CMS User Manual

for Office of Enterprise Technology

Tridion CMS Implementation



Prepared by



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1 Introduction

1.1 Purpose

The purpose of this User Manual is to provide Content Management System (CMS) users with

- A brief overview of the Tridion system, and
- Clear instructions on how to perform basic tasks.

This manual is specific to OET's Tridion CMS implementation. For more in-depth knowledge about Tridion, see the *SDL Tridion 2009 SP1 User Manual*.

1.2 Project Scope

OET's implementation of a Tridion-based CMS for its public website will replace an older operational CMS (Broad Vision). OET owns the Tridion tool and is responsible for all pertinent hardware and infrastructure support. Tridion is a sophisticated state-of-the-art CMS tool, and staff from OET's Communication Department will need a firm understanding of the basic workings of Tridion to effectively and efficiently utilize its capabilities.

It is expected that there will be a general knowledge transfer regarding Tridion implementation and operational processes from XPAND to the Applications Development team during the course of this project.

The scope of this User Manual is limited to CMS users of Tridion 2009.

1.3 Target Audience

This document is intended for the following CMS users:

- Content Authors.
- · Content Editors, and
- Content Approvers.

These CMS users will work

Within the Content Management environment to create and manage content, and





Within the Content Delivery environment to preview the website.

This document is not primarily intended for the following:

- Template Builders who design and manage templates,
- System Administrators, or
- Tridion technical personnel.

Of course, these users may use this document as they see fit.

1.4 Assumptions and Dependencies

- Tridion Content Management Software and Content Delivery Components are installed and configured in their respective environments and are properly working.
- Tridion .NET API is used for Template development and all the functionality required to implement is available through those APIs.
- Internet Explorer 6 (IE6), IE7 or IE8 is used.





1.5 Terms and Definitions

Note: It may be helpful to print out this page/section for reference.

| Term | Definition |
|------------------|---|
| CMS | Content Management System |
| Category | Categories contain keywords for fixed lists and drop-down menus. |
| Component | In Tridion, content is saved as a Component. Each Component is |
| | based on a "schema." To create a Component, a Content Author |
| | selects a Schema and enters content into the predefined schema fields. |
| Component | Component Templates display the contents of a Component using |
| Template | scripting and HTML formatting. It is <i>not</i> the actual content but defines how the content appears to the end user. |
| Component | A Component Presentation is what the user sees and is the end result |
| Presentation | of a Component (content) being combined with a Component Template (formatting). |
| | Component Presentations don't exist as actual items within Tridion. |
| | Instead they are created "on the fly" by Tridion when the page is |
| | displayed. |
| Content Author | A CMS user whose primary responsibility is to add initial content to the |
| | CMS content repository. |
| Content Editor | A CMS user whose primary responsibility is to modify content in the |
| | CMS content repository. Editors may also add new content. |
| Content Approver | A CMS user whose primary responsibility is to publish (or authorize for |
| | Publication) current versions of content in the CMS content repository. |
| | Approvers may also add or modify content. |
| Content Manager | The Content Manager is the CMS interface. |
| | Importantly, it 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. |





| Term | Definition |
|---------------------|--|
| Folder | Similar to a Windows Explorer folder, a Tridion Folder organizes the |
| | Tridion Building Blocks including Schemas, Components, Component |
| | Templates, and Page Templates. |
| | The actual website Pages are <i>not</i> organized in Folders but are instead found in Structure Groups. |
| Item | An umbrella term that might indicate any of the Tridion Building Blocks. |
| Live Server | The Live Server is the Tridion environment that produces the publicly viewable web pages. |
| Page | Similar to a web page, a Page is what the public user sees. These are organized in Structure Groups. |
| Page Template | A Page Template defines the layout of a page by determining where on the page the Component Presentations are rendered. It provides the design and navigational functionality of a page. |
| Public Site, Public | The public-facing website that is accessible to internal and external |
| Website | users. The URL for the OET's public site is www.oet.state.mn.us. Note |
| | that some content may be accessed only by approved users, so a login page is provided. |
| Publication | A Publication is a collection of content and layout items. Often, a Publication represents all of the Building Blocks that you use to create a Website. |
| | However, some Publications are "master" Publications upon which other Publications are based. For example, the OET public website is based on the OET Common Publication. |
| Schema | A schema defines the fields and field types for particular types of content. To ensure consistency, Tridion content components are based on schemas. |
| Site template | A Site Template is a collection of common page elements such as the header, footer, and navigation items. A single Site Template defines the look and feel and standard behavior that content authors want for all of the pages (or a group of pages) of a site. Site templates should be applied to all pages in Tridion to maintain a consistent layout throughout the site. |
| Stage Delivery | The Stage Delivery Server is a Tridion staging environment that |
| Server | enables users to preview content. |





