new data overwrites the old. For example, if a visitor changes her job description from *analyst* to *marketing specialist*, there is no record of the fact that the visitor used to be an analyst.
- **History attributes** are individual information types that you group together to create a single type of historical record.
- This historical record is a **history definition**. For example, a history definition called *purchases* could be made up of the history attributes *SKU #*, *itemname*, *quantity*, and *price*.

  Engage treats the data recorded as a history definition as a whole unit of information. It assigns a timestamp to and stores each instance of the data, which means that you can create segments based on counts or sums of history definitions.

Developers create the visitor data assets based on the kinds of information that the marketing and design teams want to collect and analyze. You and the other marketers can use those assets to create segments that categorize your visitors, and the developers program your site pages to collect and store visitor information.

Developing Segments: Process Overview

There are five general steps for creating segments:

1. **Planning.** A cross-functional design team including developers and marketers determines the data you want to gather about your site visitors.
2. **Creating visitor data assets.** The developers create and define the necessary visitor attributes, history attributes, and history definitions using the forms in Engage.
3. **Creating segments.** You (the marketers) use the “Segment” forms in Engage to categorize visitors on the basis of visitor attributes, history attributes, and history definitions.

4. **Collecting visitor data.** The developers program the appropriate site pages to collect and store visitor data. For example, they might create an online registration form for visitors to fill out with information that qualifies them for segments. When visitors browse your site, the information they submit is stored in the Content Server database.
5. **Segmenting visitors.** Now when visitors browse your site, the information they submit is used to qualify them for segment membership. The promotional messages and recommended products are personalized based on the segments that visitors qualify for.

About the Segment Forms

You will use two forms when creating segments, the “Segment Filtering Criteria” form and the “Segment Definition” form. This section describes these forms.

“Segment Filtering Criteria” Form

The “Segment Filtering Criteria” form displays the visitor data assets that you can use to create segments. In this form you select the criteria that will define your segment.

Categories

The visitor data assets in the “Segment Filtering Criteria” form are organized within categories that are listed across the top of the form. For example:

When you click a category, the form displays the visitor attributes or the history definitions in that category.

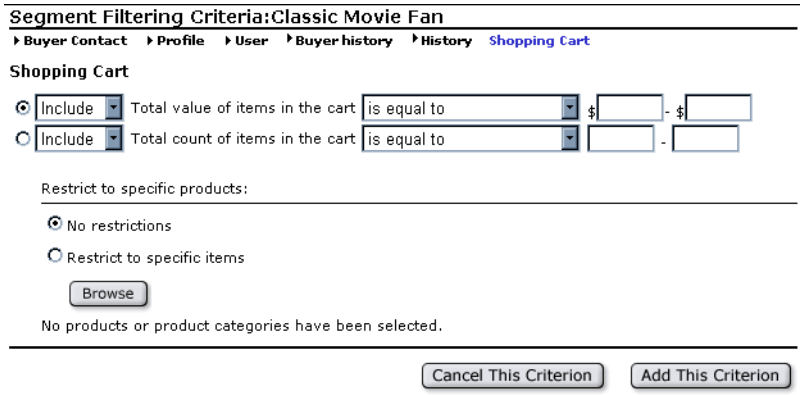
Because visitor data assets are so varied, developers assign them to categories to organize them. (Developers create categories when they define visitor data assets.) For example, the above image displays the category **Profile**, which developers created for visitor attributes that are related to personal information about the visitors.

Note

The actual categories of visitor data assets will likely differ for your installation, depending on the installation options and what your developers have defined. See your developers if you need information about categories or visitor data assets.

The “Shopping Cart” Form

“Shopping Cart” is listed with the categories on the segment filter forms but the shopping cart is a special, default feature rather than a category of attributes.



You can use the “Shopping Cart” form to create segments based on the following kinds of conditions:

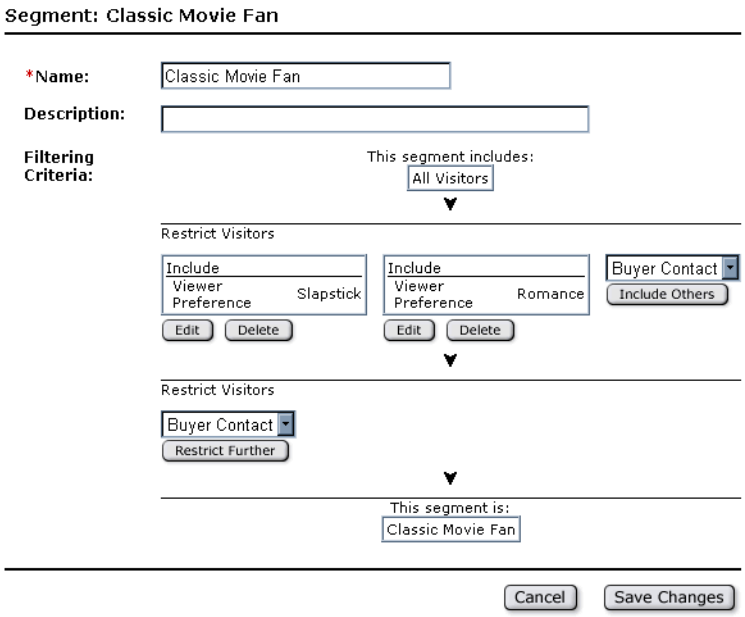
- The total value of all the products in the shopping cart
- Whether a specific product is in the shopping cart
- Whether a certain number of products are in the shopping cart
- Whether a certain number of specific products is in the shopping cart

If you want to implement a promotion based on the current state of a visitor’s shopping cart, use this form to build a segment and then use the segment in the promotion.

The “Shopping Cart” form is always available for defining your segments. Therefore, even before your site developers create visitor attributes or history definitions, you can create segments defined by shopping cart information.

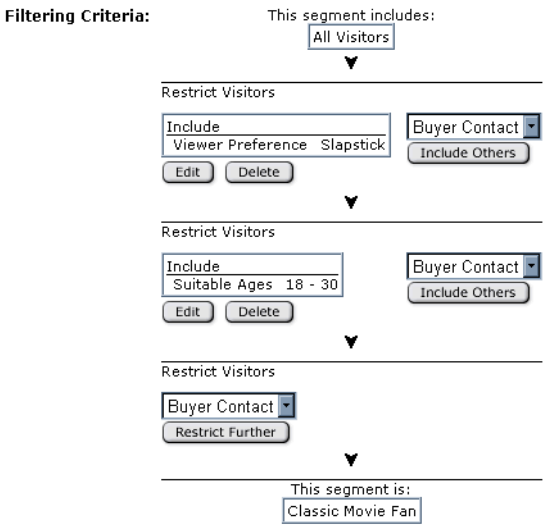
The “Segment Definition” Form

While you’re creating a segment, Engage displays each condition (criterion) that you add to the segment in a form similar to the following:



As you add criteria to a row (across the table), you create a more inclusive segment. In the preceding form, the visitor can be interested in either suspense movies or romance movies or both kinds of movies to be included in the segment. In other words, you add more factors that can qualify a visitor for a segment by working across the table, adding criteria to the same row.

As you add criteria to a column (down the table), you create a more restrictive segment. In the following example, a visitor belongs to the segment only if both the criteria are true:



The visitor must be interested in slapstick movies and be between the ages of 18 and 30 to belong to the segment. In other words, you add restrictions to a segment by working down the form, adding them to the column.

In summary, segments broaden as you add criteria across the table and narrow as you add criteria down the table.

Creating Segments

Before you create segments, be sure the following tasks have been completed:

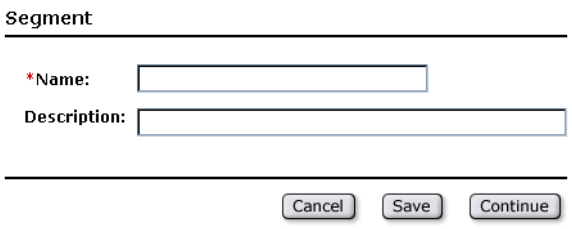
- The marketing, design, and development teams met to determine the kinds of data that you want to collect about your visitors.
- The developers created the visitor attributes, history attributes, and history definitions that the cross-functional team decided are necessary.
- You (the marketers) obtained a list or overview of the visitor data assets that were created and you understand what they mean and how they are categorized.

Step 1: Name and Define the Segment

1. Expand the “Create Content” portlet.
2. In the “Create Content” portlet, click **New Segment**.

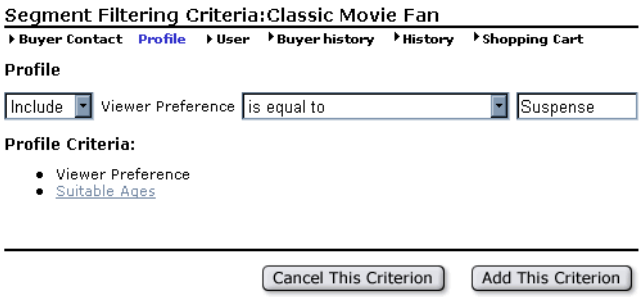
> **Note**
>
> If **New Segment** does not appear in the “Create Content” portlet, stop here. You do not have the permissions to create segments. Consult your administrator for more information on your permissions.

Content Server displays the “New Segment” form:



3. In the **Name** field, enter a unique, descriptive name for the segment. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
4. In the **Description** field, enter a brief description of the segment. You can enter up to 128 alphanumeric characters.
5. Click **Continue**.

Content Server displays the “Segment Filtering Criteria” form. The categories of visitor attributes and history definitions you can use to build your segment are listed across the top of the form.



Note that filtering on text strings is case-sensitive unless it is explicitly set not to be so.

6. Do one of the following:
   - If you want to create a segment based on a visitor attribute, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes.
   - If you want to create a segment based on a history definition, go to Step 3: Create Segment Filtering Criteria with History Definitions.
   - If you want to create a segment based on the shopping cart, go to Step 4: Define the Segment with Shopping Cart Criteria.

Step 2: Create Segment Filtering Criteria with Visitor Attributes

1. In the “Segment Filtering Criteria” form, click the name of a category that lists visitor attributes.

   Engage displays a list of the attributes in the category.
2. Click the name of the attribute that you want to use to define the segment.
3. The form displays constraint fields that are meaningful for that attribute.
4. Use the form to set the attribute values that include a visitor in the segment or exclude a visitor from the segment.

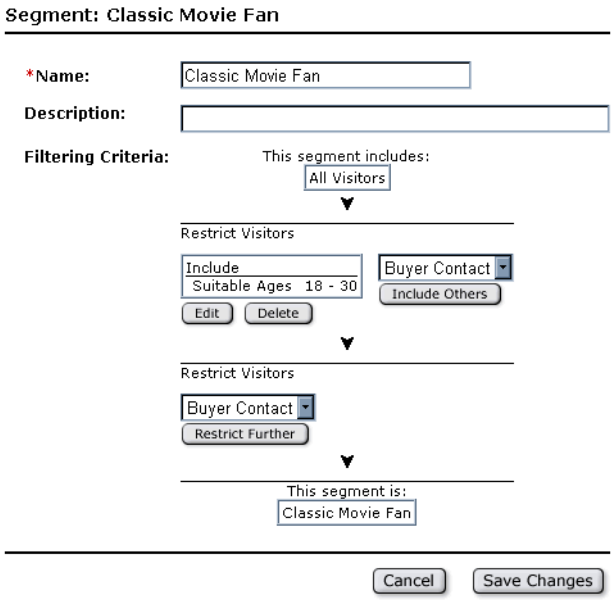
   For example, if the attribute is “age” and you want to include people between the ages of 18 and 30, set the values as follows:

To exclude people who are in that age range, set the values as follows:

To include only people who are 18, set the values as follows:

5. Click **Add This Criterion**.

   The criterion is added to the segment.

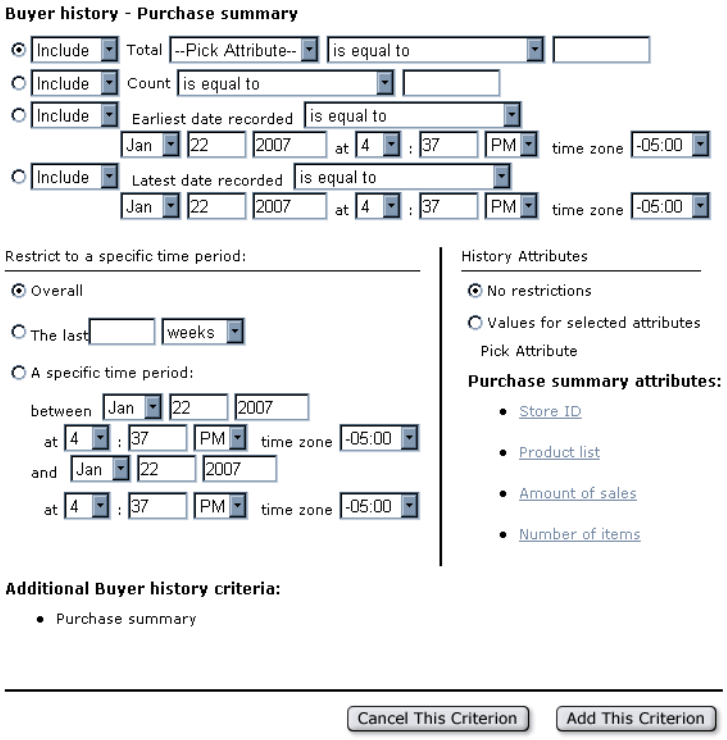


6. Do one of the following:
   - If you are finished creating this segment, click **Save**.
   - To add another criterion to the segment, continue this procedure.
7. Do one of the following:
   - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
   - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**
8. Do one of the following:
   - If you selected a visitor attribute category, go back to step 2 of this procedure.
   - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions.
   - If you selected **Shopping Cart**, go to Step 4: Define the Segment with Shopping Cart Criteria.

Step 3: Create Segment Filtering Criteria with History Definitions

1. In the “Segment Filtering Criteria” form, click on a category for a history definition.

   The “Segment Filtering Criteria” form for history definitions is displayed. It shows the first history definition in the category. For example:



   It has three general areas that you use to restrict or filter items:

   - The options area at the top of the form
   - The time restriction area on the left of the form
   - The history attribute restriction area on the right of the form. This section lists the history attributes that define the history definition.

