# SDL Tridion 2013 Content Manager Explorer User Manual

Content Management Technologies Division of SDL

# SDL Tridion 2013 Content Manager Explorer User Manual



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# About this user manual

This User Manual describes how to manage Web site content using the Content Manager Explorer.

## Audience

It provides instructions for Editors and Reviewers and Site Managers of content:

- **Editors** write content and can create pages (including images, pictures, or attachments). Editors can only publish to the Staging Presentation Server used for preview and inline editing purposes (not accessible for visitors of intranet/extranet Web sites).
- **Reviewers** edit content, put content and binary content together, and can create Pages. Reviewers can publish Pages to the Live Presentation Server (interacts with visitors), as well as to the Staging Presentation Server.
- **Site Managers** are primarily responsible for the overall management of their (local) publication and the coordination of the different editors and reviewers. Site managers are the first point of contact for all local editors & reviewers.

As a user, you are assumed to be familiar with your operating system and with using an internet browser.

# Chapter 1 Getting started

The Content Manager enables you to create, manage, and organize Web site content easily and efficiently. Getting started explains the fundamental concepts involved in using the Content Manager Explorer such as Publications, Web site building blocks, Publication rights and permissions, various other features and functionality and how to configure your browser.

You can create content using the **Content Manager Explorer**, a browser-based interface that you can use to access, create, edit, and publish content. Multiple authors, editors and designers can contribute, thereby allowing you to collaborate and align your content objectives. You can maintain Web content throughout its entire life cycle: from adding new content to publishing the content to your Web site. All versions of content are saved, thereby allowing you to view and track changes.

Note: You can also interact with the Content Manager through WebDAV, an industry standard interaction model that lets you browse through your Content Manager folders and work with items from any WebDAV-compliant interaction, such as Windows Explorer.

## 1.1 Basic Content Manager concepts

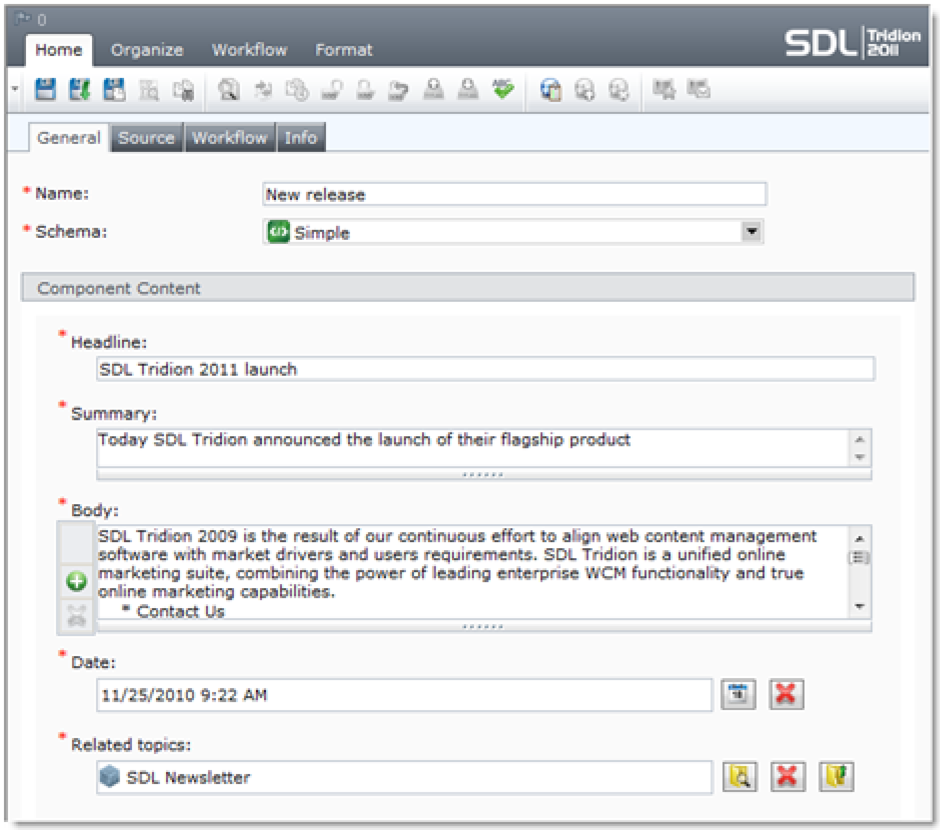
For content authors, the most important building blocks for creating (Web) content are Components and Pages and the most important concept is BluePrinting which manages content sharing and localizing between Web site Publications.

**Components**

Components define text or multimedia content:

- In the Content Manager Explorer, Components are displayed as forms with fields that you can fill in.
- In SiteEdit, Components are displayed within a Page.

Components are based on Schemas that define the kinds of fields you can specify.

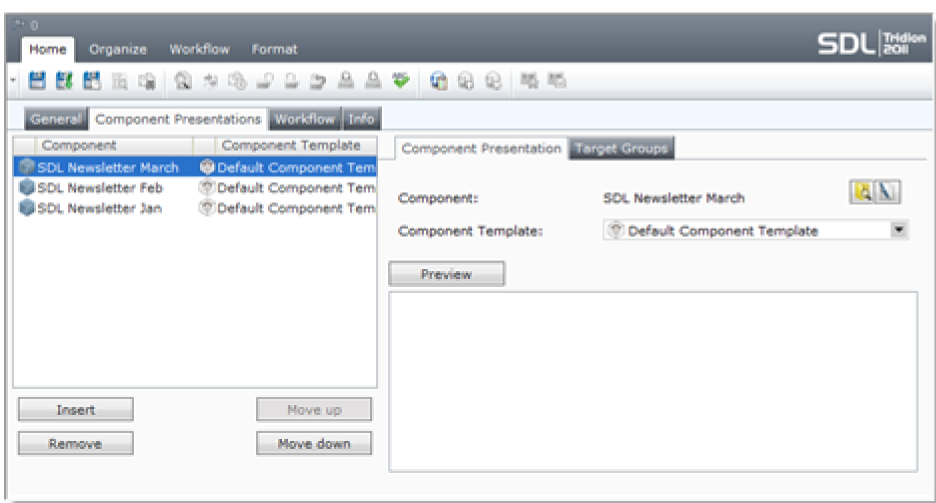



## Pages

Pages define Web content. When you have created Components, you need to add them to Pages and publish these Pages to a Web site.

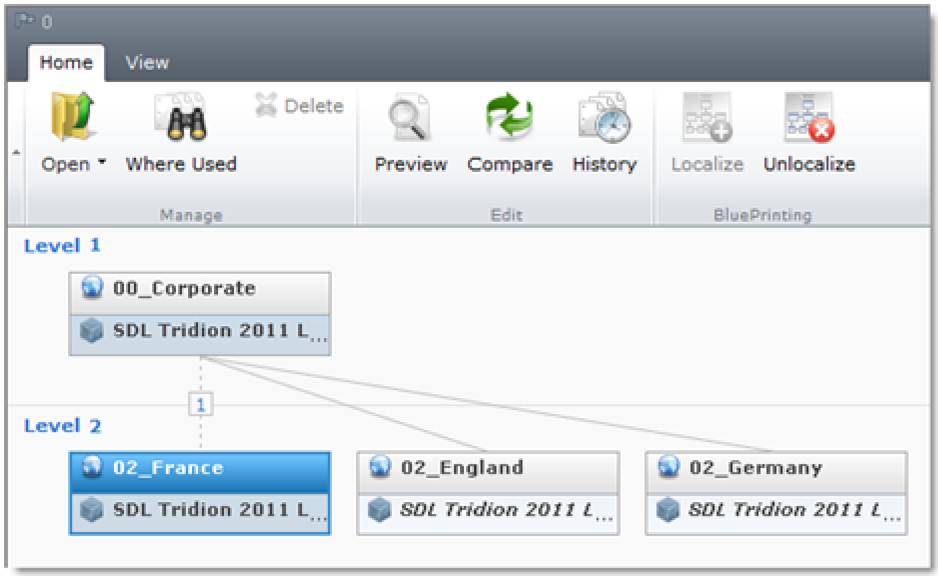
For each Component you add to a Page, you need to select a Component Template to define what the Component should look like on the published Web page. (The combination of a Component and Component Template on a Page is referred to as a *Component Presentation*.)

When you create a Page you also need to define what the Page should look like. You do this by selecting a Page Template that defines the overall layout of the Page and its look & feel.

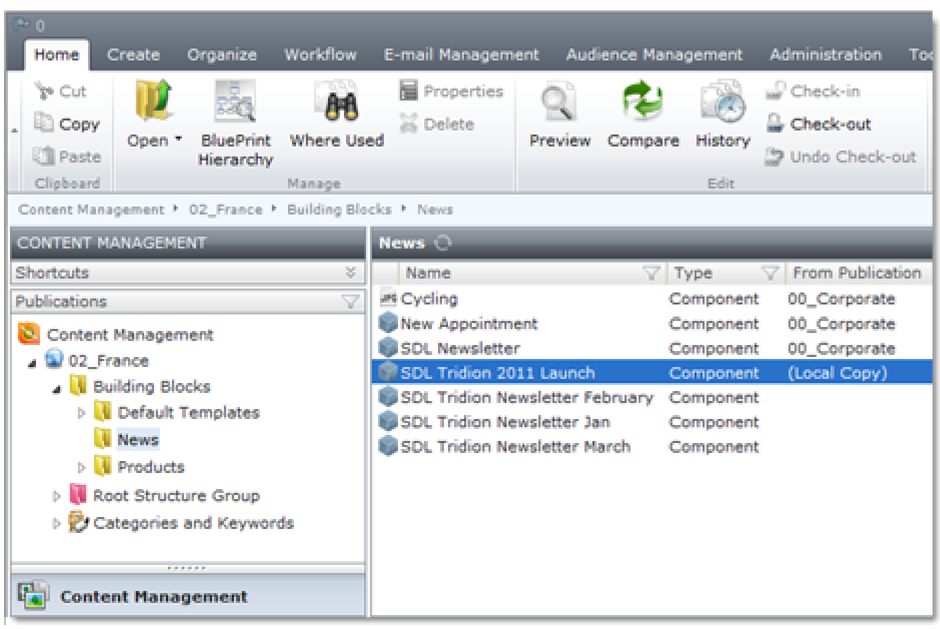


## BluePrinting

A BluePrint is a hierarchy of Publications in which Parent Publications share content with Child Publications. BluePrinting enables you to reuse structure, content, and design between Publications. The **BluePrint Viewer** provides a visualization of the Parent-Child relationships for an item within a BluePrint:




In this BluePrint, you can see the **SDL Tridion 2011 Launch** Component is shared from the **00_Corporate** Publication to its Child Publications. The following image shows the **02_France** Publication in the Content Manager Explorer. You can see that in this Publication **SDL Tridion 2011 Launch** is a (Local Copy) which means the shared item has been localized and is now editable:




Child Publications can contain a combination of:

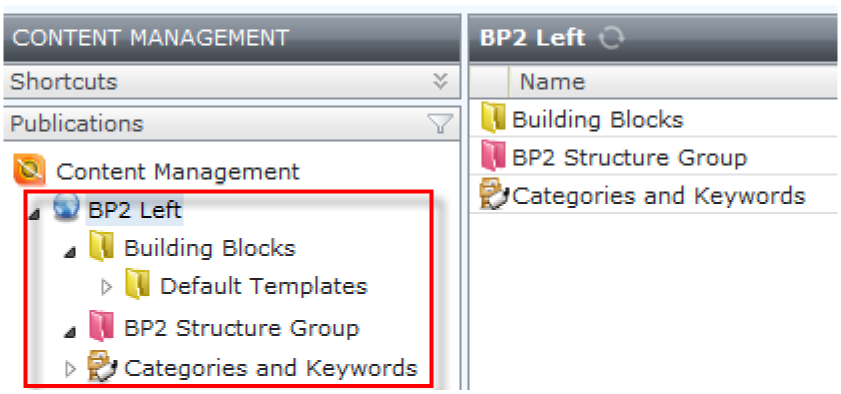
- **Shared items** from Parent Publications (read-only items)

- **Local copies** of shared items (editable copies of shared items created by localizing them)
- **Local items** (items created in the Child Publication)

## 1.2 Publications

In the Content Manager, all building blocks are saved in Publications. A Publication is a collection of content and layout items which are often combined to create a Web site or content for other channels.

A Publication organizes content using Folders and Structure Groups. Folders store content and design items, while Structure Groups store Pages. The following image shows a Publication:



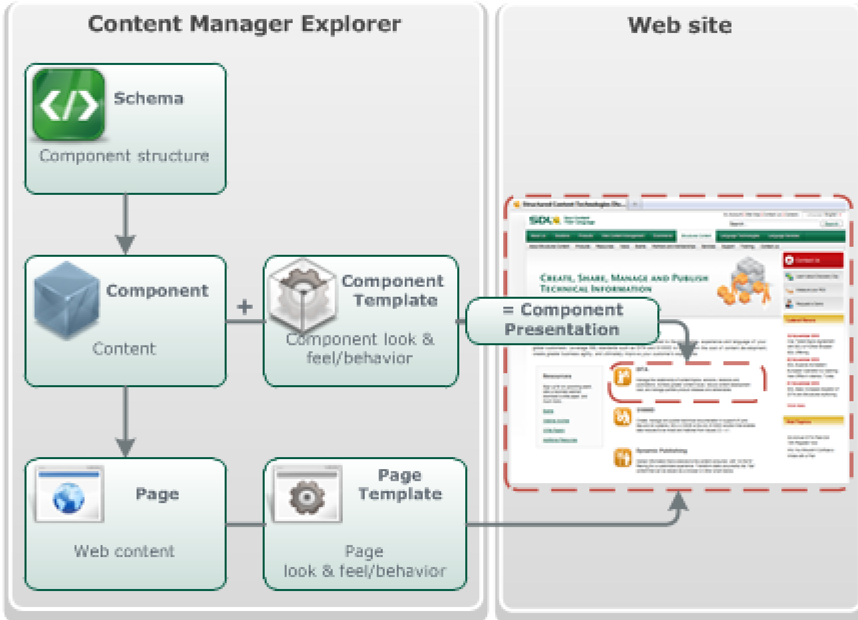

You use a Publication to:

- Create, organize, and manage content, layout, and Pages
- Manage user access using permissions and rights
- Create and initiate Workflow processes so that users create and edit items following a predefined set of activities
- Share and reuse content
- Create a site URL structure through Structure Groups

## 1.3 Web site building blocks

The main building blocks used to create Web sites are Schemas, Components, Component Templates, Pages, and Page Templates.

The following diagram shows the relationship between the main Web site building blocks:




The Content Manager allows you to create content and layout items separately and then to combine these items to create publishable Pages. As a result, teams in your organization can accomplish what they do best. For example, authors can create content, designers can design the look-and-feel of Pages, and editors can determine what content is published where. Depending upon your role in your organization, you may participate in creating or using any of these building blocks.

**Schemas**

Schemas define the structure of content and determine the type of content that authors can create. For example, a Schema called "Press Release" could define the following fields:

- Headline
- Date
- Summary
- Body

**Components**

Components based on this Schema share the structure defined by the Schema. Components are text or multimedia content based on Schemas. In the Content Manager Explorer, Components are often displayed as forms that content authors can fill in.

**Component Templates**

Component Templates display the contents of a Component using scripting and HTML formatting.

**Component Presentations**

Component Presentations combine a Component (content) with a Component Template (design). These Component Presentations are defined on a Page.

**Page Templates**

Page Templates determine which Component Presentations a Page displays and determines the overall layout of the Page. Also, a Page Template often determines the branding (the look-and-feel) of the Page.

**Pages**

Pages combine a Page Template and one or more Component Presentations.

Depending upon your role in your organization, you may participate in creating or using any of these building blocks.

# 1.4 Publication rights and permissions

A right determines the type of building block that a Content Manager user can work with. Permissions determine if you can view, create, delete, or localize the building blocks for which you have rights.

Your system administrator assigns you with specific rights for each Publication that you work in and Permission settings for each Folder or Structure Group in that Publication. For example, if you have Component Management rights and Read and Write permissions set on a Folder, you can create and edit Components but you cannot delete or localize them

# 1.5 Additional features and functionality

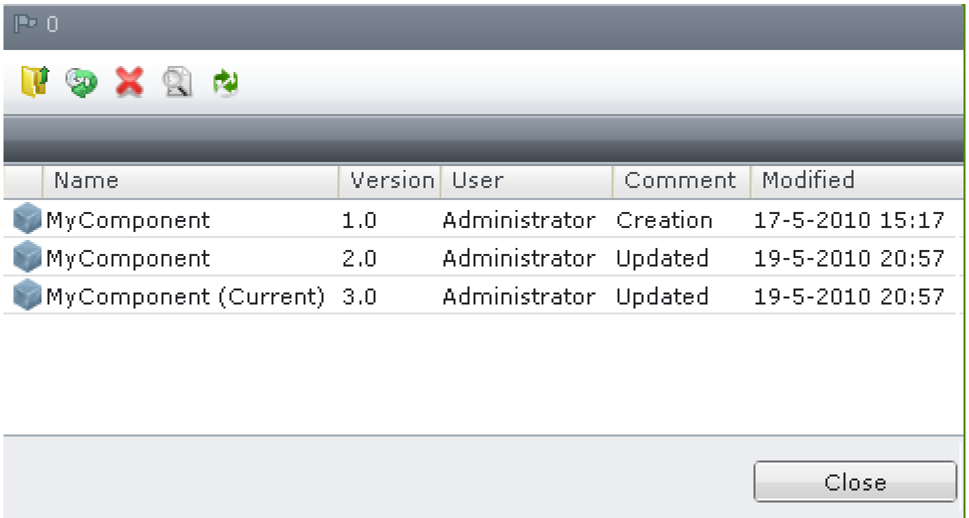
Additional features and functionality important to the management of content are: BluePrinting, Versioning, Check-in and check-out items, Search and Workflow.

## BluePrinting

A BluePrint is a relationship between Publications whereby Publications share structure, content, and design from and with other Publications. You can view the BluePrint for an item in the BluePrint Viewer (see page 58).

## Versioning

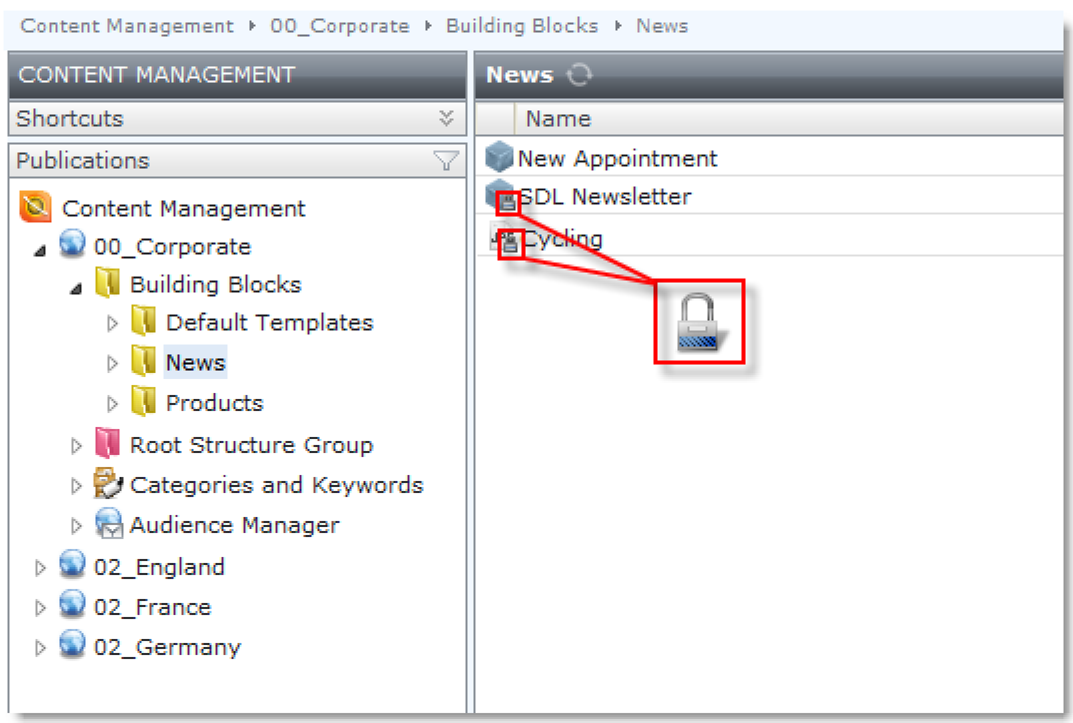
The Content Manager creates a new version or an item every time you save changes. As a result, you can track and compare versions of items using the Version History List, which lists all the versions of a selected item including the current version.




Note: For more information using versions of items, see Versioning (see page 164).

## Check-in and check-out items

You can check out an item that you are currently working on. This gives you exclusive use of the current version and essentially blocks editing to all other users. The Content Manager automatically checks out an item when you open it for edit. However, you can also explicitly check out and then check it in when you have completed work on the item.

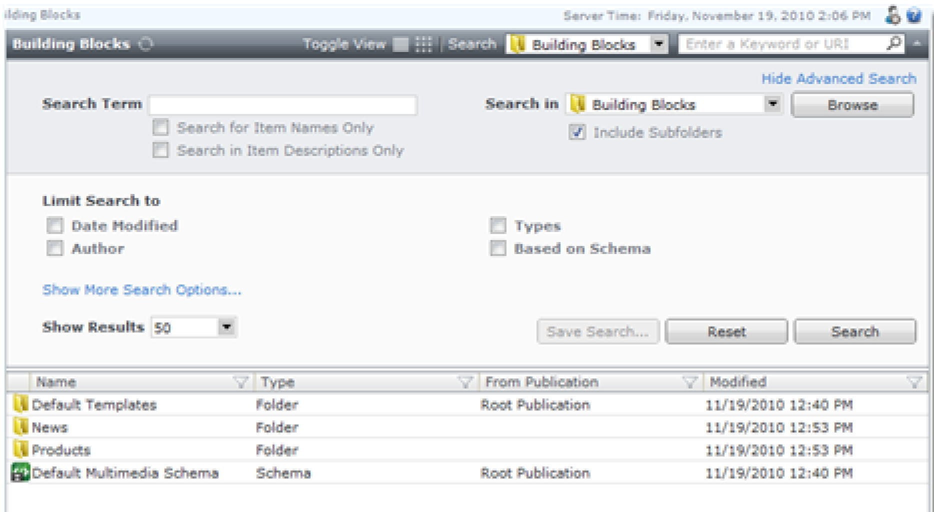



After you have completed work on the item, you can check the item back in for use by other users.

Note: For more information about checking-in and checking-out an item, see Check-in and check-out (see page 171).

## Search

Using the **Search View** you can search for specific items specifying search parameters on a general or advanced level:




Note: For more information about searching for items in the Content Manager, see Search (see page 182).

## Bundles

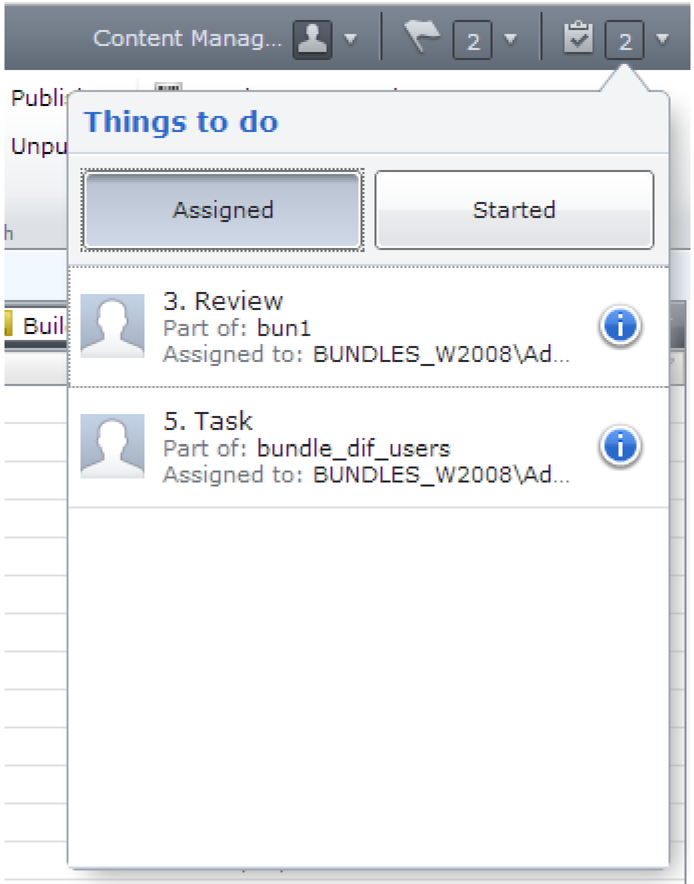
A Bundle is a dynamic container that can contain any number of content items, including other Bundles. The idea behind a Bundle is to collect items that are related in some way (for example, all items related to a specific marketing campaign) in a single container, so they can be used collectively.

Specifically, Bundles can be put in workflow by a user, which causes all of its items to go through workflow too.

## Workflow

You use Workflow to define a flow of activities that bring a task to completion. Activities are assigned to users and when a user completes an activity, the Content Manager automatically assigns the next activity until the task is complete. Workflow processes may be associated with Components, Pages, Templates and Bundles.

In the Content Manager Explorer, you can view activities that are assigned to you in the **Assigned** view in the **Things to do** panel:




## 1.6 Configuring your browser

The browser settings described in this section ensure that the **Content Manager Explorer**—the interface to the Content Manager—displays correctly on your screen.

The **Content Manager Explorer** runs in a browser, so you can access the interface by typing the address of the Content Manager in the address bar of your browser.

To access Content Manager Explorer easily, you can simply add the address of the Content Manager to your browser favorites. If you do not know the address of the Content Manager, please consult your system administrator.

You can access the Content Manager Explorer using the following browsers:

- Microsoft Internet Explorer 10.0 (on Windows 8 or Windows Server 2012)
- Microsoft Internet Explorer 9.0 (on other Windows versions)
- The latest version of Mozilla Firefox
- The latest version of Google Chrome
- Safari 6.0 for the Mac

# 1.7 Configuring your Web browser for Content Manager Explorer

This section explains how to configure your Web browser for use with Content Manager Explorer.

### Context

Note: Depending on rights configured, not all users of the client system may be able to perform these tasks.

### Steps to execute

1. To configure the browser, on your client machine, start Internet Explorer (even if you do not intend to use Internet Explorer as your browser).
2. In Internet Explorer, if you do not see the menu bar, press your left **Alt** key on the keyboard to display it.
3. Select **View** > **Encoding** > **Unicode** from the menu. This sets the browser encoding to Unicode.
4. Select **Tools** > **Internet Options** from the menu. The **Internet Options** dialog opens.
5. Access the **Security** tab, select the **Local intranet zone** and click **Sites**. The **Local intranet** dialog with generic site settings opens.
6. Select **Advanced** to open a **Local intranet** dialog listing sites associated with this zone.
7. Enter the URL of your Content Manager Explorer Web site and click **Add**. The site is added to the list. Click **Close** to close this dialog, and **OK** to close the generic sites dialog. The settings for the **Local intranet zone** reappear.
8. Click **Custom Level.** The **Security Settings - Local intranet Zone** dialog opens.
9. In the list of settings, find the following settings and set each to the value `Enabled`:
   - ActiveX:
     - **Run ActiveX controls and plug-ins**
     - **Script ActiveX controls marked safe for scripting**
   - Downloads:
     - **File downloads**
   - Miscellaneous:
     - **Submit non-encrypted form data**
   - Scripting:
     - **Active scripting**

- **Allow Programmatic clipboard access**

Click **OK** to apply these settings and close the dialog. The **Internet Options** dialog reappears, still showing the **Security** tab.

10. Select the **Privacy** tab and click **Advanced**. The **Advanced Privacy Settings** dialog opens.

11. Select **Override automatic cookie handling** and then select **Always allow session cookies**. Then click **OK** to close the **Advanced Privacy Settings** dialog. The **Internet Options** dialog reappears, still showing the **Privacy** tab.

12. Click **OK** to close the **Internet Options** dialog.

13. If you intend to use Mozilla Firefox as your browser, do the following:

    a. While logged in as an end user, launch Firefox and type `about:support` in the address bar.

    b. In the **Application Basics** area, check the **Profile Directory** property and click **Open Containing Folder** next to it.

    Windows Explorer (Windows) or Finder (Mac) opens, showing the Firefox profile folder.

    c. Close Firefox.

    d. In the folder, check for the presence of a file called `user.js`. If it exists, open it in a plain-text editor; if it does not exist, create it in a plain-text editor.

    e. Add the following lines anywhere in the `user.js` file:

```
user_pref("capability.policy.policynames", "allowclipboard");
user_pref("capability.policy.allowclipboard.sites", "http://<cmsname>");
user_pref("capability.policy.allowclipboard.Clipboard.cutcopy", "allAccess");
user_pref("capability.policy.allowclipboard.Clipboard.paste", "allAccess");
user_pref("browser.link.open_newwindow", 2);
```

    in which *<cmsname>* is the domain name of the Content Manager server machine.

    Note: You can also add comments on separate lines. Start these lines with a double forward slash (`//`).

    f. Save and close the `user.js` file.

    g. If you are using Firefox on Mac OS X, also do the following:

    - In the Apple menu, select **System Preferences**, then **Keyboard and Mouse**, then **Keyboard Shortcuts**
    - Under **Full Keyboard Access**, select **All controls**.

    Mozilla Firefox is now properly configured.

14. If you intend to use Google Chrome as your browser, SDL Tridion recommends to disable the auto-update functionality of Chrome.

By default, Google Chrome is configured to auto-update to its latest version. Because this user interface cannot be guaranteed to work with a newer version of Google Chrome,disabling auto-updating is recommended. To disable auto-updating in Google Chrome, refer to this Web page: http://www.chromium.org/administrators/turning-off-auto-updates.

15. If you want to have additional information available about the current state of its window, enable the browser Status Bar (visible at the bottom of the screen):
    - In Mozilla Firefox, select **View** > **Status Bar**
    - In Microsoft Internet Explorer, select **View** > **Toolbars** > **Status Bar**
    - In Google Chrome, this feature is not available
16. For all browsers you intend to use, disable popup-blocking functionality.

## 1.8 Recommended system display properties

To optimize how your browser displays the Content Manager Explorer, set your screen resolution to at least `1024x768` and your font size to small or `96 dpi`.

### Steps to execute

1. On a PC, on your desktop, right click and select **Properties**. The **Display Properties** window appears.
2. On the **Settings** tab, set your screen resolution to `1024x768` or higher.
3. Click the **Advanced** button. A window appears in which you can change the font size.
4. On the **General** tab, set your font size to small or `96 dpi`.
5. Click **OK** to return to the **Display Properties** window.
6. Click **OK** to save changes.
7. Alternatively, on a Mac, select **System Preferences** and in the dialog that opens, select **Displays** in the hardware area.
8. Under **Resolutions**, select a resolution of 1024x768 or higher.
9. Close the dialog.

## 1.9 Content Manager Explorer troubleshooting reference

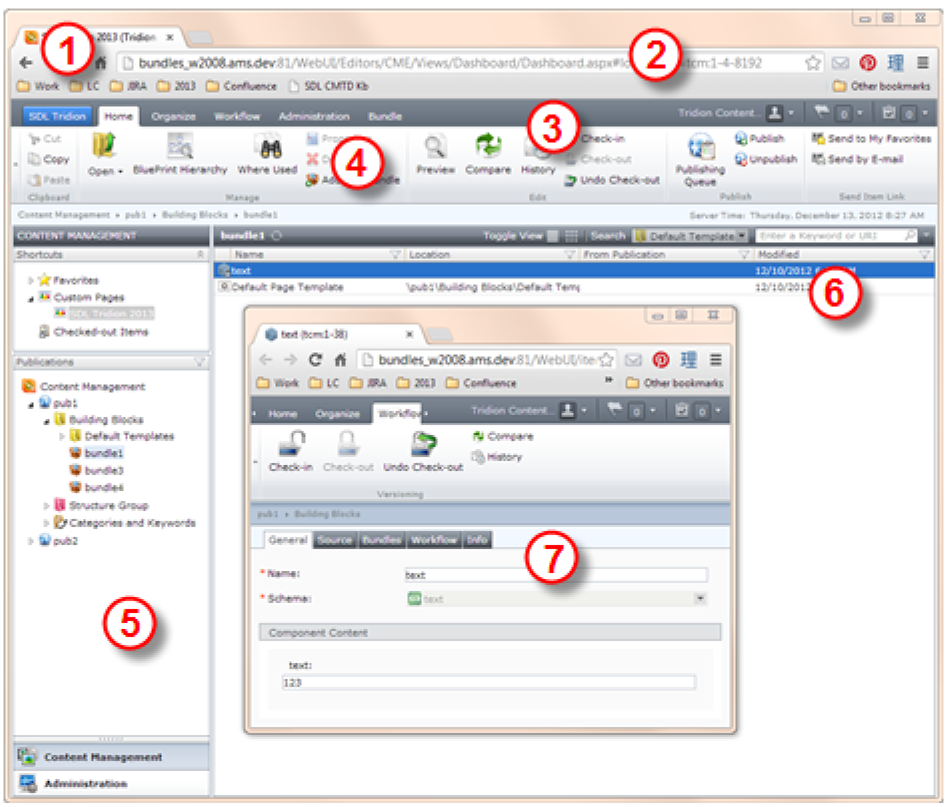
This troubleshooting section describes how to fix the most common problems with the Content Manager Explorer.

| Problem | Diagnosis | Action |
|---|---|---|
| Accessing the GUI pops up an error with 'Object required' in the **Details** area. | Your browser is using a pop-up blocker such as the one included in the Google Toolbar. | Disable pop-up blocker(s) for the Content Manager Explorer Web site. |
| One of the following happens:<br>• Right-clicking pops up an error with 'Object does not support this property or method' in the **Details** area.<br>• Trying to open a dropdown list results in a series of JavaScript errors. | Your browser settings are incorrect. | Configure your browser as instructed. |

# Chapter 2 Content Manager Explorer

The Content Manager Explorer is the interface to the Content Manager. This section describes the main navigation areas within the Content Manager Explorer.

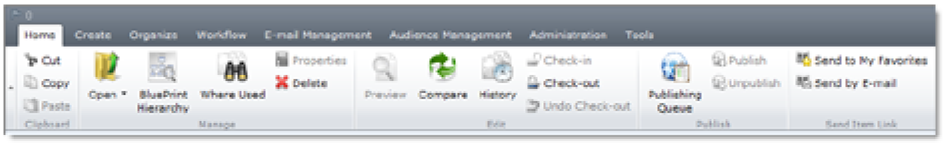
1. Browser (see page 10)
2. Address bar
3. Content Manager Explorer window
4. Ribbon (see page 16)
5. Navigation pane (see page 37)
6. List view (see page 38)
7. Edit window (see page 46)



## 2.1 Content Manager Explorer Ribbon

The Content Manager Explorer displays buttons and controls in a *Ribbon*. The Ribbon is a tabbed toolbar that contains ribbon contains controls for all the operations you can perform.

More frequently used operations have bigger buttons. The main screen has a Ribbon, and individual dialogs can also have a Ribbon.

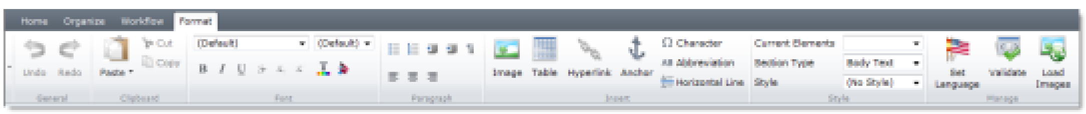



The Ribbon may not display all available controls, or may disable certain controls. What the Ribbon looks like for you exactly depends on the following:

- Your security settings
- The currently selected item
- The currently displayed item

Note also that the same control may appear in multiple tabs of the Ribbon.

When you create a new item or edit an item, the window in which you work also displays a Ribbon, with its own tabs and controls. Here is an example of a Ribbon specific to a dialog:




To save screen space, you can collapse the ribbon to a simple, icons-only toolbar by clicking the collapse/expand button on the left hand side:

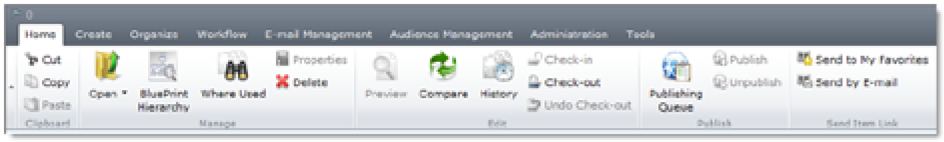

Click the collapse/expand button again to return the toolbar to its Ribbon appearance.

### 2.1.1 Ribbon tabs

The tabs in the toolbar Ribbon contain controls grouped into functional areas.

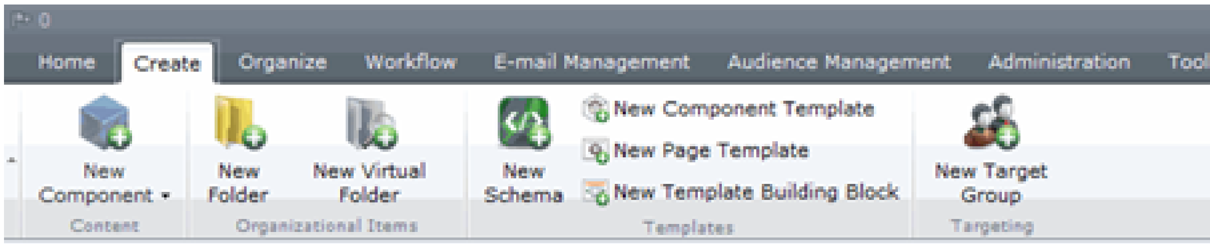
**Home**

The **Home** tab displays controls for editing, managing and publishing items.

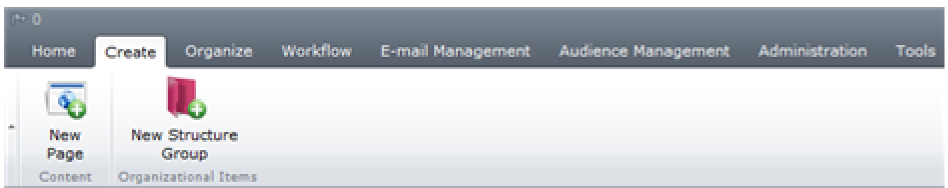



## Create

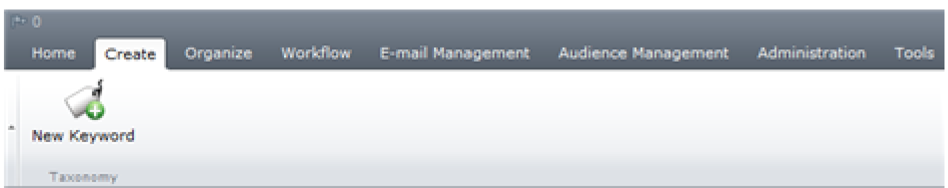
The **Create** tab displays controls for creating new Content Manager items. The following controls are active on a Folder:




The following controls are active on a Structure Groups:

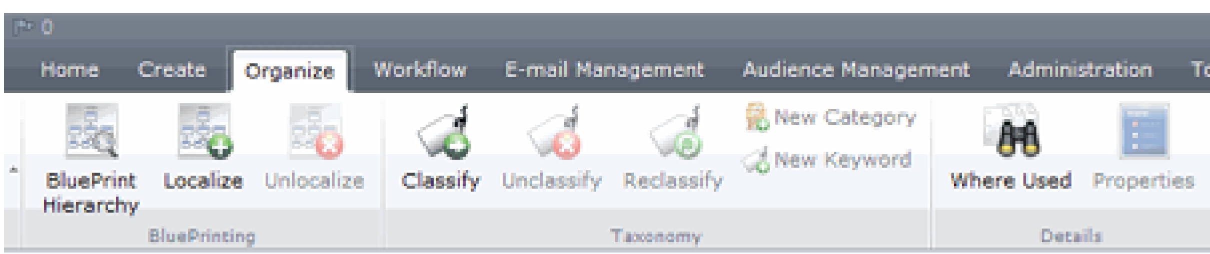



The following controls are active on a Category:



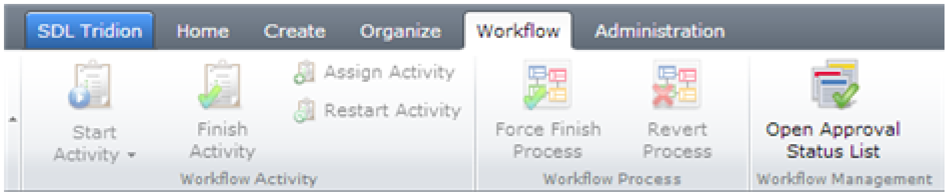

## Organize

The **Organize** tab displays controls for managing BluePrinting and taxonomies, and controls for viewing details about items.



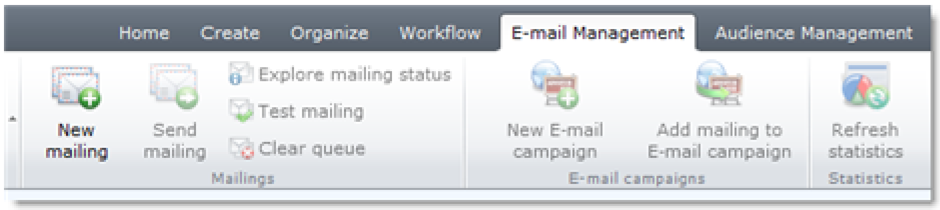

## Workflow

The **Workflow** tab displays controls to perform actions on Workflow activities and Workflow processes. The controls are active for Components, Pages, Component Templates and Page Templates that are in Workflow.



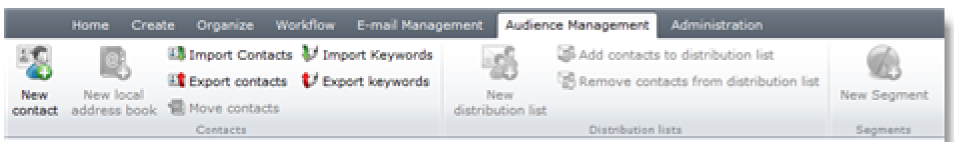

### E-Mail Management

The **E-mail Management** tab displays controls to manage Mailings and Mailing Campaigns and view Mailing Statistics. The controls are active in the **Outbound E-mail** node in a Publication.



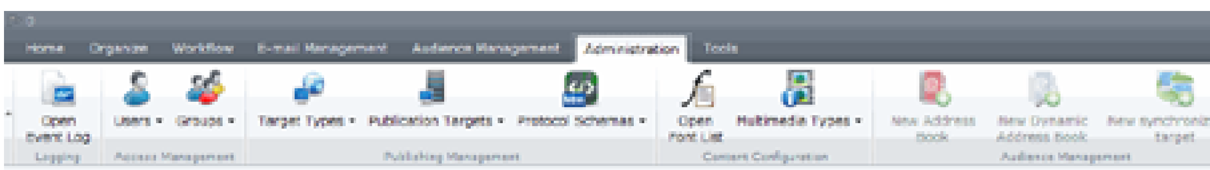

### Audience Management

The **Audience Management** tab displays controls for managing Contacts. The controls are active in the **Audience Manager** node in a Publication.



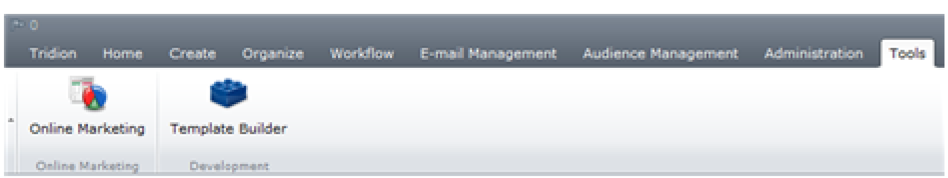

### Administration

The **Administration** tab displays controls for System Administrators.



### Tools

The **Tools** tab displays quick links to add ons.

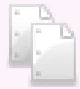
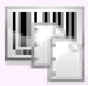
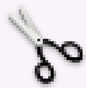
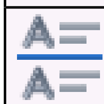
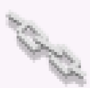
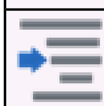
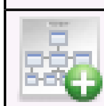


## 2.1.2 Ribbon controls

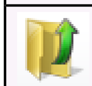
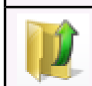
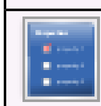
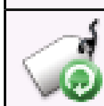
The following controls appear in either the main screen Ribbon, in a Ribbons of one or more dialogs, or in both.

Note: Depending on your security profile, not all of these controls may be available in your user interface.

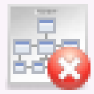
| Icon | Label | Description |
|---|---|---|
| | Abbreviation | Insert a piece of text and its abbreviation at the current cursor location, or provide an abbreviation for the selected text. |
| | Add item to my favorites | Add a bookmark pointing to the currently selected item in the list, or the current item open in this dialog. |
| | Anchor | Insert, edit or remove an anchor at the current cursor position. For more information, refer to Format area fields (see page 77) |
| | Blueprint Hierarchy | Show the Blueprint hierarchy of which the current Publication is a part, and the status of the currently selected item in it (shared, localized or local item). |
| | (Bold) | Make text bold. |
| | (Bullet list) | Make a bullet list. |
| | (Center) | Center text. |
| | Character | Insert a special character at the current cursor position. |
| | Check in | Check in your changes to create a new version of the current item. |
| | Check out | Check out the current item for editing. |
| | Check spelling | Check the spelling of text in the current dialog. |
| | Classify | Add a Keyword association to one or more Content Manager item(s). |

| Icon | Label | Description |
|---|---|---|
|  | Compare | Compare two versions of an item. |
|  | Copy | Copy the currently selected item(s) or content to the clipboard, without removing. |
|  | Copy item link to clipboard | Put a link to the currently selected item in the list, or the item currently open in this dialog, in your clipboard so that you can paste it in another application or document. |
| (none) | Current elements | Select an HTML element that encloses the current cursor position. This control is especially useful to select tables. |
|  | Cut | Move the currently selected item(s) or content to the clipboard, removing the item(s) or content from its current position. |
|  | Delete | Delete the currently selected item in the content area. |
|  | Finish Activity | Release the current item, which you had previously started activity on, so that it enters the next workflow state. |
|  | History | Show all previous versions of the current item in a list. |
|  | Horizontal line | Insert a horizontal line at the current cursor position. |
|  | Hyperlink | Insert or edit a link to a Component or to an external resource. For more information, refer to Inserting hyperlinks in a format area (see page 83). |
|  | Image | Open a dialog to insert an image at the current cursor position. For more information, see Inserting an image in a format area (see page 86). |
|  | (Indent) | Indent text. |
|  | (Italic) | Make text italic. |
|  | (Left-align) | Left-align text. |
|  | Load images | Display images in a Format Area (they are not loaded by default, in order to optimize performance). |
|  | Localize | Create a local copy of a shared BluePrint item. |

| Icon | Label | Description |
|---|---|---|
| | New Category | Create a new Category. For more information, refer to the implementer's documentation portal. |
| | New Component | Create a new Component. |
| | New Component Template | Create a new Component Template. For more information, refer to the implementer's documentation portal. |
| | New Custom Page | Create a new Custom Page. For more information, refer to the implementer's documentation portal. |
| | New Folder | Create a new Folder. |
| | New Group | Create a new Group of users. For more information, refer to the implementer's documentation portal. |
| | New Keyword | Create a new Keyword. For more information, refer to the implementer's documentation portal. |
| | New Multimedia Component | Create a new Multimedia Component. |
| | New Multimedia Type | Add a new Multimedia Type. For more information, refer to the implementer's documentation portal. |
| | New Page | Create a new Page. |
| | New Page Template | Create a new Page Template.[1] |
| | New Publication | Create a new Publication.[1] |
| | New Publication Target | Create a new Publication Target.[1] |
| | New Schema | Create a new Schema. [1] |
| | New Structure Group | Create a new Structure Groups. |
| | New Target Group | Create a new Target Group. |

| Icon | Label | Description |
|---|---|---|
|  | New Target Type | Create a new Target Type. |
|  | New Template Building Block | Create a new Template Building Block.[1] |
|  | New User | Create a new User. [1] |
|  | New Virtual Folder | Create a new Virtual Folder. For more information, refer to Search Folders (see page 189) |
|  | (Numbered list) | Create a numbered list. |
|  | Open | Open the currently selected item in the content area. If the item is a Multimedia Component, this will show the item's properties rather than its binary content. |
|  | Open approval status list | Show the various approval statuses.[1] |
|  | Open with WebDAV | Open the currently selected item as a WebDAV item. If the item is a Multimedia Component, this will open the binary item in the software application associated with it. (Note that any changes you make in the external application will not be reflected in SDL Tridion.) If the item is not a Multimedia Component, the XML of the item is displayed. |
|  | Paste | Paste the contents of the clipboard in the current list or at the current cursor position. |
|  | Preview | Preview the currently selected item. |
|  | Properties | Show the properties of the current item. |
|  | Publishing queue | See the status of items that were submitted for publishing. |
|  | Publish | Submit the current item to be published to one or more destinations. |
|  | Reclassify | Replace a Keyword association in one or more Content Manager items(s). |
|  | Redo | Redo the last undone edit action. |

| Icon | Label | Description |
|---|---|---|
| | (Right-align) | Right-align text. |
| | Save | Save the current item without closing the dialog. |
| | Save and close | Save the current item and then close the dialog. |
| | Save and new | Save the current item, close the dialog and open a new, empty dialog to create a new item of the same type. |
| (none) | Section type | Insert a header, paragraph marker or HTML `<div>` element. |
| | Send item link by e-mail | Open an e-mail using your default e-mail client containing a link to the currently selected item in the list, or the item currently open in this dialog. |
| | Set language | Mark selected text as being in a specific language. |
| | Start Activity | Place an exclusive lock on the current item, which has been assigned to your user Group through workflow. For more information, refer to . |
| | Start Activity and Open | Start Activity on the current item (see above) and open it in a dialog for editing. |
| | Table | Open a dialog to insert a new table at the current cursor position, or to format the currently selected table. For more information, refer to Formatting tables in a Format Area (see page 87). |
| | Translate | Submit the current item to be translated. |
| | Unclassify | Remove a Keyword association from one or more Content Manager item(s). |
| | (Underline) | Underline text. |
| | Undo | Undo the last edit action |
| | Undo check-out | Undo a previous check-out of the current item. |
| | (Unindent) | Unindent text. |

| Icon | Label | Description |
|---|---|---|
|  | Unlocalize | Permanently delete a previously created local copy of a shared BluePrint item. |
|  | Unpublish | Remove a previously published item from one or more of the destinations to which it was published. |
|  | Validate | Validate the HTML in the current Format Area field. |
|  | Where Used | Show which dependencies this item has in relation to other items: which items use it, which items it uses, and so on. |

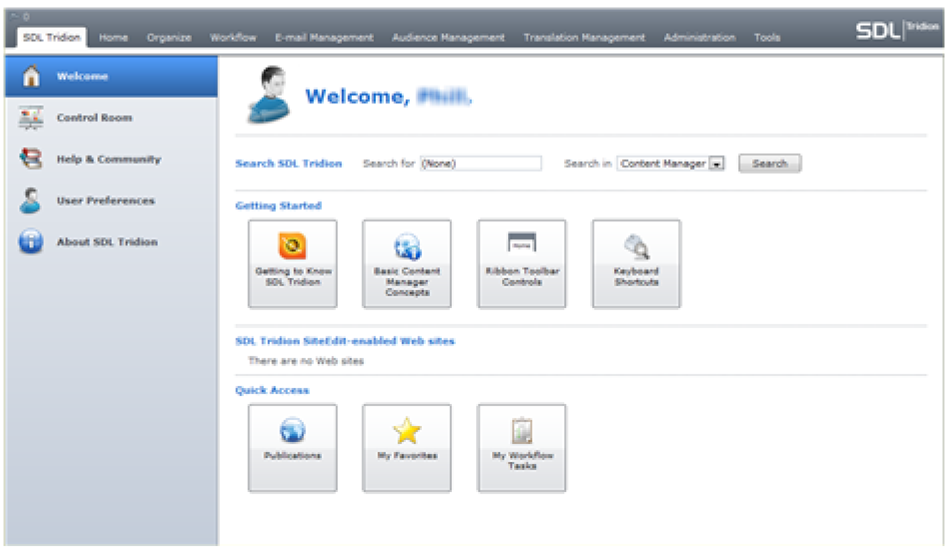
Note: [1] for more information, refer to the implementer's documentation portal.

## 2.2 Dashboard

When you log on to Content Manager Explorer, you see the SDL Tridion Dashboard. The Dashboard gives you quick access to important functionality and support options.

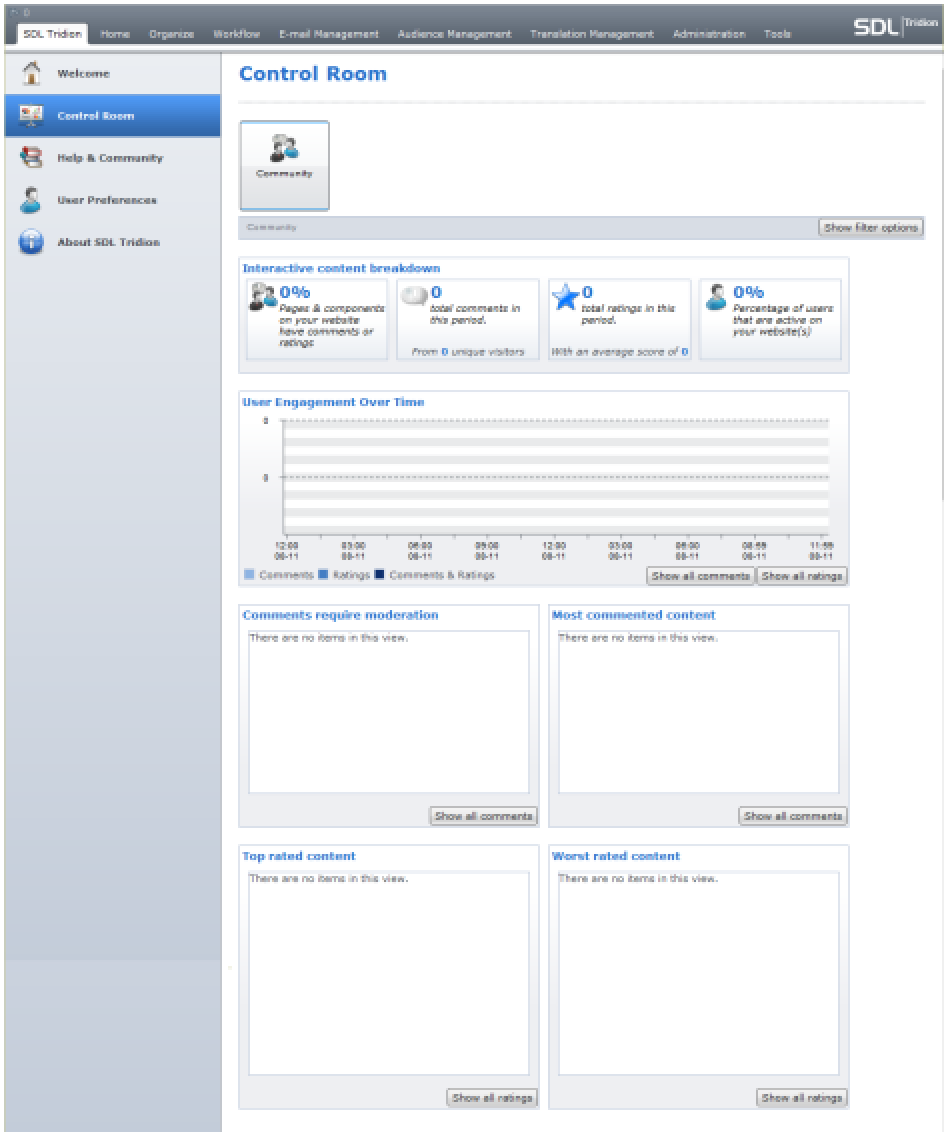
The Dashboard contains the following views:

**Welcome**



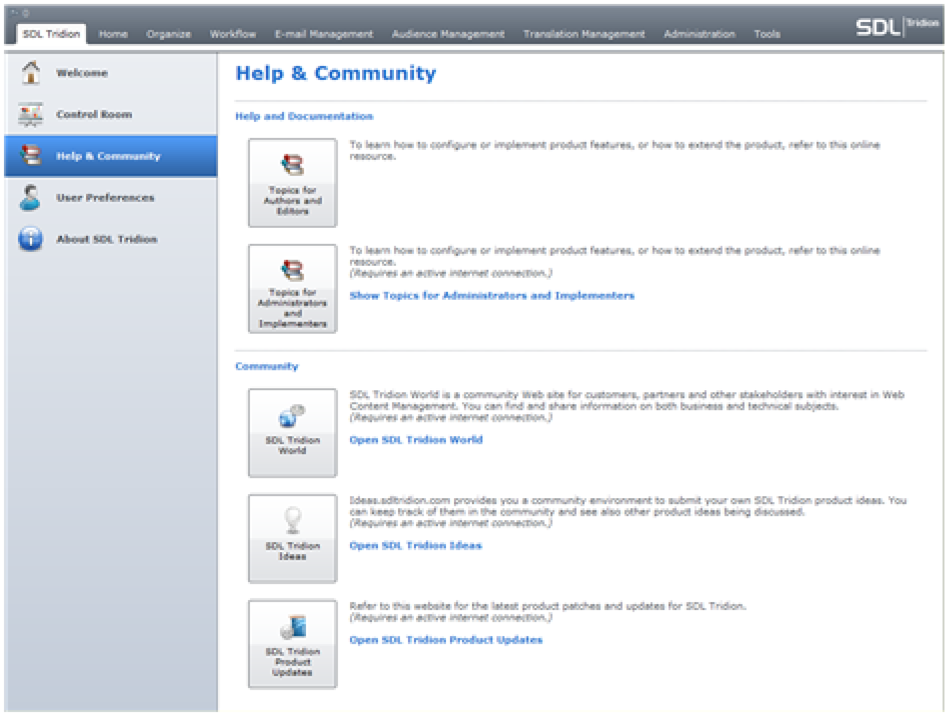

Contains a quick search interface, links to helpful topics to get you started, links to SiteEdit Web sites (if any), and quick access to the most used functionality.

**Control Room**



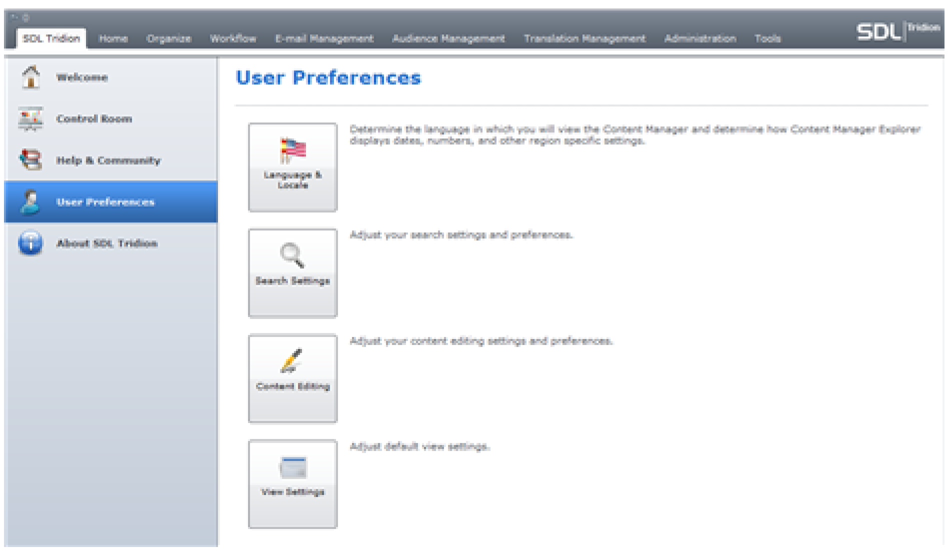

This screen lets you configure specific features of SDL Tridion, or inspect metrics and statistics.

## Help & Community



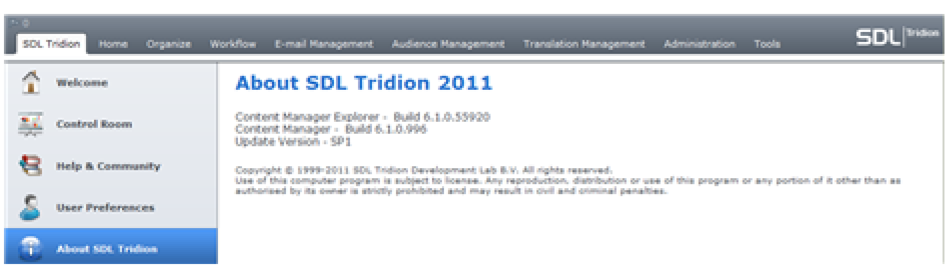

Links to extensive help documentation and support communities for all types of users.

### User Preferences




Lets you configure your personal options.

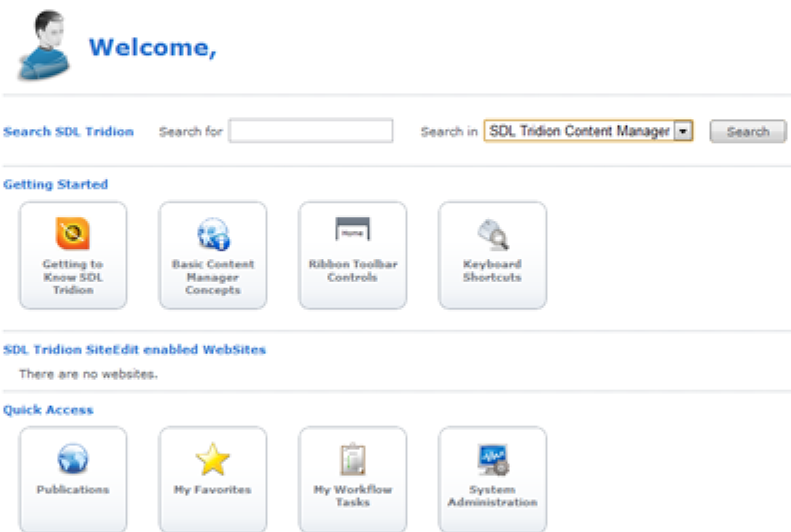
### About SDL Tridion



A screen that tells you which version of SDL Tridion you are using.

### 2.2.1 Dashboard - Welcome screen

The **Welcome** screen in the Dashboard contains a quick search interface, links to helpful topics to get you started, links to SiteEdit Web sites (if any), and quick access to the most used functionality.




**Search SDL Tridion**

To search the texts of items in the Content Manager, enter your search term under **Search for** and click **Search**. Alternatively, to search user documentation, enter your search term under **Search for**, select **SDL Tridion Documentation** in **Search in**, and click **Search**.

**Getting Started**

These buttons take you to a number of documentation topics that explain basic concepts for the new user:

- **Getting to Know SDL Tridion** gives you the basics of the user interface and how to use it;
- **Basic Content Manager Concepts** introduces you to fundamental concepts such as Components and Pages;
- **Ribbon Toolbar Controls** provides a reference of controls found in the Ribbon;
- **Keyboard shortcuts** shows the handy keystrokes that can speed up your editing.

**SDL Tridion SiteEdit-enabled Web sites**

Points to a list of Web sites (if available) that have SiteEdit enabled. SiteEdit is an add-on SDL product that lets you edit and manage content directly on the published Web page.

**Quick Access**

These buttons jump to often-used functionality in the user interface:

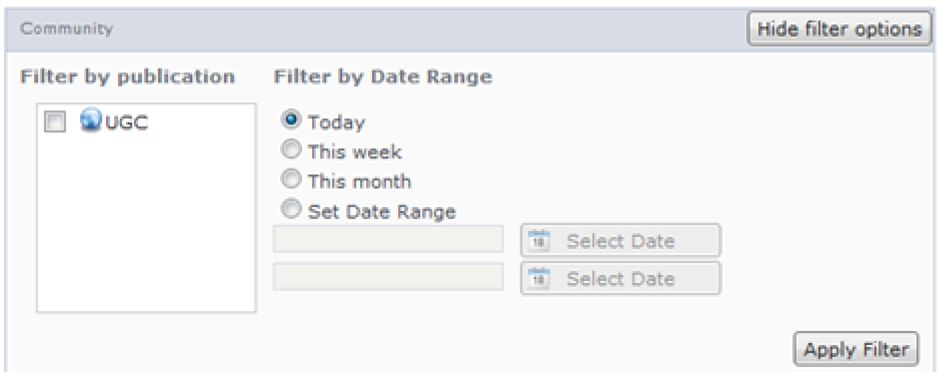
- **Publications** takes you to a list of Publications (which correspond to Web sites) that you have access to;

- **My Favorites** shows the list of item you have bookmarked as favorites;
- **My Workflow Tasks** shows you content items assigned to you that you have started work on;
- **System Administration** takes you to administration tasks for the SDL Tridion system (this option may not always be available).

### 2.2.2 Dashboard - Control Room screen

In the SDL Tridion 2011 SP1 release, the Control Room screen displays information about User Generated Content (UGC) and for Online Marketing Explorer. For more information about the latter, refer to the *Online Marketing Explorer User Manual*.

If you select to see information for UGC, you can filter the results displayed in the Control Room screen by clicking **Show filter options** on the right. This lets you apply the following filters:




**Filter by Publication**

Select the Publication or Publications for which you want to see results. By default, results for all Publications is displayed.

**Filter by Date Range**

Select **Today**, **This Week** or **This Month** to show results only for those periods. Select **Set Date Range** and use the two **Select Date** buttons to select the start and end times of your date range to specify the period for which you want to see results.

The results displayed are:

**Interactive content breakdown**

This area shows:

- the percentage of commented or rated Pages or Components
- the total number of comments submitted in the period you specified, and the number of unique visitors who left them
- the total number of ratings submitted in the period you specified, and their average score
- the percentage of users that are active on your Web site

**User Engagement over Time**

Shows trends in commenting, rating and both for the period you specified.

**Comments awaiting moderation**

A list of comments in need of moderation.

**Content with the most comments**

The top 10 Pages and Components, ranked by the number of comments they received (most comments at the top).

**Highest rated content**

The first 10 Pages and Components, ranked by the ratings they received (highest rating at the top).

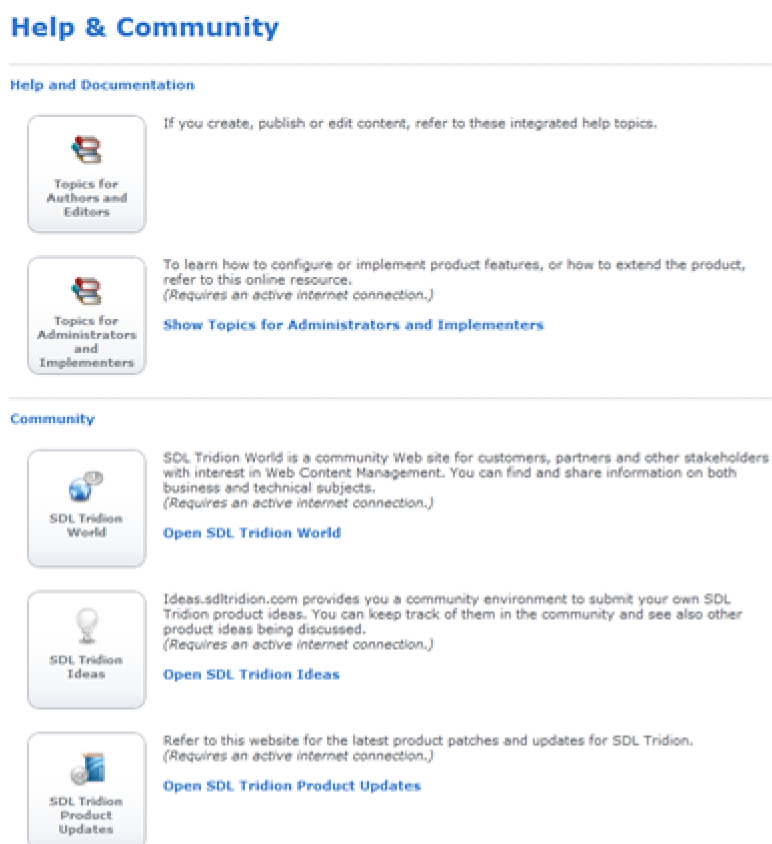
**Lowest rated content**

The first 10 Pages and Components, ranked by the ratings they received (lowest rating at the top).

You can use the **Show All Comments** and **Show All Ratings** buttons to see all comments or ratings submitted.

## 2.2.3 Dashboard - Help & Community screen

The **Help & Community** screen in the Dashboard has controls for accessing help and documentation and variety to contact other users of the product.




**Help and Documentation**

Two sets of documentation to help you use the product:

- **Topics for Authors and Editors** opens the help topics that are integrated in the user interface. These topics are intended for users who create and edit content.

- **Topics for Administrators and Implementers** opens the help topics in the documentation portal. These topics are intended for people who want to install, implement and extend product functionality. These topics are hosted on an online Web site, so you need an active internet connection. You also need a username and password to log on to the site. SDL Customer Support can supply you with these credentials.

**Community**

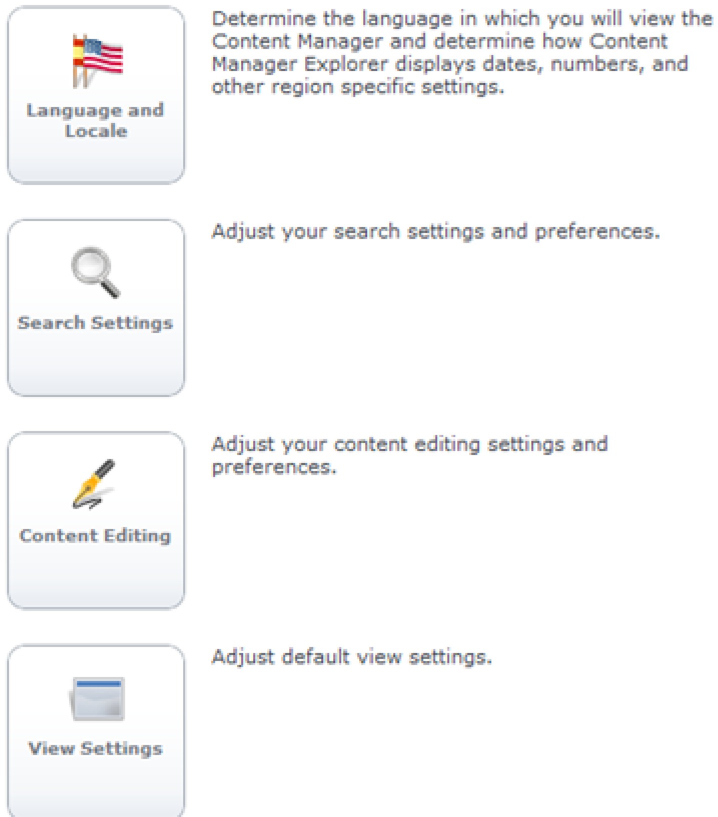
A variety of ways to contact other users of the product, as well as the people who create SDL Tridion:

- **SDL Tridion World** is the primary community Web site for implementers of SDL Tridion and its add-on products. This is an online Web site, so you need an active internet connection. You also need a username and password to log on to the site. SDL Customer Support can supply you with these credentials.
- **SDL Tridion Ideas** lets you submit ideas to improve or expand our product, and vote on other people's ideas.
- **SDL Tridion Product Updates** gives you access to the latest patches to your current release.

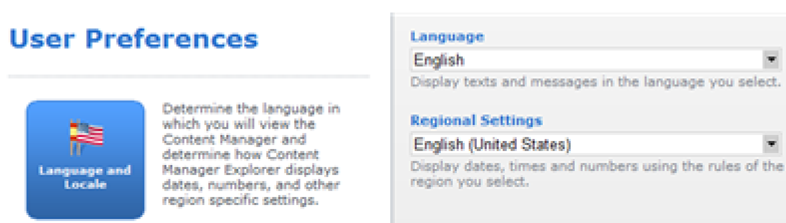
### 2.2.4 Dashboard - User Preferences screen

The **User Preferences** screen in the Dashboard has controls for setting language and locale, search, content editing and view settings.

# User Preferences

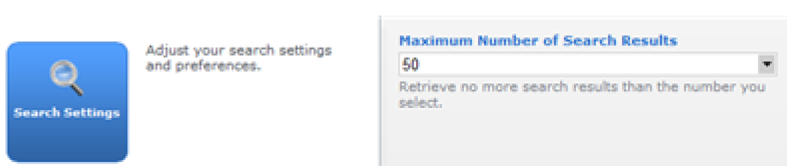



## Language and locale



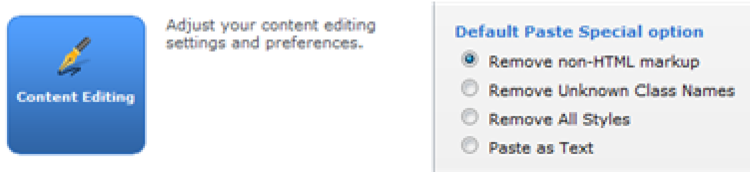

Lets you choose a different interface language and/or choose a date and number format.

## Search Settings



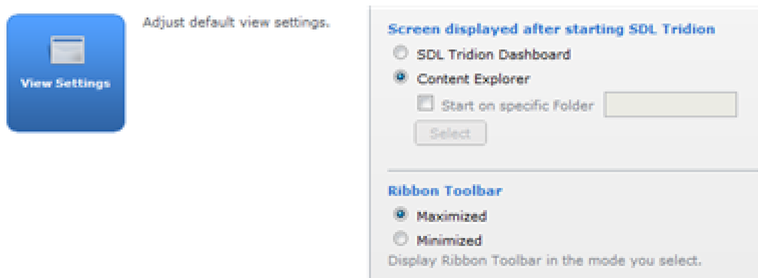

Lets you configure how Content Manager Explorer executes searches.

## Content Editing




Lets you configure how you want Content Manager Explorer to behave when you paste formatted text.

**View Settings**

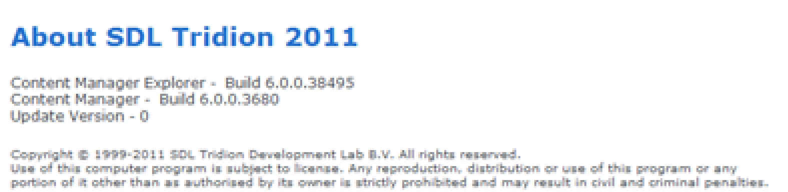



Lets you configure what you want to see after you log in: this Dashboard (select **SDL Tridion Dashboard**) or the **Home** tab of the Ribbon (select **Content Explorer**). In the latter case, you can also select a Folder you want Content Manager Explorer to start in.

Also lets you configure if you want the Ribbon toolbar to be maximized or minimized when you log in. You can always maximize or minimize the toolbar later, as explained in Content Manager Explorer Ribbon (see page 16).

## 2.2.5 Dashboard - About SDL Tridion screen

The **About SDL Tridion** screen shows you the version of SDL Tridion you are using, as well as a legal notice. Use the version numbers listed on this page when you submit a problem or question to SDL Customer Support.

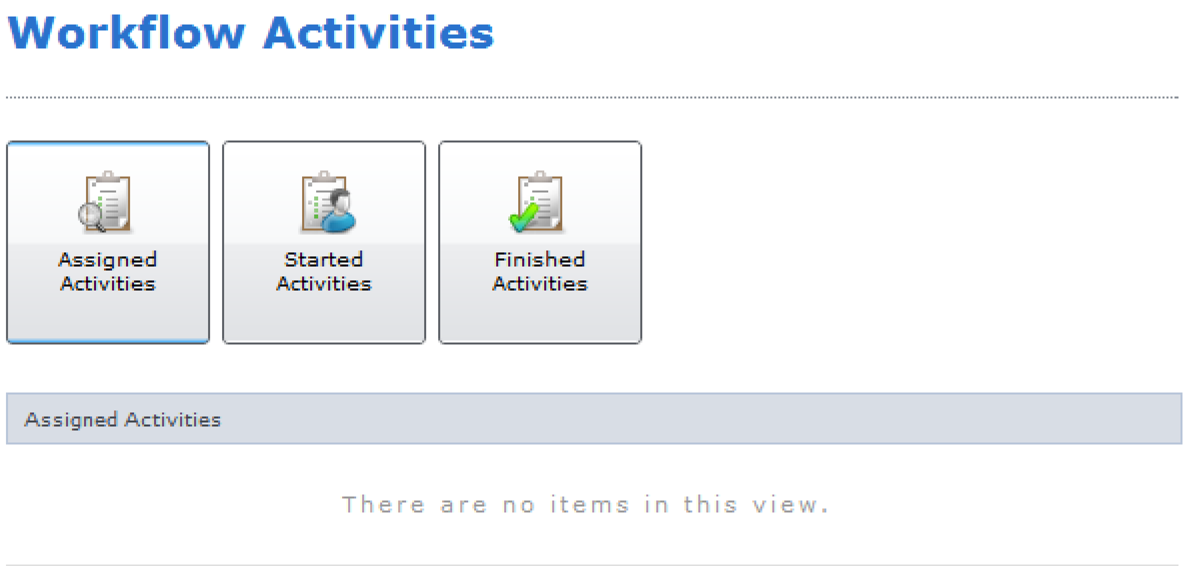



It distinguishes:

- the version of the user interface, Content Manager Explorer
- the version of the underlying system
- the update version, indicating which product update is running. SDL periodically releases product updates.

## 2.2.6 Dashboard - Workflow Activities screen

The **Workflow Activities** screen in the Dashboard shows you Workflow Activities assigned to your Group, started by you, and finished by you. From this screen, you can also start and finish Activities you see.




**Assigned Activities**

Click **Assigned Activities** to see Activities assigned to the Group or Groups you belong to, or to you personally. Click any item in the list to see details about the Activity, such as the Content Manager items associated with this Activity, and to pick up or reassign this Activity (by clicking **Start Activity** or **Reassign Activity**, respectively).

**Started Activities**

Click **Started Activities** to see Activities you picked up but did not yet finish. Click any item in the list to see details about the Activity, such as the Content Manager items associated with this Activity, and to finish or reassign this Activity (by clicking **Finish Activity** or **Reassign Activity**, respectively).

**Finished Activities**

Click **Finished Activities** to see Activities you performed and finished. Click any item to see details about the Activity, such as the Content Manager items associated with this Activity.

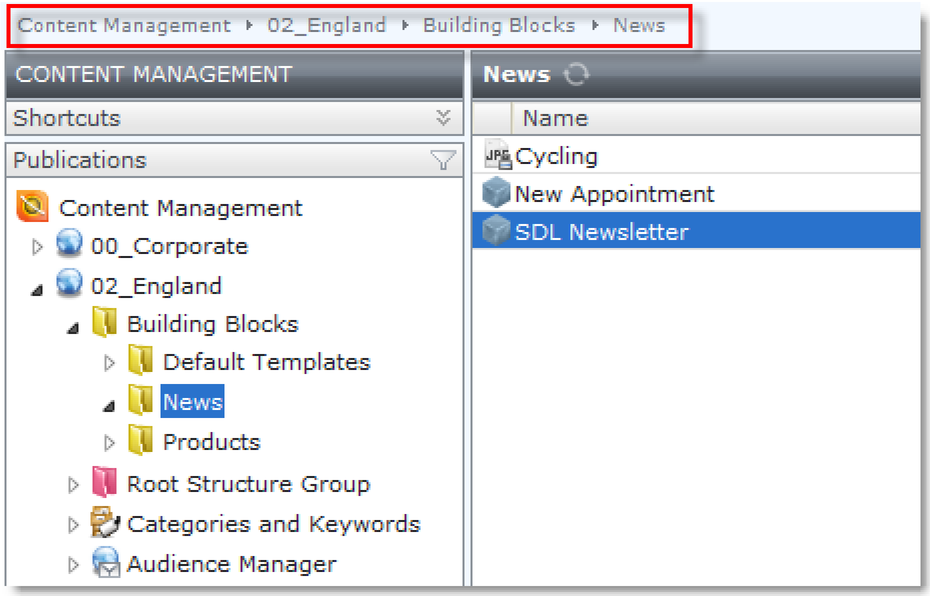
The **Related Items** area shows the list of items associated with the current Activity.

Click the **Open** button at the right of an item to open the item in a dialog.

## 2.3 Breadcrumb trail

The breadcrumb trail shows the path to your current location in the navigation tree on the left.

The breadcrumb trail is located directly under the Ribbon in the main screen of Content Manager Explorer, on the left:




You can click on any of the node names in the breadcrumb trail to jump to the corresponding node in the tree and load the contents of that node in the content area.

## 2.4 Info Bar

The Info Bar, at the top right of your screen, displays your name, notifications, and Workflow items.

## 2.5 Content Manager Explorer options

The Content Manager Explorer options bar allows you to set your Content Manager Explorer user preferences; access the User Manual online; e-mail a link to a Content Manager item; add a Content Manager item to your favorites; and create shortcuts to Content Manager items.

### 2.5.1 Setting your user preferences

Use the Info Bar at top right to configure your personal preferences: user interface language, regional settings (locale), and search settings.

#### Context

### Steps to execute

1. To change your user interface language, click on your name or profile picture at the top right part of the screen and in the dialog that opens, in the **Language & Locale** area, select your preferred language from the **Language** dropdown and click **OK**.

2. To change your regional settings, such as how dates, numbers and currencies are displayed, click on your name or profile picture at the top right part of the screen and in the dialog that opens, in the **Language & Locale** area, select your preferred language and country from the **Regional Settings** dropdown and click **OK**.

3. To change the maximum number of search results you see, click on your name or profile picture at the top right part of the screen and in the dialog that opens, in the **Search Settings** area, select a number (50, 100, 250 or 500) from the **Maximum Number of Search Results** dropdown and click **OK**.

### Result

Your preferences are updated and affect both Content Manager Explorer and Experience Manager .

## 2.5.2 Viewing the User Manual online

To view the User Manual for Content Manager Explorer online, select the **Dashboard** ribbon tab, select **Help & Community** on the left, and click **Topics for Authors and Editors** on the right.

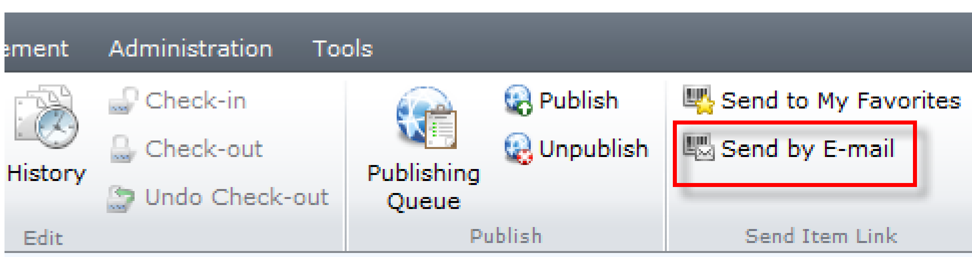
## 2.5.3 E-mailing a link to a Content Manager item

You can e-mail a link to any item in the Content Manager.

### Steps to execute

1. In the main screen, select an item for which you want to send a link, or open the item in a dialog.

2. Access the **Home** tab of your Ribbon and select the button **Send by e-mail**, located on the right.




Your standard e-mail client opens a new e-mail containing the link to the current item.

3. Fill in an e-mail address and, if you like, a subject and additional body text. Then send the e-mail.

## 2.5.4 Adding a Content Manager item to your favorites

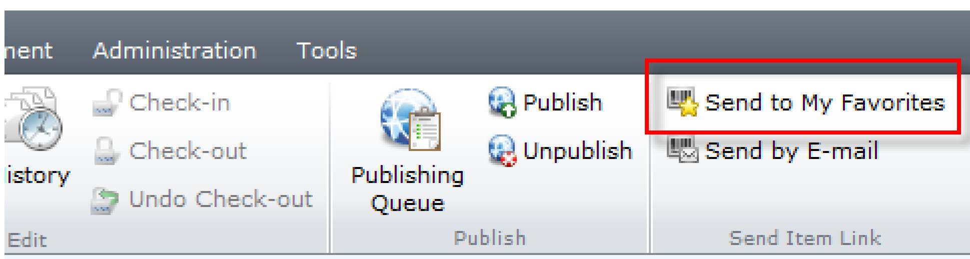
If you access an item (for example a Component) or location (for example a Folder) in the Content Manager frequently, you can add the item to your browser favorites or bookmarks.

### Context

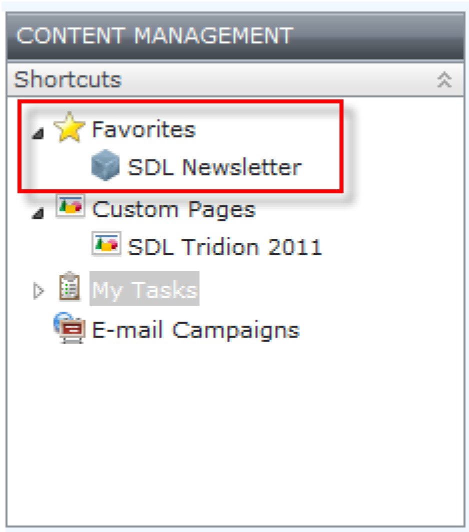
Note: If you use the standard **Add to favorites** or **Add to bookmarks** option, your browser will add only the Content Manager Explorer window to your favorites or bookmarks, not the individual item.

### Steps to execute

1. In the main screen, select an item for which you want to create a bookmark or favorite, or open the item in a dialog.
2. Access the **Home** tab of your Ribbon and select the button **Send to my favorites**, located on the right.

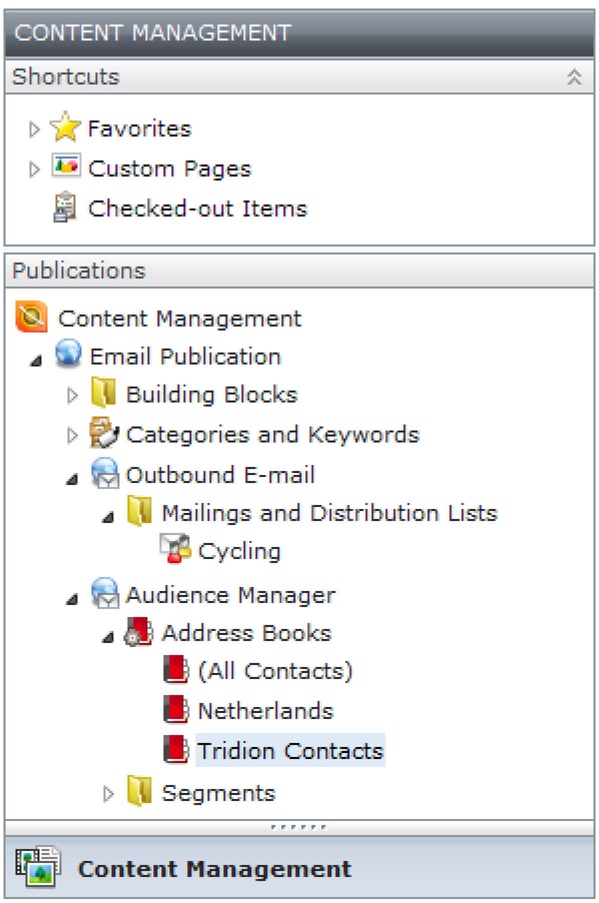



The link appears in the **Shortcuts** > **Favorites** pane:

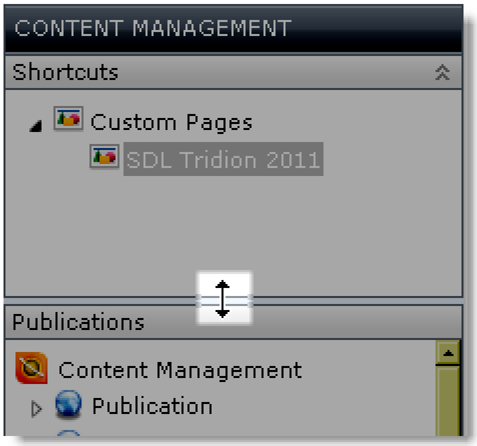



## 2.6 Navigation pane

The *navigation pane* located on the left-hand side of the screen is the area is where you navigate to the various areas of the application.



The lower half of the navigation pane shows you the Publications you have access to. You can resize this area by grabbing it with your mouse:




You can open each Publication to see the items inside.

Use the area called **Shortcuts** at the top of the navigation pane for quick access to locations or items you visit most often, such as Custom Pages. You can hide or show your **Shortcuts** area by clicking the expand/collapse button.

# 2.7 List view

The list view displays the items within a Folder or Structure Group or the results of a search. This section describes how to filter, open, move, copy and paste, and delete items in the list view.

## 2.7.1 Opening an item from the list view

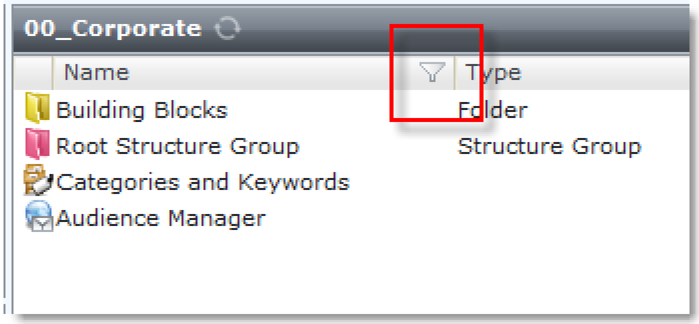
You can open an item from the list view by double-clicking the item, using the Open icon in the main toolbar, or using a context menu.

A window displays the item you selected. If another user has opened the item in edit-mode, you will view the item as read-only.

## 2.7.2 Filtering the list view using list columns

When viewing items in the list view, you can filter the items that are displayed by filtering the columns.

To filter a column, click the filter icon on the right hand corner of a column header:



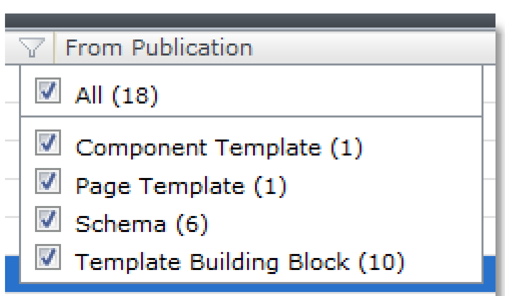

When you click this icon, the filtering options that appear depend on the type of column you are filtering:

**Open set of values**

If the number of values in the column is open-ended, clicking the filter icon displays up to seven value ranges to pick from (for example, A-F, G-M, N-S and T-Z). You can clear or select each range to hide or show those values.

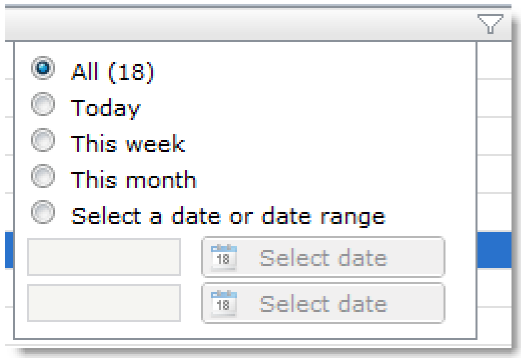

**Closed set of values**

If the number of values in the column is closed (that is, if it has only a fixed set of possible values), clicking the filter icon displays each value as a separate option. You can clear or select each range to hide or show those items.

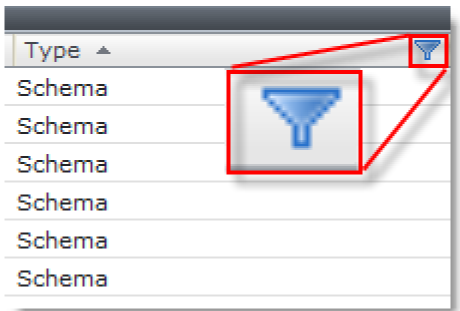



**Date and time values**

If the values are moments in time, clicking the filter icon displays a custom set of options to select typical time ranges, including the option to set a custom date/time range. If you select this option, use the **Select date** buttons to pick a date and time for the beginning and end of your date/ time range.




After you select a filter, the filter icon turns blue, indicating that your current list view is filtered.

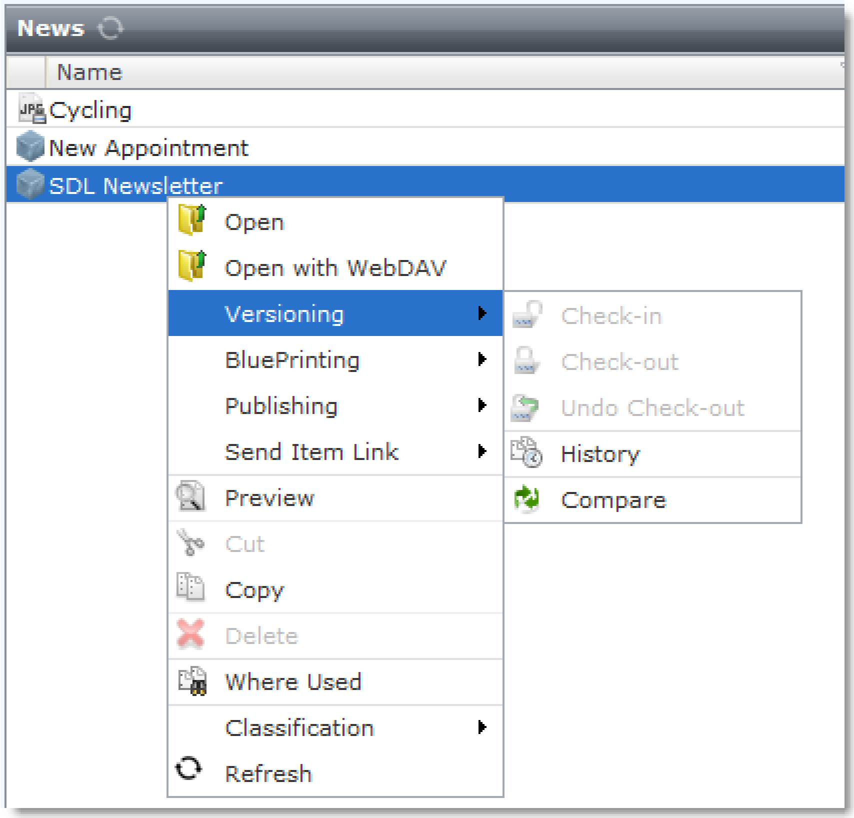



## 2.7.3 Using context menus

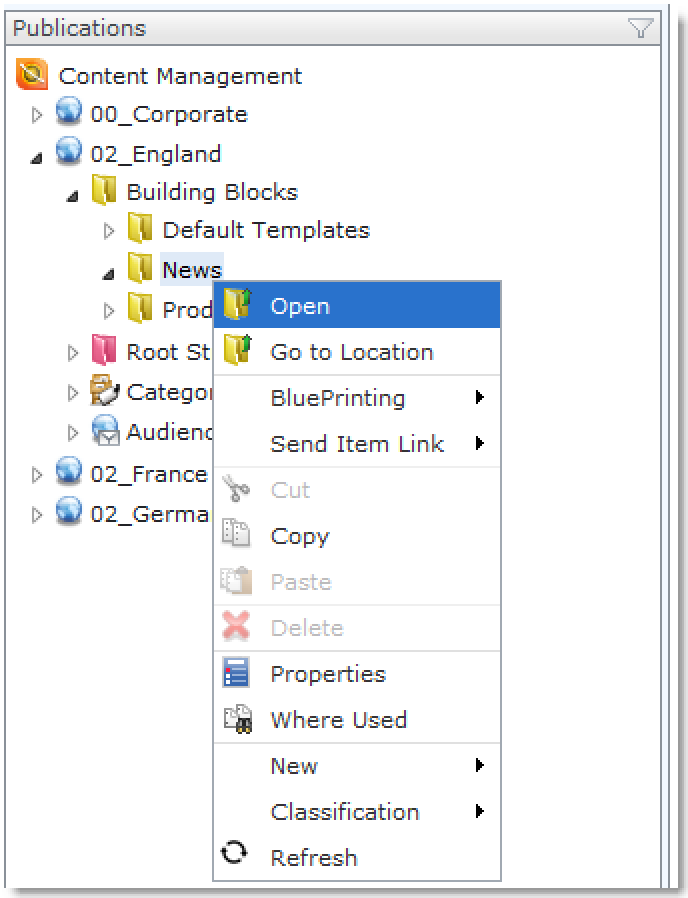
You can access a context menu for items in the navigation pane or list view by right clicking on the item.