| Term | Definition | |
|----------------------|--|--|
| Structure Group | A Structure Group in Tridion is equivalent to a Folder in the actual | |
| | website. Content Authors use Structure Groups to organize, manage, | |
| | and provide a URL structure for Pages. | |
| System | A CMS user whose primary responsibility is the maintenance of the | |
| Administrator | Tridion system including establishing roles and permissions. | |
| Taxonomy | Taxonomy is a classification or categorization of things. Within Tridion, | |
| | Taxonomy refers to the classification of some web content. As one | |
| | example, the pull-down menus available to you when creating content | |
| | are the result of the Tridion Taxonomy. | |
| Template Builder | A CMS user whose primary responsibility is creating, editing and | |
| | deleting Tridion templates. | |
| Template Building | A template fragment that can be included in Component Templates, | |
| Block | Page Templates and other Template Building Blocks. These are | |
| | mostly reusable fragments of code that can be included while | |
| | developing the Templates. | |
| Tridion, SDL Tridion | The CMS being implemented as part of the OET website redesign. | |
| User | A person who views or interacts with CMS content. | |
| | | |
| | Users in the context of this document consist of: | |
| | Content Author – Uses the Tridion CMS to add initial content to the | |
| | CMS content repository. | |
| | Content Editor – Uses the Tridion CMS to modify content in the | |
| | CMS content repository. Editors may also add new content. | |
| | Content Approver – Uses the Tridion CMS to publish (or authorize) | |
| | for publication) current versions of content in the CMS content | |
| | repository. Approvers may also add or modify content. | |
| | Template Builder – Responsible for creating, editing and deleting | |
| | Tridion templates. | |
| | System Administrator – Responsible for the maintenance of the | |
| | Tridion system including establishing roles and permissions. | |
| Version, versioning | The means by which a piece of content is identified in the CMS in a | |
| | unique way in regard to its age or state of development. Only the | |
| | "current" (most recent) version of any content can be published. | |
| | However, a <i>copy</i> of an older version may be "restored" (made current). | |
| | Unlike externally archived content, versioned content is accessible to | |
| | non-administrative users of the Tridion CMS. | |





| Term | Definition |
|----------|--|
| Workflow | A Workflow defines 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, and Templates. |

1.6 References

- 1. Functional Requirements Specification v2, March 12, (XPAND Corporation)
- 2. System Design Document, v2, March 29, (XPAND Corporation)
- 3. Tridion's *Managing a Website* PowerPoint Presentation
- 4. SDL Tridion 2009 SP1 User Manual





2 Settings

The browser-based Content Manager Explorer is the main Tridion interface for content developers.

You must use Internet Explorer 6, 7, or 8 to access the Content Manager Explorer.

You must configure both IE and the Content Manager Explorer to ensure that Tridion properly functions.

2.1 Internet Explorer Settings

Note: The following was taken from the *SDL Tridion 2009 SP1 User Manual.*

Encoding

Use Unicode encoding. To set encoding to Unicode:

• From the Internet Explorer menu bar, select **View > Encoding > Unicode**.

Browser Security

The following security settings will ensure that the Content Manager Explorer displays correctly.

To use your security settings:

- 1. From the Internet Explorer menu bar, select **Tools** > **Internet Options**.
- 2. On the **Security** tab, select the **Internet content zone**.
- 3. Click the Custom Level button and enable the following settings:
 - 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 paste operations via script

Click **OK** to enable these settings.

4. On the **Security** tab, select the **Trusted Sites** Web content zone.



5. Click the **Sites** button. In the **Trusted sites** window that appears, type the name of the Content Manager Web address, then click **Add**.

This setting ensures that you can access all content within a Component.

- 6. Select the **Privacy** tab and click the **Advanced** button. Select the **Override automatic** cookie handling option. Select the **Always Allow Session Cookies** option. Click **OK**.
- 7. Click **OK** in the Internet Options window.

If you still have trouble accessing Tridion, *Appendix C, IE7 Security Settings* contains a set of IE7 security settings that are known to work.





Pop-up blocker

If you are using a pop-up blocker, make sure your pop-up blocker is disabled for the Content Manager Website that you are accessing. Otherwise, you will not be able to use the Content Manager.

2.2 Tridion Content Manager Explorer Settings

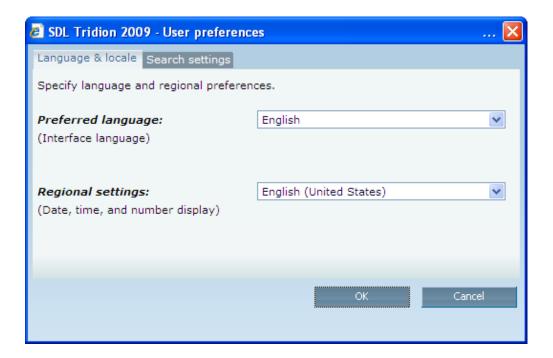
Note: The following was taken from the SDL Tridion 2009 SP1 User Manual.