   Note

   To use a different history definition from the one displayed in the form, select one from the **Additional Criteria** list at the bottom of the form.

2. Use one or more of the following options to create simple or complex criteria by using all three areas in the “Segment Filtering Criteria” form to restrict or filter one item.

Option 1: Filtering Based on a Total

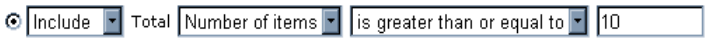
You can define the segment based on a total, such as the total amount spent, a total price, or a total number of items.

For example, a site developer could create a history definition named **Purchase History**, which would be a historical record of purchases made by site visitors. One of the history attributes in this definition could be **number of items**. Using this history definition, a marketer could create a segment based on the total number of items purchased by site visitors.

To define a segment based on a total, complete the following steps:

1. Select the **Total** option and then set the values that include a visitor in the segment or exclude a visitor from the segment.

   For instance, the example history definition **Purchase History** could be set to include visitors who have purchased 10 items or more:

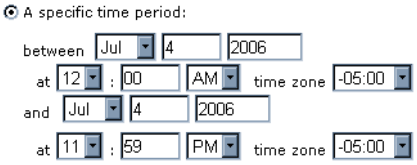
   

2. Under **Restrict to a specific time period**, specify the time period to use for the total.

   For example, to include visitors who bought the specified number of items during the last six months, the time option values for the **Purchase History** history definition could be set as follows:

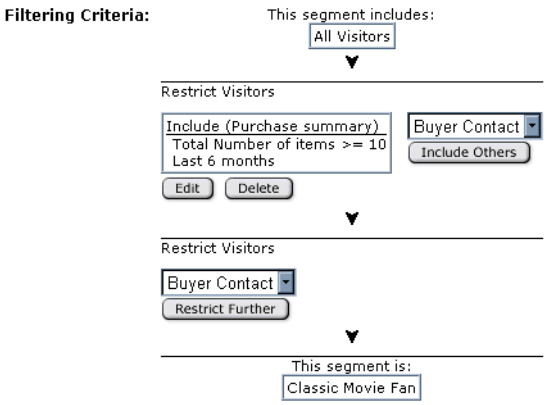
   

   To include visitors who bought the specified number of items on a specific day—perhaps a holiday—the values could be set as follows:

3. (Optional) To further restrict this criterion by adding a history attribute to it, go to Option 5: Adding a History Attribute to Further Define the Segment.

4. Click **Add this Criterion**. The criterion is added to the segment.

5. Do one of the following:

   - If you are finished creating this segment, click **Save**.

- To add another criterion to the segment, continue this procedure.

6. Do one of the following:
   - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
   - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**
7. Do one of the following:
   - If you selected a visitor attribute category, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes
   - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions
   - If you selected Shopping Cart, go to Step 4: Define the Segment with Shopping Cart Criteria

Option 2: Filtering Based on a Count

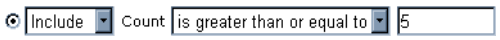
You can define the segment based on the total number of times this history definition was recorded for a visitor.

For instance, using the **Purchase History** history definition described in Option 1: Filtering Based on a Total, a marketer could define a segment based on the number of times **Purchase History** was recorded for a visitor. The effect of this criterion is that Engage would consider how many times a visitor purchased anything instead of considering what they bought or how much they spent.

To define a segment based on a count, complete the following steps:

1. Select the **Count** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

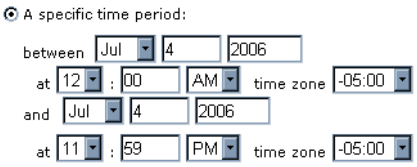
   For example, the **Purchase History** history definition could be set to include visitors who have purchased something (anything) at least five times:



2. Under **Restrict to a specific time period**, specify the time period to use for the count.

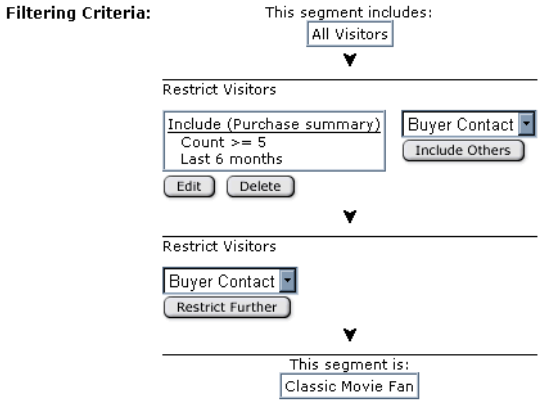
   For example, to include visitors who bought during the last six months, the time option values for the **Purchase History** history definition could be set as follows:

To include visitors who bought something on a specific day—perhaps a holiday—the values could be set as follows:



3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to Option 5: Adding a History Attribute to Further Define the Segment
4. Click **Add this Criterion**.

   The criterion is added to the segment.



5. Do one of the following:
   - If you are finished creating this segment, click **Save**.
   - To add another criterion to the segment, continue this procedure.
6. Do one of the following:
   - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
   - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**
7. Do one of the following:
   - If you selected a visitor attribute category, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes.
   - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions
   - If you selected Shopping Cart, go to Step 4: Define the Segment with Shopping Cart Criteria.

Option 3: Filtering Based on the First Time a History Definition Was Recorded

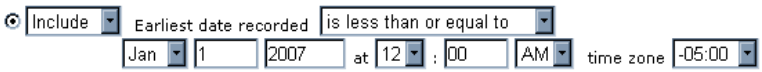
You can define the segment based on the first time the history record was recorded for visitors.

For instance, using the **Purchase History** history definition described in Option 1: Filtering Based on a Total a marketer could define a segment based on the first time the visitor purchased something—in other words, the first time a **Purchase History** record was recorded for the visitor.

To define the segment based on the first time the definition was recorded, complete the following steps:

1. Select the **Earliest** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

   For example, the **Purchase History** history definition could be set to include visitors who purchased something on or before January 1, 2007:

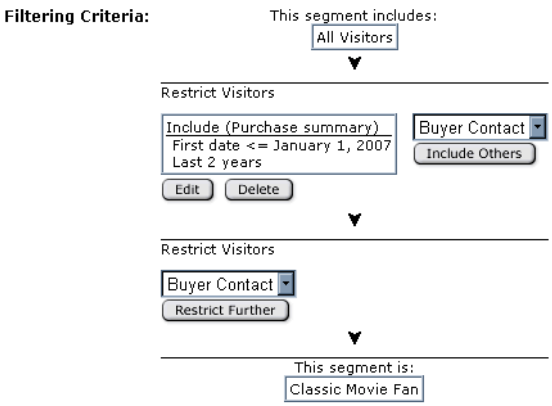


2. Under **Restrict to a specific time period**, specify the time period to use for this condition.

   For example, if a marketer wanted to include visitors who purchased something on or before a specific date (in this example, January 1, 2007) but did not want to include them if the date of that purchase was more than two years ago, the **Purchase History** time values could be set as follows:

3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to Option 5: Adding a History Attribute to Further Define the Segment.
4. Click **Add this Criterion**.

   The criterion is added to the segment.



5. Do one of the following:
   - If you are finished creating this segment, click **Save**.
   - To add another criterion to the segment, continue this procedure.
6. Do one of the following:
   - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
   - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**
7. Do one of the following:
   - If you selected a visitor attribute category, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes.
   - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions.
   - If you selected Shopping Cart, go to Step 4: Define the Segment with Shopping Cart Criteria.

Option 4: Filtering Based on the Last Time a History Definition Was Recorded

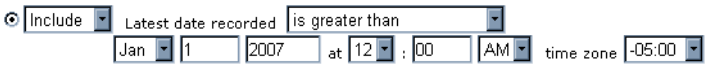
You can define the segment based on the last time (the most recent time) the history definition was recorded for a visitor.

For instance, using the **Purchase History** history definition described in Option 1: Filtering Based on a Total a marketer could define a segment based on the most recent time the visitor purchased something—in other words, the last time a **Purchase History** record was recorded for the visitor.

To define the segment based on the last time the history definition was recorded, complete the following steps:

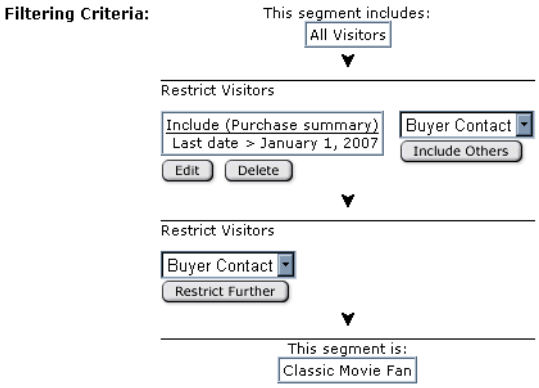
1. Select the **Latest** option at the top of the form and then set the values that include a visitor in the segment or exclude a visitor from the segment.

   For example, to include visitors who have purchased something since January 1, 2007, the **Purchase History** values could be set as follows:



2. Under **Restrict to a specific time period**, specify the time period to use for this condition (**Overall** in our example).
3. (Optional) If you want to further restrict this criterion by adding a history attribute to it, go to Option 5: Adding a History Attribute to Further Define the Segment.
4. Click **Add this Criterion**.

The criterion is added to the segment. For example:



5. Do one of the following:
   - If you are finished creating this segment, click **Save**.
   - To add another criterion to the segment, continue this procedure.
6. Do one of the following:
   - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
   - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**
7. Do one of the following:
   - If you selected a visitor attribute category, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes.
   - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions.
   - If you selected Shopping Cart, go to Step 4: Define the Segment with Shopping Cart Criteria.

Option 5: Adding a History Attribute to Further Define the Segment

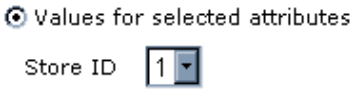
You can add a history attribute to create a more complex segment—one that further restricts the count, total, first, or last record by taking a specific attribute into consideration.

To add a history attribute to further define the segment, complete the following steps:

1. Select and configure one of the four options at the top of the form (**Count**, **Total**, **Earliest**, or **Latest**). If you need help with this step, go to one of these procedures:
   - Option 1: Filtering Based on a Total
   - Option 2: Filtering Based on a Count
   - Option 3: Filtering Based on the First Time a History Definition Was Recorded
   - Option 4: Filtering Based on the Last Time a History Definition Was Recorded

2. Under **History Attributes** (on the right side of the form), select the **Values for selected attributes** option.
3. Under the attribute list for this history definition, click the history attribute that you want to use as a filter.

   The form displays constraint fields that are meaningful for that attribute.
4. Use the constraint fields to set the attribute values that further constrain the criterion. For example:



5. Under **Restrict to a specific time period**, specify the time period to use for this condition.
6. Click **Add this Criterion**.

   The criterion is added to the segment.
7. Do one of the following:
   - If you are finished creating this segment, click **Save**.
   - To add another criterion to the segment, continue this procedure.
8. Do one of the following:
   - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
   - To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**
9. Do one of the following:
   - If you selected a visitor attribute category, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes.
   - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions.
   - If you selected Shopping Cart, go to Step 4: Define the Segment with Shopping Cart Criteria.

Option 6: Adding Products to Further Define the Segment

You can add products to create a more complex segment—one that further restricts the count, total, first, or last record by taking specific products into consideration—if the history definition that you use to define this segment has a product list history attribute.

To add a product to the segment definition, complete the following steps:

1. Select and configure one of the four options at the top of the form (**Count**, **Total**, **Earliest**, or **Latest**). If you need help with this step, go to one of these procedures:
   - Option 1: Filtering Based on a Total
   - Option 2: Filtering Based on a Count

- Option 3: Filtering Based on the First Time a History Definition Was Recorded
- Option 4: Filtering Based on the Last Time a History Definition Was Recorded

2. Under **History Attributes** (on the right side of the form), select the **Values for selected attributes** option.
3. Under the attribute list, select **Product List**.

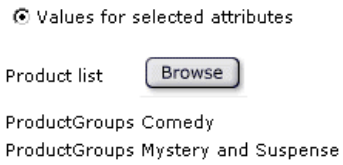
   The form displays a **Browse** button.
4. Click **Browse**.

   Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.
5. In the drop-down list in the pop-up window, select the asset type of the asset(s) you want to add to the list. (In our example, select **Find Product**.)
6. In the **Search For** field in the **Search** tab, enter criteria identifying the asset(s) and click **Search**.
7. In the list of search results, select the check box next to each desired asset.

> **Note**
>
> You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

8. Click **Select**.

   The pop-up window automatically closes and Content Server lists the product parents and products that you selected. For example:



9. Under **Restrict to a specific time period**, specify the time period to use for this criterion.
10. Click **Add this Criterion**.

    The criterion is added the segment.
11. Do one of the following:
    - If you are finished creating this segment, click **Save**.
    - To add another criterion to the segment, continue this procedure.
12. Do one of the following:
    - To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.

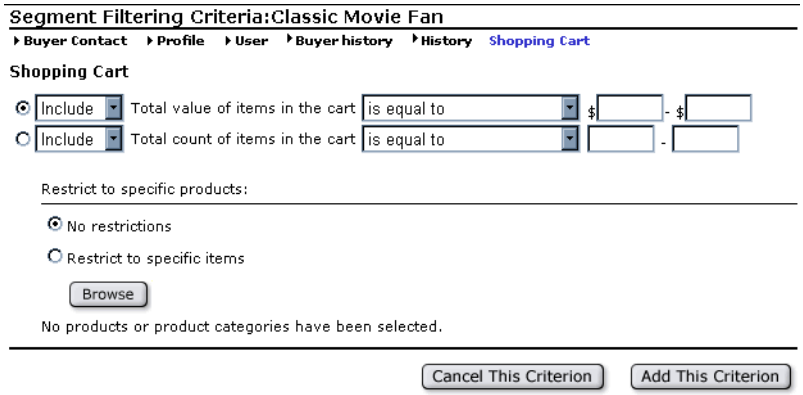
- To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**

13. Do one of the following:
    - If you selected a visitor attribute category, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes.
    - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions.
    - If you selected Shopping Cart, go to Step 4: Define the Segment with Shopping Cart Criteria.