The menu will display commands that are commonly associated with the item that you have selected.

The following image shows a context menu for a Component:




The following image shows a context menu for a Folder:




## 2.7.4 Working with multiple items displayed in the list view

You can perform some actions on more than one item at a time.

### Steps to execute

1. To perform an action on multiple items, in the list view, select the items you want to work with. To select non-sequential items, press **Ctrl** and then click on each item individually.

2. Do one of the following:
   - Click a Ribbon icon
   - Right-click and select an option from the context menu

## 2.7.5 Moving an item

You can perform Cut & Paste actions to restructure your content. You move items in the list view to a different Folder or Structure Group within the same Publication, or for Keywords to a different location in the same Category.

### Requirements

You require the rights that allow you to modify that object as well as the following permissions:

- Delete permission for the containing Folder, Structure Group, or Category
- Write permission for the Folder, Structure Group to which you want to paste the item

You will not be able to cut and paste an item if:

- The item is a local copy or a shared item.
- The item is checked-out, in Workflow, or published.

It is not possible to move items between different Publications, or between Folders, Structure Group and Categories, or between one Category and another Category.

### Context

To move items, you cut and paste selected items. If you move a Folder, Structure Group, or Keyword you also move all items that are contained within it.

### Steps to execute

1. Navigate to the Publication and Folder or Structure Group that contains the item you want to move.
2. From the list view, select one or more items.
3. Click **Cut** on the **Home** tab of the Ribbon.
4. From the navigation pane, select the Folder, Structure Group to which you want to move the item(s).
5. Click **Paste** on the **Home** tab of the Ribbon.

### Result

The Content Manager moves the item to a different location in the Publication.

## 2.7.6 Copying and pasting an item

You can create a copy of an item within the same Publication.

### Requirements

You require the rights that allow you to modify that object as well as the following permissions:

- Read permission for the containing Folder, Structure Group, or Category
- Write permissions for the Folder, Structure Group, or Category to which you want to paste the item

#### Context

If you create a copy of a Folder, Structure Group, or Keyword, you create a copy of all items that are contained within it as well. If an item is in Workflow or if a different user has it checked out, you can only create a copy of the last checked-in version of the item.

#### Steps to execute

1. Navigate to the Publication and Folder, Structure Group, or Keyword that contains the item(s) you want to copy.

2. From the list view, select the item(s) you want to copy.

3. Click the **Copy** icon on the **Home** tab of your Ribbon.

4. Select the Folder, Structure Group, Category or Keyword to which you want to copy the item(s) and click the **Paste** on the **Home** tab of your Ribbon.

#### Result

The Content Manager creates a copy of the item. If you paste the item in an Organizational Item (Folder, or Structure Group, or Category) that already has an item of the same name, the item is renamed with the prefix "`Copy <x> of ...`", where <x> is a number. For example "`Copy 2 of Article`". The Content Manager gives the copy a version number "1.0". The copy has no version history.

### 2.7.7 Deleting an item

You can delete an item to remove it from the Content Manager. If you delete a Folder, Structure Group, or Category you delete all items contained within it as well.

#### Requirements

To delete an item, you must have delete permissions for the Folder, Structure Group or Category in which the item is stored as well as rights for that item. You cannot delete an item if:

- The item is used:
  - The Component is embedded on a Page.
  - The Component is used as a Component link or a Multimedia Component link in another Component or metadata field.
  - The Keyword is used in a Component field or Metadata field
- The item is localized in a Child Publication
- The item is published
- The item is in Workflow
- The item is checked out
- The item is not a local item (that is, the item is a local copy or a shared item)

#### Context

Note: To see if the item is used, open the item and click the **Show Where Used** icon in the toolbar. For information about the Where Used functionality, see Where used (see page 57).

### Steps to execute

1. To delete an item, in the **Content Management** view, navigate to the Publication and Folder, Structure Group, or Category that contains the item(s) you want to delete.
2. From the list view, select the item(s) you want to delete.

   Note: For information about selecting multiple items, see Working with multiple items displayed in the list view (see page 42)

3. Click the **Delete** icon on the **Home** tab of the Ribbon.

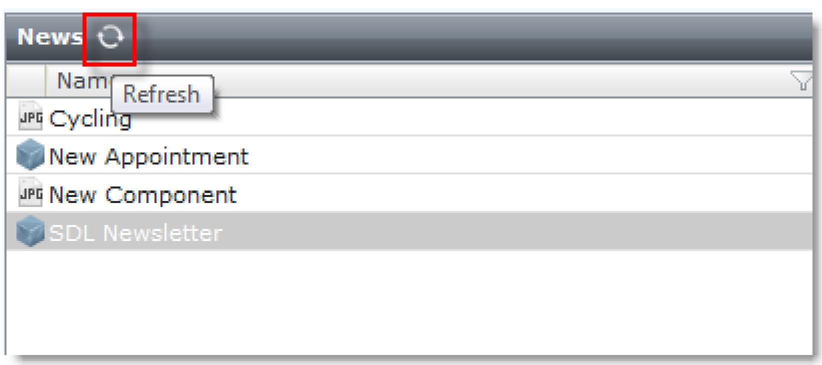
   Note: If you selected a Keyword, your are prompted whether to delete just the Keyword or the Keyword Branch (all its child Keywords). If you just delete the Keyword, the child Keywords are moved up one level in the tree structure.

### Result

The Content Manager deletes the item or items. You cannot retrieve items after you delete them. If your select multiple items for deletion, the Content Manager only deletes the items that meet the prerequisites.

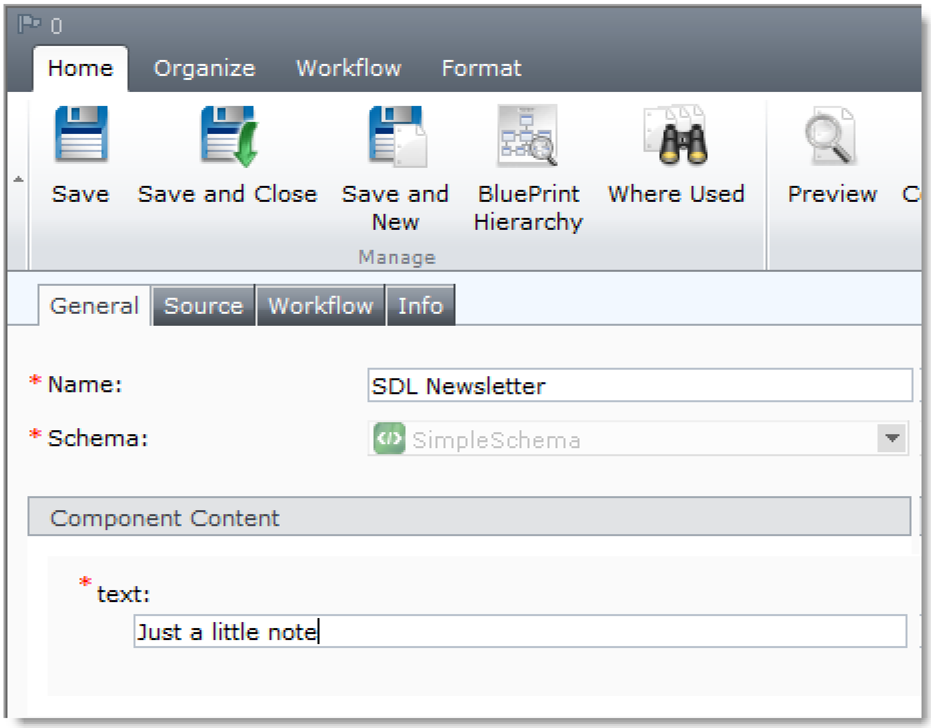
## 2.7.8 Refreshing the list view

The contents of the list view are normally up-to-date. However, if you do not see an item you would expect to find, click the **Refresh** button in the bar above the list to manually refresh the list.



## 2.8 Edit window

When you open or create an item, an edit window opens. The edit window displays the fields you use to edit or create an item.

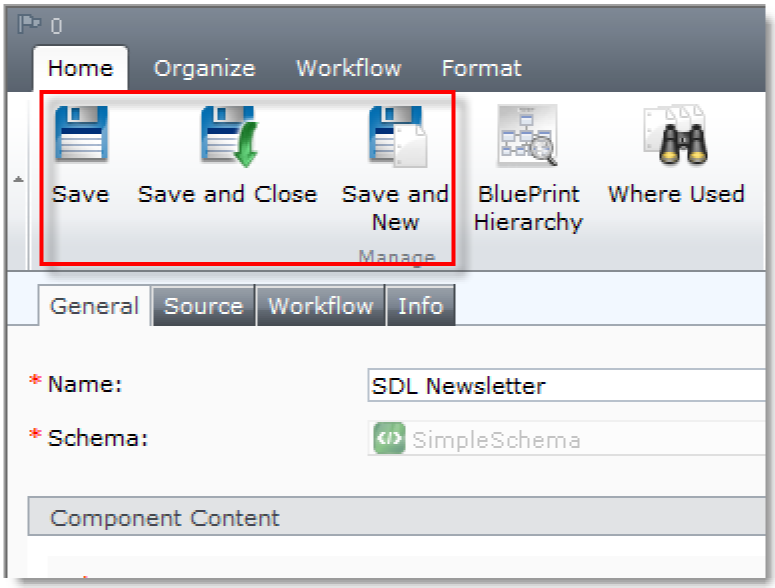



Edit windows also have their own Ribbons, giving you access to the actions you can perform on the item. See Ribbon controls (see page 19) for a description of the controls available on the Ribbon.

### Saving an item

When you have completed work on an item, you can save the item using one of three options in the **Home** tab of the Ribbon:

- **Save** saves the current changes you made to the item, the window remains open.
- **Save and close** saves the changes you made to the item and closes the item.
- **Save and new** saves the changes you made to the item, closes the item, and opens a window in which you can create a new item of the same type.




## 2.9 Content Manager Explorer Message Center

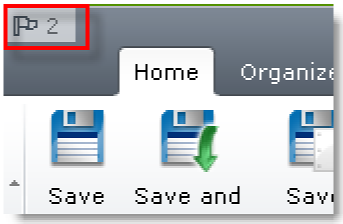
To provide information, issue warnings and report errors, Content Manager Explorer uses the Message Center.

The Message Center displays messages in the following ways:

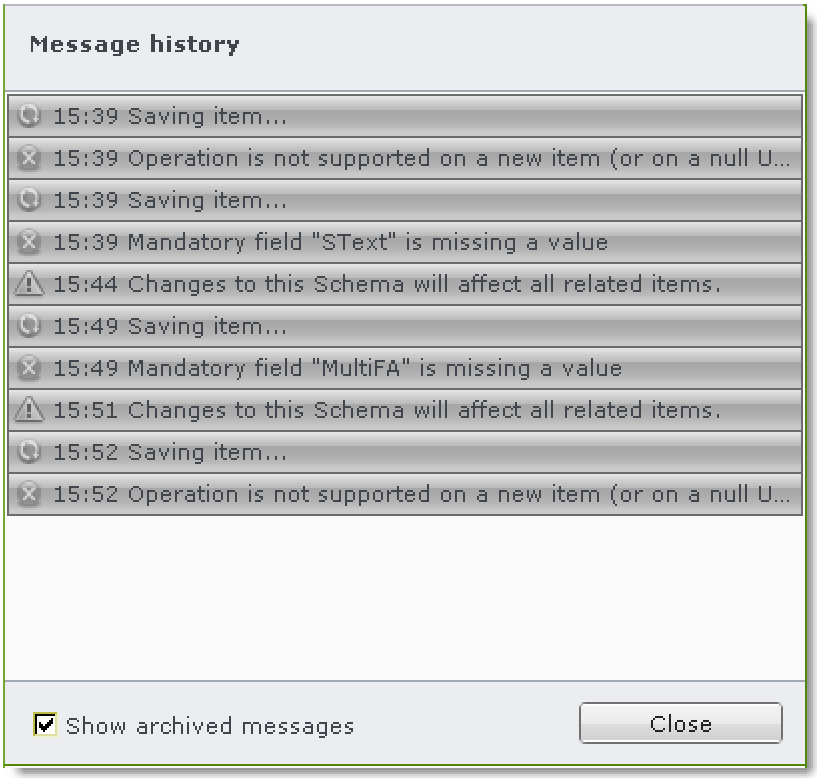
- In the top area of the interface, a message can appear in the center. The icon and color of the message indicate the nature of the message. For example, this warning appears when a user opens an existing Schema for editing:


  You can click the close icon at the right hand side to dismiss a message.
- A popup can open in the center of the screen. For example, this error message explains that a mandatory field was not filled in:


At any time, you can see all messages produced by the Message Center by clicking the flag icon at top left. The number next to it indicates the number of messages not yet dismissed.




This opens a dialog showing all messages that were displayed during this session. Clear **Show archived messages** to see only messages that were not yet dismissed.




You can get detailed information about a message by double-clicking it. A more verbose version of the message now appears in a separate popup.

## 2.10 Shortcut keys

You can use the following keyboard shortcuts to navigate and use items in Content Manager Explorer:

**Refresh**

As a general rule, pressing **F5** will refresh any list displayed in the currently active window.

**Input field shortcut keys**

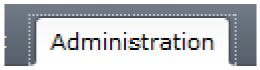
The following table describes the shortcut keys that can be used in input fields:

| Key | Action | Field types |
|---|---|---|
| Ctrl+X or ⌘+X | Cut | Plain text, Format Area, Number |
| Ctrl+C or ⌘+C | Copy | Plain text, Format Area, Number |
| Ctrl+V or ⌘+V | Paste | Plain text, Format Area, Number |
| Ctrl+Z or ⌘+Z | Undo | Plain text, Format Area, Number |
| Ctrl+Y or ⌘+Y | Redo | Plain text, Format Area, Number |
| Ctrl+A or ⌘+A | Select All | Plain text, Format Area, Number |
| Ctrl+B or ⌘+B | Bold | Format Area |
| Ctrl+I or ⌘+I | Italic | Format Area |
| Ctrl+U or ⌘+U | Underline | Format Area |
| Ctrl+L or ⌘+L | Align left | Format Area |
| Ctrl+R or ⌘+R | Align right | Format Area |
| Ctrl+E or ⌘+E | Align centered | Format Area |
| Ctrl+K or ⌘+K | Insert Link (not in Chrome) | Format Area |
| Ctrl+. or ⌘+. | Create bulleted list (Format Area only) | Format Area |
| Ctrl+Left | Move one word to the left | Plain text, Format Area, Number |
| Ctrl+Right or | Move one word to the right | Plain text, Format Area, Number |
| Ctrl+Home | Move to start of input field (Windows only) (not in Firefox) | Plain text, Format Area, Number |
| ⌘+Left | Go to start of line | Plain text, Format Area, Number |
| ⌘+Right | Go to end of line | Plain text, Format Area, Number |
| Ctrl+End | Move to end of input field (Windows only) | Plain text, Format Area, Number |
| Ctrl+Delete | Remove current word from current cursor position (Windows only) | Plain text, Format Area, Number |

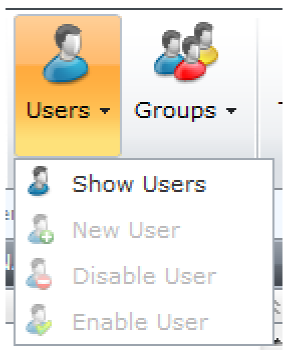
### Content Manager Ribbon shortcut keys

You can use a number of shortcut keys to navigate through the items in the Ribbon:

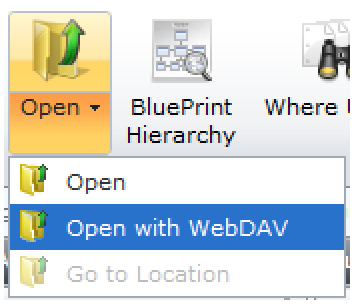
- To start navigating through the Ribbon controls, first press Ctrl+F6 or ⌘+F6. This shows your currently open Ribbon toolbar as having focus by displaying a dotted line around it.




- You can now select other tabs using the Left and Right arrow keys on your keyboard.
- To open a tab and show its controls, select it and press Enter.
- You now selected the first button in the Ribbon tab. Again, use the Left and Right arrows to navigate to the button you want to use and do one of the following:
  - If you have selected a normal button, press Enter to execute the command.
  - If you have selected a button that always opens a dropdown menu, press Enter or the Down arrow to open the dropdown menu.




  - If you have selected a button that has a primary command, plus a number of special commands in a dropdown menu, press Enter to execute the primary command, or the Down arrow to open the dropdown menu.




- If you opened a dropdown menu, use the Up and Down arrow keys to navigate through the menu options, and Enter to select one.
- Use the Escape button to go back up a level in the Ribbon (from dropdown menu to a tab, or from a specific tab to the list of tabs).

### Content Manager navigation pane shortcut keys

The following table describes the shortcut keys that you can use to navigate between items in the Content Manager Explorer navigation pane:

| Key | Result |
|---|---|
| Up | Move up one node. |
| Down | Move down one node. |
| Left | Close an expanded node or go to Parent node. |
| Right | Expand a closed node or go to first Child in the node. |
| Home | Go to the root of the navigation pane. |
| End | Go to the last node in the tree. |
| Enter | If you selected another node, go to the selected node. |
| Page Up | Go to the first node on the Page. |
| Page Down | Go to the last node on the Page. |
| Backspace | Go to the Parent. |
| Ctrl+X or ⌘+X | Cuts the selected node. |
| Ctrl+C or⌘+C | Copies the selected node. |
| Ctrl+V or ⌘+V | Pastes a copied or cut node. |
| Delete | Deletes the selected node. |

### Content Manager list view shortcut key

The following table describes the shortcut keys that you can use to navigate between items in the list view:

| Key | Action |
|---|---|
| Home | Select the first item in the list |
| End | Select the last item in the list |
| Up | Select the previous item in the list |
| Down | Select the next item in the list |
| Page Up | Scroll up one page, select the first item |
| Page Down | Scroll down one page, select the last item |
| Enter | Execute default action |
| Escape | Clear selection |
| Shift | Select a range of items |
| Ctrl | Add or remove an item from the selection |
| Space | Left mouse click |
| Ctrl+X or ⌘+X | Cut |
| Ctrl+C or ⌘+C | Copy |
| Ctrl+V or ⌘+V | Paste |
| Delete | Delete currently selected item(s) |

The default action for the list view is one of the following:

- Open the item
- If the user checked out the item, edit the item

- If the item is a Folder, Structure Group, or Publication, show the list of items contained within it.

## 2.11 Remembered settings

When you close your browser the Content Manager Explorer remembers the last visited location in the Publication tree, whether the toolbar Ribbon was collapsed or expanded, the Target Types selected when you last published content and your **Publish settings**.

Note: Your **Unpublish settings** and **Advanced** settings are not kept.

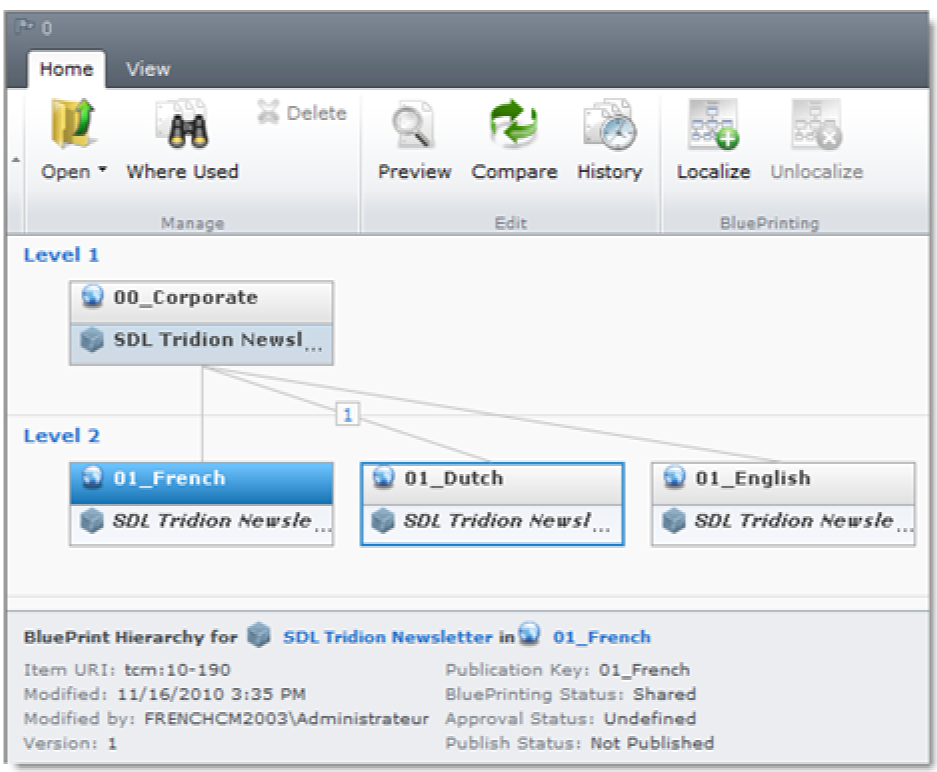
# Chapter 3 BluePrinting

A BluePrint is a hierarchy of Publications in which Parent Publications share content with Child Publications. BluePrinting enables you to reuse structure, content, and design between Publications.

The key terms used in BluePrinting are:

- **BluePrint** — A BluePrint establishes the relationships between Publications and enables your organization to share and manage items within multiple Publications.
- **Root Parent** — A Root Parent Publication is the first Publication in a BluePrint. It contains only items created within that Publication. A Content Manager system can contain multiple BluePrints. When you create a BluePrint, all Publications in the BluePrint share the Root Structure Group from the Primary Parent.
- **Parent** — A Parent Publication shares items to one or more Publications called Child Publications. A Parent Publication can also be a Child Publication.
- **Child** — A Child Publication mirrors the Parent Publication. A Child Publication can also contain local content that you can combine with shared content.

The **BluePrint Viewer** provides a visualization of the Parent-Child relationships within a BluePrint and the BluePrint relationship between items:



## 3.1 Shared items, local copies and local items

Child Publications can contain a combination of shared items, local copies and local items.

**Shared items**

Shared items are items inherited from Parent Publications. These items are read-only items unless you create a local copy.

**Local copies**

Local copies are shared items that have been localized. Localizing is the process of creating a local copy of a shared item which can then be modified locally.

**Local items**

Local items are items that have been created in the Child Publication.

## 3.2 Items affected by BluePrinting

Performing actions on a BluePrint item may affect other Publications in the BluePrint due the relationship between BluePrint Publications.

**Items shared in a BluePrint**

The following Content Manager items are shared from Parent Publications to Child Publications.

- Folders and Structure Groups that define how content is organized
- Schemas, Components and Pages that define content
- Component Templates, Page Templates and Template Building Blocks that define the look-and-feel and behavior of content
- Target Groups that define types of users (for personalization)
- Process Definitions that define Workflow
- Categories and Keywords used for classification and metadata
- Search Folders that contain search results

**Actions affecting items in a BluePrint**

The following table describes the general rules that apply when performing certain actions on an item in a BluePrint:

| Action | General rule |
|---|---|
| create | An item created in a Publication is a local item. If the Publication is a Parent Publication, this item is shared to any Child Publications. You can create a local item in a Parent or in a Child. |
| edit | You can edit local items or local copies. Any changes made to these items are shared to Child Publications unless the Child Publication contains local copies of these items. |

| Action | General rule |
|---|---|
| cut/paste | You can cut and paste any local item within a Publication. You cannot cut and paste between Publications. You must have write and delete permissions to cut and paste an item. |
| copy/ paste | You can copy and paste any local item within a Publication. |
| delete | You can only delete unused local items. |
| localize | You can create a local copy (localize) any shared item in a Publication. This permits you to edit the item. |
| unlocalize | You can unlocalize a local copy to use the original shared item. |
| publish | You can publish a Component, Page, Structure Group, or Publication. Only items within active Structure Groups are published. |
| unpublish | You can unpublish a Component, Page, Structure Group, or Publication to remove the item from the Published site. |

## 3.3 BluePrint example

A corporate Web site may have local sites in multiple countries, all of which have specific language and local content requirements. The following BluePrint shows a corporation which has Web sites for the following countries:

- A Belgian site that requires French and Dutch content
- A Netherlands site that requires Dutch and English content
- A German site that requires English and German content

All the sites share the same design. Therefore, they share the same Page Templates and Component Templates. They also share the same content structure of Folders and Structure Groups. In this scenario, users at the corporate level create some of the content. They share this content, and translators translate it into the four languages. Language specific country Publications can share the translated information and can add local content. When users create Pages in these Publications and publish them, the resulting Web sites can include multilingual and region-specific information.

## 3.4 Localizing or unlocalizing items

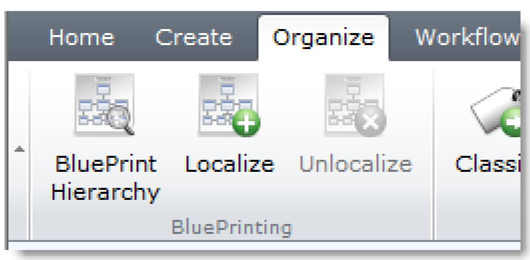
If you are working in a Child Publication, to modify the content of shared items you must create a local copy which then becomes editable. If you do not want to use the local copy of an item, you can also unlocalize the item. If you unlocalize, you will again use the shared item.

### Requirements

To localize or unlocalize an item, you must have Localize permissions for the Folder or Structure Group in which the item is stored.

### Steps to execute

1. To localize or unlocalize an item, navigate to the location in the tree that contains the item you want to localize.
2. In the list view, select the item you wish to localize or unlocalize and in the **Organize** tab of the Ribbon, do one of the following:
   - Click **Localize** to create a local copy.
   - Click **Unlocalize** to go back to the original shared item.




Important:If you unlocalize, the local copy is irretrievable. All changes are lost.

### Result

You have localized or unlocalized an item.

## 3.5 Where used

Where used functionality allows you to view the relationship between Content Manager items.

### Context

Content Manager items are used together to create Web site content or content for other channels. For example, a Page uses a combination of Components and Component Templates, a Page Template and Keywords.

In the Content Manager you can use the **Where Used** feature on an item to view:

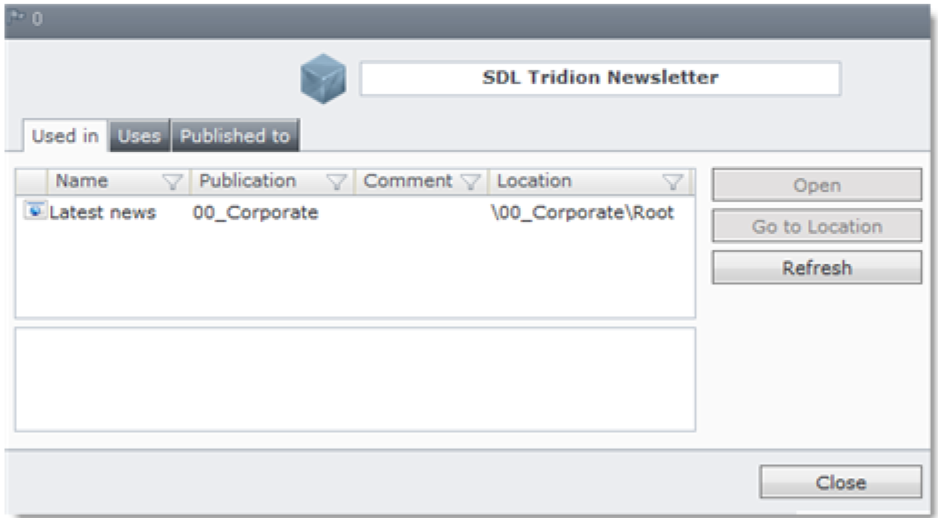
- Which other items use the item
- Which other items the item uses
- To which Publication Targets the item has been published

Note: Similar functionality is also provided by the **Related Items List View**, available when you select a Keyword. The view displays the Components, Pages, and other Content Manager items that have been tagged with the selected Keyword, or Keyword branch, allowing you to see related content. For more information, see Viewing related content (see page 151).

### Steps to execute

1. Open the Content Manager Explorer.
2. Do one of the following:
   - Select an item and choose **Where Used** in the context menu.
   - Select an item and choose **BluePrinting** > **BluePrint Hierarchy** in the context menu to open the **BluePrint Viewer**. Select the item in one of the Publications in the BluePrint hierarchy and click **Where used**.

   The **Where used** dialog opens:




3. To view where an item is used, click the **Used In** tab. The tab displays a list of items that use the item you selected:
   - To edit an item in the list, select the item and click **Open**.
   - To view the location of an item in the list, select the item and click **Go To Location**.
4. To view a list of items this item uses, click the **Uses** tab:
   - To edit an item in the list, select the item and click **Open**.
   - To view the location of an item, select the item and click **Go To Location**.
5. To view Published to information for a Page, Component, Component Template, or Page Template, click the **Published to** tab.
6. Click **Close** to exit **Where used**.

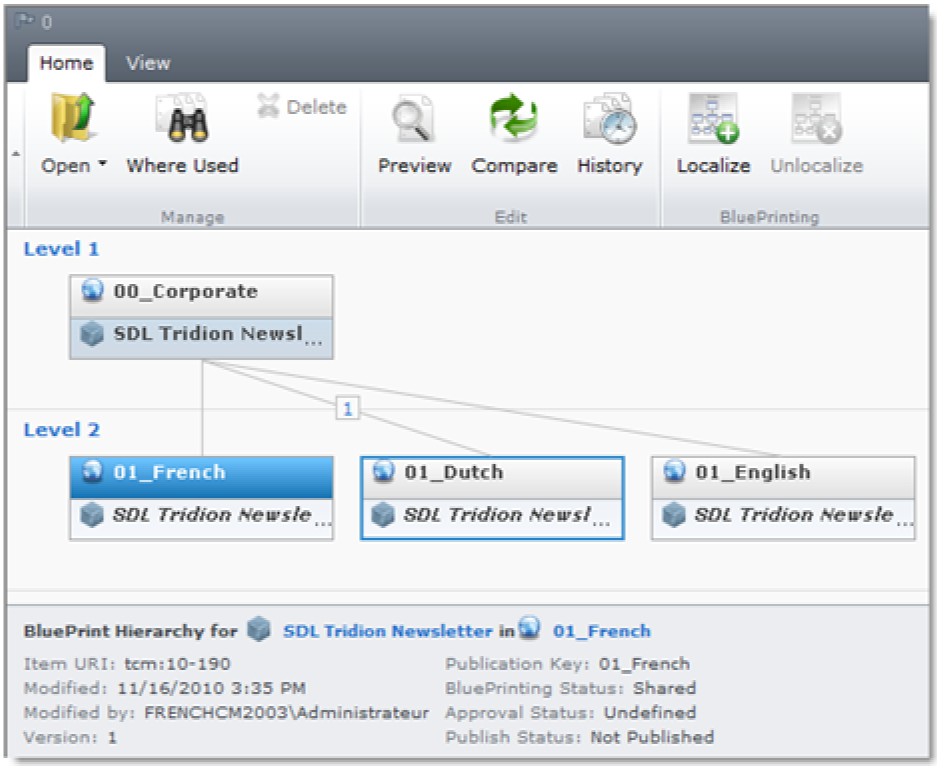
## 3.6 BluePrint Viewer

The **BluePrint Viewer** provides a visualization of the Parent-Child relationships within a BluePrint and the BluePrint relationship between items:.

### Context

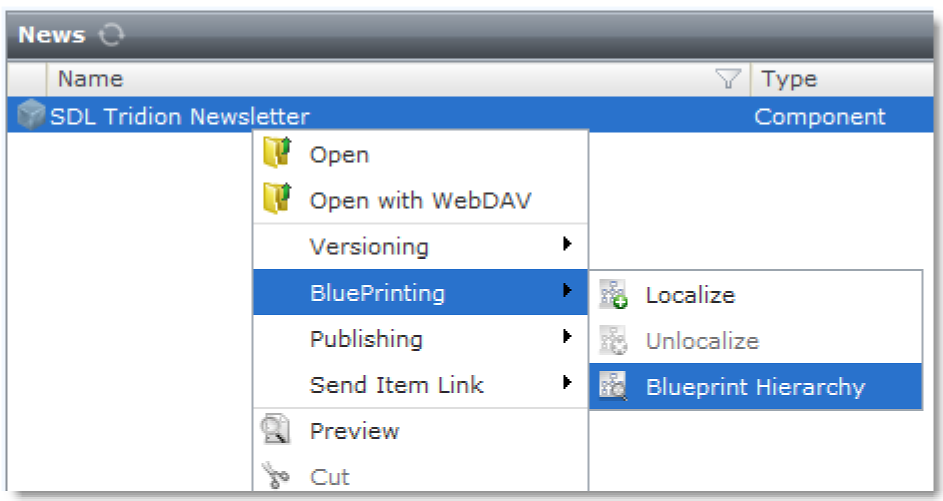
The **BluePrint Viewer** consists of:

- The **Home** tab in which you can perform actions on a selected item in the BluePrint hierarchy diagram (these actions are also available in context menus)
- The **View** tab in which you can change the view of BluePrint relationships
- The BluePrint hierarchy diagram displayed in the **BluePrint Viewer** and the information displayed in it.

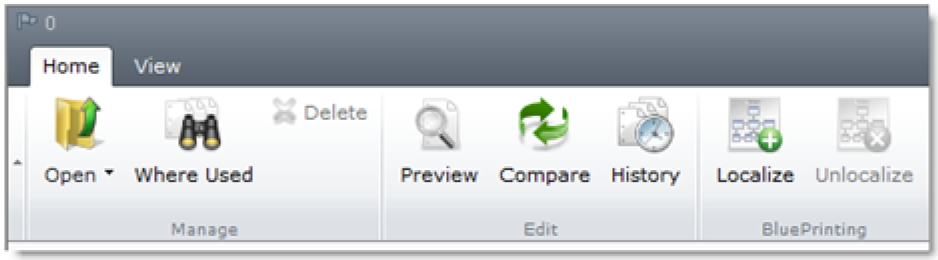



## Steps to execute

1. In the Content Manager Explorer, select an item and choose **BluePrinting** > **BluePrint Hierarchy** in the context menu:



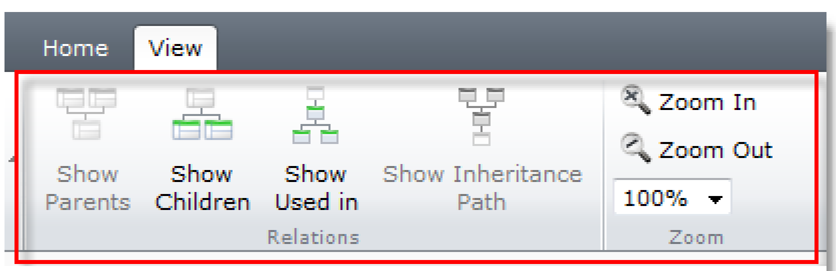

2. In the **Home** tab of the **BluePrint Viewer** you can perform the following actions on the selected item:




- **Open**—allows you to navigate to open an item displayed in the BluePrint hierarchy for editing.
- **Where Used**—allows you to see where an item is used (for more information, refer to Where used (see page 57)).
- **Delete**—allows you to delete an item provided you have the necessary rights and permissions for that item and the item is not being used. For more information, see Deleting an item (see page 44).
- **Preview**—allows you to Preview an item.
- **Compare** —allows you to compare two different versions of Components, Component Templates, Page Templates, Pages, or Schemas. For more information, see Comparing two versions (see page 166).
- **History** —lists all versions of a Component, Component Template, Page Template, Page, or Schema. For more information, see Version history (see page 165).
- **Localize** —allows you to create a local copy of a shared item.
- **Unlocalize** —allows you to unlocalize the local copy of an item in a Child Publication and use the shared item from the Parent Publication.

Important:Unlocalizing an item deletes the localized version entirely from the system.

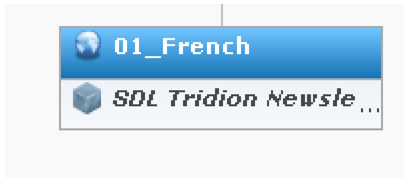
3. In the **View** tab of the **BluePrint Viewer**, you can **Zoom in** and **Zoom Out** of the diagram and perform the following actions:




- **Show Parents**—select an item/Publication and click **Show Parents** to highlight the selected Publication's Parents (the Publications that are not Parents of the selected Publication are dimmed out).
- **Show Children**—select an item/Publication and click **Show Children** to highlight the selected Publication's Children (the Publications that are not Children of the selected Publication are dimmed out).

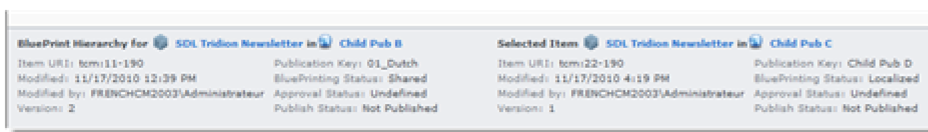
- **Show Used in**—click **Show Used in** to view the items the item is **Used in**.
- **Show Inheritance Path**—select an item and click **Show Inheritance Path** to highlight where the item shares its content from.

4. In the BluePrint hierarchy diagram displayed in the **BluePrint Viewer**, the following visual indicators are used:
    - A solid blue background indicates the Publication from which **BluePrint Viewer** was invoked:



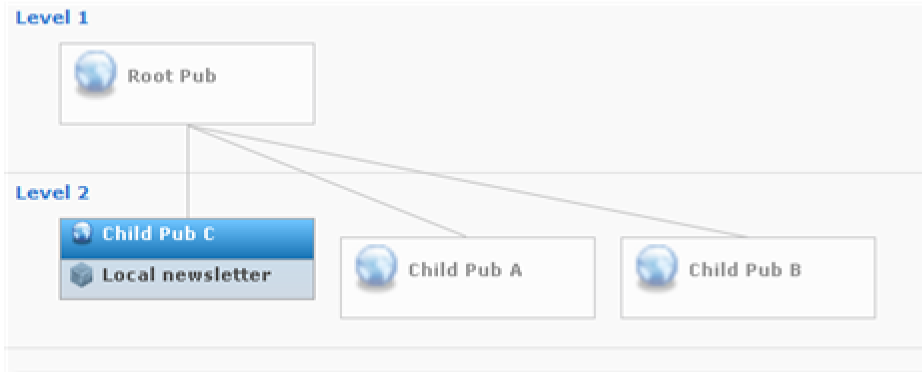

    - A blue border indicates the current item (the context item) selected in the BluePrint:


    - Information about the item from which the **BluePrint Viewer** was invoked (the context item) and the currently selected context item is displayed at the bottom of the viewer:




    - The name of shared items are displayed in italics:


    - Publications which do not contain a copy of the selected item are dimmed:




- If an item has been localized in a Child Publication, the line to the Parent Publication is dotted:


5. Click **Close** to exit the **BluePrint Viewer**.

# Chapter 4 Components

You define all content in the Content Manager in Components. To ensure that content is consistent, the Content Manager bases all content on Schemas. Schemas define fields and field types for specific types of content.

For example, you may need to create a press release. Your SDL Tridion system administrator created a Schema that defines what types of content the press release can contain. This example Schema may contain the following fields:

**Title**

a text field in which you type text

**Summary**

a text field in which you type text

**Date**

a date selection field

**Body**

a text field in which you can type and format text

**Company Information**

a Component Link field in which you select an existing Component that contains company information

**Logo**

a multimedia link field in which you can link to an existing multimedia Component that contains an image

You enter content into these predefined fields, and thereby ensure that all press releases have consistent structure and content types. This section describes how to create and use Components in the Content Manager Explorer. Multimedia content is saved in multimedia Components. For information about multimedia Components, see Multimedia Components (see page 99).

## 4.1 Creating a Component

You create a Component by selecting a Schema that defines the type of Component that you want to create. You can then fill in the fields for the Component as defined by the Schema.

### Requirements

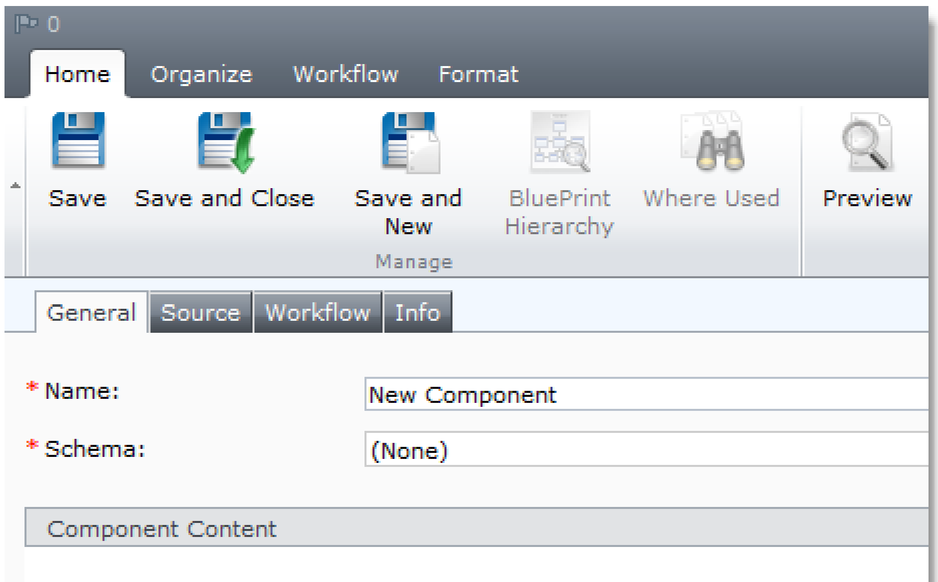
To create a Component you must have Component Management rights and Write permissions for the containing Folder.

## Context

For example, your organization may have a Schema called "Press Release" upon which all press release content is based. You create Components in Folders within a Publication.

## Steps to execute

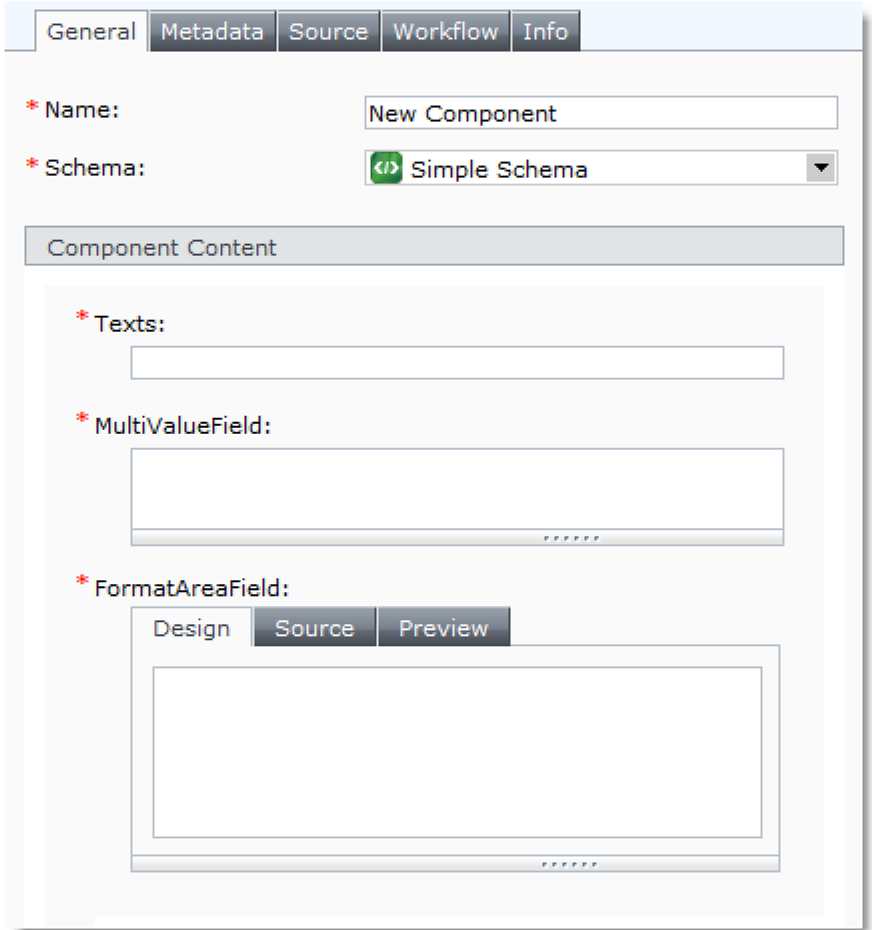
1. Navigate to the Publication and Folder in which you want to create the Component.
2. On the **Home** tab or the **Create** tab of the Ribbon, click **New Component**. A **New Component** window appears:




3. On the **General** tab, modify the following fields:
   - **Name**—fill in the name of the Component
   - **Schema**—select the Schema on which this Component will be based. (If your SDL Tridion system administrator defined a mandatory Schema for the Folder in which you create a Component, then you see no **Schema** field, because the Content Manager already selected the Schema for you.)

   A series of fields appears.
4. Fill in all mandatory fields and optional fields as necessary. Mandatory fields have a red asterisk (*) beside them.

Note: For more information on Component field types, see Component field types (see page 68).




5. A Component may also use Metadata fields. If so, a **Metadata** tab appears. Select the Metadata tab (if applicable) and fill in the mandatory fields and, if applicable, the optional fields.

6. On the **Home** tab of the Ribbon, click **Save and Close**.

7. Depending on the Schema you selected, you may now be prompted to add this Component to a Bundle. You can choose to skip this step, but if you do, the Component remains checked out to you.

8. If this item must be added to a Bundle, a dialog opens asking you if you would like to do so now. You can choose **Not Now** to close the dialog, but you see a warning informing you that your item is not in a Bundle, and the same dialog will appear every time you save changes to the item. Alternatively, if you select **Add**, a Bundle selection dialog appears.

9. In the tree structure on the left, navigate to a Publication and Folder that contains a Bundle to which you want to add the item, and add it to that Bundle by selecting the Bundle and clicking **Add**. This adds the item to the selected Bundle and closes the dialog. If the Bundle is already in workflow, the item will be too. You can also select **Close**, which has the same effect as clicking **Not Now** in the previous dialog.

## Result

You have created a Component.

Note: For information about creating Pages and using Component on Pages, see Pages (see page 105).

## 4.2 Editing a Component

You can edit a Component to modify the content of the Component.

### Requirements

To edit a Component, you must have Component Management rights and Write permissions.

It is not possible to edit a Component if the following conditions apply:

- The Component is shared from another Publication
- A different user already checked out the Component
- The Content Manager assigned the Component to a different user through a Workflow Process

### Steps to execute

1. Navigate to the Publication and Folder that contains the Component you want to edit.
2. To open the Component, select the Component in the list view and click **Open** on the **Home** tab of the Ribbon.
3. Edit the fields in the Component as required. (See Component field types (see page 68) for more information about the different field types).
4. Click **Save and close** in the **Home** tab of the Ribbon.
5. Depending on the Schema you selected, you may now be prompted to add this Component to a Bundle. You can choose to skip this step, but if you do, the Component remains checked out to you.
6. If this item must be added to a Bundle, a dialog opens asking you if you would like to do so now. You can choose **Not Now** to close the dialog, but you see a warning informing you that your item is not in a Bundle, and the same dialog will appear every time you save changes to the item. Alternatively, if you select **Add**, a Bundle selection dialog appears.
7. In the tree structure on the left, navigate to a Publication and Folder that contains a Bundle to which you want to add the item, and add it to that Bundle by selecting the Bundle and clicking **Add**. This adds the item to the selected Bundle and closes the dialog. If the Bundle is already in workflow, the item will be too. You can also select **Close**, which has the same effect as clicking **Not Now** in the previous dialog.

### Result

The Content Manager saves a modified version of the Component. Any of the following items that use the Component will now use the modified version of the Component:

- Pages
- Component Links in other Components
- Child Publications that share from this Publication

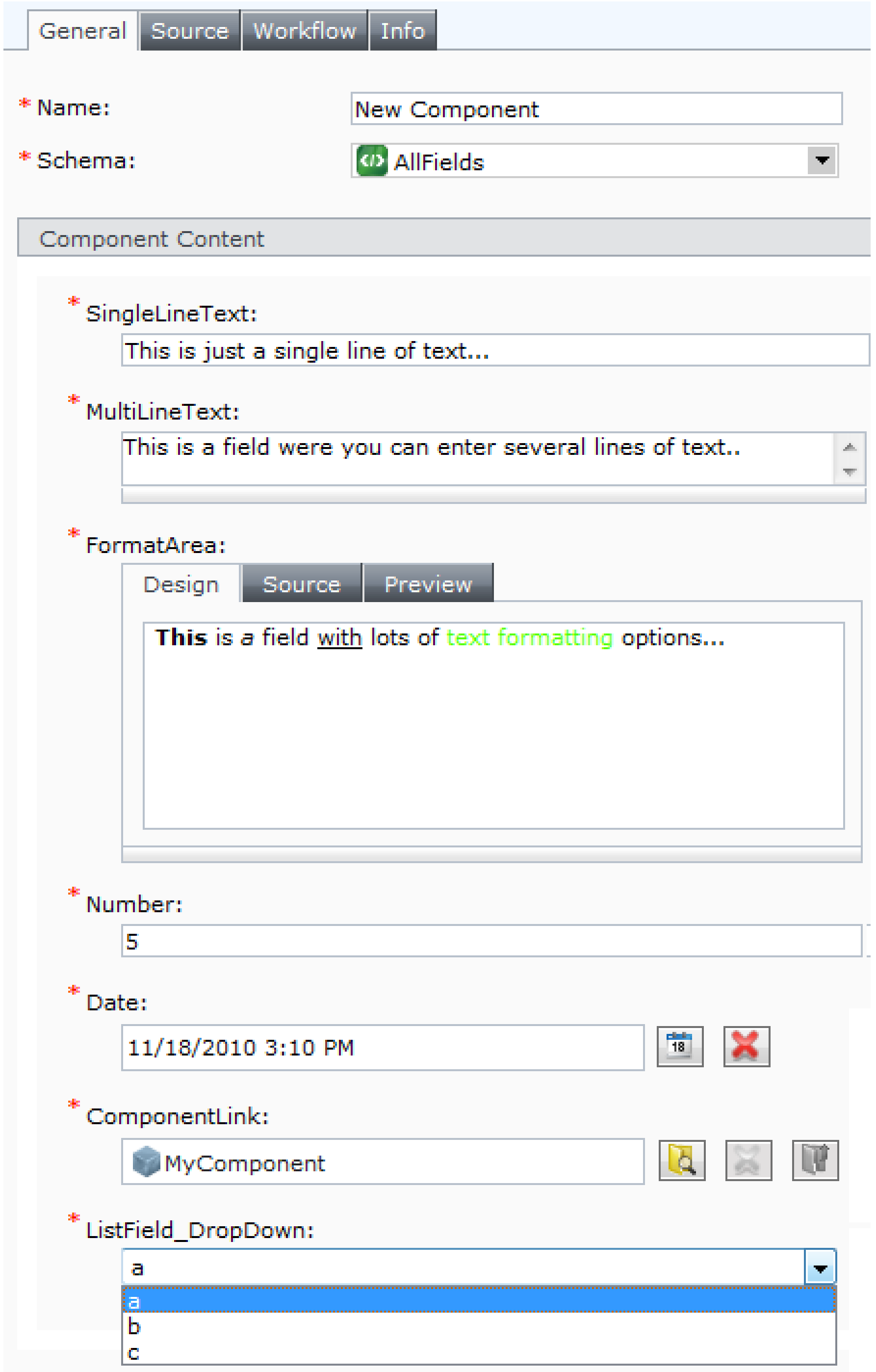
# Chapter 5 Component field types

Components are based on Schemas that define what fields you can define for that Component. The types of fields you need to fill in differ depending on the definition of the Schema.

The following table describes the field types that you may encounter when filling in a Component:

| Field type | Accepted values |
|---|---|
| Text | Alpha-numeric characters |
| Number | Numbers, negative symbol, and one decimal point |
| Date | Date and time |
| External link | External link to any URL address |
| Multimedia link | Link to a multimedia Component |
| Component link | Link to a Component |
| Format area | Alpha-numeric characters and formatting |

The following image displays different field types in a Component:

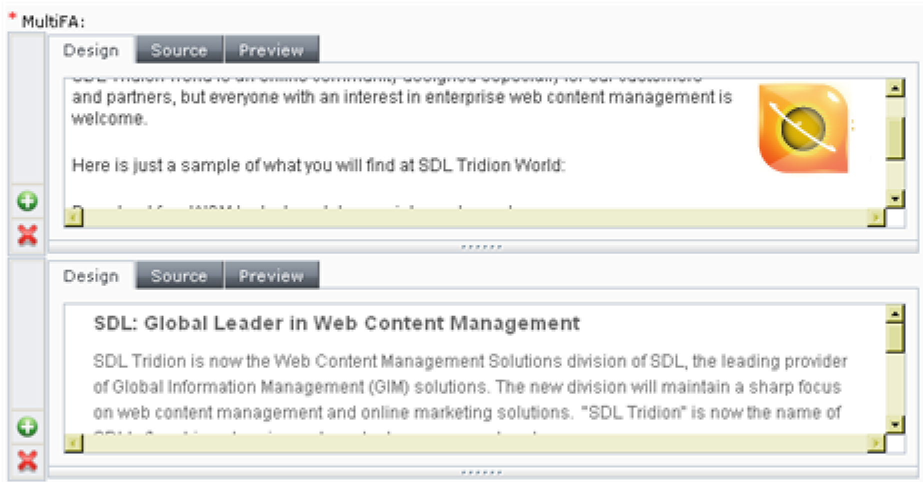



## 5.1 Field characteristics

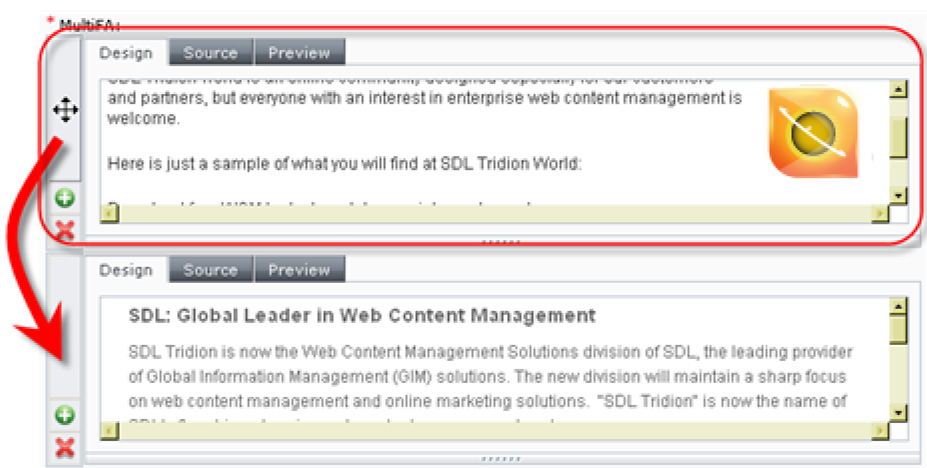
In addition to the general classification of field types (text, number and so on), a field type can have the following characteristics:

In addition to the general classification of field types (text, number and so on), a field type can have the following characteristics:

- The field can be mandatory or optional. Mandatory fields are indicated with a * next to the label of the field.
- You can select values from predefined lists. See also List fields (see page 76).
- Fields may accept one value only or multiple values. Multiple value fields are displayed with two buttons to the left of the field. Use the **Add** button to add an addition value to the field. Use the **Delete** button to delete a value from the field.




- You can reorder the values in multiple-value fields as follows:
  - Place your cursor over the icons to the right of the field. The arrow will turn into a Move icon.
  - Drag and drop the field to another location for the same field.

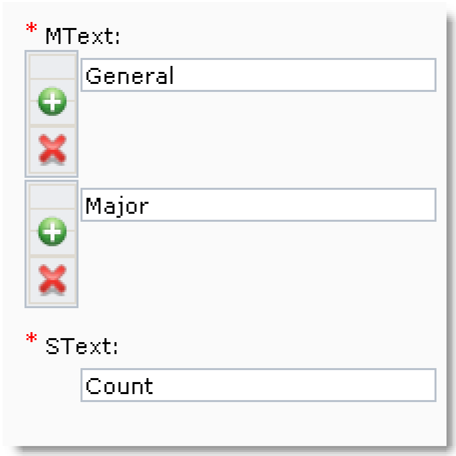



## 5.2 Simple text fields

Simple text fields accept any characters. To fill in these fields, you simply type text into the field.

Text fields may have the following characteristics:

- The field may accept more than one value. This may be used to distinguish between different paragraphs.
- The field may be mandatory. This is indicated with a *.



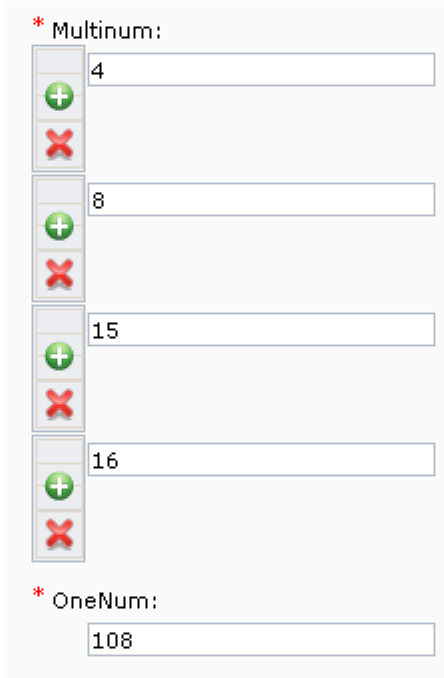

Format areas also allow you to format text. This field type is described in Format area fields (see page 77).

## 5.3 Number fields

Number fields accept one decimal point and a positive or negative sign. Type a number in the field, for example: 100000.00 and -1.23.

A number fields may have the following characteristics:

- The field may accept more than one value. This may be used to create a list or sequence of numbers.
- The field may be mandatory. This is indicated with a *.

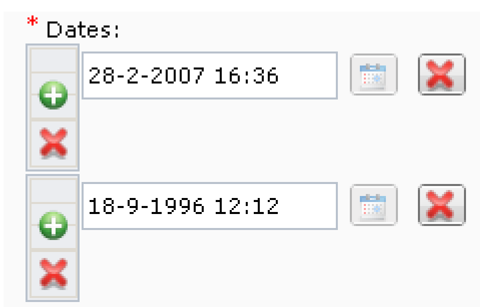



## 5.4 Date fields

A date field allows you to select a date and time using a date select button.

Date fields may have the following characteristics:

- The field may accept more than one value. This may be used to create a list of dates.
- The field may be mandatory. This is indicated with a *.



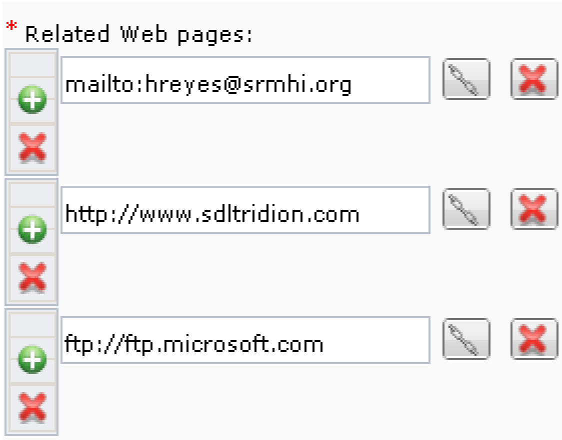

## 5.5 External link fields

An external link field allows you to create a link to an external URL, an e-mail address or another URL addressable type such as FTP.

### Context

External link fields may have the following characteristics:

- The field may accept more than one value.
- The field may be mandatory—this is indicated with a *.




## Steps to execute

1. Click the **Add** button to the left of the link field. A **Hyperlink** window opens.

2. In the **Type** field, select one of the following options:
   - Select **http://** to create a hyperlink to a Web page.
   - Select **mailto**: to create a link to an e-mail address.
   - Select **Other** to create a link to another type of internet resource such as an HTTPS, FTP or other resource.

3. In the **URL** field, do one of the following:
   - If you are creating a link to a Web page, paste or type the URL of the page you want to link to.
   - If you are creating a link to an e-mail address, type the e-mail address that you want the visitor to send mail to, after the `mailto:` prefix.
   - If you are creating a link to another type of internet resource, type the address of the internet resource that you want to link to.

4. Click **OK**.

5. If the field specifies more than one link, you can use the area to the left of the link field to further format the links for this field:
   - Drag-and-drop — hold your mouse down over a value and drag to move the value to another position
   - **Add** button — insert another link
   - **Remove** button — remove the current link

# 5.6 Multimedia link fields and Component link fields

Multimedia links allow you to create one or more links to Multimedia Components and Component links allow you to create one or more links to Components and you may also be able to link to multimedia Components.

## Context

You can add a link to Components within the same Publication as the Component that you are creating. If a link field accepts more than one value, it is also possible to:

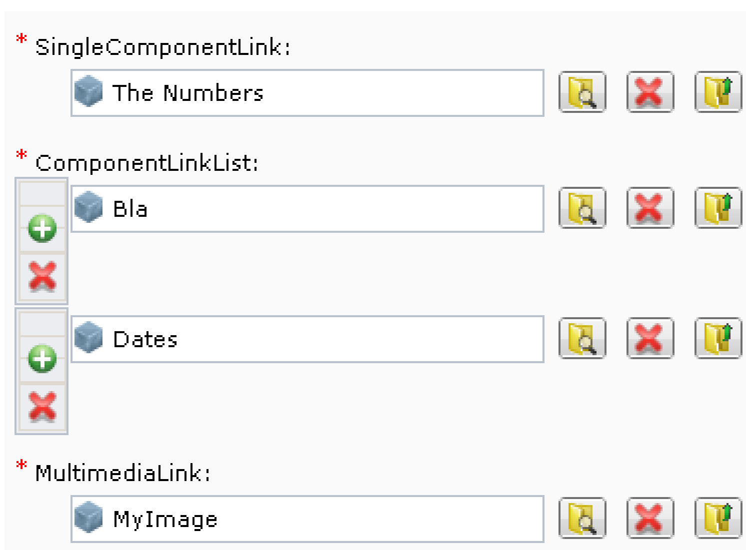
- change the order of links by dragging and dropping fields
- remove links from a list of existing links using the **Delete** button

Note: The items you want to link to must exist before they can be added as links.

## Steps to execute

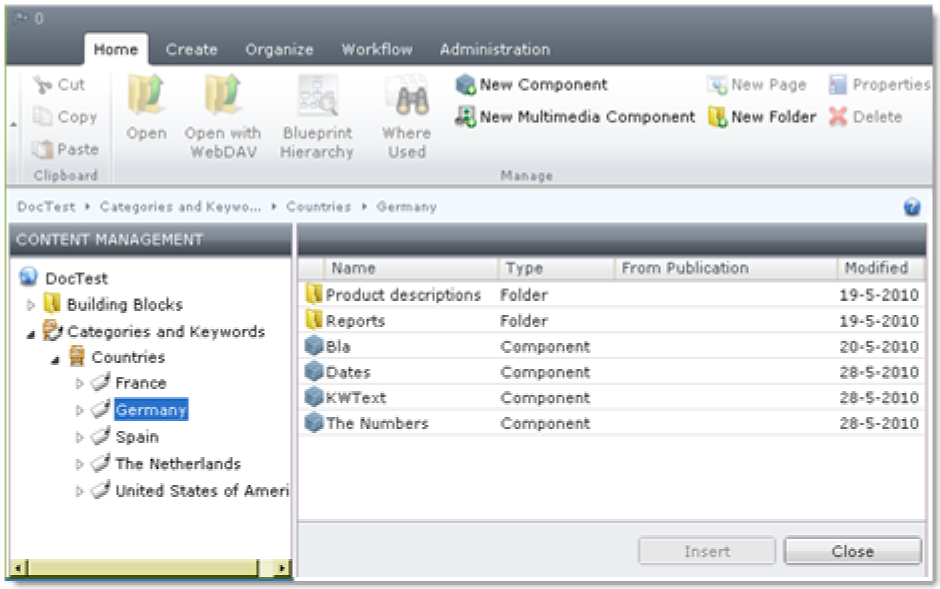
1. In the Component you are creating or editing, click the **Insert** button next to the link field.

   Depending on how they have been defined by the Component Schema, Component Link fields may contain a single link or multiple links. The following image shows how these fields are displayed:




2. In the window that appears, you can select a Component to link to in one of the following ways:

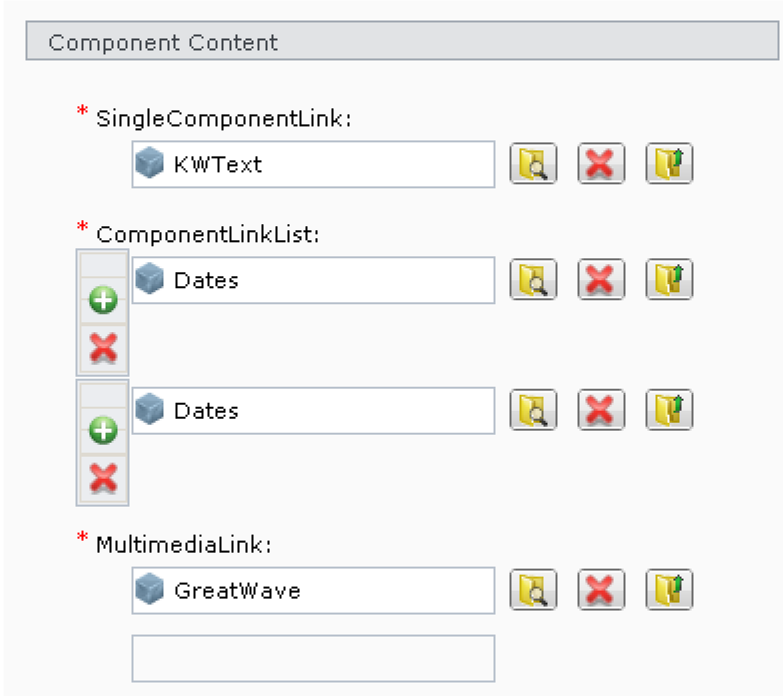
- In your **Building Blocks** Folder structure, navigate to the location of the Component or Multimedia Component for which you want to create a link. The List View displays Components filtered based on the allowed Schema (or Schemas).
- In your **Categories and Keywords**, select a Keyword. The List View displays Components that have been classified with this Keyword, or a child Keyword, and filtered based on the allowed Schema (or Schemas).




3. Select a Component and click **Insert**. The dialog closes and you have added a link to the Component you selected.

4. If the field specifies more than one link, you can use the area to the left of the link to further format the links for this field:

   - Drag a field and drop it in another location to move a link to a new position.
   - **Insert** button — insert a new link
   - **Remove** button — remove a link




### Result

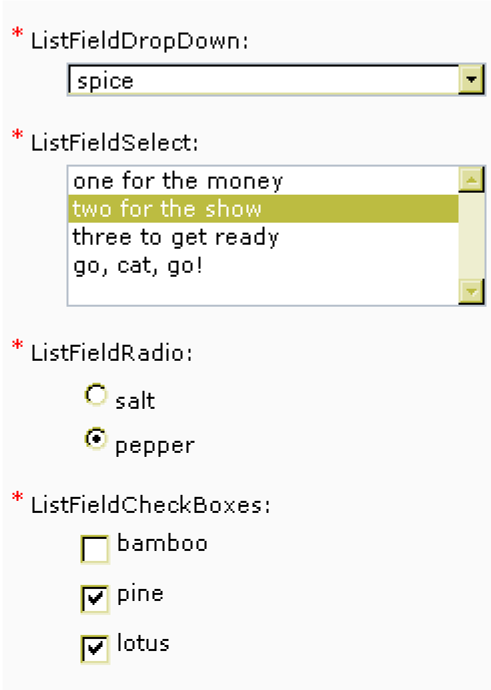
The Content Manager creates a Component link or a multimedia link.

## 5.7 List fields

Components may contain drop-down lists, select boxes, radio buttons, check-boxes, and trees as list field types.

Depending upon the list field, you may be able to select text, numbers, or date values:

- drop-down lists—you can select one option from a drop-down list
- select boxes—you can select one or more options from a drop-down list
- radio buttons—you can select one option
- check-boxes—you can select one or more check-boxes
- tree—you can select one or more Keywords in a taxonomy tree




## 5.8 Format area fields

Format areas accept alpha-numeric characters and also allow you to apply formatting to the field.

The formatting options available for the field appear in the **Format** tab of the Ribbon of the Component dialog (this tab is automatically displayed when you select the field). In addition, you may also edit the HTML. The HTML edit setting is configurable, therefore you may not be able to edit HTML source in all format areas.

Format areas may consist of three tabs:

- **Design** tab—when entering text in the text area on this tab, you can use the controls on the toolbar. These controls are described in the remainder of this chapter.
- **Source** tab—you can enter text and HTML formatting on this tab. If you try to switch to the Design or Preview tabs, and if you try to Save or Save & Close the Component, Content Manager Explorer validates the HTML and aborts if the HTML contains any errors.

  Note: Content Manager Explorer allows the tab switch or save if the validation yields only validation warnings. To explicitly check for warnings, use the **Validate** button in the toolbar.
- **Preview** tab—you can view content that you have entered into this field in view-only mode. In addition, you can disable styles in order to view the text without any styles. By default, this check-box is selected.

The following image shows the **Design** tab:


The following image shows the **Source** tab:


The following image shows the **Preview** tab:


The **Format** tab of the Component Ribbon displays format options for a format area. When entering content into a format area, you can use the available options.

A format area fields may have the following characteristics:

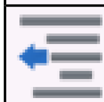
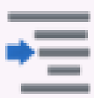
- The field may accept more than one value. This may be used to distinguish between different paragraphs.
- The field may be mandatory. This is indicated with a *.

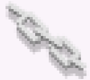
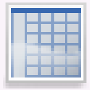
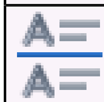
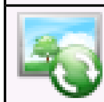
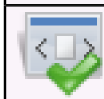
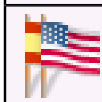
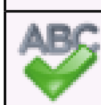
## 5.8.1 Format area field controls

The following table describes the formatting options that may be available when entering content in a format area field.

Note: Not all of the options described in the table are available in all format areas.

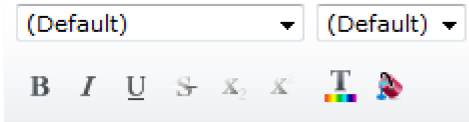
| Icon | Name | Description |
|---|---|---|
| | Cut | Cut copies content to your clipboard and removes the content from the Component. To cut text:<br>• Select the text you want to move.<br>• Click Cut. |
| | Copy | Copies content to your clipboard. To copy content:<br>• Select content you want to copy.<br>• Click Copy. |
| | Paste | Places content from your clipboard to the location of your cursor in the Component. To paste content:<br>• Place your cursor where you would like the cut or copied content to appear.<br>• Click Paste.<br>Note that your browser may not grant you the authorization to perform this action.<br>Click on the lower half of the button to see the following suboptions:<br>**Paste**<br>Pastes content including formatting.<br>**Paste Special**<br>Reveals a number of paste options:<br>• **Remove non-HTML markup** removes only non-HTML markup<br>• **Remove Unknown Class Names** removes class attributes that are not defined in the configuration file<br>• **Remove All Styles** removes style and class attributes that are not known<br>• **Paste as Text** removes all markup and non-textual content and pastes plain text.<br>Select **Use as default** option to continue to use this setting, but only for the duration of your current editing session. You can then use the **Paste** button to reapply the setting you have selected. |
| | Undo | Undoes the last change made. You can undo the following types of changes:<br>• cut/copy/paste<br>• typed or deleted characters<br>• formatting changes<br>• XHTML conversion<br>To undo changes, click Undo. |

| Icon | Name | Description |
|---|---|---|
|  | Redo | Reapplies the action from the last undo. You can redo the same changes as listed for Undo. To redo changes, click Redo. |
|  | Bold | Applies bold, italic or underline formatting to selected text. To apply bold, italic, or underline formatting, either select the text to which you want to apply formatting or place your cursor in the paragraph in which you would like to apply formatting and click the bold, italic, or underline button. |
| <br><br> | Left align<br>Center<br>Right align | Use these buttons to apply alignment formatting to text. To align text, Place your cursor in the paragraph to which you want to apply alignment and click Left align, Center or Right align |
| <br> | Bullets<br>Numbering | Use these buttons to create lists. To create a list, place your cursor in the paragraph to which you want to apply list formatting and click the Bullets button to create a bulleted list or the Numbers button to create a numbered list. |
| <br> | Decrease Indent<br>Increase Indent | Changes the indent of a paragraph. To change the indent of a paragraph, place your cursor in the paragraph that you want to indent and click the Increase Indent button or Decrease Indent button. |
|  | Insert Character | Inserts special characters into text. Special characters include copyright (©), trademark (™), Euro signs (€) and other unique characters. You may also use this feature to insert standard text, for example, names of products and so on. Available characters depend upon your system configuration. To insert a special character:<br>• Place your cursor where you would like the special text to appear.<br>• Click the Special Character button.<br>• Select a character from the list and click OK. |
|  | Anchor | Creates an anchor to which you can link within the same format area. To create an anchor:<br>• Place your cursor in the location at which you would like to create an anchor.<br>• Click the Insert Anchor button.<br>• In the window that appears type the name of the anchor and click OK. |

| Icon | Name | Description |
|---|---|---|
| | | You can now create a hyperlink to this anchor using the Hyperlink button. |
|  | Hyperlink | Creates hyperlinks to Components, HTTP pages, e-mail addresses, anchors, or other resources. See Inserting hyperlinks in a format area (see page 83). |
|  | Table | See Formatting tables in a Format Area (see page 87). |
|  | Image | See Inserting an image in a format area (see page 86). |
|  | Horizontal line | Inserts a horizontal line. To insert a horizontal line, place your cursor in the position in which you would like to insert a horizontal line and click the Horizontal Line button. |
|  | Load images | By default, when you open a Component that contains an image, a placeholder is displayed. Click the Load images button to view images. |
|  | Validate | The validate button converts the content of the format area into XHTML and validates the content according to accessibility standards. If the format area contains any errors, warnings or accessibility messages, the messages are shown in a dialog that gives you one of two options:<br>• You can correct the errors manually.<br>• You can allow the Content Manager to create valid markup. |
|  | Language | Sets a language attribute for selected text. Select the text for which you would like to set a language attribute and click the Language button. In the Language pop-up that appears, select a language from the displayed list. |
|  | Abbreviation | Defines the full or expanded form of a selected abbreviated expression or acronym. A description is inserted as a tool tip. To insert an abbreviated expression or acronym:<br>• Select the text for which you would like to define an abbreviation or acronym.<br>• Click the Abbreviation button.<br>• In the popup that opens, fill in the following fields:<br>    • Type—select abbreviation or acronym<br>    • Text—type the text that you would like to appear in the format area<br>    • Description—type the description you would like to appear as a pop-up |
|  | Spell-check | This options will spell check the entire Component. |

The following controls are not icons:

### Font selection

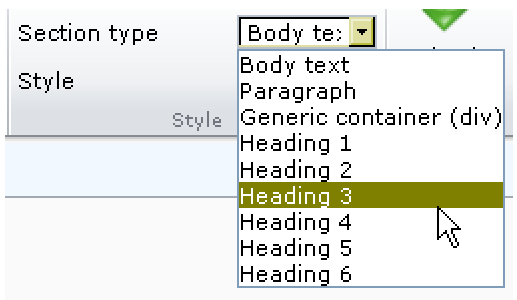



See Selecting fonts in a format area (see page 87).

### Current elements


The "Current Elements" drop-down contains the currently selected element and previous elements. You can use this to select any element and view its properties. If an element has an associated style or class attributes, these elements are displayed with an asterisk character. The formatting options on the toolbar display the options available for the currently selected element.

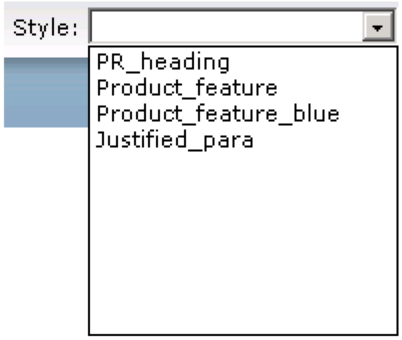
### Section type




You can apply a header level to text within a format area. To apply a header level to text, place your cursor in the line that you want to add a header level to and select an option from the Header selection list:

- Paragraph—<p>
- Generic container—<div>
- Body text—no surround tag
- Headings—<h1> - <h6>

### Style




If defined, you can apply a Style to a current selection. The Styles define predefined formatting. These styles are predefined for the entire system. To apply a style to text:

- Select the element to which you want to apply a style.
- Select the style from the Style drop-down.

For more information about configuring styles for text, refer to the implementer's documentation portal.

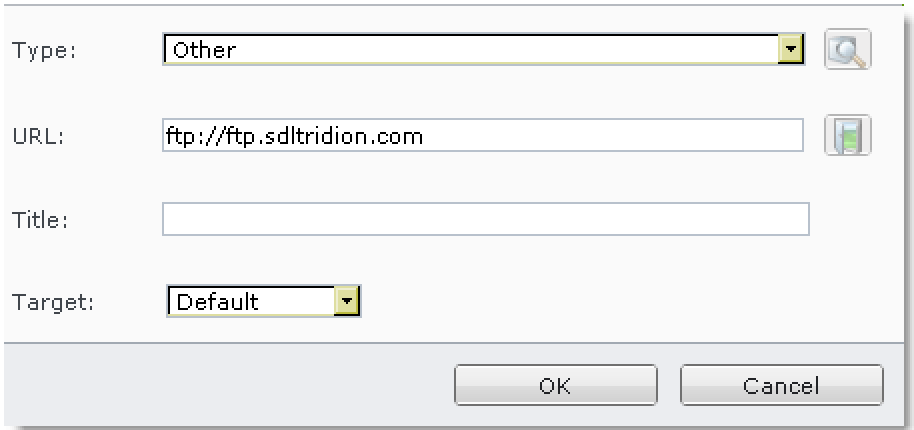
### 5.8.2 Inserting hyperlinks in a format area

In a format area, you can create the hyperlinks to the items: Components, HTTP, E-mail address, Anchor, and Other.

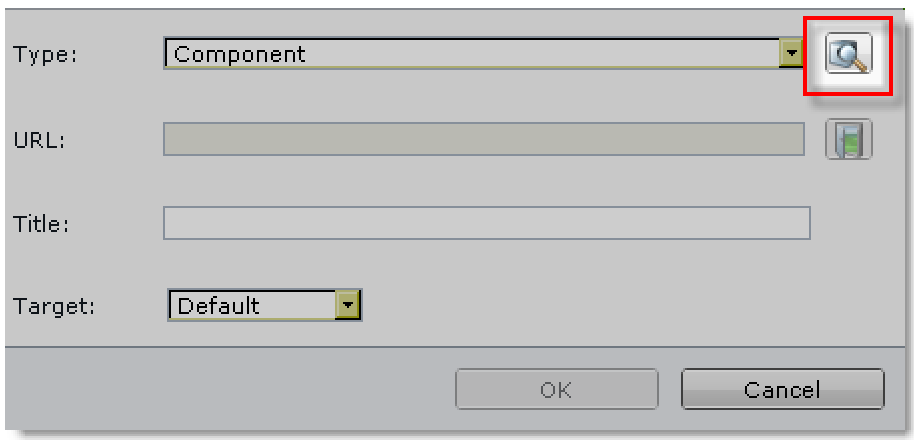
#### Context

#### Steps to execute

1. To create a hyperlink, select the text that you want to display as a hyperlink.
2. Click Insert Hyperlink on the toolbar. A Hyperlink window opens.
3. In the **Type** field, select one the following options:
   - Select `Component` to create a Component hyperlink.
   - Select `HTTP://` to create a hyperlink to an HTTP resource.
   - Select `mailto:` to create a link to an e-mail address.
   - Select `Anchor` to create a link to an anchor within the same format area.
   - Select `Other` to create a link to another type of internet resource.



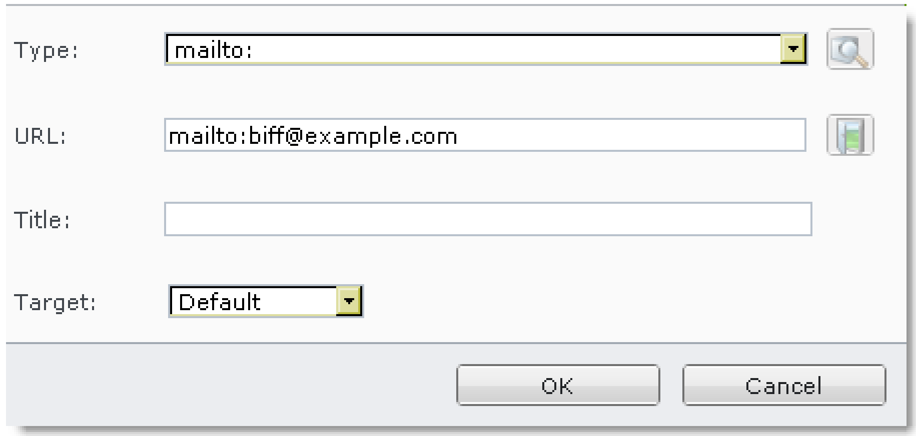

4. In the **URL** field, do one of the following:
    - To create a link to a Component, click the **Browse To** button, and select the Component that you want to link to.



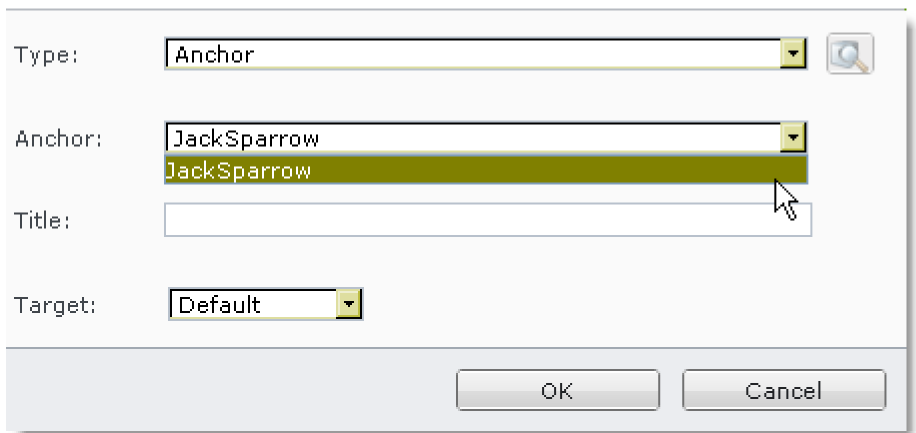

    - To create a link to an HTTP accessible resource, type the URL of the resource you want to link to.


Note: Do not use this option if you want to link to a different kind of resource such as an FTP, mail or other resource. The URL must begin with HTTP.

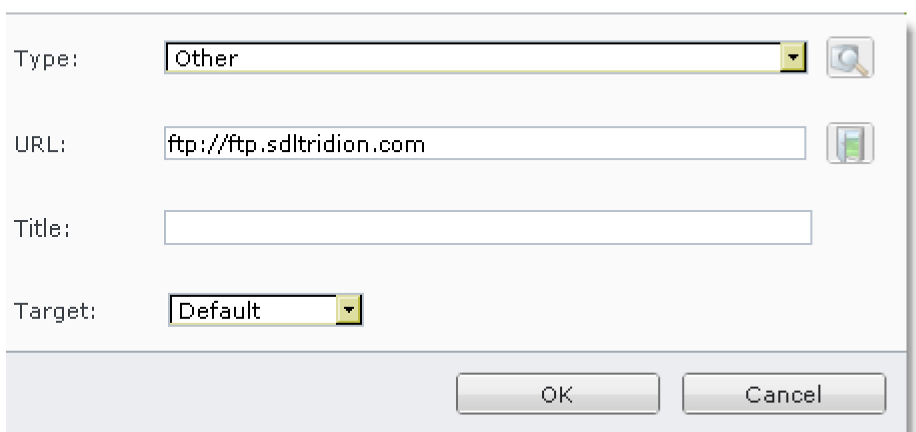
- To create a link to an e-mail address, type the e-mail address that you want the visitor to send mail to.




- To create a link to an anchor, select the name of the anchor that you want to link to.




- To create a link to another type of internet resource, type the address of the internet resource that you want to link to.




5. (Optional) In the **Title** field, describe the contents of the link. When published this text is rendered as a tooltip by most browsers.

6. (Optional) Target — Target controls where the new document will be displayed when the user follows a link. By default, clicking on a link simply loads a new document in the same window where the link was. Target allows you to specify the following options:
    - **New window**—the link will open in a new window.
    - **Same frame**—the link will open within the same frame as the link tag.
    - **Parent frame**—the link will load in the immediate Parent of the frame.
    - **Top frame**—the link will load in the top frame of the window.
    - **Named**—the name of the target window. If you select named, you must also provide the name of the target window.

### 5.8.3 Inserting an image in a format area

You can insert a Multimedia Component that is an image file into a format area.

#### Context

#### Steps to execute

1. To insert an image into a format area, in the format area, insert your cursor in the location in which you would like the image to appear.

2. Click **Image** button in the **Format** tab of the Component Ribbon.

3. In the dialog that opens, click the **Browse** button.

    A browse dialog opens.

4. Navigate to the folder containing the image you wish to insert, select it and click **OK** to return to the **Image** dialog.

    The **Image** dialog shows the selected image.

5. In the **Image** window dialog, click **Advanced** to expand the dialog and show advanced options. In the expanded area, fill in the following fields:
    - **Text**—(optional) type the tooltip text that will appear when a visitor places their cursor over image.
    - **Description URL** —(optional) type the URL of a Web page that describes this image.
    - **Width**—(optional) enter the desired display width of the image
    - **Height**—(optional) enter the desired display height of the image
    - **Proportion**—(optional) if you do not want the image to be rendered using the width and height proportions, uncheck this box before you modify the width and height of the image.

6. Click **OK** to close the **Image** dialog.

7. By default, images are shown with a placeholder in the format area. You can view images in the format area using the **Load Images** button. To view images in the format area:

a. Place your cursor in the format area in which you want to view images.

b. From the **Format** tab of the Ribbon, select **Load images**.

Images are now displayed in this Format Area.

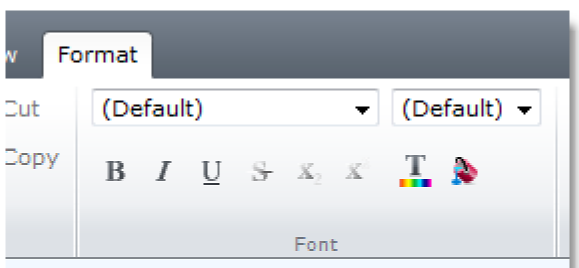
## 5.8.4 Selecting fonts in a format area

You can specify how you want text to appear by selecting options in the **Font** dialog box.

### Steps to execute

1. To select font properties, do one of the following:
   - select the text to which you want to apply text formatting
   - place your cursor in the paragraph in which you would like to apply formatting

2. In the **Font** selection area, you can select the following properties:




- **Font**— the font face
- **Size**—the size of the font
- **Color**—the color of the text
- **Background**—the color of the background
- **Style**—italic, bold, and underline
- **Effects**—strikethrough, superscript, and subscript

Note: The superscript and subscript effects are mutually exclusive. You may only select one of the two.

# 5.9 Formatting tables in a Format Area

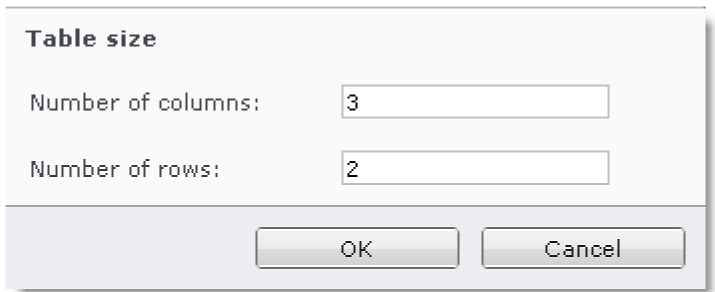
You can create and format tables in format areas.

### 5.9.1 Inserting a table in a format area

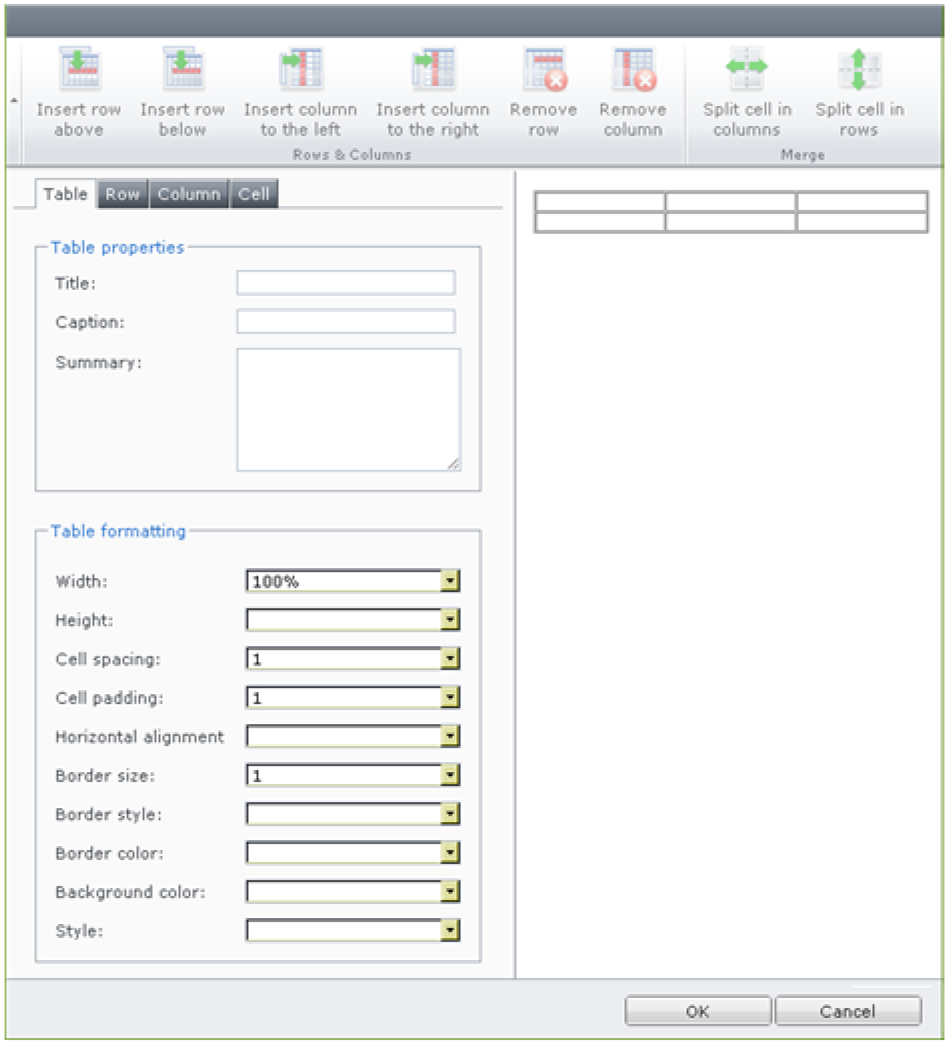
When editing or creating a Component, you can insert tables in format areas. (You can identify a format area by the **Design**, **Source**, and **Preview** tabs that appear above the field.)

#### Steps to execute

1. To insert a table in a format area, in the format area of the Component, place your cursor at the location in which you wish to insert the table.
2. In the **Format** tab of the Component Ribbon, click **Table**. The **Insert Table** window appears.




3. Enter the number of columns and rows and press **OK**. The **Table Editor** window appears.




4. You can edit the following table characteristics:
    - Table properties and formatting
    - Row formatting
    - Column formatting
    - Cell properties and formatting

Note: See Table properties and formatting (see page 91) for information about each of these options.

5. Click **OK** to insert the table with the selected formatting.

### Result

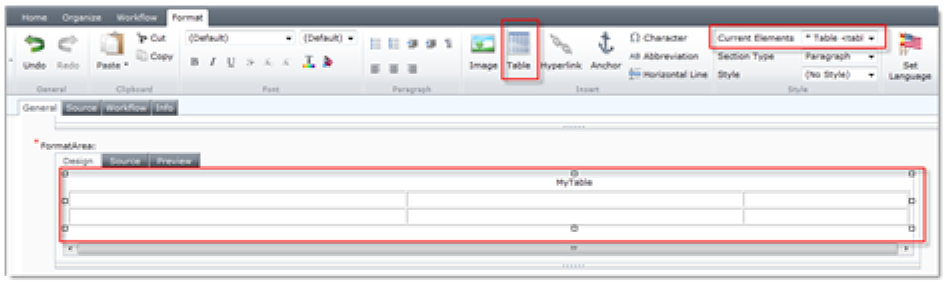
The Content Manager inserts the table in the format area with the selected formatting options.

## 5.9.2 Editing the formatting of an existing table

You can reformat an existing table in the format area of a Component.

## Steps to execute

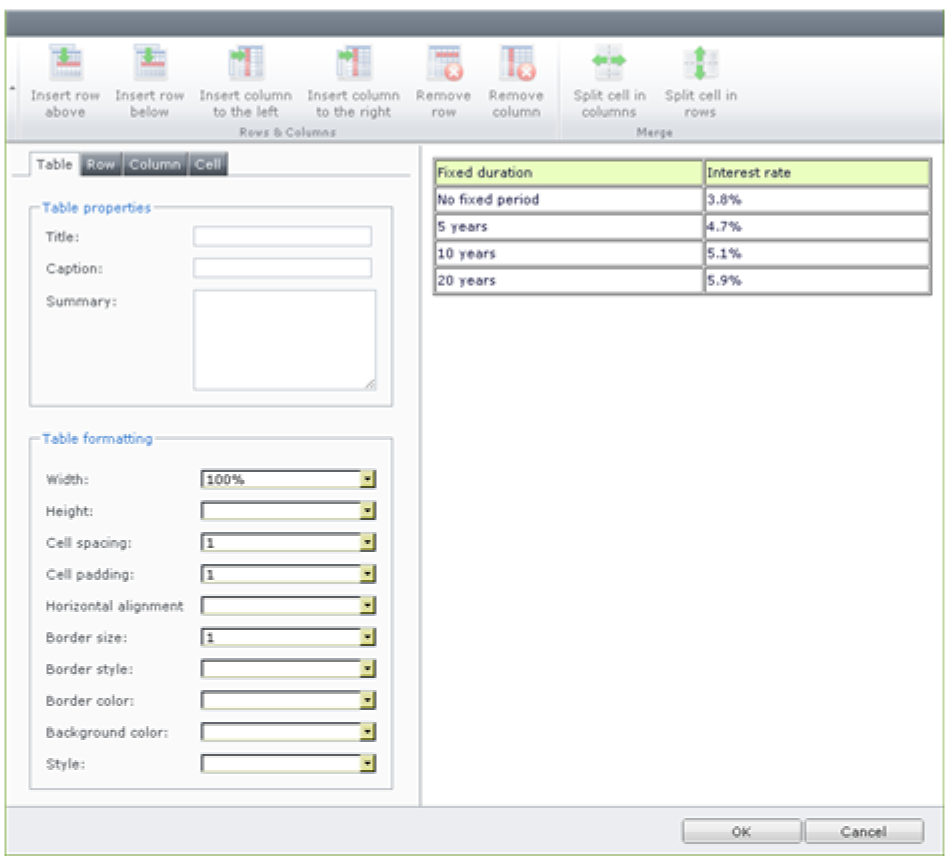
1. To format an existing table, in the format area of a Component, do one of the following:
    - Click on the border of the table you want to format. (In Firefox, this operation may not work.)
    - Select the `table` element from the Current Elements dropdown.




2. On the **Format** tab of the Component Ribbon, click **Table**.

    The **Table Editor** opens.