To change your user preferences:

1. Click the **User Preferences icon** in the Location bar. The **User Preferences** dialog appears.



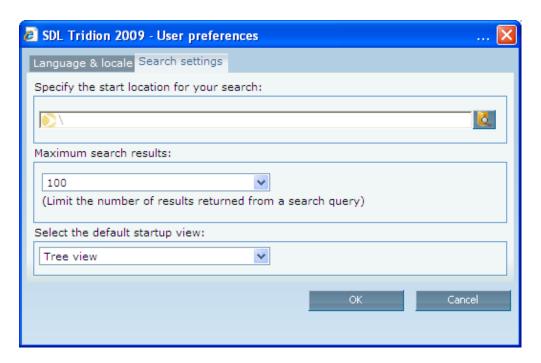
2. On the Language & locale tab, select your preferred language and regional settings.







- 3. On the **Search settings** tab, enter your preferences in the following fields:
 - The start location for the search view.
 - The maximum number of search results returned from a query; and
 - The default startup view of the Content Manager.



4. Click OK.

2.3 Recommended System Display Properties

Note: The following was taken from the SDL Tridion 2009 SP1 User Manual.

To optimize how your browser displays the Content Manager Explorer, we recommend the following settings:

- Screen resolution: 1024x768, and
- Font size to small or 96 dpi.





To set screen resolution and font size:

- 1. On your desktop, right click and select **Properties**. The **Display Properties** window appears.
- 2. On the **Settings** tab, set your screen resolution to 1024x768.
- 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.



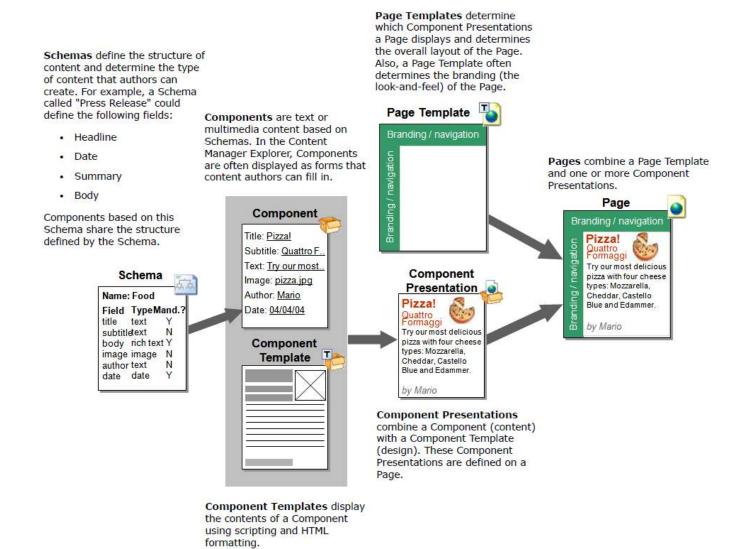


3 Tridion CMS Concepts

3.1 Top-Down View of Tridion

The following graphic shows the major parts of the Tridion system and how they fit together to produce a page.

Note: It may be helpful to print out this page for reference.



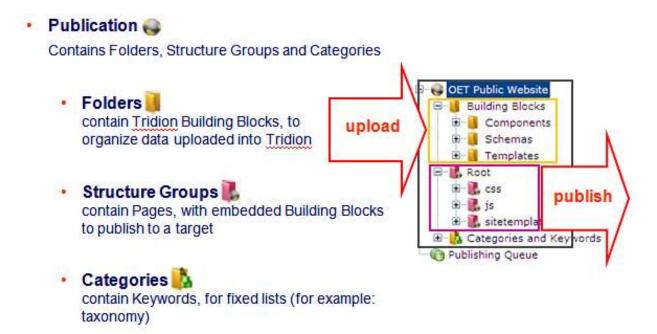




3.2 Publications, Folders, Structure Groups and Categories

Note: It may be helpful to print out this page/section for reference.

The following graphic provides a brief description of Publications, Folders, Structure Groups and Categories.



Generally, a Publication can be thought of as a website. However, one Publication can "inherit" the Tridion Building Blocks, organized in the yellow folders, from another Publication.





3.2.1 **OET-Specific Publications**

As shown in the above graphic, the Tridion System Administrator has created the following 3 Publications:

- OET Base an empty Publication;
- OET Common contains all of the common elements such as reusable template Building Blocks;
- OET Public Website contains all the Building Blocks pertaining to OET public website.
 You will work in this Publication to create, edit and publish content.