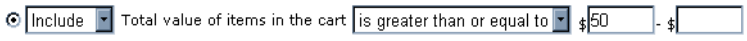
Step 4: Define the Segment with Shopping Cart Criteria

1. Click **Shopping Cart**.

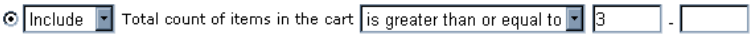
   Engage displays the "Shopping Cart" section of the "Segment Filtering Criteria" form:



2. Do one of the following:
    - To define this segment based on the total **value** of the items in a visitor's shopping cart, select the first option and then set the values. For example, to include visitors who have at least $50 worth of products in their carts, set the values as follows:



    - To define this segment based on the total **number** of items in the visitor's shopping cart, select the second option and then set the values. For example, to include visitors who have three or more items in their carts, set the values as follows:



3. To restrict the item count or cart value to specific products in the catalog:
    a. Click **Browse**.

Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

b. In the drop-down list in the pop-up window, select the asset type of the asset(s) to which you want to restrict the cart. (In our example, select **Find Product**.)

c. In the **Search For** field in the **Search** tab, enter criteria identifying the asset(s) and click **Search**.

d. In the list of search results, select the check box next to each desired asset.

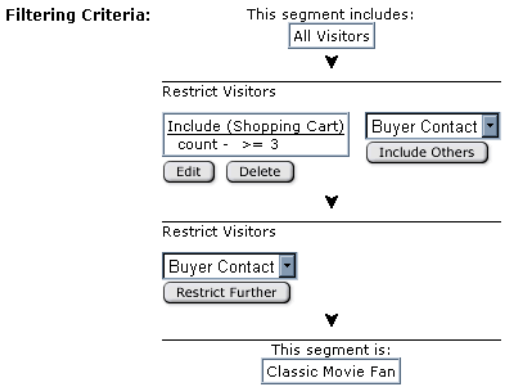
> **Note**
>
> You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

e. Click **Select**.

The pop-up window automatically closes and Content Server adds the selected assets to the list of items.

4. Click **Add this Criterion**.

The shopping cart criterion is added to the segment.



5. Do one of the following:

- If you are finished creating this segment, click **Save**.
- To add another criterion to the segment, continue this procedure.

6. Do one of the following:

- To add another criterion that qualifies a visitor for this segment, select a category name from the drop-down list to the right (in the same row) of the criterion that you just added, and click **Include Others**.
- To add more restrictions to the segment, select a category name from the drop-down list under (in the next row) the criterion that you just added, and click **Restrict Further.**

7. Do one of the following:
   - If you selected **Shopping Cart**, return to step 2 in this procedure.
   - If you selected a visitor attribute category, go to Step 2: Create Segment Filtering Criteria with Visitor Attributes.
   - If you selected a history definition category, go to Step 3: Create Segment Filtering Criteria with History Definitions.

Sample Segment Assets

When you install Engage with the Burlington Financial sample site, you get two sample segment assets, **BFfrequentvisitors** and **highriskinvestors**. These segments are designed to work in concert with the sample "Recommendation" and "Promotion" assets that also appear in the Burlington Financial sample site. Use these sample segments as templates for creating segment assets for your site.

Publishing Segments

When your segments are ready, you must approve them so they can be published to your delivery system. Engage can then use the segments to assess visitors and recommend the appropriate items to them.

Be sure to examine or inspect your segments to verify that you configured them correctly before approving them for publishing.

For more information about approving and publishing assets, see Chapter 15, "Publishing."

After You Publish

After you have created, verified, and published the segments, you must assign ratings to the products and content that are significant to members of each segment. For details, see Chapter 18, "Creating and Configuring Recommendations."

You can also create promotions after you have created segments. For more information, see Chapter 19, "Creating Promotions."

Chapter 18

Creating and Configuring Recommendations

Recommendations are assets that determine which assets are featured or “recommended” on a site page. Recommendations calculate which assets to recommend based on the segments the visitors qualify for, and, in some cases, context-based relationships between assets (for example, movies related to each other by genre).

After you create the “Recommendation” assets, (typically, marketing people create “Recommendation” assets), you configure them by rating their child assets based on their importance to the segments that visitors qualify for. Assets are recommended (or are not recommended) based on those ratings. Additionally, the Related Items recommendation defines relationships between assets that allow for cross- or up-selling items according to how those items are related to one another. You determine which assets have those relationships.

This chapter contains the following sections:

Recommendation Assets

A “Recommendation” asset collects, assesses, and sorts assets, and then recommends the most appropriate of these assets to the current visitor. How does it determine which assets are the most appropriate? By consulting the list of segments that the visitor belongs to and any confidence set in the recommendation for each asset. (For information about confidence, see “Confidence,” on page 236.)

You create segments and then rate the flex assets for their importance to each segment. When a “Recommendation” asset is invoked from a site page, Engage determines which segments the current visitor qualifies for, and then selects the assets that are identified by the recommendation to have the highest rating for those segments. These are the assets that are recommended to the visitor.

Engage provides the following types of recommendations:

- **Static Lists** – operates in two modes, List and Recommendation:
  - In List mode, a Static Lists recommendation holds and returns a single static, preselected list of assets regardless of segments (or whether segments apply at all). Confidence values are automatically assigned to assets on the list based on their position on the list; the first asset receives a confidence value of 100%, the next one 99%, and so on, in descending order.
  - In Recommendation mode, a Static Lists recommendation holds and returns static, preselected lists of recommended assets when the visitor qualifies for segments defined in the recommendation, and also when no segments apply.

    When a template invokes the recommendation, the recommendation returns the assets on the static lists. For each asset that you add to a segment’s static list, you can assign a confidence value for In Segment and Out of Segment ratings. (A variant of this type of recommendation was formerly known as “manual.”)

  You create a static lists recommendation by selecting assets from your Active List and adding them to each segment’s list (recommendation mode) or the common list (list mode). Because this is a static lists recommendation, the assets in the list(s) remain the same until you change them (or delete them from the database).
- **Dynamic Lists** – references a special asset called a “CSElement” asset, which your developers have coded as a type of program known as an element. When a template invokes the Dynamic Lists recommendation, it executes the element, which returns a list based on the conditions defined in the element. For example, you could create a recommendation named “New Products” whose referenced element selects only those “Product” assets that have been added to the database in the past five days.

  You create a Dynamic Lists recommendation by selecting a “CSElement” asset (which contains the logic for generating the list). You can then test the selected element by displaying the current list results.

  As its name implies, this type of recommendation is dynamic: each time it is invoked by a template, the recommendation executes the element, which regenerates the list, based on the current state of the database.
- **Related Items –** holds the name of a relationship between flex assets that are related to one another based on context (for example, similarly themed movies). When a template invokes a Related Items recommendation, assets are returned (recommended) only if they are manually configured to have the relationship named by the recommendation with the asset that is currently displayed on the page.

Typical relationships between assets are cross-sell and up-sell relationships. For example, a Related Items recommendation named “Cross-Sell” displays a list of science fiction movies on rendered pages that display suspense movies because the marketers determined that people who buy science fiction movies also buy suspense movies.

You create a Related Items recommendation by naming it and specifying that it is a Related Items recommendation. You must then determine which flex assets should have the relationship represented by this recommendation with other flex assets. You assign these relationships in the parent asset’s “New” or “Edit” form, and you assign a confidence value to each asset on the list for each segment.

When the recommendation is rendered by its template, Engage does the following:

- Identifies which assets have the relationship named by the recommendation with the currently displayed asset.
- Examines the ratings for those assets to determine whether those assets are relevant for the current visitor.

The functionality of each of the available types of “Recommendation” assets is summarized in the following table:

Parameter	Static Lists (List Mode)	Static Lists (Recommendation Mode)	Dynamic Lists	Related Items
Ratings (by segment)	Yes	Yes	Yes	Yes
Confidence (by segment)	Determined by asset’s position in the list; no segment distinction.	Yes	Yes	Yes
Selection Criteria	Highest only	Highest, Random	Highest, Random	Highest, Random
Sort Order	Descending by confidence only	Yes	Yes	Yes
Options	• Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types	• Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types	• Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types	• Can return the children of recommended assets • Can be overridden by promotions • Can apply to all or select asset types
Build	Built by manually adding assets to the list and setting their order in the list.	Built by manually assigning assets to and setting their confidence values for each segment’s list.	Built in realtime by code in the assigned “CSElement” asset.	Built by adding assets to each segment’s list in the parent asset’s “New” and “Edit” forms.

Asset Selection Factors

When Engage determines which assets are the most appropriate to recommend to the current visitor through a given recommendation, it multiplies each asset's **individual rating** in the segment by the **confidence** value assigned to the asset in the recommendation to obtain the asset's **weighted** rating. The following sections describe these concepts in detail.

Ratings

An asset's individual rating establishes how important the asset is to the visitor belonging to a particular segment. You manually assign the rating to the asset in the asset's "New" or "Edit" form.

Note

Only flex assets can be rated for segments. Basic assets do not support ratings and are ignored by the recommendation if placed in it. Consult your administrator to make sure you are only placing flex assets in the recommendations you create.

You can assign three kinds of ratings to an asset:

Rating	Description
In Segment	Used when the current visitor is a member of a specific segment.
Out of Segment	Used when the current visitor is not a member of a specific segment.
When no segment ratings apply	Used when no segments are defined for the current site, or the asset is placed in a recommendation that does not recognize segments (Static Lists recommendation in List mode).

There is also a system default rating for flex assets or flex parents that have not been assigned any of these specific ratings. The system default is set to 50 unless you and your development team decide to change it (through an XML or JSP object method on your site pages). The system default represents the average or middle point in the rating scale for your site, which is why FatWire recommends that you keep the system default rating set to 50.

Range of Ratings

The valid range for individual ratings is 0 through 100. The individual values of 0 and 100 are special and affect an asset's rating as follows:

- An asset rating of 0 for a segment tells Engage to never recommend the asset to a member of the segment. For example, you might want to make sure that your site never recommends PCs or PC software to members of a segment named "Macintosh Users."

- An asset rating of 100 for a segment tells Engage to always recommend the asset to a member of the segment.

Inheritance of Ratings

Flex assets and flex parents inherit "In Segment," "Out of Segment," and "When No Segment Ratings Apply" ("fallback") ratings from their parents. The asset's or parent's **final rating** is the average of its individual rating (which is the system default rating if it has no individual rating) plus its inherited rating. The asset's inherited rating is the final rating of its parent, as illustrated by the following formula:

$$\text{Final rating} = \frac{\text{individual rating} + \text{inherited rating}}{2}$$

where,

individual rating = system default if custom rating is not specified

inherited rating = parent's final rating

For example:

Asset or Parent	Individual Rating	Inherited Rating	Final Rating
Asset Parent A (top-level group)	70	no rating inherited	**70**
Asset Parent B (child of Asset Parent A)	60	70	(60 + 70) / 2 = **65**
Asset 1 (child of Asset Parent B)	95	65	(95 + 65) / 2 = **80**

If the flex asset inherits a rating for a segment that it does not have an individual rating for, Engage averages the inherited rating with the system default rating (which is typically 50) to determine the final rating. For example:

Asset or Parent	Individual Rating	Inherited Rating	Final Rating
Asset Parent A (top-level group)	80	nothing inherited	**80**
Asset Parent B (child of Asset Parent A)	none, so the system default of 50 is used	80	(50 + 80) / 2 = **65**

Asset or Parent	Individual Rating	Inherited Rating	Final Rating
Asset 1 (child of Asset Parent B)	70	65	(70 + 65) / 2 = **67.5**

Because the values of 0 and 100 have special functions, the following rules apply to them when inheritance is concerned:

- If either the individual or the inherited rating is 0, the final rating is 0.
- If either the individual or the inherited rating is 100, the final rating is 100 unless the other value is 0.

If the current visitor belongs to more than one segment and the asset has ratings for those segments, the following rules apply:

- The highest of the ratings is the final rating.
- If one of those ratings is 0, the final rating is 0.

Confidence

Confidence in Engage indicates how likely your visitors are to want to view a particular piece of content; thus, Engage uses confidence values assigned to each asset in a recommendation to decide how often a piece of content is to be recommended to the visitor. When a recommendation assesses an asset against a given segment, the asset's rating (either individual or final, depending on the scenario) is multiplied by the confidence value for that segment in the recommendation to produce the asset's weighted rating. The weighted rating is then used by the recommendation to determine how relevant the asset is to the current visitor. Confidence is therefore a scaling factor for the asset's rating. Keep in mind that neither an asset's individual rating nor its confidence value alone can be used to recommend the asset to the visitor; the weighting process applies to all assets assigned to a given recommendation.

Note that when an asset is assessed by multiple recommendations, its respective weighted ratings are calculated independently of one another; that is, the confidence values assigned to the asset in one recommendation do not affect the asset's rating "visible" to the other recommendation. For example, if an asset has an individual rating of 80, a 60% confidence for Segment A in Recommendation 1, and a 90% confidence for Segment A in Recommendation 2, both recommendations use the asset's individual rating of 80 when calculating its respective weighted rating.

The way confidence is assigned depends on the type of recommendation:

- For Static Lists recommendations in List mode, Engage automatically assigns a confidence value to each asset in the list based on the asset's position in the list: the first asset on the list gets a value of 100%, the second 99%, the third 98% and so on, in descending order.
- For Static Lists recommendations in Recommendation mode, you manually assign confidence values to assets for each segment in the recommendation via the recommendation's "New" or "Edit" forms.

- For Related Items recommendations, you manually assign confidence values to assets for each segment in the recommendation via the parent asset's "New" or "Edit" form.
- For Dynamic Lists recommendations, confidence values are returned to Engage by the selected "CSElement" asset and assigned to the respective assets automatically.

Range of Confidence Values

Because confidence is a scaling factor, it is presented as a percentage. The valid range of percentage values is 0 through 100. The values of 0% and 100% affect an asset's rating as follows:

- A confidence value of 0% means the asset will never be returned by that recommendation because the asset's rating is multiplied by 0% (0), which results in a rating of 0.
- A confidence value of 100% means the asset's rating is not scaled or affected by the confidence at all because the asset's rating is multiplied by 100% (1).

Inheritance of Confidence Values

Typically you designate relationships between flex assets and assign a confidence value to that relationship at the parent level because assets inherit the confidence value assigned to their parents by the recommendation.

If the asset has more than one confidence value for the same recommendation, Engage uses the highest value (even if one of those values is 0); it does not average them.