3. Format the table, row, column and cell options. See Table properties and formatting (see page 91) for more information about these options.

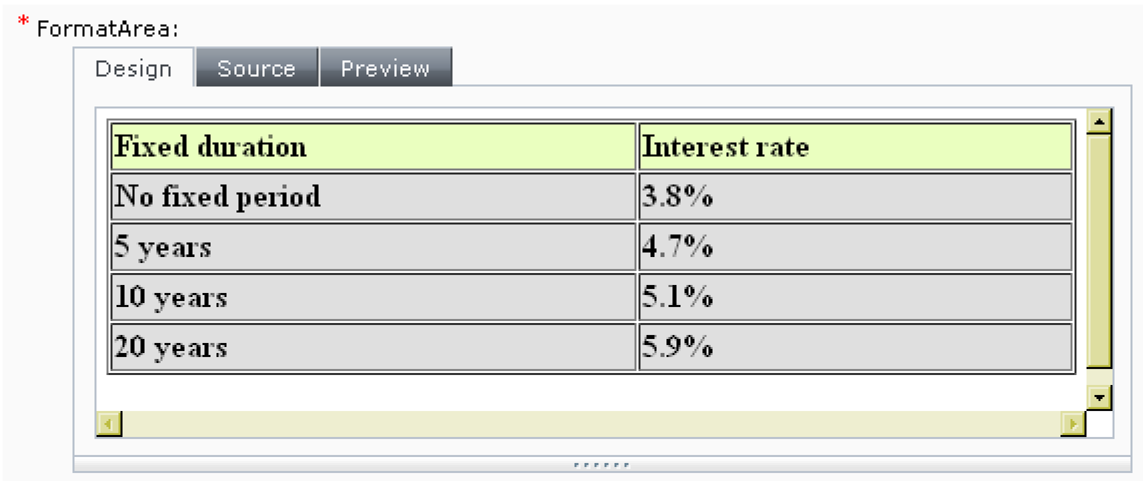


4. Click **OK** to update the table formatting.

## 5.9.3 Adding content to a table

After you have added a table, you can add content to the table in the format area, and can format the content using the formatting options available in the Component toolbar. To move between cells in the table, use the arrow keys on your keyboard: up, down, left, right.

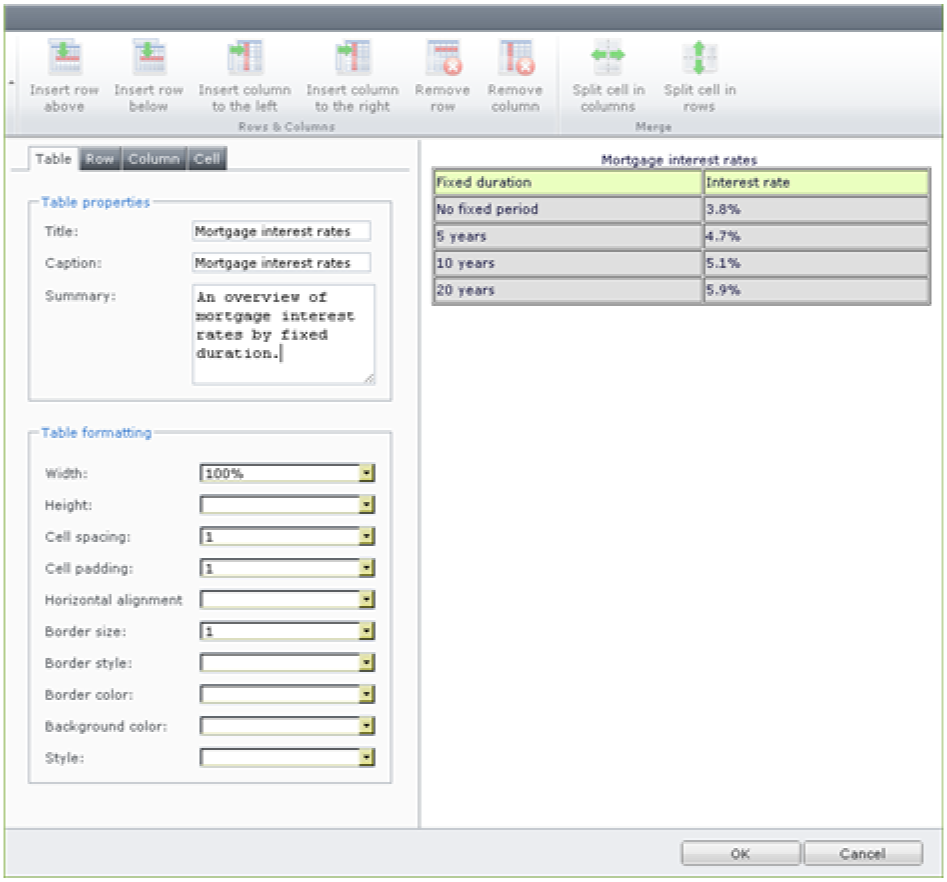
You can also enter text into cells using the **Cell** tab of the **Table Editor**.




## 5.9.4 Table properties and formatting

You can format an entire table using table formatting options.

When you create or edit a table, the Table Editor displays table editing options:




### Title

The text that is shown as a tooltip when the mouse hovers over the table.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

### Caption

The caption displayed above the table.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

### Summary

A longer description of the table.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

### Width

The width of the table, column or cell:

- For a table, this is a percentage (e.g. 60%) of the width of the page. For a column or cell, this is a percentage of the width of the table.

- A specific number of pixels (e.g. 250). To specify a number of pixels, select the Other setting.
- Leave blank for auto sizing.

- **Table:** Yes
- **Row:** No
- **Column:** Yes
- **Cell:** Yes

**Height**

The height of the table, row, or cell:

- For a table, this is a percentage of the format area (e.g. 60%). For a row, or cell, this is a percentage of the table
- A specific number of pixels (e.g. 250). To specify a number of pixels, select the Other setting.
- Leave blank for auto sizing. If you leave this field blank, your browser will adjust the height to the contents of the cell/table.

- **Table:** Yes
- **Row:** No
- **Column:** Yes
- **Cell:** Yes

**Cell spacing**

The spacing around the table cells.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

**Cell padding**

The padding between cell contents and cell borders.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

**Horizontal alignment**

This is the alignment of the contents of cells in the table (left, right, center)

- **Table:** Yes
- **Row:** Yes
- **Column:** Yes
- **Cell:** Yes

**Border size**

The size of the table border. To remove the table border, set the size to "0".

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

**Border style**

The style of the table border.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

### Border color

The color of the border. Select Custom color to select a color other than the listed colors.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

### Background color

The background color of the table, row, column or cell. Select Custom color to select a color other than the listed colors.

- **Table:** Yes
- **Row:** Yes
- **Column:** Yes
- **Cell:** Yes

### Style

If the SDL Tridion system administrator has predefined styles for your system, you can select a predefined style for the table, row, column or cell.

- **Table:** Yes
- **Row:** No
- **Column:** No
- **Cell:** No

### Body/Header/Footer

This is a row setting that allows you to apply a body, header or footer setting to a row in the table.

- **Table:** No
- **Row:** Yes
- **Column:** No
- **Cell:** No

### Vertical alignment

The vertical alignment of the contents of a column, row, or cell (top, middle, bottom).

- **Table:** No
- **Row:** Yes
- **Column:** Yes
- **Cell:** Yes

### Type of information

Select the type of information contained in the selected cell(s):

- Header is for heading text
- Data is for content

- **Table:** No
- **Row:** No
- **Column:** No

- **Cell:** Yes

**ID**

If the Type of information is "Header" you can add an ID attribute to a single selected cell.

- **Table:** No
- **Row:** No
- **Column:** No
- **Cell:** Yes

**Text**

The text contained in a single selected cell.

- **Table:** No
- **Row:** No
- **Column:** No
- **Cell:** Yes

**Abbreviation**

If the Type of information is "Header" you can add an abbreviation attribute to a single selected cell.

- **Table:** No
- **Row:** No
- **Column:** No
- **Cell:** Yes

**Scope**

If the Type of information is "Header" for one or more cells you can select whether the header is for a row or for a column.

- **Table:** No
- **Row:** No
- **Column:** No
- **Cell:** Yes

**Axis**

If the Type of information is "Header" for one or more cells you can categorize cell information.

- **Table:** No
- **Row:** No
- **Column:** No
- **Cell:** Yes

### 5.9.5 Applying formatting to table cells, rows, or columns

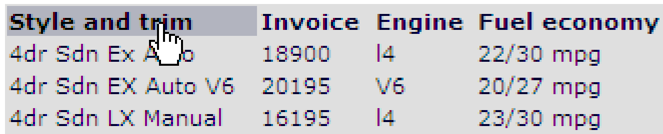
When formatting a table in a format area, you can format specific cells, rows or columns. In the Table Editor, you can select or deselect one or more cells in the table preview area. You can then apply the table formatting options that are available for the selected cells, rows, or columns.

## Context

Select or deselect a single cell, select multiple adjoining cells, or select non-adjoining cells as follows:

**To select a single cell:**

Click on the cell.



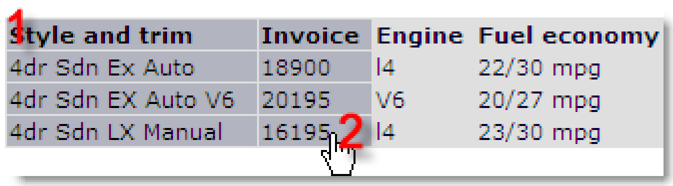
| Style and trim | Invoice | Engine | Fuel economy |
|---|---|---|---|
| 4dr Sdn Ex A[illegible]o | 18900 | I4 | 22/30 mpg |
| 4dr Sdn EX Auto V6 | 20195 | V6 | 20/27 mpg |
| 4dr Sdn LX Manual | 16195 | I4 | 23/30 mpg |

**To select multiple adjoining cells:**

Click on a cell.

Press Shift and click on another cell.

All cells between the first and last cell are selected.



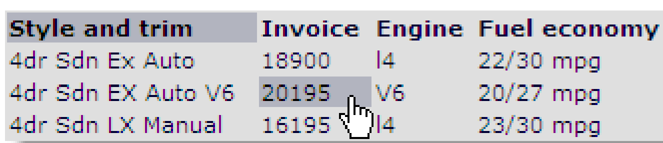
| Style and trim | Invoice | Engine | Fuel economy |
|---|---|---|---|
| 4dr Sdn Ex Auto | 18900 | I4 | 22/30 mpg |
| 4dr Sdn EX Auto V6 | 20195 | V6 | 20/27 mpg |
| 4dr Sdn LX Manual | 16195 | I4 | 23/30 mpg |



**To select multiple, non-adjoining cells**

Click on a cell.

Press Ctrl and click on the other cells you want to select.

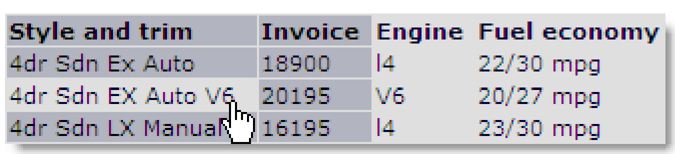


| Style and trim | Invoice | Engine | Fuel economy |
|---|---|---|---|
| 4dr Sdn Ex Auto | 18900 | I4 | 22/30 mpg |
| 4dr Sdn EX Auto V6 | 20195 | V6 | 20/27 mpg |
| 4dr Sdn LX Manual | 16195 | I4 | 23/30 mpg |

**To deselect a single cell**

Press Ctrl.

Click on a cell you wish to deselect.



| Style and trim | Invoice | Engine | Fuel economy |
|---|---|---|---|
| 4dr Sdn Ex Auto | 18900 | I4 | 22/30 mpg |
| 4dr Sdn EX Auto V6 | 20195 | V6 | 20/27 mpg |
| 4dr Sdn LX Manual | 16195 | I4 | 23/30 mpg |

## Steps to execute

1. To format cells in a table, in the Format Area, select the table for which you would like to format table cells. Click the **Table** button on the toolbar.

2. In the Table Editor, select the tab for the type of table properties you want to edit:

- **Table**
- **Row**
- **Column**
- **Cell**

3. Select one or more cells that you want to format as described above.

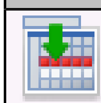
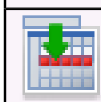
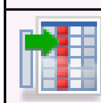
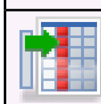
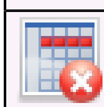
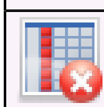
Note: If you have selected the Row or Column tab, the properties you select will be applied to the entire row or column. If you selected the Cell tab, the properties you select will be applied only to the individual cells that you have selected.

4. Select or define the properties of the selected cells, rows, or columns using the options provided in the left-hand pane. For more information about the properties and formatting options available for cells, rows and columns, see Table properties and formatting (see page 91).

5. Click **OK** to apply the changes to your table.

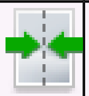
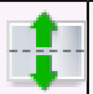
### 5.9.6 Inserting and removing rows and columns from a table

The following table describes how to insert and remove rows and columns from a table.

| Icon | Action | Description |
|---|---|---|
|  | Insert a row above a selected cell | Click on a cell. Click the Insert row above icon. The Content Manager inserts a row above the selected cell. |
|  | Insert a row below a selected cell | Click on a cell. Click the Insert row below icon. The Content Manager inserts a row below the selected cell. |
|  | Insert a column to the left of a selected cell | Click on a cell. Click the Insert column to the left icon. The Content Manager inserts a column to the left of the selected cell. |
|  | Insert a column to the right of a selected cell | Click on a cell. Click the Insert column to the right icon. The Content Manager inserts a column to the right of the selected cell. |
|  | Remove a row | Click on a cell in the row you want to remove. Click the Remove row icon. The Content Manager removes the row and the contents of the row. |
|  | Remove a column | Click on a cell in the column you want to remove. Click the Remove column icon. The Content Manager removes the column and the contents of the column. |

### 5.9.7 Merging and splitting cells in a table

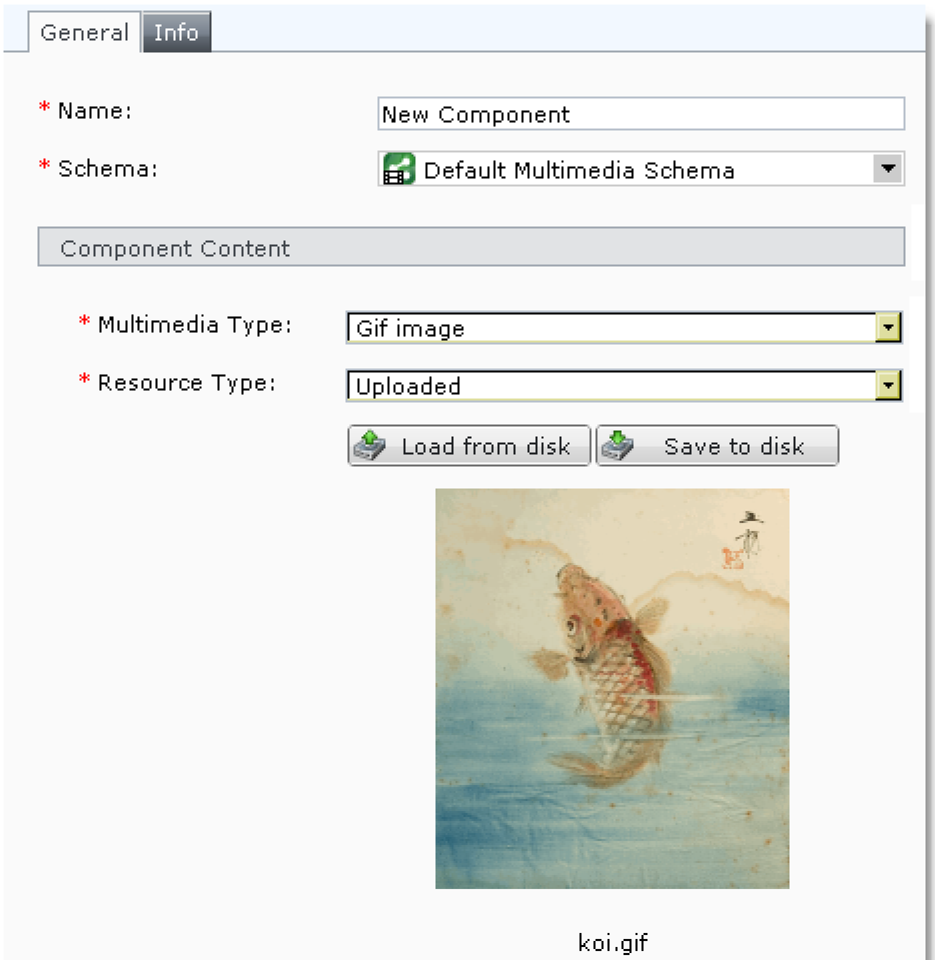
The following table describes how to merge and split cells in a table.

| Icon | Action | Description |
| --- | --- | --- |
|  | Merging cells in a table | In the table preview area, click on a cell you want to merge with another cell. Press the Shift key and select the area of cells you want to merge. Click the Merge cells icon. |
|  | Splitting a cell in a table into columns | In the table preview area, click on a cell you want to split. Click the Split into columns icon. |
|  | Splitting a cell in a table into rows | In the table preview area, click on a cell you want to split. Click the Split into rows icon. |

# Chapter 6 Multimedia Components

Multimedia Components store multimedia information such as images and common file formats such as Microsoft Word documents.

The following image shows a Multimedia Component:




A Multimedia Schema defines the type of binary and other information (metadata associated with the binary).

## 6.1 Default Multimedia Types

By default, Content Manager provides a number of Multimedia Types from which you can create Multimedia Components.

Note: A SDL Tridion system administrator can add additional Multimedia Types to the Content Manager.

| Title | Possible extensions |
|---|---|
| Access Database | mdb |
| PDF Document | pdf |
| Bitmap Image | bmp |
| Plain Text | txt |
| Excel Sheet | xls |
| Png Image | png |
| Executable | exe |
| PowerPoint Presentation | ppt |
| Flash File | swf |
| QuickTime Movie | mov, qt |
| Gif Image | gif |
| Real Player | rm, ram, ra, rv |
| Jpeg Image | jpg, jpeg, jpe |
| Rich Text | rtf |
| MP3 Music | mp3 |
| Sound File | wav |
| Mpeg Video | mpg |
| Word Document | doc |

## 6.2 Creating a Multimedia Component

You create a Multimedia Component by uploading a local or network file to the Content Manager or creating a reference to an external resource, such as an image on your server.

### Requirements

To create a Multimedia Component, you must have Component Management rights and Write permissions for the containing Folder.

Note: Non-ASCII characters in the file name of a Multimedia Component may result in previewing and publishing issues. Therefore, ensure that the filename of the Multimedia file you want to upload or reference does not contain non-ASCII characters.

### Context

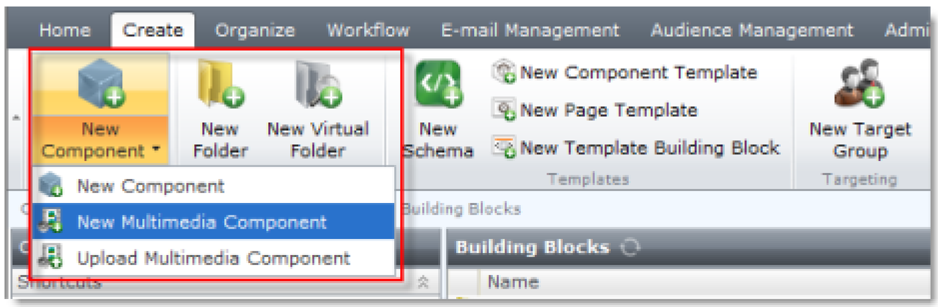
You can create a Multimedia Component that identifies a specific binary file. You can then use the Multimedia Component directly on a Page or as a Component link within another Component. For more information about this, see Multimedia link fields and Component link fields (see page 74).

Important:Certain settings of the Content Manager, such as timeout setting and database size may cause problems when you try to upload very large binary files. If you experience these problems, you may want to consider creating a Multimedia Component that references a binary file that is on your network.

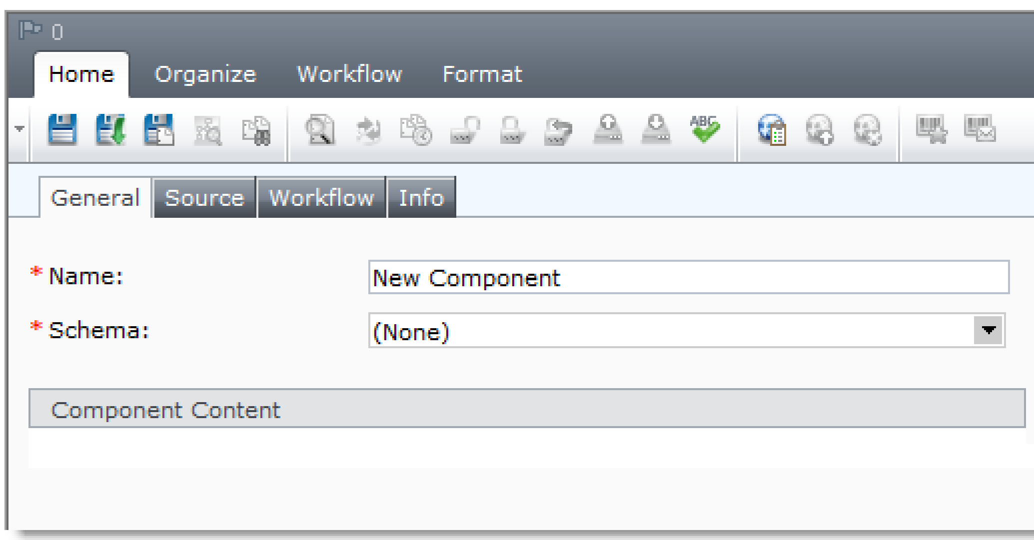
## Steps to execute

1. To create a Multimedia Component, navigate to the Publication and Folder in which you want to create the Multimedia Component.

2. In the **Create** tab of the Ribbon, click **New Component** > **New Multimedia Component** :




A **New Component** window appears:




3. In the **Name** field, type the name of the Component.

4. In the **Schema** field, select a Multimedia Schema. A series of fields appear that you can use to select a multimedia item.

5. In the **Multimedia Type** field, select a multimedia type and do one of the following:
   - Upload a local or network file—go to step 6
   - Reference an external resource—go to step 7

6. To upload a local or network file:

   a. In the **Resource Type** field, select `Uploaded`

   b. Click the **Load From Disk** button.

   c. In the dialog that appears, click the **Browse** button and select the file you want to upload and click **OK**.

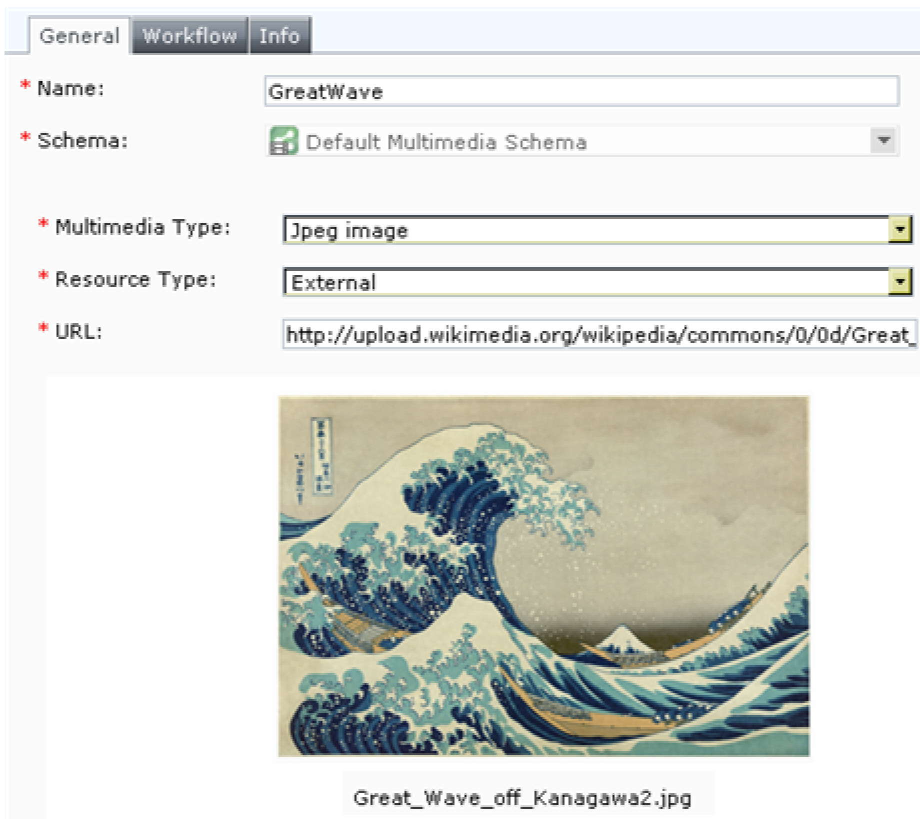
   d. Go to step 8.

7. To reference an external resource:

   a. In the **Resource Type** field, select `External`.

   b. In the **URL address** field that appears, type the URL address of the file you want to use.

   c. Go to step 8.




8. If a **Metadata** tab appears, select the metadata tab and fill in fields as required. You must fill in all mandatory metadata fields before you can save the Multimedia Component.

9. Click **Save and Close**.

10. Depending on the Schema you selected, you may now be prompted to add this Multimedia Component to a Bundle so that it can enter workflow. You can choose to skip this step, but until you add it to a Bundle, your changes will not be checked in.

11. If this item must be added to a Bundle, a dialog opens asking you if you would like to do so now. You can choose **Not Now** to close the dialog, but you see a warning informing you that your item is not in a Bundle, and the same dialog will appear every time you save changes to the item. Alternatively, if you select **Add**, a Bundle selection dialog appears.

12. In the tree structure on the left, navigate to a Publication and Folder that contains a Bundle to which you want to add the item, and add it to that Bundle by selecting the Bundle and clicking **Add**. This adds the item to the selected Bundle and closes the dialog. If the Bundle is already in workflow, the item will be too. You can also select **Close**, which has the same effect as clicking **Not Now** in the previous dialog.

### Result

You have created a Multimedia Component

## 6.3 Editing a Multimedia Component

You can edit a Multimedia Component to modify the name of the Component, to change the multimedia type, or to modify any associated metadata.

### Requirements

- To edit a Multimedia Component, you must have Component Management rights, and write permissions for the containing Folder.
- In a BluePrint, the Multimedia Component must be a local item or a local copy.

### Steps to execute

1. To edit a Multimedia Component, navigate to the Folder that contains the Multimedia Component you want to edit.

2. Select the Multimedia Component and click **Open** on the **Home** tab of the Ribbon. Content Manager Explorer displays the properties of the Multimedia Component in a dialog.

3. As required, edit the following fields on the **General** tab:

   - **Name** — The name of the Multimedia Component must be unique within the Folder in which you create it. In a BluePrint, this naming constraint extends to any Parent or Child Publications in the BluePrint.

     Note: Non-ASCII characters in the file name of a Multimedia Component may result in previewing and publishing issues. Therefore, ensure that the filename of the Multimedia file you want to upload or reference does not contain non-ASCII characters.

- **Schema** — You must base the Component on a Multimedia Schema. If the Folder in which you create the Component has a mandatory linked Schema, the Content Manager selects the Schema automatically, and the Component must use it.
- **Multimedia type** — The type of binary file that you will store in this Multimedia Component.
- **Resource type** — You can either Upload the binary file or you can supply an External URL.

4. If the **Metadata** tab appears, you may see metadata fields, which you can modify if you wish. If any mandatory metadata fields exist, you must fill in these fields before you can save the Multimedia Component.

5. Click **Save and Close**.

6. Depending on the Schema you selected, you may now be prompted to add this Multimedia Component to a Bundle so that it can enter workflow. You can choose to skip this step, but until you add it to a Bundle, your changes will not be checked in.

7. If this item must be added to a Bundle, a dialog opens asking you if you would like to do so now. You can choose **Not Now** to close the dialog, but you see a warning informing you that your item is not in a Bundle, and the same dialog will appear every time you save changes to the item. Alternatively, if you select **Add**, a Bundle selection dialog appears.

8. In the tree structure on the left, navigate to a Publication and Folder that contains a Bundle to which you want to add the item, and add it to that Bundle by selecting the Bundle and clicking **Add**. This adds the item to the selected Bundle and closes the dialog. If the Bundle is already in workflow, the item will be too. You can also select **Close**, which has the same effect as clicking **Not Now** in the previous dialog.

### Result

The Content Manager saves a modified version of the Multimedia Component. If the Content Manager checks in the Multimedia Component, any Pages or Components that use the Multimedia Component will now use the new version.

## 6.4 Viewing the contents of a Multimedia Component

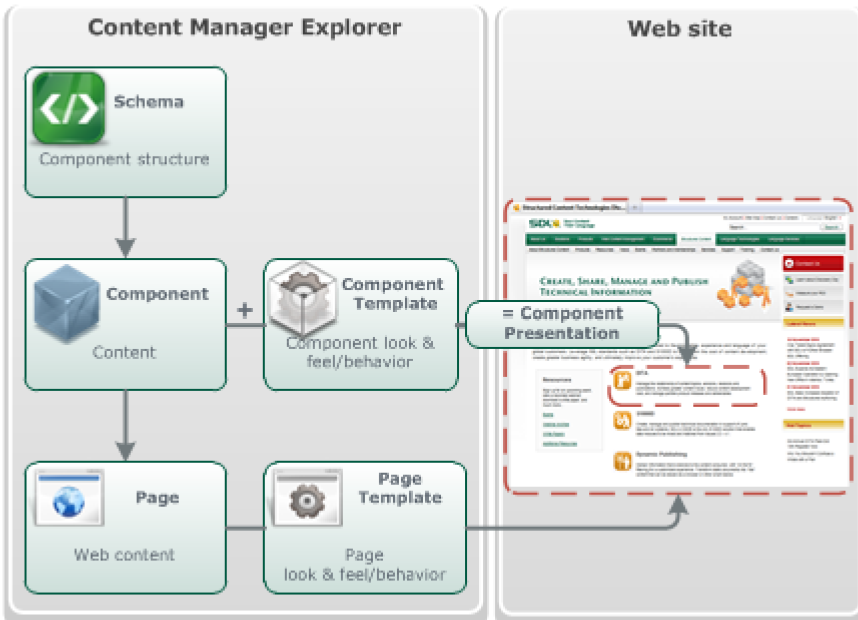
You can view the contents of Multimedia Components by double-clicking the image in the Multimedia Component dialog. The item will open in the associated program using its file extension. If the binary file was uploaded, you can also click **Save to disk**.

Note: This task is useful for *viewing* the binary file only, not for modifying. If you open the binary file in this way, any changes made to the file will be lost. If you do want to change the binary file, save your changes locally, then upload the resulting new file using **Load from disk**. Alternatively, you can use WebDAV to edit the file.

# Chapter 7 Pages

Pages combine Components that define content with templates that define how the content is displayed in the Web page.

The following diagram shows how Pages combine different Content Manager building blocks to create a Page that you can publish to a Web site:




- **Schemas** define the structure of content stored in Components.
- **Components** contain content and are based on Schemas that define what fields you can define.
- **Component Templates** define how Components are displayed in a Web page.
- A **Page** combines a Component and a Component Template to create a **Component Presentation**.
- A **Page Template** defines the site navigation and the look-and-feel of a Page. Page Templates usually define the header, footer, and content frames as well.

## 7.1 Creating a Page

A Page defines the layout and content of a publishable Page. You create Pages within the Structure Groups of Publications.

### Requirements

To create a Page, you must have Page Management rights and write permissions for the containing Structure Group.

## Context

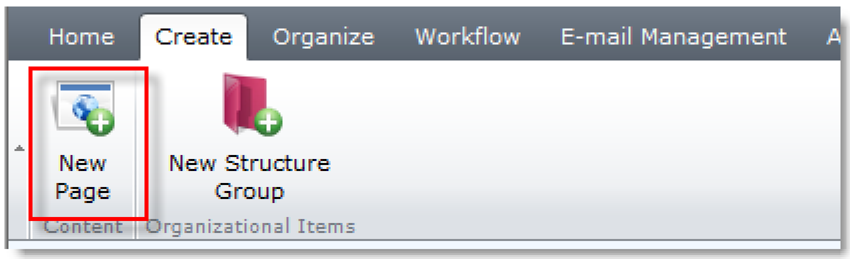
When you create a Page, you specify the building blocks that the Page uses:

- Component Presentations, which are the combination of Components and Component Templates
- A Page Template
- Optionally, a metadata Schema and metadata values

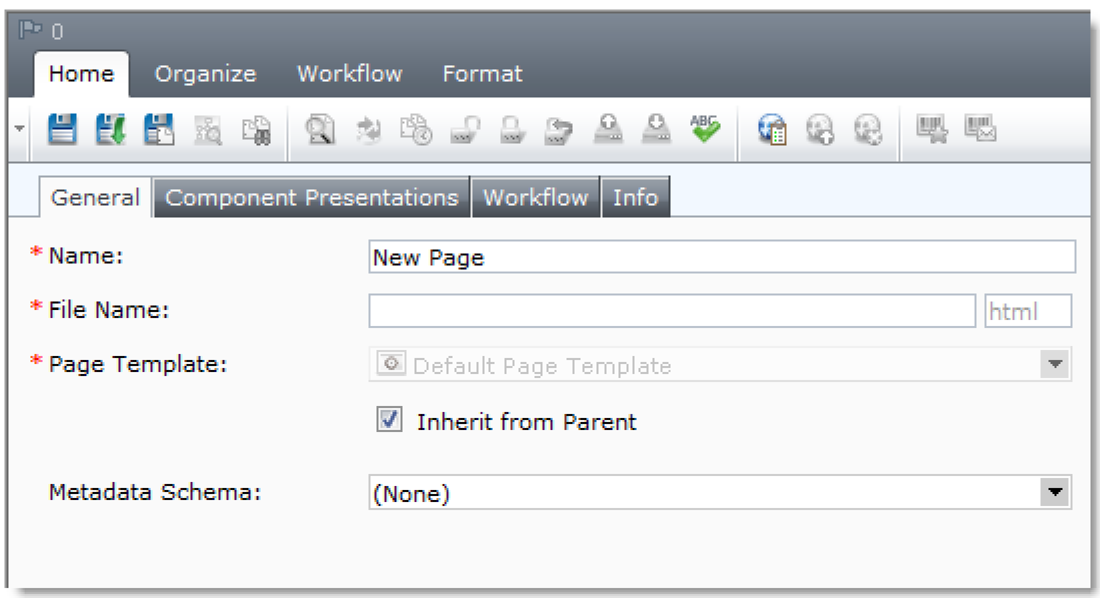
## Steps to execute

1. To create a Page, navigate to the Publication and Structure Group in which you want to create the Page.

2. In the **Create** tab of the Ribbon, click **New Page**:



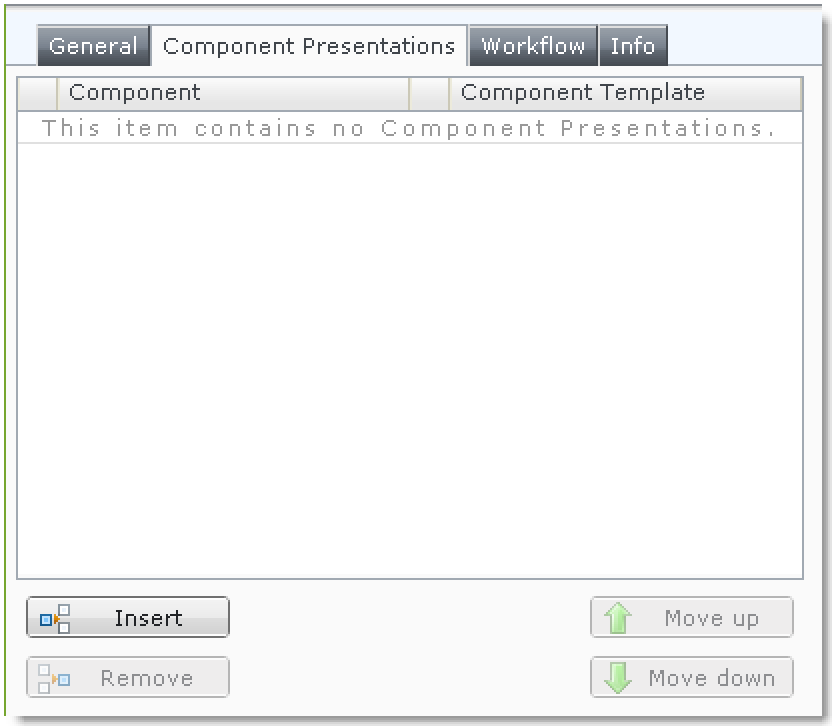

A **New Page** window appears.



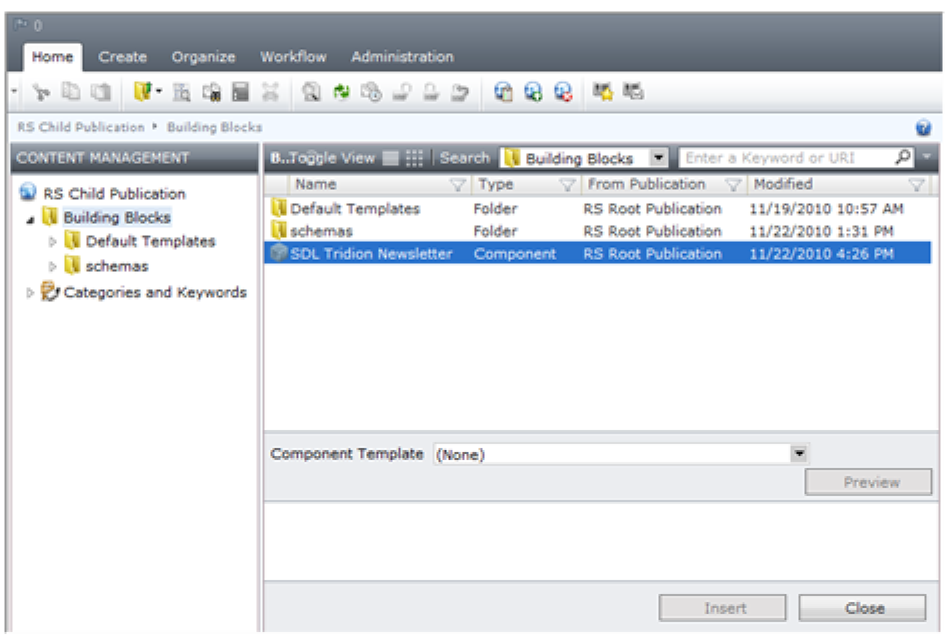

3. On the **General** tab, fill in the following fields:
   - **Name**—the name of the Page must be unique within the Structure Group in which you create it. Content Manager Explorer displays this name in the list view.
   - **File name**—you must make the file name unique within the Structure Group in which you create it. This is the name of the Page as it will appear on the Web site.

- **Page Template**—the Page Template that the Content Manager will use to render the Page. If you click the Inherit From Parent option, the Page uses the default Page Template specified for the Publication.
- **Metadata Schema**—(optional) you can select a metadata schema to create metadata values for the Page. You must fill in any mandatory metadata fields before you can save the Page.

4. Next, select the **Component Presentation** tab.




5. In this tab, click **Insert**. The following dialog appears:



6. To add a Component Presentation to the Page, first find the Component you want to add. You can do this in two ways:
   - In your **Building Blocks** Folder structure, navigate to the location of the Component you want to add.
   - In your **Categories and Keywords**, select a Keyword. The List View displays Components that have been classified with this Keyword or a child Keyword.

   When you have located the Component(s) you want to add, do the following

   a. In the list view, select one or more Components.

   b. Select a Component Template. If you select more than one Component, the Component Template is applied to all of the selected Components.

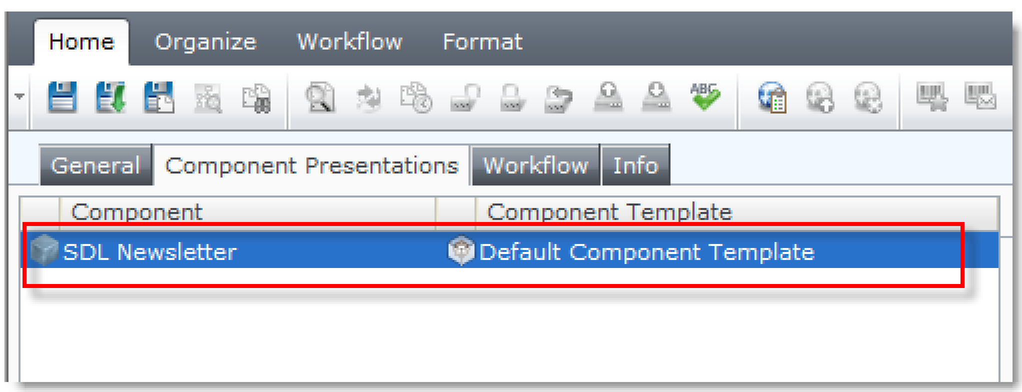
   c. Click **Insert**. A message appears at the bottom of the pane which confirms that you have added one or more Component Presentations to the Page.

   d. Repeat this step to add additional Components.

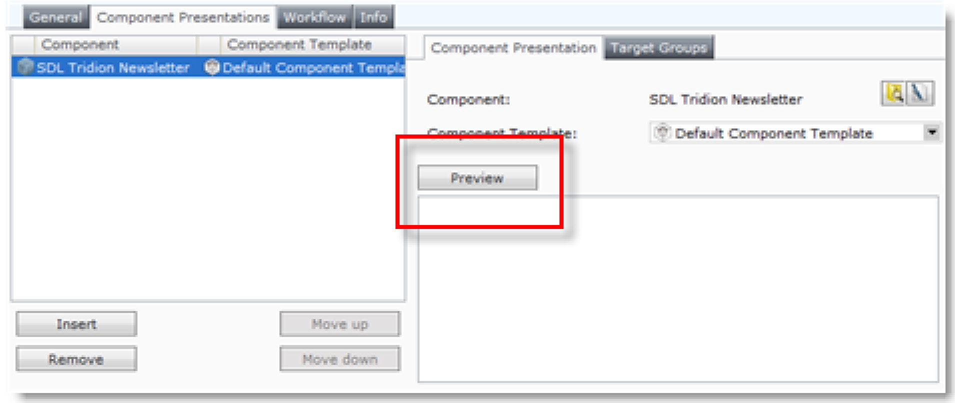
   e. After you finish adding Component Presentations, click **Close** to close the Component Presentations dialog.

   f. In the **Component Presentations** tab, use the **Move up** and **Move down** buttons to adjust the ordering of the Component Presentations on the Page.

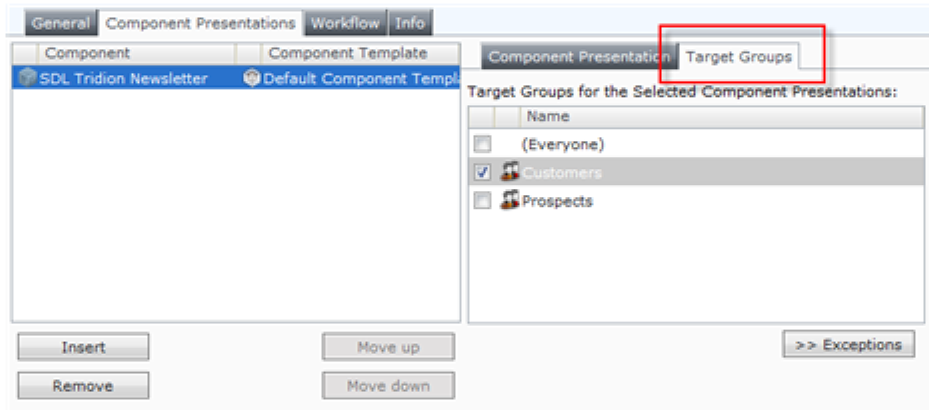
7. To edit a Component Presentation, double-click the Component to open it for editing:




8. To preview the Component using the selected Component Template, select the Component in the list and click **Preview** on the right.




9. To restrict which Web site visitors can see a Component Presentation, select the Component Presentation and click the **Target Group** tab then select the Target Group(s) to which you want to show this Component Presentation.




10. Click the **Save and Close** button on the toolbar.

11. Depending on the Structure Group in which you created this Page, you may now be prompted to add this Page to a Bundle so that it can enter workflow. You can choose to skip this step, but until you add it to a Bundle, your changes will not be checked in.

12. If this item must be added to a Bundle, a dialog opens asking you if you would like to do so now. You can choose **Not Now** to close the dialog, but you see a warning informing you that your item is not in a Bundle, and the same dialog will appear every time you save changes to the item. Alternatively, if you select **Add**, a Bundle selection dialog appears.

13. In the tree structure on the left, navigate to a Publication and Folder that contains a Bundle to which you want to add the item, and add it to that Bundle by selecting the Bundle and clicking **Add**. This adds the item to the selected Bundle and closes the dialog. If the Bundle is already in workflow, the item will be too. You can also select **Close**, which has the same effect as clicking **Not Now** in the previous dialog.

## Result

You have created a Page.

Note: You cannot delete any items used on the Page (Components, Component Templates, Page Templates, and Metadata Schema).

## 7.2 Editing a Page

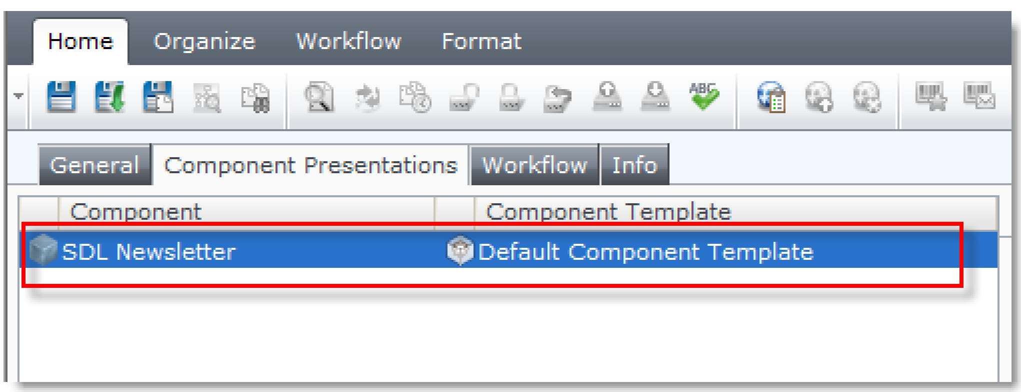
You can edit an existing Page to change general information, Component Presentations and Metadata.

### Requirements

- To edit a Page, you must have Page Management rights and Write permissions for the containing Structure Group.
- You cannot edit the Page if the Content Manager assigned the Page to a different user in a Workflow Process. Only the assignee can edit the Page.
- You can edit a Page if it is a local item or a local copy. You cannot edit a shared Page. For information about localizing a Page, see BluePrinting (see page 53).

### Steps to execute

1. To edit a Page, navigate to the Publication and Structure Group in which the Page you want to edit is located.
2. In the list view, select the Page you want to edit.
3. Click the **Open** icon in the **Home** tab of the Ribbon.
4. If required, edit general Page information in the fields on the **General** tab.
5. To edit Component Presentations, select the **Component Presentation** tab. Double-click the Component to open it for editing:




6. To remove a Component Presentation, select a listed Component Presentation and click **Remove**.
7. To add a Component Presentation to the Page, first find the Component you want to add. You can do this in two ways:

- In your **Building Blocks** Folder structure, navigate to the location of the Component you want to add.
- In your **Categories and Keywords**, select a Keyword. The List View displays Components that have been classified with this Keyword or a child Keyword.

When you have located the Component(s) you want to add, do the following

a. In the list view, select one or more Components.

b. Select a Component Template. If you select more than one Component, the Component Template is applied to all of the selected Components.

c. Click the **Insert** button. A message appears at the bottom of the pane which confirms that you have added one or more Component Presentations to the Page.

d. Repeat this step to add additional Components.

e. After you finish adding Component Presentations, click **Close** to close the Component Presentations dialog.

f. Click the **Move up** button or the **Move down** button to adjust the ordering of the Component Presentations on the Page.

8. On the toolbar, click **Save and Close**.

9. Depending on the Structure Group that contains this Page, you may now be prompted to add this Page to a Bundle so that it can enter workflow. You can choose to skip this step, but until you add it to a Bundle, your changes will not be checked in.

10. If this item must be added to a Bundle, a dialog opens asking you if you would like to do so now. You can choose **Not Now** to close the dialog, but you see a warning informing you that your item is not in a Bundle, and the same dialog will appear every time you save changes to the item. Alternatively, if you select **Add**, a Bundle selection dialog appears.

11. In the tree structure on the left, navigate to a Publication and Folder that contains a Bundle to which you want to add the item, and add it to that Bundle by selecting the Bundle and clicking **Add**. This adds the item to the selected Bundle and closes the dialog. If the Bundle is already in workflow, the item will be too. You can also select **Close**, which has the same effect as clicking **Not Now** in the previous dialog.

## Result

The Content Manager stores a modified version of the Page.

Note: You cannot delete any items used on the Page (Components, Component Templates, Page Templates, Metadata Schema).

# 7.3 Previewing a Page

You can preview a Page from an open Page in edit mode, the open Page in view mode, and directly from the list view.

### Requirements

To preview a Page, you must have Page Management rights and read permissions for the containing Structure Group.

### Steps to execute

1. To preview a Page open in Edit or View mode, click the **Preview** icon in the **Home** tab of the Ribbon toolbar.
2. To preview a Page from the list view:
   a. Navigate to the Publication and Structure Group in which the Page you want to preview is located.
   b. In the list view, select the Page you want to preview.
   c. Click the **Preview** icon in the **Home** tab of the Ribbon.

### Result

A **Preview** window appears which displays the Page.

# 7.4 Publishing a Page

You can publish Pages by publishing the Publication or Structure Group in which they reside or by Publishing the Pages themselves.

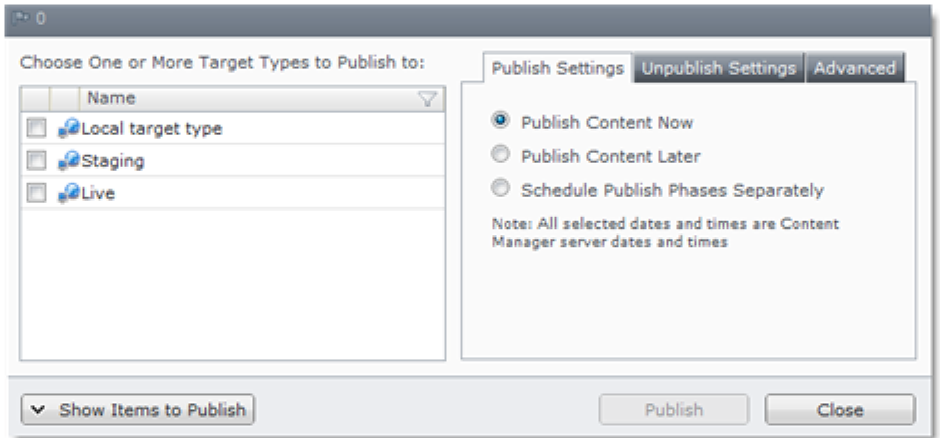
### Context

- A Publication—the Content Manager publishes all Pages in publishable Structure Groups
- A Structure Group—the Content Manager publishes all nested Pages in publishable Structure Groups
- Pages—the Content Manager publishes the Page

## Steps to execute

1. Select one or more items in the navigation pane or list view and do one of the following:
   - Click **Publish** in the **Home** tab of the Ribbon.
   - Right-click the selected items and select **Publishing** > **Publish** from the context menu.

   The **Publish** dialog appears, showing the **Publish settings** tab:

2. Select the **Target Types** to which you want to publish content to.
3. In **Publish Settings**, select when you want the publishing to start.
4. Click **Publish** to start the publishing process.

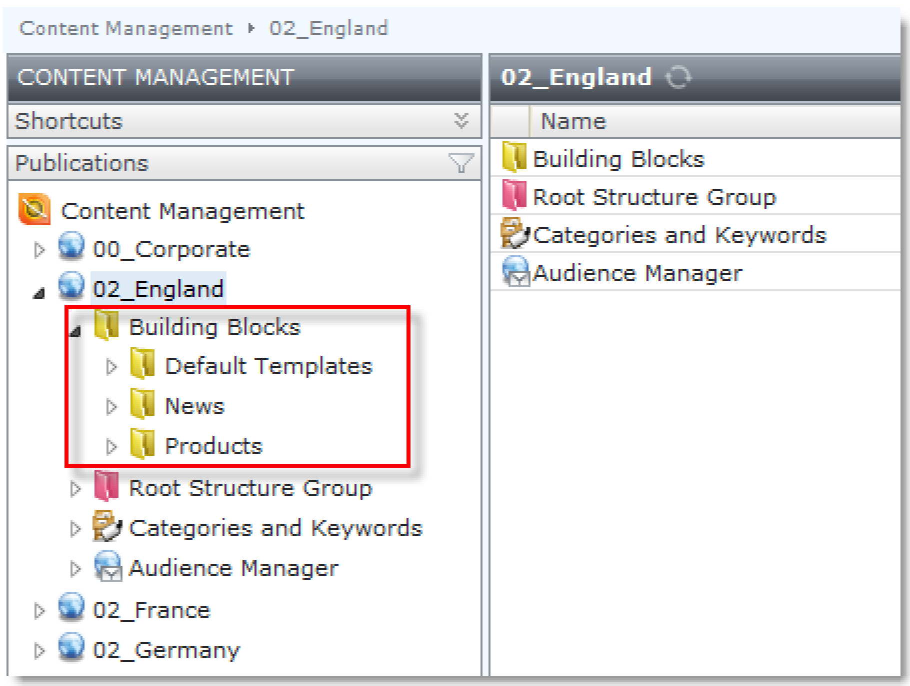
## Next steps

For more information, see Publishing and republishing items from the Content Manager (see page 153).

# Chapter 8 Folders

In a Publication, you use Folders to organize content building blocks such as Schemas, Components, Component Templates, Page Templates, Folders, and Virtual Folders.

You can find Folders in the Building Blocks of a Publication.




## 8.1 Folder settings

Folders have general settings and security settings for Folder permissions.

Folders have the following settings:

**General settings**

- **Name** — you must make the name of the Folder unique within the Folder in which you create it. In a BluePrint, this naming constraint extends to any Parent or Child Publications in the BluePrint.
- **Linked Schema** — (optional) the default Schema for Components created in this Folder.
- **Linked Schema is mandatory** — (optional) Components created in this Folder can only use the Linked Schema.
- **Metadata Schema** — (optional) allows you to specify data in metadata fields that can contain values for the Folder. If these fields are mandatory, you must fill the fields in before you can save the Folder.

**Folder permissions**

By default, a new Folder inherits security settings from the Folder in which you create it.

- **Inherit security settings from Parent** — the Folder inherits security settings from the Folder in which you nest this Folder. You can only change User and Group permissions or Exceptions if you clear this value. If you select this setting, the Content Manager removes any previous settings.
- **Users and Group permissions** — you can set Read, Write, Localize, and Delete permissions for this Folder for each User or Group that has access to this Publication. If you modify them, the Folder will no longer inherit security settings from the Parent Folder.
  - **Read** — the user or group can view items in the Folder
  - **Write** — the user or group can create or edit the items for which they have rights
  - **Delete** — the user or group can delete items for which they have rights
  - **Localize** — the user or group can create a local copy of a shared BluePrint items for which they have rights
- **Exceptions** — exceptions override other permission settings and deny specified user or group read, write, localize and/or delete permissions.

## 8.2 Creating a Folder

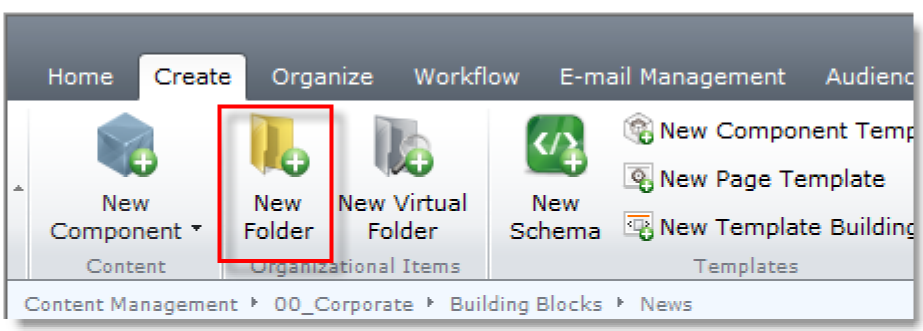
Create a Folder in the Building Blocks of a Publication to organize Schemas, Components, Component Templates, Page Templates, Template Building Blocks, Folders, and Virtual Folders.

### Requirements

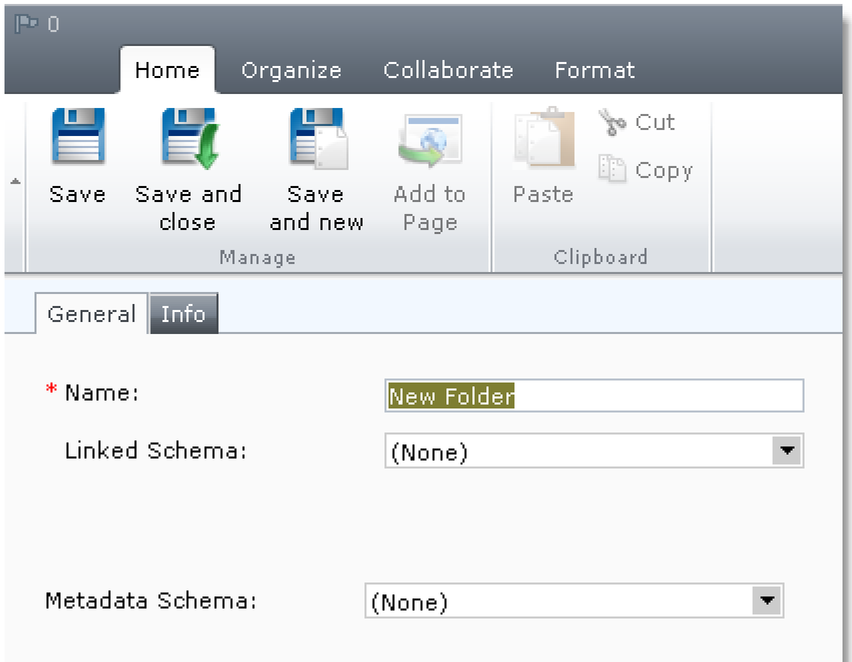
To create a Folder you must have Folder Management rights and Write permissions for the containing Folder.

### Steps to execute

1. To create a Folder, navigate to the Building Blocks of a Publication and the location in which you want to add the Folder.
2. In the **Create** tab of the Ribbon, click **New Folder**.



A **New Folder** window opens.




3. On the **General** tab, fill in the following fields:
   - **Name** — you must make the name of the Folder unique within the Folder in which you create it. In a BluePrint, this naming constraint extends to any Parent or Child Publications in the BluePrint.
   - **Linked Schema** — (optional) the default Schema for Components created in this Folder.
   - **Linked Schema is mandatory** — (optional) Components created in this Folder can only use the Linked Schema.
   - **Metadata Schema** — (optional) allows you to specify data in metadata fields that can contain values for the Folder. If these fields are mandatory, you must fill the fields in before you can save the Folder.

4. Click **Save and close** in the **Home** tab of the Ribbon.

### Result

The Content Manager creates a Folder.

### Next steps

To modify security settings for a Folder, you must first save and close the Folder. Then you can edit the Folder in order to modify security settings.

## 8.3 Editing a Folder

You can edit a Folder to modify the properties of the Folder.

## Requirements

- To edit a Folder you must have Folder Management rights.
- If you want to modify Folder permissions, you must also have Permission Management rights and write permissions for the containing Folder.
- If this Folder is a shared item, you must localize the Folder before you can edit the Folder.

## Steps to execute

1. To edit a Folder, navigate to the Folder you want to edit.

2. In the list view, highlight the Folder, then click the Open button on the toolbar.

3. On the **General** tab, edit the following fields as required:

    - **Name** — you must make the name of the Folder unique within the Folder in which you create it. In a BluePrint, this naming constraint extends to any Parent or Child Publications in the BluePrint.
    - **Linked Schema** — (optional) the default Schema for Components created in this Folder.
    - **Linked Schema is mandatory** — (optional) Components created in this Folder can only use the Linked Schema.
    - **Metadata Schema** — (optional) allows you to specify data in metadata fields that can contain values for the Folder. If these fields are mandatory, you must fill the fields in before you can save the Folder.

    Note: If Component Templates and Page Templates interact with the metadata of the Folder, you may need to modify the Templates

4. If you want to modify Folder permissions, select the **Security** tab, and grant or deny users Read, Write, Localize, or Delete permissions as necessary:

    - **Inherit security settings from Parent** — the Folder inherits security settings from the Folder in which you nest this Folder. You can only change User and Group permissions or Exceptions if you clear this value. If you select this setting, the Content Manager removes any previous settings.
    - **Users and Group permissions** — you can set Read, Write, Localize, and Delete permissions for this Folder for each User or Group that has access to this Publication. If you modify them, the Folder will no longer inherit security settings from the Parent Folder.

        - **Read** — the user or group can view items in the Folder
        - **Write** — the user or group can create or edit the items for which they have rights
        - **Delete** — the user or group can delete items for which they have rights
        - **Localize** — the user or group can create a local copy of a shared BluePrint items for which they have rights

- **Exceptions** — exceptions override other permission settings and deny specified user or group read, write, localize and/or delete permissions.

5. Click the **Save and Close** button on the toolbar.

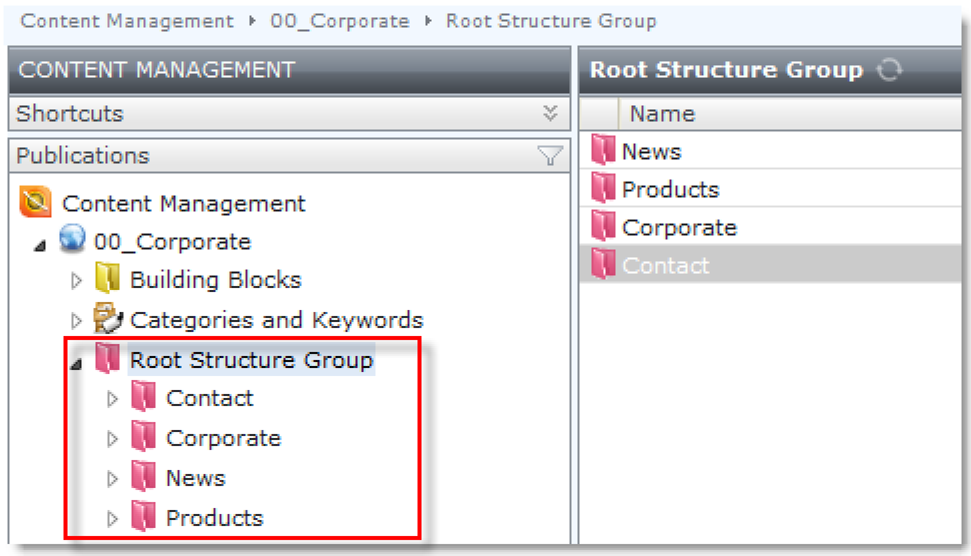
## Result

The Content Manager modifies the Folder settings.

# Chapter 9 Structure Groups

In a Publication, you use Structure Groups to organize, manage, and provide a URL structure for Pages. Each Structure Group represents a separate (sub)section of the resulting Web site.

You can add Pages to each level of a Structure Group and then publish either the entire Structure Group or parts of the Structure Group. For example, the following image depicts the Structure Group of a newspaper. In this example, the News Structure Group contains Careers, Company Information, News, and Products Structure Groups.




You can also use Structure Groups to:

- Manage user and group read, write, localize, and delete permissions for nested items (Pages and other Structure Groups).
- Capture metadata using metadata fields.
- Create a Workflow Process Association so that any Pages created or edited in the Structure Group will follow a Workflow Process.

Note: To create Pages in a Publication, you must create a root Structure Group. You can create other Pages and Structure Groups in the root Structure Group.

## 9.1 Structure Group settings

You can define general settings, Metadata, default Page Template and Workflow settings for Structure Groups.

## General settings

The following table lists the Structure Group general settings.

| Setting | Description |
|---|---|
| **Name** | You must provide a name for the Structure Group that is unique within the Structure Group in which you create it. In a BluePrint, this naming constraint extends to any Parent or Child Publications in the BluePrint. |
| **Directory location** | The Content Manager determines this read-only field at a Publication settings level. You cannot edit it in a Structure Group. |
| **Directory** | The URL of the directory in which the Content Manager will publish Pages created in this Structure Group. If this is a root Structure Group, this field is optional. |
| **Publishable** | A yes/no setting that determines if the Content Manager can publish Pages created in the Structure Group and Pages in nested Structure Groups. This setting defaults to Yes. |

The URL to which the Content Manager publishes Pages is a combination of the following:

- **Publication Target** — the Publication Target is determined by the Target Type to which the user published the item
- **Publication path** — the Publication path is a property of a Publication
- Structure Group directory settings:
    - for a Page, this is the concatenation of the directory properties of all nesting Structure Groups starting with the root Structure Group. Each directory is separated by a forward slash "/".
    - for a multimedia file, this is determined by the Page Template or the Component Template. If the Templates fail to specify a Structure Group, the location defaults to the location specified in the Images URL property of a Publication

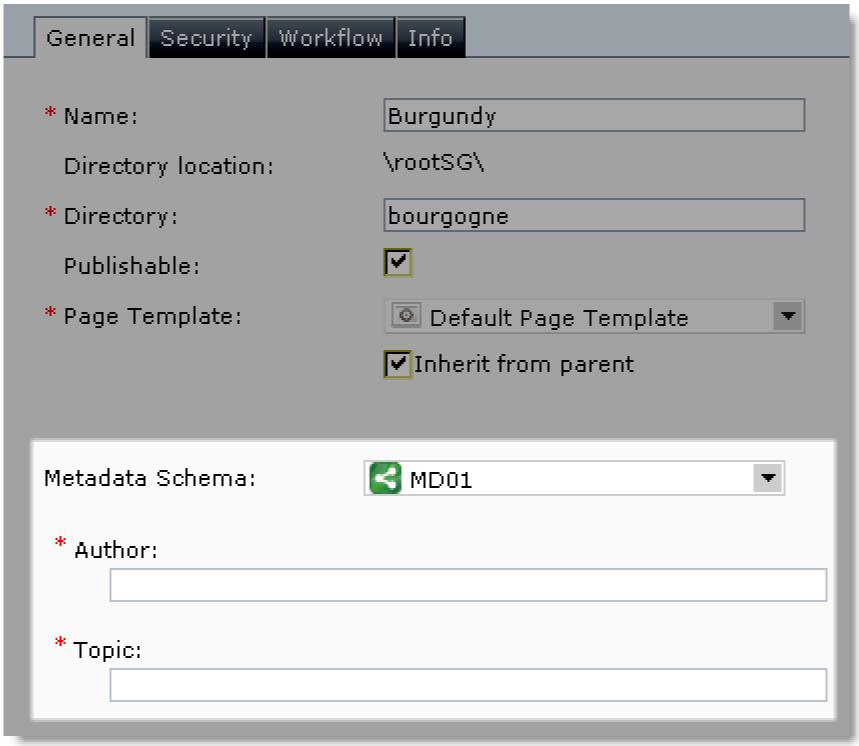
For example, the Target Type "Live" is associated with the Publication Target called Live, which publishes to a specific location (in this example this is `http://www.docs.com`). The Publication URL is "France". The Structure Group directory is `/news/press_release`. A Page published in this Structure Group is published to the following URL:

```
http://www.docs.com/France/News/press_release
```

## Metadata

Structure Groups can also contain Metadata. These are based on Metadata Schemas.

These fields could, for example, store additional information about the colors of the Pages in the Structure Group. These fields interact with the Page Templates and Component Templates used on the Pages.

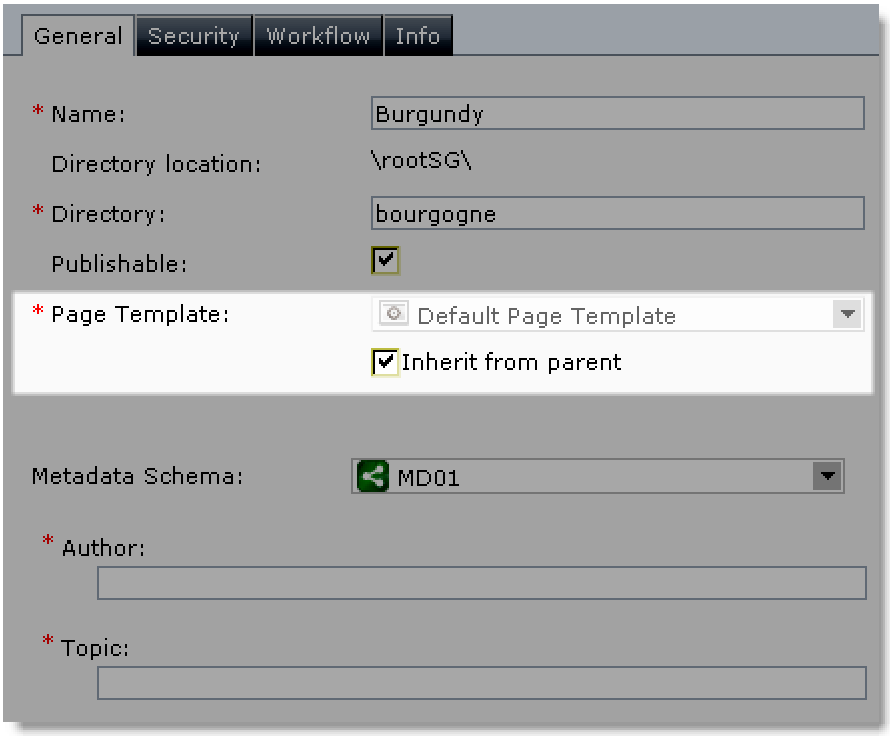



## Default Page Template

You can specify a default Page Template for a Structure Group. The default Page Template specifies the Template that an end user can use in any Pages created in the Structure Group.

If a series of Pages use the default template, you can change the default template in the Structure Group. As a result, all Pages that used the default automatically update to the newly selected Default Page Template.

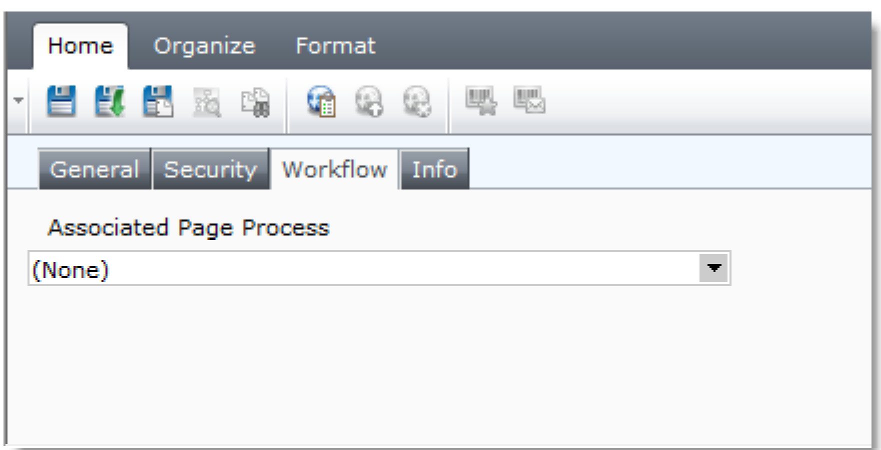
The Inherit from Parent setting determines if this Structure Group inherits the default Page Template from the Structure Group in which this Structure Group is nested. If you select this setting, end users cannot specify a default Page Template.




## Workflow

If you have Workflow Management rights, and Workflow Process Definitions have been created for the Publication, you can create a Process Association in a Structure Group.

When you associate a Workflow Process Definition with a Structure Group, all new or edited Pages that end users store in the Structure Group enter a Workflow Process.




Note: See also .

# 9.2 Creating a Structure Group

You create a Structure Group to organize Pages in a Publication and create a URL structure used in a Web site. You can add metadata to a Structure Group and create Workflow associations so that Pages created in the Structure Group follow the specified Workflow Process

## Requirements

- To create a Structure Group, you must have Structure Group Management rights and Write Permissions for the containing Structure Group.
- To add a Workflow association to the Structure Group, you must also have Workflow Management rights.

## Context

A Structure Group may use the following items:

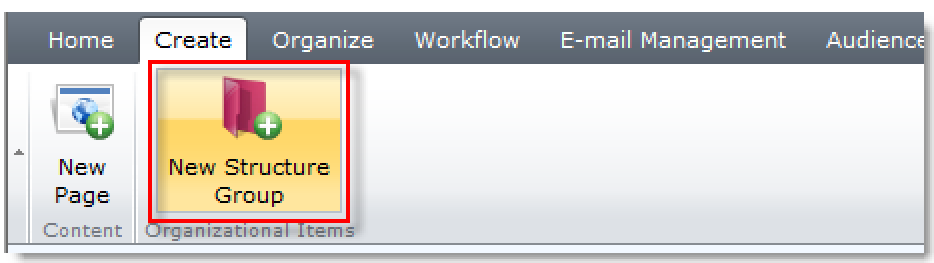
- A metadata Schema, to add metadata values to the Structure Group
- A Workflow Process Definition, to create a Workflow Association to add to the Structure Group.

Note: You can create only one root Structure Group in a Publication.

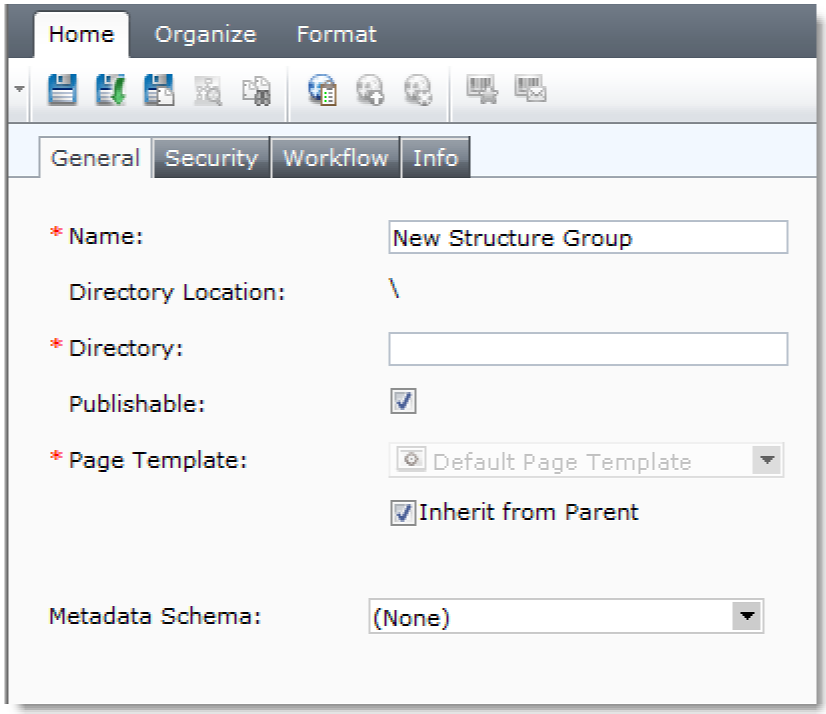
## Steps to execute

1. To create a Structure Group, navigate to the Structure Group in which you want to create a new Structure Group.

2. In the **Create** tab of the Ribbon, click the **New Structure Group** button.




A **New Structure Group** window appears.




3. On the **General** tab, fill in the following fields:
   - **Name** — type the Name of the Structure Group as it will appear in Content Manager Explorer
   - **Directory** — type the name of the Web site URL to which Pages created in this Structure Group will be published. If this is a root Structure Group, this field is optional.
   - **Publishable** — uncheck this option if you do not want the Content Manager to publish this Structure Group or nested Structure Groups
   - **Default Page Template** — select a default Page Template or select **Inherit from Parent**

4. (Optional) To add metadata to this Structure Group, select a **Metadata schema** and fill in metadata fields are required.

5. If you want to specify that a Page in this Structure Group must enter a Workflow Process whenever a user creates such a Page, in the **Workflow** tab, select a value for **Associated Page Process**.

6. If you want to specify that all Pages in this Structure Group must be part of a Bundle, in the **Workflow** tab, select **When a user creates or modifies a Page in this Structure Group, the Page must be in a Bundle**. By selecting a value for **Preferred Workflow Process for this Bundle**, you can make Bundles with that Workflow Process more prominent for the user.

7. Click the **Save and close** button on the **Home** tab of the Ribbon.

## Result

The Content Manager creates a Structure Group.

You can create Pages and other Structure Groups within this Structure Group. If you set the Structure Group to Publishable, the Content Manager publishes Pages in this Structure Group to the Structure Group Directory specified.

## 9.3 Editing a Structure Group

You can edit a Structure Group to change its general settings, permissions, or Workflow association.

### Requirements

To edit a Structure Group, you must have Structure Group Management rights and write permissions for the containing Structure Group.

To edit a Workflow association, you must also have Workflow Management rights.

To edit Structure Group permissions, you must also have Permission Management rights. You cannot edit a shared Structure Group.

### Steps to execute

1. To edit a Structure Group, navigate to the Structure Group you want to edit.

2. In the list view, highlight the Structure Group you want to edit, and click the **Open** button on the **Home** tab on the Ribbon. An edit window opens displaying the Structure Group you selected.

3. Edit the General information, Security settings, and Workflow as necessary.

4. Click the **Save and close** button on the **Home** tab of the Ribbon.

### Result

You have modified the Structure Group settings:

- If you changed the Directory location, you must republish any nested Pages for this new location to take effect on your published site.
- If the Publishable setting is on, and all other publishing settings are configured, users can publish Pages created in the Structure Group. If the Publishable setting is off, users cannot publish Pages and nested Structure Groups.

## 9.4 Publishing or unpublishing Structure Groups

You can publish or unpublish any publishable Structure Group. When you Publish or Unpublish a Structure Group, you publish or unpublish all publishable nested Structure Groups and Pages.

# Chapter 10 Bundles

A Bundle is a container for grouping related content items that reside in different locations in Content Manager so that you can apply Workflow to these items or export or import them as a set.

## 10.1 About Bundles

Bundles have a number of specific properties and behaviors, described in this topic.

**Bundle contents**

You can add any type of versioned content item to a Bundle, including other Bundles. Bundles can contain any number of items and an item can be in any number of Bundles.

**Bundle creation**

You can create a Bundle and then add items to it, or you can create a content item and create a Bundle for it on the fly. When created, a Bundle is stored in a default Folder location, unless you choose a different location.

**Bundles and search**

You cannot search inside a Bundle's contents. You can however, successfully search for a Bundle itself.

**Bundles and BluePrinting**

Bundles can be localized in a child Publication, but only their title and metadata can then be changed. You cannot add items to the localized Bundle.

Also, you can put items shared from a parent Publication in a Bundle. When the Bundle is put in workflow in the current Publication, the item cannot enter workflow in any other Publication until it finishes workflow in the current Publication. While the shared item is in workflow, it can also not be localized or unlocalized (neither in any parent nor in any child of the current Publication). And, while the item is in a Bundle in workflow, it is also not possible to change the BluePrint Publication hierarchy or the priorities of BluePrint Publications.

**Bundles and workflow**

A Bundle may be subject to a Workflow Process Definition. While a Bundle goes through workflow, so do all of the items it contains. These items can have completely separate Workflow Process Definitions associated with them. A Bundle's Workflow Process can be started only when all of its items have completed their own Workflow Processes (if applicable).

A Bundle may contain items that must be in a Bundle (it may also contain items that do not need to be in a Bundle). Any changes to the mandatory items in a Bundle cannot be checked in until the Bundle has started and finished its Workflow Process. That means that even *before* the Bundle enters workflow, changes to the mandatory items are not checked in.

To illustrate what this means, imagine the following sequence of events:

- Alice opens a mandatory item that is in a Bundle. The Bundle is subject to workflow but has not entered workflow yet.
- Alice modifies the item and saves and closes the item to commit her changes. The changes are committed but not checked in.
- Boris opens the same item (or explicitly checks it out) and makes a change, but halfway through editing, he changes his mind.
- Boris selects **Undo Checkout** to discard his changes.
- Content Manager discards all changes that were not checked in, *including the changes made by Alice*.

To alert the user to this, Boris sees a prompt when he opens (or explicitly checks out) the item, alerting him that he is taking ownership of other users' changes to the item, in addition to the changes he will be making. If Boris explicitly checks out the item and takes ownership, he is not prompted again.

When a Bundle that contains another Bundle enters a Workflow Process, the items contained in the 'inner' Bundle are added to the 'outer' Bundle. Any inner Bundle metadata is ignored.

When a Bundle has entered a Workflow Process, you can perform certain tasks only if the current Workflow Activity is configured to allow them: adding or removing items in the Bundle; editing the items in the Bundle; or editing the metadata of the Bundle.

Depending on configuration, Content Manager may *dissolve* the Bundle after the Workflow Process is completed. This means that the Bundle is destroyed, but its items remain. If the Bundle contains any Bundles, finishing the 'outer' Bundle's Workflow Process may also cause any or all of those 'inner' Bundles to be dissolved, even if the outer Bundle is not.

## 10.2 Creating a Bundle

You can create an empty Bundle from the **Create** tab.

### Requirements

To create a Bundle you need Virtual Folder Management rights and Bundle Management rights.

### Steps to execute

1. Access the Content Manager Explorer Web site.
2. Navigate to the Folder in which you want to create a Bundle and in the **Create** tab of the Ribbon toolbar, click the **New Bundle** button.

3. In the dialog that opens, fill in the following information:

   **Name**

   The name for the Bundle.

   **Description**

   A description for the Bundle.

   **Bundle Type**

   The type of Bundle determines whether your Bundle is subject to a Workflow Process, and if so, which Workflow Process.

   **Metadata**

   Based on the Bundle type, you may also see one or more metadata fields.

4. Click **Save and Close** in the Ribbon toolbar of the dialog to create the Bundle.

   The Bundle is created. You can now add items to it.

## 10.3 Adding one item to a Bundle

Add an item to an existing Bundle from its **Bundles** tab. (To add an item to a new Bundle, create the empty Bundle first.) Note that you can add the same item to multiple Bundles, and that you can also add a Bundle itself to a Bundle.

### Requirements

If a Bundle is subject to a Workflow Process and currently in workflow, you can only add an item to it if all of the following are true:

- The Bundle is currently in a Workflow state that allows the adding of items to it.
- The item you intend to add is a Component, Page, Component Template, Page Template, Template Building Block or another Bundle.
- The item you intend to add is not currently in workflow.

### Steps to execute

1. In the tree on the left, navigate to a location that contains the item you want to add to a Bundle.

2. Open the item and select the **Bundles** tab in the item dialog that opens.

   You see a list of one or more Bundles that this item currently belongs to.

3. Select **Add to a Bundle**.

   A dialog opens showing a Folder tree on the left.

4. Navigate to the location of your Bundle in the Folder tree and open it, then select the Bundle in the list view and select **Add**. The button is disabled if you cannot add the item to this Bundle (for example, if the item is the Bundle itself).

   SDL Tridion adds the item to the Bundle and closes the dialog. The Bundle appears in the list of Bundles on the **Bundles** tab. If the Bundle is currently in workflow, the item is assigned to the User Group associated with the current Activity.

5. Repeat steps 3 and 4 as needed to add the item to more Bundles.

6. Close the item dialog.

# 10.4 Selecting items and adding them to a Bundle

Add items to an existing Bundle from the **Home** tab of the Ribbon toolbar. (To add items to a new Bundle, create the empty Bundle first.)

### Requirements

If a Bundle is subject to a Workflow Process and currently in workflow, you can only add items to it if all of the following are true:

- The Bundle is currently in a Workflow state that allows the adding of items to it.
- The items you intend to add are all Components, Pages, Component Templates, Page Templates, Template Building Blocks and/or other Bundles.
- The items you intend to add are not currently in workflow.

### Steps to execute

1. In the tree on the left, navigate to a location that contains one or more items you want to add to a Bundle. Note that you can add the same item to multiple Bundles, and that you can also add Bundles themselves to a Bundle.

2. Select the item(s) you want to add, and in the **Home** tab of the Ribbon toolbar, select **Add to Bundle**.

   A dialog opens showing a Folder tree on the left.

3. Navigate to the location of your Bundle in the Folder tree and open it, then select the Bundle in the list view and select **Add**. The button is disabled if you cannot add all the selected items to this Bundle (for example, if one of the selected items is the Bundle itself).

   SDL Tridion adds the selected item(s) to the Bundle and closes the dialog. If the Bundle is currently in workflow, the selected item(s) are assigned to the User Group associated with the current Activity.

# 10.5 Selecting a Bundle and adding items to it

Use the context-sensitive **Bundle** tab, which appears when you select a Bundle, to add items to that Bundle.

### Requirements

If a Bundle is subject to a Workflow Process and currently in workflow, you can only add items to it if all of the following are true:

- The Bundle is currently in a Workflow state that allows the adding of items to it.
- The items you intend to add are all Components, Pages, Component Templates, Page Templates, Template Building Blocks and/or other Bundles.
- The items you intend to add are not currently in workflow.

### Steps to execute

1. From the tree on the left, navigate to the Folder than contains the Bundle to which you want to add items.
2. Open the Bundle in the tree or in the list view and in the **Bundle** tab that appears in the Ribbon toolbar, select **Add Items to Bundle**.

   A dialog opens showing a tree structure for the current Publication.
3. Navigate to a location containing one or more items that you want to add to the Bundle, select the item(s) and click **Add**.
4. Repeat the previous step until you have added all items to the Bundle that you wanted to add, and then click **Close**.

   SDL Tridion adds the selected item(s) to the Bundle and closes the dialog. If the Bundle is currently in workflow, the selected item(s) are assigned to the User Group associated with the current Activity.

# 10.6 Removing one item from a Bundle

Remove an item from a Bundle in the **Bundles** tab of the item dialog.

### Requirements

If a Bundle is subject to a Workflow Process, you can only remove the item from it if all of the following are true:

- The Bundle is currently not in a Workflow state that prohibits the removing of items from it.
- The items you intend to remove is not currently being worked on by a User that is not you.

### Steps to execute

1. From the tree on the left, navigate to the Folder that contains the item you want to remove.
2. Open the item and select the **Bundles** tab in the item dialog that opens.

   You see a list of one or more Bundles that this item currently belongs to.
3. Select the Bundle from which you want to remove this item and select **Remove from Bundle**.

   The item is removed from the Bundle and the Bundle disappears from the list. If the Bundle is in workflow, the item is taken out of workflow in its current state. It retains its current Approval Status.
4. Repeat the previous step as needed to remove it from other Bundles.
5. If the selected item is required to be part of a Bundle, and you removed it from its only Bundle, you must add it to at least one Bundle again, and complete that Bundle's Workflow Process, if any, before you can check in any changes to the item.
6. Close the item dialog.

## 10.7 Removing items from a Bundle

Remove items from a Bundle in the context-sensitive **Bundle** tab that appears when you select a Bundle.

### Requirements

If a Bundle is subject to a Workflow Process, you can only remove items from it if all of the following are true:

- The Bundle is currently not in a Workflow state that prohibits the removing of items from it.
- None of the items you intend to remove are currently being worked on by a User that is not you.

### Steps to execute

1. From the tree on the left, navigate to the Folder that contains the Bundle from which you want to remove items.ß
2. Open the Bundle in the tree or in the list view.

   The Bundle shows its contents in the list view on the right, and a **Bundle** tab appears in the Ribbon toolbar.
3. Do one of the following:
   - Select any number of items from the list and click **Remove from Bundle** in the **Bundle** tab.
   - Select one or more items, right-click and from the context menu that opens, select **Remove from Bundle**.

The selected items are removed from the Bundle. If the Bundle is in workflow, the items are taken out of workflow in its current state. It retains its current Approval Status.

4. If any of the selected items are required to be part of a Bundle, and are now no longer in a Bundle, you must add them to at least one Bundle again, and complete that Bundle's Workflow Process, before you can check in any changes to those items.

## 10.8 Publishing or unpublishing a Bundle

You can publish or unpublish a Bundle. This causes all publishable items in the Bundle to be published or unpublished. Non-publishable items in the Bundle are ignored.

## 10.9 Viewing the properties of a Bundle

View the properties of a Bundle in a popup dialog. You can also start workflow on this Bundle from this popup dialog.

### Steps to execute

1. From the tree on the left, navigate to the Folder that contains the Bundle.
2. Select the Bundle in the list view, and in the **Home** tab of the Ribbon toolbar, click **Properties**.

   A dialog opens showing the properties of this Bundle:

3. Examine the Bundle properties:

   **Name**

   The name for the Bundle.

   **Description**

   A description for the Bundle.

   **Bundle Type**

   The type of Bundle determines whether your Bundle is subject to a Workflow Process, and if so, which Workflow Process.

   **Metadata**

   Based on the Bundle type, you may also see one or more metadata fields.

4. If the Bundle is associated with a Workflow Process Definition and is currently not in workflow, you can start workflow on the Bundle by selecting **Start Workflow Process** in the **Home** tab.

# 10.10 Starting Workflow on a Bundle

Unlike other items, Bundles do not enter a Workflow Process automatically in response to a trigger; instead, you must start workflow manually. This topic explains how. Starting workflow on a Bundle places all items in that Bundle in workflow.

## Requirements

To be able to enter workflow, a Bundle must meet the following requirements:

- The Bundle must be based on a Bundle Schema that has an **Associated Bundle Process** configured in its **Workflow** tab.
- The Bundle must either be empty, or only contain items that can enter workflow, that is:
  - Components
  - Pages
  - Component Templates
  - Page Templates
  - Template Building Blocks
  - Bundles
- None of the items in the Bundle is currently in a Workflow Process.

## Steps to execute

1. Access the Content Manager Explorer Web site.

2. Navigate to the Publication and Folder that contains the Bundle on which you want to start Workflow.

3. Select the Bundle in the tree on the left.

   The **Bundle** tab appears in the Ribbon, and is selected.

4. Select **Start Workflow** in the **Bundle** tab.

   The **Start Workflow** button shows an error if one or both of the following is true:

   - One or more of the items in the Bundle is itself still in workflow. To fix this problem, find out to whom the item is currently assigned and follow the item through to the end of its Process Instance.
   - One or more of the items in the Bundle cannot be subject to workflow. Only Components, Pages, Component Templates, Page Templates, Template Building Blocks and Bundles can be subject to workflow. To fix this problem, remove all other types of items from the Bundle.

   If no error appears, SDL Tridion places all items in the Bundle in workflow, and triggers the first Activity in the Workflow Process Definition associated with the Bundle Schema of this Bundle.

   If this first Activity is an Automatic Activity, SDL Tridion performs it and any other Automatic Activities that directly follow this one until it reaches a Manual Activity.

As soon as the first Manual Activity is reached, that Activity appears in the Assignment List of all the members of the User Group associated with that Activity.

## 10.11 Workflow tab of a Bundle

If you open a Bundle in Content Manager Explorer, the **Workflow** tab gives you information about the workflow properties of that Bundle.

If the Workflow tab shows only the text **Approval Status:** followed by a value, one of the following is the case:

- If the value is **Undefined**, the item is either not subject to Workflow at all, or it has never entered a Workflow Process.
- If the value is **Unapproved**, the item has completed at least one Workflow Process, which did not assign any Approval Status to the item.
- If the value is neither **Undefined** nor **Unapproved**, the item has completed at least one Workflow Process, which last assigned the Approval Status you see to the item.

If the Workflow tab shows a **History of Activites** area in the top half and an **Activity Details** area in the bottom half, then the item is subject to workflow and currently in a Workflow Process.

You see the following:

**History of Activities**

A list of the Activities of this Process. If the item has already gone through and finished a Workflow Process in the past, you see a dropdown from which you can select previous finished Workflow Processes.

The **History of Activities** area shows the following properties per Activity:

**<Icon>**

If the icon shows a green checkmark, the Activity has finished; if not, it has not finished yet.

**Name**

The name of the Activity, preceded by a number of indicate which step in the Process this is. (The number is useful to distinguish, say, a first review Activity from a second review Activity.)

**Owner**

The User currently performing the Activity. If this is empty, the item has been assigned, but not picked up yet.

**Assigned To**

The Group or User to whom this Activity is or was assigned.

**Approval Status**

The Approval Status of the item after this Activity has finished.

**Activity <number> <name of Activity>**

This area shows the properties of the currently selected Activity. The area label is the word 'Activity', followed by a number to indicate which step in the Process this is, followed by the Activity name. (The number is useful to distinguish, say, a first review Activity from a second review Activity.)

You see the following Activity Details:

**Description**

A description of what this Activity entails.

**Assigned to**

The Group or User to which this Activity was assigned.

**Performer**

If the Activity has a Started or Finished state, the name of the User who is currently performing (if Started) or has most recently performed (if Finished) the Activity.

**Assigned on**

A timestamp representing the moment at which the Activity was assigned, immediately after the previous Activity finished.

**Started on**

If the Activity has a Started or Finished state, a timestamp representing the moment at which a User picked up the Activity.

**Time Spent**

If the Activity has a Finished state, the amount of time that has passed from the moment the Activity was first assigned, to the moment a User finished the Activity.

**Finished on**

If the Activity has a Finished state, a timestamp representing the moment at which a User finished the Activity.

**State**

Only if the Activity failed or was suspended, its state.

**State Message**

Only if the Activity failed or was suspended, the reason for this failure or suspension.

**Previous Activity Message**

A message provided by the User who finished the previous Activity in this Workflow Process, typically intended as instructions to the current Owner.

The **Related Items** area shows the list of items associated with the current Activity.

If you select an item, you can do the following:

**Preview**

Preview the item in a new dialog.

**Open**

Open the item for editing in a new dialog.

### Compare

If you also select two Activities from the **History of Activities** list, **Compare** shows you how the selected item changed between those two Activities. This button is disabled if Content Manager is not configured to save snapshots of the item you selected.

# Chapter 11 Workflow

This section explains how to pick up, start, perform and finish Workflow Activities, how to create a Task, and how to check the workflow properties of items that are subject to workflow.

## 11.1 Picking up a Workflow Activity assigned to your Group

If a Workflow Activity is assigned to your Group, a notification appears in the top right hand side of your screen. You can also see all Workflow Activities assigned to your Group in the **Things to do** popup, also accessible from the top right hand side of your screen. You can look at the Activity's details and decide to pick it up.

### Steps to execute

1. You can pick up a Workflow Activity assigned to your Group in one of the following ways:
   - Respond to a notification immediately: when a notification appears with the message **ITEM was assigned to your Group**, where *ITEM* is the name of an Activity, click **Show Activity**. A dialog opens with details about this Activity.
   - Respond to a notification later: when a notification appears, and then disappears, with the message **ITEM was assigned to you** or **ITEM was assigned to your Group**, where *ITEM* is the name of an Activity, click the notifications area to see it again, then click **Show Activity**. A dialog opens with details about this Activity.
   - Check Assigned Activities: click the Workflow area at top right and in the dialog that opens, click **Assigned Activities** to see a list of all Activities assigned to you or your Group that are not yet picked up. Select an Activity to see its details.

   You can now click **Start Activity** to take ownership and start working on the Activity.

   The Activity is added to your **Started Activities** list, and you see its details screen with a **Finish Activity** button. No other member of your Group can work on this Activity. The number in your Workflow area goes up by 1.

## 11.2 Performing a Workflow Activity you have picked up

View Workflow Activities you have picked up at the top right hand part of the screen, and perform the Activity.

### Steps to execute

1. Access the Content Manager Explorer Web site.
2. Click the Workflow area in the top right part of the screen and in the **Things to do** dialog that opens, select **Started**.

   You see Activities that you started.
3. Select an Activity.

   A detail screen for this Activity appears.
4. Perform an Activity in one of the following ways:

   a. If the Activity is a Task, that is, if it has no items associated with it, study the title and description of the Task, and perform it.

   b. If the Activity has one or more items associated with it, select each item in turn to open it in a form-based dialog. Examine and, if need be, edit the item, and save and close it. Repeat until you have dealt with all items.