Selection Criteria

Note

List mode Static Lists recommendations do not support the Random selection criterion.

Selection Criteria is a configuration option that allows you to specify how the "Recommendation" asset selects assets to be returned to the template that requests them.

The method that you select for **Selection Criteria** determines how Engage selects assets from the database. There are two **Selection Criteria** methods:

- **Highest** – Engage selects the assets with the highest weighted rating for the current segments (that is, the segments that the current visitor belongs to).
- **Random** – Engage uses a weighted random algorithm (operating on the assets' weighted ratings) to select the assets from the list. Use this selection criterion to design a recommendation that rotates its message, keeping the recommended assets current or different each time a visitor returns to the site page. The selections are still based on the weighted ratings of the assets, however, because this is a weighted random algorithm. The higher the asset's rating for the current segment, the more likely it is to be chosen.

For example, a template is coded to call a recommendation that uses the random selection criteria method for one asset. The possibilities include these three products:

Asset	Weighted Rating
Movie 123	95
Movie ABC	87
Movie RedYellowBlue	65

The probability of the product being selected is its rating divided by the sum of all the ratings (247). Therefore, “Movie 123” has a 38% chance of being selected, “Movie ABC” has a 35% chance, and “Movie RedYellowBlue” has a 26% chance.

Sort Criteria

Sort Criteria is a configuration option that allows you to specify the order in which the template should render the assets returned to it by the recommendation. **Sort Criteria** are applied to the list of returned assets after the **Selection Criteria** method determines which assets to include in the list.

By default, you can sort the list of selected assets by the following attributes:

- **“_ASSETTYPE_”** – sorts the assets in the list alphabetically by asset type. For example, “Article” assets are first, then Image assets, and then the Product assets. (By default, assets are sorted in ascending order; you can reverse the sort order by selecting the **Descending** sort direction.)
- **“_CONFIDENCE_”** – sorts the returned assets by their confidence values.
- **“_RATING_”** – sorts the returned assets by their rating (individual or final, if applicable).

For each attribute, you can specify either ascending or descending sort order.

Sort options specific to the asset types available on your site are set up by your administrator. As an example, a site could be set up to include the following attribute types and corresponding attributes:

- **“Product Attribute”** – sorts by product attributes such as Price, SKU, or Color, and so on (depending on which product attributes are used in your system).
- **“Content Attribute”** – sorts by content attributes such as Headline, Filename, or Author, and so on (depending on which content attributes are used in your system). Note that content attribute means only those attributes that are used to define flex assets, not basic assets.

You can add as many sort options as you want to a recommendation. Engage uses these options in the order in which they appear on the recommendation form.

Asset Recommendation Processes

The following section explains how Engage determines which assets to pass to the template for each type of recommendation.

Static Lists in List Mode

List mode allows you to create a simple static list with the marketing options (such as selection and sort criteria) fixed to specific values (see table on page 233 for this information). When a List mode Static Lists recommendation is invoked by a template, all assets in the list will always be displayed in the order you specify within the "Recommendation" asset.

- If a template invokes a List mode Static Lists recommendation but it does not ask for a specific number of assets, the recommendation examines the ratings of the assets in the recommendations and eliminates assets with a rating of 0. The recommendation then returns all the assets on its list that are not rated 0, regardless of the segment(s) the visitor belongs to.
- When a template invokes a List mode Static Lists recommendation **and** it requests fewer assets than are on the recommendation's list, Engage recommends the assets with the highest weighted ratings (the random weighted algorithm is not supported in List mode).

The recommendation calculates the weighted ratings of the assets on its list as follows:

1. It examines each asset on the recommendation's list to determine whether that asset has a "No segment ratings apply" rating.
2. For each asset that has such a rating, Engage multiplies the rating by the confidence value for the asset (determined by the asset's position in the list). This value is the asset's weighted rating. For example, if the rating is 90 and the confidence is 75%, it calculates the weighted rating to be 67.5 (that is, 90 x 0.75).
3. Engage recommends the assets using the **Highest** selection criterion to determine which assets to return (the **Random** selection criterion is not supported in List mode). For more information on selection criteria, see the section "Selection Criteria," on page 237.

Static Lists in Recommendation Mode

In contrast to List mode, when a **Recommendation** mode Static Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings, not by the list order. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

- If a template invokes a Recommendation mode Static Lists recommendation but it does not ask for a specific number of assets, the recommendation examines the ratings of the assets in the recommendations and eliminates assets with a rating of 0. The recommendation then returns all the assets on its list that are not rated 0 for the current visitor.
- When a template invokes a Recommendation mode Static Lists recommendation **and** it requests fewer assets than are on the recommendation's list, Engage uses the **Selection Criteria** method specified in the recommendation to determine which assets to return.

The recommendation calculates the weighted ratings of the assets on its list as follows:

1. It determines which segments the current visitor belongs to.
2. It examines each asset on the recommendation's list to determine whether that asset has a rating for any of the segments that apply to the current visitor.
3. For each asset that has a rating for the segment(s) the current visitor belongs to, Engage multiplies the rating by the confidence value assigned in the recommendation for that asset. This value is the asset's weighted rating. For example, if the rating is 90 and the confidence is 75%, it calculates the weighted rating to be 67.5 (that is, 90 x 0.75).
4. If the **Selection Criteria** method is **Highest**, Engage recommends the assets with the highest weighted ratings. If the **Selection Criteria** method is **Random**, Engage uses a weighted random algorithm to select and return the recommended assets (based on their weighted ratings). For more information on selection criteria, see the section "Selection Criteria," on page 237.

Dynamic Lists

When a Dynamic Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

- If a template invokes a Dynamic Lists recommendation but it does not ask for a specific number of assets, the recommendation returns all the assets it obtains from the generated list. Engage does not calculate weighted ratings in this case.
- If a template invokes a Dynamic Lists recommendation **and** it requests fewer assets than are on the recommendation's list, Engage uses the **Selection Criteria** method specified in the recommendation to determine which assets to return.

Engage calculates the asset ratings as follows:

1. It determines which segments the current visitor belongs to.
2. It examines each asset returned by the element to determine whether that asset has a rating for any of the segments that apply to the current visitor.
3. For each asset that has an appropriate rating, it multiplies the rating by the confidence value for that asset (from the element). This value is the asset's final rating. For example, if the rating is 90 and the confidence is 0.75, it calculates the final rating to be 67.5 (90 x 0.75). If the element does not return a confidence value, Engage assigns a confidence value of 1 to each asset in the list.
4. If the **Selection Criteria** method is **Highest**, Engage recommends the assets with the highest final ratings. If the **Selection Criteria** method is **Random**, Engage uses a weighted random selection to return the recommended assets.

Related Items

In this example, a template that displays a product description for a “Movie” asset named Movie 123 invokes a Related Items recommendation named “Cross-Sell.” The template for “Cross-Sell” asks for five assets that have the “Cross-Sell” relationship with Movie 123.

Engage does the following:

1. Determines which segments the current visitor belongs to.
2. Examines the **Related Items** section of the asset form for Movie 123 to determine which assets are listed for the “Cross-Sell” recommendation. It also examines the related assets for all parents of Movie 123.
3. Creates a preliminary list of all “Movie” and “Product” assets that have the “Cross-Sell” relationship with Movie 123. (This list includes all the “Product” assets that inherited this relationship from their parents.) This list also determines the confidence value for each asset.
4. Examines the **Ratings** section on the asset forms for all of the “Movie” and “Products” assets on the preliminary list.
5. Constrains the preliminary list to include only those “Movie” and “Product” assets that have applicable ratings for the segments that the current visitor belongs to.
6. Multiplies the rating by the confidence for each asset on the constrained list.
7. If the **Selection Criteria** method is **Highest**, Engage recommends the five assets with the highest final ratings. If the **Selection Criteria** method is **Random**, Engage uses a weighted random algorithm (operating on the assets’ weighted ratings) to return the five recommended assets.

Creating Recommendation Assets

Note

Typically, marketing people create “Recommendation” assets and set confidence values for assets referenced by Static Lists and Related Items recommendations. (Confidence for Dynamic Lists recommendations is coded into the template that renders the assets being recommended).

Business users assign individual ratings to assets referenced by recommendations created by marketing.

Recommendation Development Overview

The basic steps for setting up recommendations are as follows:

1. Designers and developers meet with the marketing team to define all the merchandising messages that you want to display on your site and to plan how to represent those messages using recommendation and promotion assets.
2. The designers and developers design and code templates for the recommendations. If Dynamic Lists recommendations will be used, they also write “CSElement” assets designed to generate dynamic lists.
3. Marketing then uses Engage Recommendation forms to create “Recommendation” assets (that is, name and configure the recommendations).
4. Using the Engage flex asset forms, you rate how important the assets are to each segment, and, therefore, to the individual visitors who become members of those segments. (Typically, you assign ratings to flex parents instead of to individual flex assets.)

   For each Related Items recommendation, you assign to flex assets the assets with relationships that are defined by that recommendation. (Typically, you specify relationships for flex parents instead of for individual flex assets.)

This section describes how to create and configure “Recommendation” assets (step 3 above). The section “Configuring Assets to Be Recommended,” on page 263 describes how to assign ratings to assets and how to assign flex assets to flex parent assets via the relationships defined in a Related Items recommendation (step 4 above).

This section covers the following procedures:

- Creating Static Lists Recommendations in List Mode
- Creating Static Lists Recommendations in Recommendation Mode
- Creating Dynamic Lists Recommendations
- Creating Related Items Recommendations

Creating Static Lists Recommendations in List Mode

List mode allows you to create a simple static list with the marketing options (such as selection and sort criteria) fixed to specific values (see table on page 233 for this information). When a List mode Static Lists recommendation is invoked by a template, all assets in the list will always be displayed in the order you specify within the “Recommendation” asset.

To create a Static Lists recommendation in List mode

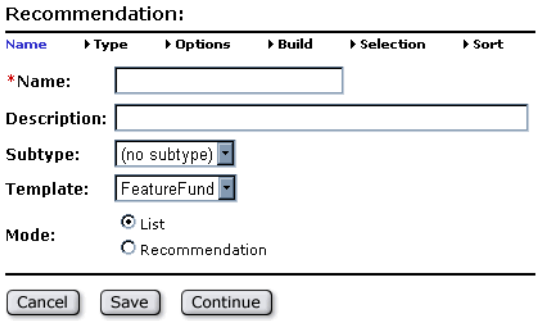
Note

You can click **Save** as you progress through the sections of the "New Recommendation" form in this procedure to save the changes you have made up to and in that section.

Before you can assign assets to a recommendation, you should add the source asset(s) to your Active List for easy retrieval during the creation of the recommendation.

1. Expand the "Create Content" portlet.
2. In the "Create Content" portlet, click **New Recommendation**.

   Content Server displays the "New Recommendation" form. Notice the names of the form's sections near the top. When you create a new "Recommendation" asset, the **Name** section of the form is displayed.



Note

When creating or editing a "Recommendation" asset, you can switch between the sections of the "New" or "Edit" form by clicking the name of the section you want to switch to.

3. In the **Name** section of the "New Recommendation" form, do the following:
   a. In the **Name** field, enter a unique, descriptive name for the list. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
   b. In the **Description** field, enter a brief description of the list. You can enter up to 128 alphanumeric characters.
   c. In the "Subtype" drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).

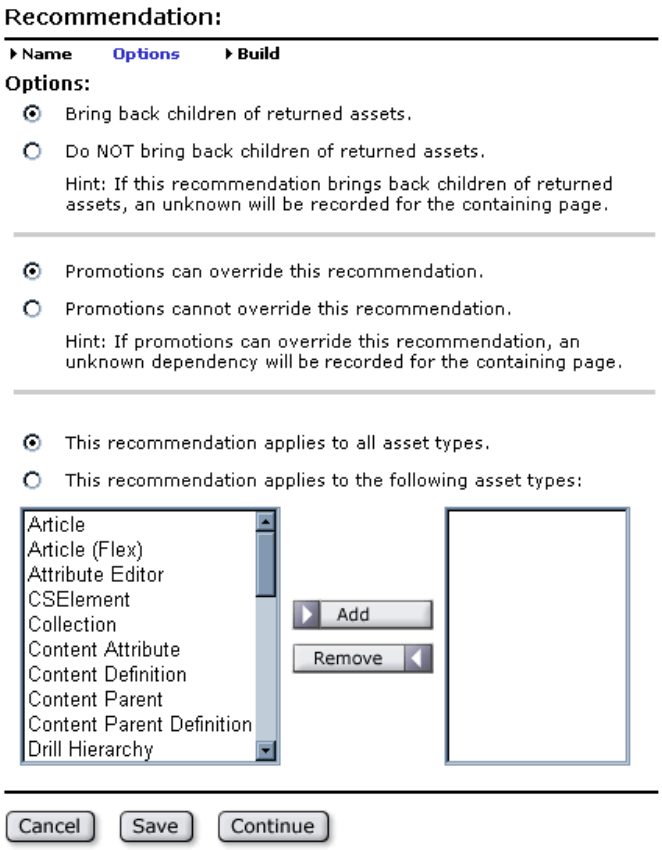
d. In the “Template” drop-down list, select a template for the recommendation.

> **Note**
>
> If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations on your site. Consult your developers for information on recommendation templates.

e. In the **Mode** field, select the **List** radio button.

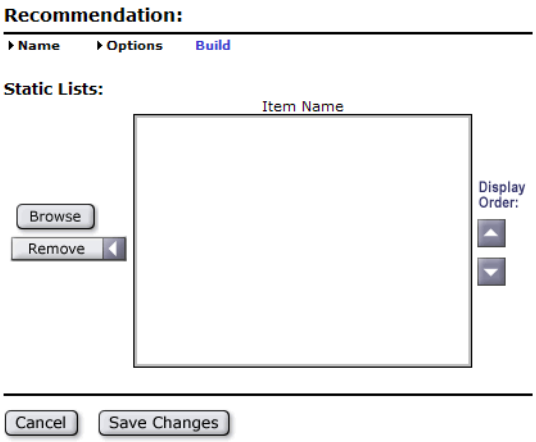
f. Click **Continue**.

Content Server displays the “Options” section of the “New Recommendation” form:



4. In the “Options” section, set the options appropriately for the list’s intended purpose. When you are done, click **Continue**.

Content Server displays the **Build** section of the "New Recommendation" form:



5. Add assets to the recommendation:
   a. Click **Browse**.

      Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

   b. In the drop-down list in the pop-up window, select the asset type of the asset(s) you want to add to the list.

   c. In the **Search For** field in the **Search** tab, enter criteria identifying the asset(s) and click **Search**.

   d. In the list of search results, select the check box next to each desired asset.

      Note

      You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

   e. Click **Select**.

      The pop-up window automatically closes and Content Server adds the selected assets to the list.

6. (Optional) You can change the order in which the assets in the list are organized by selecting the asset(s) in the list and clicking the up or down arrow button to move the asset(s) up or down the list. You can select multiple assets by **Ctrl-clicking** each desired asset; you can also select a range of assets by **Shift-clicking** the first and last assets in the range.

7. Click **Save**.

Creating Static Lists Recommendations in Recommendation Mode

In contrast to List mode, when a Recommendation mode Static Lists recommendation is invoked by a template, the order of the displayed assets is determined by segments and ratings, not by the list order. Furthermore, the application of segments and ratings can result in some assets in the list being filtered out entirely.

Keep the following in mind:

- If you are going to use segments, make sure you know which assets belong in which segments.
- If the segments you need do not exist, you can create them (assuming you have the appropriate permissions). See Chapter 17, "Grouping Visitors into Segments" for information on creating and configuring segments.
- You should know in advance the confidence values (in segment, out of segment, and when no segments apply) you will assign to the assets you are adding to the list.

Before you can assign assets to a recommendation, you should add the source asset(s) to your Active List for easy retrieval during the creation of the recommendation.

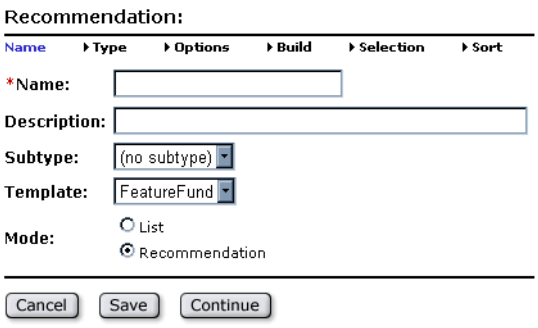
To create a Static Lists recommendation in Recommendation mode

Note

You can click **Save** as you progress through the sections of the "New Recommendation" form in this procedure to save the changes you have made up to and in that section.

1. Expand the "Create Content" portlet.
2. In the "Create Content" portlet, click **New Recommendation**.

   Content Server displays the "New Recommendation" form. Notice the names of the form's sections near the top. When you create a new "Recommendation" asset, the **Name** section of the form is displayed first:



Note

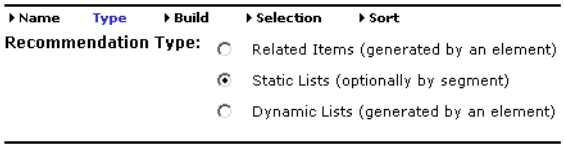
When creating or editing a "Recommendation" asset, you can switch between the sections of the "New" or "Edit" form by clicking the name of the section you want to switch to.

3. In the **Name** section of the "New Recommendation" form, do the following:
   a. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
   b. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.
   c. In the "Subtype" drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).
   d. In the "Template" drop-down list, select a template for the recommendation.

> **Note**
>
> If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

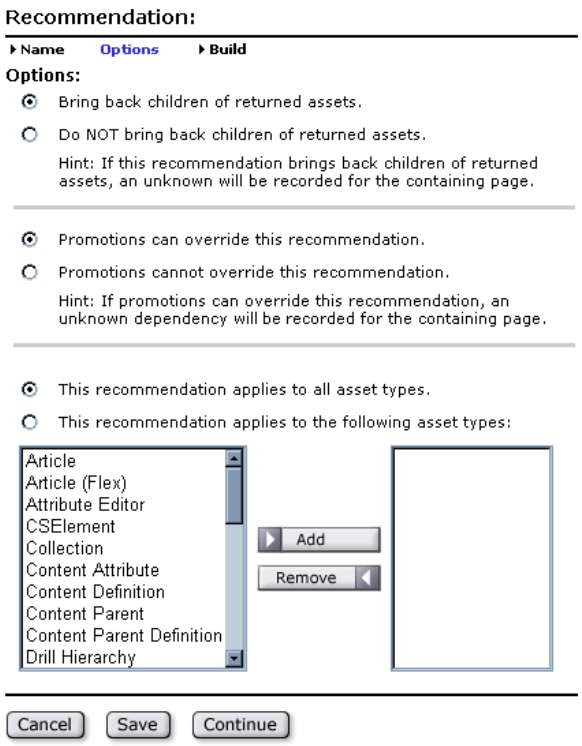
   e. In the **Mode** field, select the **Recommendation** radio button.
   f. Click **Continue**.

      Content Server displays the **Type** section of the "New Recommendation" form:



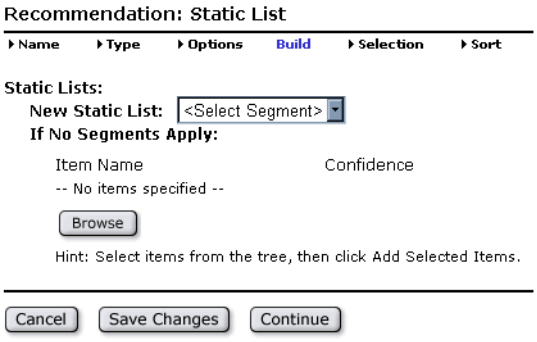
4. In the **Type** section of the "New Recommendation" form, do the following:
   a. Select **Static Lists**.
   b. Click **Continue**.

Content Server displays the **Options** section of the "New Recommendation" form:



5. In the **Options** section of the "New Recommendation" form, do the following:
   a. Set the options appropriately for the recommendation's intended purpose.
   b. Click **Continue**.

      Content Server displays the **Build** section of the "New Recommendation" form:



6. In the **Build** section of the "New Recommendation" form, do the following:
   a. In the "New Static List" drop-down list, select a segment.

      Content Server creates a new static list for the segment and displays it in the form.
   b. Click **Browse**.

Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

c. In the drop-down list in the pop-up window, select the asset type of the asset(s) you want to add to the list.

d. In the **Search For** field in the **Search** tab, enter criteria identifying the asset(s) and click **Search**.

e. In the list of search results, select the check box next to each desired asset.

Note

You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

f. Click **Select**.

The pop-up window automatically closes and Content Server adds the selected assets to the list.

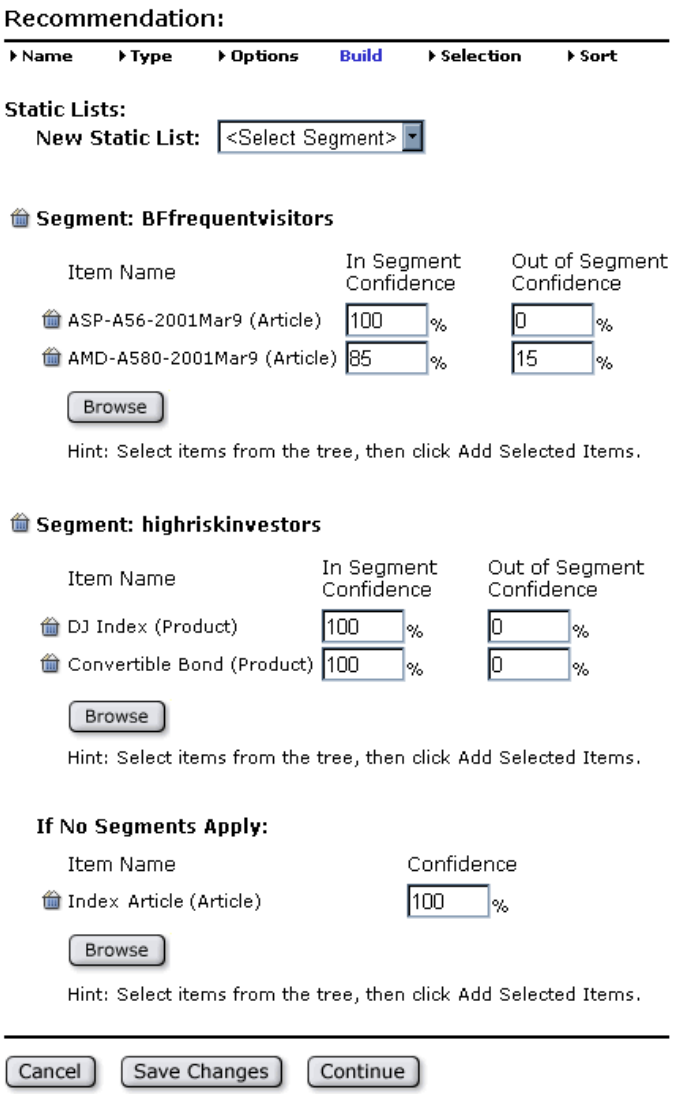
g. Assign a confidence value for each asset, both **In Segment** and **Out of Segment**. Confidence is a weighting factor for the recommendation to use in determining which assets to return for the current visitor when that visitor is a member of the segment and when that visitor is not a member of the segment. The defaults are 100% and 0% respectively.

For additional information, see “Confidence,” on page 236.

h. Repeat steps a – g for as many segments as you want to include. After you select a segment, it no longer appears in the drop-down list.

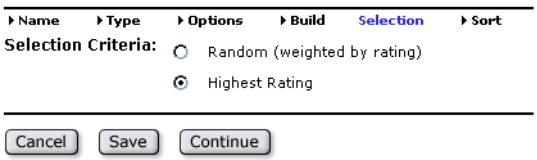
i. (Optional) Repeat steps a – g for the **If No Segments Apply** category and assign confidence values as appropriate.

The completed form will look similar to the following:



j. Click **Continue**.

Content Server displays the **Selection** section of the "New Recommendation" form:

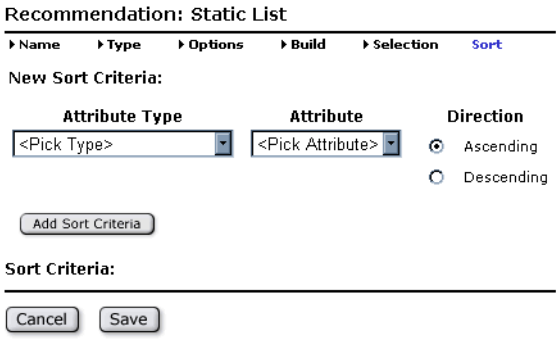


7. In the **Selection** section of the "New Recommendation" form, do the following:

a. Choose the selection criterion for the recommendation. For more information, see the section "Selection Criteria," on page 237.

b. Click **Continue**.

Content Server displays the **Sort** section of the "New Recommendation" form:



8. In the **Sort** section of the "New Recommendation" form, do the following:

a. In the "Attribute Type" drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

For more information, see the section "Sort Criteria," on page 238.

b. In the "Attribute" drop-down list, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in step a, the Attribute field will contain the options, **_ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

c. In the **Direction** field, choose whether the sort direction should be ascending or descending.

d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.

e. (Optional) To add more sort criteria, repeat steps a – d. Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.

f. When you have selected the desired sort criteria, click **Save**.

Creating Dynamic Lists Recommendations

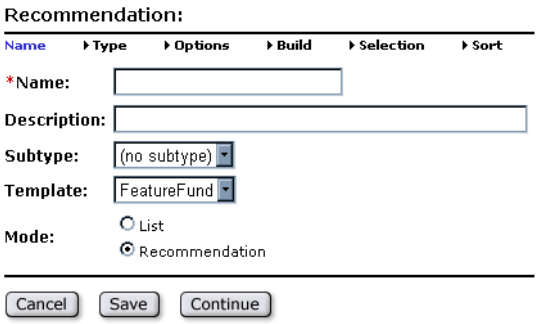
Note

Before beginning this procedure, Consult your developers to find out which “CSElement” asset(s) should be used with the Dynamic Lists recommendation(s) you want to create.

To create a Dynamic Lists recommendation

1. Expand the “Create Content” portlet.
2. In the “Create Content” portlet, click **New Recommendation**.

   Content Server displays the “New Recommendation” form. Notice the names of the form’s sections near the top. When you create a new “Recommendation” asset, the **Name** section of the form is displayed first:



Note

When creating or editing a “Recommendation” asset, you can switch between the sections of the “New” or “Edit” form by clicking the name of the section you want to switch to.

3. In the **Name** section of the “New Recommendation” form, do the following:
   a. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
   b. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.
   c. In the “Subtype” drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty.

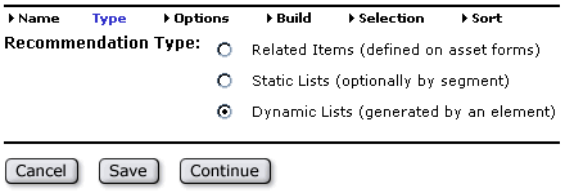
d. In the “Template” drop-down list, select a template for the recommendation.

> **Note**
>
> If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

e. In the **Mode** field, select the **Recommendation** radio button.

f. Click **Continue**.

Content Server displays the **Type** section of the “New Recommendation” form:

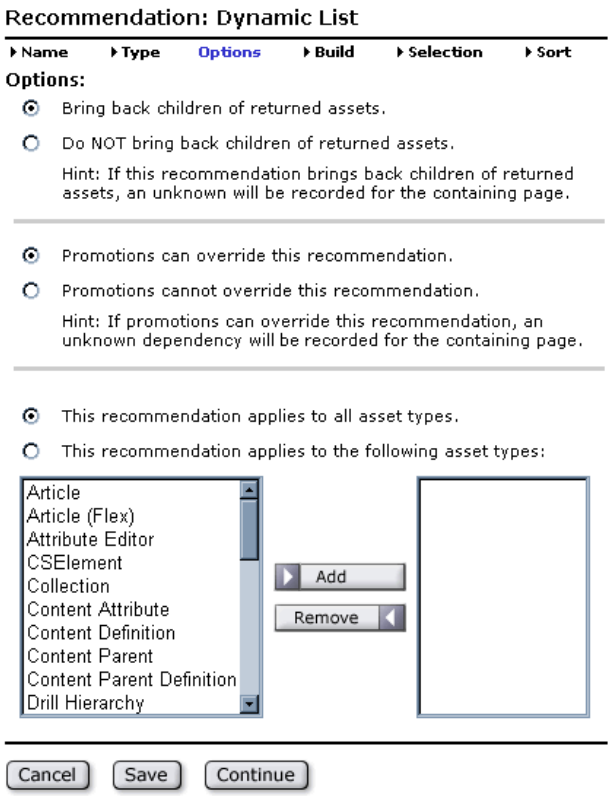


4. In the **Type** section of the “New Recommendation” form, do the following:

a. Select **Dynamic Lists**.