   You are now done with your Activity and you can finish it.

## 11.3 Reassigning a Workflow Activity you have picked up

After you have started an Activity, you can (and sometimes must) reassign it to another User or Group.

### Context

In certain situations, you may find yourself wanting to reassign an Activity you started. For example:

- Your Activity is the creation of an article on the Web site. You have created the text for the article, but in this specific case, you need a photo or graphic to go with the text. In this case, you would want to reassign the Activity to someone in the Graphics department, so you would assign it to that Group.
- You started an Activity but you realize you will be too busy to finish it within the time allotted. For that reason, you would like to assign it to another User in your Group.

In addition, you sometimes must reassign an Activity you started because you have no access to one or more of its related items. For example, you may have the right to edit the contents and image of a product description, but not to edit the price. In this case, you must reassign the item to another User or Group.

### Steps to execute

1. Access the Content Manager Explorer Web site.
2. Click the Workflow area in the top right part of the screen and in the **Things to do** dialog that opens, select **Started**.

   You see Activities that you started.
3. Select an Activity.

   A detail screen for this Activity appears.
4. Reassign the Activity in one of the following ways:

   a. To reassign the Activity to a Group, select **Assign to a Group**, select a Group from the dropdown list, and click **Reassign**.

      The Activity disappears from your list and appears in the **Assigned** list of all members of the Group you selected.

   b. To reassign the Activity to a User, select **Assign to a User**, select a User (typically from your Group) from the dropdown list, and click **Reassign**.

      The Activity disappears from your list and appears in the **Started** list of the User you selected.

## 11.4 Finishing a Workflow Activity you have performed

When you have finished performing a Workflow Activity, indicate this by explicitly finishing the Activity. If you find that you cannot finish the Activity, you must reassign it to another User or Group.

### Steps to execute

1. Open a browser, access a Web page that is editable and start editing by clicking the **SDL Tridion** button at the top left corner of the page.
2. Click the Workflow area in the top right part of the screen and in the **Things to do** dialog that opens, select **Started**.

   You see Activities that you started.
3. Select the Activity you want to finish.

   A detail screen for this Activity appears.

4. Click **Finish Activity**.

   You see a **Finish ITEM** dialog, where *ITEM* is the Activity you have finished working on.

5. Under **Finish Activity Message**, you can enter any comment you like about the Activity you performed.

6. If finishing this Activity involves a decision (for example, to approve or reject reviewed content), select the next Activity to be performed from the **Next Activity** dropdown you see.

7. If you want, you can change the name of the next Activity in the **Title** field.

8. Click **Done** to finish this Activity.

   The Activity is finished and possibly gets assigned to another Group. You see your **Started Activities** list again, now without the Activity you just finished. The number in your Workflow area goes down by 1.

## 11.5 Publishing and previewing items in Workflow

If an item achieves a Workflow status known as *minimum approval status* for a destination, you can publish it to that destination. If the item is in Workflow and does not meet the minimum approval status, the Content Manager publishes the last checked-in version of the item (if it exists).

## 11.6 Creating a Task

You can create a Workflow Process that does not involve any content items, and assign it to a User or Group. Such a Process is called a Task.

### Steps to execute

1. Access the Content Manager Explorer Web site.

2. Click the Workflow area in the top right part of the screen and in the **Things to do** dialog that opens, click the **Add** button (labeled **+**).

   A **New Task** dialog opens.

3. Under **Title**, briefly describe the Task.

4. Select if you want to assign the Task to a Group or a User.

   The dropdown shows Groups or Users.

5. Select the Group or User from the dropdown.

6. If you want, select a Publication from the **Publication** dropdown. This is only necessary if your implementation of SDL Tridion has different types of Tasks, and you know which Publication is associated with which type of Task.

7. Click **Assign Task**.

   The User(s) to which you assigned the task see a notification that this Task was assigned to them. The Task also appears alongside their other Workflow Activities in the **Assigned** list of the **Things to do** dialog.

## 11.7 Workflow Activity Details

The details displayed for an Activity.

In your Assigned or Started screen, select any Activity to see its details.

You see the following Activity Details:

**Name**

The name of this Activity.

**Task Name**

If this Activity is applied to a type of item, the name of that item; if this Activity is a Task, the name of the Task.

**Assigned to**

The Group or User to which this Activity was assigned.

If you select **Show more**, you also see the following details:

**Description**

A description of what this Activity entails.

**Approval Status**

The Approval Status determines whether or not the item(s) associated with this item can be published to a specific Target Type.

**Assigned on**

A timestamp representing the moment at which the Activity was assigned, immediately after the previous Activity finished.

**Performer**

If the Activity has a Started or Finished state, the name of the User who is currently performing (if Started) or has most recently performed (if Finished) the Activity.

**Started on**

If the Activity has a Started or Finished state, a timestamp representing the moment at which a User picked up the Activity.

**Previous Activity Message**

A message provided by the User who finished the previous Activity in this Workflow Process, typically intended as instructions to the current Owner.

The **Related Items** area shows the list of items associated with the current Activity.

Click the **Open** button at the right of an item to open the item in a dialog.

## 11.8 Workflow tab of an item subject to workflow

If you open an item that is subject to workflow in Content Manager Explorer, the **Workflow** tab of the item dialog gives you information about the workflow properties of the item.

The following types of items have a **Workflow** tab:

- Components
- Pages
- Component Templates
- Page Templates
- Template Building Blocks
- Bundles

If the Workflow tab shows only the text **Approval Status:** followed by a value, one of the following is the case:

- If the value is **Undefined**, the item is either not subject to Workflow at all, or it has never entered a Workflow Process.
- If the value is **Unapproved**, the item has completed at least one Workflow Process, which did not assign any Approval Status to the item.
- If the value is neither **Undefined** nor **Unapproved**, the item has completed at least one Workflow Process, which last assigned the Approval Status you see to the item.

If the Workflow tab shows a **History of Activites** area in the top half and an **Activity Details** area in the bottom half, then the item is subject to workflow and currently in a Workflow Process.

You see the following:

**History of Activities**

A list of the Activities of this Process. If the item has already gone through and finished a Workflow Process in the past, you see a dropdown from which you can select previous finished Workflow Processes.

The **History of Activities** area shows the following properties per Activity:

**<Icon>**

If the icon shows a green checkmark, the Activity has finished; if not, it has not finished yet.

**Name**

The name of the Activity, preceded by a number of indicate which step in the Process this is. (The number is useful to distinguish, say, a first review Activity from a second review Activity.)

**Owner**

The User currently performing the Activity. If this is empty, the item has been assigned, but not picked up yet.

**Assigned To**

The Group or User to whom this Activity is or was assigned.

**Approval Status**

The Approval Status of the item after this Activity has finished.

**Activity <number> <name of Activity>**

This area shows the properties of the currently selected Activity. The area label is the word 'Activity', followed by a number to indicate which step in the Process this is, followed by the Activity name. (The number is useful to distinguish, say, a first review Activity from a second review Activity.)

You see the following Activity Details:

**Name**

The name of this Activity.

**Description**

A description of what this Activity entails.

**Task Name**

If this Activity is applied to a type of item, the name of that item; if this Activity is a Task, the name of the Task.

**Process Definition**

The name of the Workflow Process Definition that this Activity belongs to.

**Approval Status**

The Approval Status determines whether or not the item(s) associated with this item can be published to a specific Target Type.

**Assigned to**

The Group or User to which this Activity was assigned.

**Performer**

If the Activity has a Started or Finished state, the name of the User who is currently performing (if Started) or has most recently performed (if Finished) the Activity.

**Assigned on**

A timestamp representing the moment at which the Activity was assigned, immediately after the previous Activity finished.

**Started on**

If the Activity has a Started or Finished state, a timestamp representing the moment at which a User picked up the Activity.

**Finished on**

If the Activity has a Finished state, a timestamp representing the moment at which a User finished the Activity.

**Previous Activity Message**

A message provided by the User who finished the previous Activity in this Workflow Process, typically intended as instructions to the current Owner.

**Time Spent**

If the Activity has a Finished state, the amount of time that has passed from the moment the Activity was first assigned, to the moment a User finished the Activity.

**Publication**

The Publication that contains the item(s) involved in this Activity.

**State**

Only if the Activity failed or was suspended, its state.

The **Related Items** area shows the list of items associated with the current Activity.

If you select an item, you can do the following:

**Preview**

Preview the item in a new dialog.

**Open**

Open the item for editing in a new dialog.

**Compare**

If you also select two Activities from the **History of Activities** list, **Compare** shows you how the selected item changed between those two Activities. This button is disabled if Content Manager is not configured to save snapshots of the item you selected.

# Chapter 12 Metadata and Keywords

You use Keywords and metadata to classify content.

Content retrieval and management of data depends on the effective classification and tagging of your information.

**Metadata**

Metadata is data about data. You can add metadata to the following item types in the Content Manager:

- Components
- Multimedia Components
- Keywords
- Publications
- Folders and Virtual Folders
- Structure Groups
- Pages

Note: Implementers can also apply metadata to Component Templates, Page Templates, and Template Building Blocks.

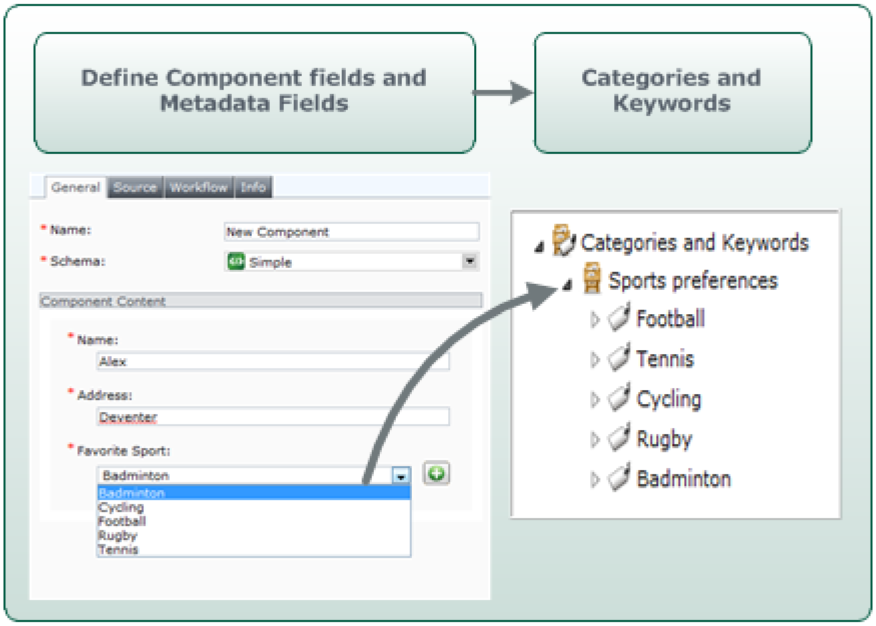
**Keywords**

**Keywords**—A Category is a general classification and a Keyword is a value in a Category. Keywords define a classification scheme (a taxonomy tree) that provide a knowledge map of your data. You can apply Keywords to the following content:

- Component fields
- Metadata fields

Note that Publications cannot be classified and do not appear as Related Items.

The following image shows how Categories and Keywords are used to define Component fields and Metadata fields:




## 12.1 Defining metadata

You can add metadata to Components and Multimedia Components, Publications, Folders and Virtual Folders, Structure Groups, and Pages, and Categories and Keywords.

### Requirements

- To allow users to add metadata to Components and Multimedia Components, the Component Schema or Multimedia Schema must have metadata fields defined.
- To allow users to add metadata to Publications, Folders and Virtual Folders, Structure Groups, Pages and Keywords, you must have defined a Metadata Schema.

Note: For more information about Schemas, see the implementer's documentation portal.

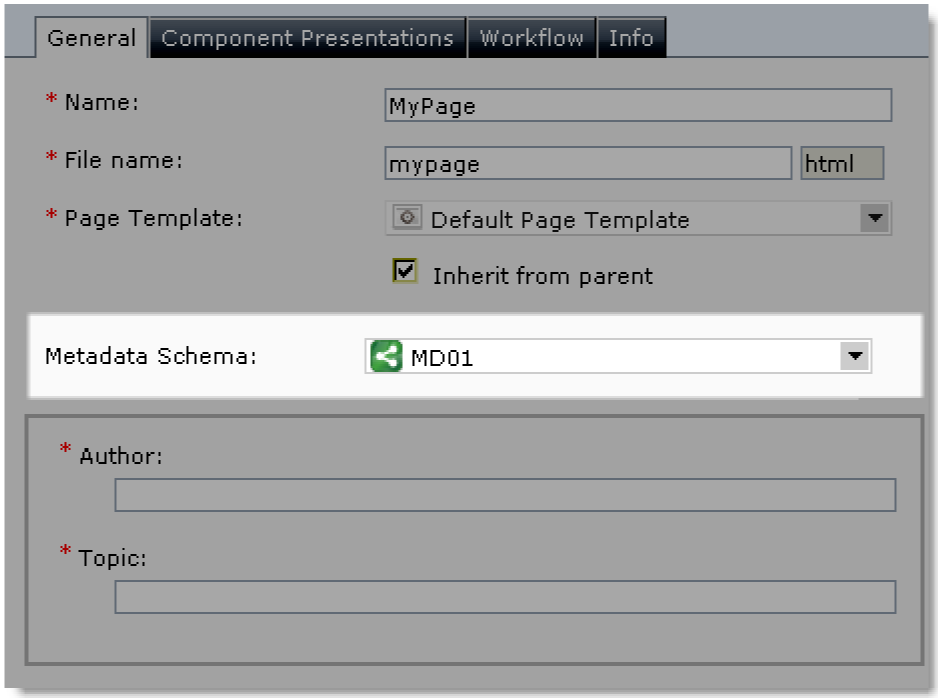
### Context

Component metadata can include for example Author name, Author email, Publish date, Offline date. Multimedia Component metadata, for a photographic image for example, can include details such as the date the photograph was taken and details of the camera settings such as lens, focal length, aperture, shutter timing.

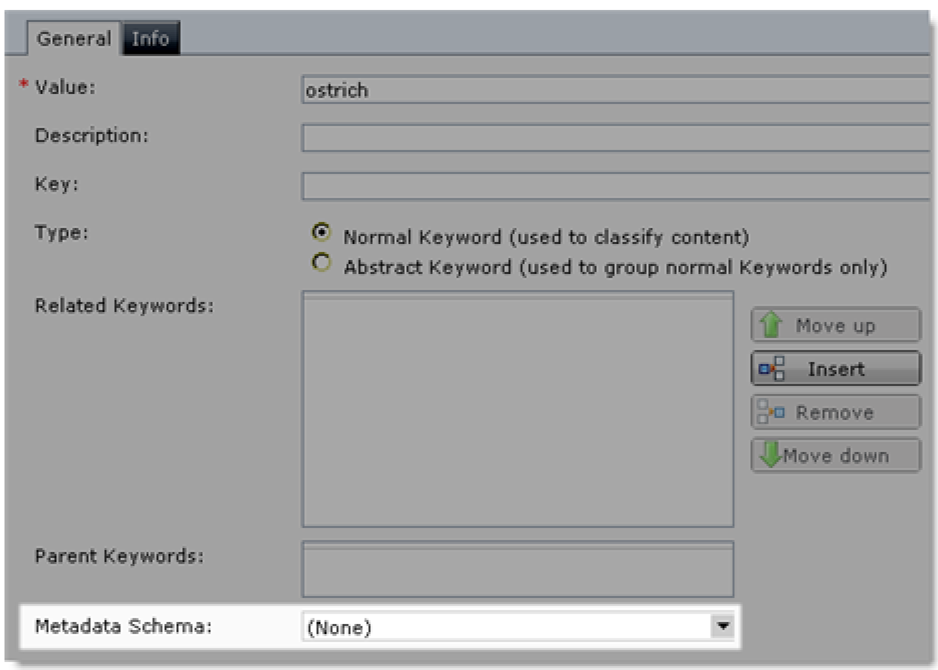
### Steps to execute

1. Open a Component or Multimedia Component and define Metadata in the item's **Metadata** tab.

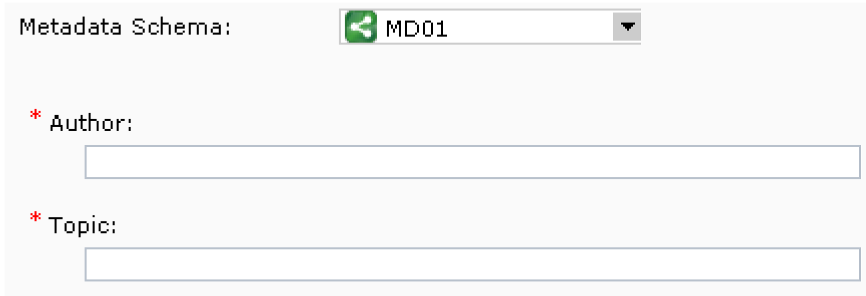
2. Open a Publication, Folder, Virtual Folder, Structure Group, or Page. In the **General** tab, select a **Metadata Schema** from the drop-down list. When you have selected a Metadata Schema, the metadata fields defined by the schema appear. The following image shows a Metadata Schema applied to a Page:




3. Open a Category. In the **General** tab, select a **Default Metadata Schema** from the drop-down list and save the Category:



Open a Keyword in the Category. The default Metadata Schema is applied to child Keywords when created, allowing you to define metadata (note that you may select a different Metadata Schema):




Note: For more information on defining taxonomies, see the implementer's documentation portal.

### Result

To define metadata fields using Keywords, see Adding Keywords to fields (see page 148).

## 12.2 Adding Keywords to fields

You use Keywords to classify your content. Keywords define a classification scheme (visualized as a taxonomy tree) that provides a knowledge map of your data. Applying these Keywords to Component fields or metadata fields allows you to define relationships between content.

### Requirements

You can select the value for a field from a list of Keywords if the Schema field is associated with a Category.

For more information on defining Schemas and Taxonomies (Categories and Keywords), see the implementer's documentation portal.

### Context

The allowed fields in a Component, or the allowed Metadata fields in various Content Manager items, are defined in a Schema. When you create a Component, for example, you must first select a Schema after which the fields defined in the Schema are displayed for that Component. If a Schema field is defined as a *list field* based on a Category, you can choose one or more values from a list of Keywords. A list field may be presented as a drop-down list, select box, radio buttons, check boxes, or tree list.

You can use Keywords to define Component fields or metadata fields for the following:

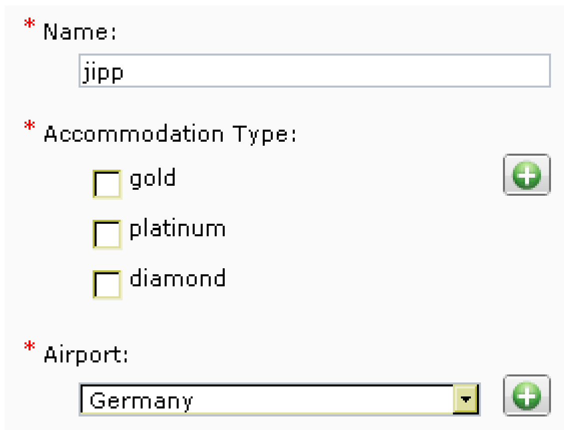
- Component fields (in the **General** tab)

- Component or Multimedia Component metadata fields (in the **Metadata** tab)
- Category and Keyword metadata fields (in the **General** tab)
- Publication, Folder, Virtual Folder, Structure Group, and Page metadata fields (in the **General** tab)

## Steps to execute

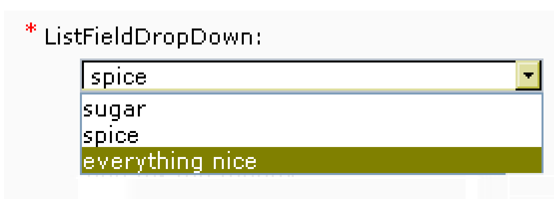
1. Open a Component:
    - In the **General** tab you can define its fields.
    - In the **Metadata** tab you can define its metadata fields.

    The following image shows a Component with fields displaying Keyword list fields (the check boxes and drop-down list):

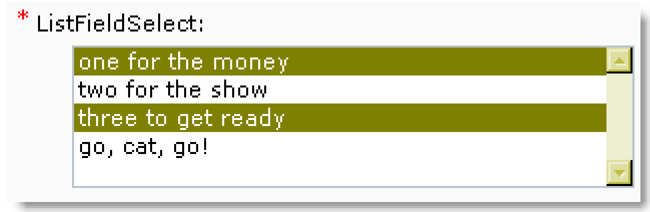
    
    

2. Select a value, or values, for the field from a list of Keywords depending on the type of list displayed:

    a. **Drop-down list**—select a Keyword from the list.

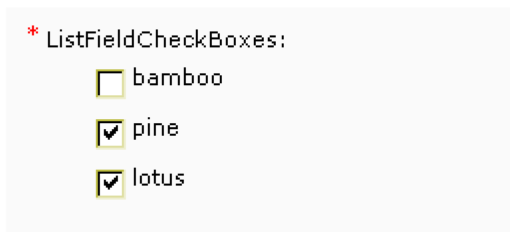
    
    

    b. **Select box**—select a Keyword from the list, or if multiple values are allowed, press Ctrl and select each Keyword you want to add.

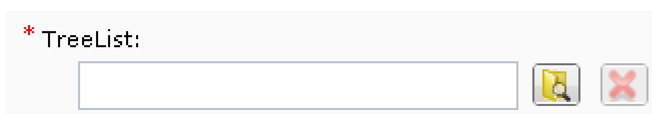



c. **Radio buttons**—select a radio button to choose a Keyword.


d. **Check boxes**—select a box (or boxes if multiple values are allowed) from the list.

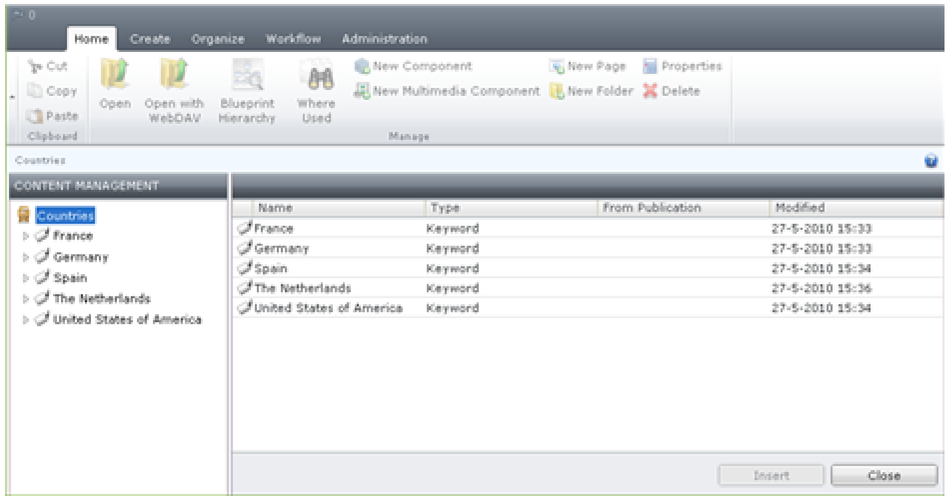



e. **Tree**—click the **Browse** button to add a Keyword.




In the Keyword picker window that opens:

- Select a Keyword and click **Insert** to add the Keyword to the field. Repeat the procedure to add more Keywords if multiple values are allowed.
- Click **Close** to close the window.




Use the area to the left to perform the following actions:

- Drag and drop a field to move the selected Keyword to a new position.
- Click **Remove** to remove the selected Keyword

### Result

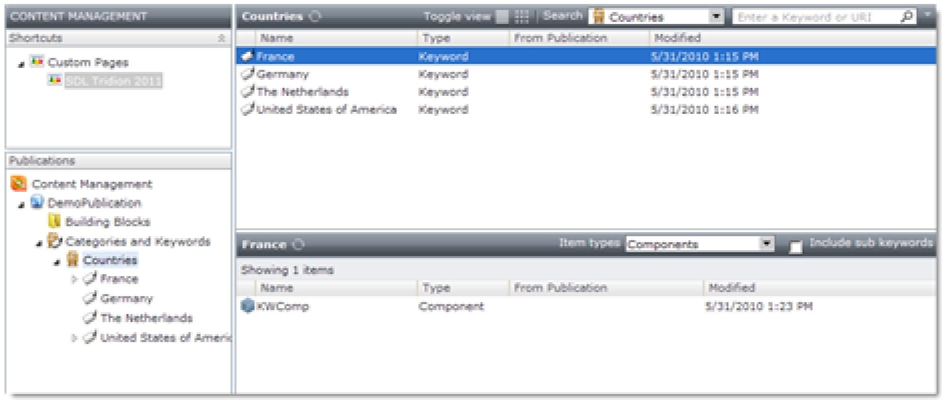
The Keyword value, or values, are added to the field.

## 12.3 Viewing related content

You can select a Keyword to see in which Content Manager items it is being used. The **Classified Items List View** displays the Components, Pages, and other Content Manager items that have been tagged with the selected Keyword, or Keyword branch, allowing you to see related content.

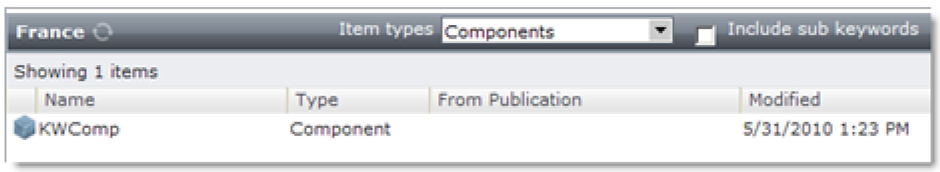
### Steps to execute

1. Open a Publication.
2. Expand the **Categories and Keywords** node and select a Category or Keyword in the navigation pane or list view:




Under the list view the Content Manager displays a list of related content for the selected Keyword and selected filters.

The list is dynamically updated when you select different Keywords:




3. Specify the following search criteria for related content:
   - **Include sub Keywords**—select the check box to retrieve items that contain the selected Keyword and/or child Keywords in its branch; unselect to retrieve items that contain only the selected Keyword
   - **Item types:**—choose one of the following from the drop-down list:
     - `Components`—retrieves Components containing the Keyword
     - `Components and Pages`—retrieves Components and Pages containing the Keyword
     - `All`—retrieves all Content Manager items that contain the Keyword
   - Click the Refresh button after changing the filters to refresh to displayed results.

## Next steps

You can perform most of the standard Content Manager actions on the Components and Pages displayed in the result set:

- Open and edit the item
- Preview the item
- Go to the item's location
- Publish/Un-Publish
- Localize/Un-Localize
- Classify/Reclassify/Unclassify

# Chapter 13 Publishing

You publish Content Manager items to make content available on a Web site. You need to republish items when you update content, or unpublish content when you want to take it offline.

You can publish the following Content Manager items:

- Publications
- Structure Groups
- Pages
- Components
- Multimedia Components
- Categories and Keywords
- Component Templates
- Page Templates

When you publish these items, the Content Manager publishes the following items:

- One or more Pages
- One or more dynamic Component Presentations

Published Pages combine the Page Template and Component Presentations:

- A Page Template determines where, how, and which Component Presentations are rendered and also often includes navigation and branding features
- A Component Presentation combines a Component or Multimedia Component, with a Component Template. The (Multimedia) Component contains the content, while the Component Template determines how and which content from the Component is rendered.

Note: Scripting in the Component Template and Page Template determines the design and content that the Content Manager publishes. You can publish Pages if users created them within publishable Structure Groups. Dynamic Component Presentations differ from embedded Component Presentations in that the Content Manager publishes them to a Content Repository rather than embedding them on a Page. To use dynamic Component Templates, you must use Dynamic Content Delivery. See the implementer's documentation portal for information about configuring publishing settings and Dynamic Content Delivery.

## 13.1 Publishing and republishing items from the Content Manager

You can publish, republish, and unpublish Pages, Components, Structure Groups, Bundles and Publications.

## Context

When you publish a Structure Group, the Content Manager publishes all publishable, nested Structure Groups and Pages.

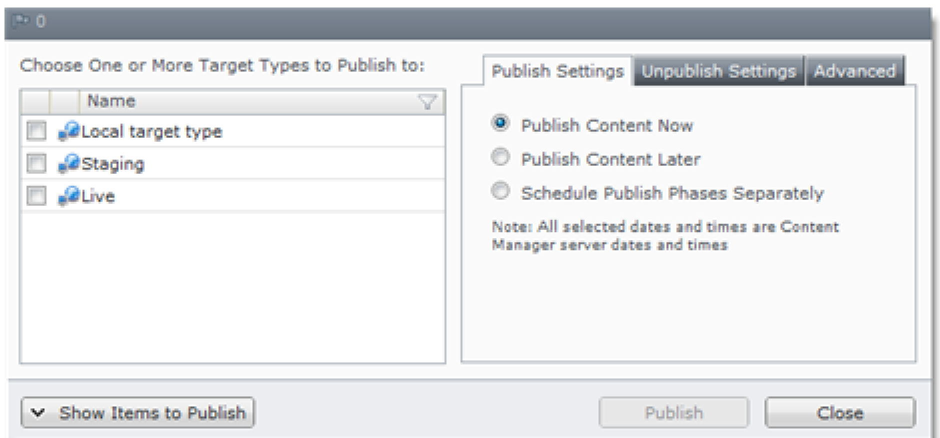
When you publish a Publication, all items in the Publication that can be published are published.

When you publish a Bundle, all items in the Bundle are published.

## Steps to execute

1. Select one or more items in the navigation pane or list view and do one of the following:
   - Click **Publish** in the **Home** tab of the Ribbon.
   - Right-click the selected items and select **Publishing** > **Publish** from the context menu.

   The **Publish** dialog appears, showing the **Publish settings** tab:




2. Select the **Target Types** to which you want to publish content to.

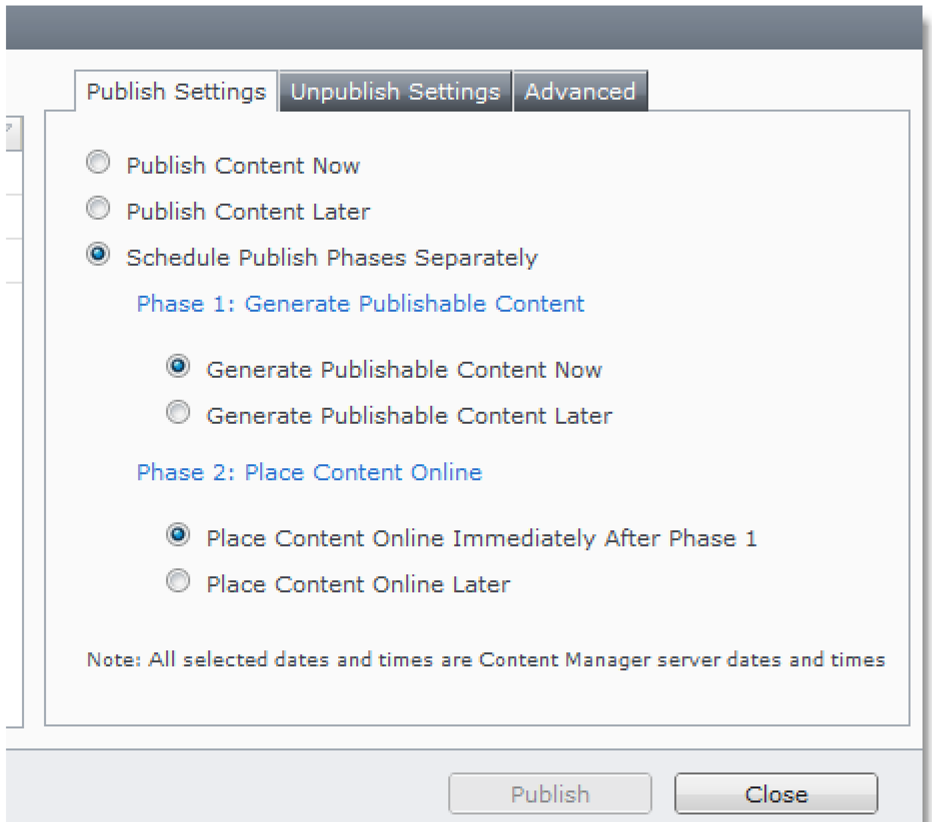
   If you have Target Types for your staging site and for your live site, it makes sense to publish to one but not to both—once content is good enough to go live, it no longer needs to be published to staging.

3. In **Publish Settings**, select when you want the publishing to start.

   You can improve the performance of your system by scheduling non-essential publishing to occur at a later date (say, at night or during weekends).

   - To place your content online as soon as possible, select **Publish content now**.
   - To start the publishing process later, select **Publish content later** and click the calendar button to pick a date and time.
   - To distinguish between the preparation for publishing and the actual placing of content online, select **Schedule the publish phases separately**. This opens a new set of options.

- Select **Generate publishable content later** to start the publishing process at a later date. For example, you may want to postpone this phase because the Content Manager will not be so busy at that time.
- Select **Place content online later** to schedule the time at which content is placed online. For example, if you are publishing your company's quarterly results, you may not want them to go online until a specific date.

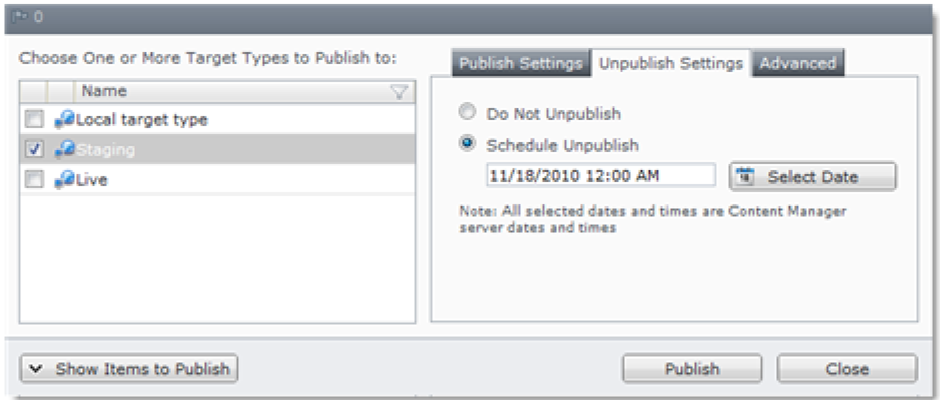



4. If a Publication, Structure Group, Component Template and/or Page Template is among the items you are publishing, you also see an option called **Republish Only (Do Not Publish New Content)**, which is selected by default. When selected, new items in the Publication or Structure Group, and new Templates, are not published.

5. To see which items the Content Manager will publish, click the expand button next to **Show items to publish**. The dialog expands to show the items you selected, as well as any items that depend on it. Click **Hide items to publish** to hide this information again.

6. To configure when this content should be unpublished, click **Unpublish settings** and do one of the following:

   - To unpublish at a later date, select **Do not unpublish**.
   - To schedule unpublishing, select **Schedule unpublish** and click the calendar to pick a date and time.




7. To configure Advanced Publishing options, select the **Advanced** tab.
8. Click **Publish** to start the publishing process.

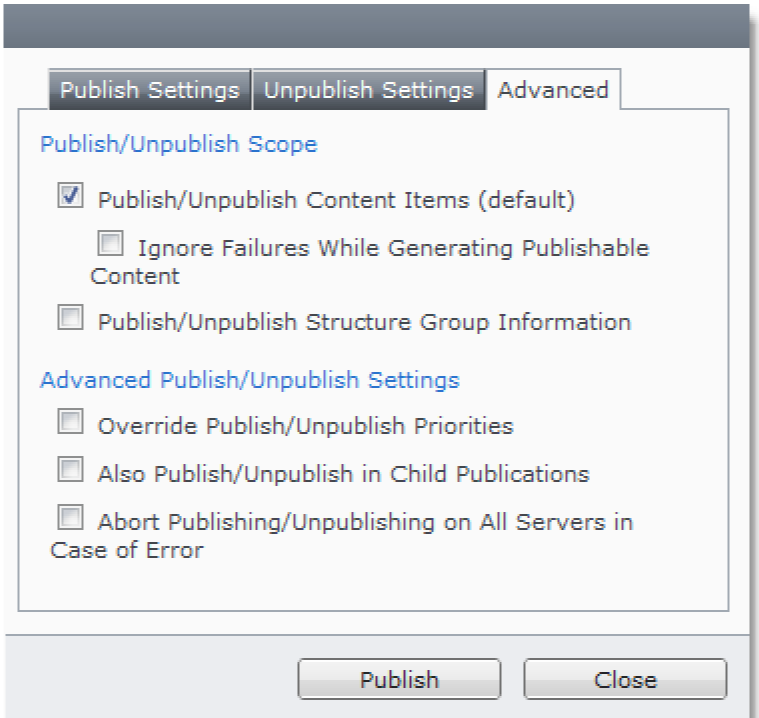
### Result

The content is published/republished.

Important:After you click **OK**, Content Manager remembers all your **Unpublish** dialog settings for the remainder of your browser session; when you close the main Content Manager browser window, all the **Unpublish** dialog settings are restored to their default values. The Content Manager does, however, remember the Target Types selected when you last published content and your **Publish settings** from your previous session.

## 13.2 Advanced Publishing options

The Advanced Publishing options provide you greater control over what and how content is published.




**Publish/Unpublish Scope**

- **Publish/Unpublish Content Items (default)**— (this is the default behavior)
- **Ignore failures while generating publishable content**—to publish content, the Content Manager performs two steps:
  - It generates publishable content (a process known as rendering)
  - It sends the publishable content to the various publish destinations

  When you publish multiple items in one go, then by default, the Content Manager considers the rendering of these items as one closed operation, which fails if any of its parts fails. For example, if you publish a Structure Group containing ten Pages and one of those Pages fails to render, nothing gets rendered. This is not always what you want. For example, your Structure Group may contain a Page that you know contains a mistake, but you may still want to publish all the other Pages in the Structure Group regardless (without having to publish them one by one).

  Another example is the failure to publish a Component because one of the Pages on which the Component appears fails to render. In this scenario, you also do not want the failure of one Page to render to stand in the way of your publishing of your Component.

  To change this behavior of the Content Manager, select the option **Ignore failures while generating publishable content**, then select the maximum number of render failures you want to tolerate in the **Limit number of failures to** option, or clear that option to allow an infinite number of render failures.
- **Publish/Unpublish Structure Group Information**—select to publish/unpublish the Structure Group hierarchy to the Content Delivery side where it is stored as a taxonomy.

### Advanced Publish/Unpublish Settings

- **Override Publish/Unpublish Priorities**—the Target Types you select on the left of the **Publish** dialog represent one or more Publication Targets. Each Publication Target has a publish priority (low, normal, or high). The publish priority determines how quickly an item is entered in the Publish Queue. Use High priority for publish or unpublish actions that are so urgent that they need to bypass the normal publishing queue; Use Low priority if you want to use the available publishing time of your servers without getting in the way of normal work. To change the publish priority of the item(s) you publish or unpublish, select **Override publish/unpublish** priorities and set the publish priority.
- **Also publish/unpublish in Child Publications**—to publish or unpublish items in the Child Publications of the current Publication, select **Also publish/unpublish in Child Publications**. For more information about Child Publications and BluePrinting in general, refer to BluePrinting (see page 53).
- **Abort publishing/unpublishing on all servers in case of errors**—the Target Types you select on the left of the Publish dialog represent one or more Publication Targets. In its turn, each Publication Target represents one or more destinations, that is, physical publish locations such as an FTP site, a URL or a network folder. Very often, the destinations in a Publication Target represent a cluster of machines, meaning that if one of the machines is unavailable or slow, the Web site automatically switches to one of the other machines. For this purpose, it is vital that all machines (destinations) within such a Publication Target contain the exact same content. This means, in turn, that if publishing to one machine in the cluster fails, you want the Content Manager to stop or undo all publish actions to the other machines in the cluster. Select Abort Publishing on all severs in case of errors to accomplish this. When in doubt, ask your Publication Manager if you should switch this option on for the Target Type(s) you selected.

  Important:Selecting this option does not mean that failure to publish to one Publication Target has any effect on any other Publication Target. Similarly, selecting this option does not mean that failure to publish to one Target Type has any effect on any other Target Type.
- **If possible, publish the in-workflow version of an item**—one or more of the items that you are publishing may be in workflow. If an item is in workflow, it may have reached a point where it has become publishable to one or more of the Publication Targets to which you are publishing. But by default, this in-workflow version will not be published. Rather, the last major version of the item will be published. By selecting this option, you override this default behavior, and the in-workflow version will be published to a Publication Target if it has become publishable to that Publication Target.

## 13.3 Unpublishing items from the Content Manager

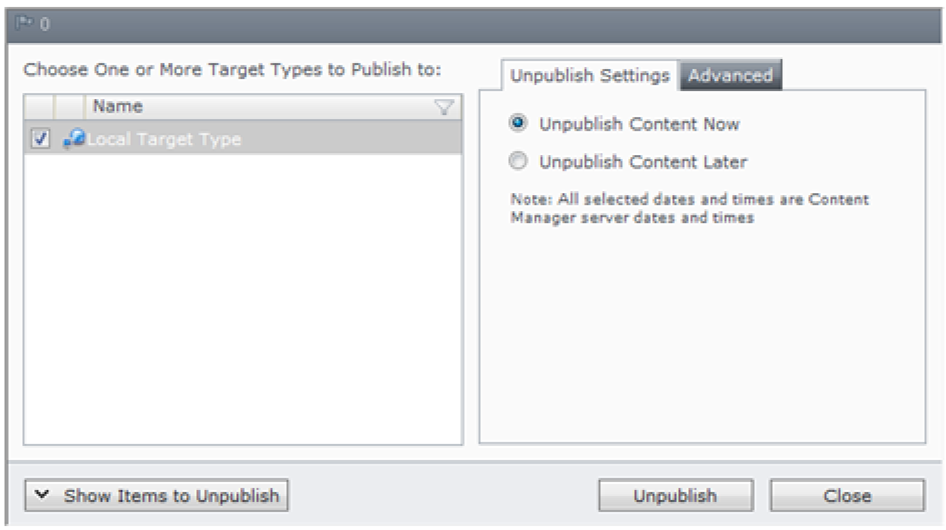
You need to unpublish content to take content offline. Visitors will no longer be able to view the unpublished content.

### Steps to execute

1. Select one or more items in the navigation pane or list view and do one of the following:

   - Click **Unpublish** in the toolbar .
   - Right-click the selected items and select **Publishing** > **Unpublish** from the context menu.

   The **Unpublish** dialog appears, showing the **Unpublish settings** tab.

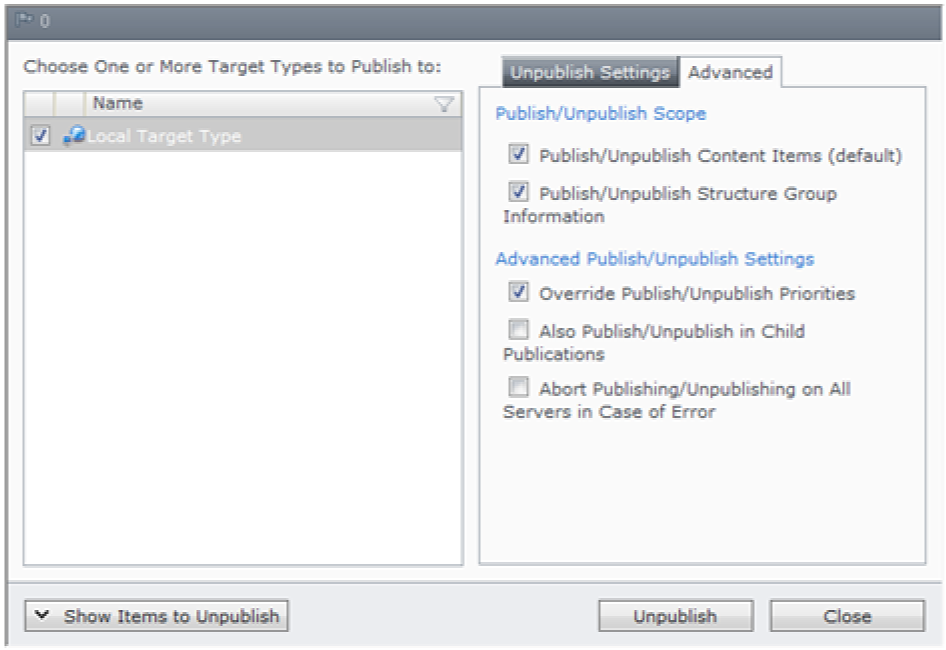
   
   

2. Do one of the following:

   - If you want to unpublish the content now, leave the setting set to **Unpublish content now**.
   - If you want the content to be unpublished later, select **Unpublish content later** and use the calendar to pick a date and time.

3. To see which items the Content Manager will unpublish, click the expand button next to **Show items to unpublish**. The dialog enlarges to reveal the items you selected, as well as any items that depend on it.

4. If you want to configure advanced unpublishing settings, click **Advanced**. The **Advanced** tab appears. For more information, see Advanced Publishing options (see page 156):




5. Click **OK** to start the unpublishing process.

### Result

The content is unpublished.

Important:After you click **OK**, Content Manager will remember all your **Unpublish** dialog settings for the remainder of this session. This means that next time you open the **Unpublish** dialog, it shows all the settings as you configured them the previous time. When you close your main Content Manager browser window, all the **Unpublish** dialog settings are restored to their default values.

## 13.4 Viewing the publish queue

The Publish Queue lists all publish transactions that users have scheduled for publishing actions (publish or unpublish) and publish transactions that have been successfully published and those that have failed. You can filter the items shown in the Publishing Queue or view individual publish transactions.

### Requirements

To view the publish queue, you must have Publish rights for at least one Publication.

### Context

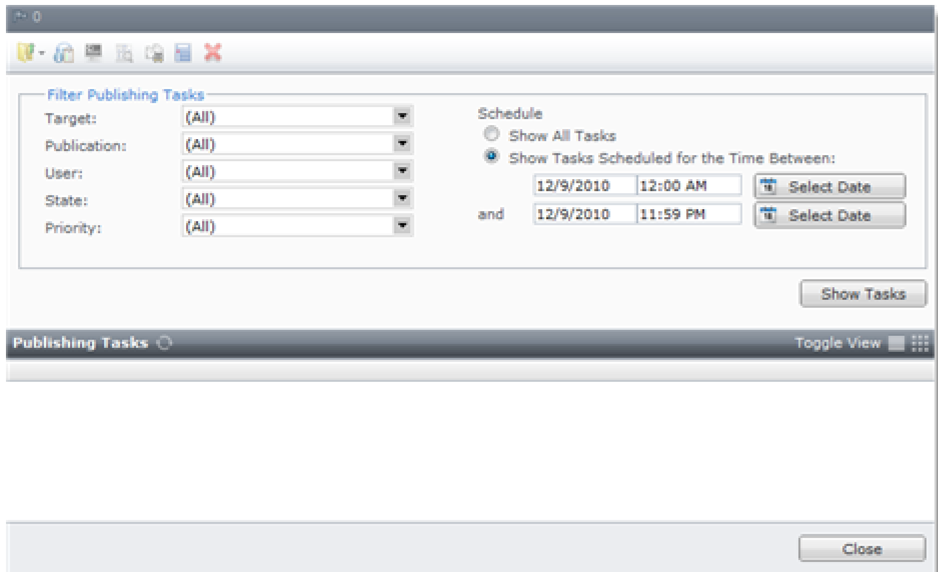
Note: The Publish Queue is purged on a regular basis, based on the configuration of the Content Manager.

## Steps to execute

1. To access the Publishing Queue, click the **Publishing Queue** button in the **Home** tab of the Ribbon in the main screen or in any item dialog.

   A **Publishing Queue** dialog opens.


2. Do one of the following:

   - To view all scheduled publish transactions, click **Show Tasks**.
   - To filter the results, set one or more parameters and then click the **Show Tasks** button.

     You can filter publish queue items on the following criteria:

     **Target**

     The Target Type to which the item has been submitted for publishing or unpublishing

     **Publication**

     The Publication from which the Content Manager published the item

     **User**

     The User that performed the publish action

     **State**

     The publish state of the transaction

     **Priority**

     The priority of the transaction

     **Schedule**

If selected, a date range within which the publish or unpublish action is supposed to take place.

### Result

The Content Manager Explorer displays a list of publish transactions. You can also filter the displayed list using the arrow button that appears next to the columns in the list.

## 13.5 Cancelling a publish transaction

The Publish Queue lists all publish transactions that users have scheduled for publishing actions (publish or unpublish) and publish transactions that have been successfully published and those that have failed. You can cancel a scheduled publish transaction if the transaction is not in progress. When you cancel a transaction, the Content Manager removes it from the publish queue.

### Requirements

To cancel a publish transaction you must be either the system administrator or the initiator of the transaction.

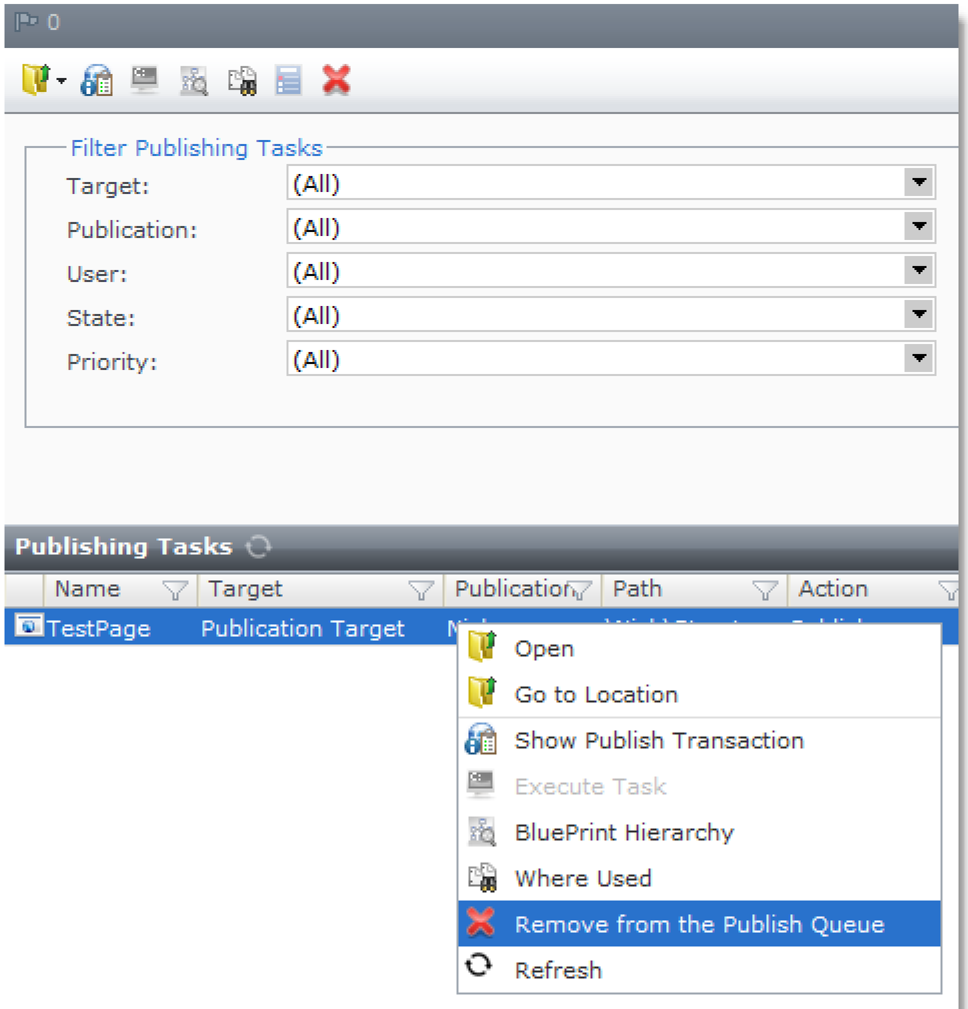
To cancel a publish transaction that is In Progress, you must have system administrator privileges.

### Context

Note: The Publish Queue is purged on a regular basis, based on the configuration of the Content Manager.

### Steps to execute

1. Select the transaction you want to cancel from the Publish Queue and choose **Remove from the Publish Queue** in the context menu:




## Result

The Content Manager removes the transaction from the Publish Queue and cancels the transaction.

# Chapter 14 Versioning

When you modify and save an item of a certain type, Content Manager creates a new version of the item. The "current version" of an item is the most recently checked-in version. You can also explicitly check out the current version of an item for your exclusive use. When you have an item checked out, other users can view the item, but they cannot edit the item.

## 14.1 Content Manager items that have versions

Only some types of Content Manager items are versioned.

Content Manager keeps track of earlier versions of the following types of items:

- Component
- Component Template
- Page
- Page Template
- Template Building Block
- Schema

## 14.2 About version numbers

When you create an item, the Content Manager gives it a version number of 1.0 when you check that item in. The Content Manager subsequently gives items a new version number every time you save.

A version number can consist of a major version number and a minor version number:

- **major version**—if a user saves an item, and the item is checked-in, the major version number increases by 1.
- **minor version**—if a user saves an item that is checked out or is in Workflow, the version number increases by 0.1 each time it is saved. When a checked-out item is checked in or when an item in Workflow completes a workflow process, the version number increases to the next whole number. For example, if a checked-out Component has a version number of 2.3, and the Component is checked in, the version number increases to 3.0.

If, for example, an item has a version number of 2.3, "2" is the major version number and ".3" is the minor version of the item.

# 14.3 Version history

The Version History List lists all versions of a Component, Component Template, Page Template, Page, or Schema. In the Version History List you can view a version, compare two versions, roll back to a previous version, or delete a version.

## 14.3.1 Viewing the version history list

You can view the version history list of an item to view the list and to perform actions on versions of items.

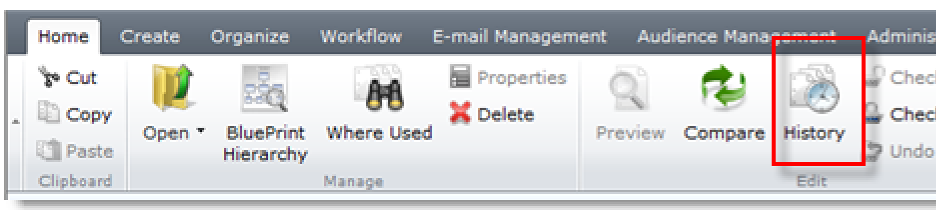
### Requirements

To view the version history list, you must have Read permissions to the Folder or Structure Group that contains the item.

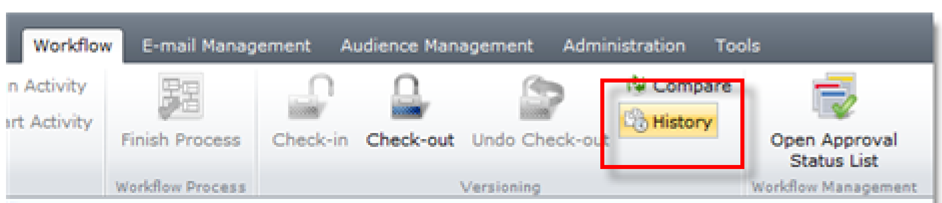
### Steps to execute

1. To view the Version History list, navigate to the location of the item for which you want to view the Version History list.

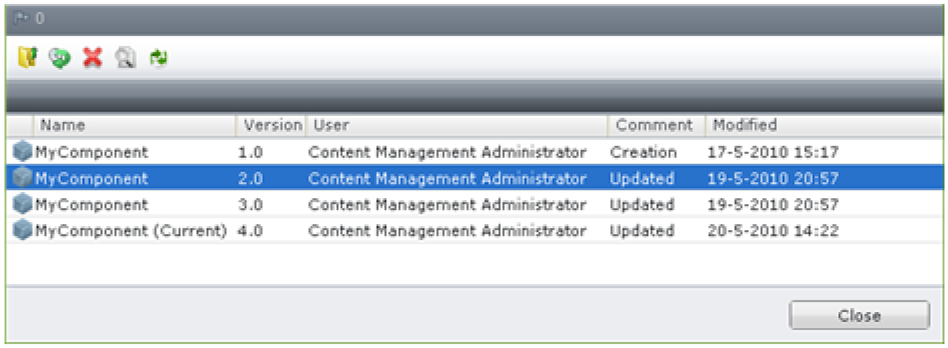
2. In the list view, select the item and then do one of the following:
   - Click **History** in the **Home** tab of the Ribbon.




   - Click **History** in the **Workflow** tab of the Ribbon.




The **Version History** list appears.




### Result

You can perform the following tasks from the Version History List:

- Viewing a version
- Comparing two versions
- Rolling back to a previous version
- Deleting a version

## 14.3.2 Viewing a version

You can view an item from the Version History list in read-only mode.

### Steps to execute

1. Access the Version History List.
2. From the Version History list, do one of the following:
   - Double-click on an item
   - Right-click on an item and select **Open** from the context menu.

### Result

The item opens in read-only mode.

## 14.3.3 Comparing two versions

You can compare two versions of an item to view the changes made.

### Requirements

To compare versions of an item you must have rights to view the item and read permissions.

### Context

You can compare two different versions of the following types of items:

- Components
- Multimedia Components
- Component Templates
- Pages

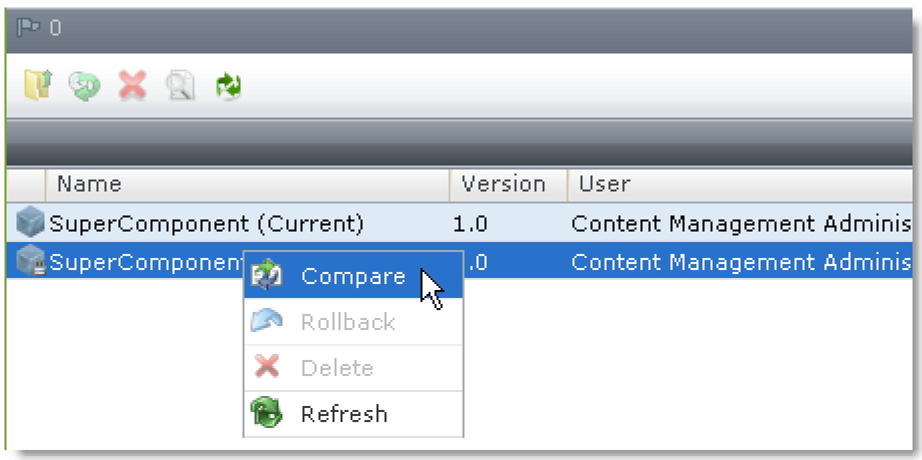
- Page Templates
- Schemas
- Template Building Blocks

When you compare versions, a Compare pane appears that highlights the differences between the two versions:

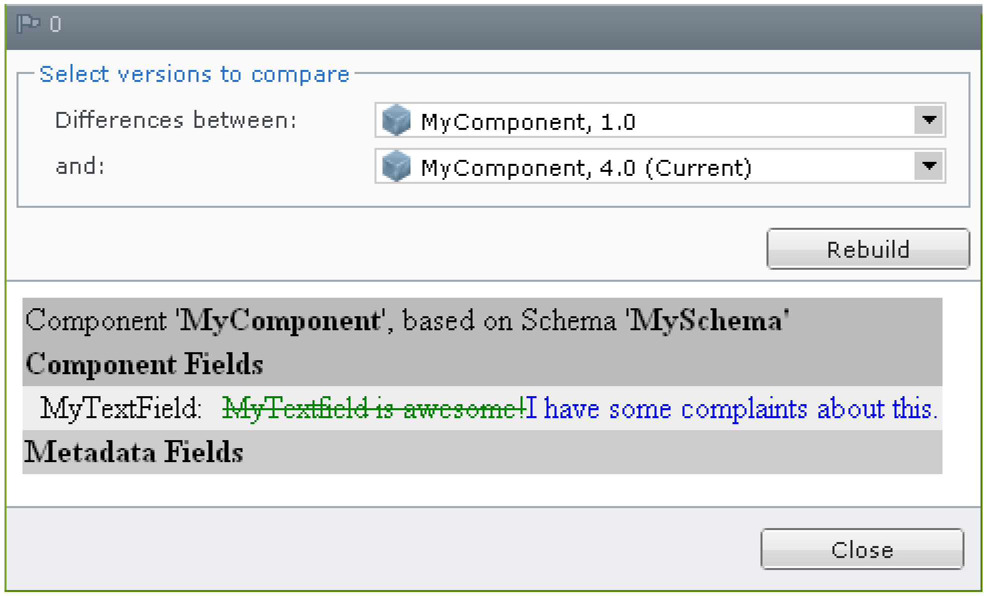
- New text appears in Blue.
- Deleted text appears in Green Strikethrough.
- Red underlined text is a changed Component or Multimedia Link.
- You can compare any two versions.

## Steps to execute

1. Access the Version History List.
2. In the Version History List, select two items. To select non-concurrent items, select one item, press the **Ctrl** key on your keyboard, and select a second item.
3. Click the **Compare** icon from the toolbar, or right-click and select **Compare** from the context menu.




4. Click the **Compare Versions** button. The Comparison pane displays a comparison of the two versions.




Note: When you compare two versions of a Component, the Content Manager uses the default Component Template for the current Publication to render the differences. As a result, Component content that is not rendered by this template will not be compared.

### Result

You have compared two versions of a Content Manager item.

## 14.3.4 Rolling back to a previous version

Rollback allows you to create a new version based on a previous version, which then becomes the current version, or select a previous version as the current version and delete all versions created after it.

### Requirements

To rollback to a previous version of an item you must have rights for the item you want to rollback (for example, Component Management rights) and write permissions for the containing Folder or Structure Group. It is not possible to rollback if the following conditions apply:

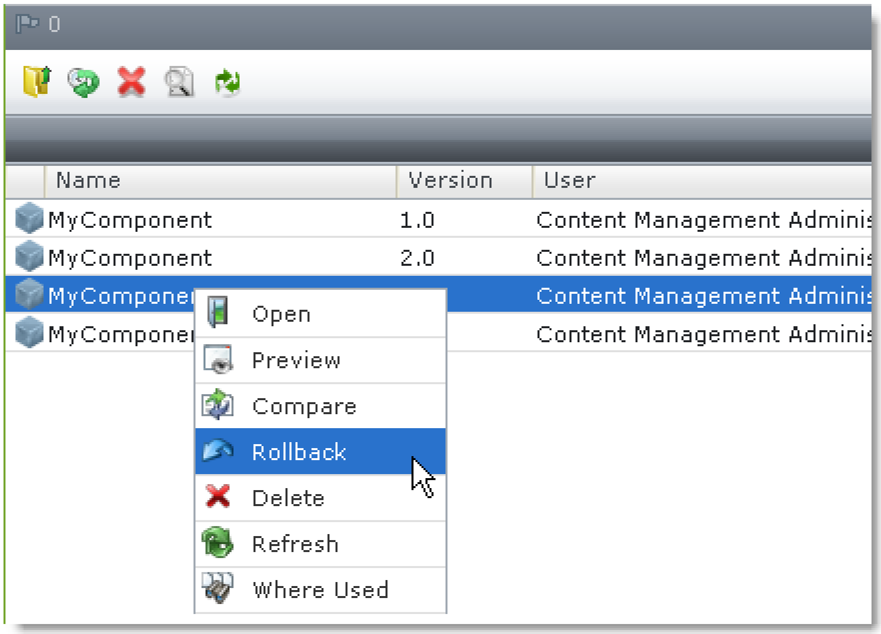
- the item is a shared item
- the item is checked-out
- the item is in Workflow
- only one version of the item exists

### Context

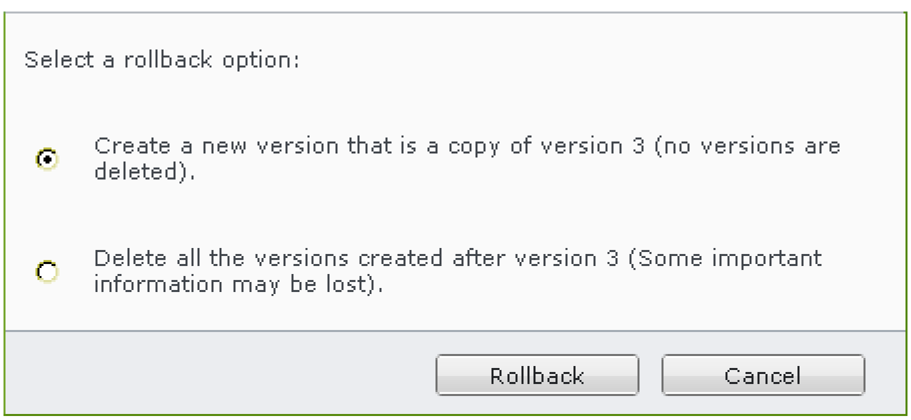
Note: If you select a previous version as the current item, all subsequent versions are deleted and irretrievable.

## Steps to execute

1. Access the Version History List.
2. In the Version History List, select the version to which you want to rollback.
3. Right-click and select **Versioning > Rollback** from the context menu.




4. In the pop-up that appears, select one of the following choices:
   - To create a new version based on the selected item, select the first option and click **OK.**
   - To delete all versions after the selected version, select the second option and click **OK.**




## Result

You have rolled back to a previous version of an item.

Note: If the item has an associated Workflow, rolling back to the item may start a Workflow Process depending on the configuration of the Content Manager.

## 14.3.5 Deleting a version

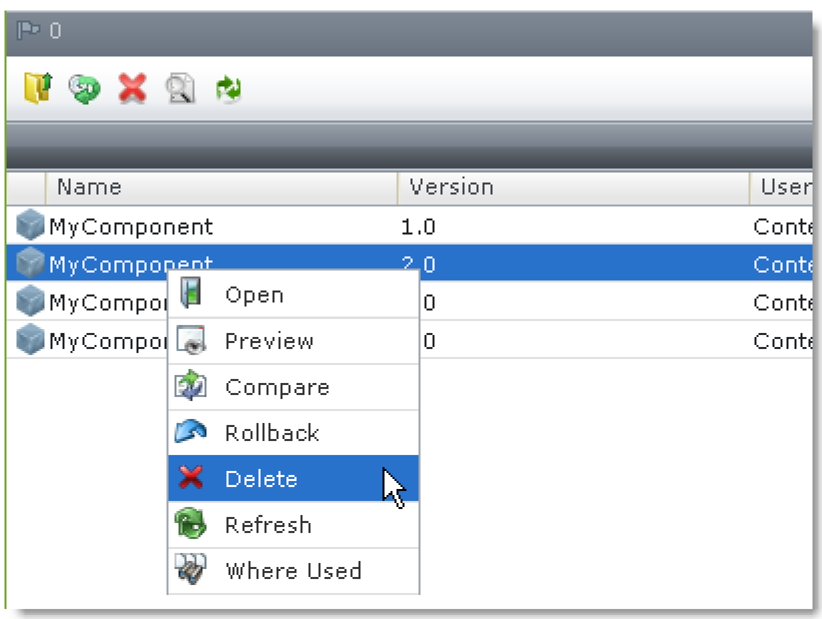
You can delete one or more versions from the Version History list, but you cannot delete the last version or the current version of an item.

### Requirements

To delete an item you must have rights for the item you want to delete, and you must have delete permissions for the Folder or Structure Group in which the item is stored.

### Steps to execute

1. Access the Version History List.
2. In the Version History List, select the version or versions you want to delete.
3. Right-click and select **Delete** from the context menu.



### Result

You have deleted a version of an item.

## 14.4 Check-in and check-out

Check-out allows users to lock an item so that it cannot be edited by anyone other than the user who checked it out. You can check out and check in an item implicitly or explicitly.

When you (implicitly or explicitly) check out an item, the item is locked and appears in your **Checked-out Items**. Only you can edit the item while it is checked out. When you check in an item. It then becomes available to other users again.

If you publish an item, only the current related items (Page, Component, Page Template, Component Template) are published. That is, if items are checked out, only the last checked-in item (the Current item) is published.

**Opening an item that is not subject to workflow**

If you open and modify an item, the item is checked out to you, and locked, while you modify it. Every time you save the item without closing it, you increase its minor version number (for example, from 6.0 to 6.1). When you eventually close the item, the system unlocks it and checks it back in, increasing its major version number (for example, from 6.0 to 7.0).

**Explicitly checking out an item that is not subject to workflow**

If you explicitly check out an item, the item is checked out to you, and locked, until you explicitly check it back in. Every time you save the item (whether you close the item or not), you increase its minor version number (for example, from 6.0 to 6.1). When you eventually explicitly check the item back in, the system unlocks it and its major version number increases (for example, from 6.0 to 7.0).

**Opening an item that is subject to workflow, but has not started its Workflow Process yet**

Items in a Bundle may be subject to workflow, but may at the same time not be in a Workflow Process yet. Opening such an item checks it out to you and locks it in your name. Saving it, with or without closing it, increases its minor version. Closing it puts it in a *reserved* state: that is, it is still checked out but locked by no user.

**Explicitly checking out an item that is subject to workflow, but has not started its Workflow Process yet**

Items in a Bundle may be subject to workflow, but may at the same time not be in a Workflow Process yet. Explicitly checking out such an item locks it in your name. Saving it, with or without closing it, increase its minor version. Explicitly checking it back in puts it in a *reserved* state: that is, it is checked out but locked by no user.

**Starting workflow on a single item by creating it, or editing it after the previous Workflow Process has finished**

A user can start workflow on an item by creating or reediting the item if it is subject to a single-item Workflow Process. This action does not change the major or minor version of the item in any way, but it does check the item out to the user who created or reedited it, and locks it.

### Starting workflow on an item that is part of a Bundle

A user can start workflow on an item in a Bundle by putting the Bundle that contains it into workflow (if the Bundle is subject to a Bundle Workflow Process). This action does not change the major or minor version of the item in any way, nor does it change its checked-out status or lock status.

### Starting a Workflow Activity

If a user starts an Activity, all items associated with that Activity are checked out to that user, if the user has read access to all of those items. The user can now modify the item(s) and finish the Activity. Alternatively, if the user does *not* have read access to all of the items, that user cannot modify *any* of the items, nor finish the Activity, but can only reassign the Activity.

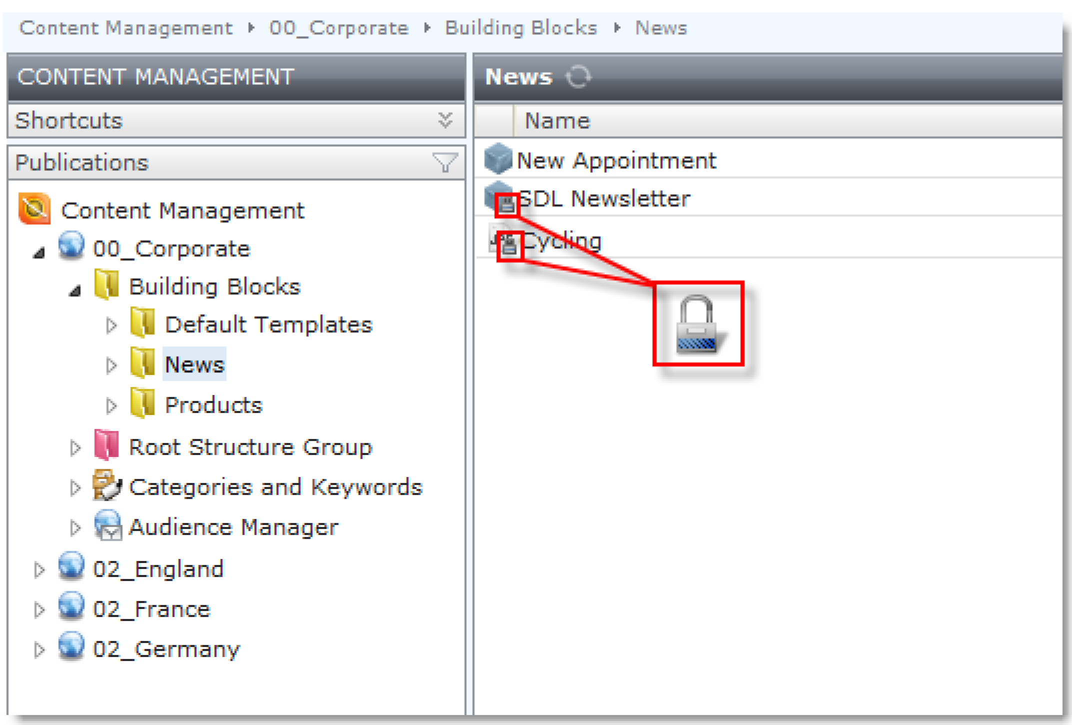
### Finishing a Workflow Activity

If a user finishes an Activity, all items associated with that Activity increase their minor version and remain checked out, but they now become locked by no user. The items are in a *reserved* state.

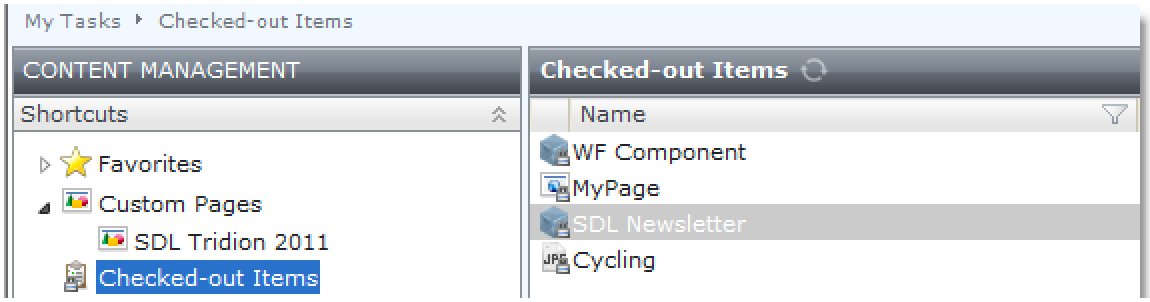
### Finishing a Workflow Process

If an item exits workflow (that is, finishes its Workflow Process), it is checked in as a new major version. Any locks on it are released.

While an item is checked out, the item icon is displayed with a small image of a lock over it.



It also appears in the Checked-out items list of the User who (implicitly or explicitly) checked it out.




## 14.4.1 Checking out an item

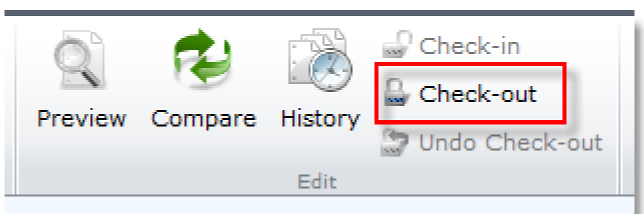
You can check out a checked-in item for your exclusive use.

### Requirements

To check out an item, you must have rights for the item and write permissions. It is not possible to check out an item that is in Workflow, that is already checked out, or that is a shared item.

### Steps to execute

1. To check out an item, access the Folder or Structure Group in which the item is stored.
2. Select the item you want to check out and in the **Home** tab of the Ribbon, click **Check out**.




### Result

The item is checked out. Only the user to whom the item is checked out can edit the item.

While an item is checked out, all items that use the item do not use the checked out version. Instead, the last checked-in version is used. If an item is checked out through Workflow, the in-workflow version can be published only if it meets minimum approval status. When an item is checked out, it is not possible to perform the following actions on the item:

- Delete
- Cut & paste
- Unlocalize the item if it is a local copy
- Rollback

BluePrinting—when an item is checked out in a Parent Publication, the Child Publication shares the last checked-in version of the item.

Version number—while the item is checked out, the minor version number increases by 0.1 each time the item is edited and saved.

Workflow—if an item has an associated Workflow, the item will enter the Workflow Process the first time it is edited and saved.

Publishing—if an item is checked out through an edit action or through an explicit check-out, the current version, not the checked-out version of the item is published. If an item is checked out through a Workflow process, it can only be published if it meets minimum approval status, otherwise, the current version is published.

## 14.4.2 Checking in an item

You can check in an item that you have checked out.

### Requirements

To check in an item, you must have rights for the item and write permissions for the containing Folder or Structure Group.

### Context

The check-in action does not apply to items that are checked out through a Workflow Process. Items in Workflow are checked in after the last activity in the associated Workflow Process is completed.

### Steps to execute

1. To check in an item, access the Folder or Structure Group in which the item is stored.
2. Select the item you want to check in and in the **Home** tab of the Ribbon, click **Check in**.


### Result

The item is checked in and becomes the current version of the item. Other users can now open and edit the item. All items that use this item now use the checked in version of the item.

BluePrinting—in any Child Publications that use the shared item, the shared version is the checked-in version.

Version number—the version number increases to the next whole number. For example, if the checked-out version number was 1.8, the checked-in version number is 2.0.

### 14.4.3 Undoing check-out

You can perform undo check-out to discard the changes you have made to an item that you have checked-out. The previous version of the item remains the current version.

#### Requirements

You can undo check-out if you checked out the item. It is not possible to undo check-out for an item that is in Workflow.

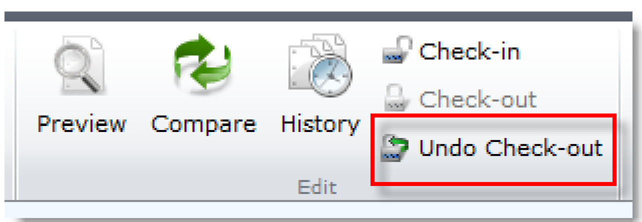
#### Context

Important:If you undo check-out, you will lose any changes that you made to the Component or Page after checking it out.

#### Steps to execute

1. To undo check-out on an item, access the Folder or Structure Group in which the item is stored.

2. Select the item for which you want to undo the check-out and in the **Home** tab of the Ribbon, click **Undo check-out**.




## 14.5 Non-checked-in items

A non-checked-in item is a new item that has been created but not yet checked in.

The status of a new item that has been created but not yet checked in is slightly different to that of an item that has been checked in: when you create an item and check it in, the Content Manager gives it a version number of 1.0. Only then is the item fully accessible for linking, publishing, viewing, and editing purposes. Until then, only the owner can view the content (by opening or previewing the item). For other users (and the owner) the "non-checked-in" item, in workflow or otherwise, is visible in the following lists:

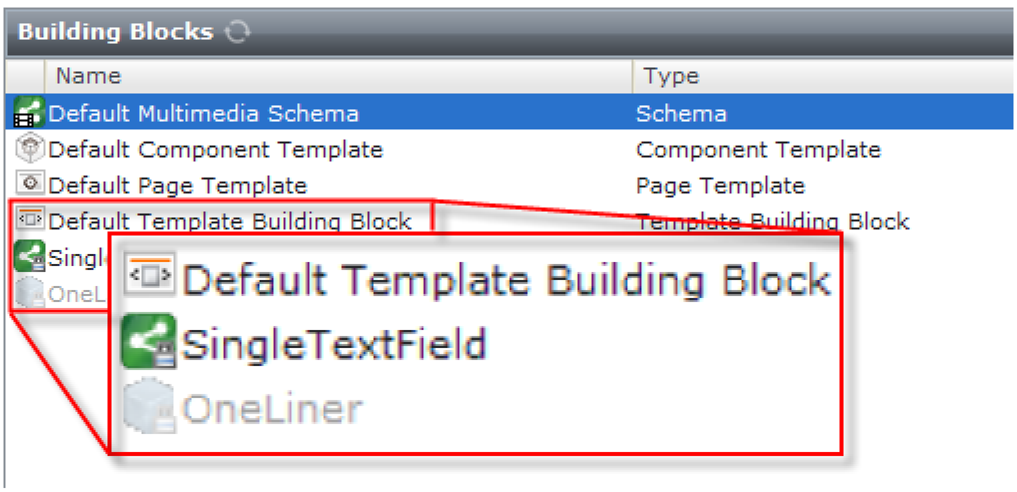
- The **Items List** (the main dialog)

- The **Protocol Schemas**
- The **Where used List**
- The **Checked-Out Items List**
- The **History List**
- The **Started List** (only for items in Workflow, and only for the owner)

Each time you save the item, a minor version number is applied, for example 0.1, 0.2, and so on. The owner of an non-checked-in item can perform all the usual actions on the item except cut/paste/copy and publish. Note also that you cannot publish newly created items in workflow from Building Blocks until they are checked-in.

Other users can only view the non-checked-in items in the lists described above; lists in the Content Manager Explorer that are used to link to other items do not show non-checked-in items because data cannot be rendered.

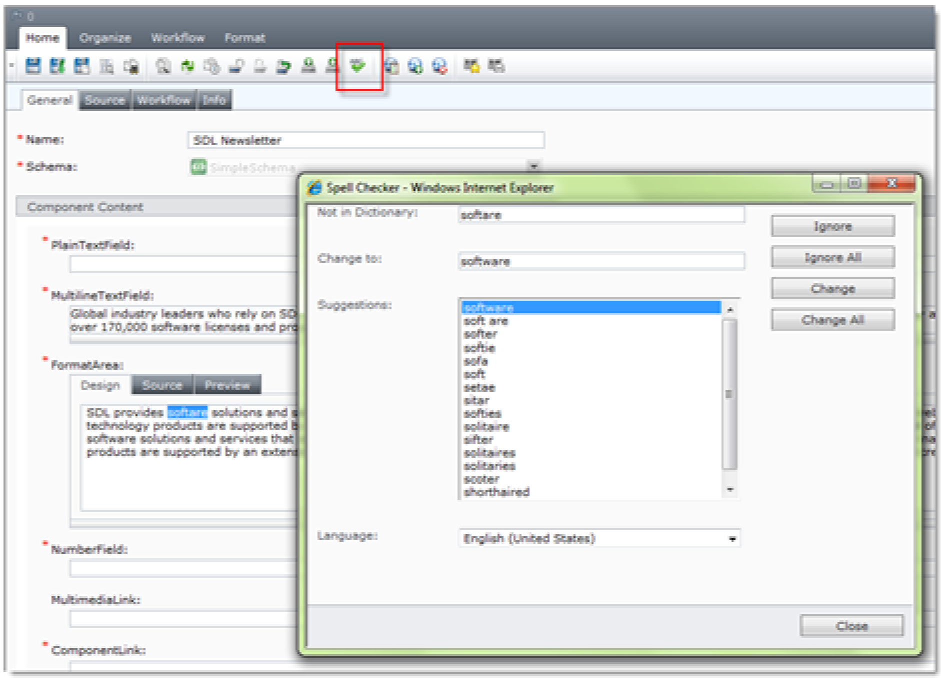
A "non-checked-in item" is shown as translucent in the Content Manager Explorer. To illustrate this, the following image shows three Components; a Component that has been checked-in, a Component that has been checked out, and a non-checked-in Component:




Important:Non-checked-in items apply to items that support versioning, namely: Schemas, Components, Component Templates, Page Templates, Pages, and Template Building Blocks. Non-checked-in items are not visible in WebDAV.

# Chapter 15 Spellchecker

The SpellChecker allows you to spell check the text fields and formattable text fields of Components and Component metadata, and Publication, Structure Group, Folder, Virtual Folder, and Page metadata




## Supported languages

You can spell check content in the following languages:

- American, British and Canadian English
- Brazilian Portuguese
- Danish
- Dutch (includes the "new spelling")
- Finnish
- French (contains both European and Canadian spelling)
- German (includes spelling reform)
- Italian
- Norwegian (Bokmål dialect)
- Portuguese (Iberian)
- Spanish (contains European, Mexican, and South American words)
- Swedish

## 15.1 Spell check a Component

You can spell check all text fields and metadata text fields in a Component. It is not possible to spell check values in date fields, number fields, link fields, or list fields.

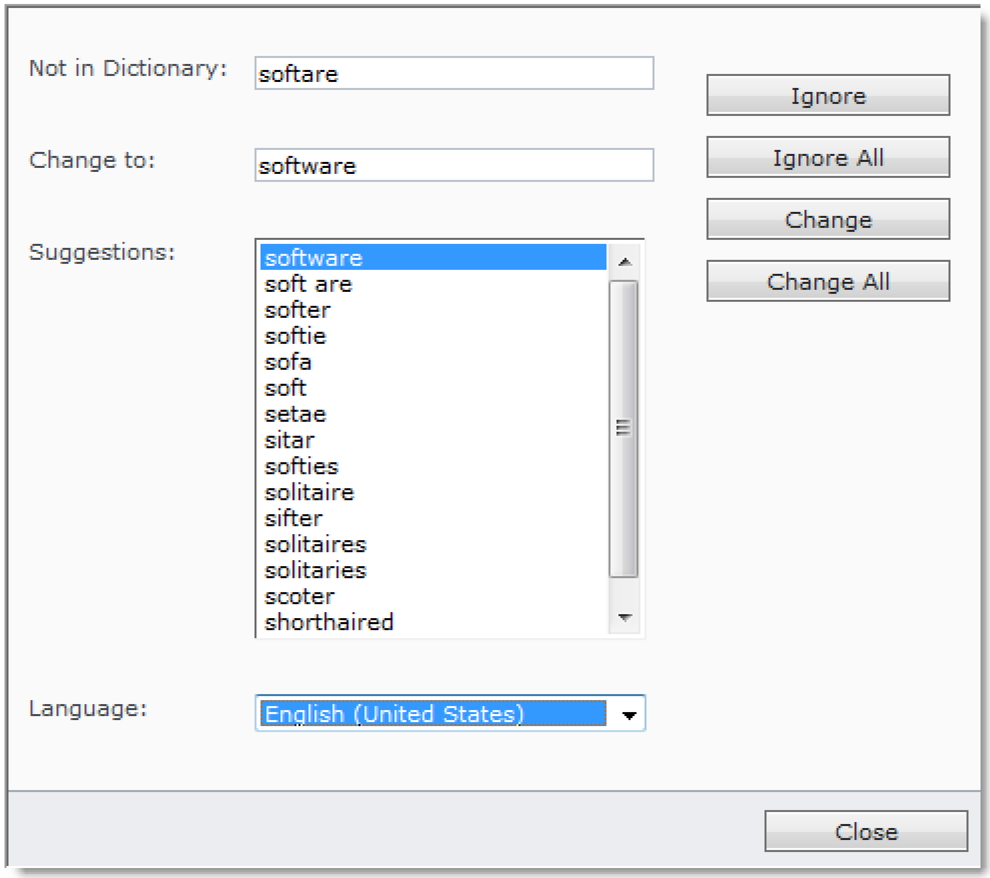
### Context

Note: The SpellChecker does not check both the content of the **General** tab and **Metadata** tab at the same time. If you want to check the spelling in both areas, you must perform the spell check one tab at a time.

### Steps to execute

1. To spell check a Component, open a Component and select the **General** tab.
2. Click the **Check Spelling** button on the editing toolbar. 

   The SpellCheck pop-up appears. If errors are found, the word is highlighted in the Component and the SpellChecker offers suggested alternate spelling.




If there are no errors, the popup displays a message indicating that the spell check is complete.

3. If necessary, you can change the default language of the spell check using the Language options.

Note: If you change the default language during a spell check, the SpellChecker rechecks the spelling using the selected language, including any previously checked words. When you specify a language, the SpellChecker remembers the selected option when spell checking another item in the same browser session. For example, if you spell check a Component and check the spelling of the Component in German, then open another Component and spell check, the default spell check language will be German. If you close your browser, the language will be reset to the default spell check language.

4. For each detected error, you can use one of the following options:
   - **Ignore**: ignore the detected error and continue checking
   - **Ignore all**: ignore the detected error every time it appears in a text field in this Component
   - **Change**: use the default suggestion in the **Change To** field, select the suggestion that applies to the detected error, or type in your own spelling and click the **Change** button to change the detected error
   - **Change all**: use the default suggestion in the Change to field, select the suggestion that applies to the detected error, or type in your own spelling, and click the Change button to change the detected error every time the spell checker finds the word

   The word that appears in the **Change To** field is used to replace the spelling error.

5. (Optional) If you wish to spell check metadata text field values, select the **Metadata** tab and repeat steps 2 to 4.

6. Click the **Close** button.

### Result

You have spell-checked a Component.

## 15.2 Spell check metadata fields

You can spell check the contents of text and formattable text fields within the metadata fields of Publications, Structure Groups, Folders, Virtual Folders, and Pages. It is not possible to spell check values in date fields, number fields, link fields, or list fields.

### Context

Note: When you spell check these items ONLY the metadata fields are spell checked. The SpellChecker will not spell check any item information other than the metadata fields.

## Steps to execute

1. To spell check a Publication, Structure Group, Folder, Virtual Folder, or Page metadata, open the item for which you want to spell check metadata.

2. Click the **Spell Check** button on the toolbar.

3. If necessary, you can change the default language of the spell check using the **Language** options.

   Note: If you change the default language during a spell check, the SpellChecker rechecks the spelling using the selected language, including any previously checked words.

4. For each detected error, you can use one of the following options:

   - **Ignore**: ignore the detected error and continue checking
   - **Ignore all**: ignore the detected error every time it appears in a text field in this Component
   - **Change**: use the default suggestion in the **Change To** field, select the suggestion that applies to the detected error, or type in your own spelling and click the **Change** button to change the detected error
   - **Change all**: use the default suggestion in the Change to field, select the suggestion that applies to the detected error, or type in your own spelling, and click the Change button to change the detected error every time the spell checker finds the word

   The word that appears in the **Change To** field is used to replace the spelling error. Once the spell check is complete, the following window appears.

5. Click the **Close** button once you have finished spell checking.

## Result

You have spell-checked metadata fields of a Publication, Structure Group, Folder, Virtual Folder, or Page.

# Chapter 16 Search

Search for Content Manager items by entering search input. Your search input can contain words that occur in the items; operators; or a Content Manager URI (a unique identifier for a Content Manager item). You can also specify where to search, in which time period to search, how many results to return, and so on.

You can search the Content Manager for the following types of items.

- Folders
- Structure Groups
- Schemas
- Keywords
- Components
- Multimedia Components
- Component Templates
- Pages
- Page Templates
- Categories
- Template Building Blocks
- Virtual Folders
- Bundles
- Target Groups

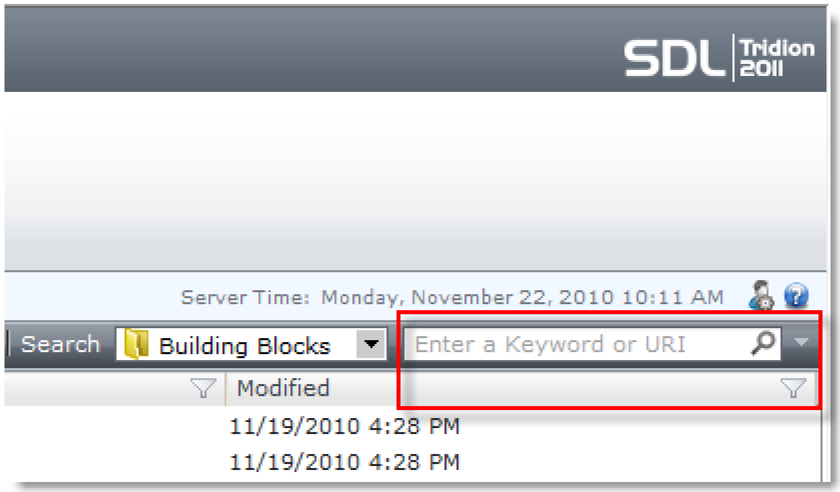
## 16.1 Basic search

You can use the basic search interface to quickly search Content Manager for a word of phrase.

### Steps to execute

1. Access Content Manager Explorer.

2. In the top right area of the screen, fill in a word or phrase in the input box that reads "Enter a Keyword or URI" and click the magnifying glass to execute the search. To search in a specific location (and in its subcontainers), you can select a search location from the dropdown to the left of the input box.




Note:

Note the following:

- Instead of a simple phrase, you can add wildcards and operators to your search input, or enter a Content Manager URI, that is, a unique identifier of an item.
- By default, search searches in the node that is currently displayed in the content area below, and in all of its subnodes. You can pick a number of different locations from the dropdown location to the left of the input box, or select any location in the Advanced search area. Note, however, that if you search across all Publications (the value **All Publications** in the dropdown), shared items are not included in the search results.

The search runs and shows results in the area below.

### Result

If the list view reads, **Loading...**, the Content Manager is performing the search. During this time, search is disabled. If it finds no results, the message **There are no items in this view** appears.

Important:If the search returns more than 10,000 items, the Content Manager raises an error. To solve this problem, you must narrow the search request.

## 16.2 Searching in Bundles and Search Folders

If you perform a search in a location that contains Bundles or Search Folders, search ignores the items in those Bundles or Search Folders (unless the actual items themselves are also present in the search location).

## 16.3 Search input

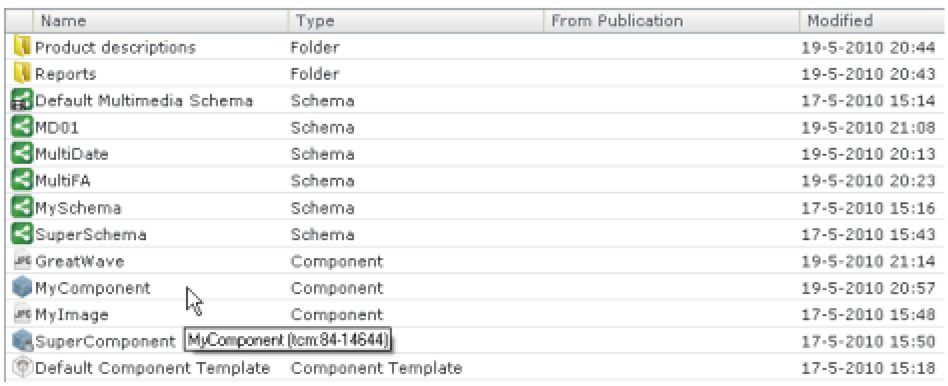
Content Manager Explorer search lets you search for items which appear in the title, description or content (fields) of an item. A search item can be a single word like `cheeseburger` or a set of strings enclosed in double quotes like `"hot dog"`. To expand or narrow your search you can use multiple search items, operators, and wildcards in your search input.

### 16.3.1 Search based on a URI

Every SDL Tridion item has a unique resource identifier (URI).

**Steps to execute**

1. Find out what the URI for any SDL Tridion item:
   - Place your cursor over an item in the Content Manager Explorer to see a tool tip that shows the SDL Tridion URI of that item:




   - Open the item in its own dialog and access the **Info** tab of the item to see its URI:


2. In the Content Manager Explorer, enter the Content Manager URI in the Search for URI field displayed in the toolbar:


3. Click the magnifying glass button to search for the item.

**Result**

If the URI refers to a container, such as a Publication, Folder, Structure Group or Category, the main view tree navigates to that container's node and the content area shows its contents. Otherwise, the Content Manager item opens in a new window.

## 16.3.2 Search operators

You can use operators to expand or narrow your search.

The following table describes the search operators:

| Operator | Function | Example |
| --- | --- | --- |
| `AND` | Searches for items containing both the search terms. If no operator is used between words, `AND` is assumed. | `tortellini AND guacamole` returns items containing both the words 'tortellini' and 'guacamole', in any order and with any words in between |
| `OR` | Searches for items containing either (or both) of the search terms. | `car OR park` returns items containing the words car or park. |
| `NOT` | Searches for items containing the search terms before the operator but not the search terms after the operator. | `pizza NOT pasta` returns items containing the words 'pizza' car but not 'pasta'. |
| `IN` | Searches for items that have the search terms in the specified field (XML element). | `car IN title` returns items containing the word 'car' in the 'title' XML element. |

You can search for an exact phrase simply by typing the phrase you are looking for enclosed in quotes. For example, if you want to search for items that contain the exact phrase "press release", enter `"press release"`. This will not match the content *We will initially release the product to the press*, but it will match *More information in our latest press release*.

## 16.3.3 Search wildcards

You can use wildcards to define a wildcard string, which can be used to locate related word matches.

The following table describes the wildcards you can use:

| Character | Function | Example |
|---|---|---|
| * | Searches for items that contain the entered text, allowing for any number of characters to replace the "*" wildcard | `corp*` returns items containing corporate, corporation, corporal, and corpulent |
| ? | Searches for items that contain the entered text, allowing one character to replace the "?" wildcard | ?an returns items containing: ran, pan, can, and ban |

## 16.3.4 Special characters and reserved words

The Content Manager views special characters as separators and not as part of a word. When it performs a search with special characters, the terms within the special characters are used.

Along with numbers, the following characters have special meanings: `+ - ! ( ) { } [ ] ^ " ~ * ? : \`. To search for a string that contains one of these characters, precede the character with a backslash (\). If the character is part of a phrase or term, enclose the search text in double quotes.

In addition, you need to place a backslash in front of the following reserved words (regardless of their capitalization):

- CONTAINS
- NEAR
- SENTENCE
- PARAGRAPH
- PHRASE
- IN
- MATCHES
- STARTS
- SUBSTRING
- ENDS
- AND
- OR
- NOT

## 16.3.5 Multimedia Components

You can also search for content in certain binary resources.

The following document formats are supported:

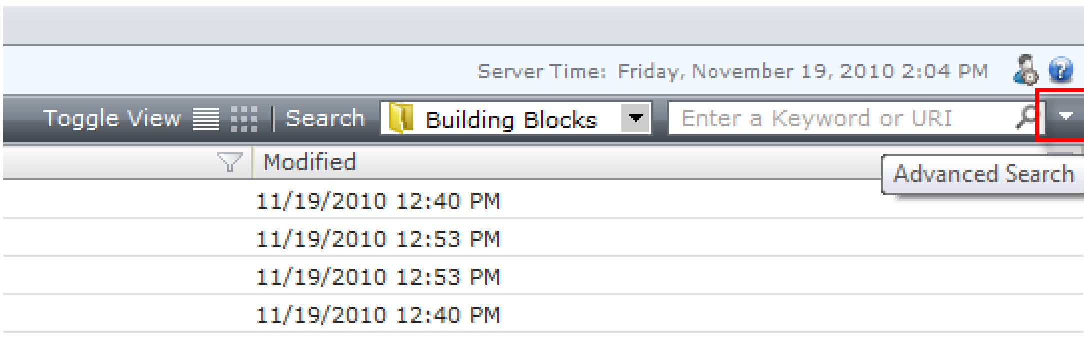
- HTML
- XML and derived formats
- Microsoft Office documents
- OpenDocument documents
- PDF documents
- EPUB (Electronic Publication Format) documents
- RTF (Rich Text Format) documents

Important:You cannot search for a Multimedia Component with its extension.

## 16.4 Advanced search

Advanced search allows you to define more specific search criteria to narrow or expand your search.

To perform an advanced search, click the expand button (arrowhead) next to the search input box:




In the Advanced search that is displayed, you see the most common advanced search options. You can click **Show more search options** in this area to see the full range of advanced search options.

This section describes all of the options in the fully expanded Advanced search area. When using Advanced search, you can still use all of the operators described in Search operators (see page 185) in the input box. All wildcards function as described in Search wildcards (see page 185).

| Search Parameter | Description |
|---|---|
| **Search term** | Your search input, which may include operators and wildcards, and which may be a Content Manager URI. Refer to Search input (see page 184) for details. |
| **Search for item names only** | Limits search to search in the internal names of items only. You cannot use wildcards. |
| **Search in item descriptions only** | Limits search to search in the description fields of items only. You cannot use wildcards. |
| **Search in** | Specify the node in which to search. Click **Browse** to open a navigation dialog to pick a specific node in which to search. |
| **Include subfolders** | When checked, this option also searches in all subnodes of the node in which you search. |

| Search Parameter | Description |
|---|---|
| **Date modified** | Check this box to limit your search to only items that were last modified in a certain date/time range. There are predefined options for searching in items that were last modified today, in the last X days, or in the last X months, where X is a number you set. |
| **Author** | Selected an author from the dropdown menu to search only for items created or modified by that author. |
| **Keyword** | Select a keyword to limit your search to only items that use the Keyword that you specify. To use this option, you must first select a Publication, Folder, or Structure Group in which to search. (You cannot use this option if you have selected the entire Content Manager as a search location.) You can then browse to and select one or more Keywords in the taxonomy tree. The result shows the items that use the Keyword or Keywords as metadata or as content in Components. For more information about Categories and Keywords, see the implementer's documentation portal. |
| **Publish status** | Select either **Published** or **Not published** from the dropdown menu to limit your search to only items with that publish status. If you select a publish status, search will return only Components, Component Templates, and Pages. |
| **BluePrinting** | The BluePrinting option limits search to search only in local or localized items, selected via a dropdown menu. You can also search for shared items if you have chosen to search within one Publication. |
| **Types** | If you select **Types**, you can select one or more item types (such as Component, Keyword, Schema and so on) by selecting them in the list that appears. Search will then only return items of the type(s) you select. |
| **Based on Schema** | Select this option and select a Schema from the dropdown to limit your search to only items that are based on the Schema you select. |
| **Workflow** | Select this option searches and pick a Workflow Process, then (optionally) an Activity from the second dropdown, to limit your search to only items that are currently in the selected Workflow Process (and, if selected, Workflow Activity) you selected. Note that you can only find a new item that is in Workflow item after the Workflow Process is complete. The completion of the Workflow Process checks in the item and makes it available for searching. |
| **State** | Select this item and select an item from the dropdown to limit your search to only items that are checked in, or only items that are checked out. |
| **Show results** | By default, search returns all matching results. Select one of the predefined values (50 or 100) to see at most that many search results. |
| **Save search** | After you have completed a search, select this option to create a Search Folder. Refer to Search Folders (see page 189) for details. |
| **Reset** | Select this option to return all advanced search parameters to their default settings. |
| **Search** | Select this option to execute your advanced search. |

# Chapter 17 Search Folders

Search Folders display the results of a search. When you open a Search Folder, the folder lists all of the items that match your search. You can create a Search Folder in any Folder in a Publication. You can create, delete, edit, localize and unlocalize Search Folders.

## 17.1 Creating a Search Folder

Create a Search Folder to access a list of items that match search criteria. The Content Manager does not store items in the Search Folder; rather, the Search Folder references them from other Folders and Structure Groups within a Publication. You create a Search Folder by performing a Search and saving the query.

### Requirements

To create a Search Folder, you must have Virtual Folder Management rights and write permissions for the containing Folder.

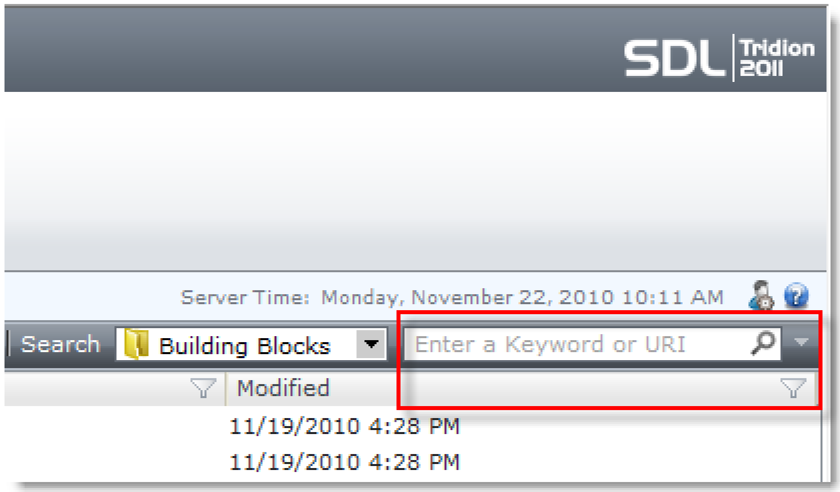
### Context

Depending on the search criteria, a Search Folder can display the following items: Folders, Structure Groups, Schemas, Components, Component Templates, Template Building Blocks, Bundles and other Search Folders. A Search Folder cannot reference itself.

To create a Search Folder from a search:

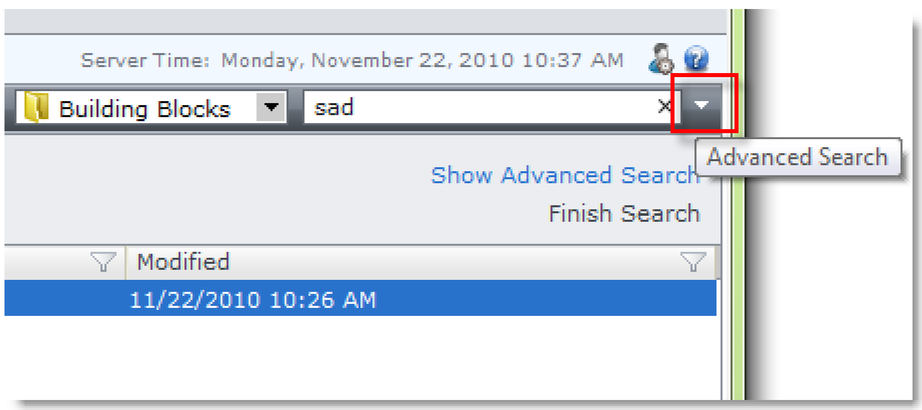
### Steps to execute

1. Enter your search term(s) in the search input box above the List View and click the search button next to it:



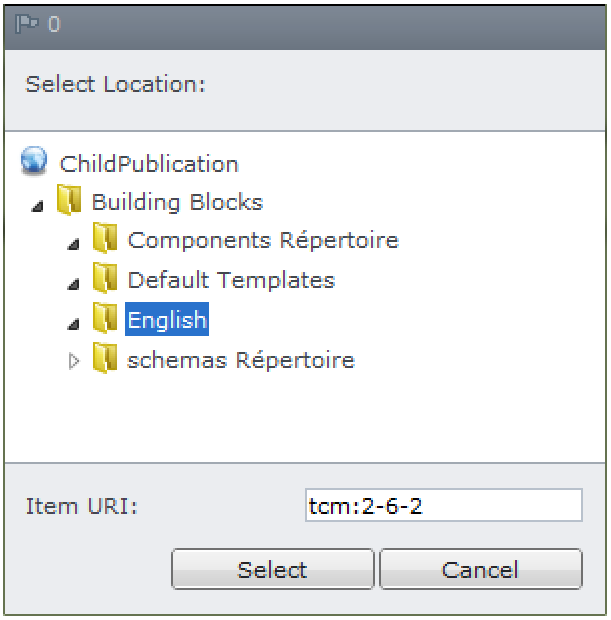

Note: For more information, see Search (see page 182).

2. After results are returned, click the **Advanced Search** button (arrowhead) next to the search input box or click **Show Advanced Search**:

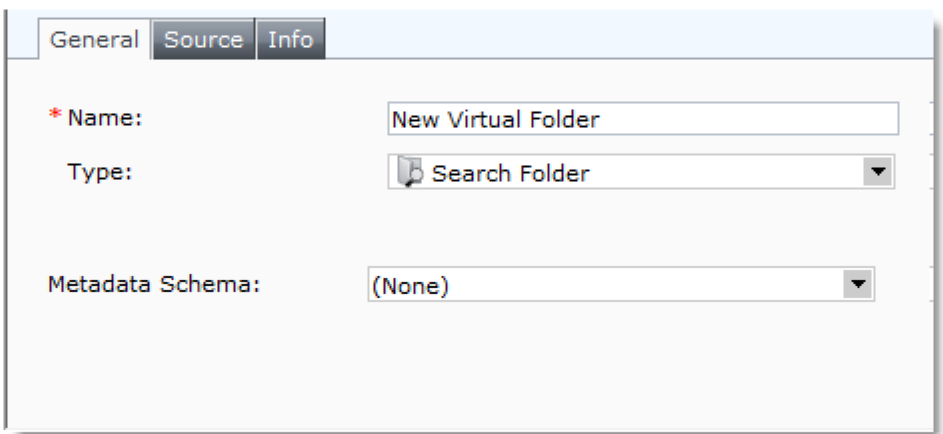



3. In the expanded view, click **Save search**.

4. In the location popup, navigate to the **Building Blocks Folder** in which you want to create the Search Folder and click **Select**.




5. In the **Virtual Folder** window that appears, fill in the following fields:
   - **Name** — the name of the Search Folder. This name must be unique.
   - **Type** — `Search Folder`
   - **Metadata Schema** (optional) — you can select a metadata Schema for the Search Folder in order to specify metadata.




6. Click **Save and Close** on the toolbar.

### Result

You have created a Search Folder.

## 17.2 Editing a Search Folder

Edit a Search Folder to modify its name, configuration, and metadata. You cannot change the Virtual Folder type.

### Requirements

To edit a Search Folder you must have Virtual Folder Management rights and Write permission for the containing Folder.

### Steps to execute

1. Navigate to the Search Folder that you wish to edit and click the **Open** button on the toolbar or context menu.
2. Modify the following fields as necessary:
   - **Name**
   - **Metadata Schema**
3. Click **Save and Close** on the toolbar.

### Result

You have modified the Search Folder. The Search Folder will display the results of the configuration information. BluePrint: If the Folder is edited in a BluePrint Parent Publication, Child Publications that use the shared item now use the modified Folder.

In a BluePrint, you can only edit a local Folder or a local copy of a shared Folder. You cannot edit a shared Search Folder. If the Search Folder is a local copy, you cannot edit the configuration data.

## 17.3 Deleting a Search Folder

You can delete a Search Folder to remove the Folder from the Content Manager. Items in a Search Folder are not deleted when you delete a Search Folder, and still exist in their original Folder.

### Requirements

To delete a Search Folder you must have Virtual Folder Management rights and Delete permissions for the containing Folder.

### Steps to execute

1. Navigate to the Folder that contains the Search Folder you want to delete.

2. Select the Search Folder from the list view.
3. Click the **Delete** button on the toolbar or context menu.
4. You are prompted to confirm deletion. Click **Yes**.

### Result

You have deleted the Folder from the Content Manager.

## 17.4 Localizing or unlocalizing a Search Folder

If a Search Folder is shared to a BluePrint Child Publication, you can localize the Search Folder to create a local copy. When you localize a Search Folder, you can edit the name and metadata. You cannot edit the type or search criteria. You can also unlocalize a Search Folder to use the shared Search Folder from a Parent Publication.

Note: The search results in a Search Folder are within one publication only. Therefore, the unlocalized Search Folder contains only those items in the Parent Publication.

## 17.5 Using items in a Search Folder

When you access the list view of a Search Folder, you see items to which you have read, write, localize, or delete permissions for the storage Folder or Structure Group and items that meet the search criteria for the Search Folder.

The items in a Search Folder represent the items to which you have read, right, localize, and/or delete permissions and rights. As a result, the Search Folder content may vary from one user to the next.

You can perform the following actions on items in a Search Folder:

- Check-in/-out and undo check-out
- View an item’s History List
- Rollback
- Localize/Unlocalize
- Publish/Unpublish
- View
- Copy
- Edit (if you rename an item in a Search Folder and refresh the list view, the changes do not appear immediately. To verify that the Content Manager has made the changes, enter another Content Manager Folder, and then return to the Search Folder.)
- Cut (if you cut an item from a Search Folder, you can move the item from its original position; however, if the item still falls within the search criteria, it will still appear in the Search Folder.)
- Delete (if you delete an item from a Search Folder, you also delete it from the Content Manager.)

Important:It is not possible to create items in or paste items into a Search Folder.

## 17.6 Search Folders and Content Manager functionality

This concept describes Search Folders in relation to BluePrinting, Search and Content Manager security.

**BluePrinting**

In a BluePrint, Search Folders are shared to Child Publications. You can localize a Search Folder in a Child Publication to edit the name and the metadata.

Note: If a shared or local copy of a Search Folder uses a Workflow Process as Search criteria, it will not yield results in a Child Publication since Process Definitions are not BluePrinted.

The items displayed in a shared or localized Search Folder include local items, local copies, and shared items within that Publication.

**Search**

Search Folders do not support indexing of their contents, since the contents exist by reference only. As a result, an end user cannot search for an item within a Search Folder. Search Folders are indexed, so it is possible to search for a Search Folder.

**Security**

Search Folders do not have security settings (Read, Write, Localize, Delete); instead, the Folder that contains the actual items determines the security on the items in a Search Folder. This means that different Content Manager users may view different content in a Search Folder based on their own user rights and permissions.

At a Publication level, a user must have Virtual Folder Management permissions to create, edit, or delete a Search Folder.

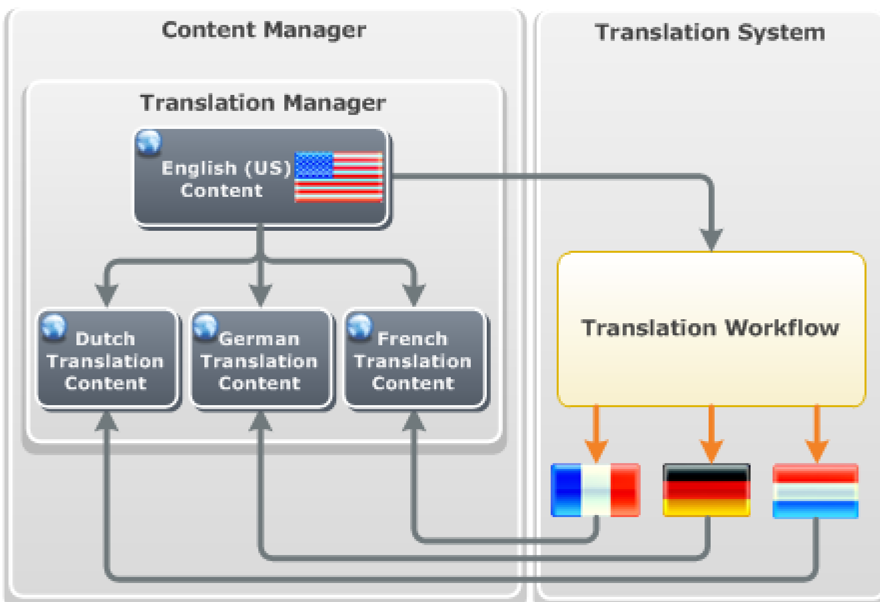
# Chapter 18 Translation Manager

Translation Manager allows you to send content stored in the Content Manager of SDL Tridion for translation to a translation management system so that you can effectively and efficiently create and maintain multilingual content.

Translation Manager is the integration between:

- Content Manager of SDL Tridion—manages Web content, controls user access to content, and re-purposes content via BluePrinting
- SDL Translation Management System (SDL TMS) or SDL WorldServer—manages the translation process, enforces terminology, and performs translations based on a knowledge base of previous translations called a translation memory

The following diagram provides an overview of the functionality provided by the integration:



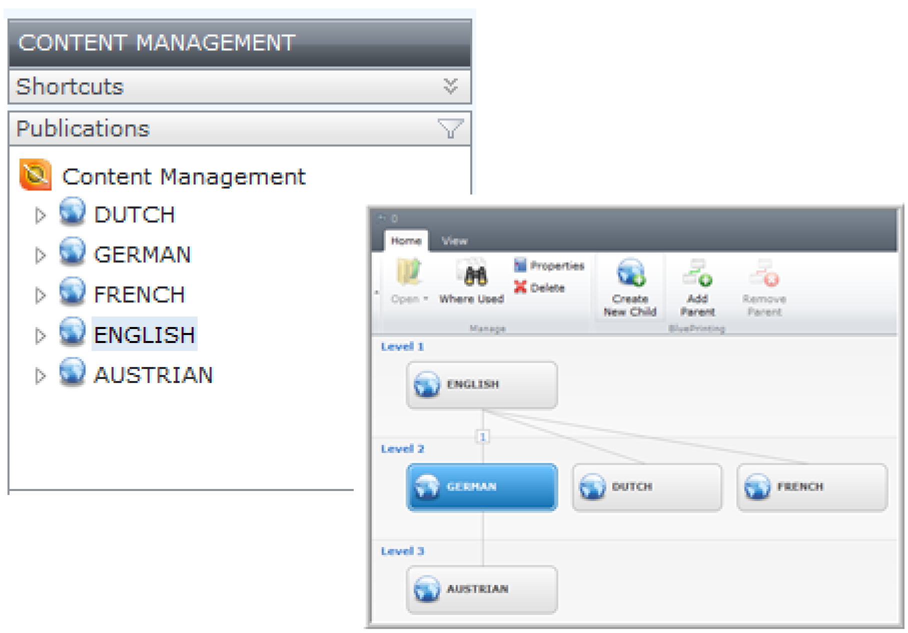

## 18.1 Translations and BluePrinting

To manage translations in the Content Manager, you need to have a basic understanding of your translation BluePrint, how authorization affects the scope of a translation and how the Content Manager handles localization. This section provides some background information on how translating is set up in the Content Manager.

**Translation BluePrint**

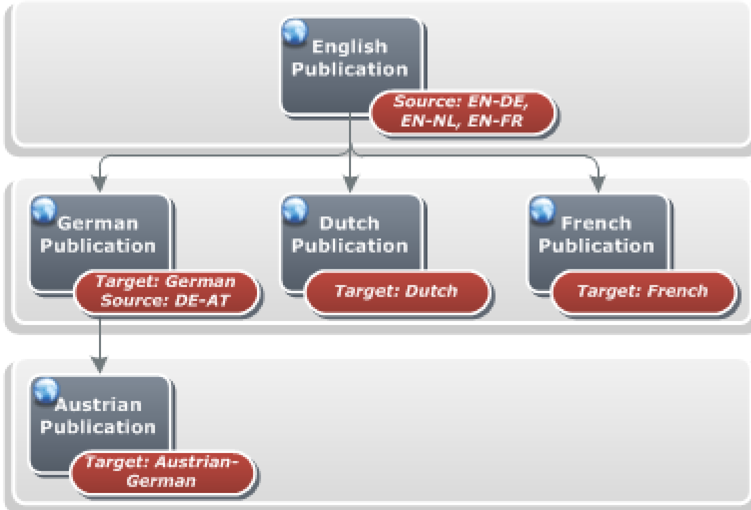
Before you start initiating translations it is a good idea to have a sound understanding of the Translation BluePrint used by your organization. A BluePrint is a hierarchy of Publications which defines how content is shared and reused. The Translation BluePrint models your localization and translation strategy—the structure defined by your BluePrint drives translations and dictates the translation flow. It defines which from source languages to which target languages you can translate to, and which Publications contain content in a source language (Source Publications) and which Publications can receive translated content (Target Publications).

The BluePrint Viewer (see page 58) provides a visualization of the Parent-Child relationships within a BluePrint and the BluePrint relationship between items. Select an item in the Content Manager Explorer and choose **BluePrinting** > **BluePrint Hierarchy** in the context menu to view the BluePrint. The following image shows a BluePrint displayed in the **Tree View** of the Content Manager Explorer and in the **BluePrint Viewer**:




### Translation BluePrint configuration

The configuration of the BluePrint determines which translations are possible: in other words, from which source to target languages you can translate to and from. A Publication containing content in a source language is referred to as a *Source Publication*, and a Publication which can receive translated content a *Target Publication*. For example, in the following BluePrint configured for translation (based on the example shown above), you can translate from English to German, Dutch, and French, and from German to Austrian-German:




Note: You can view the configuration of a Publication by going to **Translation** tab in the Publication properties.

**Authorization**

When you log on to the Content Manager Explorer, the only Publications in the BluePrint visible to you are the ones for which you have access permissions (as set by the system administrator). To be able to initiate translations, you must have access permissions to at least one or more configured *Target Publications*; these are Publications which can receive translated content. If you have access permissions to configured *Source Publications* as well as Target Publications, you can initiate translations from one language to several targets. The scope of a translation initiated from a Source Publication is therefore potentially larger than one initiated from a Target Publication which will always have just one target (itself). For example, in the BluePrint above:

- If you have access to the English Publication, you can initiate translations from English to German, Dutch, and French provided you have to these Publications as well
- If you have access to the German Publication, you can initiate translations from English to German. You can also translate from German to Austrian German, provided you also have to this Publication
- If you have access to the Austrian German Publication, you can initiate translations from German to Austrian German

Note: To be able to initiate translations, you must have Translation Management rights and have access permissions to one or more configured *Target Publications*; these are Publications which can received translated content. To change your access permissions, contact your System Administrator.

**Localization**

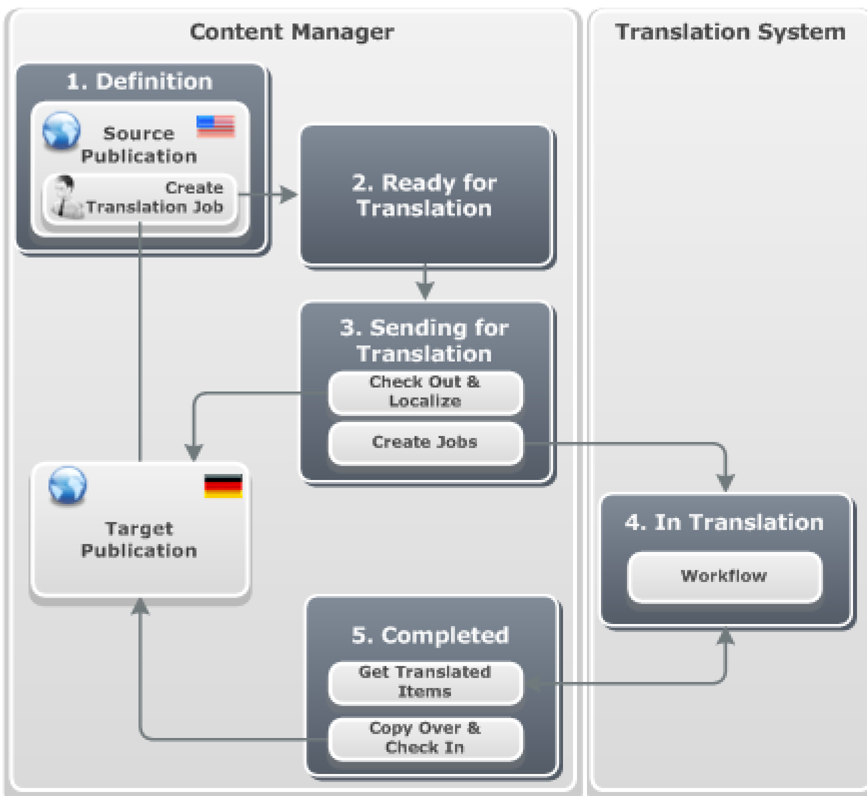
The localization process (the process of translating content into different languages) is handled automatically by Translation Manager when you send content for translation to the translation management system.

When you send a Content Manager item for translation, the Content Manager localizes and checks out the item in the Target Publication before sending it to the translation management system. When the translation management system sends the translated item back, the item is localized (if not done so already) and replaced by the translation. The item is then checked in and is now a *local copy*, or localized version of a shared item.

## 18.2 Translation process

There are a number of different stages of a Translation Job from Definition to Completion. This concept describes how translations are processed by Translation Manager and the various statuses a Translation Job can be in.

You can see the current stage of a Translation Job—the job status—in the Translation Job Queue. The following diagram provides an overview of the translation process:




Translations are handled in the following main stages by the Translation Manager:

**1. Definition**

The Translation Job has been defined and has been saved but has not been sent to the translation management system. At this stage, you can still edit the Translation Job and add or remove items. When you send the job for translation, the job status is set to **Ready for Translation**.

**2. Ready for Translation**

The Translation Job has been defined and has been sent and is awaiting transferral to the translation management system. In the **Ready for Translation** stage, the Translation Jobs are waiting to be picked up by the Translation Manager Service. The service polls the Translation Manager at configured intervals for Translation Jobs submitted for translation. When the service picks up the job, the job status is set to **Sending for Translation**.

**3. Sending for Translation**

The Translation Job is being processed for transferral to the translation management system. In the **Sending for Translation** stage, the Translation Manager Service retrieves Translation Jobs ready for translation from the Translation Manager and does the following:

- checks out and localizes the Content Manager items in the relevant Target Publications.
- splits the Translation Job into one or more jobs depending on settings in the Translation Manager configuration file.
- sends the jobs and source content to the translation management system when polled (the translation management system polls the Translation Manager Service at configured intervals to check for translations waiting for transferral).
- sets the job status to **In Translation**, unless an error occurs in one of the previous steps in which case the job status is set to **Error sending** and the process is stopped.

**4. In Translation**

The Translation Job is being processed in the translation management system using the specified translation workflow. During this stage, the Translation Manager Service polls the translation management system at configured intervals to check for translations that have been processed through workflow. You can derive information about the state of the job in the translation management system from the workflow status. You can see workflow stages in the **Translation Progress** tab of a Translation Job.

Between the **In Translation** and **Completed** stages the Translation Manager Service retrieves completed translations from the translation management system and does the following:

- copies over the translated items, one by one as they are completed, to the relevant Target Publications.
- checks in the checked out items.
- sets the job status to **Completed** when the translated content is back in the Content Manager, that is when all items that were part of the original Translation Job have been translated and updated in the Content Manager, unless an error occurs in one of the previous steps in which case the job status is set to **Error retrieving**. In the **Error retrieving** state, if the error is related to a specific item as opposed to be a generic error for the job the Translation Manager will retry receiving the specific item every 24 hours, although you force this by selecting **Retry retrieving**. Note also that if the Translation Manager Service is restarted, it will reset its list of failed items and try to retrieve them all again.

**5. Completed**

The items in the original Translation Job have been returned from the translation management system and checked in.

A Translation Job can also be one of the following states:

**Error sending**

An error was encountered while processing the Translation Job for transferral to the translation management system. You can view details of the errors in the Translation Job **Error** tab.

**Error retrieving**

An error was encountered while returning a Translation Job to the Content Manager. In the **Error retrieving** state, Translation Manager continues to attempt to receive items that have not yet been sent back from translation. If errors are related to specific items, for example the returned XML is not valid, as opposed to be a generic error for the job, for example unable to connect to the server, the Translation Manager does the following:

- Attempts to retrieve items previously failed every 24 hours ago. If unsuccessful, it reverts to the **Error retrieving** state.
- Attempts to retrieve items previously failed if you choose **Retry retrieving**. If unsuccessful, it reverts to the **Error retrieving** state and retries fails items every 24 hours.
- Resets its list of failed items and will try to retrieve all of them again if you restart the Translation Manager service.

**Canceled**

The Translation Job has been canceled on the translation management system and the checked out items undone.

**Deleting**

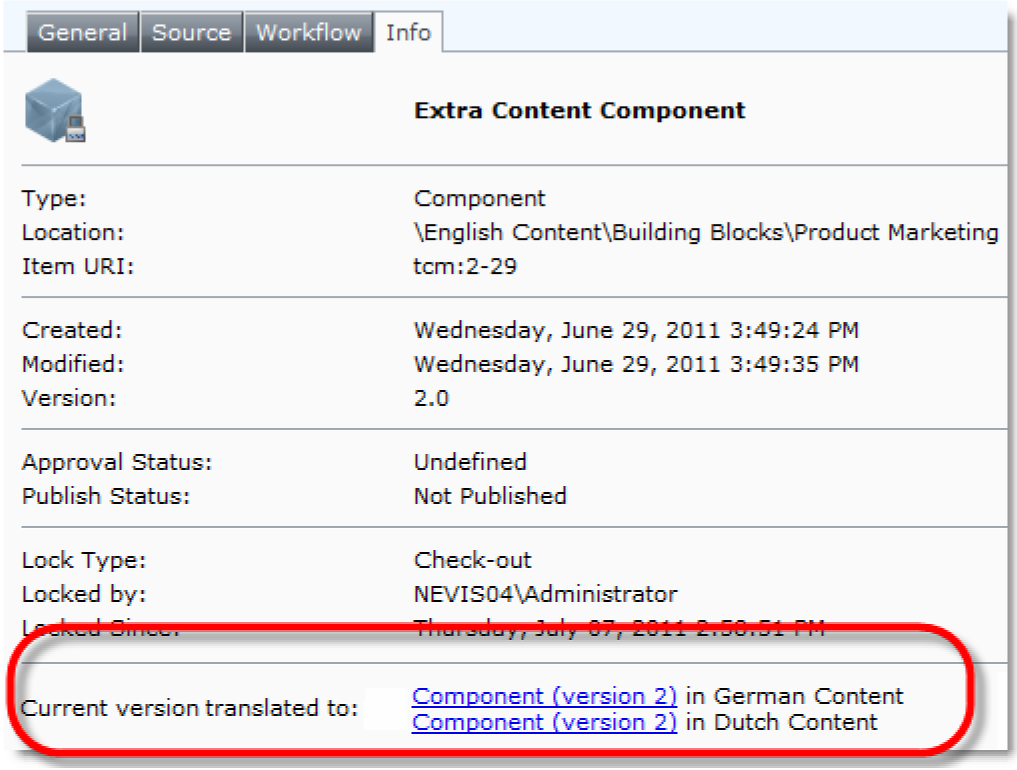
The Translation Job is being processed for deletion (appears when you delete a Translation Job in **Error sending** or **Error retrieving** state).

## 18.3 Translation information

In the Component **Info** tab you can see whether the current version of the Component has been translated or, if the item has been modified since it was last sent for translation, which version of the item was last translated.

Depending on whether the Component was a source or target for a translation, the tab also displays a link to the Component that was the source for the translation or links to items that were the target for a translation. You can also see which Publication the source or target content is located.

If the content is currently in translation, the tab displays a link to the Translation Job.




## 18.4 Creating a Translation Job

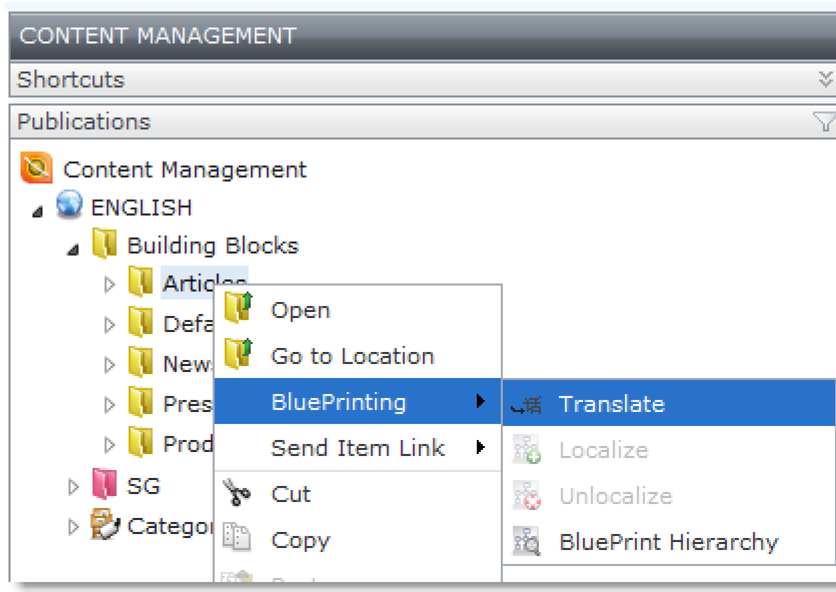
You package content for translation in a Translation Job. You create a Translation Job by selecting one or more translatable items in the Content Manager and choosing **BluePrinting** > **Translate** from the context menu.

### Requirements

To create a Translation Job you must have Translation Management rights and one other Content Manager right to a Publication (or Publications) that is a target for the translated content.

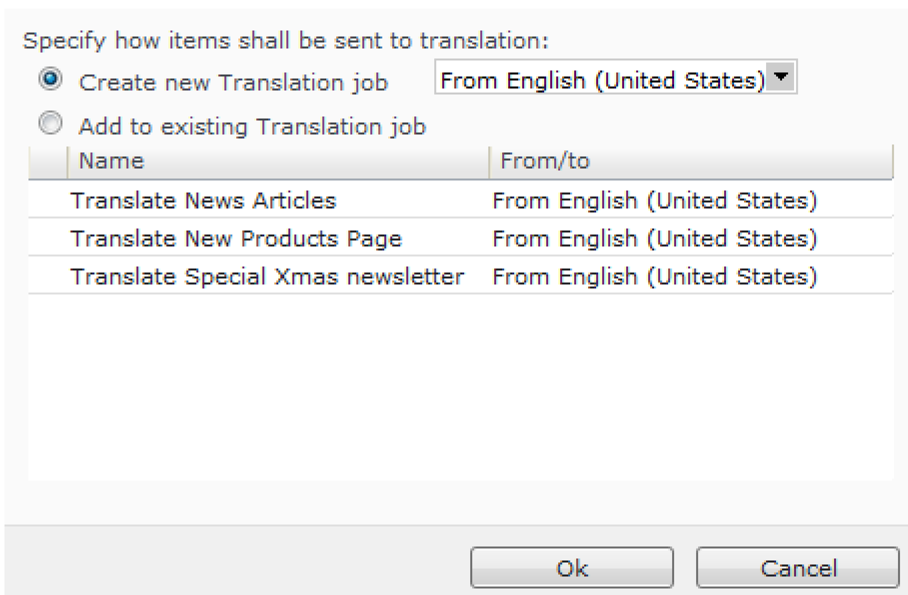
### Steps to execute

1. In the Content Manager, select one or more translatable items in a configured Publication and choose **BluePrinting** > **Translate** from the context menu:




The **Translation Job** dialog appears.

2. Specify how to send the items to translation:
   - Select **Create New Translation Job** and click **OK**.
   - Select **Add to existing Translation Job**, select one of the open Translation Jobs from the list and click **OK**.



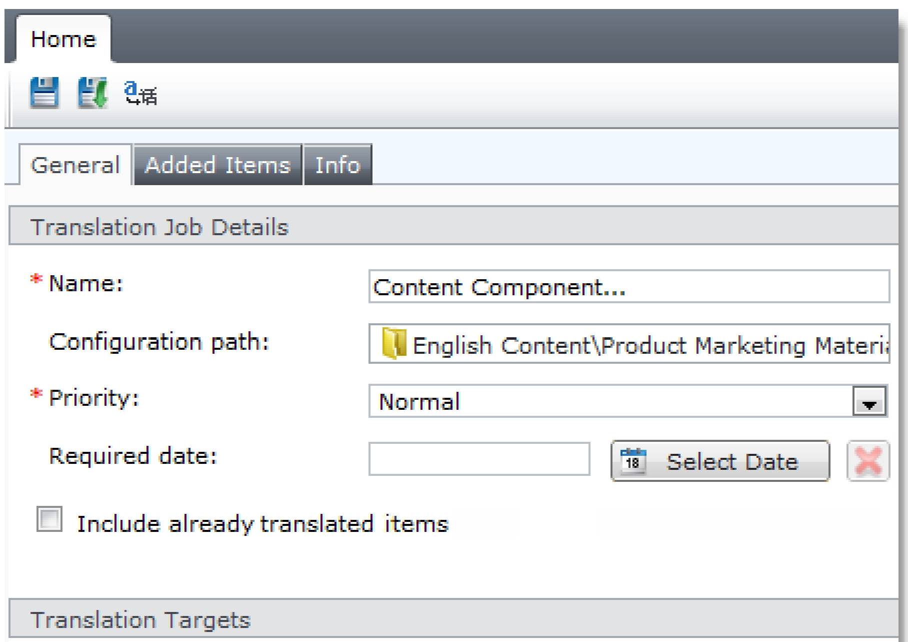

Note: The **From/To** column indicates whether you are creating a Translation Job from a Source Publication (From) or from a Target Publication (To).

3. In the **General** tab, enter values in the **Translation Job Details** section:
   - Enter a **Name**.

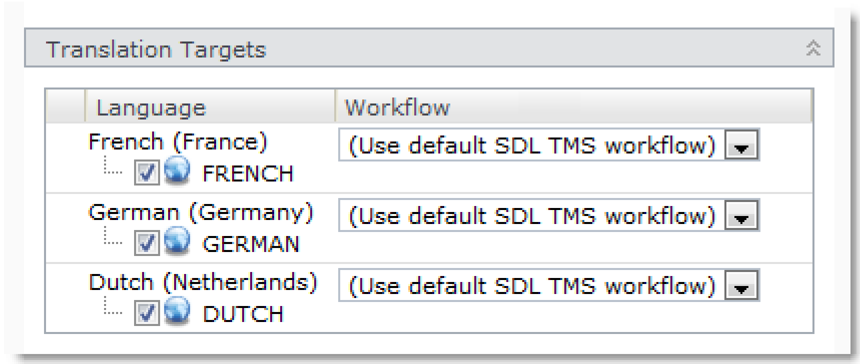
- The **Configuration path** displays the Publication, Folder, Structure Group, Category that is configured for translation.
- Set a **Priority**—Translation Jobs with higher priorities are sent sooner to the translation management system than those with lower priorities and also have precedence for translation on the translation management system. You can set `High`, `Normal` or `Low` priority levels.

  Note: You cannot set **Priority** if you are using SDL WorldServer.

- Select a **Required Date**—set a due date for when the translation should be returned from the translation management system (if you do not specify a value, the default value on the translation management system is used).
- Select a **Business Unit** (if configured)—you can specify the Business Unit billed for the translation.
- Select a **Include already translated items**—by default, Translation Manager does not send items included in a Translation Job to translation if the item has not changed since it was last sent. You can override this behavior by selecting the **Include already translated items** check box, for example if you were not satisfied with the translation.

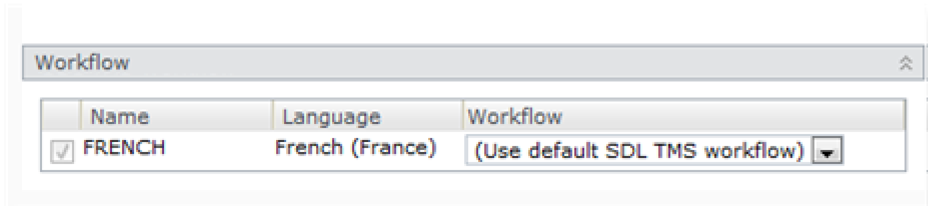



4. In the **General** tab **Translation Targets** section:
   - If you initiated a job from a Source Publication, you can select the Languages you want to translate to and specify the **Workflow** to use:




Note: If you are using SDL WorldServer the Workflow is set for you.

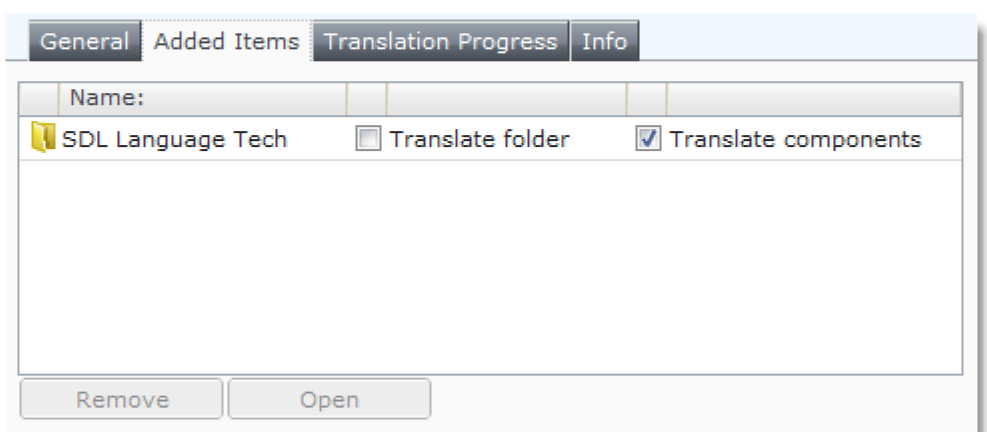
- If you initiated a job from a Target Publication, you can specify the Workflow to use:




5. In the **Added Items** tab, you can see each item in the Translation Job. For items that contain subitems, such as Folders and Pages that contain Components and Keywords that contain nested Keyword, you can specify the following options:

   - Select **Translate Item** check box to add this Content Manager item to the Translation Job.
   - Select **Translate components** check box(or **Translate Keywords** if you selected a Category) to add all nested content to the Translation Job.

   The following image shows an example of the **Added Items** tab:



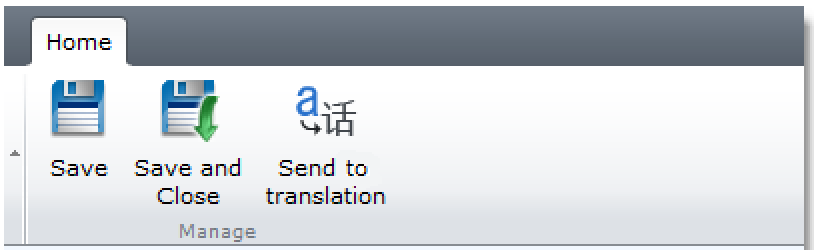

6. Select an item and click the **Open** button to open the Content Manager item you want to send to translation.

7. Select an item and click the **Remove** button to remove the Content Manager item from the Translation Job.

8. In the **Info** tab, you can view information about the Translation Job.

9. When you are finished with the Translation Job, proceed by clicking one of the following in the Ribbon toolbar:

   - **Save**—saves the Translation Job, which remains open for editing
   - **Save and Close**—saves and closes the Translation Job (the remains in an editable state until it is sent)
   - **Send to Translation**—sends the Translation Job to the translation management system




### Next steps

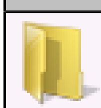
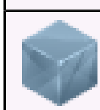
If you have saved the Translation Job it is in the **Definition** state and you can view, modify, and add items to the Translation Job, send it for translation, or delete it. Any user who is authorized to initiate translations and who has access permissions to the Publication which is a target, or potential target, of translated content can modify the Translation Job so long as it is in the **Definition** state. It is therefore important to realize that the initiator of a Translation Job does not have sole ownership.

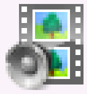
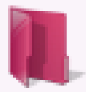
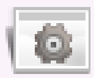
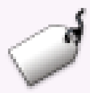
## 18.4.1 Translatable content

You can send Folders, Components, Multimedia Components, Structure Groups, Categories and Keywords for translation. The following list describes the Component fields, Metadata fields, and properties of these Content Manager items that are sent for translation.

**Translatable items**

You send the following Content Manager items in a Translation Job:

| Icon | Content Manager Item | Description |
|---|---|---|
|  | Folders | Organize content building blocks, amongst which Components. |
|  | Components | Contain content. |

| Icon | Content Manager Item | Description |
|---|---|---|
|  | Multimedia Components | Contain multimedia content. |
|  | Structure Groups | Organize, manage, and provide a URL structure for Pages. |
|  | Pages | Contain Component Presentations which combine content (Components) and layout (Component Templates). |
|  | Category | A Category is the root classification of a taxonomic hierarchy defined using Keywords. |
|  | Keywords | A list of values which can be used in Components and metadata. A Category contains Keywords which in turn can contain nested Keywords. |

### Component fields

You can send the following fields for translation in a Component:

- Component Text fields, but not if the values are selected from a list
- Component External Link fields, for example, if you want to translate a URL such as `google.co.uk` to `google.nl`
- Component Format Area fields, including attribute values for example `alt="System Architecture"`

You need to select the **Translatable** check box in Schemas if you want to allow these fields to be sent for translation.

### Metadata fields

If the following Content Manager items have metadata fields of type Text field or External Link field, you can send these fields for translation:

- Components
- Multimedia Components
- Folders
- Structure Groups
- Pages
- Categories

You need to select the **Translatable** check box in Schemas if you want to allow these fields to be sent for translation.

### Translatable properties

When you include Content Manager items in a Translation Job, the following item properties are sent for translation:

- Component Name
- Multimedia Component Name
- Folder Name
- Structure Group Name
- Structure Group Directory
- Page Name

- Page Filename
- Keyword Name
- Keyword Description
- Category Name
- Category Description

You need to select **Translate item options** in a Publication if you want to allow these properties to be sent for translation. For Component Name, you need to select an option in the Component Schema.

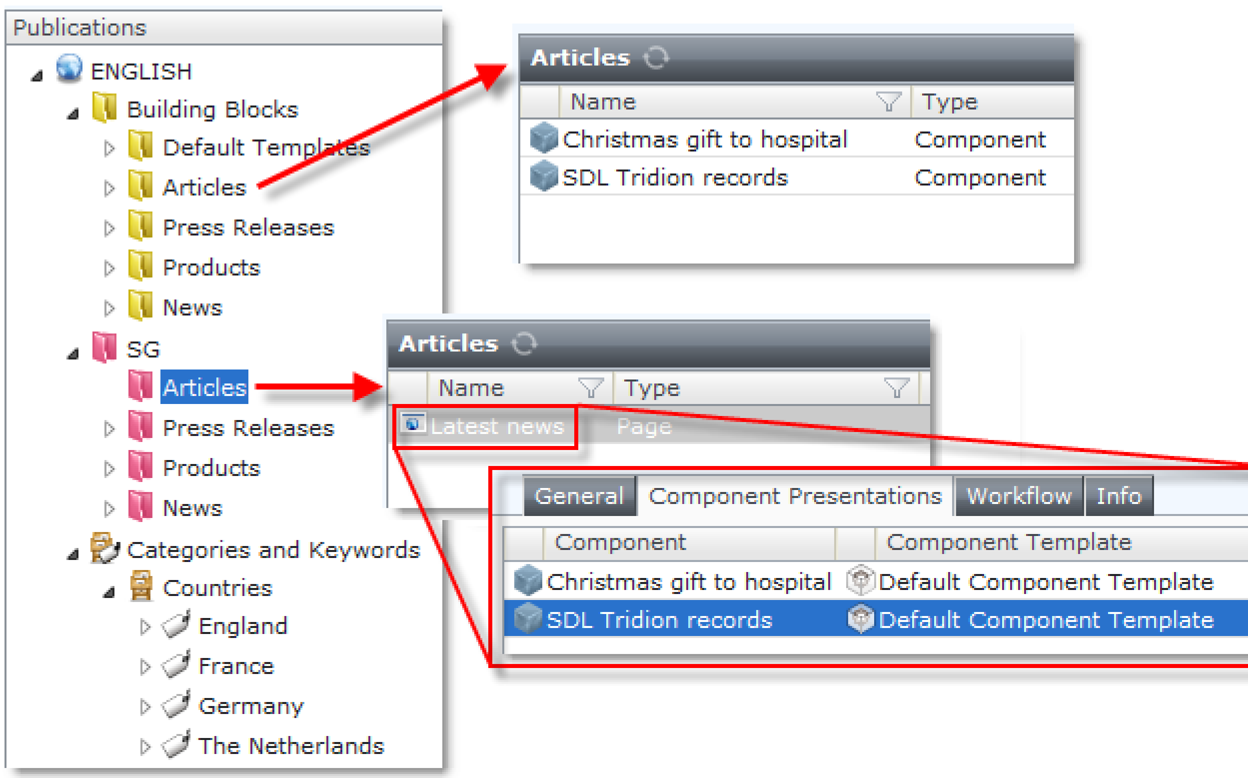
## 18.4.2 Recursive content

Recursive items are translatable Content Manager items that can contain nested items.

The following items can include nested items in a Translation Job:

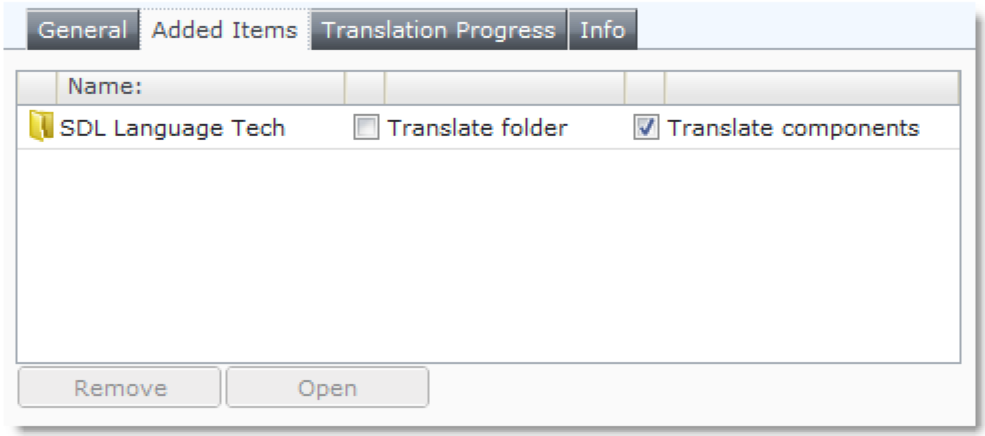
- Folders contain Components and nested Folders
- Structure Groups contain Pages and nested Structure Groups
- Pages contain Components
- Categories contain Keywords which can contain nested Keywords

The following image shows these items and nested items:

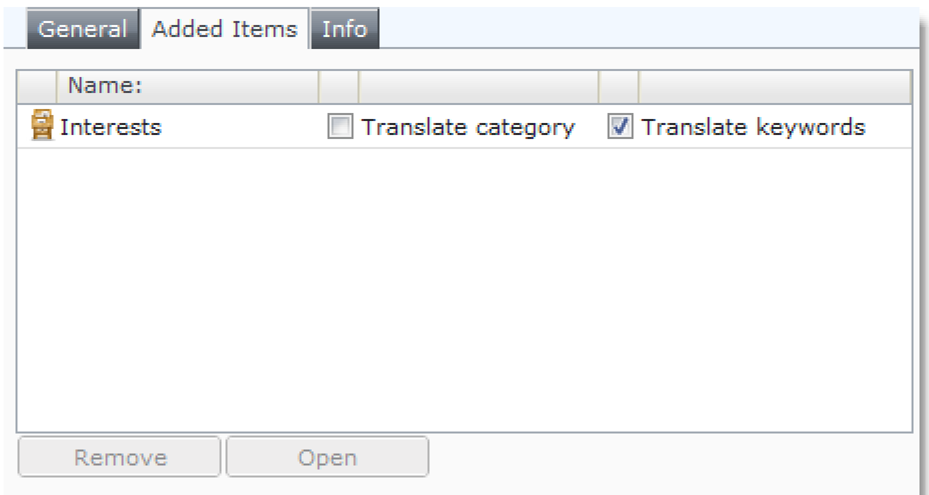



When you add a recursive item to a Translation Job, in the **Added Items** tab you can indicate whether you want to send item properties for translation and whether to add nested items. When the item is sent for translation, it —and each of its nested items (to an indefinite nesting level)—is evaluated and resolved individually to determine its inclusion, or exclusion, from the Translation Job.

The following image shows the **Added Items** tab for a Page added to a Translation Job:




The following image shows the **Added Items** tab for a Category added to a Translation Job:




## 18.4.3 Translation Jobs

You bundle content that you want to send for translation into a Translation Job which you can then send for translation to the translation management system.

A Translation Job in the Content Manager may be split into several Translation Jobs on the translation management system depending on the configuration of the Translation Manager and whether you are translating from multiple source or target languages. When a job has been translated on the translation management system and been processed through workflow, it is sent back to the Content Manager Server where the item is copied over and checked in. As the original job on the Translation Manager may have been split into several jobs in the translation management system, the Translation Job is not set to completed until all these jobs have been translated, returned, and checked in.

The translation management system is the owner of the translated content, therefore if you modify a localized item in the Content Manager which has been translated by the translation management system, these changes will be lost if the item you changed is sent to translation again because the translation management system works on the basis of a translation memory and it has no memory of these changes. The content will be translated according to its memory and the translation items it sends back will overwrite the ones in the Content Manager. Therefore, if you want to update the content of a translated item implement a review stage in the workflow (or manually update the translation units stored within the translation memory).

# 18.5 Adding items to a Translation Job

You can add items to an existing Translation Job that has not yet been sent for translation (whose status is **Definition**).

## Requirements

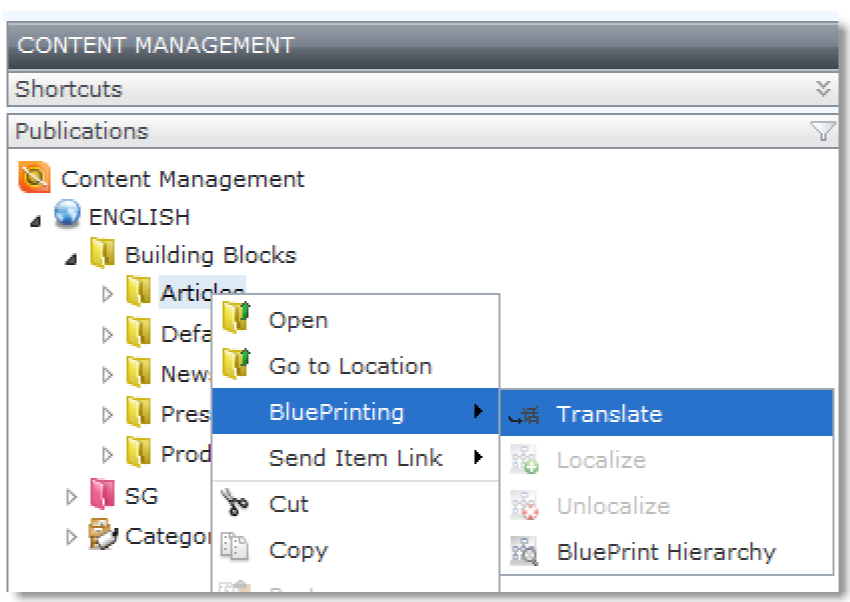
To add items to a Translation Job you must have Translation Management rights and one other Content Manager right to a Publication that is a target for the translated content.

## Context

Any user who is authorized to initiate translations and who has access permissions to the Publication which is a target, or potential target, of translated content can add items to an existing Translation Job.

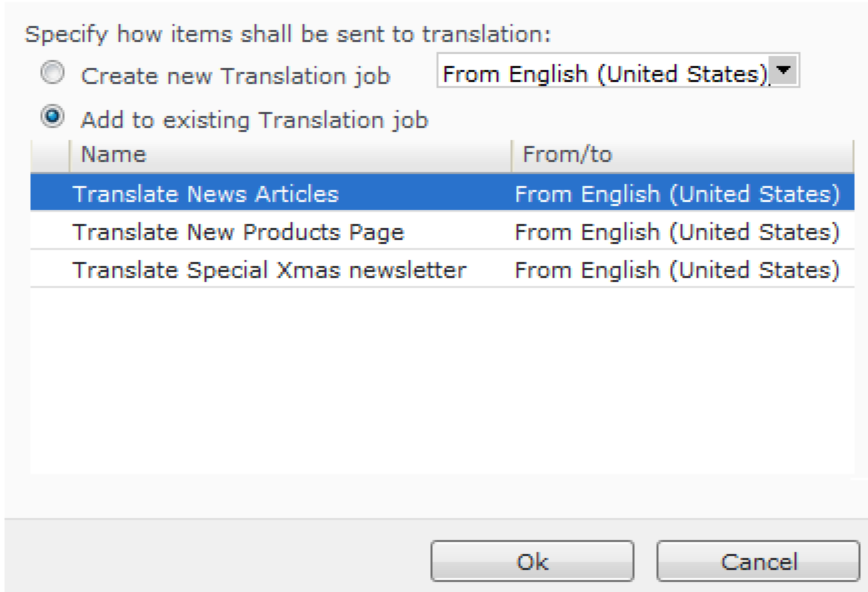
## Steps to execute

1. In the Content Manager, select one or more translatable items in a configured Publication and choose **BluePrinting** > **Translate** from the context menu:



The Translation Job dialog appears.

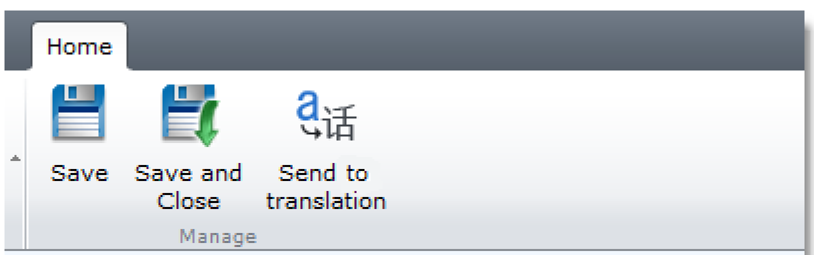
2. In the **Translation Job** dialog, select **Add Items to existing Translation Job**:




3. Select a Translation Job from the displayed list and click **OK**.

   The **Translation Job** dialog appears for the Translation Job you selected with the Content Manager items you selected added to the job.

4. Click **Save** or **Save and Close** in the Ribbon toolbar to commit the changes—the Translation Job remains in an editable state until you send it for translation:




## Next steps

If you have saved the Translation Job, you can view, modify, and add items to the Translation Job, send it for translation, or delete it.

# 18.6 Viewing a Translation Job

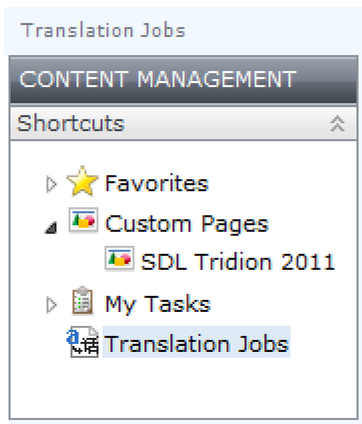
You can view all existing Translation Jobs in the **Translation Jobs** queue. You can modify Translation Jobs that have not yet been sent for translation (whose status is **Definition**).

## Requirements

To view and modify a Translation Job you must have Translation Management rights and one other Content Manager right to a Publication that is a target for the translated content. The Translation Jobs displayed in the Translation Jobs queue is filtered depending on the access permissions of the user.

## Steps to execute

1. In the Content Manager, select the **Translation Jobs** node in **Shortcuts**:




   A list of Translation Jobs is displayed in the list view.

2. Filter and sort the list based on the values in any one of the columns:


   - **Name**—specifies the name assigned to the Translation Job
   - **Date/time**—specifies when the Translation Job was created
   - **To/From**—specifies whether the job was initiated from a Source or Target Publication
     - **To**—the job was initiated from a Target Publication

    - **From**—the job was initiated from a Source Publication (multiple targets possible)
  - **Language**—specifies the language of the Publication where the job was initiated
  - **Publication**—specifies the name of the Publication where the translation was initiated
  - **Status**—specifies the current status of the translation
  - **Completed**—specifies the percentage completion

3. Select a Translation Job from the list and choose **Open** from the context menu.

   The **Translation Job** dialog appears.

4. Modify properties and settings in the **Translation Job** dialog—for more information, see Creating a Translation Job (see page 201).

### Next steps

If you have saved the Translation Job, you can view, modify, and add items to the Translation Job, send it for translation, or delete it.

## 18.7 Sending a Translation Job

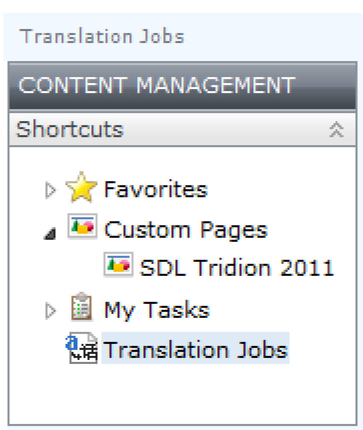
You can send a translation to the translation management system in the Translation Job dialog, or you can send an existing Translation Job (whose status is **Definition**) directly from the Translation Jobs Queue.

### Requirements

To send an existing a Translation Job you must have Translation Management rights and one other Content Manager right to a Publication that is a target for the translated content.

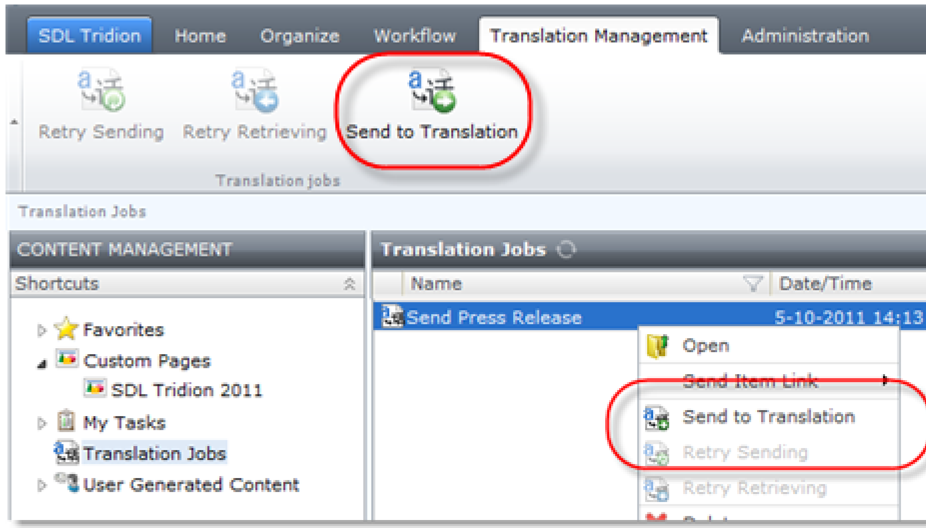
### Steps to execute

1. In the Content Manager, go to the **Translation Jobs** node in **Shortcuts**:



A list of Translation Jobs is displayed.

2. In the Translation Jobs node, select a Translation Job from the list and do one of the following:
   - choose **Send to Translation** from the context menu.
   - click **Send to Translation** in the Ribbon toolbar.




## Result

You have sent the Translation Job to the translation management system for translation. The Translation Job is now in the **Ready for Translation** state, meaning it is waiting to be transferred to the translation management system.

## Next steps

You can track the progress of the Translation Job in the Translation Jobs Queue in the Content Manager, or on the translation management system.

# 18.8 Resending a Translation Job (on send error)

Errors can occur during the sending and retrieving of a Translation Job to or from the translation management system. You can resend a Translation Job as a result of an error occurring while sending the Translation Job to the translation management system, or simply to restart a translation cycle.

## Requirements

To resend a Translation Job you must have Translation Management rights and one other Content Manager right to a Publication that is a target for the translated content.

## Context

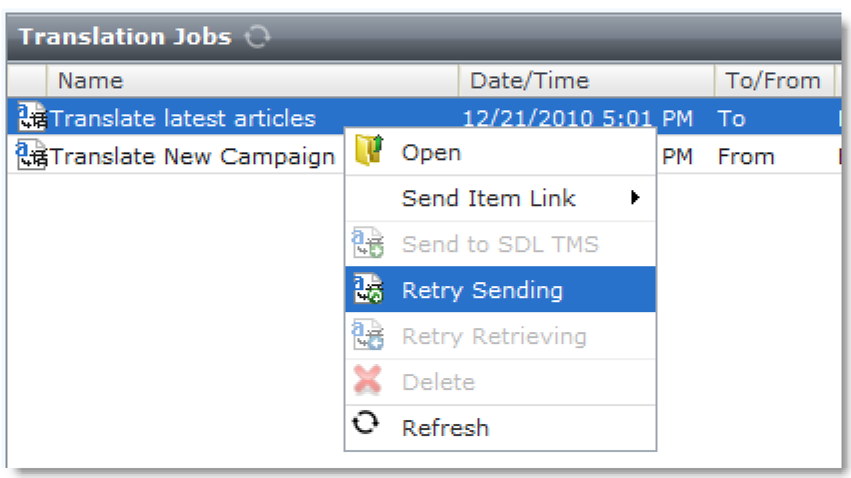
When errors occur during the **Sending for Translation** state—while the Translation Job is being processed for transferral to the translation management system—Translation Manager sets the state of the Translation Job to **Error sending**.

You can also resend Translation Jobs that are in the following states:

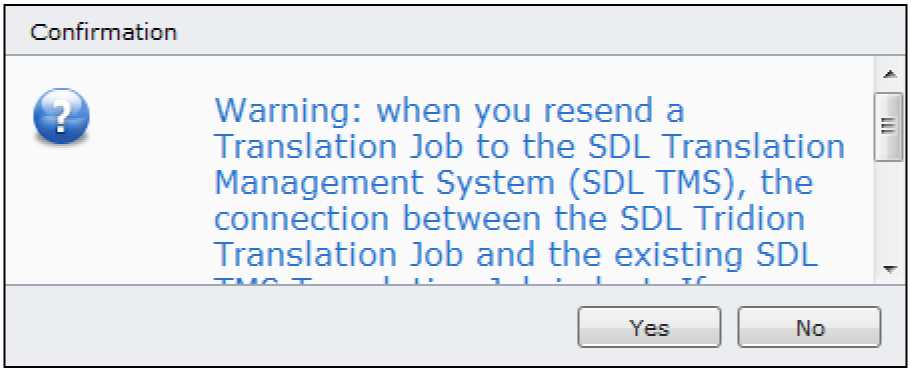
- **Sending for Translation**
- **In Translation**
- **Retry retrieving**
- **Completed**

## Steps to execute

1. In the Content Manager, select the **Translation Jobs** node in **Shortcuts**.
2. If the state of the Translation Job is set to **Error sending**:
    a. Select a Translation Job from the list and choose **Open** from the context menu.
    b. Click the **Error** tab. Details are displayed in the **Error Details** section.
    c. Fix the errors, for example:
        - Content Manager items does not exist
        - Folder is empty
        - Network connection error
3. In the Translation Jobs Queue, select a Translation Job and choose **Retry sending** from the context menu:




4. Click **Yes** to confirm you want to resend:




Important: Resending a Translation Job starts a new translation cycle and removes the connection between the Translation Job in Content Manager and the translation management system, therefore existing a Translation Jobs on the translation management system will be orphaned and must be manually deleted.

### Result

You have resent the Translation Job. The Translation Job is now in the **Ready for Translation** state awaiting transferral to the translation management system.

### Next steps

You can track the progress of the Translation Job in the **Translation Progress** tab of the Translation Job.

## 18.9 Retrieving a Translation Job (on retrieve error)

Errors can occur during the sending and retrieving of a Translation Job to or from the translation management system. The state of a Translation Job is set to **Error retrieving** when an error is encountered returning Translation Jobs to the Content Manager.

### Requirements

To retry retrieving a Translation Job it must be in the **Error retrieving** state and you must have Translation Management rights and one other Content Manager right to a Publication that is a target for the translated content.

### Context

When errors occur during the **In Translation** state—while the Translation Jobs are being received by the Content Manager—Translation Manager sets the state of the Translation Job to **Error retrieving**.

Retrieve errors can be Global errors to do with the Translation Job on the Content Manager or the equivalent jobs on the translation management system, or validation errors concerning individual Content Manager items.

The Translation Manager automatically tries to retrieve individual items that have failed every 24 hours, or you can manually force the process using the **Retry retrieving** option.

### Steps to execute

1. In the Content Manager, select the **Translation Jobs** node in **Shortcuts**.
2. Select a Translation Job from the list and choose **Open** from the context menu.
3. Click the **Error** tab. Details are displayed in the **Error Details** section.
4. Fix the errors, for example:
   - Translation Manager Job ID
   - The translation management system Job ID
   - Content Manager item ID
5. In the Translation Jobs node, select a Translation Job in the **Error retrieving** state and choose **Retry retrieving** from the context menu.

### Result

You have forced the Translation Manager to retry retrieving each individual item that has previously failed in a Translation Job:

- The state of the Translation Manager is set to **In Translation**.
- If it fails to receive one or more items again, it sets the Translation Job to the **Error sending** state. In this state, the Translation Manager will try to retrieve the failed items every 24 hours. (It will also continue to try to receive items that have *not failed*, that is, items that have not yet been sent back from translation.)

### Next steps

You can track the progress of the Translation Job in the **Translation Progress** tab of the Translation Job.

## 18.10 Deleting a Translation Job

You can delete Translation Jobs whose status is **Definition**, **Canceled**, **Error sending** or **Error retrieving** directly in the Translation Jobs Queue.

### Requirements

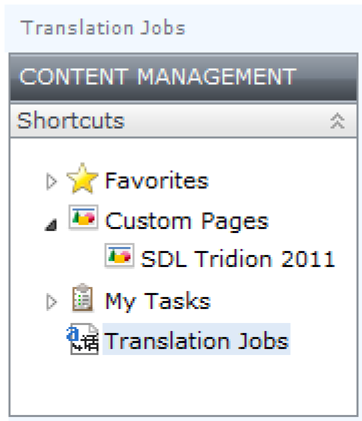
To delete a Translation Job you must have Translation Management rights and one other Content Manager right to a Publication that is a target for the translated content.

## Context

Any user who is authorized to initiate translations and who has access permissions to the Publication which is a target, or potential target, of translated content can delete an existing Translation Job.

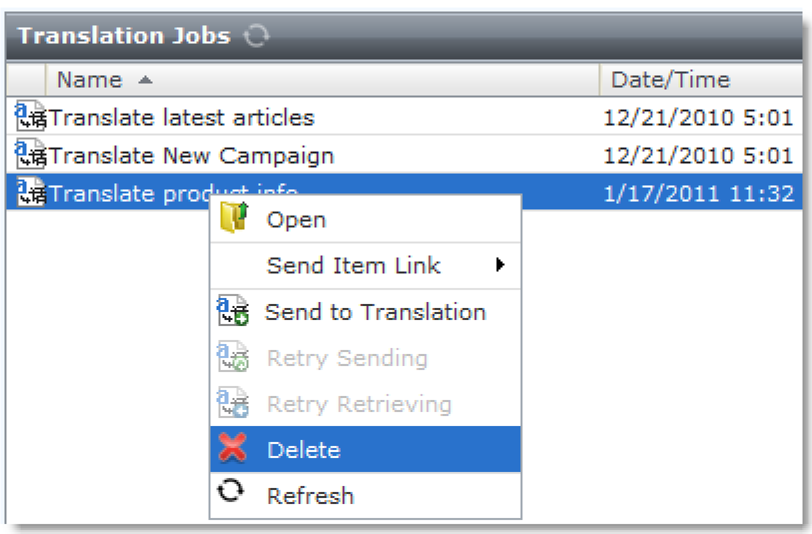
## Steps to execute

1. In the Content Manager, go to the **Translation Jobs** node:




A list of Translation Jobs is displayed.

2. Select a Translation Job from the list and choose **Delete** from the context menu:



### Result

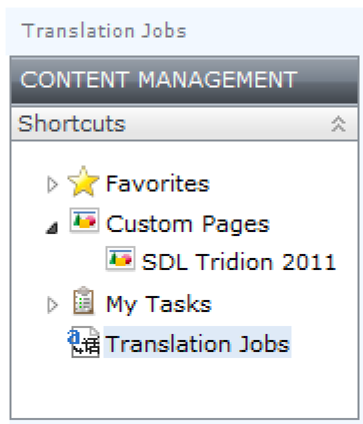
The Translation Job is deleted.

## 18.11 Monitoring translation progress

You can view the progress of items in translation in the **Translation Progress** tab of a Translation Job. You can see the progress for each of the target languages and a breakdown of what Content Manager items are in what (workflow) stage of the translation process and the percentage completion.

### Steps to execute

1. In the Content Manager, select the **Translation Jobs** node in **Shortcuts**:

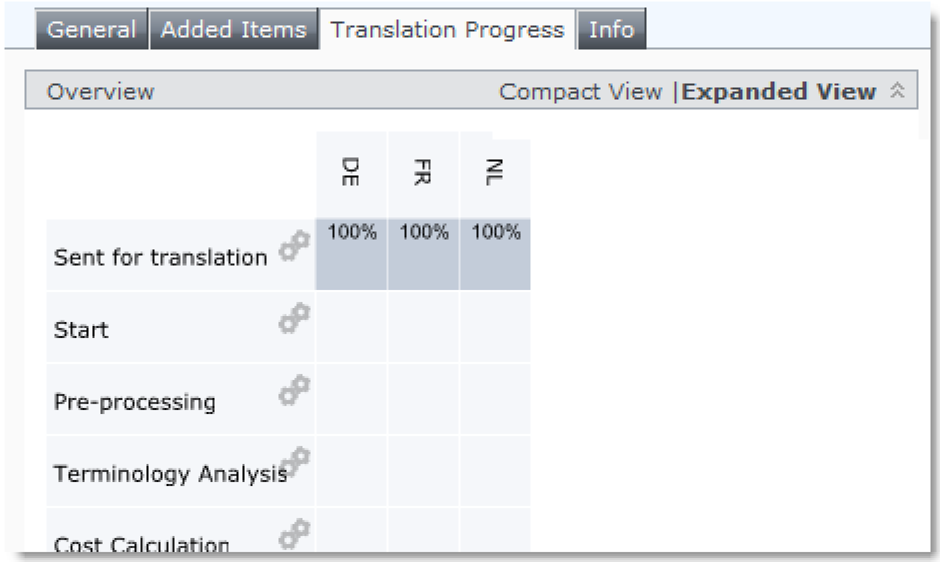
   
   

   A list of Translation Jobs is displayed in the list view.

2. Select a Translation Job from the list and choose **Open** from the context menu.

   The **Translation Job** dialog appears.

3. Open the **Translation Progress** tab:




The **Translation Progress** tab displays:

- rows for each stage in the process of translating an item in a Translation Job
- columns for each language you chose to translate to (from a target language)

The percentage completion displayed for each stage and language is based on the number of Content Manager items in that stage. When using aggregation—where content from several XML files is merged into a single XML document—the percentages do not match what you see in the translation management system.

The icon displayed next to the stage indicates whether it is an automated or manual process:

| Icon | Description |
|---|---|
|  | Automated process |
|  | Manual process |

4. Click **Compact View** to view just the manual stages and stages which contain items.

5. Click **Expanded View** to view all stages involved in the translation process. An item in a Translation Job can be in one of the following stages:

**Sent for Translation**

The item remains in this stage until the first time Translation Manager pulls the actual status from the translation management system.

**Translation Workflow stages**

The item can be in any Workflow stage defined in the translation management system, up to and including the **Translated Content Retrieval** stage. The Workflow stages are configurable on your translation management system. Translation Manager displays all Workflow stages merged into one list, therefore some stages may be included in the list but are not used by all items. Note also that a Workflow stage may also be placed out of sequence in the list.

**Complete**

The item is in a stage after the **Translated Content Retrieval** stage, including the **Completed** stage. Translation Manager sets the (SDL Tridion) Translation Job to **Complete** once all items have passed the **Translated Content Retrieval** stage, even if there are additional Workflow stages in the translation management system before they reach the **Complete** stage.

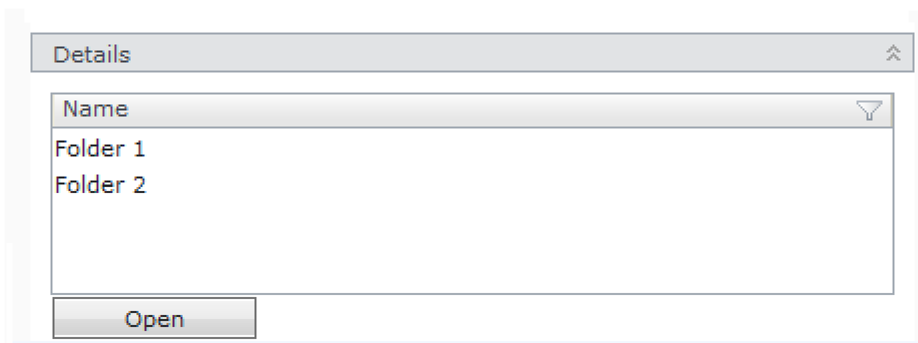
**Exceptions**

The item is in the **Exception** or **Recovery** stage in the translation management system. The item can be retrieved when the error is corrected.

**Terminated**

The item has been canceled and will not be returned.

6. In the **Compact View** or **Expanded View**, select a stage from the list. The **Details** window displays items that are currently in that stage of translation:




7. In the **Details** window, select an item and click **Open** to view the item.

# Chapter 19 Audience Manager and Outbound E-mail

Audience Manager enables marketing departments to gather information about audiences, such as interests and characteristics. Outbound E-mail is for marketing departments that need to implement and manage e-mail communication campaigns.

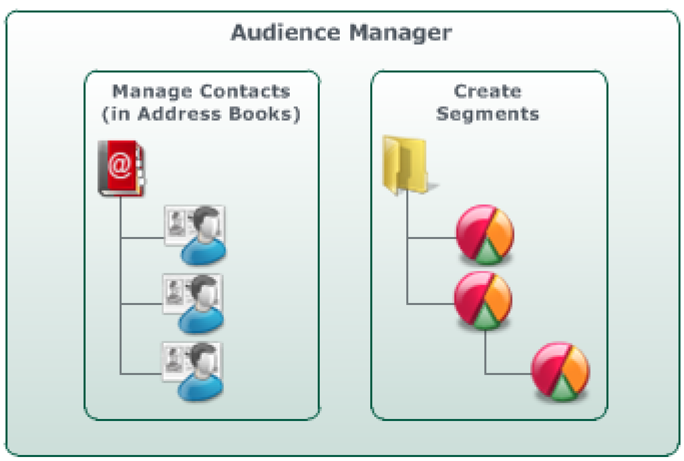
## 19.1 Audience Manager

Audience Manager enables marketing departments to gather information about audiences, such as interests, preferences, and characteristics and use this information to target audiences.

Audience Manager consists of Contacts and Segments:

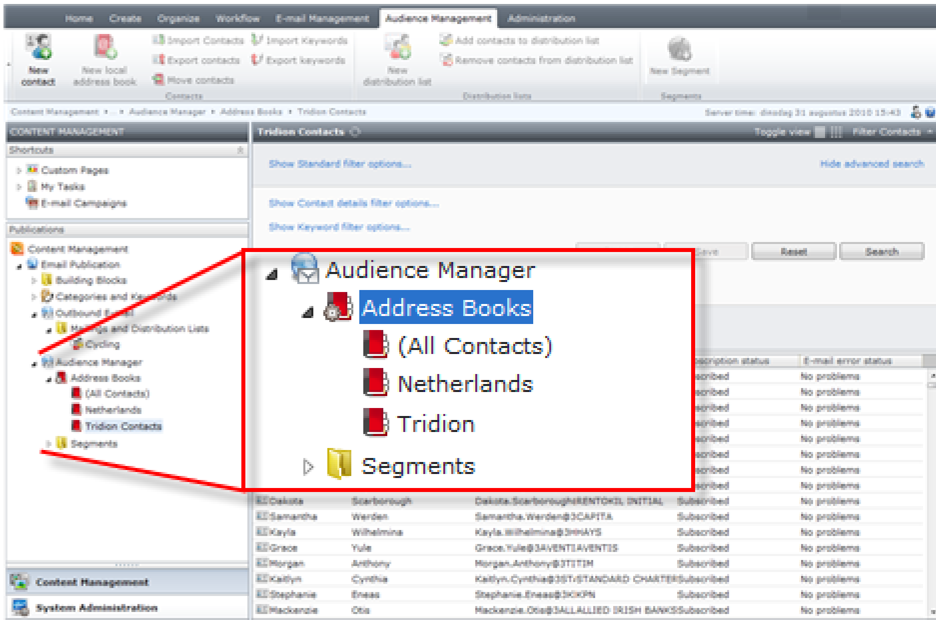
- A Contact contains details of an actual person or organization. Contacts are stored in Address Books.
- A Segment defines Contact preferences, interests and characteristics that represent a target audience of known Contacts accessing content on your Web sites.

The following diagram provides an overview of Audience Manager:




### 19.1.1 Audience Manager user interface

The **Audience Manager** node in a Publication contains Content Manager items specific to Audience Manager. The node is accessible to users who have Audience Manager rights, as defined by a Tridion system administrator.



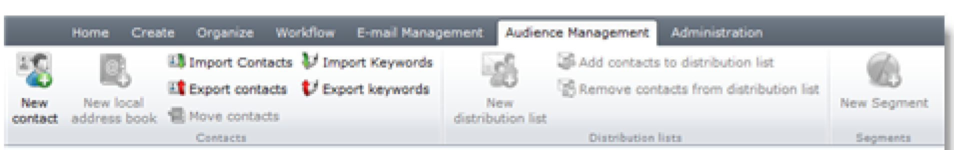

### Audience Manager items

The **Audience Manager** node contains the following items:

| Icon | Item Type | Description |
|---|---|---|
| | Address Book | An Address Book contains a list of Contacts. If the Publication contains two or more Address Books, an **(All Contacts)** node is added which contains all Contacts in the Publication. Address Books are added to a Publication by a Tridion System Administrator. |
| | Contact | A **Contact** contains a customer's personal details and Mailing history. |
| | Folder | Folders in the Audience Manager node are used to organize Segments. |
| | Segment | A **Segment** is a logical grouping of people that represent a target audience. |

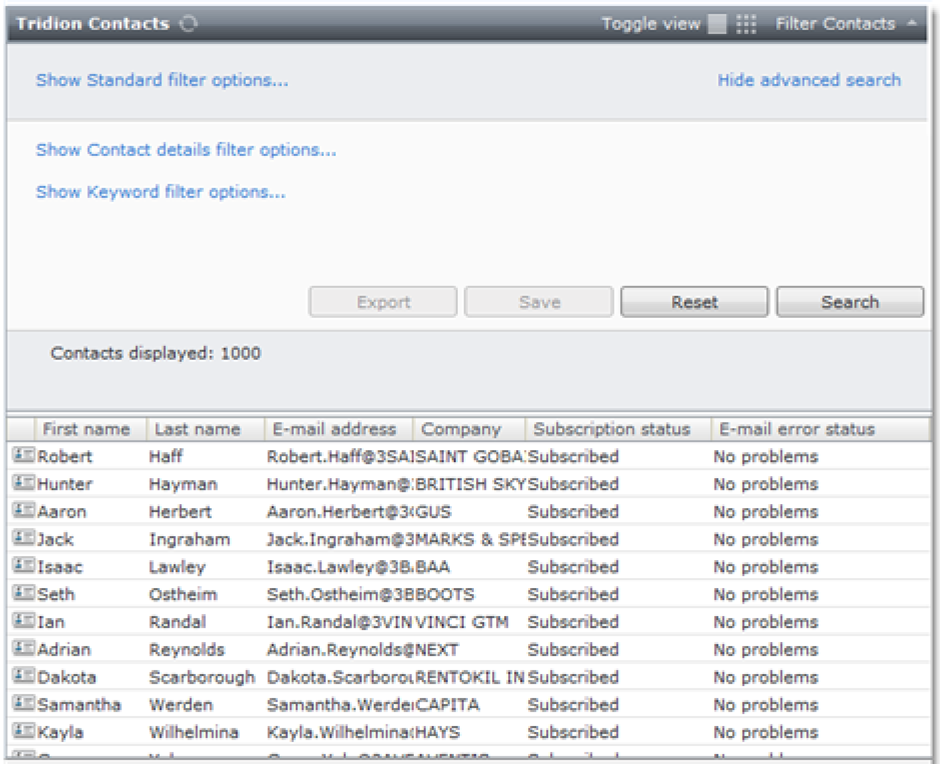
### Audience Management ribbon toolbar

In the Content Manager Explorer, select **Audience Management**. The tab shows tasks you can perform in the **Audience Manager** node in a Publication. Tasks are enabled or disabled depending on your current context:




### Search and List View

Select an Address Book in the navigation pane to view its Contacts. Define search criteria and click **Search** to filter the list, in which case the list view displays the Contacts is the list who meet the criteria. You can save a filtered list as a Distribution List or export the Contacts:




## 19.1.2 Audience Manager rights and permissions

**Rights** determine the type of items (for example Contacts or Segments) you may work with and **Permissions** determine what actions you can perform on the items for which you have rights (for example, whether you may view, create, or delete Contacts or Segments).

Your system administrator assigns you with specific rights for each Publication that you work in:

- To work with Contacts, you need Contact Management rights and Read/Write/Delete permissions set on the parent Address Book.
- To work with Segments, you need Segmentation Management rights and Read/Write/Delete permissions set on the parent Folder.
- To work with Folders in the **Audience Manager node**, you need Outbound E-mail Folder Management rights and Read/Write/Delete permissions set on the parent Folder.

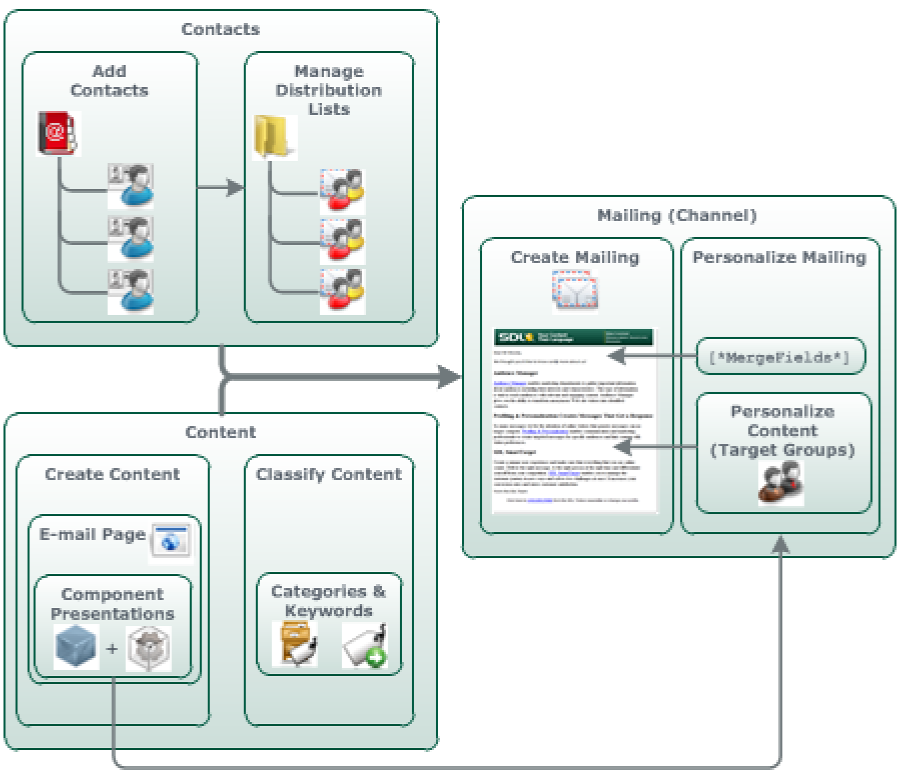
## 19.2 Outbound E-mail

Outbound E-mail is for marketing departments that need to implement and manage e-mail communication campaigns. It enables marketing departments to deliver personalized e-mails to specific audiences and track the effectiveness of their communication.

Outbound E-mail users need to perform the following tasks to manage e-mail communication campaigns:

1. Creating and managing **Contacts**
2. Creating and classifying **Content**
3. Combining Contacts and Content into **Mailings** and optionally combine Mailings into **E-mail Campaigns**

The following diagram provides an overview of user tasks for Outbound E-mail:




This chapter provides an overview of managing Contacts, creating Content and combining these items into Mailings in the Content Manager user interface.

### 19.2.1 Creating and sending e-mails

Creating and sending e-mails in Outbound E-mail involves managing **Contacts**, creating **Content** and combining these into a **Mailing**:

1. **Contacts** are the people you send mailings to:
   - You add Contacts to **Address Books**. An Address Book represents a market segment or interest group.
   - You target the intended audience of a mailing by creating **Distribution Lists** that contain a subset (selection) of your Contacts.

2. **Content** involves the creation and classification of e-mail content:
   - You create an e-mail as follows:
     - Create **Components**—each Component defines a part of an e-mail (an e-mail fragment)
     - Create a **Page**—a Page combines content (Components) with layout (Page and Component Templates)
     - Specify **Target Groups**—when you add a Component to the Page, you can also specify which Target Group(s) the content applies to
   - You classify content using **Categories and Keywords**. You create Categories and Keywords to:
     - Classify Content—the primary purpose of Categories and Keywords in Content Manager is to classify and tag content (Components). Classifying your content helps you find related content.
     - **Classify Contacts**—the secondary purpose of Categories and Keywords, which is most relevant to Outbound E-mail, is to specify Contact preferences and interests which you can then use to create Dynamic Distribution Lists and define Target Groups (categories of users) to match Component Presentations to these Target Groups

3. **Mailings** combine **Contacts** and **Content**. You can also **Personalize a Mailing** by adding personal details to the e-mail and tailoring the contents of an e-mail message to specific categories of users:
   - Use **Merge Fields** (in template code or other text fields) to indicate where Outbound E-mail should insert Contact specific information such as name and surname.
   - Use **Target Groups** to define categories of users (mail recipients) which you can then use to include or exclude certain parts of a Mailing (Component Presentations on an E-mail Page) to. Target Groups allows you to personalize the content of the Mailing to suit the Contact's profile: different versions of the same Mailing are sent to different Contacts.

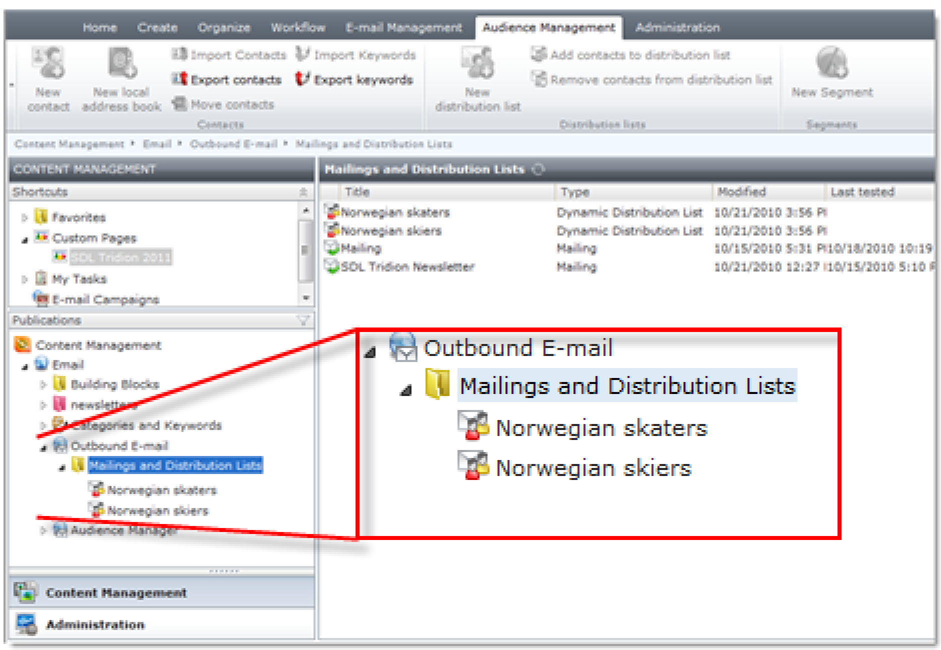
4. An **E-mail Campaign** allows you to coordinate a Mailing campaign by grouping several Mailings together and testing and sending them in one go. You can add Mailings from multiple Publications in an E-mail Campaign. An E-mail Campaign allows you to:
   - Coordinate the sending of a single e-mail across multiple Publications
   - Coordinate the sending of a series of e-mails consisting of, for example, a Start Mailing, Scheduled Mailing, Triggered Mailing and Reminder Mailing

When you have sent a Mailing, you can view the response of your Contacts to the Mailing and use this information to get an impression of who is interested in your e-mail and what kind of content interests them. You can use this information to create Distribution Lists, allowing you to send a more targeted Mailing.

Note: Address Books are created by Tridion System Administrators who then make them available to users in Outbound E-mail Publications.

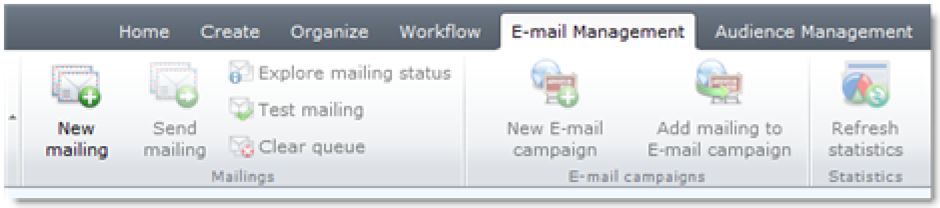
## 19.2.2 Outbound E-mail user interface

The **Outbound E-mail** node in a Publication contains Content Manager items specific to Outbound E-mail. The node is accessible to users who have Outbound E-mail rights, as defined by a Tridion system administrator.