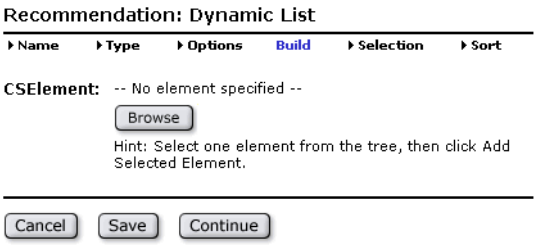
b. Click **Continue**.

Content Server displays the **Options** section of the "New Recommendation" form:



5. In the **Options** section of the "New Recommendation" form, do the following:
   a. Set the options appropriately for the recommendation's intended purpose.
   b. Click **Continue**.

      Content Server displays the **Build** section of the "New Recommendation" form:



6. In the **Build** section of the "New Recommendation" form, assign the desired "CSElement" asset to the recommendation. Do the following:
   a. Click **Browse**.

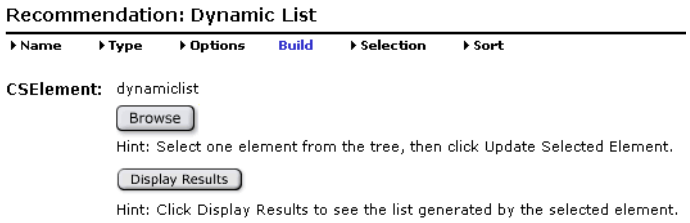
      Content Server displays a pop-up window that allows you to find and select the desired "CSElement" asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

b. In the **Search For** field in the **Search** tab, enter criteria identifying the "CSElement" asset and click **Search**.

c. In the list of search results, click the desired asset.

> **Note**
>
> You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

The pop-up window automatically closes and Content Server refreshes the form showing the added "CSElement" asset:



If you want to replace the currently chosen "CSElement" asset, repeat steps a – c to select a different asset.

d. Click **Display Results** to view the list that the element will currently generate.

A form similar to the following appears:

Asset Name	Asset ID	Asset Type	Confidence
Income (Class A, Max Load)	993403844495	Products	100.0%
Domestic Equity Portfolio	993403844773	Products	100.0%
Emerging Markets Equity Fund	993403845336	Products	100.0%
Small Cap	993403845588	Products	100.0%
Mid Cap Stock Fund	993403845840	Products	100.0%
Global Fund	993403846085	Products	100.0%
EastSouth Fund	993403846326	Products	100.0%
Tech Titans	993403846578	Products	100.0%
Financial Titans Fund	993403846823	Products	100.0%
Large Cap Growth (Class A, Max Load)	993403847128	Products	100.0%
International Titan Funds	993403847744	Products	100.0%
Ero Titans	993403847970	Products	100.0%
Worldwide Spectrum	993403848918	Products	100.0%
Small Cap (Class A, Max Load)	993403849555	Products	100.0%
Convertible Bond	993403849979	Products	100.0%
Small Cap Growth	993403850319	Products	100.0%
DJ Index	993403851044	Products	100.0%
Ultra Risk Int'l	993403851295	Products	100.0%
Small Gain Tax Hedge	993403851802	Products	100.0%
Energy Sector	993403852228	Products	100.0%
Financial Services Specialty	993403852438	Products	100.0%
Health Care	993403852646	Products	100.0%
Communications	993403853236	Products	100.0%
Utilities Specialist	993403853448	Products	100.0%
International Index Fund	993403854142	Products	100.0%
Select Industrial Equipment	993403855059	Products	100.0%
Tax-Managed U.S. 5-10 Value	993403855278	Products	100.0%
Doculab Super Fund	993559376745	Products	100.0%

The element is required to return a list of a specific type containing these columns:

- **Asset Name** – the name of the asset, which is guaranteed to be unique for the site
- **Asset ID** – generated identifier of the asset
- **Asset Type** – the name of the asset type (for example, “Products”)
- **Confidence** – a value that is either calculated by the developer, or assigned by Engage as 1 (100%)

Remember that the list is dynamic, so the list contents are likely to change if assets have changed in your database when the recommendation is invoked by the template. If you select another “CSElement” asset, the currently displayed list results will be cleared.

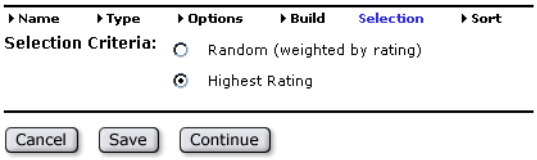
When you click **Display Results**, several other outcomes are possible:

- The element fails to return the expected list type.
- The returned list is missing a required column.
- The element encountered the displayed error condition.
- The element fails to return any assets (not necessarily an error; the expected assets may not yet exist, in which case, you should contact your administrator).

  If you encounter any of these conditions, select another “CSElement” asset and try again or consult your developers to troubleshoot the faulty “CSElement” asset.

e. Click **Continue**.

Content Server displays the **Selection** section of the “New Recommendation” form:

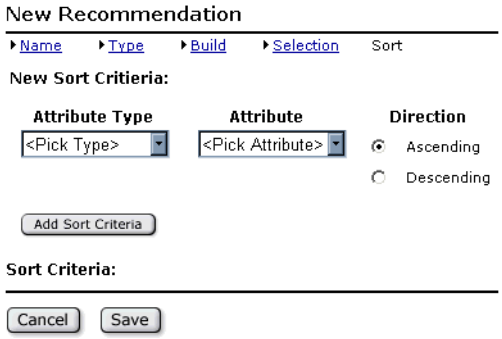


7. In the **Selection** section of the “New Recommendation” form, do the following:

a. Choose the selection criterion for the recommendation. For more information, see the section “Selection Criteria,” on page 237.

b. Click **Continue**.

Content Server displays the **Sort** section of the “New Recommendation” form:



8. In the **Sort** section of the "New Recommendation" form, do the following:
   a. In the "Attribute Type" drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

      For more information, see the section "Sort Criteria," on page 238.

   b. In the "Attribute" drop-down list, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in steps a, the Attribute field will contain the options, **_ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

      Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.

   c. In the **Direction** field, choose whether the sort direction should be ascending or descending.

   d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.

   e. (Optional) To add more sort criteria, repeat steps a – d. Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.

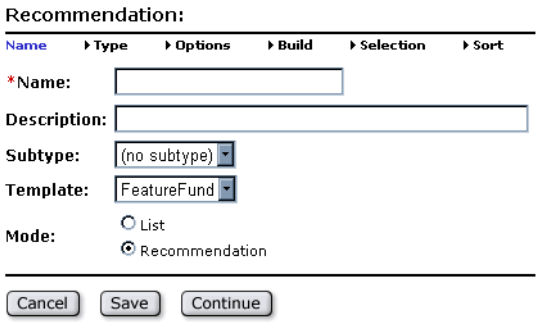
   f. When you have selected the desired sort criteria, click **Save**.

Creating Related Items Recommendations

To create a Related Items recommendation

1. Expand the “Create Content” portlet.
2. In the “Create Content” portlet, click **New Recommendation**.

   Content Server displays the “New Recommendation” form. Notice the names of the form’s sections near the top. When you create a new “Recommendation” asset, the **Name** section of the form is displayed first:



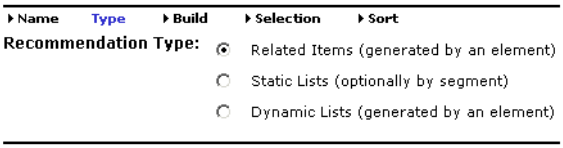
> **Note**
>
> When creating or editing a “Recommendation” asset, you can switch between the sections of the “New” or “Edit” form by clicking the name of the section you want to switch to.

3. In the **Name** section of the “New Recommendation” form, do the following:
   a. In the **Name** field, enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.
   b. In the **Description** field, enter a brief description of the recommendation. You can enter up to 128 alphanumeric characters.
   c. In the “Subtype” drop-down list, select a subtype for the recommendation. A subtype is a way of categorizing lists. If the design team did not define subtypes for this type of recommendation, the drop-down list is empty. Consult your developers for information on available recommendation subtypes (if any).
   d. In the “Template” drop-down list, select a template for the recommendation.

   > **Note**
   >
   > If the **Template** field does not include a drop-down list, it means that no templates have been created for recommendations. Consult your developers for information on creating templates for recommendations.

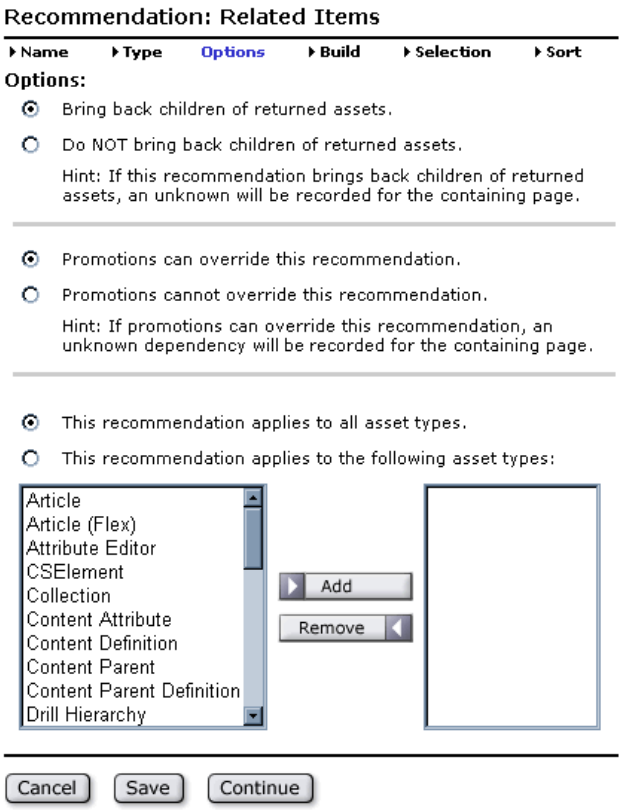
   e. In the **Mode** field, select the **Recommendation** radio button.
   f. Click **Continue**.

Content Server displays the **Type** section of the "New Recommendation" form:



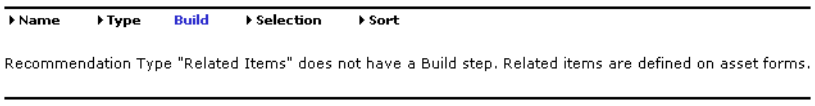
4. In the **Type** section of the "New Recommendation" form, do the following:
   a. Select the **Related Items** radio button.
   b. Click **Continue**.

   Content Server displays the **Options** section of the "New Recommendation" form:



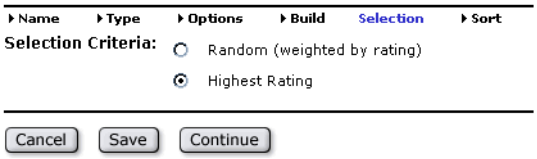
5. In the **Options** section of the "New Recommendation" form, do the following:
   a. Set the options appropriately for the recommendation's intended purpose.
   b. Click **Selection** at the top of the form (Related Items recommendations have no "Build" step).

   If you click **Continue**, the following message appears:



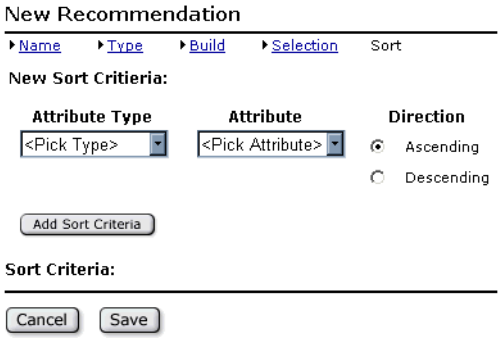
In such a case, click **Continue** again to go to the **Selection** section of the form.

Content Server displays the **Selection** section of the "New Recommendation" form:



6. In the **Selection** section of the "New Recommendation" form, do the following:
   a. Choose the selection criterion for the recommendation. For more information, see the section "Selection Criteria," on page 237.
   b. Click **Continue**.

      Content Server displays the **Sort** section of the "New Recommendation" form:



7. In the **Sort** section of the "New Recommendation" form, do the following:
   a. In the "Attribute Type" drop-down list, select the type of attribute by which you want to sort the asset list. By default, only the **Special** attribute type is available, allowing you to sort by asset type, confidence, and rating. Attribute types specific to the nature of the assets on your site are set up by the administrator and developers.

      For more information, see the section "Sort Criteria," on page 238.
   b. In the "Attribute" drop-down list, select the attribute by which you want to sort the asset list. The contents of the list depend on the option that you selected in the **Attribute Type** field. For example, if you selected the **Special** attribute type in step a, the Attribute field will contain the options, **_ASSETTYPE_**, **_CONFIDENCE_**, and **_RATING_**.

      Note that attributes specific to the nature of the assets on your site must be set up by the administrator and developers before you can use them.
   c. In the **Direction** field, choose whether the sort direction should be ascending or descending.
   d. Click **Add Sort Criteria**. Your criteria appear at the bottom of the form.
   e. (Optional) To add more sort criteria, repeat steps a – d. Be sure to add the new sort criteria in the order in which you want Engage to sort the assets in the list. For example, you might want to sort assets first by asset type, and then by rating.

f. When you have selected the desired sort criteria, click **Save**.

This recommendation now appears in the Related Items section of the "New" and "Edit" forms for flex assets and flex parent assets. You can now configure relationships for flex assets.

For more information, see "Configuring Asset Relationships Using Related Items Recommendations," on page 265.