**E-mail Management ribbon toolbar**

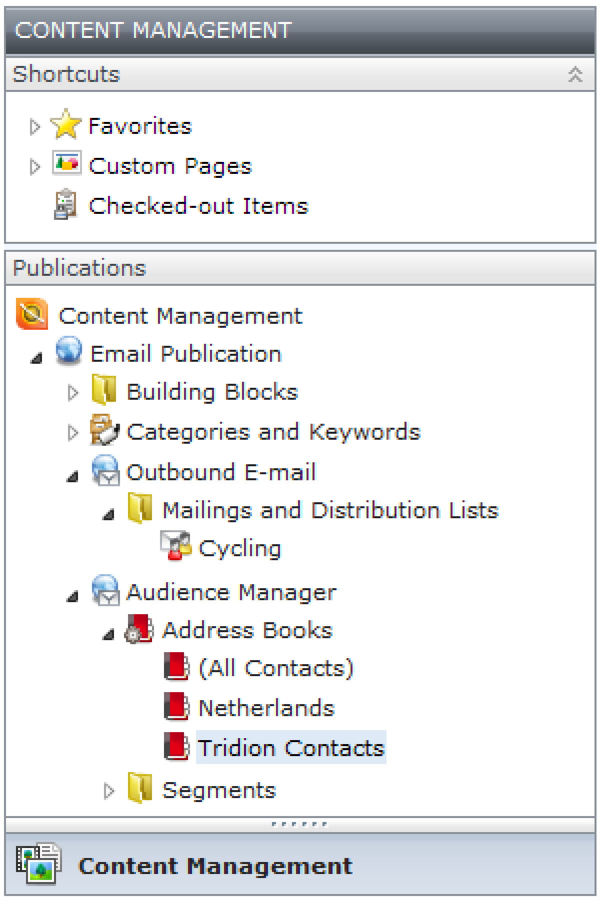
In the Content Manager Explorer, select **E-mail Management**. The tab shows tasks you can perform tasks in the **Outbound E-mail** node in a Publication. Tasks are enabled or disabled depending on your current context:




### Outbound E-mail node

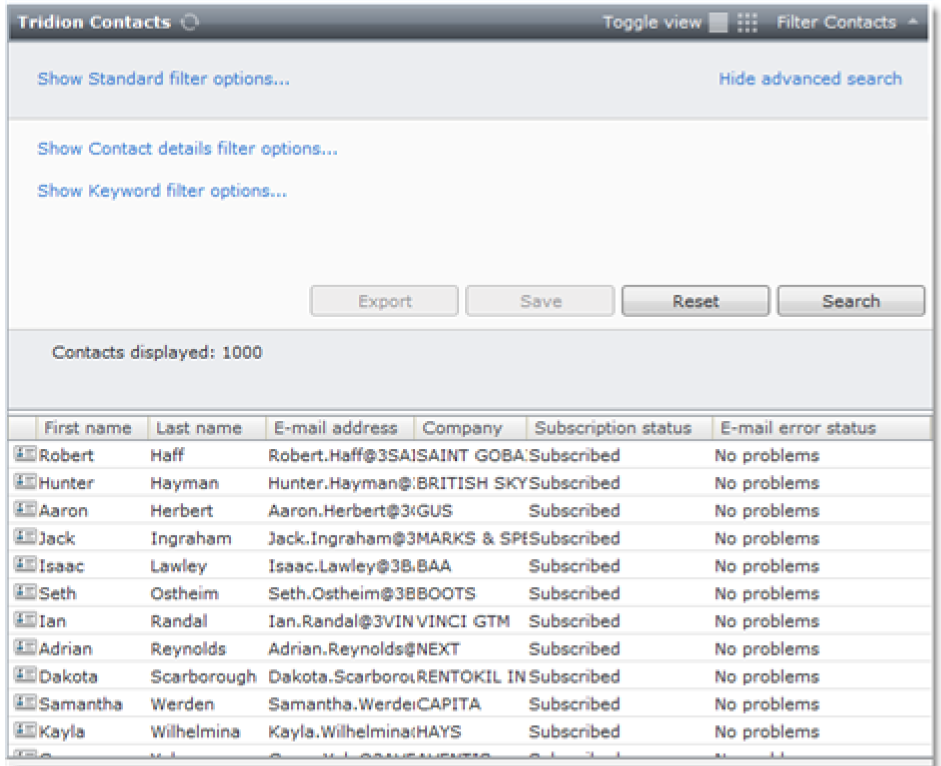
The **Content Management** navigation pane on the left-hand side displays Publications and Shortcuts:

- Open a Publication to view the **Outbound E-mail node** in which you create Mailings and Distribution Lists and organize them into Outbound E-mail Folders.
- Open **E-mail Campaigns** to view E-mail Campaigns.




### Search and List View

Select a Distribution List in the navigation pane to view its Contacts. Define search criteria and click **Search** to filter the list, in which case the list view displays the Contacts is the list who meet the criteria. You can save a filtered list as a Distribution List or export the Contacts:




### Outbound E-mail icons

The **Outbound E-mail** node contains the following items:

| Icon | Item Type | Description |
|---|---|---|
| | Outbound E-mail Folder | Outbound E-mail Folders are used to organize Mailings and Distribution Lists. |
| | Distribution List | A **Distribution List** defines the recipients of a Mailing. |
| | Mailing | A **Mailing** combines Content (an E-mail Page) and Contacts (Distribution Lists). |

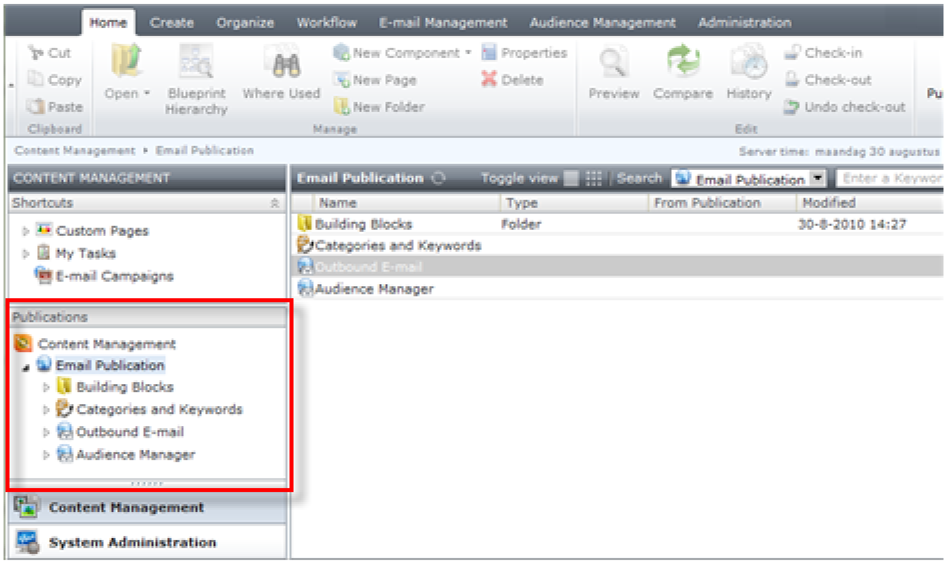
At Publication level, the **E-mail Campaigns** node can contain the following items:

| Icon | Item Type | Description |
|---|---|---|
| | E-Mail Campaign | An **E-mail Campaign** allows you to group Mailings to coordinate the sending and testing of Mailings across Publications and/or to group a series of related Mailings that comprise a campaign together. |

## 19.2.3 Content Manager Explorer interface

Your interface to Outbound E-mail is the Content Manager Explorer.

The following image shows the top-level nodes in a Publication:




The following table describes the top-level nodes in a Publication and explains how to use them in Outbound E-mail:

| Icon | Item Type | Description |
|---|---|---|
| | Publication | A Publication intended for the Mailing channel (contains Outbound E-mail items as well as other Content Manager items) |
| | Building Blocks (Folders) | Folders are organizational items that contain, amongst others, **Components** which define the content for Mailings and **Target Groups** which are used to personalize Mailing content |
| | Structure Groups | Organizational items that contain **Pages** to define the Content (Components) and layout and functionality (Templates) used in a Mailing |
| | Categories & Keywords | Keywords which are used to classify content (Components) and Contacts |
| | Outbound E-mail | A Container node for all Outbound E-mail specific items. See Outbound E-mail user interface (see page 226) |
| | E-Mail Campaigns | A Container node for E-mail Campaigns. |

Note: This manual describes the Content Manager items that are directly concerned with Outbound E-mail. For more information on Content Manager functionality, see the SDL Tridion documentation.

## 19.2.4 Outbound E-mail rights and permissions

**Rights** determine the type of items (for example Mailings or Distribution Lists) you may work with and **Permissions** determine what actions you can perform on the items for which you have rights (for example, whether you may view, create, or delete Mailings or Distribution Lists.

Your system administrator assigns you with specific rights for each Publication that you work in:

- To work with Distribution Lists, you need Distribution List Management rights and Read/Write/Delete permissions set on the parent Folder.
- To work with Mailings, you need Mailing Management or Mailing Execution rights and Read/Write/Delete permissions set on the parent Folder.
- To work with Folders in the **Outbound E-mail node**, you need Outbound E-mail Folder Management rights and Read/Write/Delete permissions set on the parent Folder.

### 19.2.5 Legal notice

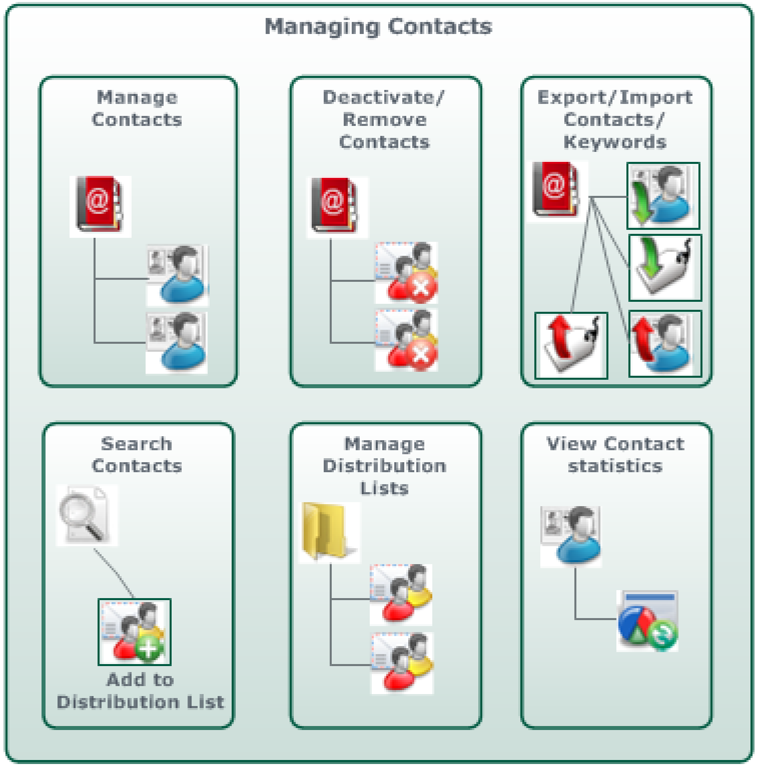
Please note that use of the Outbound E-mail may require compliance with national, European and/or international data protection laws and privacy laws.

It is the responsibility of the processor of the data to ensure compliance with any applicable law. If you intend to perform any operations on personal data, whether electronically or manually, these rules may apply to you. We advise you to investigate this issue thoroughly before using Outbound E-mail in a live environment.

## 19.3 Managing Contacts

A Contact contains the details of a person or organization. You can use Contacts for targeting and personalization.

In Outbound E-mail, you create Distribution Lists containing the Contacts you want to target in a Mailing campaign. You manage Contacts in an Address Book.




## 19.3.1 Address Books

An Address Book contains a list of Contacts.

The following types of Address Books are created by system administrators and made available to users in Publications:

- An **Address Book** contains a list of Contacts segmented according to ownership where the owner is typically an organizational unit that manages communication with these Contacts. For example, you may have Address Books for Sweden, Denmark and Norway Contacts.
- A **Dynamic Address Book** contains a list of Contacts segmented according to Contact interest, characteristic, or preference. For example you may have a Dynamic Address Book that filters Contacts based on the region Nordic.

In a Publication you can also create **Local Address Books**. A Local Address Book is a temporary Address Book which users can create and which contains a collection of Contacts imported from an external data source. A Local Address Book is intended for a one-time marketing action and are not designed to be used to manage Contacts.

## 19.3.2 Contacts

A Contact contains the details of a person or organization. When you open a Contact, you can see Mailing details in the **General** tab, Extended Details in the **Details** tab, characteristics in the **Keywords** tab, and Mailings sent to the Contact in the **E-mails** tab.

A Contact contains the following information about a person or an organization:

- **General**—mailing information such as a Contacts's e-mail address, the format the e-mail should be sent in, the subscription status, e-mail error status, and whether the Contact is active of not.
- **Details**—specific information about a Contact, such as name, surname, phone number, and so on.
- **Keywords**—properties or attributes of a Contact that define a Contact's preferences and interests, such as a preferred brand of car or hobbies. A Contact may have multiple Keywords from one or more Categories.
- **E-mails**—the Mailings sent to the Contact and the status of the Mailings.

## 19.3.3 Contact filtering

In Audience Manager and Outbound E-mail you can segment and target audiences (Contacts) using filters. A filter defines Outbound E-mail fields, extended detail fields, or Keywords that you want to filter Contacts on.

You use the same filters to define Dynamic Address Books, Dynamic Distribution Lists and Segments. You can base a Dynamic Address Book, Dynamic Distribution List or Segment on another Dynamic Address Book, Dynamic Distribution List or Segment to create a chain of filters. Each filter in a sequence further refines the filtered Contacts on which it is based.

Chaining filters allows you to create generic filters and use these to create more specific filters. You can create a chain of filters as follows:

- You can base a Dynamic Address Book on another Dynamic Address Book
- You can base a Dynamic Distribution List on a Dynamic Address Book, on another Dynamic Distribution List, or on a Segment
- You can base a Segment on another Segment

Each filter in a chain of filters is applied sequentially. For example, if you apply the following filters in a chain:

1. Filter A "Subscription status=Subscribed"

2. Filter B "Nationality=Italian"

3. Filter C "Gender=Women"

4. Filter D "Age=18-30"

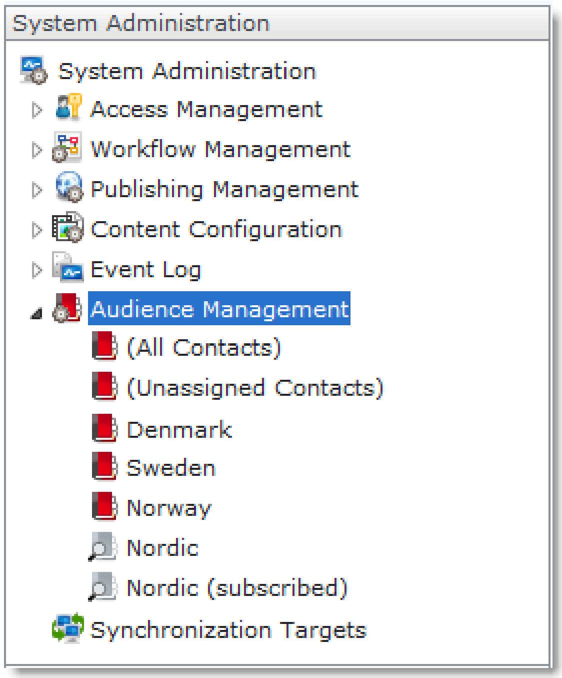
5. Filter E "Preferred Clothing=Jeans"

Filter B is applied to the result set of Filter A, Filter C to the result set of Filter B and so on down the chain. Filter E will therefore filter a list of Contacts on Italian women aged between 18 and 30 who have subscribed to e-mails and who have stated a preference for wearing jeans.

The following sections provide a detailed example of Contact filtering.

**System Administration**

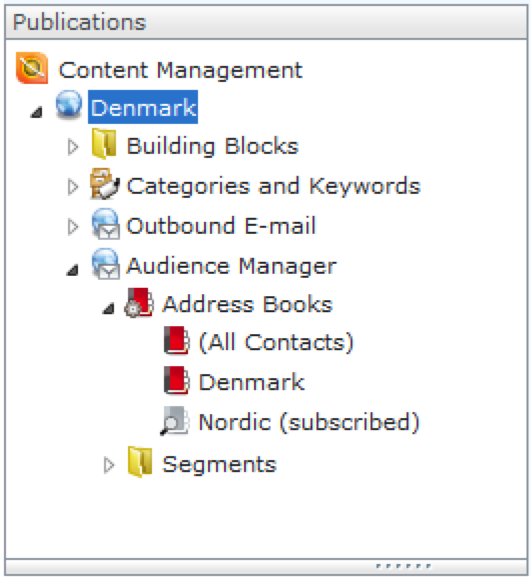
A System Administrator adds Address Books in System Administration. Address Books contain Contacts, for example **Denmark**, **Sweden**, **Norway**. Dynamic Address Books contain a subset of filtered Contacts and can be based on a single Address Books or on All Contacts. For example, **Nordic** Dynamic Address Book filters (All Contacts) on the Keyword `Nordic`. A Dynamic Address Book can also based on another Dynamic Address Books to further refines the filter. For example, **Nordic (subscribed)** Dynamic Address Book is based on **Nordic** and filters these Contacts on whether they are `subscribed` to receive e-mails.




### Publications

A System Administrator adds Address Books to Publications and defines rights and permissions for users. For example, the **Denmark** Publication has **Denmark** and **Nordic (subscribed)** Address Books assigned to it. Users with access to this Publication and Contact Management rights are allowed to read, write and delete Contacts within the **Denmark** Address Book, but *do not* have any permissions for the **Nordic (subscribed)** Address Book and therefore cannot view Contacts within this Address Book.

The **(All Contacts)** node "contains" all Contacts within the Publication but only displays the Contacts (in the Publication) for which a user has read access (so therefore in this case *not* Contacts in the **Nordic (subscribed)** Address Book:




### Dynamic Distribution Lists

Users with Distribution List Management rights and Read and Write permissions can create Distribution Lists. Distribution Lists filter Contacts in a single Address Book or All Address Books available within a Publication. You can create a Dynamic Distribution List based on a Segment, Address Book or Dynamic Address Book:

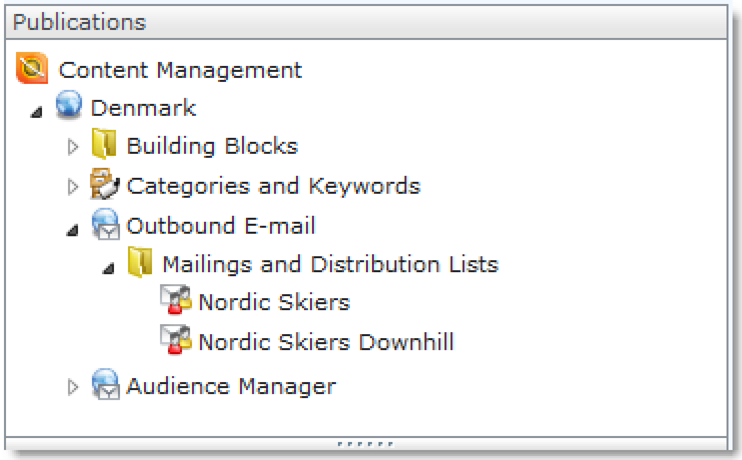
- If you select a Segment, the filters defined in the selected Segment are used in addition to other filters you may define and act on all Contacts within the Publication.
- If you select a Dynamic Address Book, the filters defined in the selected Dynamic Address Book are used in addition to other filters you may define and act on Contacts within this Address Book.
- If you select a regular Address Book, the filters you define act on Contacts within this Address Book.
- If you make no selection (none), the filters act on all Contacts within the Publication.

For example, the **Nordic Skiers** Dynamic Distribution List is based on the **Nordic Subscribed** Address Book and uses the Keyword `Skiers` to filter these Contacts. The complete filter therefore filters Contacts on `Nordic->Subscribed->Skier`. Additionally, the **Nordic Skiers Downhill** Dynamic Distribution List filters the **Nordic Skiers** Dynamic Distribution List on the Keyword `Downhill`. The complete filter therefore filters Contacts on `Nordic->Subscribed->Skier->Downhill`.

It is important to understand that when you select **(All Contacts)** and make a filter using the Keyword `Skiers` you will only see Danish Skiers (subscribed and unsubscribed) because you do not have read access to **Nordic (subscribed)**. However, if your create a Dynamic Address Book based on this search the Distribution List will contain:

- Swedish subscribed Skiers
- Norwegian subscribed Skiers
- Danish subscribed and unsubscribed Skiers

In other words, when you select a Distribution List you can see all Contacts that can potentially receive the Mailing, regardless of whether you have permissions to read the Contacts or not.




**Mailings**

When you create a Mailing, you need to specify the Distribution Lists you want to send the mailing to. You must also specify the Address Books to which the Contacts in your Distribution Lists must belong (a Contact must therefore be in a selected Distribution List and Address Book to receive a Mailing).

## 19.3.4 Creating a Contact

You can manually add a Contact to an Address Book in the context of one-on-one customer contact.

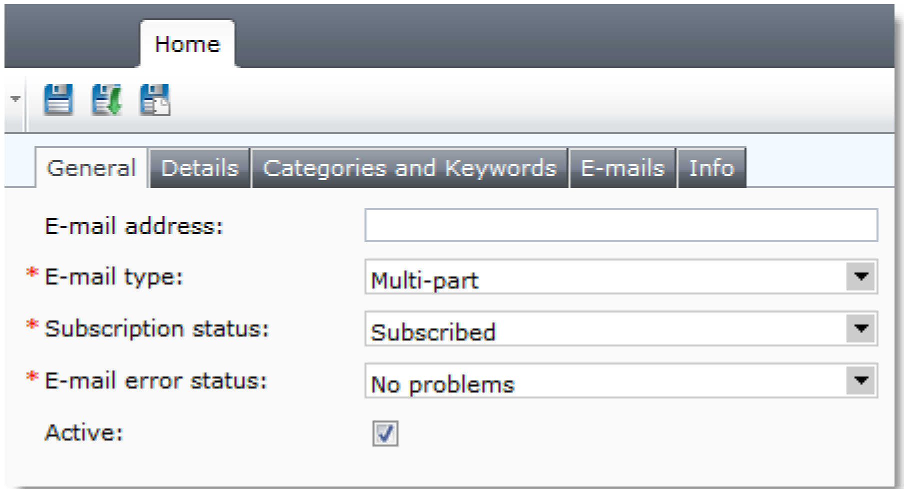
### Requirements

To create or update Contacts, you need Contact Management rights and Write permissions for the Address Book.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. Select an Address Book and click the New Contact icon in the toolbar.

   The Contact window appears:




4. In the **General** tab, fill in or modify the Mailing details:
   - **E-mail address**—the person’s e-mail address
   - **E-mail type**—the Contact’s preferred e-mail format:
     - **HTML**—using HTML, you can format the text of your e-mail and include images and clickable links. However, not all of your Contacts may be able to see the HTML-format e-mail. This is the default value.
     - **Text**—using plain text, you can be sure that the recipient of the e-mail can read the message, but you lose the ability to format your e-mail message.
     - **Multi-part**—HTML and plain text combined in a multi-part e-mail message. The e-mail client of the recipient determines which format the recipient will see.
   - **Subscription status**—indicates the status of a Contact's subscription:
     - **Opted-in**—the Contact registered as a subscriber and confirmed the registration.
     - **Subscribed**—the Contact registered as a subscriber, but did not yet confirm the registration.
     - **Unsubscribed**—the Contact would not like to receive e-mail.
   - **E-mail error status**—indicates whether problems have been encountered sending e-mails to the Contact:
     - **No problems**—e-mails sent to this Contact should arrive without incident.
     - **Temporary problems**—e-mails sent to this Contact have encountered temporary problems, for example, the Contact’s e-mail Inbox was full.
     - **Persistent problems**—e-mails sent to this Contact have encountered permanent problems, for example the e-mail address of the Contact does not exist.
   - **Active**—clear this check box to prevent this Contact from receiving e-mails.
5. In the **Details** tab, fill in or modify the Contact's extended details.

Note: Mandatory extended details fields are marked with an asterisk. Extended details are configurable and implementation specific.

6. In the **Categories and Keywords** tab, add or remove a Contact's Keywords:

   a. Click **Add**.

   b. Browse to and select a Keyword.

   c. Click **Insert**.

   d. Repeat the procedure to add more Keywords.

   e. Click **Close** when you have finished adding Keywords.

   f. To remove a Keyword, select it click the **Remove** button.

   Note: The list of **Keywords** displayed does not reflect Keyword hierarchy (the Keywords are displayed in a flat list). You can use multiple Keywords, from several Categories and in different Publications. A Contact can also have multiple Keywords from the same Category, for example, if a Contact is both a Business Contact and a Consumer Contact, both Keywords apply.

   Note: If a Category and Keyword in the list are both marked `***DELETED***`, the Keyword has been deleted.

7. Click **Save and Close** .

**Result**

You have created a Contact.

### 19.3.5 Updating a Contact

You can edit an existing Contact for example if you want to correct a mistake you find in an individual Contact's information or simply update the details.

**Requirements**

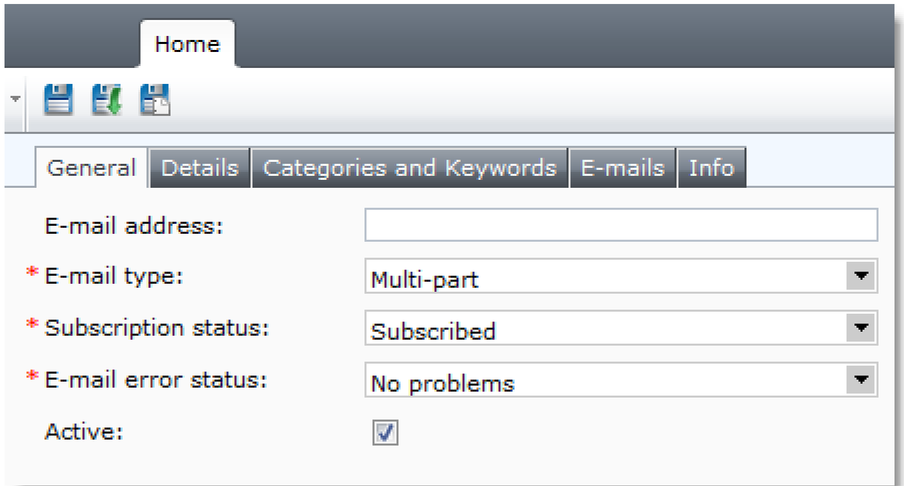
To create or update Contacts, you need Contact Management rights and Write permissions for the Address Book.

**Steps to execute**

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.

3. Select the Contact in an Address Book or Distribution List and choose **Open** from the context menu,.

   The Contact window appears:




Note: Use the Contact search functionality in an Address Book or Distribution List to locate a Contact.

4. In the **General** tab, fill in or modify the Mailing details:
   - **E-mail address**—the person’s e-mail address
   - **E-mail type**—the Contact’s preferred e-mail format:
     - **HTML**—using HTML, you can format the text of your e-mail and include images and clickable links. However, not all of your Contacts may be able to see the HTML-format e-mail. This is the default value.
     - **Text**—using plain text, you can be sure that the recipient of the e-mail can read the message, but you lose the ability to format your e-mail message.
     - **Multi-part**—HTML and plain text combined in a multi-part e-mail message. The e-mail client of the recipient determines which format the recipient will see.
   - **Subscription status**—indicates the status of a Contact's subscription:
     - **Opted-in**—the Contact registered as a subscriber and confirmed the registration.
     - **Subscribed**—the Contact registered as a subscriber, but did not yet confirm the registration.
     - **Unsubscribed**—the Contact would not like to receive e-mail.
   - **E-mail error status**—indicates whether problems have been encountered sending e-mails to the Contact:
     - **No problems**—e-mails sent to this Contact should arrive without incident.
     - **Temporary problems**—e-mails sent to this Contact have encountered temporary problems, for example, the Contact’s e-mail Inbox was full.

    - **Persistent problems**—e-mails sent to this Contact have encountered permanent problems, for example the e-mail address of the Contact does not exist.
  - **Active**—clear this check box to prevent this Contact from receiving e-mails.

5. In the **Details** tab, fill in or modify the Contact's extended details.

   Note: Mandatory extended details fields are marked with an asterisk. Extended details are configurable and implementation specific.

6. In the **Categories and Keywords** tab, add or remove a Contact's Keywords:

   a. Click **Add**.

   b. Browse to and select a Keyword.

   c. Click **Insert**.

   d. Repeat the procedure to add more Keywords.

   e. Click **Close** when you have finished adding Keywords.

   f. To remove a Keyword, select it click the **Remove** button.

      Note: The list of **Keywords** displayed does not reflect Keyword hierarchy (the Keywords are displayed in a flat list). You can use multiple Keywords, from several Categories and in different Publications. A Contact can also have multiple Keywords from the same Category, for example, if a Contact is both a Business Contact and a Consumer Contact, both Keywords apply.

      Note: If a Category and Keyword in the list are both marked `***DELETED***`, the Keyword has been deleted.

7. Click **Save and Close** .

## Result

You have updated a Contact.

Note: Updating a Contact's details may result in changes to their membership of (dynamic) Distribution Lists.

## 19.3.6 Deactivating and deleting a Contact

You can deactivate or delete a Contact. Deactivation prevents a Contact from receiving Mailings, but keeps the Contact in an Address Book so that you still have access to the Contact’s profile and Mailing response history. Removal permanently deletes the Contact from an Address Book (and the system).

### Requirements

To deactivate or delete a Contact, you need Contact Management rights and Write permissions for the Address Book.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. To deactivate a Contact:
    a. Select an Address Book.
    b. In the list view, select a Contact and choose **Open** from the context menu.
    c. In the **General** tab, clear the **Active** check box to prevent this Contact from receiving e-mails.
    d. Click **Save and Close**.
4. To delete a Contact:
    a. Select an Address Book.
    b. In the list view, select one or more Contacts and choose **Delete** from the context menu or click the **Delete** button in the toolbar.
    c. When prompted to confirm deletion, click **Yes** to delete the Contact.

### Result

The Contact is deactivated or removed. When you remove a Contact the Mailing statistics are unaffected, although you cannot view statistical information for that particular Contact.

## 19.3.7 Searching Contacts

You can perform a search of Contacts in an Address Book or Distribution List to retrieve a list of Contacts that meet a certain criteria. Search functionality allows you to check and modify a customer's contact details, check a Contact's Mailing history and their response to a Mailing, and target mailings by creating Distribution Lists.

### Requirements

To search Contacts in an Address Book, you need Contact Management rights and Read permissions for the Address book.

To search Contacts in a Distribution List, you need Distribution List Management rights and Read permissions for the Outbound E-mail Folder.

### Context

You can search for Contacts using the following search filters which you can choose to show or hide in the user interface:

**Standard filters**

General Contact Mailing information.

**Contact details filters**

Specific information about a person or organization.

**Keyword filters**

Specific Contact preferences, characteristics, or interests.

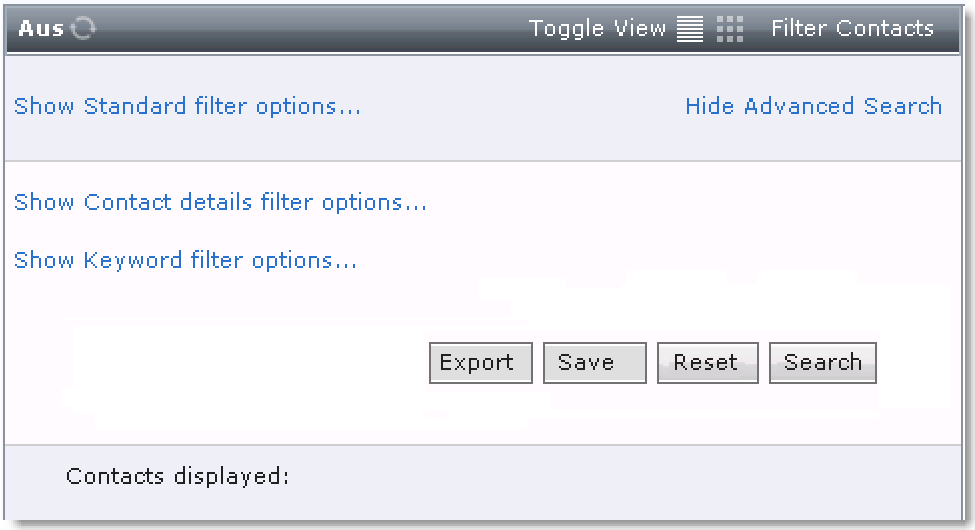
The result of a search is a list of Contacts that meet the criteria defined in the search criteria. Search functionality allows you to perform the following tasks:

- Check and modify a customer's contact details
- Check a Contact's Mailing history and their response to a Mailing
- Target mailings by creating Distribution Lists

### Steps to execute

1. Open the Content Manager Explorer.
2. Select an Address Book or Distribution List to view the search filters:
    - Navigate to the **Publication** > **Audience Manager** node and select an Address Book. Select the **(All Contacts)** node if you want to perform a search on all Contacts in all Address Books in the Publication.
    - Navigate to the **Publication** > **Outbound E-mail** node, expand the Folders and select a Distribution List.

The search filters appear:




3. Define **Standard** filter options:
   - **E-mail address**—fill in all or part (the first characters) of an e-mail address.
   - **Based on**—for Distribution Lists only, you can filter Contacts based on filters defined in another Segment, Address Book or Dynamic Address Book (in addition to other filters you may define).
   - **E-mail type**—specify the Contact’s preferred e-mail format. Select either **HTML**, **Text**, or **Multi-part**.
   - **Subscription status**—indicates the status of a Contact's subscription:
     - **Opted-in**—the Contact registered as a subscriber and confirmed the registration.
     - **Subscribed**—the Contact registered as a subscriber, but did not yet confirm the registration.
     - **Unsubscribed**—the Contact would not like to receive e-mail.
   - **E-mail error status**—indicates whether problems have been encountered sending e-mails to the Contact:
     - **No problems**—e-mails sent to this Contact should arrive without incident.
     - **Temporary problems**—e-mails sent to this Contact have encountered temporary problems, for example, the Contact’s e-mail Inbox was full.
     - **Persistent problems**—e-mails sent to this Contact have encountered permanent problems, for example the e-mail address of the Contact does not exist.
   - **Active**—Yes or No indicating Contacts who can or cannot receive e-mails.

4. Define **Contact details** filter options using Filter operators (see page 244).

Note: Extended details are configurable and implementation specific.

5. Define **Categories and Keywords** filters to filter Contacts on their assigned Keywords:

    a. Click **Add**.

    b. Browse to and select a Keyword.

    c. Click **Insert**.

    d. Repeat the procedure to add more Keywords.

    e. Click **Close** when you have finished adding Keywords.

    f. To remove a Keyword, select it click the **Remove** button.

    Note: The list of **Keywords** displayed does not reflect Keyword hierarchy (the Keywords are displayed in a flat list). You can use multiple Keywords, from several Categories and in different Publications. A Contact can also have multiple Keywords from the same Category, for example, if a Contact is both a Business Contact and a Consumer Contact, both Keywords apply.

    Note: If a Category and Keyword in the list are both marked `***DELETED***`, the Keyword has been deleted.

6. When you finished defining search criteria, click the **Search** button.

    The list view shows a filtered list of Contacts whose details match the specified search criteria:

    - Sort the results by a specific Contact field by clicking on the corresponding column header.
    - Select a Contact and choose **Open** from the context menu to open the Contact for editing
    - Select one or more Contacts in the list view and choose **Add Contacts to Distribution List** from the context menu

Note: For performance reasons, the list view only displays 1000 Contacts. If you are looking for specific Contacts you should enhance your search criteria. If you are saving the results to a Distribution List, note that all the Contacts who meet the search criteria will receive a mailing, not just the 1000 displayed.

### Result

You have performed a search of Contacts in an Address Book or Distribution List and viewed the list of Contacts that match the search parameters you entered.

### Next steps

When you have performed a search, you can do the following:

- Click **Export** to export the filtered Contacts in the list view
- Click **Save** to create a Distribution List or Segment based on the filtered Contacts in the list view.
- Click **Reset** to view all Contacts and restart a search.

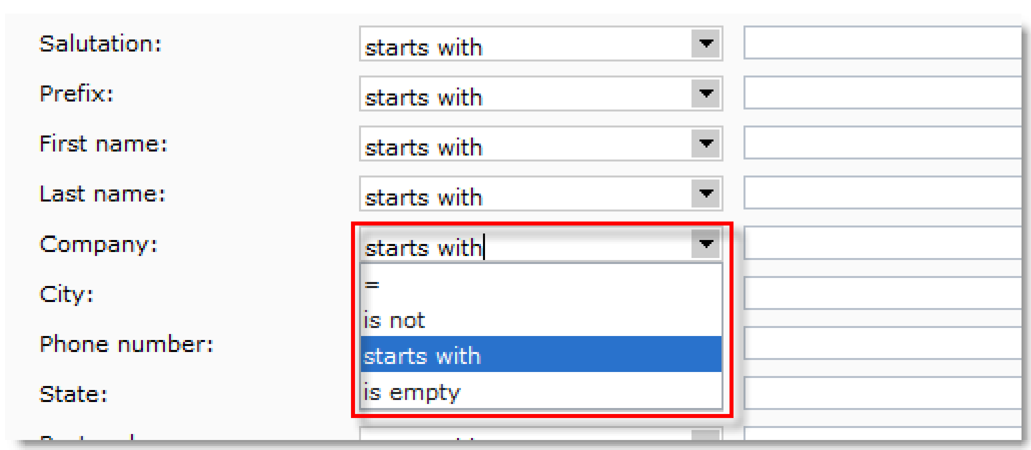
## Filter operators

Contact extended detail fields have drop-down lists that allow you to filter Contacts using operators depending on whether the fields are text strings or numeric or dates:

**Operators for Strings fields**

You can use the following operators to search for extended detail fields whose values are strings:

- **starts with** searches for Contacts whose value for this field begins with the value specified.
- **is empty** searches for Contacts who have no entry for this field.
- **is not** searches for Contacts who do not have this value (excludes Contacts with this value).
- **=** searches for Contacts whose fields matches the value specified exactly.

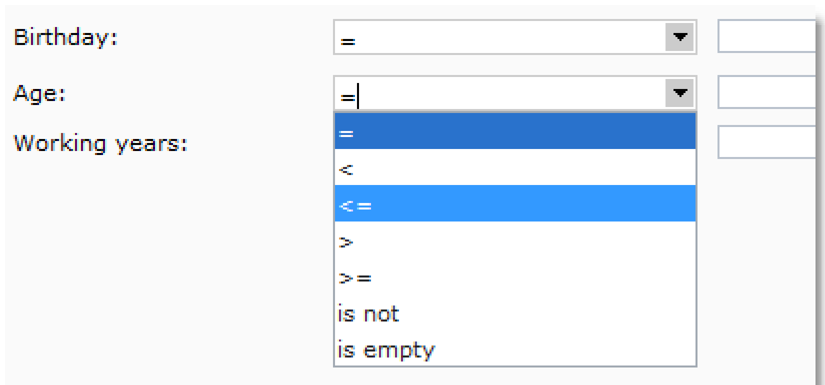



**Operators for numeric or date fields**

You can use the following operators to search for extended detail fields whose values are numeric or dates:

- **=** searches for Contacts whose fields matches the value specified exactly.
- **is empty** searches for Contacts who have no entry for this field.

- **is not** searches for Contacts who do not have this value (excludes Contacts with this value).
- **<** searches for Contacts whose value for this field is less than the value specified.
- **<=** searches for Contacts whose value for this field is less than or equal to the value specified.
- **>** searches for Contacts whose value for this field is more than the value specified.
- **>=** searches for Contacts whose value for this field is more than or equal to the value specified.




When you chose **<**, **<=**, **>**, or **>=**, a second drop-down list appears that allows you to define a range of values.

Note: Extended details are configurable and implementation specific.

## 19.3.8 Viewing Contact e-mails

For each Contact, Outbound E-mail tracks which e-mail messages the Contact receives, whether the Contact opens such e-mail, and which links within the message the Contact clicks. Outbound E-mail enables you to view these statistics for a specific Contact.

### Requirements

To view Contact statistics you need Contact Management rights and Read permissions for the Address Book.

To enable the preview of a sent e-mail, you need to have selected the **Archive personalized e-mail** check box in your Mailing.

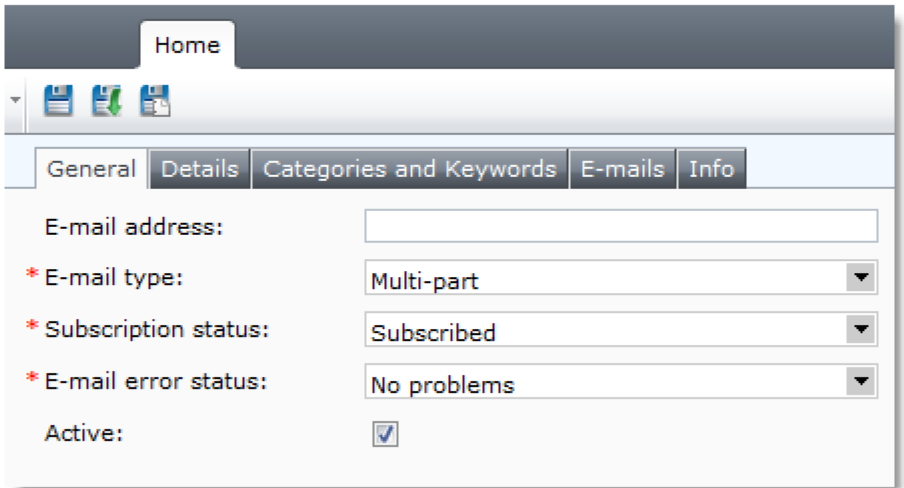
### Context

Note: You can also view Contact statistics through Mailing statistics, for which you need Mailing Execution or Mailing Management rights and Read permissions for the Outbound E-mail Folder.

## Steps to execute

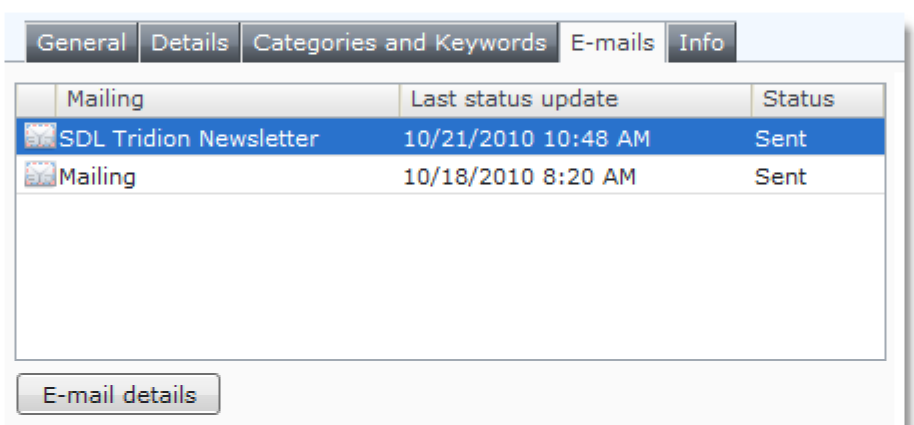
1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. Select the Contact in an Address Book or Distribution List and choose **Open** from the context menu,.

   The Contact window appears:




Note: Use the Contact search functionality in an Address Book or Distribution List to locate a Contact.

4. Select the **E-mails** tab to view the Mailing sent to the Contact and the status of the Mailings:
   - **Mailing**—the name of the Mailing the Contact received
   - **Last status update**—the date when the Contact statistics were last updated
   - **Status**—whether the e-mail was `Delivered`, `Read`, `Failed`, or `Action taken` (one or more links in the e-mail were clicked)



5. Select a Mailing and click **E-mail Details** to see what the actual e-mail of a Mailing looked like for this Contact. The personalized e-mail is displayed in a new window:

6. Click **Close** to close the window.

## 19.3.9 Creating a Local Address Book

A Local Address Book contains a collection of Contacts imported from an external data source and typically consists of a list of e-mail addresses used for a one-time marketing action. Local Address Books are temporary and are not designed to be used to manage Contacts.

### Requirements

To create a Local Address Book, you need Contact Management rights.

Note: Only Tridion System Administrators can edit or delete a Local Address Book.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. Select the **Address Books** node and click the **Create New Local Address Book** icon in the toolbar.

   A **New Address Book** window appears.
4. On the **General** tab, enter:
   - The **Name** of the group—enter a logical name
   - The **Key** of the group—uniquely defines the Address Book at a database level
5. Click **Save and Close** .

### Result

A Local Address Book is created and added to the **Address Books** node. All users with Contact Management rights have Read/Write/Delete permissions on Contacts in the Address Book.

### Next steps

When you have added a Local Address Book, you need to import Contacts into it. To delete the Local Address Book again, contact your Tridion System Administrator.

## 19.3.10 Importing Contacts and Keywords

To keep your list of Contacts up-to-date you can add or update Contacts, or add and update Keywords to Contacts, by importing data from a file. This file is usually an export of your own database of Contacts and must be in Comma Separated Value (.CSV) file format, or any other delimited file format that delimits the data using the supported formats.

### Creating the Contact import file

You can import Contacts contained in a delimited file format such as CSV file into an Address Book. This section describes the requirements for the import file used to import Contacts:

- The data in the file must be delimited using the supported formatting (see below)
- The file must be encoded using UTF-8, if it contains unicode characters
- The first row of data in the file must contain the names of the various data columns:
  - At least one column must contain an identifier to uniquely identify Contacts (see **Contact identification** below)
  - Other columns whose values you want to import must map to the extended detail fields being used
  - To import Contacts into the **(All Contacts)** node at System Administration level, the file must contain a column that you can map to the `GROUP_KEYVALUE` field (the row value must specify the **Key** value of an existing Address Book)
- Configure logging for import in the `OutboundEmail.xml` configuration file (see the *SDL Tridion Installation Manual*)

### Contact identification

Contacts have a default set of extended detail fields in which the combination `IDENTIFICATION_KEY` and `IMPORT_SOURCE` are used to uniquely identify individual Contacts. The procedure for changing and configuring contact identification fields and adding Contact Extended Details (executed by a Database Administrator) is described in the implementation documentation.

### Specifying default mapping

In the `<ContactDetails>` section of the configuration file `OutboundEmail.xml` you must specify extended detail fields for Contacts. These fields reflect the extended details as defined in Audience Manager databases. To provide default mapping, specify the same column names in the file as those specified for the extended detail fields. For more information about configuration, see the *SDL Tridion Installation Manual*.

In addition to the extended detail fields, Contacts also come with a fixed set of fields for each Contact which are assigned default values if not mapped. You can ensure that the mapping works by default by creating columns with the names in the following table:

| Field | Possible values | Default value |
|---|---|---|
| `SUBSCRIBE_STATUS_ID` | • 1 = Unsubscribed<br>• 2 = Subscribed<br>• 3 = Opted-In | 2 |
| `EMAIL_TYPE` | • 1 = Html<br>• 2 = Text<br>• 3 = Multipart | 1 |
| `BOUNCE_STATUS_ID` | • 1 = No problems<br>• 2 = Temporary problems<br>• 3 = Persistent problems | 1 |
| `ENABLED` | `true` or `false` | `true` |
| `GROUP_KEYVALUE` | The **Key** value of an existing Address Book | |

## File formatting

The following table describes how the data may be formatted in your Contact import files:

| Format option | Description | Supported Values |
|---|---|---|
| **Field separator** | Specifies how fields/columns are separated. | • `,` (comma)<br>• `;` (semicolon)<br>• `:` (colon)<br>• `(Tab)` (tab)<br>• `\|` (vertical bar) |
| **String delimiter** | Specifies how fields that contain commas, double-quotes, or line-breaks are delimited. | • `"` (double quotation marks)<br>• `'` (single quotation marks) |
| **Decimal separator** | Specifies the symbol used to mark the boundary between the integral and the fractional parts of a decimal numeral. | • `.` (decimal point)<br>• `,` (decimal comma) |
| **Group separator** | Specifies the symbol used, before or after the thousand separator (to ease the reading of large numbers). | • `'` (apostrophe)<br>• `,` (comma)<br>• `.` (period)<br>• `(Space)` (blank space) |
| **Date format** | Specifies the date format. | Dates must be formatted according to the data formats supported by your Audience Manager database:<br>• MS SQL—date formats supported by the .NET framework |

| Format option | Description | Supported Values |
|---|---|---|
| | | • Oracle—date formats supported by Oracle |
| **Row separator** | Specifies how rows are separated<br><br>Note: The import automatically detects the row separator used. | • carriage return<br>• line feed<br>• carriage return/line feed pair |

Note: The formatting used in the file needs to be communicated to all users who perform import as these details need to be specified when you import.

## Importing Contacts

You can import Contacts from a Comma Separated Value (CSV) file into an Address Book. The import file contains rows of data: each row of data defines a Contact and contains values for their Contact details and Contact extended details.

### Requirements

- To import Contacts into an Address Book in a Publication, you need Contact Management rights and Write permissions for the destination Address Book.
- To import Contacts into the **(All Contacts)** node in **System Administration**—or any other Address Book in **System Administration**—you need System Administrator rights.
- You need to know the formatting used in the CSV import file. For information, see Creating the Contact import file (see page 248).

### Context

When you import Contacts, you can specify how values are assigned or mapped as follows:

- if you want to apply the same value to the Contacts Detail field for all imported Contacts, select `[set to a fixed value]` and enter a value in the **Value** field
- if the field contains values you do not want to import, select `[skip this field]`
- if the values in the field correspond to those of the Contact Detail, map the import field to an existing Contact Detail

### Steps to execute

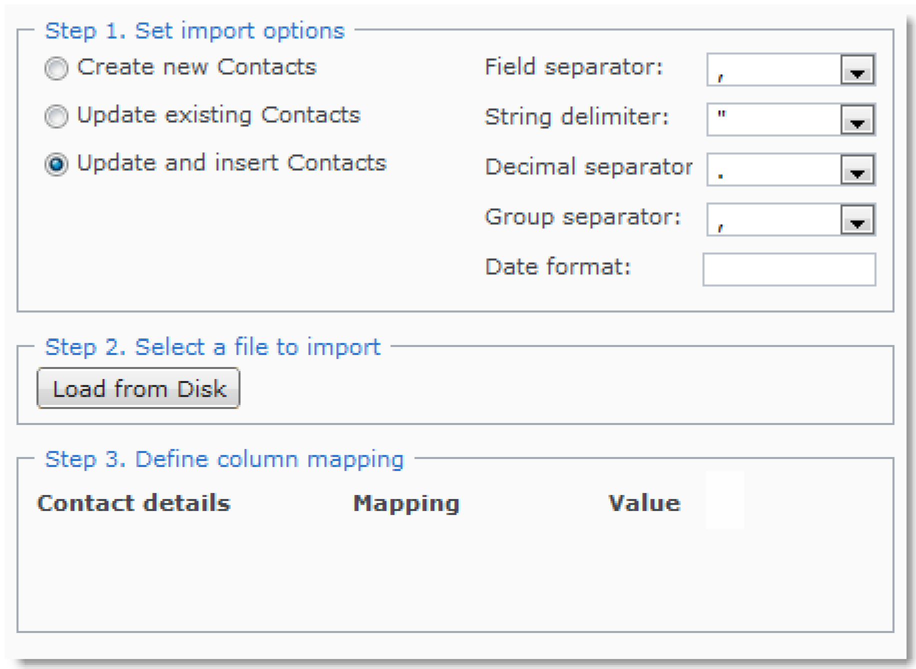
1. Open the Content Manager Explorer.
2. Do one of the following:
    - Navigate to the **Publication** > **Audience Manager** node.

- In **System Administration**, navigate to the **Audience Management** node.

3. Select an Address Book and do one of the following:

   - Click the **Import Contacts** icon in the toolbar.
   - Choose **Import Contacts** from the context menu.

   The **Import Contacts** screen opens in a new window.




4. In **Step 1. Set import options**:

   a. Select **Create new Contacts** if your import file contains Contacts that do not yet exist in Audience Manager, in which case records in the import file containing existing IDs are ignored.

   b. Select **Update existing Contacts** if the import file contains Contacts already in Audience Manager, in which case records in the import file containing new IDs are ignored.

   c. Select **Update and insert Contacts** to create new Contacts and update existing ones (the default).

   CSV is a delimited data format. As data can be formatted in several different ways, you need to specify the formatting used in your source import file:

   a. **Field separator**—specifies how fields/columns are separated.

   b. **String delimiter**—specifies how fields that contain commas, double-quotes, or line-breaks are delimited.

c. **Decimal separator**—specifies the symbol used to mark the boundary between the integral and the fractional parts of a decimal numeral.

d. **Group separator**—specifies the symbol used to ease the reading of large numbers (normally, the thousand separator).

e. **Date format**—specifies the date format.

Note: For more information on CSV file formatting, see Creating the Contact import file (see page 248).

5. In **Step 2. Select a file to import**:

   a. Click the **Load from disk** button.

   b. In the **File Upload** dialog, navigate to the drive and folder that contains the file you want to import into the Address Book, then select the file and click **Open**.

   c. Click **OK** to confirm the selection.

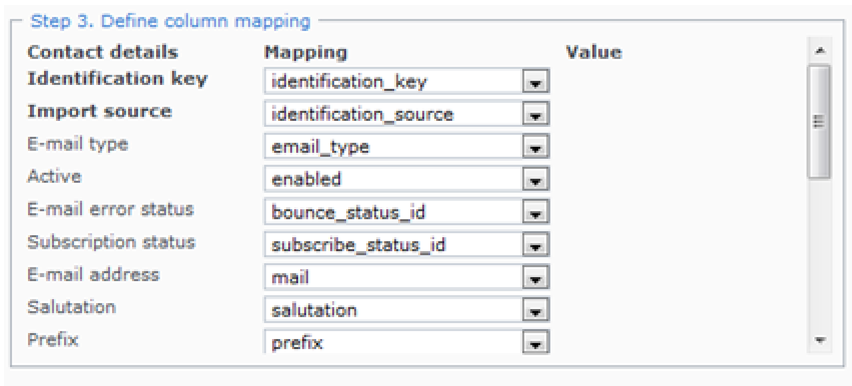
Important:The import loads the first row of the import file defining the column names using the default formatting options. If you change the data formatting options, click the **Redo mapping** button to reload the file.

6. When you change the data formatting options, click the **Redo mapping** button to reload the file using these options.

7. In **Step 3 Define column mapping**, for each **Contact Detail**, you have the following options in the **Mapping** field (note that mandatory fields are marked by an asterisk):

   - select a field from the drop-down list to map a column in the import file to a Contact Detail
   - select `[set to a fixed value]` and enter a value in the **Value** field to apply this value to the Contacts Detail for all imported Contacts
   - select `[skip this field]` to not import a field for this Contact Detail
   - fields marked in bold indicate the field, or fields, used to uniquely identify Contacts:
     - If one field is marked in bold, the value assigned in the import file for each Contact must be unique
     - If more than one field is marked as bold, the combined value of the fields must be unique.

For example, Contacts come with a default set of extended detail fields. The fields `IDENTIFICATION_KEY` and `IMPORT_SOURCE` are used to uniquely identify Contacts.
In this default situation, you could therefore map the `IDENTIFICATION_KEY` to a column in the CSV file, and set `IMPORT_SOURCE` to a fixed value such as `TRIDION` to identify where the Contacts come from.




- For System Administrators only, when you import Contacts into the **(All Contacts)** Address Book, you need to specify a value for the `GROUP_KEYVALUE` field in one of the following ways:
  - map the `GROUP_KEYVALUE` to a column in the import CSV file: the values for each column row must be a **Key** value of an existing Address Book
  - map the `GROUP_KEYVALUE` to a `[set to a fixed value]` map: the **Value** must be a Key value of an existing Address Book.

8. Click the **Preview** button. A preview of the data that will be imported is displayed for the first ten Contacts (existing data is not displayed).

9. Click the **Import** button.

10. When the import is complete, a status message is displayed at the bottom of the **Import Contacts** screen:
    - Click the log file link to view the import log files.
    - Click **Close** to exit the import dialog.

## Result

Contacts are created and/or updated in the specified Address Books. Each row in the import file is evaluated and resolved individually.

- If you selected to update existing Contacts:
  - in the **(All Contacts)** node, the Contacts will be updated if the Address Book specified in the CSV file exists and the specified Contact exists and resides in this Address Book.
  - in a selected Address Book, the Contacts will be updated if they reside in this Address Book.
- If you selected to create new Contacts:
  - in the **(All Contacts)** node, the Contacts will be created in the specified Address Book.

- in a selected Address Book, Contacts will be created in this Address Book.
- the Contact is not created if the Contact identification is not unique

## Creating the Keyword import file

You can import Keywords contained in a delimited file format, such as a CSV file, and add these Keywords to Contacts (note the import does not create Contacts or Categories). This section describes the requirements for the import file used to import Keywords:

- The data in the file must be delimited using the supported formatting
- The file must be encoded using UTF-8, if it contains unicode characters
- The first row of data in the file must contain the names of the various data columns:
  - At least one column must contain an identifier to uniquely identify Contacts (see **Contact identification** below)
  - A Keyword column the values of which may or may not map to an existing Keyword, depending on whether you want to create new Keywords or just add them to Contacts
  - Optionally, a Category column the values of which map to an existing Category
  - Optionally, a Publication column the values of which map to an existing Publication
- Configure logging for import in the `OutboundEmail.xml` configuration file (see the *SDL Tridion Installation Manual*)

### Contact identification

Contacts come with a default set of extended detail fields in which the combination `IDENTIFICATION_KEY` and `IMPORT_SOURCE` are used to uniquely identify individual Contacts. The procedure for changing and configuring contact identification fields and adding Contact Extended Details (executed by a Database Administrator) is described in the implementation documentation.

### File formatting

The following table describes how the data may be formatted in your Keyword import files:

Note: The formatting used in the file needs to be communicated to all users who perform import as these details need to be specified when you import.

| Format option | Description | Supported Values |
|---|---|---|
| **Field separator** | Specifies how fields/columns are separated. | • , (comma)<br>• ; (semicolon)<br>• : (colon)<br>• `(Tab)` (tab)<br>• \| (vertical bar) |

| Format option | Description | Supported Values |
|---|---|---|
| **String delimiter** | Specifies how fields that contain commas, double-quotes, or line-breaks are delimited. | • " (double quotation marks)<br>• ' (single quotation marks) |
| **Row separator** | Specifies how rows are separated<br><br>Note: The import automatically detects the row separator used. | • carriage return<br>• line feed<br>• carriage return/line feed pair |

## Importing Keywords

Keywords are properties of a Contact defining Contact's preferences and interests. A Contact may have multiple Keywords from one or more Categories. You can import Keywords contained in a file and add them to Contacts.

### Requirements

To import Keywords into Contacts you need:

- Contact Management rights and Write permissions for the Address Book.
- Category Management rights and Write permissions for the destination Category (if creating Keywords).
- To import Keywords into Contacts contained in the **(All Contacts)** node, or in any Address Book in **System Administration**, you need System Administrator rights.
- You need to know the formatting used in the import file. For more information, see Creating the Keyword import file (see page 254).

### Context

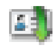
The import allows you to do specify one of the following scenarios:

- Add new Keywords to a Category and add these Keywords to a Contact
- Add new Keywords to a Category and add these Keywords to a Contact, overwriting the Contact's current Keywords
- Add existing Keywords to a Contact
- Add existing Keywords to a Contact, overwriting the Contact's current Keywords

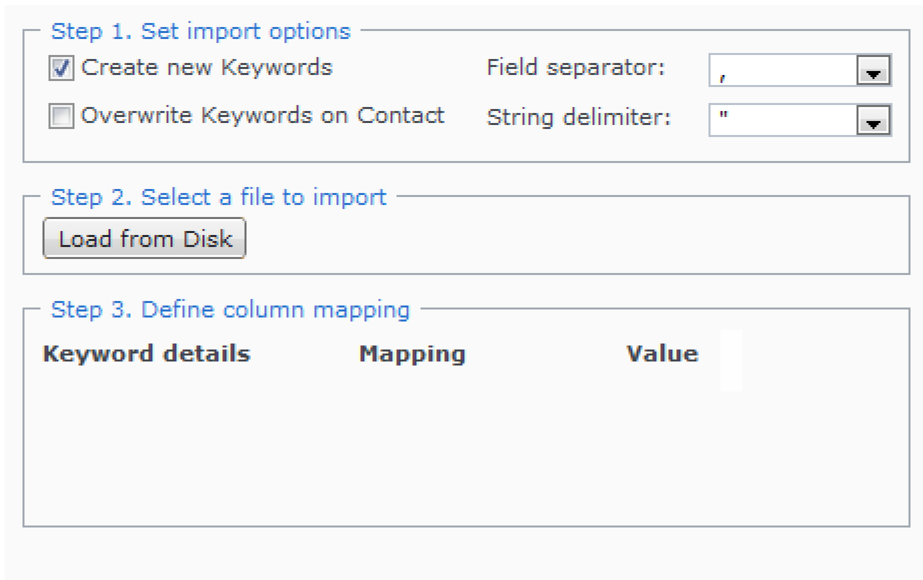
The import file contains rows of data: each row of data defines a Keyword and specifies a Contact to assign the Keyword to. Optionally, the import file may contain values for the Publication and Category in which you want to import the Keyword. In this case, you can map these columns, otherwise you can select available the Publication and Category (a fixed value).

Note: The import does not create Contacts or Categories.

## Steps to execute

1. Open the Content Manager Explorer.
2. Do one of the following:
   - Navigate to the **Publication** > **Audience Manager** > **Address Books** node.
   - In the **System Administration** view, navigate to the **Audience Management** node.
3. Select an Address Book (note that you cannot import Keywords into the **(All Contacts)** node) and do one of the following:
   - Click the **Import Keywords** icon  in the toolbar.
   - Choose **Import Keywords** from the context menu.

   The **Import Keywords** screen opens in a new window.




4. In **Step 1. Set import options**:
   a. Select **Create new Keywords** if your import file contains Keywords that do not yet exist in the Content Manager.
   b. Select **Overwrite Keywords on Contacts** if you want the import to remove existing Contact's Keywords before adding Keywords.
   c. Specify the **Field separator** used in the import file (how fields/columns are separated).
   d. Specify the **String delimiter** used in the import file (how fields that contain commas, double-quotes, or line-breaks are delimited.)

Note: As data can be delimited in several different ways, you need to specify the formatting used in your source import file. For more information on file formatting, see Creating the Keyword import file (see page 254).

5. In **Step 2. Select a file to import**:

    a. Click the **Load from disk** button.

    b. In the **File Upload** dialog, navigate to the drive and folder that contains the file you want to import, then select the file and click **Open**.

    c. Click **OK** to confirm the selection.

Important:The import loads the first row of the import file defining the column names using the default formatting options. If you change the data formatting options, click the **Redo mapping** button to reload the file.

6. When you change the data formatting options, click the **Redo mapping** button to reload the file using these options.

7. In **Step 3. Define column mapping**:

    a. Fields marked in **bold** indicate the field, or fields, used to uniquely identify Contacts:

        - If one field is marked in bold, the value assigned in the import file for each Contact must be unique
        - If more than one field is marked as bold, the combined value of the fields must be unique.

        For example, Contacts comes with a default set of extended detail fields. The fields `IDENTIFICATION_KEY` and `IMPORT_SOURCE` are used to uniquely identify Contacts. In this default situation, you could therefore map the `IDENTIFICATION_KEY` to a column in the file, and set `IMPORT_SOURCE` to a fixed value such as `TRIDION` to identify where the Contacts come from.

    b. **Publication title**—do one of the following:

        - to map all rows in the file to one Publication, set **Mapping** to `[set to a fixed value]` and choose a Publication from the drop-down list
        - to map each row in the file to different Publications, in the **Mapping** drop-down list select the column in the file which maps to existing Publication titles in the Content Manager

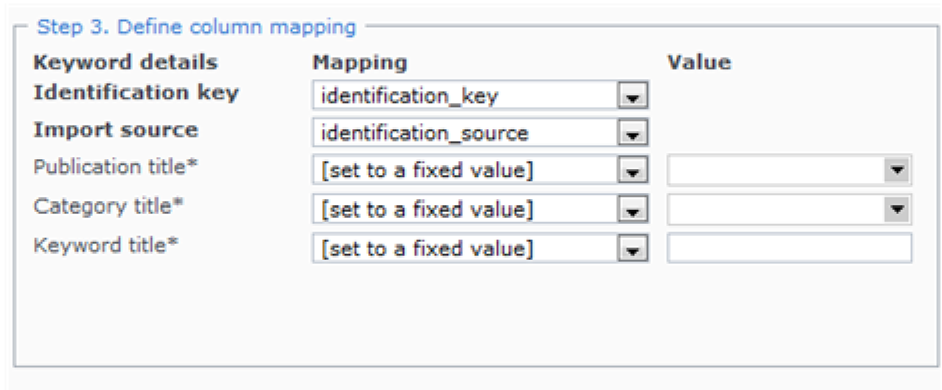
    c. **Category title**—do one of the following:

        - to map all rows in the file to one Category, set **Mapping** to `[set to a fixed value]` and choose a Category from the drop-down list

- to map each row in the file to different Categories, in the **Mapping** drop-down list select the column in the file which maps to existing Category titles in the Content Manager

d. **Keyword title**—do one of the following:

- in the **Mapping** drop-down list, map the column in the file which contains values for Keywords




Note: Fields marked in **bold** indicate the field, or fields, used to uniquely identify Contacts, and mandatory fields are indicated by an asterisk.

8. Click the **Preview** button. A preview of the data that will be imported is displayed for the first ten affected Contacts (existing data is not displayed).

9. Click the **Import** button.

10. When the import is complete, a status message is displayed at the bottom of the **Import Keywords** screen:

    - Click the log file link to view the import log files.
    - Click **Close** to exit the import dialog.

## Result

Depending on the options selected, Keywords are added to Categories in the specified Publication and/or to Contacts. Each row in the import file is evaluated and resolved individually.

Keywords are not imported in the following circumstances:

- if you did not select the option **Create new Keywords**
- if a row in the import file does not specify a Keyword (the field is empty)
- If you have mapped a column in the import file to a Publication and the Publication does not exist, or you do not have access permissions for the Publication
- If you have mapped a column in the import file to a Category and the Category does not exist, or you do not have Category Management rights and write permissions for the Category

Keywords are not added to Contacts in the following circumstances:

- if the import file specifies Contacts that do not exist, or are not in the selected Address Book
- if you did not select the option **Create new Keywords** and the Keyword does not exist
- if the Contact already contains the Keyword

Adding or removing Keywords to or from Contacts can add or remove the Contact from Dynamic Distribution Lists whose definition is based on Keywords.

## 19.3.11 Exporting Contacts and Keywords

When visitors of your Web site register themselves or change their Contact details, these details are stored in the Audience Manager database. If your organization has its own separate database of Contacts, you can update that database by exporting Contacts to a Comma Separated Value (CSV) file.

### Exporting Contacts

You can export Contacts from the Content Management system into a Comma Separated Value (CSV) file.

#### Requirements

- To export Contacts from an Address Book in a Publication, you need Contact Management rights and Read permissions for the selected Address Book.
- To export Contacts from the **(All Contacts)** node, or in any Address Book in **System Administration**, you need System Administrator rights.
- To export Contacts from a Distribution List, you need Distribution List Management rights and Read permissions for the Outbound E-mail Folder.

#### Context

The data in the exported Contacts file is formatted as follows:

- a comma is used as field delimiter
- double quote is used as text qualifier
- carriage return line-feed (CrLf) is used as a row separator
- the file is encoded in UTF-8.

You can export Contacts from any Address Book or Distribution List in the system. The export can contain all Contacts in the Address Book or Distribution List, or you can filter the list first before exporting.

A Tridion System Administrator can perform an export of all Contacts in the system from the **(All Contacts)** node in **System Administration**.

#### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.

3. To export Contacts to a .CSV file, do one of the following:

    a. To export **all members** of a specific Distribution List or Address Book, select the Distribution List or Address Book and either select **Export Contacts** from the context menu or click the **Export Contacts** icon in the toolbar.

    b. To export **a filtered selection of members** of a specific Distribution List or Address Book, perform a Contacts search and click the **Export Contacts** button. For more information, see Searching Contacts (see page 241).

    c. To export **a selection of members** of a specific Distribution List or Address Book, then multi-select Contacts you want to export and either select **Export Contacts** from the context menu or click the **Export Contacts** icon in the toolbar.

4. In the **File Download** dialog, click **Save**.

5. In the standard Windows **Save File** dialog that appears, select a location on your file system, enter a name for the file and click **Save**.

### Result

The export file is saved to the location on your file system specified.

Columns and rows of data are created in the export file. The columns have the same names as the corresponding Contact Details (user-defined) and the following hardcoded columns:

- `SUBSCRIBE_STATUS_ID`
- `EMAIL_TYPE`
- `BOUNCE_STATUS_ID`
- `ENABLED`
- `GROUP_KEYVALUE`

Each row in the export file stores data for a Contact.

## Exporting Keywords

You can export Keywords contained in Contacts from the Content Management system into a Comma Separated Value (CSV) file.

### Requirements

- To export Keywords from Contacts in an Address Book in a Publication, you need Contact Management rights and Read permissions for the selected Address Book.
- To export Keywords from the **(All Contacts)** node, or in any Address Book in **System Administration**, you need System Administrator rights.
- To export Keywords from Contacts in a Distribution List, you need Distribution List Management rights and Read permissions for the Outbound E-mail Folder.

## Context

The data in the exported Keywords file is formatted as follows:

- a comma is used as field delimiter
- double quote is used as text qualifier
- carriage return line-feed (CrLf) is used as a row separator
- the file is encoded in UTF-8.

You can export Keywords contained in Contacts from any Address Book or Distribution List in the system. The export can contain all Keywords in all Contacts in an Address Book or Distribution List, or you can filter the Contact list first before exporting.

A Tridion System Administrator can perform an export of all Keywords used in Contacts in the system from the **(All Contacts)** node in **System Administration**.

## Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. To export Keywords used in Contacts to a .CSV file, do one of the following:
    - To export Keywords in **all Contacts** of a specific Distribution List or Address Book, select the Distribution List or Address Book and either select **Export Keywords** from the context menu or click the **Export Keywords** icon in the toolbar.
    - To export Keywords in **a filtered selection of members** of a specific Distribution List or Address Book, perform a Contacts search and click the **Export Keywords** icon. For more information, see Searching Contacts (see page 241).
4. In the **File Download** dialog, click **Save**.
5. In the standard Windows **Save File** dialog that appears, select a location on your file system, enter a name for the file and click **Save**.

## Result

The export file is saved to the location on your file system specified.

Columns and rows of data are created in the export file. The following columns are created:

- `KEYWORD`
- `CATEGORY`
- `PUBLICATION`
- Contact Identification fields

Each Keyword for a selected Contact is stored in a separate row.

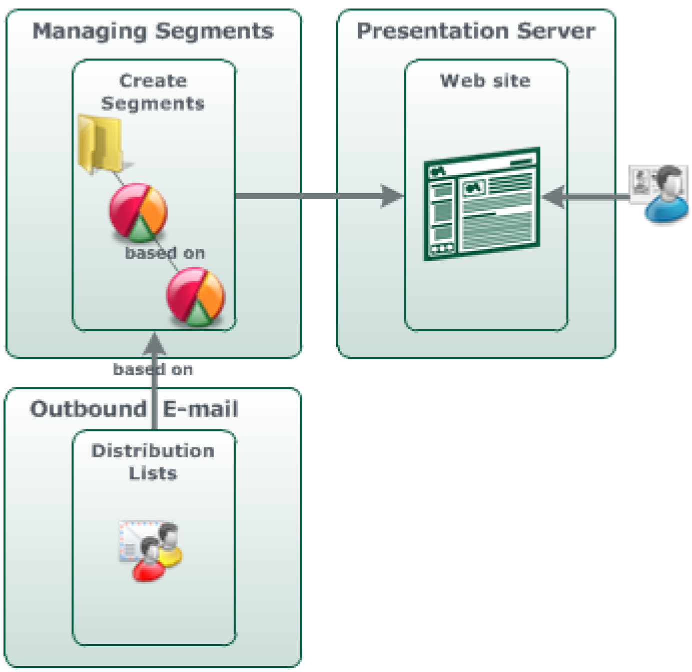
Note: If the Contact identification field names already contains "PUBLICATION", "CATEGORY", and/or "KEYWORD", the field containing the publication/category/keyword name is made unique by adding a number. For example, field name "CATEGORY1".

## 19.4 Managing Segments

A Segment defines Contact preferences, interests and characteristics that represent a target audience of known Contacts accessing content on your Web sites. You can base a Segment on another Segment so that you can create generic Segments and progressively more specific Segments to create a chain of filters whereby each filter in the chain further refines the selection.

You can use Segments as follows:

- In Outbound E-mail, you can create a Dynamic Distribution List based on a Segment.
- In Audience Manager, on the presentation server implementers can get the list of available Segments through the Outbound E-mail Content Delivery APIs.




You define a Segment using filters. These filters are the same as those used to define Dynamic Address Books and Dynamic Distribution Lists. Whereas Address Books and Distribution Lists are used to manage groups of known Contacts and therefore contain a list of Contacts that match the filter, Segments define content audiences and therefore do not contain Contacts.

Note: You organize Segments into Folders. For more information, refer to Creating Folders for Mailings, Distribution Lists and Segments (see page 280).

## 19.4.1 Creating or updating Segments

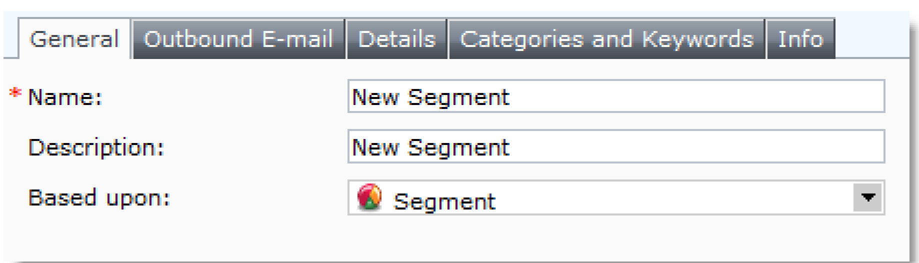
You create Segments by defining filters. You can use Outbound E-mail fields, Contact details, and Keywords as filters. You create Segments in Folders in the Audience Manager node.

### Requirements

To create or update a Segment, you need Segmentation Management rights and Write permissions for the parent Folder.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. Select a Folder and click the **New Segment** icon in the toolbar, or to modify a Segment, select the Segment and choose **Open** from the context menu.
4. In the **General** tab:
   - Enter a **Name** and **Description**.
   - In the **Based on** drop-down list you can select a Segment to base your Segment on, in which case filters defined in the parent Segment are included with the filters defined in the child Segment:




Note: Segments based on other Segments allow you create generic Segments and progressively more specific Segments. For information on how you create a chain of filters to narrow down an audience you are targeting, refer to Contact filtering (see page 232).

5. In the **Outbound E-mail** tab, enter:
   - **E-mail address**—fill in all or part (the first characters) of an e-mail address.
   - **E-mail type**—specify the Contact’s preferred e-mail format. Select either **HTML**, **Text**, or **Multi-part**.
   - **Subscription status**—indicates the status of a Contact's subscription:
     - **Opted-in**—the Contact registered as a subscriber and confirmed the registration.

    - **Subscribed**—the Contact registered as a subscriber, but did not yet confirm the registration.
    - **Unsubscribed**—the Contact would not like to receive e-mail.
  - **E-mail error status**—indicates whether problems have been encountered sending e-mails to the Contact:
    - **No problems**—e-mails sent to this Contact should arrive without incident.
    - **Temporary problems**—e-mails sent to this Contact have encountered temporary problems, for example, the Contact's e-mail Inbox was full.
    - **Persistent problems**—e-mails sent to this Contact have encountered permanent problems, for example the e-mail address of the Contact does not exist.
  - **Active**—`Yes` or `No` indicating Contacts who can or cannot receive e-mails.

6. In the **Details** tab, you can specify Contact extended details to filter on filter operators.

   Note: Extended details are configurable and implementation specific.

7. In the **Categories and Keywords** tab, you can specify Keyword criteria to filter Contacts on their assigned Keywords:

   a. Click **Add**.

   b. Browse to and select a Keyword.

   c. Click **Insert**.

   d. Repeat the procedure to add more Keywords.

   e. Click **Close** when you have finished adding Keywords.

   f. To remove a Keyword, select it click the **Remove** button.

   Note: The list of **Keywords** displayed does not reflect Keyword hierarchy (the Keywords are displayed in a flat list). You can use multiple Keywords, from several Categories and in different Publications. A Contact can also have multiple Keywords from the same Category, for example, if a Contact is both a Business Contact and a Consumer Contact, both Keywords apply.

   Note: If a Category and Keyword in the list are both marked `***DELETED***`, the Keyword has been deleted.

8. Click **Save and Close** .

### Result

You have created a Segment based on the specified filter criteria.

## 19.4.2 Creating a Segment from search

A Contacts search allows you to define search criteria to filter a list of Contacts. When you perform a search on the **(All Contacts)** node, you can save the filter (used to filter these Contacts) as a Segment.

### Requirements

To create or update a Segment, you need Segmentation Management rights and Write permissions for the parent Folder.

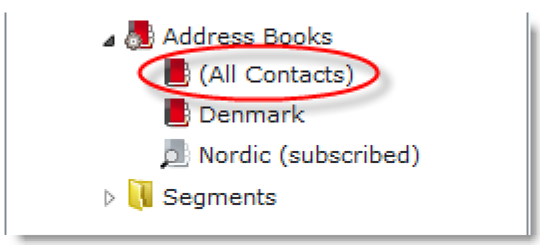
You can only create a Segment from search from the **(All Contacts)** node in a Publication (not within System Administration).

### Context

Note: The **(All Contacts)** node contains all Contacts in a Publication.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** > **Address Books** node.
3. Select the **(All Contacts)** node:

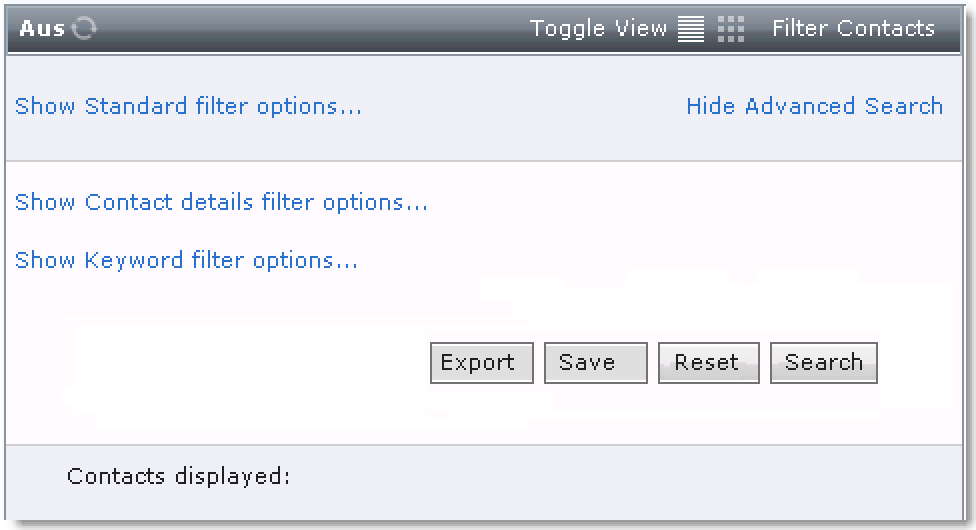



4. In the Search window:

   a. Define search criteria—for more information, see Searching Contacts (see page 241).

   b. Click the **Search** button. The list view shows Contacts filtered according to the search criteria.

   c. Click the **Save** button.




Note: The search window shows Standard, Details and Keyword filter options and the list view the Contacts within the Address Book or Distribution List.

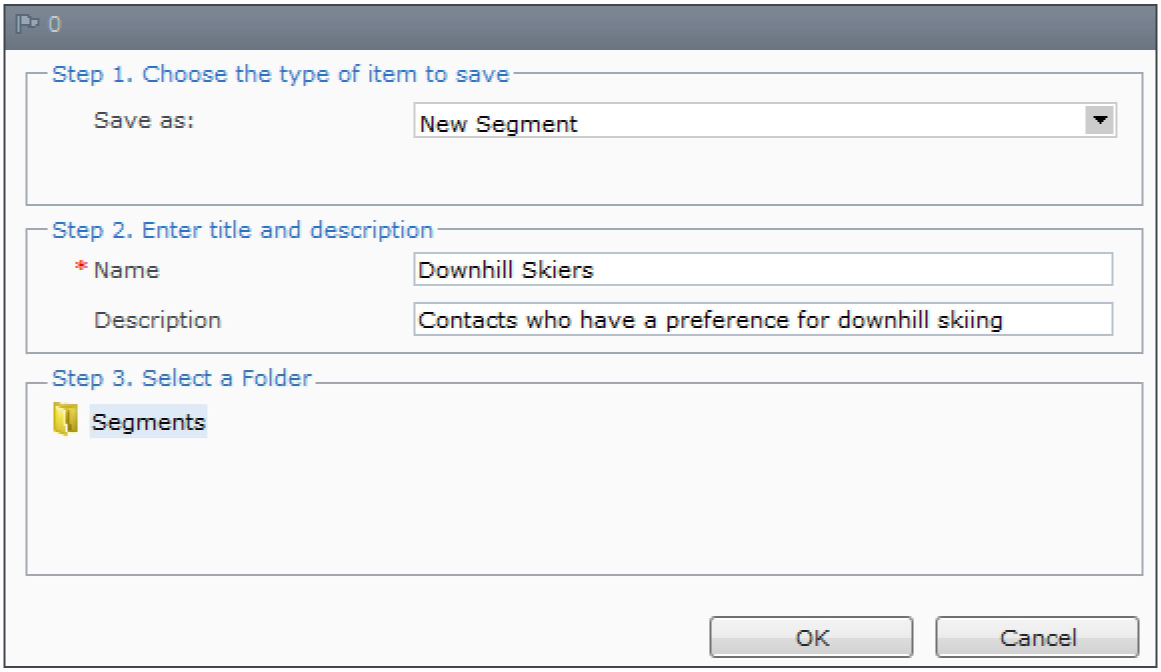
A dialog appears in which you can add the Contacts in the filtered list to an existing Static Distribution List, or create a new a Dynamic Distribution List or Static Distribution List.

5. Create a Segment as follows:

   a. In **Step 1**, **Choose the type of item to save** by selecting `New Segment` from the drop-down menu.

   b. In **Step 2**, **Enter title and description**.

   c. In **Step 3**, **Select a Folder** where you want to save the Segment then click **OK** to save the Segment.




### Result

The Segment is created in the specified Folder.

## 19.4.3 Copying or moving Segments

You can only make copies or move Segments within Folders of the Audience Manager node. You can paste multiple items at once, and copying a Folder copies all of the Segments within it and any of its subfolders.

### Requirements

- To cut and paste a Segment, you need Segmentation Management rights and Delete permissions for the parent Folder and Write permissions on the destination Folder (the paste location).
- To copy and paste a Segment, you need Segmentation Management rights and Read permissions for the parent Folder and Write permissions on the destination Folder (the paste location).

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. Select one or more Segments in a Folder and choose **Cut** or **Copy** from the context menu.
4. Select a Folder in the **Audience Manager** node and choose **Paste** from the context menu.

### 19.4.4 Editing Segments in Child Publications

Although Segments are BluePrinted, you cannot localize Segments in Child Publications.

#### Context

When you create Segments in a Parent Publication the Segment is shared to all Child Publications in the BluePrint hierarchy following standard SDL Tridion functionality. You cannot, however, localize Segments in Child Publications; you cannot create a “local copy”. When you open a Segment in a Child Publication you are prompted to make the following choice:

- Edit the parent item.
- Open the shared item in read only mode.

### 19.4.5 Deleting Segments

You can delete a Segment, provided you have Segmentation Management rights and Delete permissions for the parent Folder.

#### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Audience Manager** node.
3. Select one or more Segments in a Folder and choose **Delete** or **Copy** from the context menu.

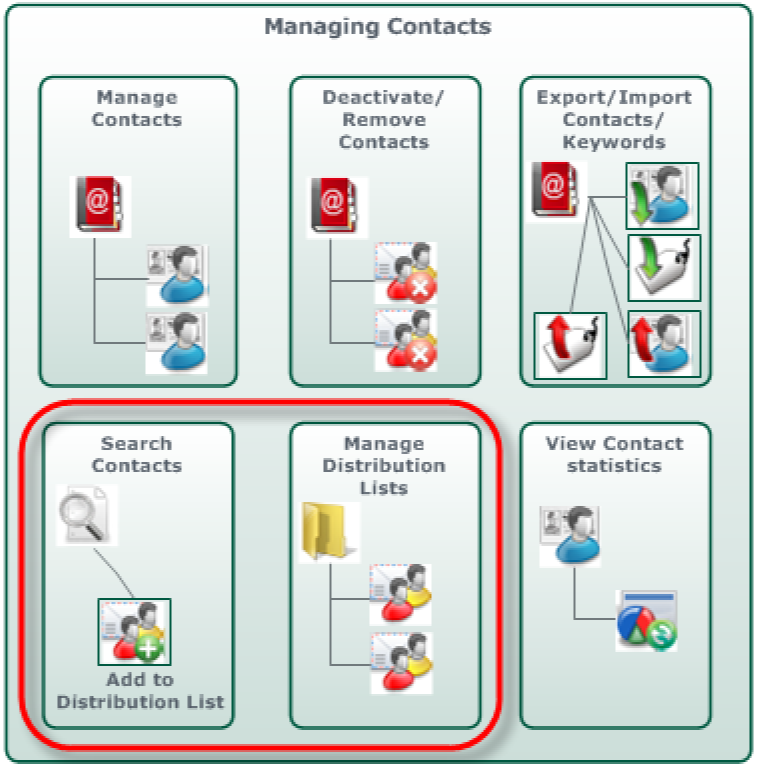
## 19.5 Managing Distribution Lists

A Distribution List is a list of Contacts that define the recipients of a Mailing. When you create a Mailing, you need to specify Distribution Lists and Address Books; to receive a Mailing, a Contact must be in a selected Distribution List *and* Address Book.

Managing Distribution Lists describes how to perform the following tasks:

- **Create Static Distribution Lists**—contains a fixed list of Contacts to send a mail to.
- **Create Dynamic Distribution Lists**—contains a dynamic list of Contacts to send a mail to. The list changes dynamically when you modify the filters that define the Distribution List or when a Contact's characteristics, interests or preferences change.

Note: You can explore the response to a Mailing and turn a selection of Contacts into a Distribution List. For more information, see Viewing Distribution List statistics (see page 315).




## 19.5.1 Distribution Lists

A Distribution List contains a list of Contacts that define the recipients of a Mailing. You can create Static or Dynamic Distribution Lists.

**Static Distribution List**

A Static Distribution List contains a fixed list of Contacts to send a mail to. A Static Distribution List only changes if you explicitly add or remove Contacts. You can add Contacts to Static Distribution Lists manually, or from the results of a Contacts search.

The advantage of a Static Distribution List is that it has a high level of detail containing very specific Contacts. The disadvantages are that the amount of effort needed to create the list tends to be greater (than Dynamic Distribution Lists) as you have to manually add Contacts to the list, and the maintenance effort needed to keep the list up-to-date is high is as changes are not automated.

Static Distribution Lists are recommended for small lists that rarely change.

**Dynamic Distribution List**

A Dynamic Distribution List contains a dynamic list of Contacts to send a mail to. The Contacts in a Dynamic Distribution List are derived from the Contacts in an Address Book that meet the criteria defined by the Dynamic Distribution List filter. The Contacts included in the list therefore change dynamically as and when you modify the filters or a Contact’s details or Keywords change.

You can base a Dynamic Distribution List on a Segment, Address Book or Dynamic Address Book (and on Dynamic Distribution Lists through search) to create a chain of filters in which case each filter in the chain further refines the selection. For more information, refer to Contact filtering (see page 232).

A Dynamic Distribution List has the advantage that the development effort needed to create the list is relatively low and the maintenance effort needed to keep it up-to-date is minimal as changes to the Distribution List are automatic (although you may want to change the filtering criteria). However, the level of detail is low because the selection method is coarse (contains general Contacts).

For example, you can create a Dynamic Distribution List based on the Keyword filter “Potential Customers”, in which case all Contacts tagged with this Keyword are added to the list. If a Contact’s Keyword changes from “Potential Customers” to “Customer” they are automatically removed from the list.

## 19.5.2 Creating or modifying a Distribution List from search

A Contacts search allows you to define search criteria to filter Contacts in an Address Book or Distribution List. The result of a search is a filtered list of Contacts who meet specified criteria. You can add the Contacts in the filtered list to an existing Static Distribution List, or create a new a Dynamic Distribution List or Static Distribution List.

### Requirements

To create a Distribution List, you need:

- Distribution List Management rights and Write permissions for the destination Outbound E-mail Folder
- Category Management rights and Read permissions—needed to define filters based on Categories and Keywords

### Context

Note: For information on how you create a chain of filters to narrow down an audience you are targeting, refer to Contact filtering (see page 232).

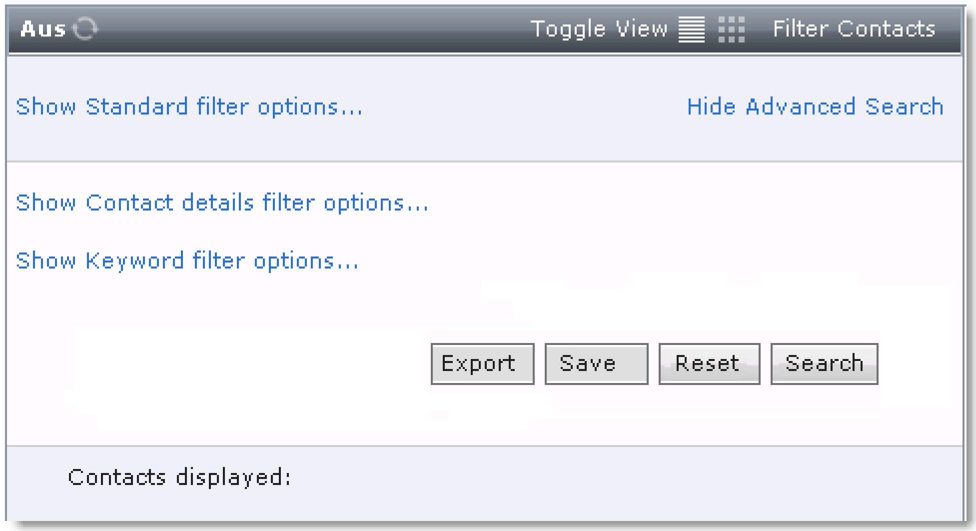
### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to a Publication and do one of the following:
   - In the **Audience Manager** node, select an Address Book.
   - In the **Outbound E-mail** node, select a Static or Dynamic Distribution List in a Folder.
3. In the Search window:

a. Define search criteria—for more information, see Searching Contacts (see page 241).

b. Click the **Search** button. The list view shows Contacts filtered according to the search criteria.

c. Click the **Save** button.



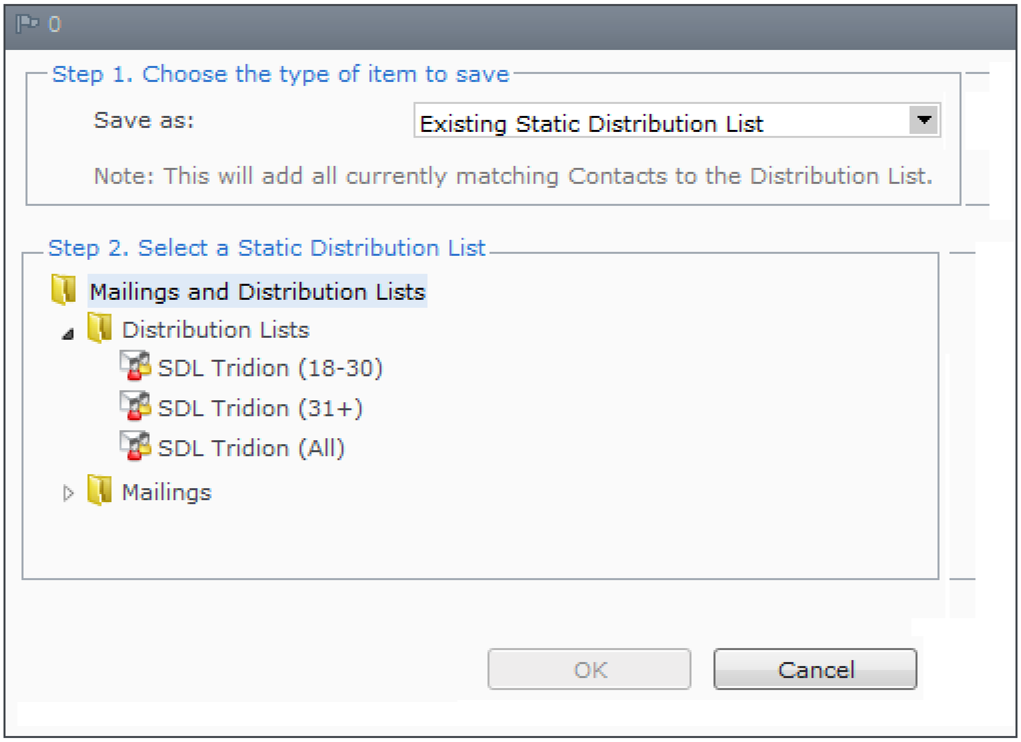

Note: The search window shows Standard, Details and Keyword filter options and the list view the Contacts within the Address Book or Distribution List.

A dialog appears in which you can add the Contacts in the filtered list to an existing Static Distribution List, or create a new a Dynamic Distribution List or Static Distribution List.

4. Update a Static Distribution List as follows:

   a. In **Step 1**, **Choose the type of item to save** by selecting `Existing Static Distribution List` from the drop-down menu.

   b. In **Step 2**, **Select a Static Distribution List** then click **OK** to update the Distribution List.



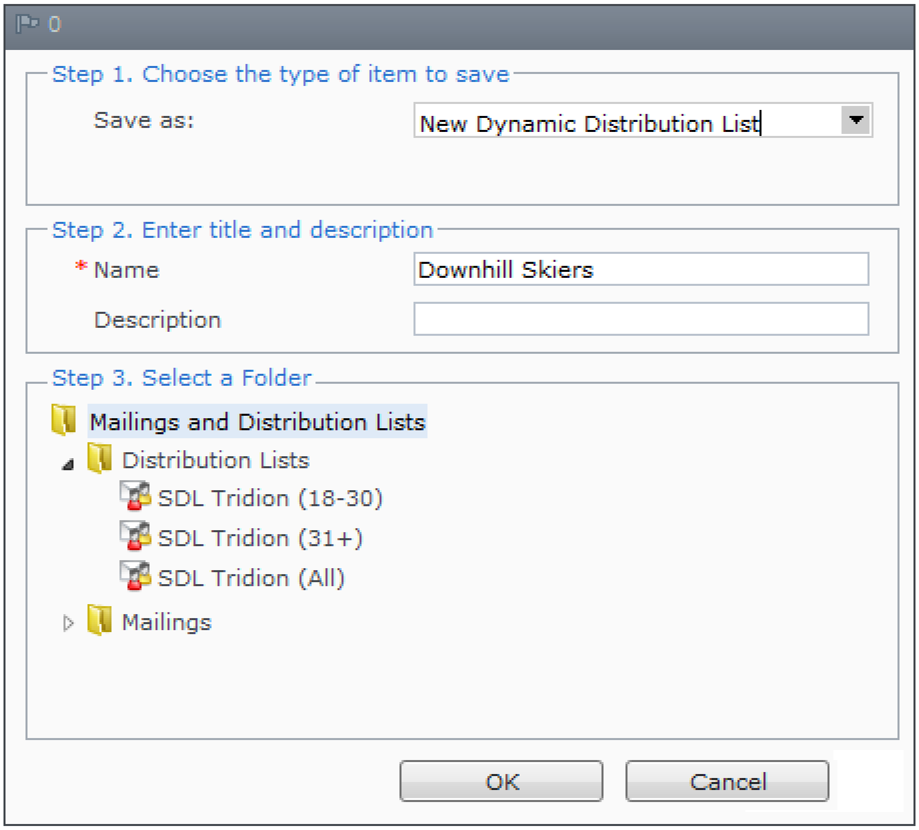

5. Create a Distribution List as follows:

   a. In **Step 1**, **Choose the type of item to save** by selecting one of the following from the drop-down menu:

      - `New Static Distribution List`
      - `New Dynamic Distribution List`

   b. In **Step 2**, **Enter title and description**.

   c. In **Step 3**, **Select a Folder** where you want to save the Distribution List then click **OK** to save the Distribution List.




### Result

- Outbound E-mail creates or updates a Static Distribution List and adds the Contacts in the Search results to the list.
- Outbound E-mail creates a Dynamic Distribution List. The list contains Contacts in a Static Distribution List or Address Book which meet the specified criteria. The list of Contacts is updated automatically to match the filter, for example when:
  - A Contact is added to the Address Book or Static Distribution List whose personal details, mailing details, or Keywords meet the search criteria.
  - A Contact's extended details, mailing details, or Keyword in the Address Book or Static Distribution List are modified so that these no longer meet the search criteria.
  - You change the definition of the Dynamic Distribution List by modifying the filters.

Note: By default, a new Distribution List is assigned a priority value of 1 (when a Mailing is sent, e-mails are sent to Contacts in order of Distribution List priority—the higher the value, the higher the priority).

## 19.5.3 Adding Contacts to a Static Distribution List

You can add Contacts to a Static Distribution List from any Address Book, Static or Dynamic Distribution List.

## Requirements

To update a Distribution List, you need Distribution List Management rights and Read and Write permissions for the destination Outbound E-mail Folder.

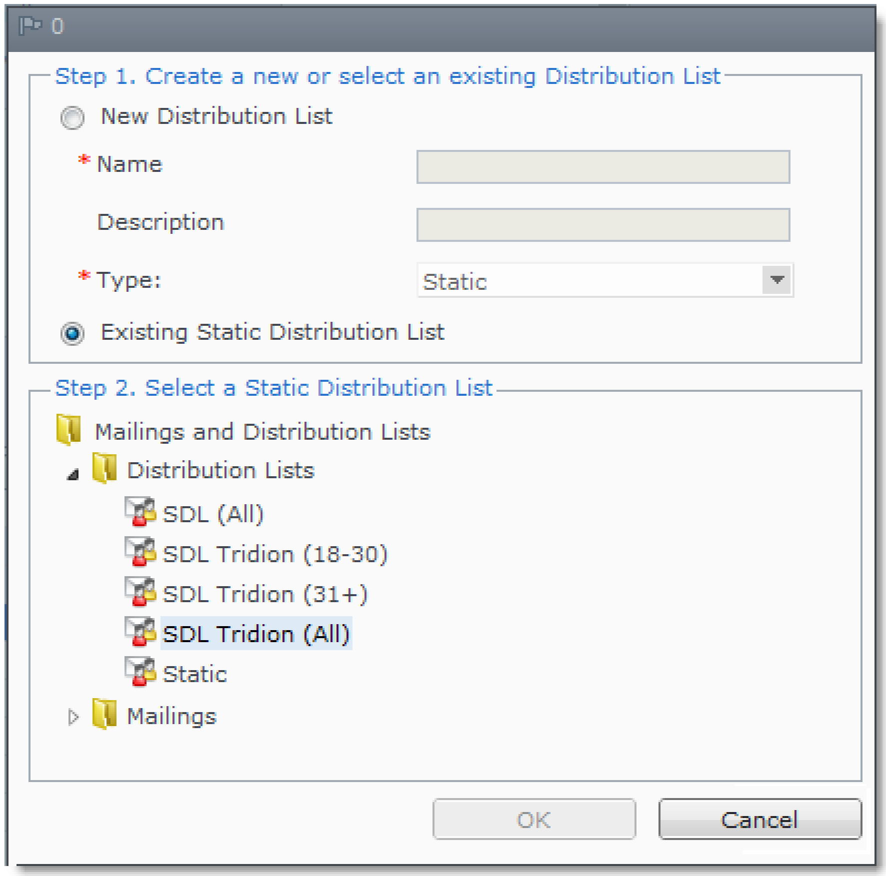
To add Contacts to a Distribution List from an Address Book, you need Read permissions for the Address book.

## Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Outbound E-mail** node and do one of the following:
   - In the **Audience Manager** node, select an Address Book.
   - In the **Outbound E-mail** node, in a Folder select a Static or Dynamic Distribution List.
3. In the list view, select one or more Contacts and choose **Add Contacts to Distribution List** from the context menu.

   Note: To select several Contacts from the list, use the Shift key to select sequential Contacts and the Ctrl key to select non-sequential Contacts.

4. In the **Add Contacts** window:
   - Select **New Distribution List** and enter a **Name** and **Description** (**Type** is set automatically to `Static`). Select a Folder where you want to save the Distribution List and click **OK** to save the Distribution List.
   - Select **Existing Static Distribution List**. Select a Static Distribution List in a Folder and click **OK** to save the Distribution List.




### Result

Outbound E-mail adds the selected Contact, or Contacts, to the Static Distribution List.

## 19.5.4 Removing Contacts from a Static Distribution List

You can remove Contacts from a Static Distribution List manually.

### Requirements

To remove Contacts from a Distribution List, you need Distribution List Management rights and Write permissions for the destination Outbound E-mail Folder.

### Context

Note: Removal removes the Contact from the Distribution List only —the Contact still exists in an Address Book. To remove a Contact permanently, deactivate or delete the Contact.

### Steps to execute

1. Open the Content Manager Explorer.

2. Navigate to the **Publication** > **Outbound E-mail** node.

3. Browse to a Folder and select a Static Distribution List.

4. Select one or more Contacts in the Static Distribution List, or use the Contact search functionality described in see Searching Contacts (see page 241) to locate specific Contacts.

   Note: To select several Contacts from the list, use the Shift key to select sequential Contacts and the Ctrl key to select non-sequential Contacts.

5. Click the **Remove Contacts from Distribution List** icon in the toolbar, or choose **Remove Contacts from Distribution List** from the context menu.

#### Result

Outbound E-mail removes the selected Contact, or Contacts, from the Static Distribution List.

### 19.5.5 Creating and modifying a Dynamic Distribution List

You can create a Dynamic Distribution List directly in a Folder in the Outbound E-mail node. You create a Dynamic Distribution List by defining filters in the same way as you define a Contacts search.

#### Requirements

To create a Dynamic Distribution List, you need:

- Distribution List Management rights and Write permissions for the destination Outbound E-mail Folder
- Category Management rights and Read permissions—needed to define filters based on Categories and Keywords

#### Context

You use Outbound E-mail fields, Contact details, and Keywords as filters. You can modify the filters defining the Dynamic Distribution List, in which case the Contacts it contains will change accordingly to match the changed filters.

#### Steps to execute

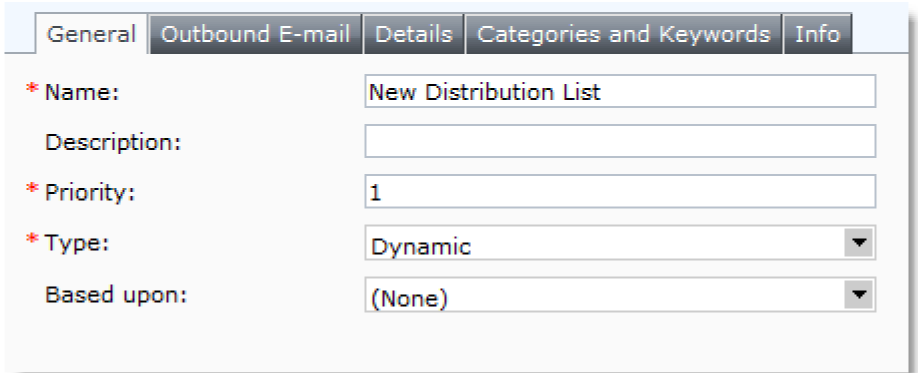
1. Open the Content Manager Explorer.

2. Navigate to the **Publication** > **Outbound E-mail** node.

3. Select a Folder in which your Dynamic Distribution Lists are stored:
   - To create a new Distribution List, do one of the following:
     - Click the **New Distribution List** icon in the toolbar.
     - Choose **New > Distribution List** in the context menu.

- To modify a Distribution List, select the Dynamic Distribution List and choose **Properties** in the context menu.

4. In the **General** tab:




   a. Enter a unique **Name**.

   b. Enter a **Description** (optional).

   c. Enter a number in the **Priority** field to assign an importance value (when a Mailing is sent to several Distribution Lists, the Mailing is sent first to Contacts in Distribution Lists with higher priority, where 1 is the lowest priority)

   d. Select `Dynamic` from the **Type** drop-down list.

   e. Optionally, create a Dynamic Distribution List **Based on** a Segment, Address Book or Dynamic Address Book:

      - If you select a Segment, the filters defined in the selected Segment are used in addition to other filters you may define and act on all Contacts within the Publication.
      - If you select a Dynamic Address Book, the filters defined in the selected Dynamic Address Book are used in addition to other filters you may define and act on Contacts within this Address Book.
      - If you select a regular Address Book, the filters you define act on Contacts within this Address Book.
      - If you make no selection, the filters act on all Contacts within the Publication.

   Note: For information on how you create a chain of filters to narrow down an audience you are targeting, refer to Contact filtering (see page 232).

5. In the **Outbound E-mail** tab, enter:

   - **E-mail address**—fill in all or part (the first characters) of an e-mail address.
   - **E-mail type**—specify the Contact's preferred e-mail format. Select either **HTML**, **Text**, or **Multi-part**.

- **Subscription status**—indicates the status of a Contact's subscription:
  - **Opted-in**—the Contact registered as a subscriber and confirmed the registration.
  - **Subscribed**—the Contact registered as a subscriber, but did not yet confirm the registration.
  - **Unsubscribed**—the Contact would not like to receive e-mail.
- **E-mail error status**—indicates whether problems have been encountered sending e-mails to the Contact:
  - **No problems**—e-mails sent to this Contact should arrive without incident.
  - **Temporary problems**—e-mails sent to this Contact have encountered temporary problems, for example, the Contact's e-mail Inbox was full.
  - **Persistent problems**—e-mails sent to this Contact have encountered permanent problems, for example the e-mail address of the Contact does not exist.
- **Active**—`Yes` or `No` indicating Contacts who can or cannot receive e-mails.

6. In the **Details** tab, you can specify Contact extended details to filter on.

   Note: Extended details are configurable and implementation specific.

7. In the **Categories and Keywords** tab, you can specify Keyword criteria to filter Contacts on their assigned Keywords:

   a. Click **Add**.

   b. Browse to and select a Keyword.

   c. Click **Insert**.

   d. Repeat the procedure to add more Keywords.

   e. Click **Close** when you have finished adding Keywords.

   f. To remove a Keyword, select it click the **Remove** button.

   Note: The list of **Keywords** displayed does not reflect Keyword hierarchy (the Keywords are displayed in a flat list). You can use multiple Keywords, from several Categories and in different Publications. A Contact can also have multiple Keywords from the same Category, for example, if a Contact is both a Business Contact and a Consumer Contact, both Keywords apply.

   Note: If a Category and Keyword in the list are both marked `***DELETED***`, the Keyword has been deleted.

8. Click **Save and Close** .

### Result

- Outbound E-mail creates a Dynamic Distribution List based on the specified filter criteria. The Dynamic Distribution List contains Contacts who meet the search criteria specified.
- By default, a new Distribution List is assigned a priority value of 1 (when a Mailing is sent, e-mails are sent to Contacts in order of Distribution List priority—the higher the value, the higher the priority).
- Outbound E-mail updates the Dynamic Distribution List. The Dynamic Distribution List contains Contacts who meet the revised search criteria.

## 19.5.6 Creating a snapshot of a Dynamic Distribution List

A Dynamic Distribution List changes constantly as Contact details change and Contacts are added and removed from the Address Book. To make a record of what Contacts were members of a Dynamic Distribution List at a specific moment in time, you can create a static copy of a Dynamic Distribution List.

### Requirements

To create or update a Distribution List you need Distribution List Management rights and Write permissions for the destination Outbound E-mail Folder.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Outbound E-mail** node.
3. Expand the Outbound E-mail Folder in which you have defined Distribution Lists.
4. Select a Dynamic Distribution List and choose **Create Static Copy** from the context menu.

### Result

Outbound E-mail creates a Static Distribution List from the Dynamic Distribution List. The static copy has the same name as the Dynamic Distribution List appended with the creation date and time. The Static Distribution List contains the Contacts that were part of the Dynamic Distribution List at the moment it was created.

### Next steps

To rename the Static Distribution List:

- Select the Static Distribution List and choose **Properties** from the context menu.

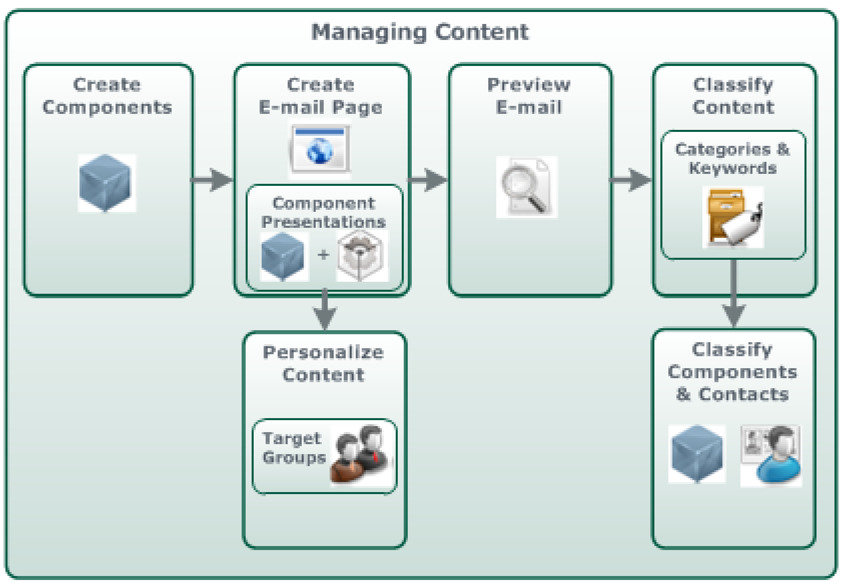
- In the **Name** field, change the name to your liking and click **Save and Close**.

## 19.6 Managing e-mail content

Managing e-mail content involves creating and personalizing the content of an e-mail used in an Outbound E-mail Mailing.

Creating E-mails involves performing the following tasks:

- **Create Components**—an e-mail message consists of one or more Components, each representing a piece of e-mail content.
- **Create E-mail Pages**—an E-mail Page represents an e-mail message and specifies the Components that are part of the e-mail message and how these Components, and the Page as a whole, should be displayed.
- **Personalize an e-mail Page**—when you create an E-mail page, you can specify which Target Group(s) each Component Presentation is intended for (used to personalize a Mailing).
- **Classify Content**—you use Categories and Keywords to classify content (Components) and specify Contact preferences and interests which you can then use as a basis for creating Distribution Lists.
- **Create Folders**—Folders are used to organize your Mailings and Distribution Lists (in the Outbound E-mail node) and Segments (in the Audience Manager node).




### 19.6.1 Creating Folders for Mailings, Distribution Lists and Segments

You use Folders to organize content: Mailings and Distribution Lists in the **Outbound E-mail** node, and Segments in the **Audience Manager** node.

### Requirements

To create a Folder for Audience Manager or Outbound E-mail you must have Outbound E-mail Folder Management rights and Write permissions for the containing Folder.

### Context

Note: To modify security settings for a Folder, you must first save the Folder. You can then edit the Folder in order to modify security settings.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to one of the following:
   - **Publication** > **Outbound E-mail** > **Mailings and Distribution Lists** root Folder.
   - **Publication** > **Audience Manager** > **Segments** root Folder.
3. Select a Folder and click the **New Folder** icon on the toolbar.

   A **New Folder** window opens.
4. In the **New Folder** window, enter:
   - A logical **Name**
   - A **Description** (used internally for other users of Outbound E-mail to understand the Folder's purpose)
5. Click **Save and Close** .

### Result

The Content Manager creates a Folder. You can edit the Folder to modify its properties by selecting the Folder and choosing **Properties** from the context menu.

## 19.6.2 Creating Components

An e-mail message consists of one or more Components. A Component represents a piece of e-mail content.

### Requirements

To create a Component you must have:

- Component Management rights and Write permissions for the containing Folder
- Schemas available to you which define the structure of the Content

### Context

Components are based on Schemas, which define the structure of the content. When you create a Component, you select a Schema that defines the type of Component that you want to create. You create Components in Folders within a Publication.

Note: For more information on Components and Component field types, see the *SDL Tridion User Manual*.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Building Blocks** Folder.
3. Select a Folder in which you want to create the Component and click the New Component icon in the toolbar.
4. On the **General** tab, fill in the following fields:
   - **Name** — the name of the Component
   - **Schema** — the Schema on which this Component will be based (if your SDL Tridion system administrator defined a mandatory Schema for the Folder in which you create a Component, the Content Manager a selects a Schema for you.)

   After you have selected a Schema, a series of fields appears. Fill in all mandatory fields and optional fields as necessary. Mandatory fields have a red * beside them.
5. A Component may also use Metadata fields. If so, a Metadata tab appears. Select the Metadata tab (if applicable) and fill in the mandatory fields and, if applicable, the optional fields.
6. Click **Save and Close** .

### Result

You have created a Component.

## 19.6.3 Creating and previewing an e-mail Page

An E-mail Page in Outbound E-mail represents an e-mail message.

### Requirements

To create a Page you must have:

- Page Management rights and Write permissions for the containing Structure Group
- Page Templates and Component Templates available to you that define the visualization of Components and Pages

## Context

Creating an E-mail Page involves the following tasks:

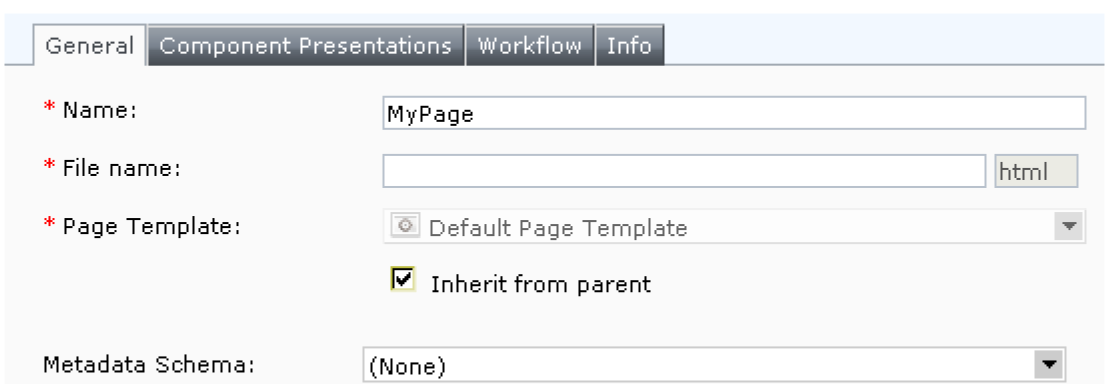
- specifying how the Page as a whole should be displayed
- specifying which Components are part of the e-mail message
- specifying how these Components should be displayed
- specifying which Target Group or Target Groups each Component is associated with
- previewing and saving the E-mail Page

## Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the Publication and Structure Group in which you want to create the Page.
3. Select a Structure Group and click the **New Page** icon in the toolbar.

   A **New Page** window appears.
4. On the **General** tab, fill in the following fields:
   - **Name** — the name of the Page must be unique within the Structure Group in which you create it. Content Manager Explorer displays this name in the list view.
   - **File name** — you must make the file name unique within the Structure Group in which you create it. This is the name of the Page as it will appear on the Web site.
   - **Page Template** — the Page Template that the Content Manager will use to render the Page. If you click the **Inherit From Parent** option, the Page uses the default Page Template specified for the parent Structure Group or Publication.

     Note: For information on templating, see the Outbound E-mail Implementation Manual.
   - **Metadata schema** — (Optional) you can select a metadata schema to create metadata values for the Page. You must fill in any mandatory metadata fields before you can save the Page.



5. On the **Component Presentation** tab, click the **Add** button.

6. Select the Component you want to add in one of the following ways:
   - In your **Building Blocks** Folder structure, navigate to the location of the Component you want to add.
   - In your **Categories and Keywords**, select a Keyword. The List View displays Components that have been classified with this Keyword or a child Keyword.

   When you have located the Component(s) you want to add, do the following

   a. In the list view, select one or more Components.

   b. Select a Component Template. If you select more than one Component, the Component Template is applied to all of the selected Components.

   c. Click the **Insert** button. A message appears at the bottom of the pane which confirms that you have added one or more Component Presentations to the Page.

   d. Repeat this step to add additional Components.

   e. After you finish adding Component Presentations, click **Close** to close the Component Presentations dialog.

   f. Click the **Move up** button or the **Move down** button to adjust the ordering of the Component Presentations on the Page.

7. On the **Target Group** tab, you can define which category of user the content is intended for by selecting Target Groups. For more information, see the following tasks:

   a. Creating Target Groups for Outbound E-mail (see page 295)

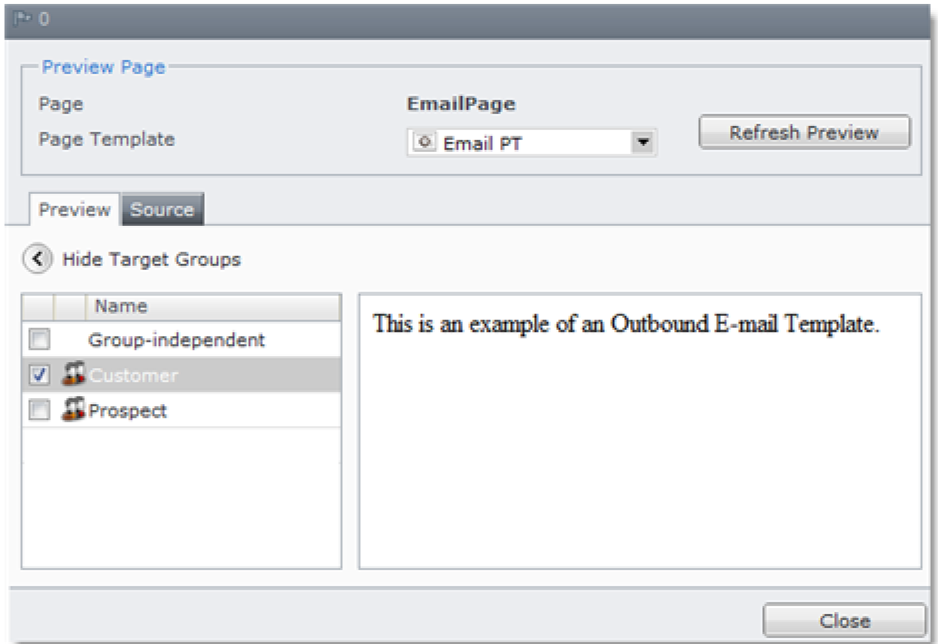
   b. Personalizing an e-mail Page (see page 285)

8. To preview the mailing for a specific Target Group or Target Groups, click **Preview** on the Ribbon toolbar:

   a. In the **Preview** tab, clear the check box marked **Group-independent**.

   b. Select one or more Target Group check boxes in the list.

   c. Click the **Refresh Preview** button to see the E-Mail Page as it will appear to members of this Target Group (Merge Fields remain unresolved). If you selected multiple Target Groups, the preview shows you the e-mail as it will appear to a Contact who belongs to any of these groups.




If you select the **Group-independent** check box, the preview contains all content.

9. Click **Save and Close** .

### Result

You now have an E-mail Page that you can send out as a Mailing. Note that when this E-mail Page is sent out, Outbound E-mail:

- Excludes or includes Component Presentations based on the Contact's Keywords.
- Replaces all Merge Fields with the appropriate values for each specific Contact (see the Adding Merge Fields (see page 294)).

### Next steps

To test and send a Mailing, see Managing Mailings (see page 288).

## 19.6.4 Personalizing an e-mail Page

You can personalize the content of a Mailing using Target Groups.

### Requirements

To associate Target Groups with Component Presentations on a Page you must have:

- Page Management rights and Write permissions for the containing Structure Group
- Target Groups available—for more information, see Creating Target Groups for Outbound E-mail (see page 295)

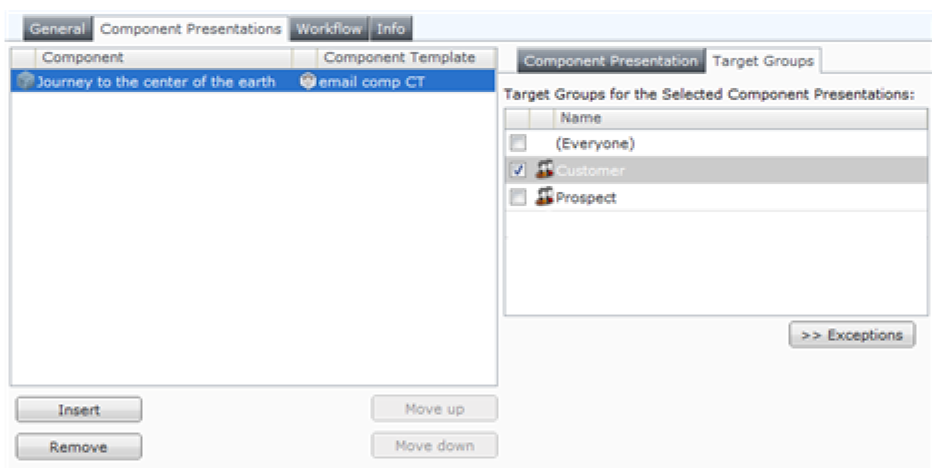
## Context

A Target Group defines a category of user and in Outbound E-mail is defined using Keywords. A Contact is a member of the Target Group if they have the Keyword specified by the Target Group. Target Groups allows you to include or exclude parts of a Mailing to certain groups of Contacts, depending on their Target Group membership. For each Component Presentation on a Page (an e-mail fragment), you can specify the Target Group it applies to.

## Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Structure Group** where your e-mail Pages are located and open an E-mail Page.
3. On the **Component Presentation** tab, click the **Target Groups** subtab. A series of check boxes appears, one for **(Everyone)** and one for each Target Group in the Publication.
4. Select a Component Presentation, clear the **(Everyone)** check box, and select one or more Target Groups (the mailing recipients who match the profile defined in these Target Groups will see this Component Presentation).

   The following example shows Target Groups defined for Customers and Prospects, allowing you to send different content in the Mailing to different mail recipients depending on whether they are customers or prospective customers:

   Note: If you select multiple Target Groups, a visitor will see the Component Presentation if they are a members of any of the selected Target Groups.

5. Repeat the process each Component Presentation for which you want to set Target Groups.
6. On the **Preview** tab, preview the E-mail Page for each Target Group. For more information, see Creating and previewing an e-mail Page (see page 282).

7. Click **Save and Close**.

**Result**

You have defined the Target Groups for content in an E-mail Page.

**Next steps**

To test and send a Mailing, see: Managing Mailings (see page 288).

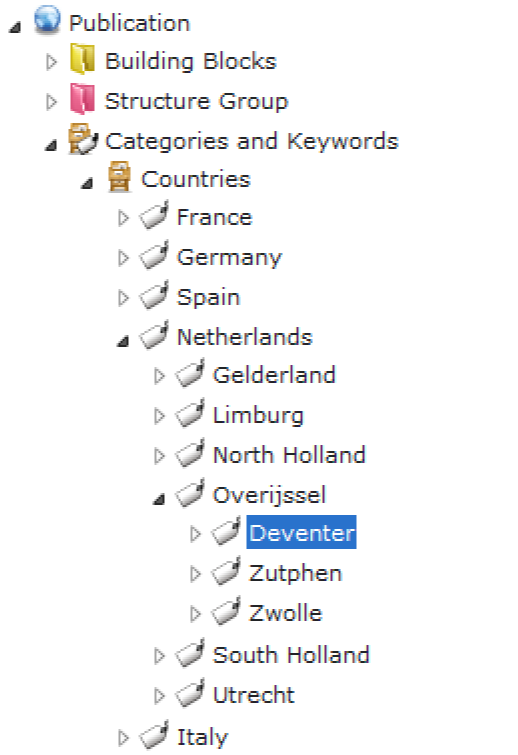
## 19.6.5 Classifying Content and Contacts

You use Categories and Keywords to classify content and Contacts.

A Category is a general classification and a Keyword is a value in a Category. You can use these Keywords to:

- **Classify Content**—the primary purpose of Categories and Keywords in Content Manager is to classify and tag content (Components). Classifying your content helps you find related content.
- **Classify Contacts**—the secondary purpose of Categories and Keywords is to specify Contact preferences and interests which you can then use to define:
  - Dynamic Distribution Lists
  - Segments
  - Target Groups

The following image shows an example of a taxonomy (Categories and Keywords):



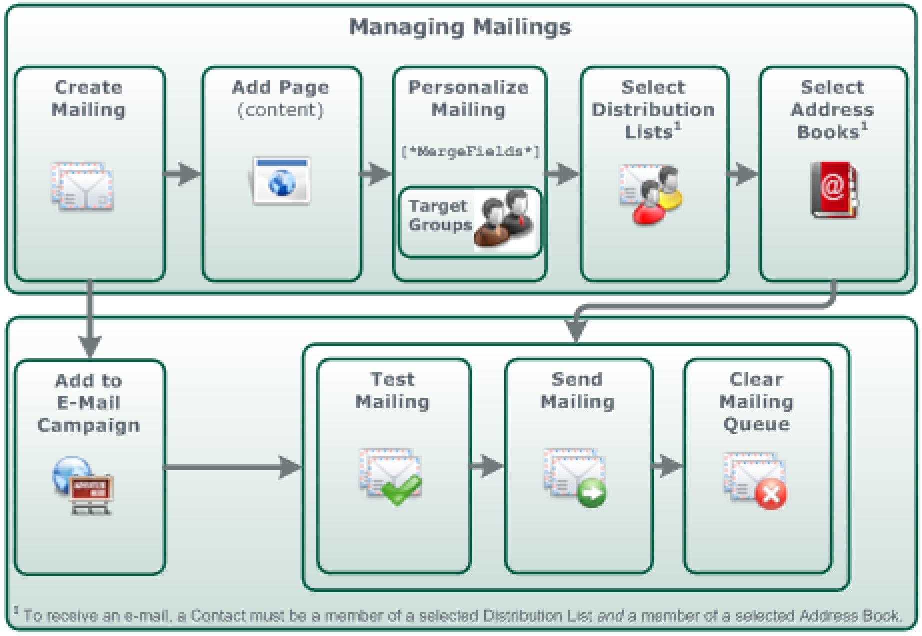

Note: Categories or Keywords are usually created in a parent Publication by an implementor and inherited down the BluePrint hierarchy. In other words, you do not normally create Categories and Keywords as these are created for you. A possible exception is if you import a file with Contacts that you only want to use within a specific Publication, and these Contacts use different Categories and Keywords from those of your regular Contacts (because you obtained them from an external source).

## 19.7 Managing Mailings

Mailings combine content (the e-mail) with Contacts (the recipients of a Mailing).

Managing Mailings involves performing the following tasks:

- Create a Mailing
- Personalize a Mailing using Merge Fields and Target Groups
- Create an E-mail Campaign
- Test a Mailing before sending it out
- Send a Mailing (immediately or at a scheduled time)
- Trigger a Mailing (sending an e-mail as a response to a specific event)
- Clearing the e-mail queue




Note: You organize Segments into Folders. For more information, refer to Creating Folders for Mailings, Distribution Lists and Segments (see page 280).

## 19.7.1 Creating a Mailing

A Mailing combines Contacts (the recipient or target audience of a Mailing) and Content (the e-mail itself).

### Requirements

- To create a Mailing, you need Mailing Management rights and Write permissions for the Folder.
- You must have created at least one Distribution List
- You must have created an E-mail Page
- You must have created Folders to organize your Mailing

### Context

Creating a Mailing involves:

- Filling in general Mailing settings
- Specifying an E-mail Page (content and design)
- Specifying Distribution Lists containing the target audience of your Mailing (Contacts)
- Specifying the Address Books to which the Contacts in your Distribution Lists must belong
- Previewing and saving the Mailing

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Outbound E-mail** node.

3. Select the Folder in which your Mailings are stored and click the **New Mailing** icon in the toolbar:

   The **New Mailing** window appears.

4. In the top section of **General** tab, fill in the following:

   a. **Mailing title**—enter a descriptive name that is unique across all Mailings (this field is used internally only).

   b. **E-mail subject**—enter the text displayed in the e-mail subject field.

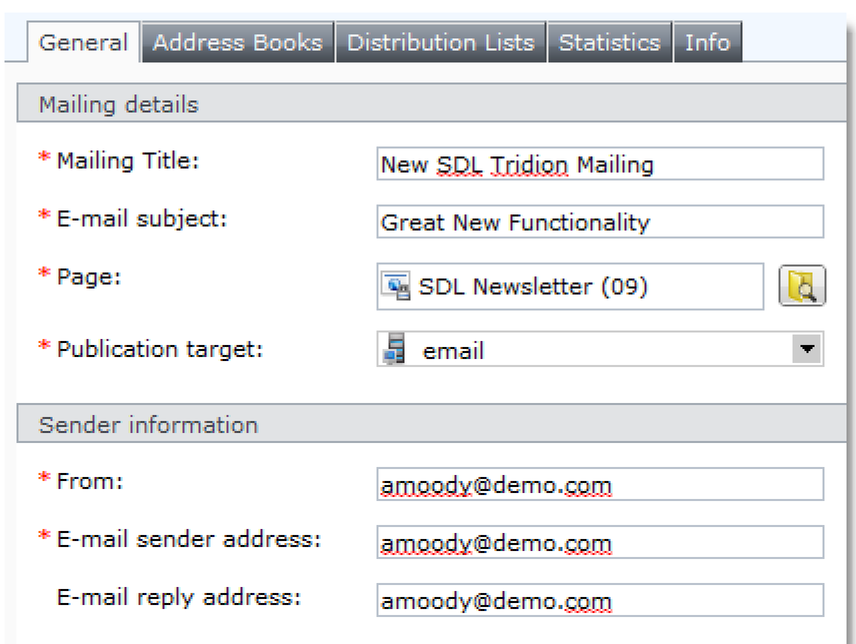
   c. **Page**—select the E-mail Page you want to send. Click the **Browse** button to display the **Page Picker** in a separate window, then browse through the available Pages to select an E-mail Page and click **OK**.

   d. **Publication Target**—select a Publication Target that is used to render the Mailing when you test it (when you send the Mailing it uses the rendered content the last time the Mailing was tested).

   e. **From**—enter the name of the sender you want to appear in your e-mail.

   f. **E-mail reply address**—enter the e-mail address where replies to this e-mail are sent, if different from the **E-mail sender address**.

   g. **E-mail sender address**—enter the e-mail address from which the e-mail is sent.

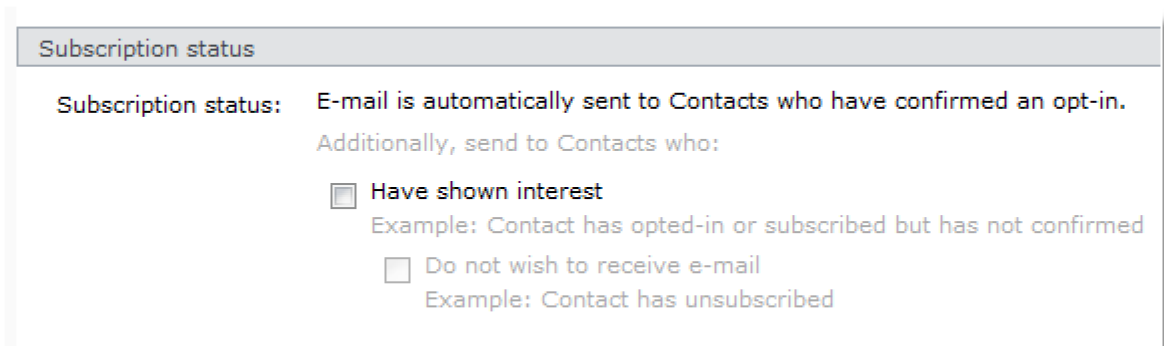


Note: You can use Merge Fields in the following fields:

- **E-mail Subject**
- **From**
- **E-mail Sender Address**
- **E-mail Reply Address**

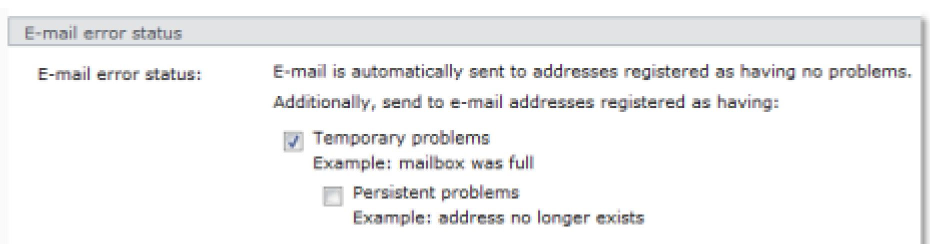
For more information, see Adding Merge Fields (see page 294).

5. By default, e-mails are sent to all Contacts who have confirmed their subscription (opted-in). In the **Subscription Status** field, you can also choose to send e-mails to Contacts with a different subscription status:
   - Select the **Have shown interest** check box to send to Contacts who have indicated interest (opted-in or subscribed but have not confirmed).
   - Select the **Do not wish to receive e-mail** check box to also send to Contacts who do not wish to receive e-mails (opted-out or unsubscribed).

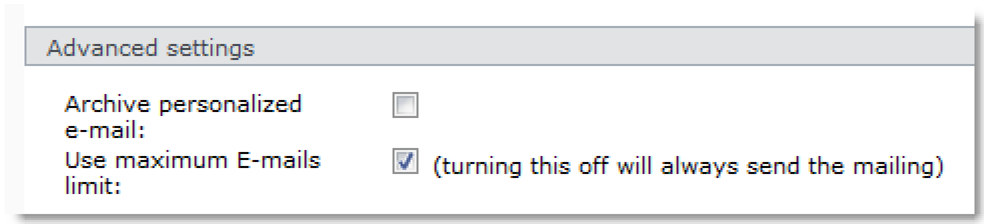



Note: Selecting the **Do not wish to receive e-mail** check box is not recommended and may have legal consequences.

6. By default, e-mails are sent to all addresses where there is no record of having problems delivering the message. In the **E-mail error status** field, you can also choose whether to send e-mails to addresses that have experienced problems:
   - Select the **Temporary problems** check box to send the e-mail to addresses that encountered a temporary problem with delivery, for example because the recipient's mailbox was full.
   - Select the **Persistent problems** check box to also send the e-mail to addresses that have encountered persistent problems, for example the e-mail address does not exist.



7. In the **Advanced settings**, select **Archive personalized e-mail** check box to have Outbound E-mail save each e-mail message it sends out, which you can then view by examining the Mailing statistics for a Contact. For more information, see Viewing Contact e-mails (see page 245).




Note: The **Archive personalized e-mail** option is configurable and may not be available. If you do select this check box, make sure that there is sufficient database storage for all the e-mails that you will send out.

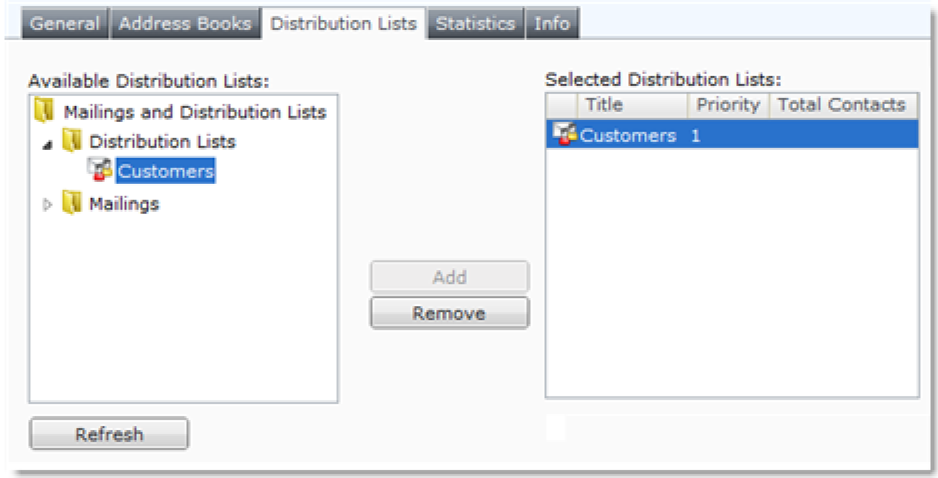
8. In the **Advanced settings**, select or deselect the **Use maximum E-mails limit** check box:
   - selecting prevents the e-mail from being sent if the Contact has already received the configured maximum number of e-mails within a designated period of time
   - deselecting sends e-mails regardless of whether the maximum permitted for a Contact has been reached

Note: The **Use maximum E-mails limit** option is designed to minimize Contact irritation, for example when people are receiving too much mail. As a rule, subscribers will want to receive e-mails to newsletters they have subscribed to and are less interested in other marketing e-mails. For information on configuring the maximum e-mails limit, see the *SDL Tridion Installation Guide*.

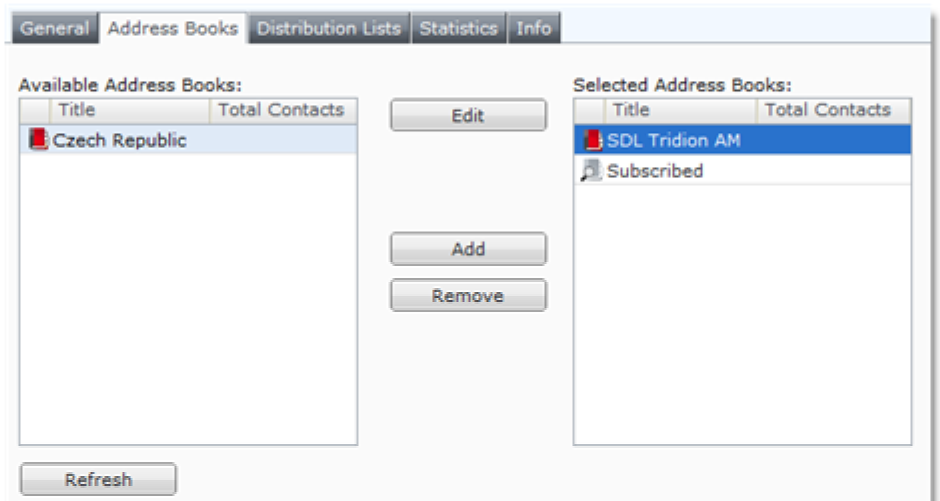
9. After you have tested the Mailing, you can select **Triggered mailing**:
   - **Start Date**—specify a start date
   - **End Date**—specify an end date

   For more information, see Triggering a Mailing (see page 308).

10. In the **Distribution List** tab, select Distribution Lists from the **Available Distribution Lists** and click **Add** to add them to the **Selected Distribution Lists**. Contacts in the selected Distribution Lists are the target recipients of a Mailing (if they are also a member of a selected Address Book):
    - You can see how many members a Distribution List has by examining the **Total Contacts** column.
    - The **Refresh** button will refresh the numbers displayed in the screen after you have refreshed statistics. For more information, see Refreshing statistics (see page 323).
    - The **Priority** column shows the order in which Distribution Lists are processed when the Mailing is sent (the higher the number, the sooner the e-mails are sent).




11. In the **Address Books** tab, select Address Books from the **Available Address Books** and click **Add** to add them to the **Selected Address Books**:




To receive an e-mail, a Contact must fulfill the following criteria:

- Must be a member of a selected Distribution List.
- Must also be a member of a selected Address Book.

12. Click **Save**.

13. Click **Preview** (in the **General** tab) to verify that the e-mail message looks the way you want it to look.

14. Click **Save and Close** .

### Result

You have created and previewed a Mailing.

## 19.7.2 Personalizing a Mailing

Personalizing a Mailing involves adding personal details to a Mailing and sending different versions of a Mailing tailored to specific characteristics and interests of an individual Contact. This section describes how you can personalize a Mailing in Outbound E-mail using **Merge Fields** to personalize fields and **Target Groups** to personalize content.

### Adding Merge Fields

In Outbound E-mail, you can personalize an e-mail message to an individual Contact by adding to it the Contact's surname or telephone number in the text of the e-mail. Outbound E-mail allows you to personalize individual fields through the use of Merge Fields.

A Merge Field is a piece of text that represents a specific Contact Detail, such as a telephone number or the organization to which the Contact belongs. You can enter Merge Fields wherever text may appear, but in most cases you will use Merge Fields in the following places:

- In the **E-mail Subject**, **From**, and **E-mail Sender Address** fields of a Mailing
- In a Component field
- In Component Templates or Page Templates

To insert a Merge Field, you wrap the name of a Contact Detail in angled brackets and asterisks as follows:

```
[* ContactDetail *]
```

where `ContactDetail` is the name of a Contact Extended Detail field. For example, if your Contact's extended details consists of the fields described in the table below, you can insert the following Merge Fields in a Mailing to create a Mailing personalized to each individual who receives the Mailing:

```
[* Salutation *][* Prefix *][* Surname *]
```

The result would be, for example, personalized text inserted in the e-mail such as "Dear Mr Moody" or "Dear Mrs Popova".

| Contact Extended Detail Name | Description |
|---|---|
| `Salutation` | A phrase preceding the name in a letter heading, for example "Dear" |
| `Prefix` | The title of a person, such as "Ms", "Dr" or "Mr" |
| `Name` | The Contact's first name, such as "Penelope" or "Federico" |
| `Surname` | The Contact's surname, such as "Horowitz" or "Smithers" |
| `EmailAddress` | The Contact's e-mail address |

| Contact Extended Detail Name | Description |
|---|---|
| `Company` | The organization to which the Contact belongs. |

Important:Contact Extended Details are configurable and therefore vary depending on your implementation of Outbound E-mail.

## Creating Target Groups for Outbound E-mail

A Target Group defines a category of user. In Outbound E-mail, you can personalize the content of a Mailing using Target Groups.

### Requirements

- To create a Target Group you must have Customer Management rights and Write permissions for the containing Folder.
- You must have created a taxonomy for Outbound E-mail Contacts (the definition of a Target Group in Outbound E-mail is based on Keywords).

### Context

Target Groups define a set of user characteristics (of mail recipients, in the case of Outbound E-mail). You use Target Groups to display different content —of what is essentially the same Mailing— to different Contacts depending on what Target Group(s) the Contact is a member of.

For example, if you have a Mailing that you want to send to Customers and Prospects because it is essentially the same, except with one small difference which is applicable for Customers only, you can create a Target Group called Customer and associate the content (the Component Presentation on a Page) with this Target Group. The result is that the e-mail sent to a Contact marked as a Customer will be slightly different to the e-mail sent to a Contact marked as a Prospect.

Keywords are properties or attributes of a Contact that define a Contact's preferences and interests, such as a preferred brand of car or hobbies. A Contact may have multiple Keywords from one or more Categories.

You create Target Groups in a Folder in the Building Blocks of a Publication.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Building Blocks** Folder.
3. Select a Folder in which you want to create the Target Group and Click the New Target Group icon in the toolbar.

   The **New Target Group** window opens.
4. In the **General** tab, enter a unique **Name** and a **Description** for the Target Group.
5. In the **Definition** tab:

a. Select **Tracking Keys**.

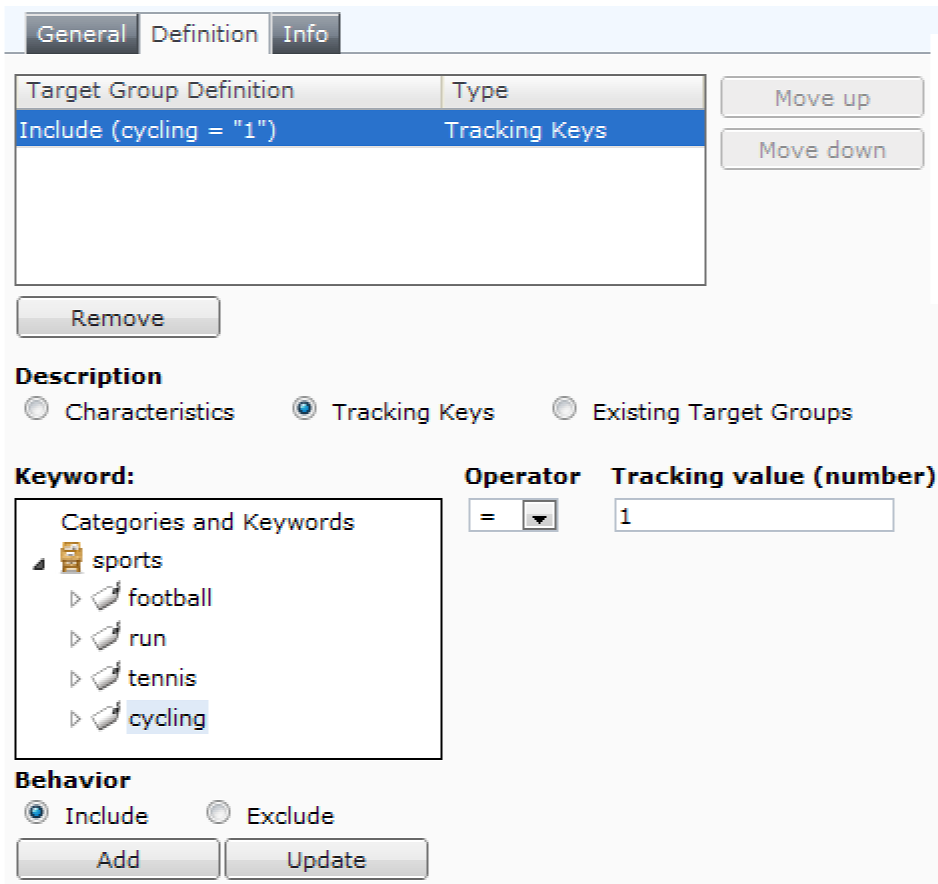
b. Select a **Keyword** from the list of Keywords.

c. Select = as the comparison **Operator**.

d. Enter 1 in the **Tracking value (number)** text box.

e. Select **Include** (include Contacts with these Keywords) or **Exclude** (exclude Contacts with these Keyword and include all others).

f. Click **Add**. The Keyword appears in the **Target Group Definition**.




Important:The definition and implementation of Tracking Keys in Outbound E-mail differs from the regular implementation in SDL Tridion. In Outbound E-mail, you must use the construction `<Keyword> = 1`. Outbound E-mail then considers a Contact to be a member of a Target Group if he or she has:

- all the Keywords you selected (**Include**)
- none of the Keywords you selected (**Exclude**)

6. Repeat this step to add multiple Keywords to include or exclude from the same Category, or from other Categories.

7. Click **Save and Close** to save your new Target Group.

#### Result

You have created a Target Group.

#### Next steps

When you have created your Target Groups you can associate a Component Presentation in an E-mail Page with one or more of these Target Groups to personalize the content of an e-mail.

### 19.7.3 Testing a Mailing

Before you can actually send out or schedule the Mailing, you must first test it.

#### Requirements

- To test a Mailing, you need Mailing Execution rights and Read permissions for the Outbound E-mail Folder.
- You need to have created a Mailing and have a valid test e-mail address to send e-mail messages to.

#### Context

You can send the test Mailing to a specific e-mail address (for example your own e-mail address) or to a list of Contacts in a static Distribution List. It is recommended to create a static Distribution List for testing purposes in which you add Contacts representing all possible variations of e-mails. For example, add a Contact for each Target Group used, add Contacts who prefer HTML or plain text, send to Contacts with different mail providers, and so on.

It is important to realize that Outbound E-mail always sends the last tested Mailing: if you make a change to a Mailing and send it out without testing it, the changes will not be reflected in the sent e-mail.

Note: If you have created a Triggered Mailing, you can no longer test it. To test a Triggered Mailing, you must first deactivate the trigger, test it, and then set the trigger again. For more information, see Triggering a Mailing (see page 308).

#### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Outbound E-mail** node.
3. Select the Outbound E-mail Folder in which your Mailings are stored and in the list view select the Mailing you want to test and click the **Test Mailing** icon in the toolbar.

   The **Test Mailing** window appears.

4. In **Mailing details**, you can click **Preview** to verify that the e-mail message looks the way you want it to look.

5. In **Send test Mailing to**,

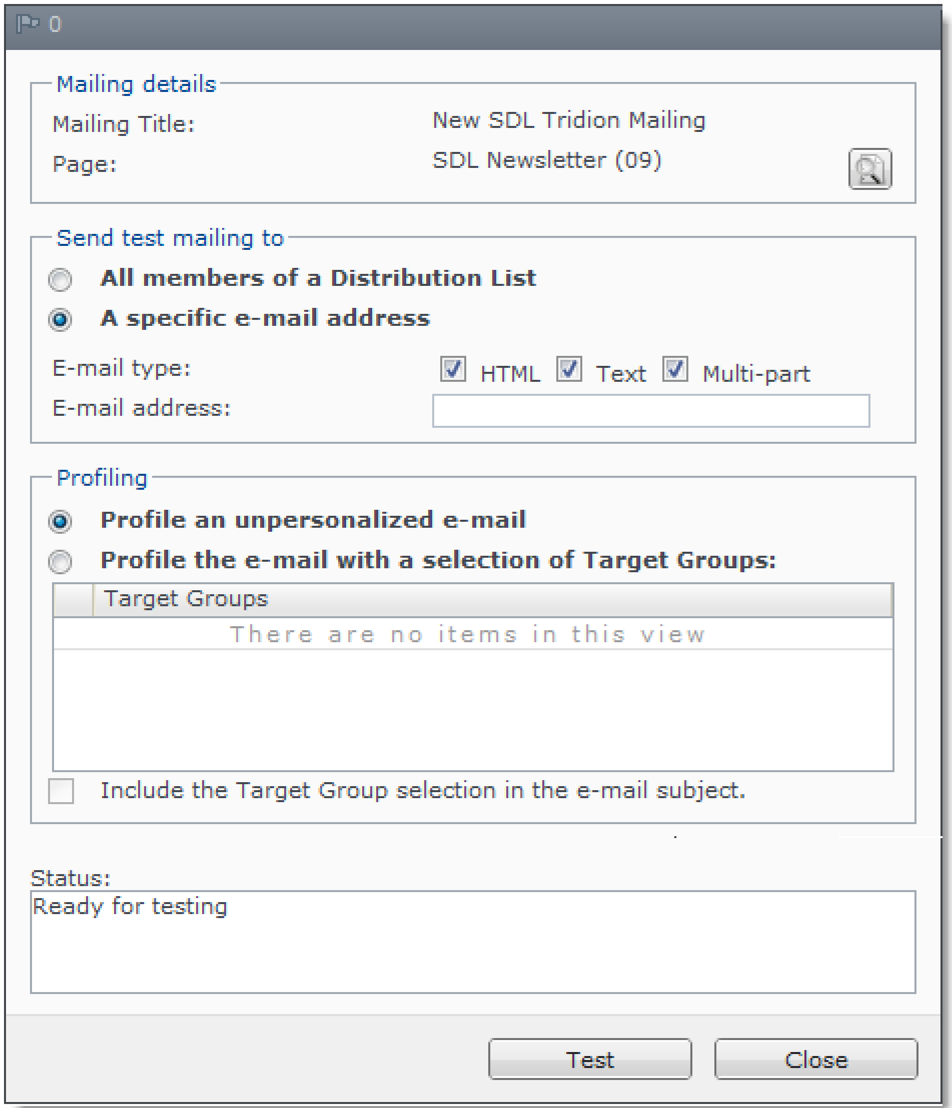
   - Select **A specific e-mail address** and follow the steps below.
   - Select **All members of a Distribution List** and follow the steps described in step 6.

   If you chose to send the test Mailing to a **A specific e-mail address**:

   a. Enter an **E-mail Address** specifying to whom you want to send the test e-mail (separate multiple e-mail addresses with a comma).

   b. Specify the **E-mail Formats** you want to send the e-mails in Mailing (Outbound E-mail sends a test e-mail for each format chosen):

      - Select **HTML**—to send an HTML version of the E-mail Page in your message
      - Select **Text**—to send a plain text version of the E-mail Page.
      - Select **Multi-part**—to send a multi-part e-mail. A multi-part e-mail appears as HTML if the recipient has an e-mail application that supports HTML; otherwise, it appears as plain text.

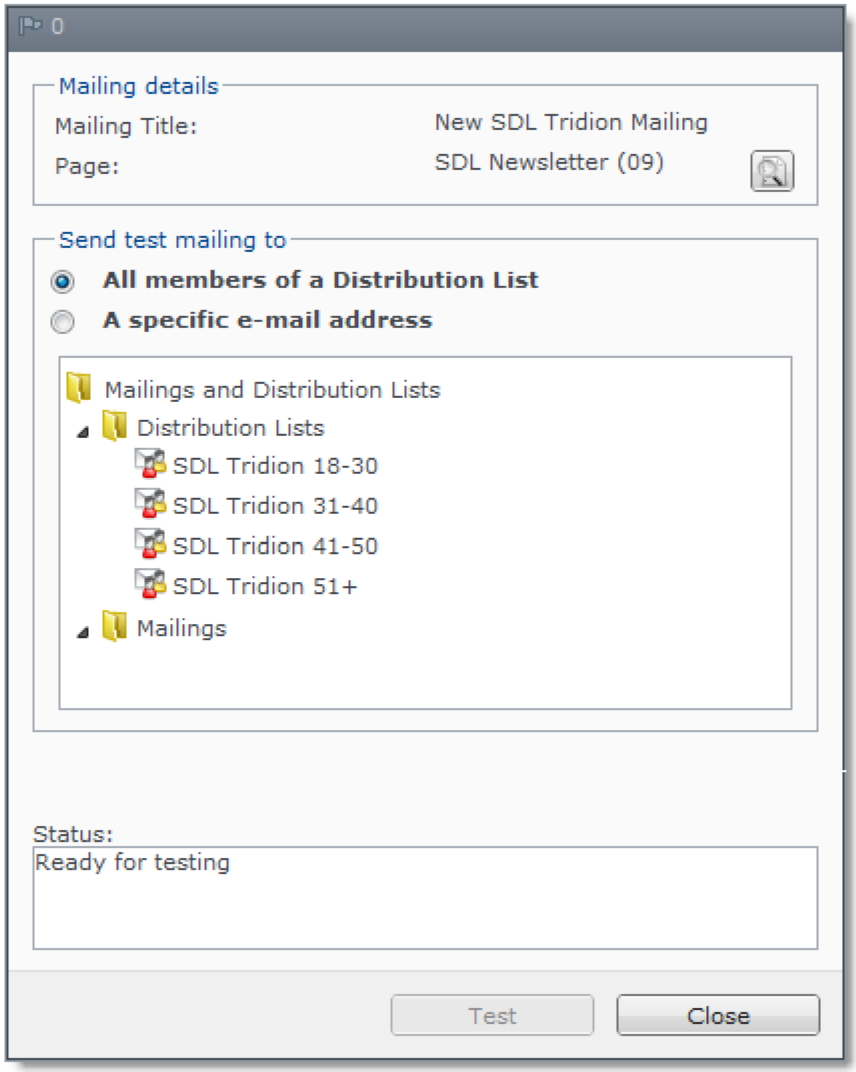



6. If you chose to send the test Mailing to **All members of a Distribution List**:

   a. Select a Distribution List from the list.

   b. Click **OK**.

   c. Click **Test**.




Note: An warning message is displayed if the selected Distribution List contains more than 100 Contacts, or none.

7. In **Profiling**, you can test what the e-mail looks like to a member of a specific Target Group:

   Note: By default, the **Profile an unpersonalized e-mail:** option is selected in which case a generic, all-inclusive e-mail message is sent.

   a. Select the **Profile the e-mail with a selection of Target Groups:** option.

   b. Select one or more Target Groups from the list (use the Shift key to select multiple adjacent Target Groups, and the Ctrl key to select multiple non-adjacent Target Groups).

c. Select **Include the Target Group selection in the e-mail subject** if you want the subject of the e-mail message to contain text specifying the Target Group or Target Groups for whom this e-mail message is intended.

8. Click **Test**.

9. Review the sent e-mail.

### Result

- The Mailing is now tested and this is indicated by the icon which changes from  to 
- If you chose to test the Mailing by sending it to specific e-mail address, Outbound E-mail sends a test e-mail for each format chosen to the address using the chosen profile (Target Groups).
- If you chose to test the Mailing by sending it to a Distribution List, Outbound E-mail sends a personalized test e-mail to each Contact in the list in a format specified in each Contacts details.

## 19.7.4 Creating an E-mail Campaign

An E-mail Campaign allows you to coordinate a Mailing campaign by grouping several Mailings together and testing and sending them in one go. You can add Mailings from multiple Publications in an E-mail Campaign.

### Requirements

- To create or edit an E-mail Campaign, you need Mailing Execution rights.
- You must have created Mailings to add to the E-mail Campaign—see Creating a Mailing (see page 289).

### Context

An E-mail Campaign allows you to:

- Coordinate the sending of a single e-mail across multiple Publications
- Coordinate the sending of a series of e-mails consisting of, for example, a Start Mailing, Scheduled Mailing, Triggered Mailing and Reminder Mailing

You can create an E-mail Campaign directly, or you can create one when you add a Mailing to an E-mail Campaign.

### Steps to execute

1. Open the Content Manager Explorer.

2. Create (or open) E-mail Campaigns in the **Shortcuts** view:

   a. Select the **E-mail Campaigns** node and choose **New** > **E-mail Campaign** in the context menu.

b. Enter a unique **Name** and optionally a **Description**.

c. Click **Save**.

d. Add a Mailing to an E-mail Campaign by clicking **Add**, then navigate to and select a Mailing and click **OK**.

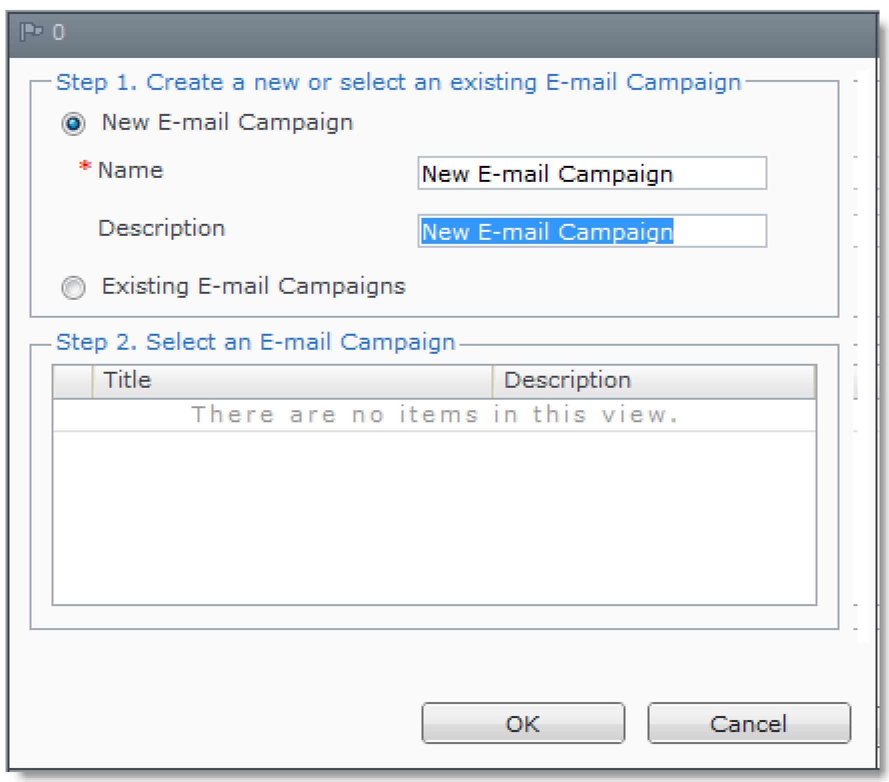
3. Alternatively, create a new E-mail Campaign as follows:

a. Select a Mailing and click the **Add to E-mail Campaign** icon in the toolbar or choose **Add to E-mail Campaign** in the context menu.

b. Select the option **New E-mail Campaign**.

c. Enter a unique **Name** and optionally a **Description**.

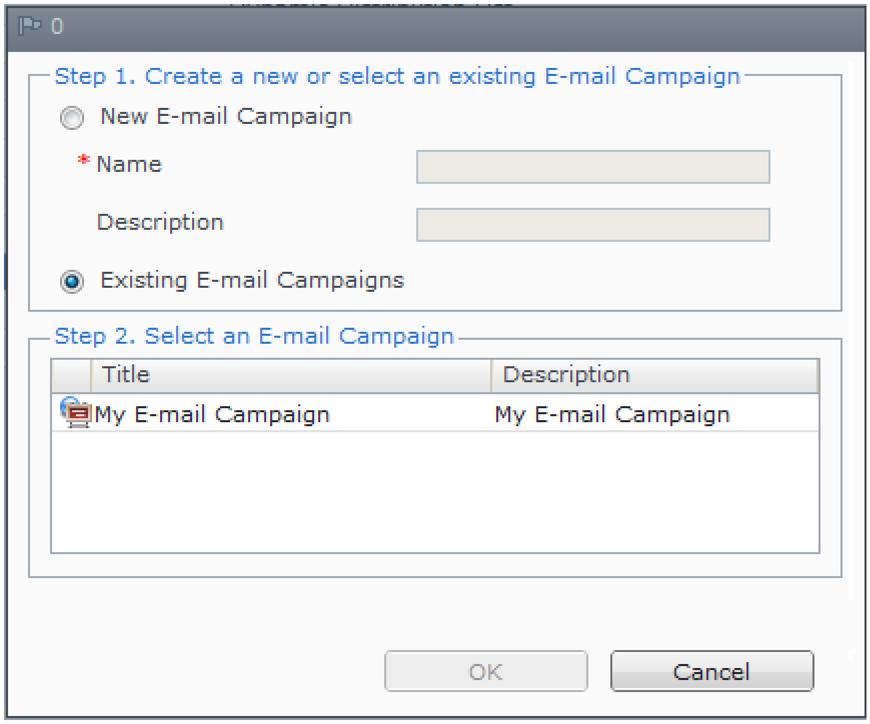
d. Click **OK** to create an E-mail Campaign and add the selected Mailing to it.




4. When you select **Add Mailings to E-mail Campaign** you can choose to create a new E-mail Campaign (as described above) or add the Mailing to an existing E-mail Campaign:

a. Select **Existing E-mail Campaigns**.

b. Select an E-mail Campaign from the list and click **OK**.

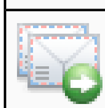



c. Open the E-mail Campaign: in the **Shortcuts** view select the **E-mail Campaigns** node, select the E-mail Campaign in the list view and choose **Open** in the context menu.

5. In the E-mail Campaign **General** tab, you can view the included Mailings and perform the following actions:

   - **Move up** and **Move down**—arranges the list order of the Mailings displayed in the E-mail Campaign (usually, you will want to display Mailings in a chronological order, although the order in which e-mails themselves are sent depends on the priority of each Distribution List in an individual Mailing.
   - **Open**—opens selected Mailings
   - **Go to**—goes to the Folder location of the selected Mailing
   - **Add**—allows you to add a Mailing to the E-mail Campaign
   - **Remove**—removes the selected Mailing from the E-mail Campaign

6. In the E-mail Campaign Ribbon toolbar you can perform the following actions:

| Option | Description |
|---|---|
|  | **sends all Mailings in the E-mail campaign (seeSending all Mailings in an E-mail Campaign (see page 304))** |
|  | **sends the selected Mailing (see Sending a Mailing (see page 306))** |

| | |
|---|---|
|  | **tests the selected Mailing (Testing a Mailing (see page 297))** |
|  | **refreshes the last tested column and the statistics, if you have performed a refresh of the statistics (see Refreshing statistics (see page 323))** |

7. The E-mail Campaign **General** tab displays various columns for each Mailing:
   - **Last tested**—indicates when the Mailing was last tested, important because this Mailing is the one which is sent irrespective of whether the Mailing has since changed.
   - **Start date** and **End date**—indicates for Triggered Mailings the timeframe when e-mails are sent.
   - Other columns display statistics for the Mailings—for more information, see Viewing Mailing statistics (see page 311).

8. Click **Save and Close** .

### Result

Outbound E-mail creates or updates an E-mail Campaign and adds the selected Mailing to the E-mail Campaign. The E-mail Campaign is created in the **E-mail Campaigns** node, where users with Mailing Execution rights can view, edit, test, and send the E-mail Campaign.

## 19.7.5 Sending all Mailings in an E-mail Campaign

When you group E-mails in an E-mail Campaign you can choose send all Mailings in one go.

### Requirements

- To send a Mailing, you need Mailing Execution rights and Read permissions for the Outbound E-mail Folder.
- You must have tested the Mailing—Outbound E-mail always sends the last tested e-mail, therefore if you make a change and send the mail without testing the change will not be reflected in the sent e-mail.

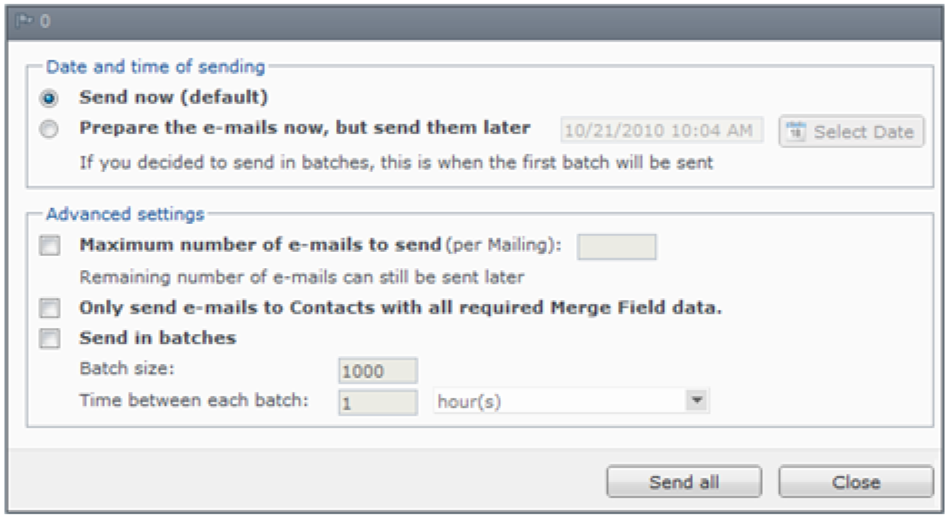
### Steps to execute

1. Open an E-mail Campaign: in the **Shortcuts** view select the **E-mail Campaigns** node, select the E-mail Campaign in the list view and choose **Open** in the context menu.

2. Click **Send All** in the toolbar to send all Mailings in the E-mail campaign.

3. Specify **Date and time of sending** settings:
   - Select **Send now**.

- Select **Prepare the e-mails now, but send them later** and click the Calendar icon to select the date and time at which you want Outbound E-mail to start sending e-mails. When you select this option, Outbound E-mail fixes the list of Contacts in the Mailings, though Contact details and personalized fields are resolved at the moment of sending therefore any changes will be reflected in the sent e-mail.

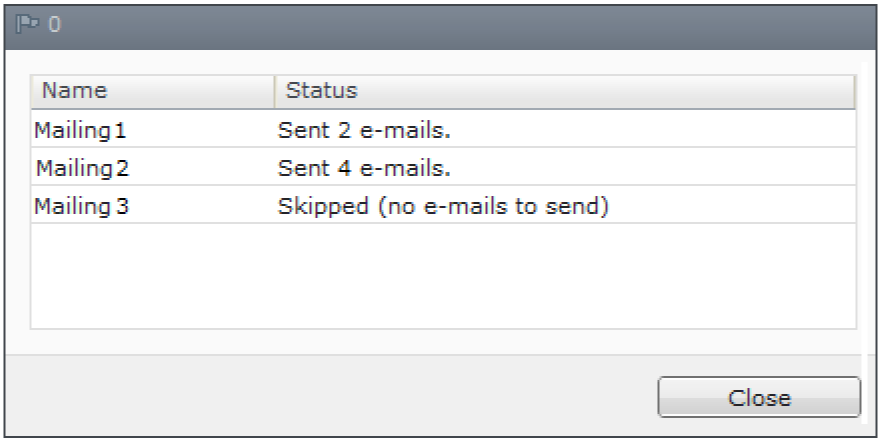



4. Specify **Advanced settings**:
   - **Maximum number of e-mails to send (per Mailing)**—enter the number of Contacts you want to send the Mailing to (`0` indicates unlimited).
   - **Only send e-mail to Contacts with all required Merge Field data**—select this check box if you want the e-mail to be sent only if all Merge Fields can be resolved. For example, if you specify a Merge Field "First Name" and the Contact has not provided a first name the e-mail will not be sent to this Contact when you select this check box.
   - **Send in batches**—fill in the **Batch size**, that is, the number of e-mails to send in one go. If you are not sure about this number, consult your system administrator to see how many e-mails your mail server can process at any one time. Select the **Time between each batch**. You can specify an interval in minutes, hours or days. For example, if you fill in 2 day(s) Outbound E-mail sends a batch of e-mails every other day starting from the date and time specified in the **Prepare the e-mails now, but send them later** field.

Note: Use the **Send in batches** settings to minimize the system load when you are sending large volumes of e-mails and you do not need to send them immediately. For example, sending a thousand e-mails at 4 AM every Sunday morning.

5. Click **Send all** to send the Mailings in the E-mail Campaign, then click **Yes** to confirm.+
6. When you click **Send all** the Mailings are sent out sequentially. Outbound E-mail indicates the **Status** of each Mailing:

- **Sending <number> e-mails**—indicates the number of e-mails currently being sent
- **Skipped (Triggered Mailing)**—for Triggered Mailings as these cannot be sent explicitly
- **Skipped (No e-mails to send)**—there were no e-mails to send as part of the Mailing
- **Sent**—the Mailing was sent successfully
- **Aborted**—the sending of the Mailing was cancelled
- **Failed**—the sending of the Mailing was unsuccessful




Note: When you click **Cancel**, Outbound E-mail completes the current action before aborting.

7. Click **Close**.

## 19.7.6 Sending a Mailing

When you have created and tested your Mailing, you can send the Mailing. You can send your Mailing in batches to prevent your mail server from overloading, or to make sure that Outbound E-mail sends e-mails only at a certain time of day.

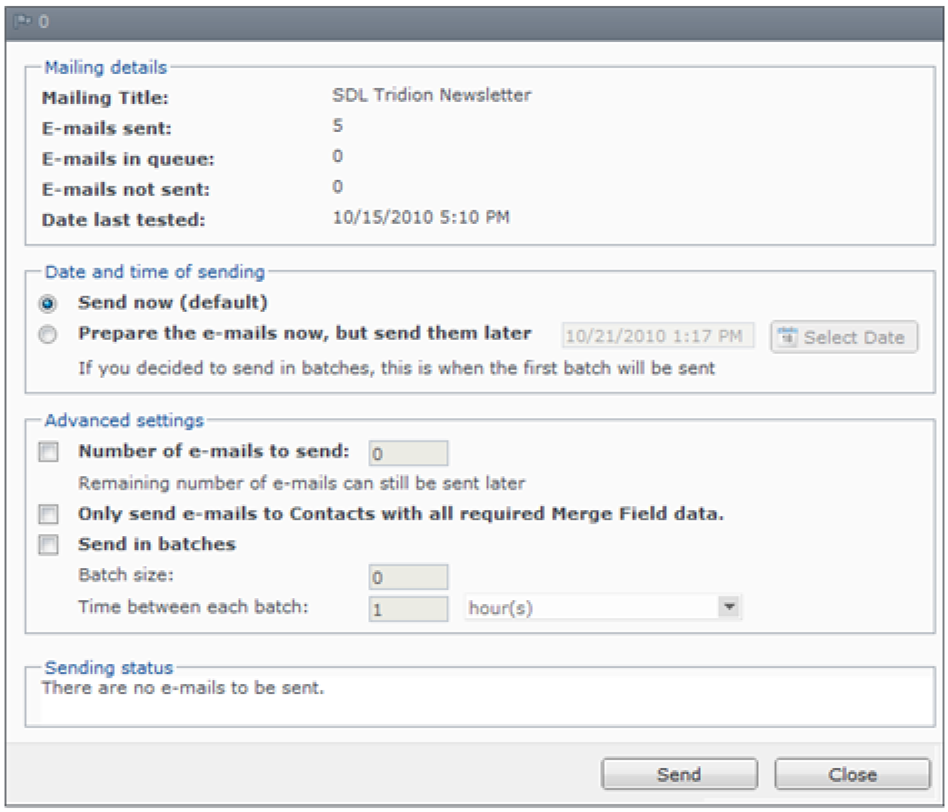
### Requirements

- To send a Mailing, you need Mailing Execution rights and Read permissions for the Outbound E-mail Folder.
- You must have tested the Mailing—Outbound E-mail renders the content of a Mailing when you test it and not when you send it, therefore when you send the Mailing it uses the rendered content the last time the Mailing was tested.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Outbound E-mail** node.

3. Select the Outbound E-mail Folder in which your Mailings are stored and in the list view select the Mailing you want to send and click the **Send Mailing** icon in the toolbar.
4. Specify **Date and time of sending** settings:
   - Select **Send now**.
   - Select **Prepare the e-mails now, but send them later** and click the Calendar icon to select the date and time at which you want Outbound E-mail to start sending e-mails. When you select this option, Outbound E-mail fixes the list of Contacts in the Mailings, though Contact details and personalized fields are resolved at the moment of sending therefore any changes will be reflected in the sent e-mail.




5. Specify **Advanced settings**:
   - **Number of e-mails to send**—enter the number of Contacts you want to send the Mailing to. The window displays the number of Contacts who have not yet received this Mailing.
   - **Only send e-mail to Contacts with all required Merge Field data**—select this check box if you want the e-mail to be sent only if all Merge Fields can be resolved. For example, if you specify a Merge Field "First Name" and the Contact has not provided a first name the e-mail will not be sent to this Contact when you select this check box.
   - **Send in batches**—specify when you want Contacts to receive E-mails, for example, you can send Mailings at a specific time such as 02.00 AM and send them in batches of 10,000 e-mails per day.

- **Batch size**—set a batch size in relation to the number of e-mails in the Mailing. If you are not sure about what batch size to use, consult your system administrator to see how many e-mails your mail server can process at any one time.

  Important:Setting a batch size that is too small in relation to the overall number of e-mails degrades performance significantly. For example, if you send 1000 e-mails and you send them with a batch size of 10, you are actually queuing 100 batches each containing 10 e-mails and it is the queuing process rather than the sending which affects performance (queuing 10 e-mails or a 1000 e-mails takes roughly the same amount of time). Therefore, sending a Mailing in batches of 100 batches takes 100 times longer than sending 1 batch.
- **Time between each batch**—specify an interval in minutes, hours or days. For example, if you fill in 2 day(s) Outbound E-mail sends a batch of e-mails every other day starting from the date and time specified in the **Prepare the e-mails now, but send them later** field.

6. Click **Send** to activate the Mailing process.

### Result

For each Contact in the Distribution List(s) associated with this Mailing, Outbound E-mail resolves the Merge Fields in the e-mail message. Outbound E-mail also excludes Components from the e-mail message if the Contact is not in the Target Group(s) specified for that Component. It then sends the resulting e-mail message to the e-mail address of that Contact.

Contacts are filtered out from the Mailing depending on the **E-mail error status**, **Subscription Status** and **Use maximum E-mails limit** settings.

## 19.7.7 Triggering a Mailing

A triggered Mailing allows you to set up a mailing to send e-mails in response to a specific event.

When you send a regular Mailing, the e-mail is sent to a list of Contacts contained in the Distribution List(s) you specified in the Mailing. At the moment the Mailing is sent, or scheduled to be sent, the list of Contacts is fixed. A triggered Mailing allows you to set up a mailing to send e-mails in response to a specific event. The event results in a Contact being added to the Distribution List specified in the triggered Mailing, and this acts as the trigger to send a Mailing.

While a triggered Mailing is active, Outbound E-mail regularly checks the Distribution Lists specified in the triggered Mailing for members who have not yet received the Mailing and sends the e-mail message to these members. Outbound E-mail therefore sends e-mails as and when Contacts are added to the Distribution List. A triggered Mailing can remain active indefinitely, or you can schedule the Mailing to send e-mails during a specified period.

The following are examples of situations when you would use triggered Mailings:

- **Contact registration**—a typical example of a triggered Mailing is a welcome e-mail. When a Contact registers on your Web site, they receive a welcome e-mail confirming their registration.
- **Clicking a link**—if a registered user receives a regular Mailing listing a new line of products with links to the various product pages, clicking one of these links triggers the sending out of a special e-mail for that product offering a discount.

These examples require implementation on the Presentation Server (Web site), or in the templates used in your Mailings using the available Content Delivery APIs for Outbound E-mail.

## Creating a Triggered Mailing

A triggered Mailing allows you to set up a mailing to send e-mails in response to a specific event. The event results in a Contact being added to the Distribution List specified in the triggered Mailing, and this acts as the trigger to send a Mailing.

### Requirements

- To set up a Triggered Mailing, you need Mailing Execution and Mailing Management rights and Write permissions for the Outbound E-mail Folder.
- You must have created and tested a Mailing.
- Contacts are typically added to a Dynamic Distribution List when the Contact's Keywords are updated—the mechanism that performs this update (outside of the Content Management System) requires implementation (programming).

### Context

The following example describes how to set up a Triggered Mailing for sending Welcome e-mails when someone registers on your Web site:

- Identify a Contact detail, or create a new Keyword, whose value you want to use as a filter for a Dynamic Distribution List—for example, create a new Keyword **Classic Car Fair**.
- Create an empty dynamic Distribution List that uses this Contact Detail or Keyword—for example, create a new Dynamic Distribution List **Classic Car Fair** which filters Contacts on the Keyword **Classic Car Fair**
- Create a Mailing and specify the Dynamic Distribution List **Classic Car Fair**
- Test the Mailing.
- Select the Triggered Mailing check box and specify a start date.
- Set up a Subscription Page on your Web site for customers to subscribe to **Classic Car Fair** Mailing. When the customer subscribes, the Contact's Keywords are updated resulting in the Contact being added to the Distribution List used in the triggered Mailing.

### Steps to execute

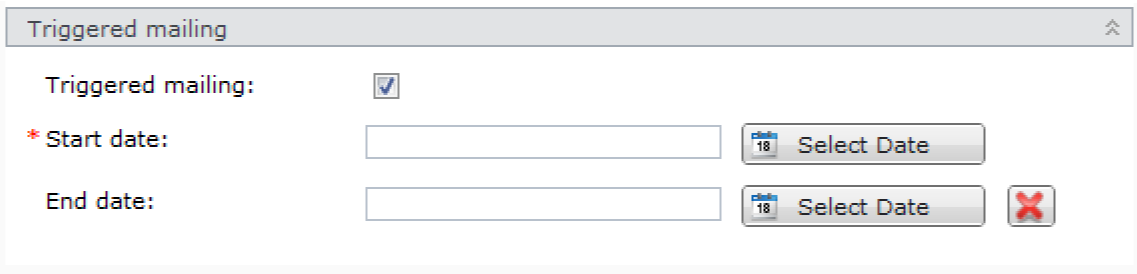
1. Open the Content Manager Explorer.

2. Navigate to the **Publication** > **Outbound E-mail** node.

3. Select the Outbound E-mail Folder in which your Mailings are stored. In the list view, select a tested Mailing you want to set up as a triggered Mailing and choose **Open** from the context menu.

   Note: A tested Mailing is indicated with a green check mark on the Mailing icon.

4. To turn the Mailing into a Triggered Mailing, at the bottom of the **General** tab select the**Triggered Mailing** check box:




5. Specify the **Start date** and optionally an end date (to send the e-mail during a specified period, or indefinitely).
   - Click the **Calendar** button next to **Start date** to select the date and time on which you want the trigger to be activated (mandatory).
   - If you want the trigger to expire at some point in time, click the **Calendar** button next to **End date** and select the date and time on which you want **Outbound E-mail** to stop sending e-mails.
   - To leave the trigger activated indefinitely, for example for a welcome e-mail, leave the **End Date** empty (click the **Clear End Date** button top empty the field).

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

## Result

From the time indicated by Start Date, Outbound E-mail sends an e-mail message to any Contact who sets off the trigger. The trigger becomes inactive again at the time indicated by End Date (if any).

Important:After you have turned a Mailing into a Triggered Mailing, you can no longer test it. To retest your mailing, you must first deactivate the trigger by clearing the Triggered Mailing check box, test it, and then activate the trigger again.

## Next steps

To trigger a Mailing being sent in response to a specific event taking place requires you to implement an event on your Web site.

### 19.7.8 Clearing the e-mail queue for a Mailing

After you have scheduled a Mailing, Outbound E-mail puts e-mail messages in the e-mail queue and waits for the scheduled time to arrive. If you find that you want to undo the scheduled Mailing before any e-mails have been sent, you can do so easily by clearing the queue.

#### Requirements

To clear the e-mail queue for a Mailing, you need Mailing Execution rights and Read permissions for the Outbound E-mail Folder.

#### Context

Note: Even if you are not scheduling but have specified a large volume of e-mails to send, the mail queue can also become full in which case you may also want to clear the e-mail queue.

#### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Outbound E-mail** node.
3. Select the Outbound E-mail Folder in which your Mailings are stored. In the list view, select the Mailing and click the **Clear Queue** icon in the toolbar.
4. Click **Yes** to confirm removal.

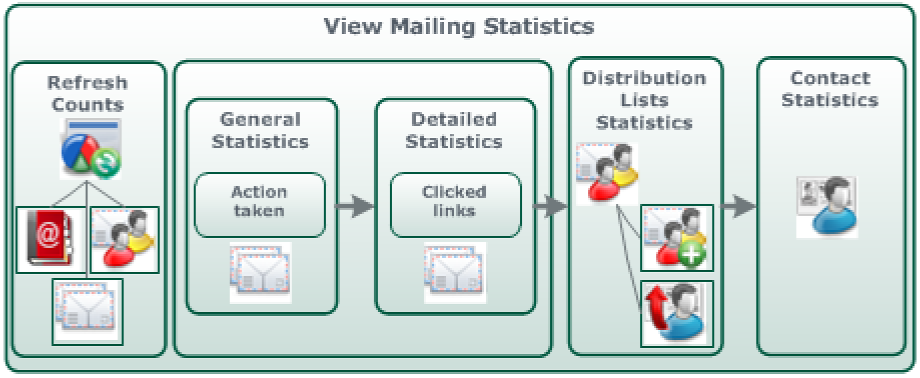
#### Result

Outbound E-mail clears the queue for this Mailing

## 19.8 Viewing Mailing statistics

Once you have sent out a Mailing, you may want to monitor the response of your Contacts to the Mailing. Outbound E-mail makes it possible for you to zoom in from a general overview of Mailing response, down to seeing what a Mailing looked like to one individual Contact.

You can use Mailing statistics to form a clearer impression of who is interested in your e-mail and what kind of content interests them. You can use this information to create Distribution Lists, allowing you to send a more targeted Mailing.




Outbound E-mail makes the following detail levels available:

- **Statistics** shows you how the various Mailing results, such as whether the e-mail was opened and whether it arrived or not, are distributed and what links were clicked in the e-mail. You can also see result percentages per Distribution List.
- **Distribution List** statistics details show you which Contacts in a specific Distribution List shared the same Mailing result. For example, you can see which members of the Male Adolescents Distribution List opened their Mailing. You can turn such a selection into a new Distribution List, or export the Contacts to CSV file.
- **Contact details** show you which Mailings were sent to a specific Contact and what action they took.
- **Mailing details** show you what a Mailing looked like to a specific Contact; that is, you see the specific e-mail message that arrived in this one Contact's e-mail inbox.

Number counts indicating the number of Contacts contained in Distribution Lists and Address Books are not calculated automatically. To view and update the number counts, you need to use the **Refresh statistics** functionality.

## 19.8.1 Mailing statistics

When a Mailing is sent, a snapshot is taken of the Mailing that provides you with statistics of the Distribution Lists in the Mailing and Contacts in the Distribution Lists who are the recipients of the Mailing. A snapshot is taken of all Mailings regardless of whether they are sent manually, scheduled or triggered.

Mailing statistics show all Distribution Lists, and Contacts in the Distribution Lists, that were part of the Mailing when it was queued. The Distribution Lists are shown in order of their priority in the **Mailing Status** dialog (and also on the **Mailing** edit dialog). Contacts that are a part of several Distribution Lists in the Mailing are counted in the statistics for the Distribution List with the highest priority.

Mailing statistics *are* updated when:

- An associated Distribution List or Contact is deleted: you can see the Contacts in the lists, but you cannot view the details.
- The Mailing is sent again and the priority of the Distribution Lists that are still related to the Mailing have changed: the statistics are updated to reflect the new order.
- The associated Mailing is deleted: the snapshots are also deleted.

Mailing statistics *are not* updated when:

- A Contact is moved from one Address Book to another: the statistics gathered for that Contact remain unaffected.
- Distribution List membership changes: if, for example, a Dynamic Distribution List is modified after the statistics have been gathered, these changes are not reflected in the statistics.
- The Mailing is sent again and Distribution Lists have been removed from the Mailing: the Distribution Lists remain in the snapshot, therefore you can view all Distribution Lists that have ever been part of the Mailing while it was being sent, with the priority they had when they were part of the Mailing.

## 19.8.2 Viewing Mailing statistics

Mailing statistics provide information about Mailing response, for example which percentage of Contacts opened the e-mail or not and whether they took action on the e-mail, for example by clicking links.

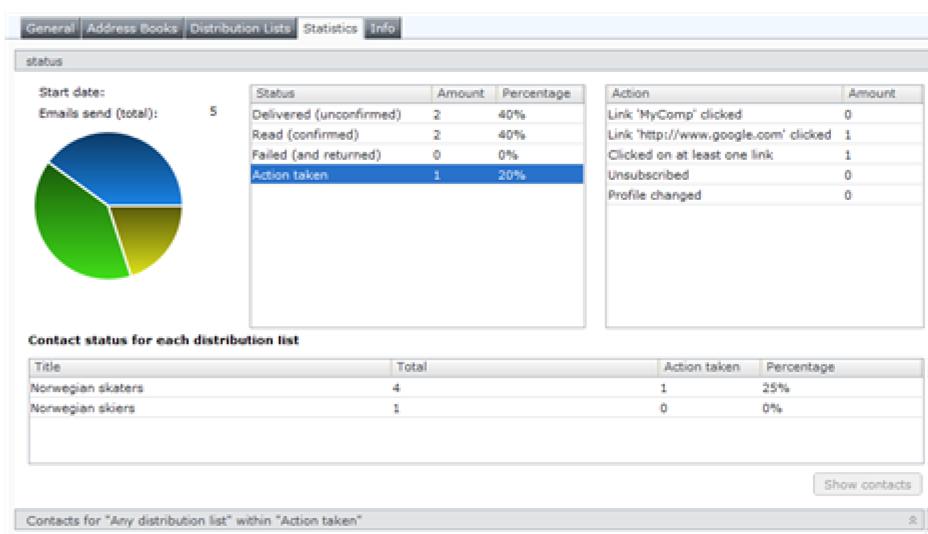
### Requirements

To view Mailing statistics, you need Mailing Execution or Mailing Management rights and Read permissions for the Outbound E-mail Folder.

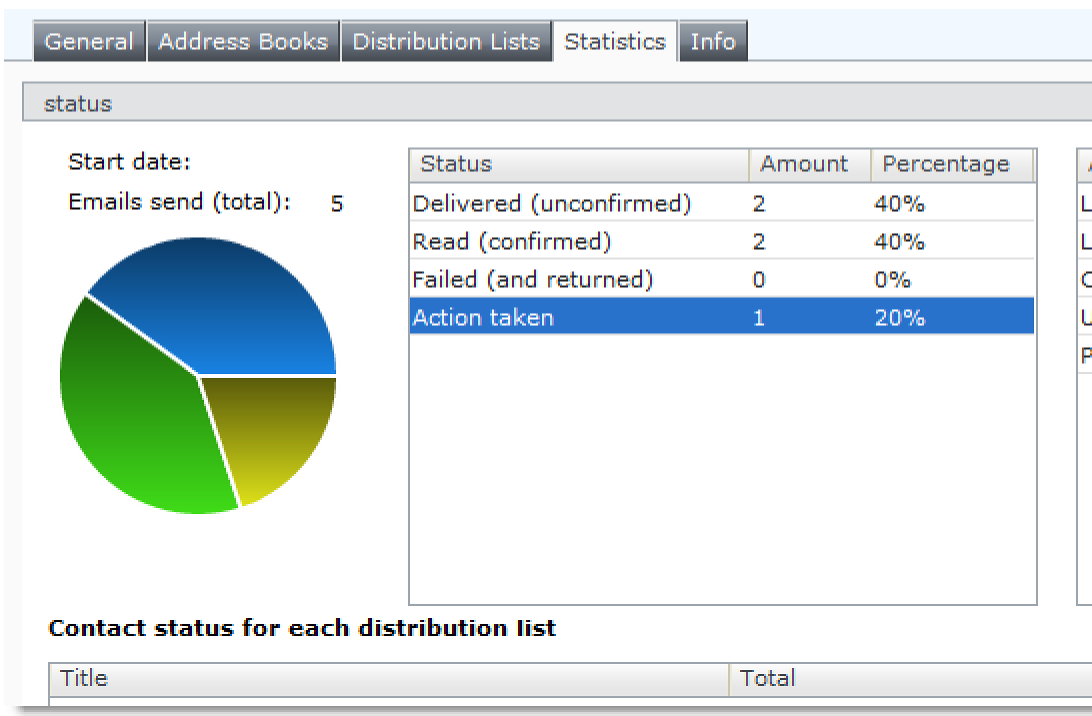
### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to the **Publication** > **Outbound E-mail** node.
3. Select the Folder in which your Mailings are stored.
4. In the list view, select the Mailing for which you want to examine statistics and click the **Explore Mailing Status** icon  in the toolbar.

   The Mailing opens on the **Statistics** tab:

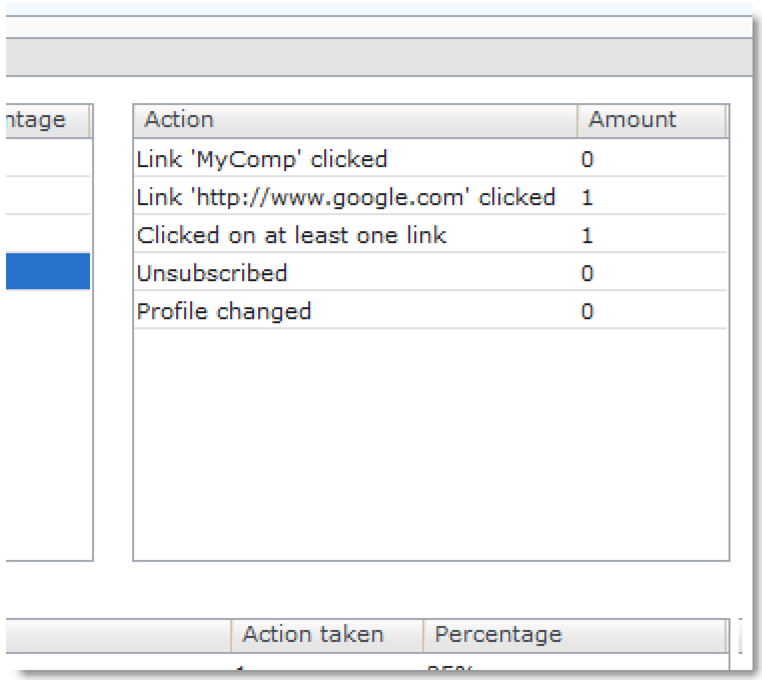


5. The **Statistics** tab displays the following information:
   - **Pie chart**—graphically displays the status distribution of a Mailing (hovering over the pie chart shows you the status details in a tooltip):
     - Blue indicates Delivered
     - Green indicates Read
     - Yellow indicates Action taken
     - Red indicates Failed
   - **Status**—view the response to the Mailing in percentages. The **Amount** column shows for how many Contacts in the Mailing the status applies. A Mailing can have the following statuses:
     - **Delivered (unconfirmed)**—shows how many of the total number of e-mails have been sent but not yet opened by their recipients.
     - **Read (confirmed)**—shows how many of the e-mails that were delivered were opened by its recipients, with none of the links clicked yet.
     - **Failed (and returned)**—shows how many of the e-mails could not be delivered.
     - **Action taken**—shows how many recipients of the e-mails clicked a link in the e-mail message.




   - **Action**—view a list of clickable links in the e-mail message and how many people clicked on these links:
     - **Clicked on at least one link**—shows how many recipients clicked a trackable link in the e-mail
     - **<name of link>**—shows each individual trackable link in the e-mail and how many recipients clicked the link
     - **Unsubscribed**—shows how many recipients clicked the unsubscribe link in the e-mail

- **Profile changed**—shows how many recipients clicked the link in the e-mail to change his or her profile




- **Contact status for each Distribution List**—the bottom section displays a list of Distribution Lists in order of priority (the order in which they were sent) and statistics on the Contacts in the lists.