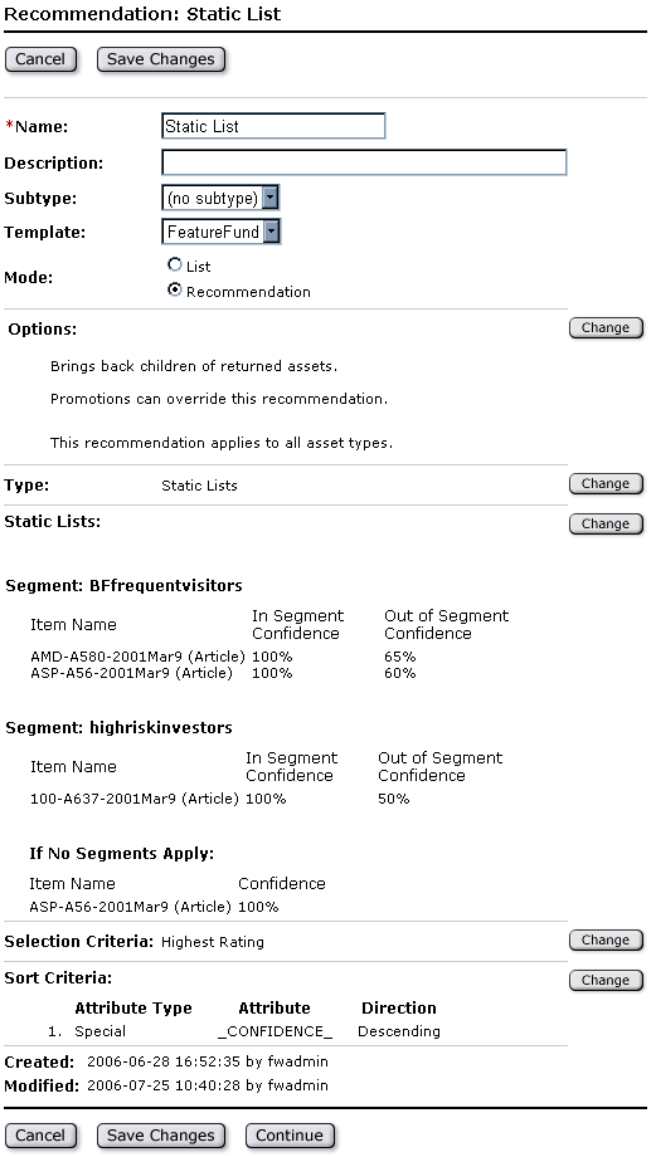
Editing Recommendation Assets

To edit a "Recommendation" asset

1. Find the "Recommendation" asset you want to edit, and open its "Edit" form:
   a. Expand the "Find Content" portlet.
   b. In the "Search" form, select **Find Recommendation**.
   c. Enter the desired search criteria (if any) and click **Search**.
   d. In the search results list, navigate to the desired asset and click its "Edit" (pencil) icon.

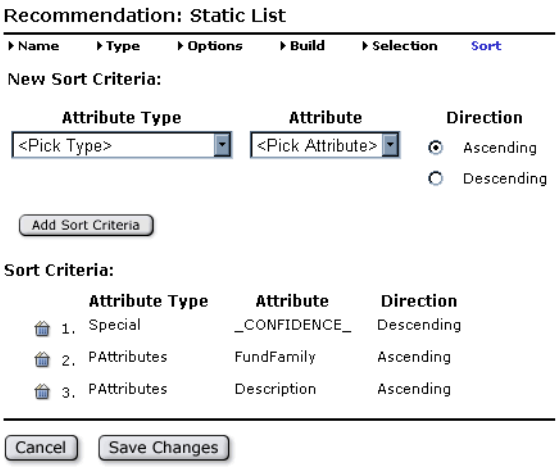
   For more information on searching, see the section see Chapter 7, "Searching for Assets."

   Content Server displays the recommendation's "Edit" form.



2. Click the **Change** button next to the section you want to edit. For example, to edit the sort criteria, click the corresponding button.

   Content Server displays the corresponding section of the recommendation's "Edit" form with the current configuration options preselected:



3. Make your edits and click **Save Changes** to complete the operation.

Configuring Assets to Be Recommended

The next step is to configure the segment ratings and asset relationships for the assets that you want to promote using recommendations. Specifically, you need to use the flex asset and flex parent asset forms in Content Server's interface to do the following:

- Rate how important the assets and parent assets are to the members of each segment.
- Configure the asset relationships that are represented by the Related Items recommendations.

> **Note**
>
> Typically, business users configure assets to be recommended.

Assigning Ratings to an Asset

You can assign ratings to individual flex assets or to flex parents. FatWire recommends using asset parents to assign ratings, for the following reasons:

- It is much easier to manage the ratings for multiple assets if those assets reside in groups. In fact, it is often a good idea to create flex parents whose sole purpose is to assign ratings to child assets. You can make all of the assets that have identical rating conditions children of the same parent. Then, you can modify the ratings for all the child assets by making a single change.
- It is easier to compare the ratings for one group of assets to the ratings of another group than it is to compare the ratings of individual assets.

- Ratings are calculated more quickly because there are fewer assets with individual ratings; this speeds up system performance.

You should avoid using ratings to try to promote a specific flex asset in a specific circumstance. Instead, you should recommend specific assets, using either a Static Lists recommendation or a promotion to accomplish your goal.

Before you begin, be sure to complete the following tasks:

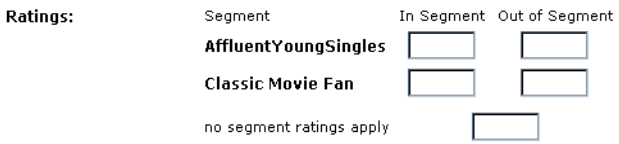
- Examine the segments to understand how they are defined and then determine which flex parents are significant for which segments.
- Ask your site developers whether they changed the system default rating for unrated assets. If they did not override the system default rating, that default rating is 50. This rating represents the average or middle point in your rating scale. Make a note of this value and keep it in mind while you rate assets. For example, rating an asset at lower than the system default rating means that it is unlikely that it would ever be recommended to a site visitor.

To assign ratings to an asset

1. Find the flex asset or flex parent you want to assign ratings to and open its "Edit" form:
   a. Expand the "Find Content" or "Find Documents" portlet.
   b. In the "Search" form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.
   d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

      For more information on searching, see Chapter 7, "Searching for Assets."

      Content Server displays the asset's "Edit" form.
2. In the asset's "Edit" form, scroll to the **Ratings** section. This section of the form lists all the segments that have been created for this site. For example:



3. Using a range of 0 through 100 (100 is the highest value), rate this asset for the segments in the list:
   - Enter a value in a segment's **In Segment** column to rate the asset for members of this segment.
   - Enter a value in a segment's **Out of Segment** column to rate the asset for visitors who are not members of this segment.
   - Enter a value in the **no segment ratings apply** field to assign an intrinsic rating to the asset; this rating is used when no segments are defined or the asset is assigned to a recommendation that does not recognize segments (List mode Static Lists recommendation).

   For more information about ratings, see "Ratings," on page 234.
4. Click **Save Changes**.

The segment ratings are now assigned to the asset.

Configuring Asset Relationships Using Related Items Recommendations

Before you begin, be sure to complete the following tasks:

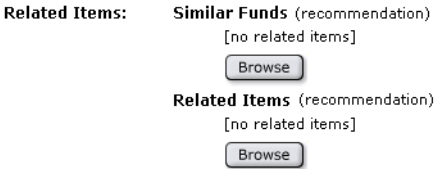
- Ask the developers to describe each of the Related Items recommendations so that you are familiar with the relationships the Related Items recommendations represent.
- Find out whether the recommendation is programmed to display a combination of flex assets, for example, “Product” and “Content” assets, so that you can configure the relationships correctly.

To configure relationships between assets

1. Find the flex parent that has the Related Items relationship(s) that you want to configure and open its “Edit” form:
   a. Expand the “Find Content” or “Find Documents” portlet.
   b. In the “Search” form, select the asset type of the asset you want to find.
   c. Enter the desired search criteria (if any) and click **Search**.
   d. In the search results list, navigate to the desired asset and click its **Edit** (pencil) icon.

      (For more information on searching, see Chapter 7, “Searching for Assets.”)

      Content Server displays the asset’s “Edit” form.
2. In the parent asset’s “Edit” form, scroll to the **Related Items** section, which will look similar to the image below:



3. Select the flex asset to which you want to configure the relationship.
   a. Click **Browse**.

      Content Server displays a pop-up window that allows you to find and select the desired asset. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.
   b. In the drop-down list in the pop-up window, select the asset type of the asset(s) you want to add to the list.
   c. In the **Search For** field in the **Search** tab, enter criteria identifying the asset(s) and click **Search**.

d. In the list of search results, select the check box next to each desired asset.

> **Note**
>
> You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

e. Click **Select**.

The pop-up window automatically closes and Content Server assigns the selected asset to the recommendation.

4. In the **Confidence** column next to an asset or asset parent, enter a confidence value that represents the weight of this relationship; confidence is expressed as a percentage ranging between 0 and 100. If you enter 0 or leave the field empty, the asset is excluded from this recommendation. For example:

For more information on confidence, see “Confidence,” on page 236.

5. Repeat step 4 for each asset in the list.
6. Repeat steps 3 – 5 for each recommendation listed in the Related Items section of the asset’s “Edit” form.
7. Click **Save Changes**.

   The asset relationships for the asset are now configured.

Verifying Recommendation Assets

To verify that you configured your “Recommendation” assets correctly, complete the following kinds of exercises:

- Create some test segments (see Chapter 17, “Grouping Visitors into Segments” for information on creating segments).
- In the flex asset and flex parent asset forms (for example, “Product” and “Product Parent”), assign ratings for the segments.
- Browse your site as a visitor and register yourself so that you qualify for the test segment.
- Examine the items that the “Recommendation” assets return.
- If you find problems, ask your developers to write test pages that isolate the problem.

Publishing Rated Flex Assets

Since asset ratings and relationships take effect only after they are published, you must approve the assets whose ratings and relationships you configured so they can be published to your delivery system.

For more information about approving and publishing assets, see Chapter 15, “Publishing.”

Chapter 19

Creating Promotions

Promotions are merchandising assets that offer some type of value or discount to your site visitors based on the products the visitors are buying and the segments they qualify for.

This chapter describes how promotions work and how to create them. It contains the following sections:

About Promotions

Promotions offer some type of value to your site visitors and customers based on the segments the visitors belong to and products that they buy or view. This value can be offered in several ways:

- A discount off the purchase price of the promoted products.
- A discount off the entire value of the shopping cart.
- A discount off shipping charges.
- A combination discount: a shipping discount with a price or cart discount.

You (the marketers) define your promotions by using the following criteria:

- The segment members who qualify for the promotion. Promotions can be offered to everyone or to visitors in selected segments.
- The products to promote.
- The value the customers receive when they purchase the promoted product.
- The duration of the promotion.
- The text or graphics (or both) that appear on the rendered site page that notifies visitors of the promotion.
- The location of the notification. Promotions are displayed on the live (public) site pages by replacing the recommendation that would normally appear there.

About Promotions and Recommendations

"Recommendation" assets are the delivery mechanism for all promotional content. When you create a promotion asset, you determine where you want the promotion to be displayed by selecting a "Recommendation" asset. The promotion replaces, or overrides, the recommendation and uses the template assigned to that recommendation to render the promotion in place of the recommendation that would normally be displayed.

Consequently, when Engage calculates the recommendation that a template asks for, it automatically checks whether there are any promotions that should override the recommendation. If so, it passes the promotion back to the recommendation's template and the template displays the promotion instead.

When Promotions Overlap

More than one promotion can use the same recommendation. What happens, then, when a visitor qualifies for more than one promotion and those promotions are using the same recommendation? It is easiest to explain with an example:

Example: Overlapping Promotions

There are two promotions running and both override the same recommendation:

Name:	End-of-Summer Sale
Discount:	10% off the entire contents of the visitor's shopping cart
Segments it applies to:	All segments

Name:	Printer Sale
Discount:	30% off all printers
Segments it applies to:	1) Home Office Worker 2) Back to School

Note

Promotions do not have segment ratings. Either the promotion applies to the segment or it doesn't.

Question: How does Engage decide which promotion to display if the visitor is from either the Home Office Worker segment or the Back to School segment? And which discount is applied?

Answer: Engage randomly selects which promotion to display (each has a 50/50 chance) but it applies both discounts. However, applying both discounts does not mean that printers are discounted twice.

Examine the contents of this shopping cart:

Item in Cart
box of paper
printer
toner cartridge

Before Engage applies the discounts, it lists and compares the promotions for all the items in the cart:

Item in Cart	Summer Sale	Printer Sale
box of paper	10%	
printer	10%	30%
toner cartridge	10%	

Engage then applies the largest discount to each item. Therefore, on the final bill, the box of paper and the toner cartridge are 10% off and the printer is 30% off (not 40%).

Question: Only one of the promotions was displayed: how do the shoppers understand the total on the invoices?

Answer: If you (the marketers) created the promotions correctly, you entered a meaningful description of the discount in the Engage discount forms. Those descriptions are printed on the invoice next to the discounted items.

Creating Promotions

To create a promotion

Before you create your promotions, be sure that you complete the following tasks:

- Ask your site developers for a list of all the recommendations in your system and a description of where each one is programmed to appear.
- If you are creating promotions that apply to specific segments, you and the other marketers must create the segments.

Step 1: Name and Define the Promotion

Note

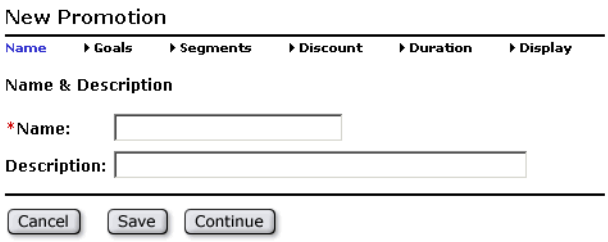
You can click **Save** as you progress through the sections of the "New Promotion" form in this procedure to save the changes you have made up to and in that section.

1. Expand the "Create Content" portlet.
2. In the "Create Content" portlet, click **New Promotion**.

Note

If **New Promotion** is not on the list, stop here. You do not have the permissions to create promotions. If you have questions about your permissions, contact your CS administrator.