  When you select a response type in **Status overview** or **Actions taken**, the **Contact status for each Distribution List** displays all Distribution Lists for this Mailing and provides statistics on the number of Contacts for whom the selected response type applies and the overall percentage of Contacts in a Distribution List who responded as such. For more information, refer to Viewing Distribution List statistics (see page 315).

  Note: Note that the percentages in this table do not add up to 100, as they are unrelated to each other.

### Result

You have examined the Mailing response of a Mailing to see how the Mailing results are distributed.

## 19.8.3 Viewing Distribution List statistics

To learn more about who responded to your Mailing and in what way, you can select a type of Mailing result and then examine the members of each Distribution List within that Mailing result.

## Requirements

To view Mailing statistics, you need Mailing Execution or Mailing Management rights and Read permissions for the Outbound E-mail Folder.

## Context

You can also create a new Distribution List or update an existing one with the Contacts in the Mailing result, For example, if you are examining all the members of a Distribution List who read your Mailing, it can be worthwhile to isolate them as a responsive audience, or to save the Contacts to an export CSV file.

## Steps to execute

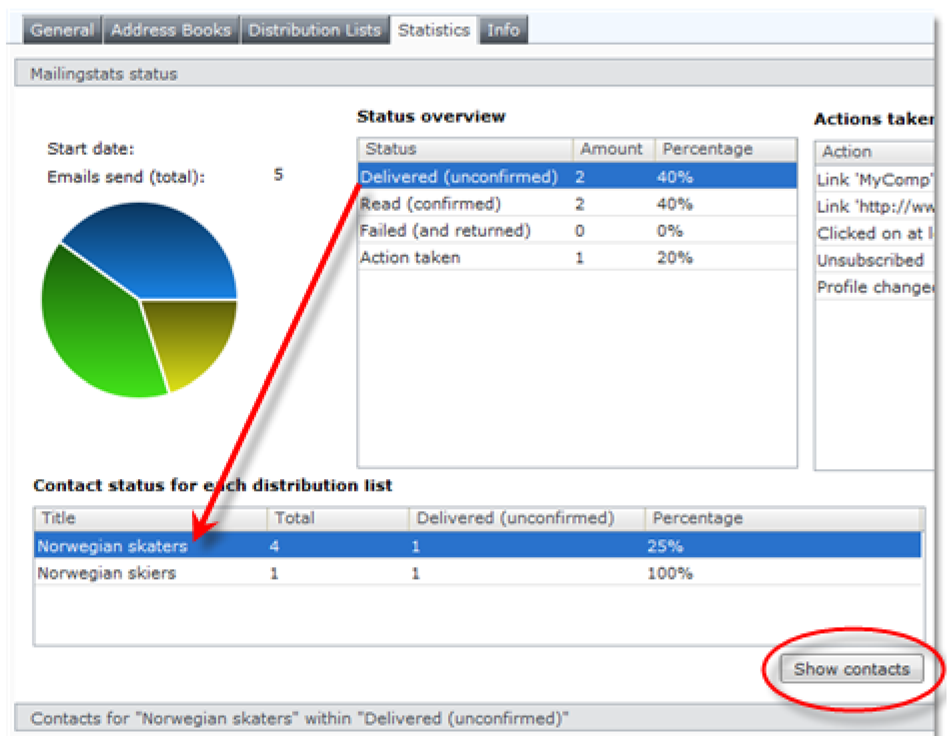
1. In the **Publication** > **Outbound E-mail** node, navigate to the Folder where your Mailings are stored, select a Mailing and click the **Explore Mailing Status** icon  in the toolbar.

   The Mailing opens on the **Statistics** tab.

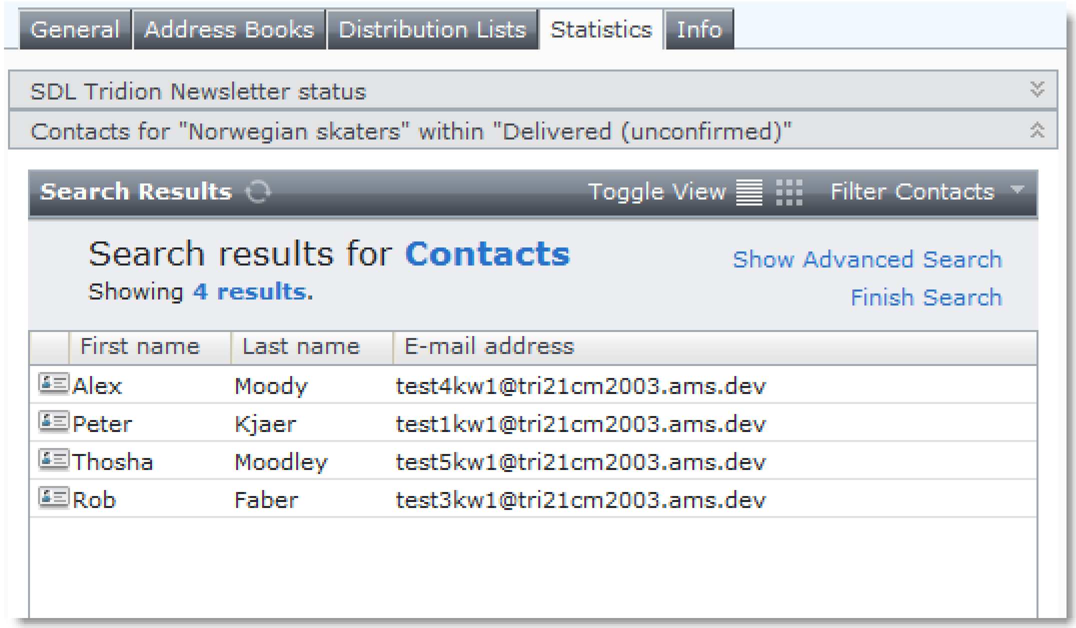
2. To see the statistics for Distribution List members:

   a. Select a response type in the **Status overview** or **Actions taken**.

   b. Select a Distribution List and click **Show Contacts**.




   c. Outbound E-mail opens a window for the selected Distribution List detailing the members of the Distribution List to whom the type of Mailing result applies:




d. Click **Filter Contacts** to filter the displayed list—see Searching Contacts (see page 241)

Note: Outbound E-mail opens a new window for each selected Distribution List, showing those members of the Distribution List to whom the type of Mailing result applies. For example, if you select **Read (confirmed)** and a Distribution List called Male Adolescents, the Details button shows you which male adolescents read the Mailing.

### Result

You have examined who responded to your Mailing and in what way.

### Next steps

You can turn this set of Contacts into a Distribution List, or export this set of Contacts to a CSV file.

## Creating Distribution Lists from statistics

You can create Static or Dynamic Distribution Lists from statistics.

### Requirements

- To create a Distribution List from statistics, you need Distribution List Management rights and Write permissions for the destination Outbound E-mail Folder.
- To view Mailing statistics, you need Mailing Execution or Mailing Management rights and Read permissions for the Outbound E-mail Folder.

## Context

Distribution Lists created from statistics differ from other Distribution Lists in that they are based on Contact response criteria rather than Contact details criteria. For example, you will frequently want to create Distribution Lists based on whether respondents have read an e-mail or whether they have clicked a specific link in the e-mail.

You can create a Static or Dynamic Distribution List consisting of Contacts **to whom a selected Mailing status applies** which:

- includes all recipients in all Distribution Lists in a Mailing
- includes all recipients in a single Distribution List in a Mailing
- includes a manual selection (static) or filtered selection (dynamic) of the recipients in a single Distribution List in a Mailing

## Steps to execute

1. In the **Publication** > **Outbound E-mail** node, navigate to the Folder where your Mailings are stored, select a Mailing and click the **Explore Mailing Status** icon in the toolbar.

   The Mailing opens on the **Statistics** tab.

2. Select a Mailing response status, for example:
   - Select **Read (confirmed)** to add recipients who have opened the e-mail but not yet clicked the links to a Distribution List.
   - Select **Action taken** to add recipients who have opened the e-mail and clicked one or more of the links to a Distribution List.
   - Select a specific link clicked In the **Details** tab to add recipients who have opened the e-mail and clicked this link to a Distribution List.

3. When you have selected a Mailing response status, do one of the following:
   - Click **Add Contacts to Distribution List** to add all the recipients to whom the selected Mailing status applies, in all Distribution Lists, to a Distribution List.
   - Select one Distribution List and click **View Contacts** to further refine the list of recipients who you want to add to a Distribution List (and to whom the selected Mailing status applies)—see step 4.

   Note: For detailed information on creating Distribution Lists, see Managing Distribution Lists (see page 268).

4. When you select a Distribution List and click **View Contacts**, the **Distribution List details** shows the Contacts in this Distribution List to whom the selected Mailing status applies:
   - Click the **Add Contacts to Distribution List** in the toolbar to create a Distribution List containing all the Contacts in the selected Distribution List (to whom a Mailing status applies).

- Define search criteria and click **Search**, then click the **Add Contacts to Distribution List** to create a Distribution List containing all the Contacts that meet the search criteria to whom a Mailing status applies.

  Note: For more information, see Searching Contacts (see page 241).

### Result

Outbound E-mail creates a Static or Dynamic Distribution List containing Contacts to whom a selected Mailing status applies, depending on your choices.

When you open the Distribution List, the **General** tab indicates that the Distribution List was created from statistics and on what Mailing and Mailing status it was based.

### Next steps

You can edit the Distribution List to set **Priority**. For Dynamic Distribution Lists created from statistics, you can also define additional criteria. For example, to filter Contacts who have read an e-mail and who have indicated an interest in Sports cars (as defined in a Contact's Keywords).

## Exporting Contacts from statistics

You can export Contacts from statistics to a CSV file.

### Requirements

- To export Contacts from statistics, you need Mailing Execution or Mailing Management rights and Read permissions for the Outbound E-mail Folder.

### Context

You can export Contacts, to whom a selected Mailing status applies, and include:

- all recipients in all Distribution Lists in the Mailing
- all recipients, or a selection of recipients, in a single Distribution List in the Mailing

### Steps to execute

1. In the **Publication** > **Outbound E-mail** node, navigate to the Folder where your Mailings are stored, select a Mailing and click the **Explore Mailing Status** icon in the toolbar.

   The Mailing opens on the **Statistics** tab.

2. Select a Mailing response status, for example:

- Select **Read (confirmed)** to export recipients who have opened the e-mail but not yet clicked the links.
- Select **Action taken** to export recipients who have opened the e-mail and clicked one or more of the links.
- Select a specific link clicked in the **Details** tab to export recipients who have opened the e-mail and clicked this link.

3. When you have selected a Mailing response status, do one of the following:
   - Click **Export Contacts** in the toolbar to export all the recipients to whom the selected Mailing status applies (for all Distribution Lists in the Mailing).
   - Select one Distribution List and click **View Contacts** to further refine the list of recipients who you want to export (and to whom the selected Mailing status applies)—see step 4.

4. When you select a Distribution List and click **View Contacts**, the **Distribution List details** shows the Contacts in this Distribution List to whom the selected Mailing status applies:

   a. Define search criteria and click **Search**—for more information, see Searching Contacts (see page 241)

   b. Click the **Export Contacts**—for more information, see Exporting Contacts (see page 259).

### Result

The export file is saved to the location on your file system specified. Outbound E-mail creates columns and rows of data in the export file. The columns have the same names as the corresponding Contact Details, and each row in the export file stores data for a Contact.

## 19.8.4 Viewing Contact details and Mailing details

You can go through the **Mailing Status** to see what a Mailing looked like to a specific Contact (personalization).

### Requirements

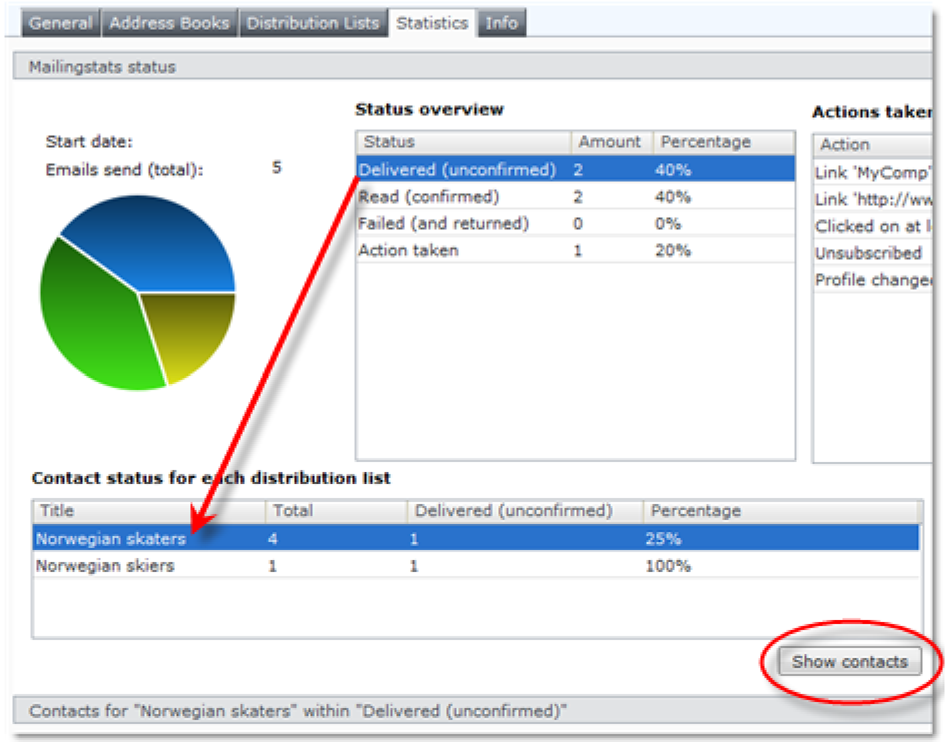
To view Mailing statistics, you need Mailing Execution or Mailing Management rights and Read permissions for the Outbound E-mail Folder.

### Steps to execute

1. In the **Publication** > **Outbound E-mail** node, navigate to the Folder where your Mailings are stored, select a Mailing and click the **Explore Mailing Status** icon in the toolbar.

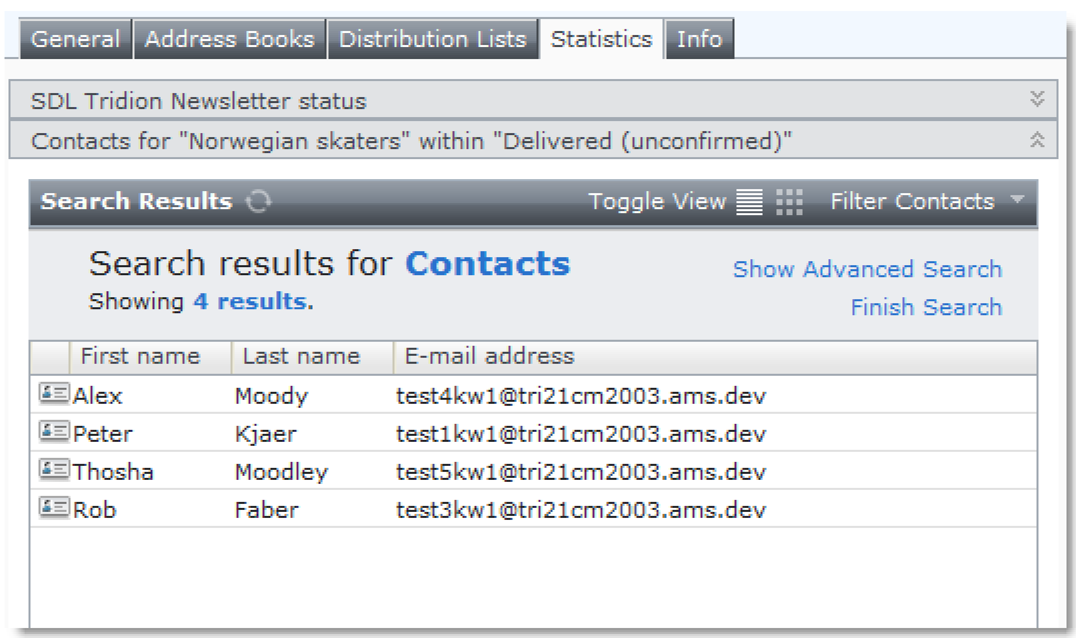
   The Mailing opens on the **Statistics** tab.

2. Select a response type, for example **Action taken** or **Read (confirmed)**:

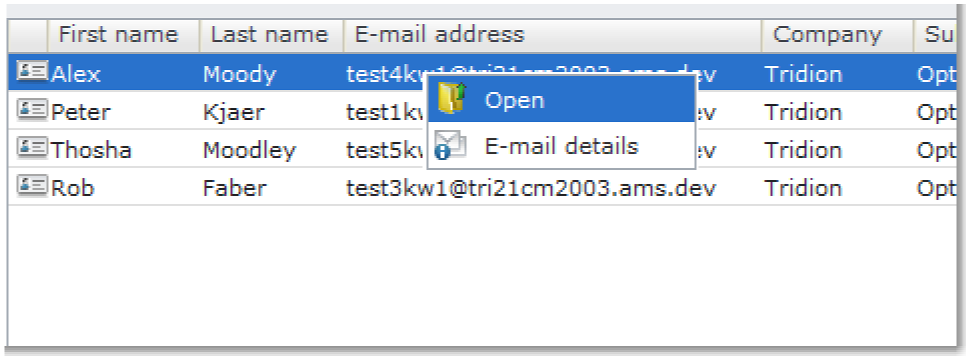



3. Select a Distribution List.

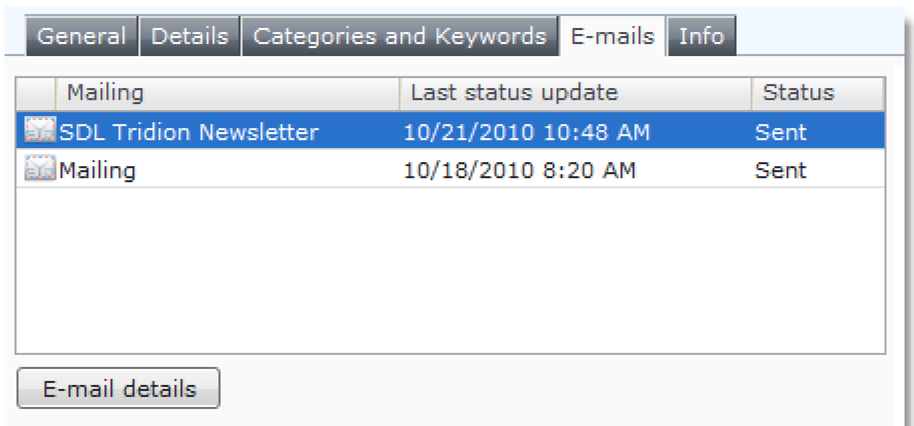
4. Click **Show Contacts** to view the members of the Distribution List to whom the type of Mailing result applies:




5. Select a Contact and choose **Open** in the context menu to see which Mailings are associated with a specific Contact:

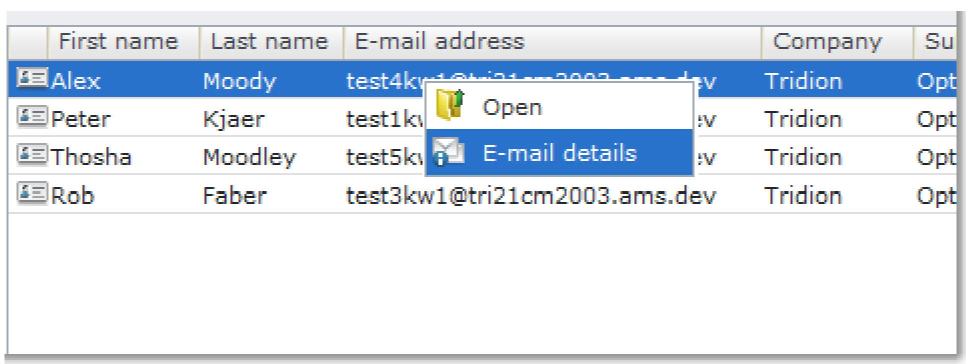



Contact details open:



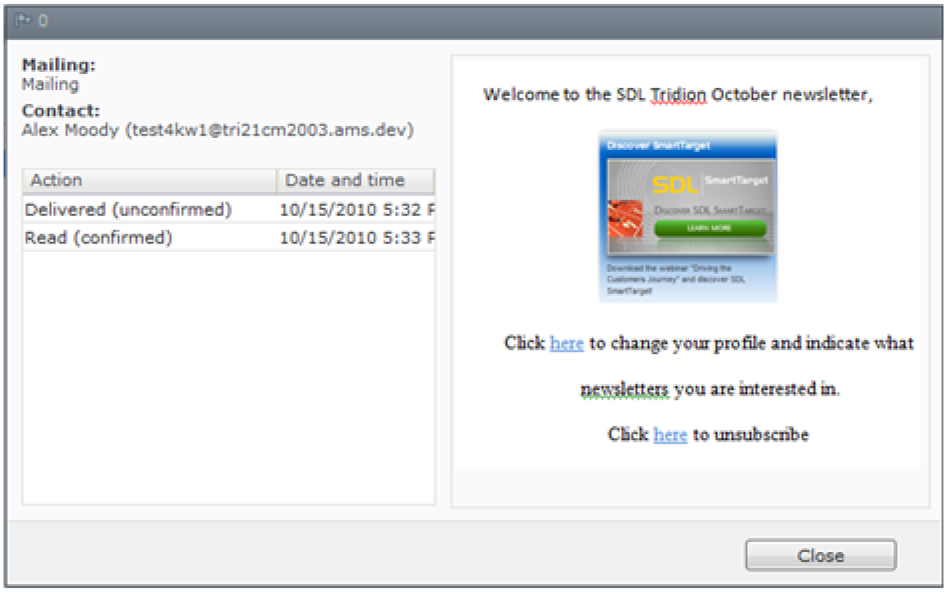

Select a Mailing and click **E-mail details** to view the Mailing as it appeared to this Contact (mailing history).

6. Select a Contact and click **E-mail details** in the context menu to view the Mailing details:




Mailing details open:

- The left-hand side of the window shows the Mailing and Contact details and the actions taken on the Mailing by the Contact and when (date and time).
- The right-hand side of the window displays the e-mail that was sent to this Contact, including Contact Details of this specific Contact where Merge Fields are used in the e-mail.




### Result

You examined what a Mailing looked like to a specific Contact and viewed what action was taken by that Contact.

## 19.8.5 Refreshing statistics

For performance reasons, the number counts for Distribution Lists, Address Books, and Mailing statistics are not calculated automatically. To view the number counts you need to use the **Refresh statistics** functionality.

### Context

Statistics are displayed in several places in the Content Manager Explorer for Outbound E-mail to indicate the number of Contacts contained in Distribution Lists and Address Books and to display various statistics concerning a Mailing.

When you refresh the number counts, the statistics are updated and cached for fast retrieval. The number counts you see in the Content Manager Explorer therefore date from the last time the counts were refreshed, as indicated by the **Calculated** column in the **List View**.

Note: Performing a **Refresh statistics** is not needed to see the latest Mailing Status.

### Steps to execute

1. Open the Content Manager Explorer.
2. Navigate to:
   - the **Publication** > **Outbound E-mail** node and select the Folder in which your Mailings or Distribution Lists are stored.

- the **Publication** > **Audience Manager** > **Address Books** node.

3. Select a Mailing, Distribution List, or Address Book and click **Refresh statistics** icon in the toolbar or choose **Refresh statistics** from the context menu:

   A progress window informs you of the status of the update.

## Result

The statistics for the selected Outbound E-mail items are updated:

- For Distribution Lists and Address Books, the **Total Contacts** are recalculated
- For Mailings, the **Delivered**, **Failed**, **Read**, **Action taken** and **Sent** statistics are recalculated

# Chapter 20 User Generated Content

User Generated Content (UGC) allows visitors to your Web site to rate content and read and leave comments. Content Manager users can examine ratings and comments, and authorized users can disallow rating and commenting for specific Components or Pages, and edit, remove and moderate comments.

Note: On the published Web page, a Component or Page only shows ratings and comments if you published the item using a template that adds UGC functionality during publishing.

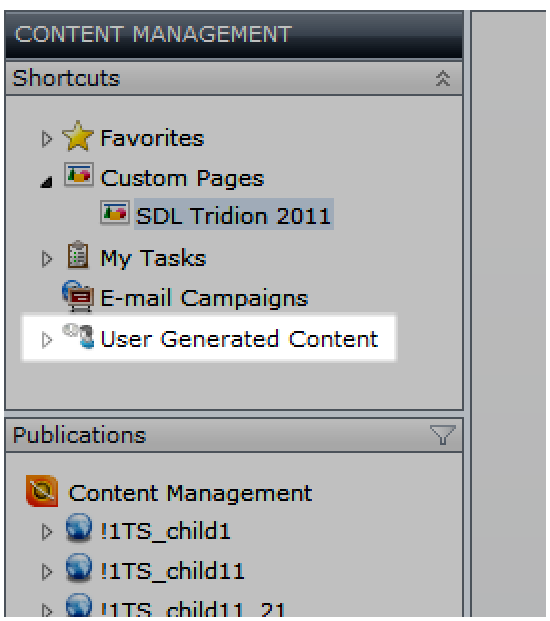
## 20.1 Where to find comments and ratings

Content Manager Explorer can show you comments and ratings in the entire Content Manager, for a Publication, for a Component, for a Page, or for a Contact.

You can see the comments and ratings that visitors have submitted in the following ways:

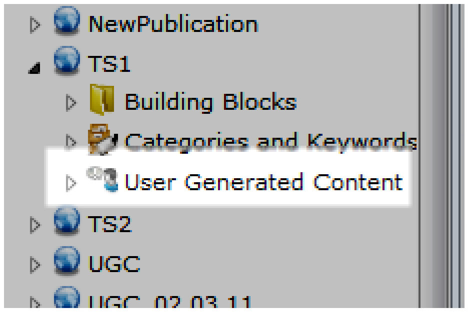
**All comments and ratings**

The **Shortcuts** area of Content Manager Explorer contains a **User Generated Content** node that lets you view and filter all comments and ratings submitted for any Publications that you have access to. For more information, refer to Viewing and filtering all comments and ratings in Content Manager (see page 328)



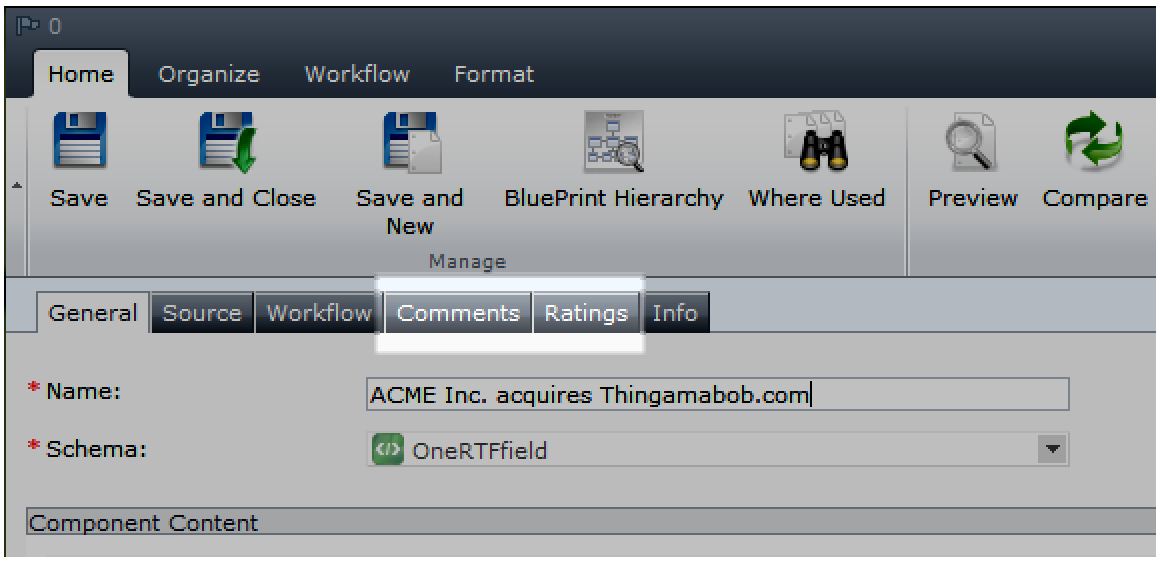

**Comments and ratings for a specific Publication**

Each Publication has a root-level **User Generated Content** node that lets you view and filter all comments and ratings submitted for any content item in that Publication. For more information, refer to Viewing and filtering all comments and ratings in a specific Publication (see page 329)




### Comments and ratings for a specific Component

Every Component has a **Comments** tab and a **Ratings** tab in which you can see detailed comments and ratings, respectively.

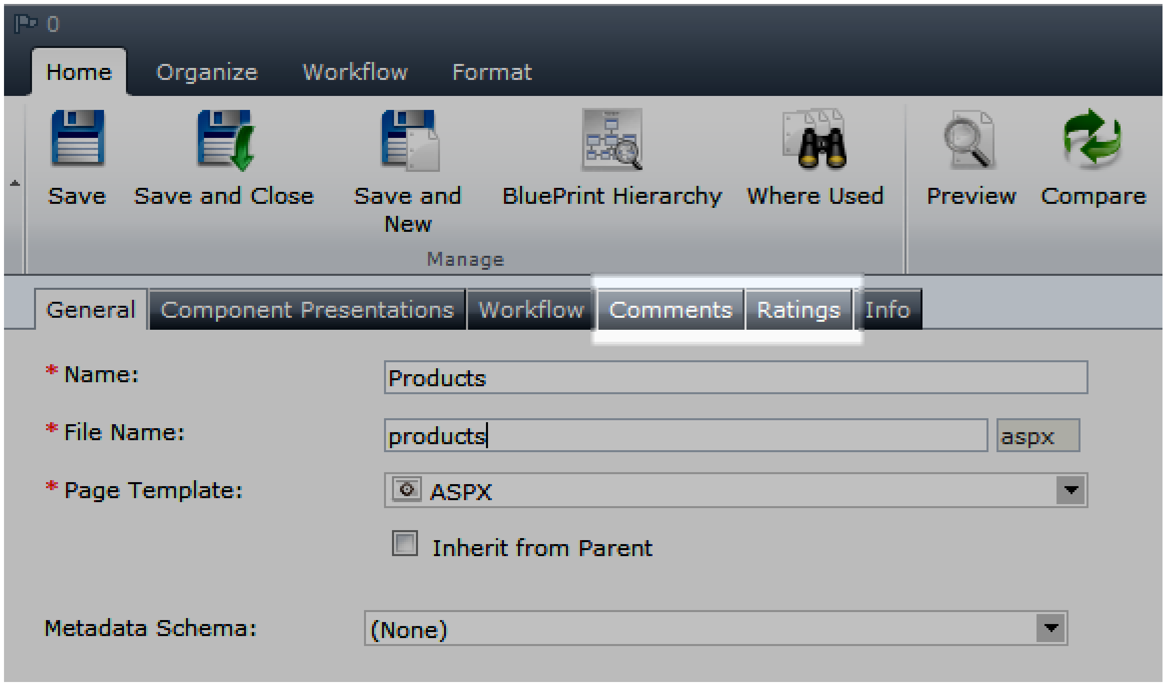



For more information about the **Comments** tab, refer to Comments tab for a Component or Page (see page 334).

For more information about the **Ratings** tab, refer to Ratings tab for a Component or Page (see page 334).

### Comments and ratings for a specific Page

Every Page has a **Comments** tab and a **Ratings** tab in which you can see detailed comments and ratings, respectively.




For more information about the **Comments** tab, refer to Comments tab for a Component or Page (see page 334).

For more information about the **Ratings** tab, refer to Ratings tab for a Component or Page (see page 334).

### Comments and ratings from a specific Contact

If your implementation of UGC identifies visitors as Audience Manager Contacts in SDL Tridion, you can see the comments and ratings submitted by a Contact by opening that Contact from an Address Book in the **Audience Manager** node of a Publication, and selecting the **Comments** or **Ratings** tab, respectively.


- For more information about the **Comments** tab for a Contact, refer to Viewing and filtering comments for a Contact (see page 335).
- For more information about the **Ratings** tab for a Contact, refer to Ratings tab for a Contact (see page 337).

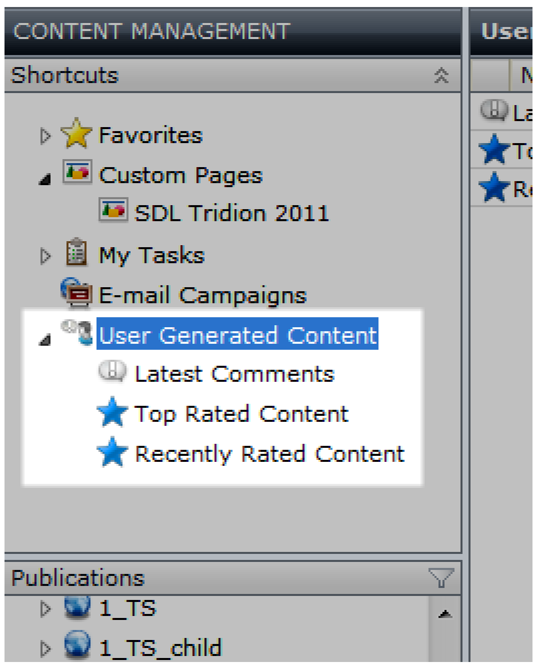
## 20.2 Viewing and filtering all comments and ratings in Content Manager

View and filter all comments and ratings in Content Manager to check for new comments and ratings, to identify comments in need of moderation, and to identify overall trends and numbers with regard to commenting and rating.

### Steps to execute

1. To examine all comments and ratings submitted for any content item anywhere in Content Manager, access the Content Manager Explorer and in the **Shortcuts** area, expand the **User Generated Content** node.

   A number of subnodes appear.

2. Now do one of the following:
   - To see comments ordered by date from newest to oldest, select **Latest Comments**. Refer to Viewing and filtering comments in the comments screen (see page 329) to learn more about the comments screen that appears.
   - To see ratings for content ordered from highest to lowest rating, select **Top Rated Content**. Refer to Viewing and filtering ratings in the ratings screen (see page 332) to learn more about the ratings screen that appears.
   - To see ratings for content ordered in reverse chronological order (latest ratings at the top), select **Recently Rated Content**. Refer to Viewing and filtering ratings in the ratings screen (see page 332) to learn more about the ratings screen that appears.

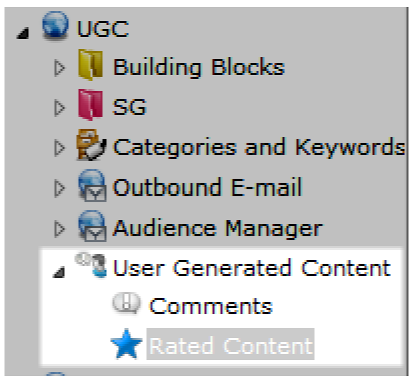
# 20.3 Viewing and filtering all comments and ratings in a specific Publication

View and filter all comments and ratings in a Publication to check for new comments and ratings, to identify comments in need of moderation, and to identify overall trends and numbers with regard to commenting and rating.

## Steps to execute

1. To examine all comments and ratings submitted for any content item in a specific Publication, access the Content Manager Explorer and in the **Publications** area, select a Publication and expand the **User Generated Content** node.

   A number of subnodes appear.

2. Now do one of the following:
   - To see comments submitted for content in this Publication, select **Comments**. Refer to Viewing and filtering comments in the comments screen (see page 329) to learn more about the comments screen that appears.
   - To see ratings submitted for content in this Publication, select **Rated Content**. Refer to Viewing and filtering ratings in the ratings screen (see page 332) to learn more about the ratings screen that appears.

# 20.4 Viewing and filtering comments in the comments screen

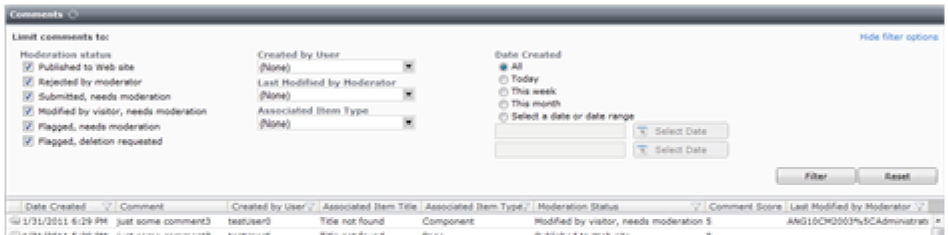
This topic explains what the comments screen looks like and what you can do to filter its contents.

## Steps to execute

1. To see a comments screen, do one of the following:

- In the **Shortcuts** area, navigate to **User Generated Content** > **Latest Comments**
- In the **Publications** area, select a Publication and navigate to **User Generated Content** > **Comments**

A number of filter options appears in the top of the content area, and the bottom of the content area shows all comments submitted today. Click the **Refresh** icon at the top at any time to see the most up-to-date list.



Each filter option has an equivalent filter control in the column headers of the results displayed below:


2. Apply any or all filters to change the comments displayed in the bottom half. The filters available to you are:

**Moderation status**

Clear any of the status values to not see items with that moderation status in the results; check a status value to see items with that moderation status. The status values are:

- **Published to Web site** indicates that the comment is currently available for viewing on the published Web page.
- **Rejected by moderator** indicates that a user has rejected the comment, removing it from the published Web page.
- **Submitted, needs moderation** indicates that the comment has been submitted by a visitor and is pending moderation. The comment is not yet available for viewing on the published Web page, and may never be.
- **Modified by visitor, needs moderation** indicates that a visitor has submitted this comment, and it has been made available for viewing on the published Web page. Now, the same visitor who submitted the comment has made changes to it and resubmitted it, and it is pending moderation. The modified comment is not yet available for viewing on the published Web page, and may never be.
- **Flagged, needs moderation** indicates that a visitor or a Content Manager user has flagged a comment for moderation that is currently available for viewing on the published Web page. The comment is now subject to moderation, the outcome of which may cause it to be removed from the published Web page.
- **Flagged, deletion requested** indicates that a visitor or a Content Manager user has flagged a comment for deletion that is currently available for viewing on the published Web page. The comment is now subject to moderation, the outcome of which may cause it to be removed from the published Web page.

**Created by User**

Select a specific user (that is, Web site visitor) to see only comments submitted by that user.

**Last modified by Moderator**

Select a specific Content Manager user to see only comments that were last modified by that moderator.

**Associated Item Type**

Select **Component** to see only comments submitted for Components, and **Page** to see only comments submitted for Pages.

**Date Created**

Select a value to specify a time frame (or no time frame) within which comments must have been submitted:

- Select **All** to see comments submitted at any time.
- Select **Today** to see comments submitted since midnight today.
- Select **This week** to see comments submitted since Monday of the current week.
- Select **This month** to see comments submitted since the 1st of the current month.
- Select **Select a date or date range** to specify a start date and an end date, and see comments submitted between those two dates, inclusive.

When you have configured all your filters, click **Filter** to see all comments that match your filter.

The bottom half of the content area shows the filtered results. If you want, click **Hide filter options** to stop displaying all the filter controls. The columns of the filtered results have the following meanings:

- **Date Created** shows when the comment was submitted.
- **Comment** shows the first few words of the comment that was submitted. Hover over this field to see more of the comment in a floating text box.
- **Created by User** shows the name of the visitor that submitted this comment.
- **Associated Item Title** shows the name of the Content Manager item (a Component or a Page) that this comment was made for.
- **Associated Item Type** shows the item type of the Content Manager item (Component or Page) that this comment was made for.
- **Moderation Status** shows the status of the comment (as explained above).
- **Comment Score** shows how many visitors have voted in favor or against of this comment. A vote in favor raises this value by 1; a vote against it lowers its value by 1. If you have comment moderation switched on for the Component or Page that this comment belongs to, and if the value reaches the configured minimum value, the comment is automatically removed from the published Web page and submitted for moderation.
- **Last Modified by Moderator** shows the last Content Manager user who modified this comment, if any.

3. To see the full details of a comment, do one of the following:
   - Double-click the comment's row

- Select the comment's row and click **Open** in the **Home** tab of the Ribbon toolbar.
- Right-click the comment's row and select **Open** from the context menu that opens.

The Component or Page that contains this comment opens in a new dialog, with the **Comments** tab selected.Refer to Comments tab for a Component or Page (see page 334) for more details.

## 20.5 Viewing and filtering ratings in the ratings screen

This topic explains what the ratings screen looks like and what you can do to filter its contents.

### Steps to execute

1. To see a ratings screen, do one of the following:
   - In the **Shortcuts** area, navigate to **User Generated Content** > **Top Rated Content**
   - In the **Shortcuts** area, navigate to **User Generated Content** > **Recently Rated Content**
   - In the **Publications** area, select a Publication and navigate to **User Generated Content** > **Rated Content**

   The content area shows the first page of rated items, ordered by rating (highest to lowest) or reverse chronology of rating (last rated items at the top). Click the **Refresh** icon at the top at any time to see the most up-to-date list.

   | Name | Type | From Publication | Average Rating | Date Last Rated | Date Last Commented |
   |---|---|---|---|---|---|
   | Article4 | Page | UGC_02.03.11 | ★★★☆☆ | 3/16/2011 8:13 AM | |
   | Article3 | Page | UGC_02.03.11 | ★★★☆☆ | 3/16/2011 8:12 AM | |

2. Apply any or all filters to change the ratings displayed. The column headers of this table give you the following ways of filtering the results displayed below:

   **Type**

   Select **Component** to see only comments submitted for Components, and **Page** to see only comments submitted for Pages.

   **Date Last Rated and Date Last Commented**

   Select a value to specify a time frame (or no time frame) within which the last rating or comment, respectively, must have been submitted:

   - Select **Show all comments** (or **All** in the column header) to see ratings or comments submitted at any time.
   - Select **Today** to see ratings or comments submitted since midnight today.
   - Select **This week** to see ratings or comments submitted since Monday of the current week.

- Select **This month** to see ratings or comments submitted since the 1st of the current month.
- Select **Select a date or date range** to specify a start date and an end date, and see ratings or comments submitted between those two dates, inclusive.

The content area shows the filtered results. The columns of the filtered results have the following meanings:

- **Name** shows the name of the Component or Page that was rated.
- **Type** shows the type of item for which a rating was submitted: either a Page or a Component.
- **From Publication** shows the root BluePrint Publication for the Page or Component.
- **Average Rating** shows the average rating (rounded to the nearest integer value) represented as a number of stars (between 0 and 5 stars). Note that the actual range of values may be different and has been mapped to a 0-5 scale. For example, if the range of values a visitor can submit is a percentage, that is, a value between 0 and 100, the stars represent the following value ranges:

| Number of stars | Rating value range |
|---|---|
| 0 | 0-9.99% |
| 1 | 10-29.99% |
| 2 | 30-49.99% |
| 3 | 50-69.99% |
| 4 | 70-89.99% |
| 5 | 90-100% |

- **Date Last Rated** shows the date at which the piece of content received its latest rating.
- **Date Last Commented** shows the date at which the piece of content received its latest comment.

3. To see the full details of a rating, do one of the following:

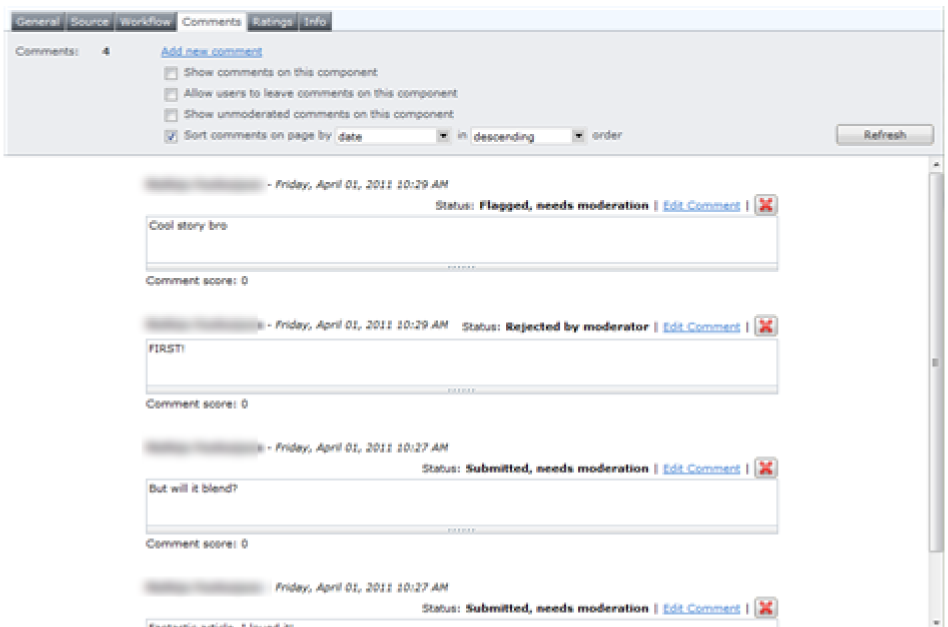
   - Double-click the rating's row.
   - Select the rating's row and click **Open** in the **Home** tab of the Ribbon toolbar.
   - Right-click the rating's row and select **Open** from the context menu that opens.

   The Component or Page that contains this rating opens in a new dialog, with the **Ratings** tab selected. In this tab, you can see the exact value of the rating. Refer to Ratings tab for a Component or Page (see page 334) for details.

# 20.6 Comments tab for a Component or Page

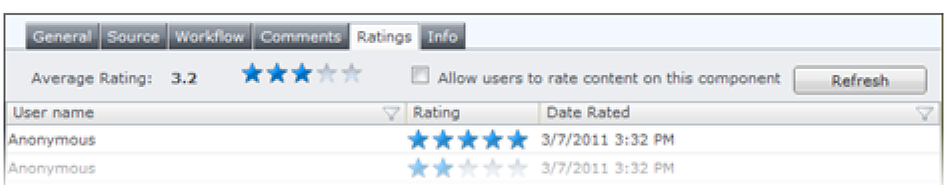
The **Comments** tab of a Component or Page shows all comments submitted for the item. Note that not all comments shown here may be displayed on the published Web page. If comments are subject to moderation, only Comments with the status **Published to Web site** are shown on the published Web page.

You can click **Refresh** at any time to get the most up-to-date list of comments.




# 20.7 Ratings tab for a Component or Page

A Component or Page has a **Comments** tab showing comments submitted for the item, and a **Ratings** tab showing ratings submitted for the item. This topic explains the **Ratings** tab.




The **Ratings** tab shows the following:

- The rating average as a number and as a number of stars (0-5).
  The minimum and maximum values as a number depend on your implementation; consult your SDL Tridion administrator to find out what they are. The star value is the number value mapped to a number between 0 and 5.

For example, if the range of values a visitor can submit is a value between 0 and 25, the stars represent the following value ranges:

| Number of stars | Rating value range |
|---|---|
| 0 | 0-2.49 |
| 1 | 2.5-7.49 |
| 2 | 7.5-12.49 |
| 3 | 12.5-17.49 |
| 4 | 17.5-22.49 |
| 5 | 22.5-25 |

- Controls for this item. Refer to Disallowing rating of a Component or Page (see page 343) for more information.
- Individual ratings as submitted by users.

On this tab, you can do the following:

**See rating averages**

The average rating for this Component or Page is displayed at the top, as a number (rounded off to 1 decimal) and as a number of stars (rounded off to a whole number).

**Refresh the list of ratings**

To see the most up-to-date list of ratings for this Component or Page, click **Refresh**.

**Examine individual ratings**

Below the header, you see the individual ratings as submitted by users, showing the **User name**, **Rating** and **Date Rated**. Click any column header to sort or reverse sort by that property. You can also click the filter icon in the **User name** column header to narrow down your selection to ratings submitted by a specific user or range of users.

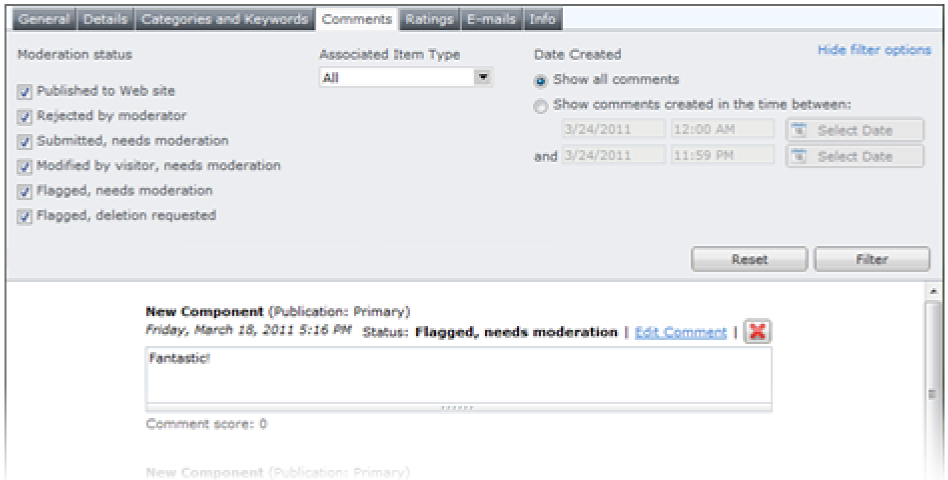
## 20.8 Viewing and filtering comments for a Contact

You can see comments submitted by a specific Contact using the filters available in an Address Book **Comments** tab.

### Steps to execute

1. In the **Publications** area, select a Publication and navigate to **Audience Manager** > **Address Books** .
2. Select an Address Book that contains the Contact you are looking for (or **(All Contacts)** if you do not know which Address Book the Contact belongs to).
3. From the list of results, double-click the Contact to open it, and in the dialog that opens, select the **Comments** tab.

A number of filter options appears in the top of the **Comments** tab, and the bottom of the content area shows all comments submitted by this Contact.




4. Apply any or all filters to change the comments displayed in the bottom half. The filters available to you are:

   **Moderation status**

   Clear any of the status values to not see items with that moderation status in the results; check a status value to see items with that moderation status. The status values are:

   - **Published to Web site** indicates that the comment is currently available for viewing on the published Web page.
   - **Rejected by moderator** indicates that a user has rejected the comment, removing it from the published Web page.
   - **Submitted, needs moderation** indicates that the comment has been submitted by a visitor and is pending moderation. The comment is not yet available for viewing on the published Web page, and may never be.
   - **Modified by visitor, needs moderation** indicates that a visitor has submitted this comment, and it has been made available for viewing on the published Web page. Now, the same visitor who submitted the comment has made changes to it and resubmitted it, and it is pending moderation. The modified comment is not yet available for viewing on the published Web page, and may never be.
   - **Flagged, needs moderation** indicates that a visitor or a Content Manager user has flagged a comment for moderation that is currently available for viewing on the published Web page. The comment is now subject to moderation, the outcome of which may cause it to be removed from the published Web page.
   - **Flagged, deletion requested** indicates that a visitor or a Content Manager user has flagged a comment for deletion that is currently available for viewing on the published Web page. The comment is now subject to moderation, the outcome of which may cause it to be removed from the published Web page.

   **Associated Item Type**

Select **Component** to see comments that this Contact submitted for Components only, and **Page** to see comments that this Contact submitted for Pages only.

**Date Created**

Select a value to specify a time frame (or no time frame) within which this Contact submitted comments:

- Select **All** to see comments submitted at any time.
- Select **Today** to see comments submitted since midnight today.
- Select **This week** to see comments submitted since Monday of the current week.
- Select **This month** to see comments submitted since the 1st of the current month.
- Select **Select a date or date range** to specify a start date and an end date, and see comments submitted between those two dates, inclusive.

When you have configured all your filters, click **Filter** to see all comments that satisfy your filter.

The bottom half of the content area shows the filtered results. If you want, click **Hide filter options** to stop displaying all the filter controls. You can perform the following tasks on individual comments:

- Examining the properties of a comment
- Moderating a comment (see page 339)
- Deleting a comment (see page 340)
- Changing the appearance of comments on the published Web page (see page 345)

## 20.9 Ratings tab for a Contact

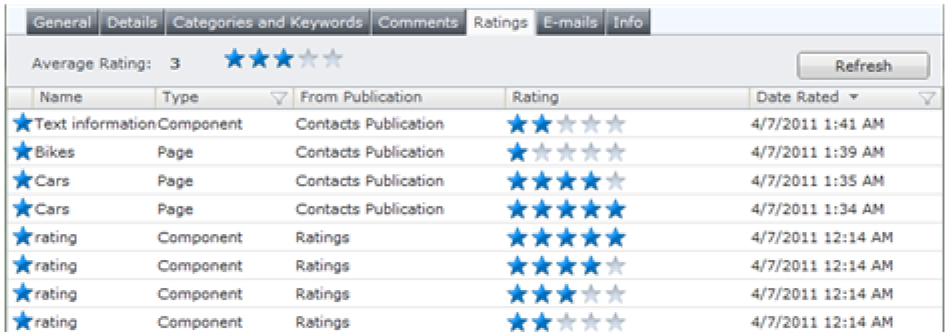
Explains what the Ratings tab for a Contact shows, and what you can do with it.

To view all ratings submitted by a specific Contact, do the following:

- In the **Publications** area, select a Publication and navigate to **Audience Manager** > **Address Books** .
- Select an Address Book that contains the Contact you are looking for (or **(All Contacts)** if you do not know which Address Book the Contact belongs to).
- From the list of results, double-click the Contact to open it, and in the dialog that opens, select the **Ratings** tab.

The **Ratings** tab shows:

- The average of all the ratings submitted by this Contact.
- A **Refresh** button, press this button at any time to see the most up-to-date list of ratings.
- A table showing all ratings submitted by this Contact, in reverse chronological order (newest to oldest), showing the following:




- **Name** shows the name of the Component or Page that was rated.
- **Type** shows the type of item for which a rating was submitted: either a Page or a Component.
- **From Publication** shows the root BluePrint Publication for the Page or Component.
- **Rating** shows the average rating as a number of stars between 0 and 5. The actual range of rating values may not be 0-5, but the actual value is mapped to a 0-5 scale. For example, if the values are an integer value between 0 and 2, then the value 0 is represented by 0 stars, the value 1 is 3 stars (2.5 rounded up) and the value 2 is represented by 5 stars.
- **Date Rated** shows the date at which the piece of content received its latest rating.

Apply any or all filters to change the ratings displayed. The column headers of this table give you the following ways of filtering the results displayed:

**Type**

Select **Component** to see only comments submitted for Components, and **Page** to see only comments submitted for Pages.

**Date Last Rated and Date Last Commented**

Select a value to specify a time frame (or no time frame) within which the last rating or comment, respectively, must have been submitted:

- Select **Show all comments** (or **All** in the column header) to see ratings or comments submitted at any time.
- Select **Today** to see ratings or comments submitted since midnight today.
- Select **This week** to see ratings or comments submitted since Monday of the current week.
- Select **This month** to see ratings or comments submitted since the 1st of the current month.
- Select **Show comments created in the time between** (or **Select a date or date range)** in the column header) to specify a start date and an end date, and see ratings or comments submitted between those two dates, inclusive.

To see the full details of a rating, double-click its row. The Component or Page that contains this rating opens in a new dialog, with the **Ratings** tab selected. In this tab, you can see the exact value of the rating. Refer to Ratings tab for a Component or Page (see page 334) for details.

# 20.10 Moderating a comment

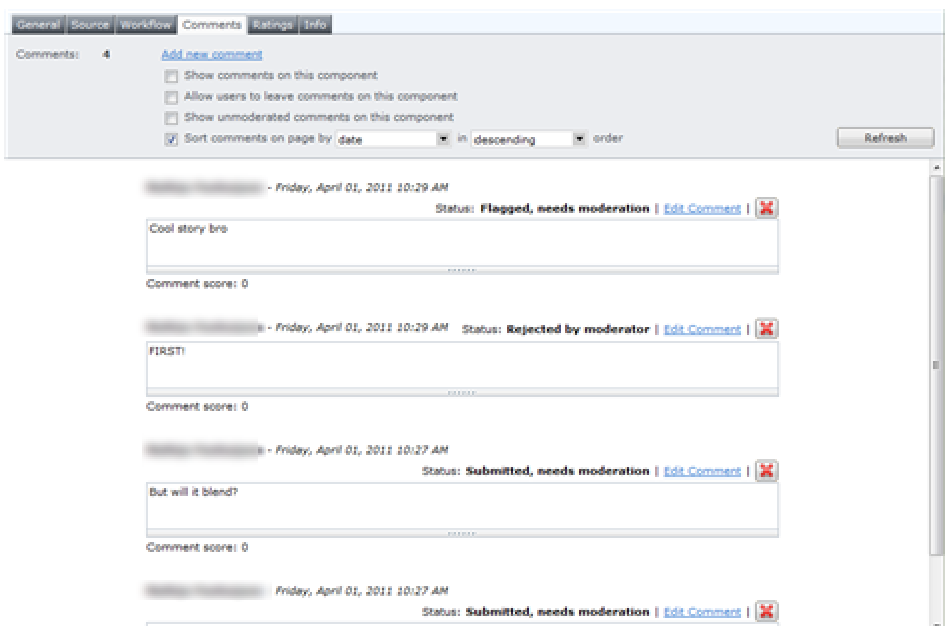
Moderate comments to approve them for appearance of the published Web page, or to reject them.

## Steps to execute

1. Access Content Manager Explorer and do one of the following to see the comment you want to moderate on the **Comments** tab of a Component or Page:

   - Double-click the comment in a comments screen. Refer to Viewing and filtering comments in the comments screen (see page 329) for more information. This opens a Component or Page, preselecting the **Comments** tab that contains the comment you want to moderate.
   - If you know which Component or Page the comment was submitted to, and where that Component or Page is located, navigate to the Component or Page and open it, then select the **Comments** tab.
   - If you know which Contact submitted the comment and in which Publication and Address Book to locate that Contact, navigate to that Contact and open it, then select the **Comments** tab.

   You now see the **Comments** tab that contains the comment you want to moderate.

2. If the **Comments** tab shows many comments, use the search function of your browser to locate the one you want to moderate.

3. Above the comment you want to moderate, click **Edit comment** and do one of the following:

   - To approve the comment 'as is', open the **Status** dropdown and select **Published to Web site**.

- To modify the comment and then approve it, edit the contents of the comment, open the **Status** dropdown and select **Published to Web site**.
- To reject the comment, open the **Status** dropdown and select **Rejected by moderator**.

4. Click **Apply** to apply your moderation.

# 20.11 Deleting a comment

Delete a comment to completely remove it from the system.

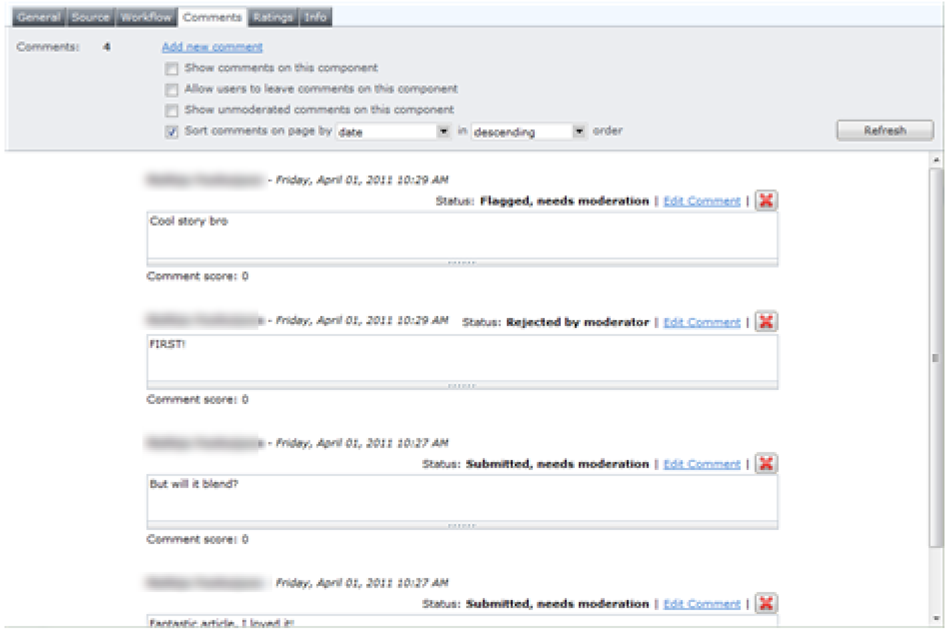
## Steps to execute

1. If you have found the comment you want to delete on a comments screen (refer to Viewing and filtering comments in the comments screen (see page 329) for more information), select the comment you want to delete and do one of the following:
   - Click **Delete** in the **Home** tab of the Ribbon toolbar.
   - Right-click the comment and select **Delete** from the context menu that opens.
   - Press **Delete** on your keyboard.

   You are prompted to confirm the deletion. Click **Yes** to delete the comment.

2. Alternatively, if you know which Component or Page the comment was submitted to, and where that Component or Page is located, navigate to the Component or Page and open it, then select the **Comments** tab. Or if you know which Contact submitted the comment, and which Publication and Address Book contains that Contact, navigate to the Contact and open it, then select the **Comments** tab.

   You now see the **Comments** tab that contains the comment you want to delete.




3. If the **Comments** tab shows many comments, use the search function of your browser to locate the one you want to delete.
4. Above the comment you want to moderate, click the **Delete** button .

   You are prompted to confirm the deletion.
5. Click **Yes** to delete the comment.

### Result

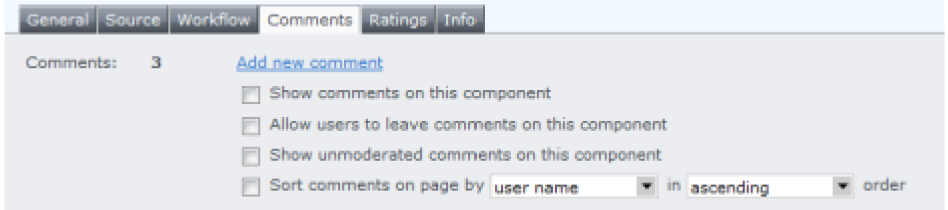
The comment is deleted and no longer appears in Content Manager Explorer, nor on the published Web page.

## 20.12 Enforcing comment moderation for a Component or Page

Enforce comment moderation to prevent unfiltered commenting.

### Steps to execute

1. Access Content Manager and navigate to the Component or Page for which you want to enforce comment moderation.
2. Open the Component or Page and select the **Comments** tab.
3. Clear the option **Show unmoderated comments on this component** or **Show unmoderated comments for on this page** at the top.




4. Click **Save and Close** to commit your change.

### Result

Comments on this Component or Page will now only appear after a moderator has approved them. Refer to Moderating a comment (see page 339) for more information.

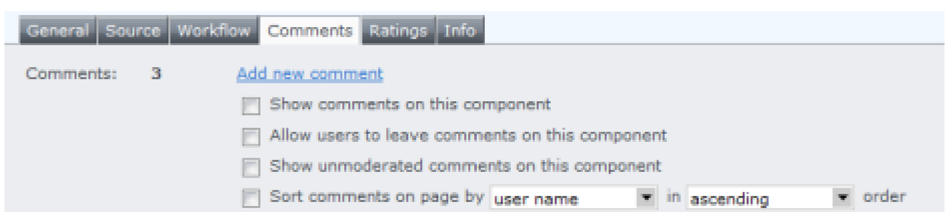
## 20.13 Hiding all comments for a Component or Page on the published Web page

To no longer make any comments for a Component or Page appear on the published Web page, clear the option **Show comments on this Component** or **Show comments on this Page**. If you do this, you very probably also want to disallow commenting.

### Context

### Steps to execute

1. Access Content Manager and navigate to the Component or Page for which you want to hide comments.
2. Open the Component or Page and select the **Comments** tab.
3. Clear the option **Show comments for this Component** or **Show comments for this Page** at the top.




Note: If you do this, you very probably also want to disallow commenting, explained in Disallowing commenting on a Component or Page (see page 343).

4. Click **Save and Close** to commit your change.
5. Republish the Component or Page to apply the change you made.

# 20.14 Disallowing commenting on a Component or Page

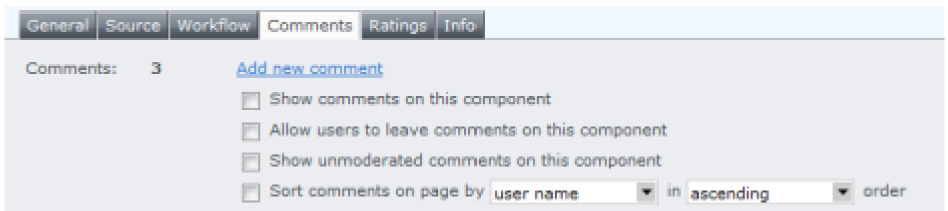
Prevent a Component or Page from ever being commented on, even if rendered with a Template that enables commenting.

## Steps to execute

1. Access Content Manager and navigate to the Component or Page for which you want to disallow commenting.

2. Open the Component or Page and select the **Comments** tab.

3. Clear the option **Allow users to leave comments on this component** or **Allow users to comment on this Page** at the top.




Note: Disabling this functionality does not mean that existing comments that were submitted before now will disappear. To make that happen, refer to Hiding all comments for a Component or Page on the published Web page (see page 342).

4. Click **Save and Close** to commit your change.

5. Republish the Component or Page to apply the change you made.

# 20.15 Disallowing rating of a Component or Page

Stop new ratings from being submitted for a Component or Page.

## Steps to execute

1. Access Content Manager and navigate to the Component or Page for which you want to disallow rating.

2. Open the Component or Page and select the **Ratings** tab.

3. Clear the option **Allow users to rate content on this Component** or **Allow users to rate content on this Page**. Note that by default, this also removes the display of other rating information, such as the average rating or number of ratings submitted, on the corresponding published Web page.

4. Click **Save and Close** to commit your change.

5. Republish the Component or Page to apply the change you made.

### Result

Users can now no longer rate the Component or Page. The published Web page will continue to display the average rating based on ratings submitted until now.

## 20.16 Adding a comment to a Component or Page

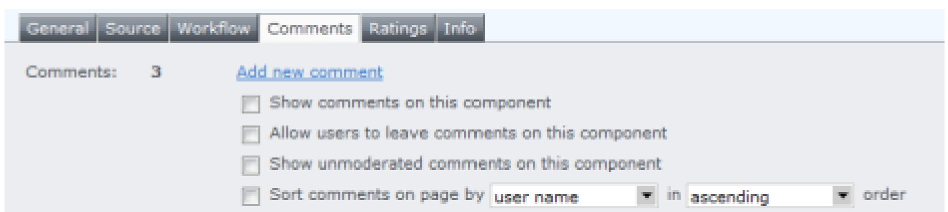
You can add a comment to a Component or Page in the **Comments** tab.

### Steps to execute

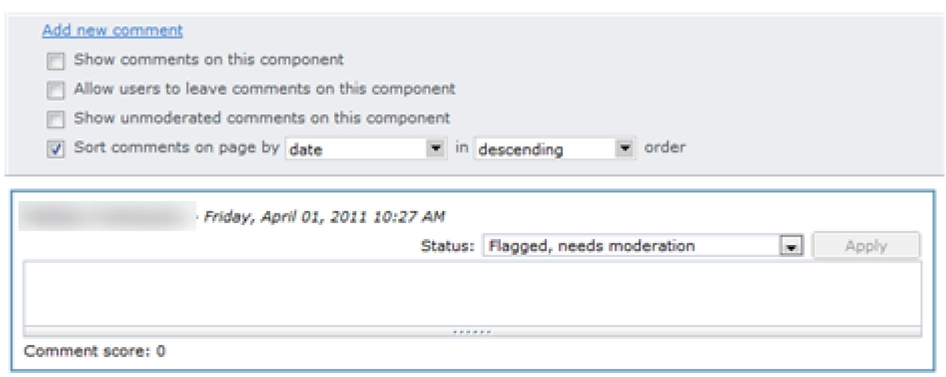
1. Access Content Manager and navigate to the Component or Page to which you want to add a comment.

2. Open the Component or Page and select the **Comments** tab.

3. Click **Add a comment** at the top.




An empty comment box appears below the controls, with a blue border indicating that you can edit it.




4. Fill in the text, select a value for **Status** for this comment, and click **Apply**.

   You are prompted to confirm this submission. Click **Yes** to add this comment.

### Result

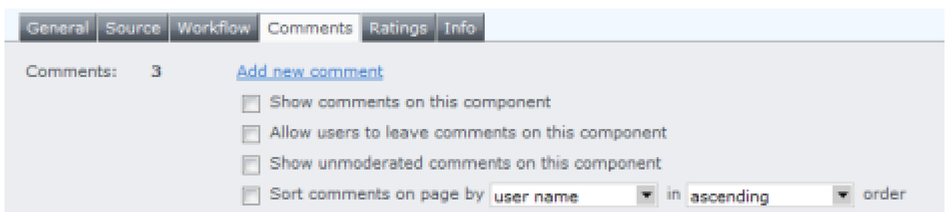
The comment is added to this Component or Page and, if you gave it the right status value, appears on the published Web page.

## 20.17 Changing the appearance of comments on the published Web page

Change the appearance of comments on the published Web page to offer different renderings of the comments.

### Steps to execute

1. Access Content Manager and navigate to the Component or Page for which you want to enforce comment moderation.
2. Open the Component or Page and select the **Comments** tab.
3. Select the option **Sort comments on page by ... in ... order**.




4. Do one of the following:
   - To display comments on the Web page in reverse chronological order (newest comments at the top), select **date** in the first dropdown, and **descending** in the second dropdown.
   - To display comments on the Web page in chronological order (oldest comments at the top), select **date** in the first dropdown, and **ascending** in the second dropdown.
   - To display comments on the Web page sorted by the user name of the visitor who submitted the comment, in alphabetical order (A-Z), select **user name** in the first dropdown, and **ascending** in the second dropdown.
   - To display comments on the Web page sorted by the user name of the visitor who submitted the comment, in reverse alphabetical order (Z-A), select **user name** in the first dropdown, and **descending** in the second dropdown.

   As you change these settings, note that the appearance of comments in this **Comments** tab itself changes accordingly. However, your changes will also be applied to the published Web page.

5. Click **Save and Close** to commit your change.
6. Republish the Component or Page to apply the change you made.

## 20.18 Deleting or unpublishing items with comments or ratings

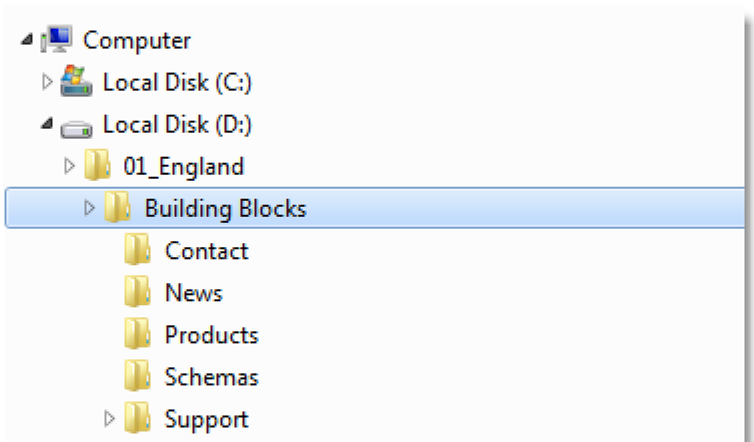
If you delete a Component or Page that has associated comments or ratings, those comments and ratings are also deleted. Unpublishing a Component or Page does not affect comments or ratings. They reappear if and when the item is republished.

# Chapter 21 WebDAV Connector

The WebDAV Connector enables you to access an instance of the Content Manager from a client machine and to navigate and use Publications and folders in the Content Manager as folders in a file system.

You can use WebDAV with Content Manager to view binary files contained inside Multimedia Components, and you can use WebDAV in external applications that supports WebDAV to access Publications, Folders and items contained in Folders such as Components, Schemas, Multimedia Components and Templates.

For example, using WebDAV you can use Windows Explorer to access Content Manager Publications and their Folder:




You can add, edit, delete, and move these items as if they were part of a normal Windows file system. You can open them in external applications, edit content, and save the edited items back to the Content Manager. You can also create new Multimedia Components by dragging and dropping content to a Folder on the Content Manager WebDAV server.

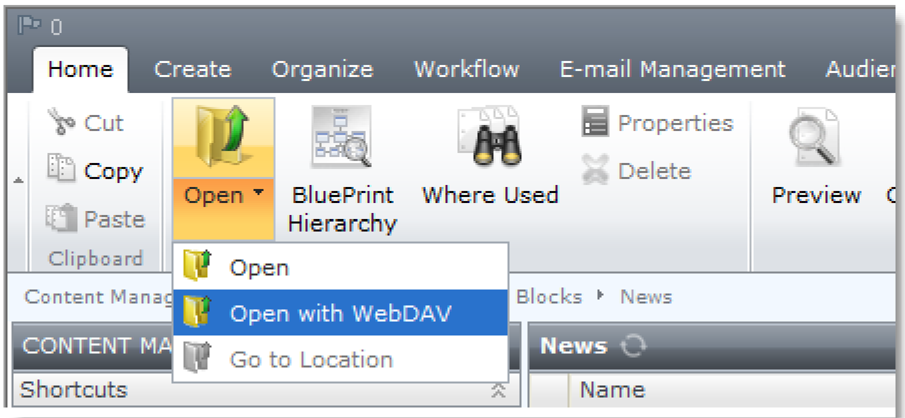
In addition, you can use WebDAV from Content Manager Explorer, the Web interface to the Content Manager, to open binary files inside Multimedia Components.

Note: If you are a Template implementer and you intend to create Dreamweaver Templates, you also use WebDAV to access the Content Manager from Adobe® Dreamweaver® on your client machine. Refer to the installation topics in the online documentation portal to learn how to set up your client machine, and to the templating topics in the portal to learn how to work with Content Manager items from Dreamweaver.

## 21.1 Viewing binary files in Multimedia Components using WebDAV

Explains how WebDAV lets you view the contents of binary files contained in Multimedia Components.

From Content Manager Explorer, the Web interface to the Content Manager, you can use WebDAV to open the binary files contained in Multimedia Components. To do this, select the Multimedia Component and in the **Home** tab of the Ribbon select **Open** > **Open with WebDAV** :




Content Manager Explorer downloads the binary file to a temporary folder, and the default application associated with this type of binary content opens the file. For example, on a client machine that associates JPEG files with Adobe® Photoshop®, selecting **Open with WebDAV** launches Adobe Photoshop and opens the file.

Note: Any changes you make to the file in an external application are **not** saved back to Content Manager. The file you are editing is a copy of the file on your client machine. To edit binary files in Multimedia Components, you must open them from an external application using WebDAV.

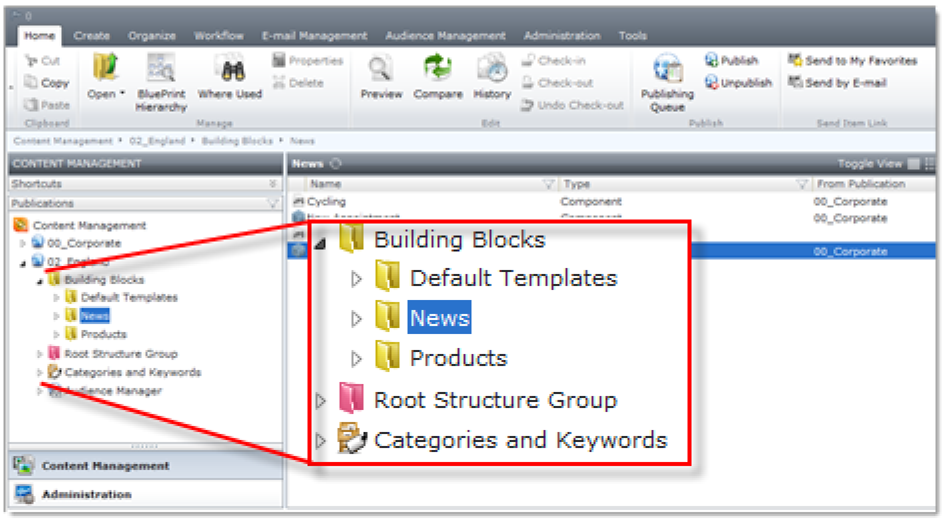
You can also open other items, such as Schemas and Components, using the **Open with WebDAV** button. This results in an attempt to open the XML source of the item.

Note: If you are experiencing problems opening a non-binary item with WebDAV from Content Manager Explorer, upgrade your Microsoft XML Parser (MSXML) version 3.0 to Service Pack 7 or higher. You can install this Service Pack from the Microsoft Web site.

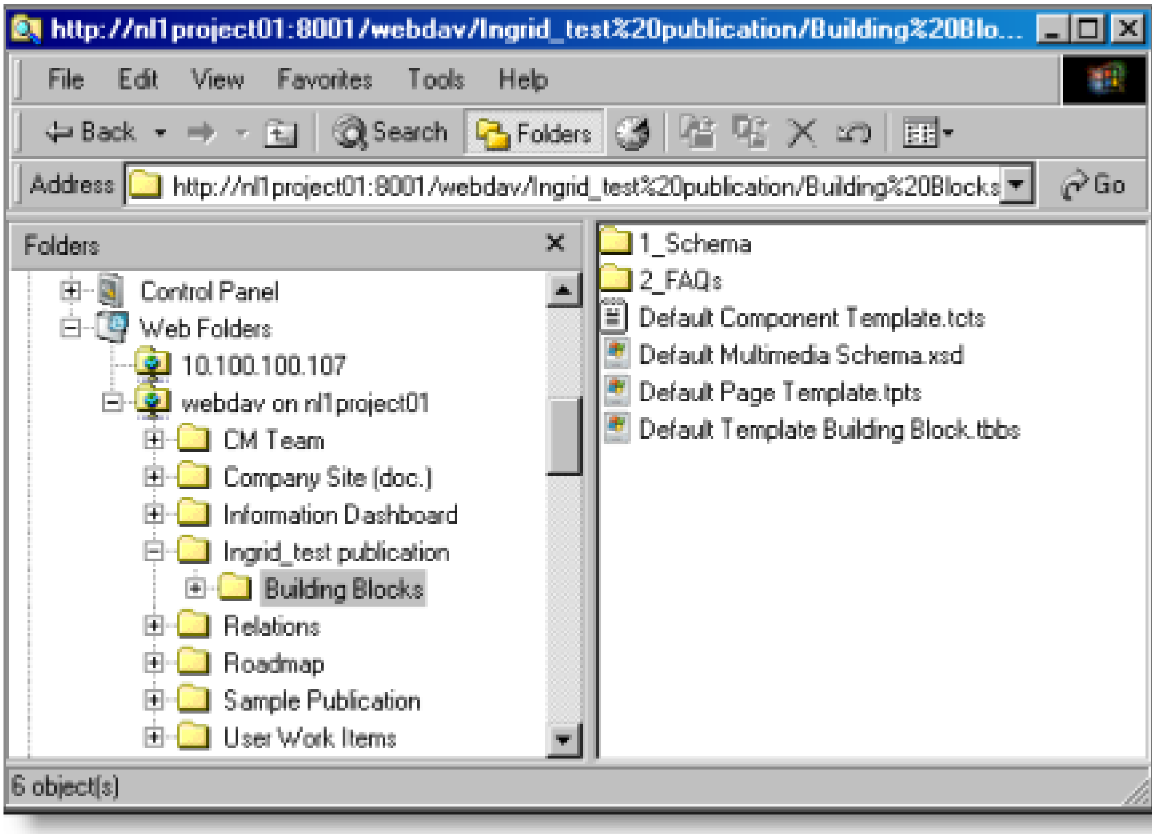
# 21.2 Accessing items from an external application using WebDAV

In a WebDAV-compliant application such as Windows Explorer, you can navigate through Content Manager folders and create, open and edit files.

Content Manager Explorer, the Web interface for Content Manager, shows Publications and Folders using specific icons.




A client application that uses the WebDAV Connector displays Publications and Folder as Windows folders:




## 21.2.1 File extensions for Content Manager items

You can identify the type of Content Manager item by looking at the file extension.

| An item of type... | ...has the file extension |
|---|---|
| Component | `xml` |
| Multimedia Component | ...of the associated binary files |
| Schema | `xsd` |
| Component Template | `tctcmp` |
| Page Template | `tptcmp` |
| Template Building Block - Compound | `tbbcmp` |
| Template Building Block - .NET Assembly | `tbbasm` |
| Template Building Block - Dreamweaver | `dwt` |
| Template Building Block - C# fragment | `tbbcs` |
| Template Building Block - XSLT | `xslt` |

## 21.2.2 Allowed operations

If you access Content Manager items through WebDAV, you cannot perform any action on any type of content item, even if your rights and permissions allow it.

The following table shows the actions you can perform on Content Manager items via WebDAV:

| Item type | View | Create | Edit | Delete |
|---|---|---|---|---|
| Schema | yes | yes | yes | yes |
| Multimedia Schema | yes | no | yes | yes |
| Metadata Schema | yes | no | yes | yes |
| Parameter Schema | yes | no | yes | yes |
| Embeddable Schema | yes | no | yes | yes |
| Component | yes | yes | yes | yes |
| Multimedia Component | yes | yes | yes | yes |
| Page Template | yes | yes | yes | yes |
| Component Template | yes | yes | yes | yes |
| Template Building Block | yes | yes | yes | yes |
| Folder | yes | yes | no | yes |
| Publication | yes | no | no | no |
| Virtual Folder | yes | no | no | yes |
| Page | no | no | no | no |
| Structure Group | no | no | no | no |
| Category | no | no | no | no |
| Keyword | no | no | no | no |
| Target Group | no | no | no | no |

The following table shows exactly what actions you can and cannot do on Content Manager items via WebDAV:

| Item type | Rename | Cut/ paste | Copy/paste | Check in and check out |
|---|---|---|---|---|
| Schema | yes | yes | yes | yes |
| Multimedia Schema | yes | yes | yes | yes |
| Metadata Schema | yes | yes | yes | yes |
| Parameter Schema | yes | yes | yes | yes |
| Embeddable Schema | yes | yes | yes | yes |
| Component | yes | yes | yes | yes |

| Item type | Rename | Cut/ paste | Copy/paste | Check in and check out |
|---|---|---|---|---|
| Multimedia Component | yes | yes | yes | yes |
| Page Template | yes | yes | yes | yes |
| Component Template | yes | yes | yes | yes |
| Template Building Block | yes | yes | yes | yes |
| Folder | yes | no | no | no |
| Publication | yes | no | no | no |
| Virtual Folder | no | yes | no | no |
| Page | no | no | no | no |
| Structure Group | no | no | no | no |
| Category | no | no | no | no |
| Keyword | no | no | no | no |
| Target Group | no | no | no | no |

## 21.2.3 Opening existing items

You can open existing Content Manager items from a WebDAV-compliant interface simply by accessing the **Open** functionality in your Windows application (typically accessible from your application **File** menu).

### Requirements

You may experience problems browsing for, and opening, items with a name that contains special characters. These problems are due to variations in the way that different windows platforms and applications handle these characters. When naming Publications, Folders or items that will be accessed from a client application using WebDAV, ensure that the following reserved characters are not part of the name:

```
< & > # % * : ! ~ +
```

Note: Microsoft Knowledge Base article 826437 (found on the Microsoft support Web site at `http://support.microsoft.com/kb/826437/en-us/`) describes a manual fix for this problem for the characters `*` `:` `%` and `&`.

### Context

Filenames of path names may cause errors when you open an item from, or save an item to, the Content Manager. If this happens, use the drag-and-drop feature to save the item to, and open the item from, you client machine. Edit the item on your machine and then drag-and-drop the file back to the Content Manager using Windows Explorer.

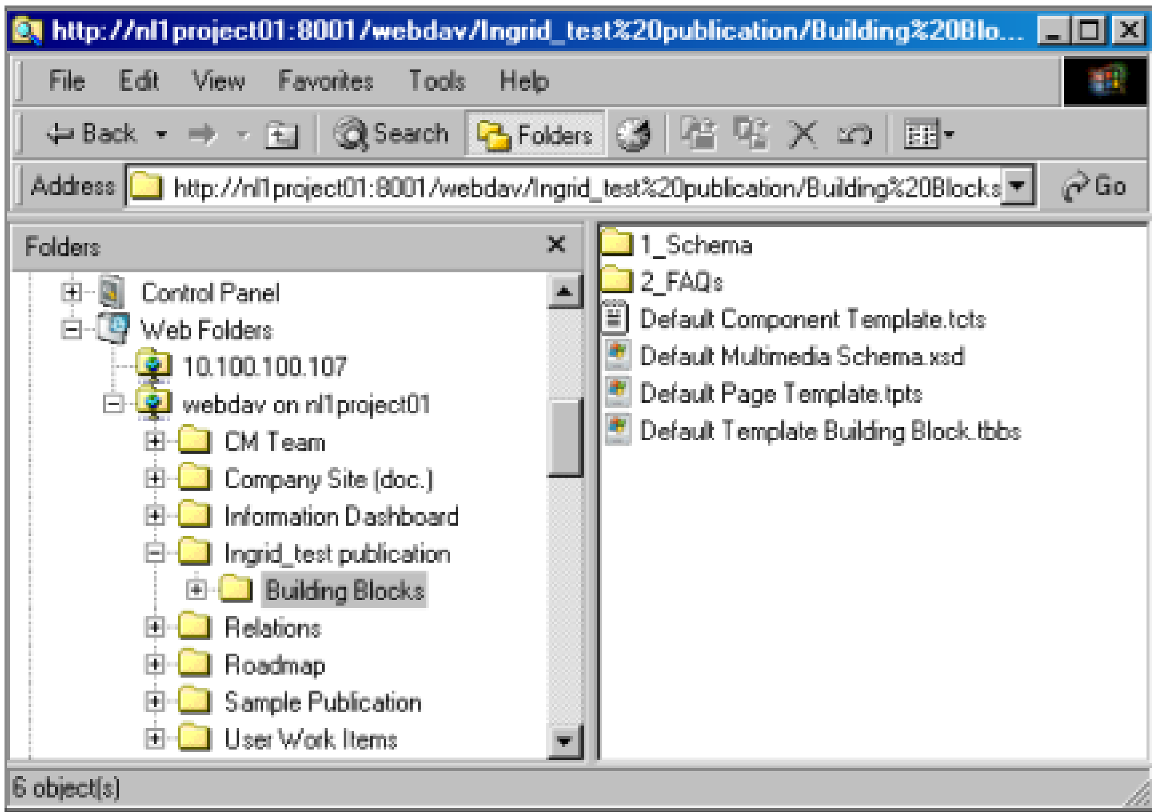
The following task describes accessing Content Manager items through Windows Explorer and from Altova® XML Spy®.

## Steps to execute

1. Access items from Windows Explorer: from the Windows start menu, start Windows Explorer.

2. In the navigation tree on the left, select **My Network Places** and in this node, select the WebDAV folder. At this point, Content Manager may prompt you for a valid user name, password and domain. Provide valid credentials if this happens.

   Windows Explorer displays a list of Windows folders representing Publications in Content Manager. The following image shows one Publication opened to reveal its **Building Blocks** folder.

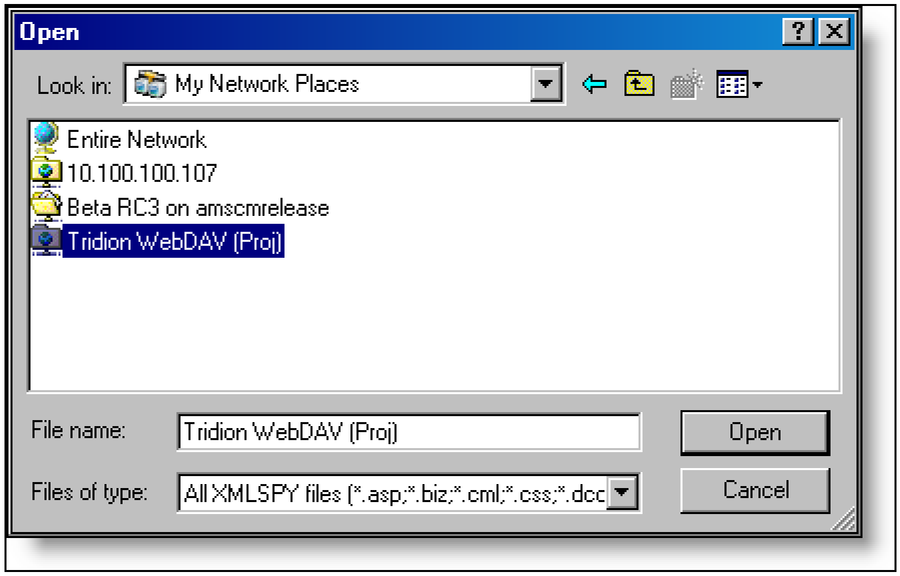



3. Navigate through the folder tree as you would any Windows file system, and open a file you want to view or edit.

4. Access items from Altova XML Spy: from the Windows start menu, start Altova XML Spy.

5. Select **File** > **Open** from the menu bar and select **My Network Places** and the WebDAV folder. At this point, Content Manager may prompt you for a valid user name, password and domain. Provide valid credentials if this happens.

   The **Open** dialog opens, displaying a list of Windows folders representing Publications in Content Manager.




6. Navigate through the folder tree as would any Windows file system, and open a file you want to view or edit.

   By default, XML Spy only displays files of a type that it can handle. Of the standard SDL Tridion item types, these are:

   - XML files (Components)
   - XSD files (SDL Tridion Schemas)
   - XSL/XSLT files (XSLT stylesheet Template Building Blocks)

## 21.2.4 Creating new items

If authorized, you can create Schemas, Components, Multimedia Components, PageTemplates, Component Templates, Template Building Blocks and Folders from an external application that uses WebDAV.

### Requirements

Depending on the type of item you want to create, WebDAV imposes some additional restrictions:

**Schemas**

You cannot create Embeddable Schemas, Multimedia Schemas, Parameter Schemas or Metadata Schemas using WebDAV.

**Components**

Components are subject to the following restrictions:

- If you Component contains Component links fields or Multimedia Component link fields, these fields must contain the WebDAV URL of the target item.
- You must enter the metadata of the Component in a separate node inside the Component XML.
- Any Component you create must be based on an SDL Tridion Schema that is located in the Publication in which you intend to save the Component.

**Multimedia Components**

The Publication in which you intend to create Multimedia Components must contain a Multimedia Schema that supports the binary type of the item you are creating.

### Steps to execute

1. Use your external application's **Save As** functionality, typically located in the **File** menu of your application, to directly save it to the WebDAV folder location.
2. Alternatively, save the item locally, then drag-and-drop the item into the appropriate WebDAV folder using Windows Explorer.
3. Save the file using the correct file extension—for more information, see File extensions for Content Manager items (see page 350).

## 21.2.5 Editing items

If authorized, you can edit Schemas, Multimedia Schemas, Metadata Schemas, Embeddable Schemas, Components, Multimedia Components, Page Templates, Component Templates, and Template Building Blocks from an external application that uses WebDAV:

### Requirements

Depending on the type of item you want to open, WebDAV imposes some additional restrictions:

**Components**

After you have edited it, the Component must remain valid against its SDL Tridion Schema.

- If your Component contains Component links fields or Multimedia Component link fields, these fields must contain the WebDAV URL of the target item.
- Any mandatory (data or metadata) fields must have a default value set in the Schema.
- Any Component you create must be based on an SDL Tridion Schema that is located in the Publication in which you intend to save the Component.

**Multimedia Components**

The Publication in which you intend to create Multimedia Components must contain a Multimedia Schema that supports the binary type of the item you are creating. You cannot edit the metadata of a Multimedia Component; any mandatory metadata fields must have a default value set in the Schema.

### Context

Note: You cannot edit an item if another user has checked it out, or if it is assigned to another user through Workflow.

### Steps to execute

1. Use your external application's **Open** functionality, typically located in the **File** menu of your application, to directly open it from the WebDAV folder location.
2. Alternatively, drag-and-drop the item from the appropriate WebDAV folder to a local folder using Windows Explorer. Edit the item locally, then either save it locally and drag-and-drop it into the WebDAV folder, or save it directly to the WebDAV folder using the **Save As** functionality of your application.

## 21.2.6 Viewing items

To view an item without checking it out in Content Manager, you must open the item in read-only mode in an external application, if the external application allows you to do so.

## 21.2.7 Renaming items

If authorized, you can rename any type of item displayed in the WebDAV server folder tree from an external application using WebDAV.

## 21.2.8 Deleting items

If authorized, you can delete any type of item displayed in the WebDAV server folder tree, except Publications, from an external application using WebDAV.

## 21.2.9 Cutting, copying and pasting items

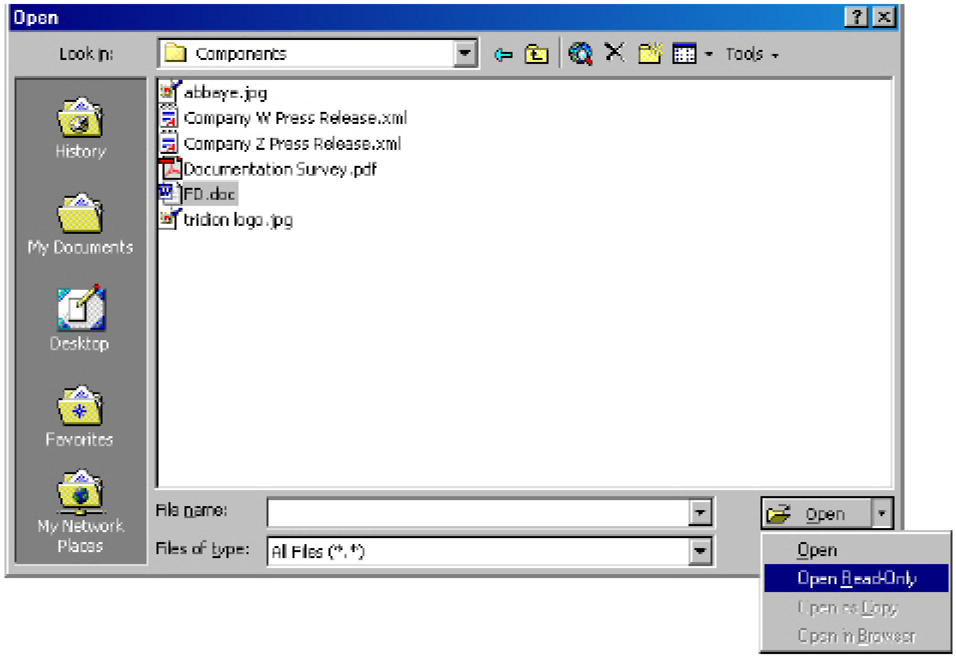
If authorized, you can use copy and paste to copy items between the Folders within a Publication, but not across Publications. In Windows Explorer, use the context menu or the **Edit** menu to select the necessary copy and paste options.

Although copy-paste always works, cut-paste raises an error, "Cannot read from source". So to perform a cut-paste, that is, to move an item, perform a copy-paste, then delete the item in the old location. This preserves the version history of your item. Better yet, you can avoid all complications by performing these kinds of operations in the Content Manager Explorer.

## 21.2.10 Checking items in and checking items out

When you open a Content Manager item from an external application using WebDAV, the item is checked out automatically, unless you explicitly choose, and are able, to open them in read-only mode.

If you external application lets you open an item in read-only mode, it often does so in the **Open** dialog:




When you save a Content Manager item back to the Content Manager using WebDAV, the item is checked in automatically.

## 21.3 Troubleshooting: Opening an item containing non-alphanumeric characters

This troubleshooting section explains how to open items in WebDAV that have certain non-alphanumeric characters in the filename.

**Problem description**

You cannot browse to or open items using WebDAV if the name of the item contains one of the following characters:

```
< & > # % * : | ~ +
```

**Diagnosis**

This problem is inherent to the way in which different Windows platforms and applications handle these characters.

**Solution**

There are several solutions to this problem:

- If the characters that cause problems are among the following: `* : % &` then you can fix this problem manually as described in Microsoft Knowledge Base article 826437 (find this article on the Microsoft support Web site at the URL `http://support.microsoft.com/kb/826437/en-us/`.
- If the characters that cause problems are other, you can do the following:
    - Use the Content Manager Explorer to interact with these items.

- Rename the items in Content Manager Explorer to a name that contains only supported characters, then access those items using WebDAV.