Content Server displays the "New Promotion" form. Notice the names of the form's sections near the top. When you create a new "Promotion" asset, the **Name** section of the form is displayed:



Note

When creating or editing a "Promotion" asset, you can switch between the sections of the "New" or "Edit" form by clicking the name of the section you want to switch to.

3. In the **Name** section of the "New Promotion" form, do the following:
   a. Click in the **Name** field and enter a unique, descriptive name for the recommendation. You can enter up to 64 alphanumeric characters, including spaces. The first character must be a letter.

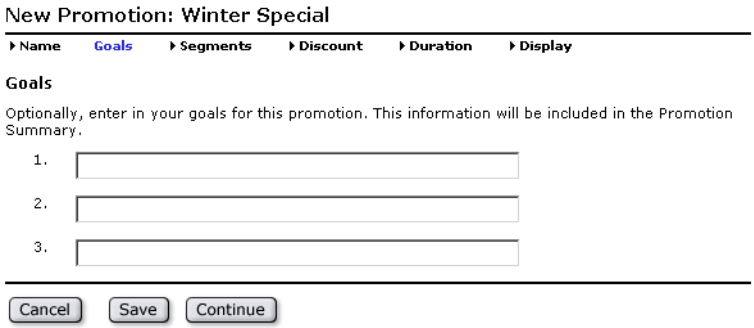
b. Click in the **Description** field and enter a brief description of the promotion. You can enter up to 128 alphanumeric characters.

c. Click **Continue**.

Content Server displays the **Goals** section of the "New Promotion" form.

Even though you can skip to any section of the "New Promotion" form, be sure that you create your first promotions in the sequence that takes place when you use the **Continue** button. Remember that the information you enter on any form is not saved to the database until you click **Save**.

Step 2: Define the Goals for the Promotion



A statement of goals is useful if your work is to be reviewed by others. Additionally, you might want to document why you designed the promotion a certain way after the promotion is complete.

In the **Goals** section of the "New Promotion" form, do the following:

1. Click in the first **Goal** field and describe a goal.
2. Enter goals in the second and third **Goal** fields, as needed.
3. Click **Continue**.

   The "Segment" form appears, as shown in the next step.

Step 3: Define Which Visitors Are Eligible for the Promotion

Use the **Segment** section of the "New Promotion" form to select the visitors who are eligible for the promotion. If you do not make any selections on this form, all visitors to the site are eligible for the promotion.

1. Do one of the following:
   - To offer the promotion to all visitors to the site, select **Apply to all visitors**.
   - To restrict the promotion to visitors from certain segments, select **Apply to selected segments** and select the segments to whom you want to offer the promotion.
2. (Optional) If you need to create a new segment for the promotion, complete the following steps:
   a. Open a new browser window by clicking the arrow icon in the upper right corner of the form.
   b. Create a new segment in the new window. For help with this step, see "Creating Segments," on page 216.
   c. Click the **Refresh** icon in the parent window (the window in which you are creating the promotion).
   d. Repeat the first step in this procedure to include this segment in the promotion.
3. Click **Continue.**

   The **Discount** section of the "New Promotion" form appears, as shown in the next step.

Step 4: Define the Discount

Note

To configure the discount to be based on the current state of a visitor's shopping cart, create a segment based on the shopping cart. Then, select that segment for the promotion. For information about creating segments based on the shopping cart, see "Step 4: Define the Segment with Shopping Cart Criteria," on page 228.

To define the discount use the following options:

- Option 1: Discounting the Entire Shopping Cart
- Option 2: Discounting Specific Products
- Option 3: Discounting the Shipping Costs

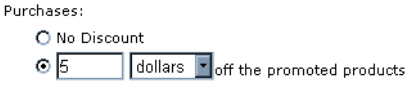
You can combine either of the first two options with the third option, but you cannot combine the first two options.

Option 1: Discounting the Entire Shopping Cart

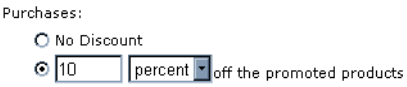
In the **Discount** section of the "New Promotion" form, do the following:

1. Select the second option under **Purchases** and then set the values that define the discount.

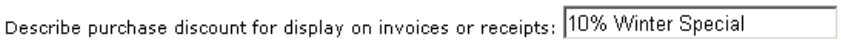
   For example, to offer $5.00 off, set the values as follows:

   To offer 10% off, set the values as follows:

2. Select **Every product in the catalog**.
3. Click in the **Describe purchase discount** text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated. For example:



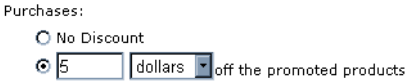
4. Either click **Continue** or go to Option 3: Discounting the Shipping Costs.

Option 2: Discounting Specific Products

In the **Discount** section of the "New Promotion" form, do the following:

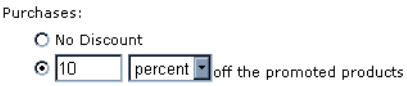
1. Select the second option under **Purchases** and then set the values that define the discount.

   For example, to offer $5.00 off, set the values as follows:



   To offer 10% off, set the values as follows:

2. Select the products that the discount applies to:



   a. Select **Specific item(s)**.
   b. Click **Browse**.

      Content Server displays a pop-up window that allows you to find and select the desired assets. The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

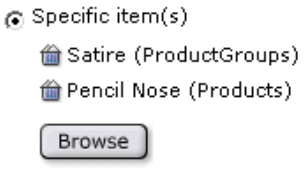
   c. In the drop-down list in the pop-up window, select the asset type of the asset(s) you want to add to the list. (In our example, select **Find Product**.)
   d. In the **Search For** field in the **Search** tab, enter criteria identifying the asset(s) and click **Search**.
   e. In the list of search results, select the check box next to each desired asset.

      Note

      You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

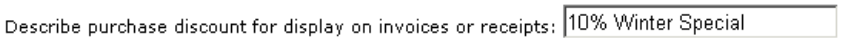
   f. Click **Select**.

The pop-up window automatically closes and Content Server lists the flex assets or flex parents you selected in the form. For example:



3. Click in the text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated.

   For example:



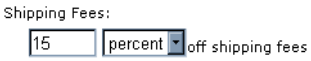
4. Either click **Continue** or go to the procedure Option 3: Discounting the Shipping Costs.

Option 3: Discounting the Shipping Costs

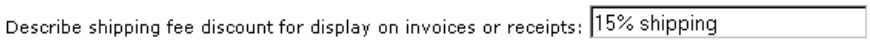
You can discount shipping in addition to, or instead of, discounting purchases. In the **Discount** section of the "New Promotion" form, do the following:

1. Under **Shipping Fees**, set the values that define the discount.

   For example, to offer 15% off shipping set the values as follows:



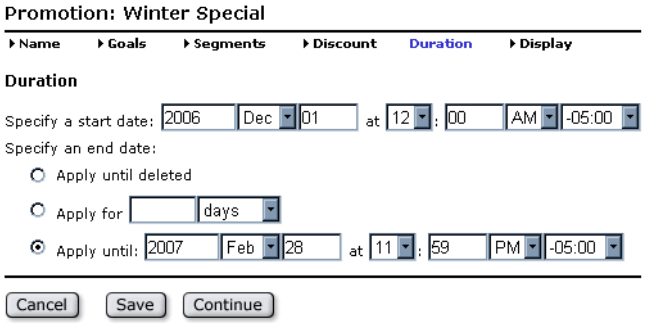
2. Click in the **Describe shipping fee discount** text box and enter a meaningful description of the discount. The text that you enter in this field is displayed on the invoice or receipt next to the items that it applies to. Use it to describe to your visitors how their bill is calculated. For example:



3. Click **Continue**.

   The **Duration** section of the "New Promotion" form appears, as shown in the next step.

Step 5: Define the Promotion's Duration



Note

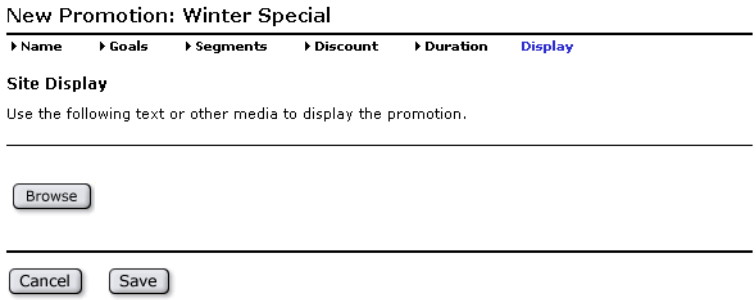
If you do not specify how long the promotion should run, the promotion runs until you delete it.

In the **Duration** section of the "New Promotion" form, do the following:

1. Under **Duration**, set a start date and start time.
2. Specify when the promotion will end. Do one of the following:
   - If you want the promotion to run until you delete it or change its duration, select **Apply until deleted**. Use this option if you are designing an ongoing promotion with an indefinite duration. When you want to cancel it, you can either delete it or you can edit it and apply an end duration date.
   - If you want the promotion to run for a certain period of time after the start time that you specified in step 1, click **Apply for**. Enter a whole number (not a fraction or decimal) in the text box and choose hours, days, weeks, months, or years from the drop-down field.
   - If you want the promotion to run until a specific date, select **Apply until** and enter the date and time that you want it to end. The current date and time are displayed by default.
3. Click **Continue.**

   The **Display** section of the "New Promotion" form appears, as shown in the next step.

Step 6: Advertise the Promotion on Your Site



In the **Display** section of the "New Promotion" form, do the following:

1. Select the asset(s) that you want to use to advertise this promotion. (Typically a promotional banner is stored as either an article or an image.)

   Note

   If you select multiple assets, when the promotion is displayed on your site pages, Engage displays the content that was rated the highest for the segments that the visitor belongs to. In other words, if you are using this promotion for more than one segment, you can use segment-specific ad banners for the promotion.

   a. Click **Browse**.

      Content Server displays a pop-up window that allows you to find and select the desired asset(s). The window contains the following tabs: **Search**, **Active List**, **History**, and **My Assignments**. The **Search** tab is displayed by default.

   b. In the drop-down list in the pop-up window, select the asset type of the asset(s) you want to add to the list. (In our example, select **Find Product**.)

   c. In the **Search For** field in the **Search** tab, enter criteria identifying the asset(s) and click **Search**.

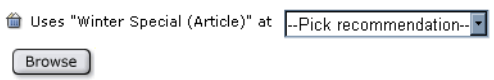
   d. In the list of search results, select the check box next to each desired asset.

      Note

      You can also select assets that are present in the **Active List**, **History**, and **My Assignments** tabs in the pop-up window. The contents of these tabs are the same as of the portlets to which they correspond.

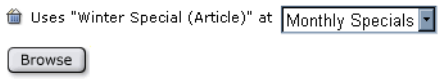
   e. Click **Select**.

      The pop-up window automatically closes and Content Server lists the selected assets in the form with a drop-down list box of recommendations next to each asset. For example:



2. In the **Pick recommendation** field next to the first item, select the name of the recommendation that you want to replace or override with this item.
(The recommendation provides the location for the banner you selected in step 1.)

   For example:



3. Repeat step 2 for each item that you selected in step 1.
4. Click **Save**.

Sample Promotion Asset

When you install Engage with the Burlington Financial sample site, you get a sample promotion asset, **High Risk Discount**. This promotion is designed to work in concert with the sample "Segment" and "Recommendation" assets that also appear in the Burlington Financial sample site. Use the sample promotion as a template for creating promotion assets for your site.

Publishing Promotions

After you create a promotion, it must be approved before it can be published to your delivery system. The promotion takes effect only after it is published. Be sure to examine or inspect your promotion to verify that you configured it correctly before you approve it for publishing.

For more information about approving assets, see Chapter 15, "Publishing."

Appendices

This part contains the following appendices:

- 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 sections:

Overview of the Flex Asset Model

As mentioned in Chapter 1, "Overview," Content Server developers use two asset data models to create asset types and define how asset data is stored in the Content Server database: the **basic** asset model and the **flex** asset model.

The flex asset model is more complex than the basic asset model. Unlike basic assets, where the information for one instance of an asset is stored in one row of a database table, the information for one instance of a flex asset is stored in multiple database tables.

Whereas basic asset types are standalone asset types, flex asset types are composed of families of asset types. The members of a flex family are:

- Flex attribute type (required)
- Flex asset type (required)
- Flex definition (required)
- Flex parent (required)
- Flex parent definition (required)
- Flex filter type (optional)

The members of a flex family form an asset inheritance tree, where child assets inherit various attributes from their parents.

As a content provider, you will not directly work with all of the members of the flex family. In fact, you will mainly be working with flex assets, which are the key members of flex families (all of the other members of a flex family contribute to the flex asset in some way). If you have the appropriate permissions, you may also be responsible for creating new flex attributes, which are characteristics of flex assets.

Flex Asset Functionality

In many of your daily activities as a content provider, the distinction between basic asset types and flex asset types is not relevant, because the majority of the functions you perform are the same whether you are working with flex or basic assets. However, in some of your activities, you may encounter functionality that is unique to flex assets.

Note

Your access to such functionality depends on your role and the permissions set by your CS administrator.

When Working with Engage

You can use Engage with both basic assets and flex assets. However, more Engage functionality is available when used with flex assets.

- Only flex assets and flex parents can be rated for segments. Basic assets cannot be rated for segments. See "Ratings," on page 234 for more information on rating assets.
- You can create a Related Items recommendation only with flex assets. See "Related Items," on page 241 and "Configuring Asset Relationships Using Related Items Recommendations," on page 265 for information on related items recommendations.

- When configuring sort order for a “Recommendation” asset, flex attributes only (not basic attributes) are available as a sorting option. See “Sort Criteria,” on page 238 for more information.

When Searching for Assets

- Searching for specific attributes is available only for flex assets. See Chapter 7, “Searching for Assets” for more information.

When Creating New Assets

- When creating a new flex asset, you may see a field (in the content entry form) that prompts you to select a parent or multiple parents for the new asset.
  - Depending on how your developers configured the asset type, this field could be required or optional.
  - You will either see **(S)** or **(M)** next to the parent selection field. **(S)** indicates that you can only select one parent; if this field is required, you must select one parent before saving the new asset. **(M)** indicates that you can select more than one parent; if this field is required, you must select at least one parent before saving the new asset.
  - Depending on the design implemented by your developers, you will either use select boxes or you will find and select parents using a pop-up window displayed by Content Server.

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