The OET Public Website Publication is based (blueprinted) on the OET Common Publication, and future Publications (websites) may be based on the OET Common Publication as well.

Having the OET Common Publication at your disposal

- Enables you to use existing OET Building Blocks,
- Ensures a standardized look and feel, if desired, and
- Greatly decreases development time.

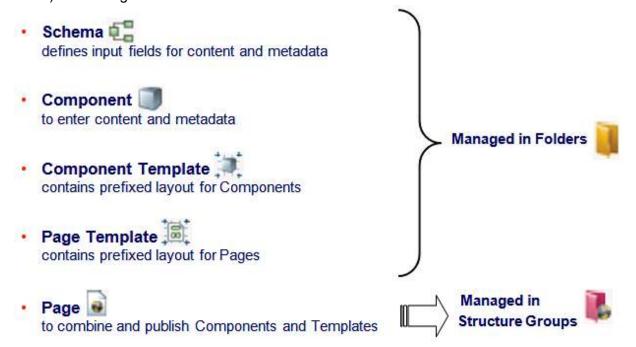




3.3 Schemas, Components, Component Templates, Page Templates and Site Templates

Note: It may be helpful to print out this page/section for reference.

The following graphic shows where the Tridion Building Blocks (the collective name for all these items) are managed.



- When you work on Tridion components, you will work within the yellow Tridion Folders;
 and
- When you work on an actual web page, you will work within a purple Tridion Structure Group.





The Template Designer and other authorized Tridion users have already created the following Building Blocks for the OET website:

- · One site template,
- Three page templates,
- Multiple component templates, and
- Schemas upon which the components and component templates are based.

As a result, you don't need to worry about creating these items, although you will be using them to create and edit actual pages and components.

In fact, your primary roles will be

- Creating and editing components (actual content) using the pre-existing schemas, and
- Creating, editing and publishing pages using the components you create and the preexisting page templates.

You may be wondering why component presentations have not been discussed in this section. The reason is that component presentations don't exist as actual items within Tridion. Instead they are created "on the fly" by Tridion when the page is displayed.





3.3.1 OET-Specific Templates

3.3.1.1 OET Site Template

As of this document's publication, the Tridion Template Designers have created the following site template for the OET public website.



- All of the page templates fit within this template.
- This site template governs
 - The top section of the site, starting at the Minnesota North Star bar through the bread crumb trail, and
 - o The footer of the site, including the copyright information and the bottom buttons.
- For the OET implementation, this single site template provides a static wrapper for all the pages.





3.3.1.2 OET Page Templates

As of this document's publication, the Tridion Template Designers have created three page templates for the OET public website. When a page is displayed to the public, one of the three page templates is displayed within the site template, above.

Essentially, these OET page templates, combined with the more-or-less static site template, provide a framework into which you will insert components (content) combined with component templates (formatting).

Note that the component templates follow a naming convention that enables you to see where they are allowed to go within the page templates. This will be discussed in detail later in this document.

The three existing OET page templates are as follows:

Content Without Left Nav Page Template

Welcome

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt. Proin volutpat arcu id urna ultrices id vulputate nunc convallis. Fusce ut nulla ipsum. Maecenas viverra nibh vitae leo rutrum vehicula eget sit amet massa. Nulla pretium tincidunt nibh vel pharetra. Curabitur enim lorem, bibendum in vulputate quis, placerat vel neque. In nisi nibh, laoreet eget gravida sed, eleifend ut odio. Duis tincidunt feugiat porta.

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Content With Left Nav Page Template

Toggle menu display

Newsroom

- Newsroom
- Newsroom
- Newsroom
- Newsroom
- Newsroom
- Newsroom
- Newsroom
- Newsroom

Welcome

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt. Proin volutpat arcu id urna ultrices id vulputate nunc convallis. Fusce ut nulla ipsum. Maecenas viverra nibh vitae leo rutrum vehicula eget sit amet massa. Nulla pretium tincidunt nibh vel pharetra. Curabitur enim lorem, bibendum in vulputate quis, placerat vel neque. In nisi nibh, laoreet eget gravida sed, eleifend ut odio. Duis tincidunt feugiat porta.

Two Column Content With Left Nav Page Template

Toggle menu display

- ...
- NewsroomNewsroom
- Newsroom
- Newsroom
- Newsroom
- Newsroom
- Newsroom
- NewsroomNewsroom

Welcome

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt. Proin volutpat arcu id urna ultrices id vulputate nunc convallis. Fusce ut nulla ipsum. Maecenas viverra nibh vitae leo rutrum vehicula eget sit amet massa. Nulla pretium tincidunt nibh vel pharetra. Curabitur enim lorem, bibendum in vulputate quis, placerat vel neque. In nisi nibh, laoreet eget gravida sed, eleifend ut odio. Duis tincidunt feugiat porta.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt.

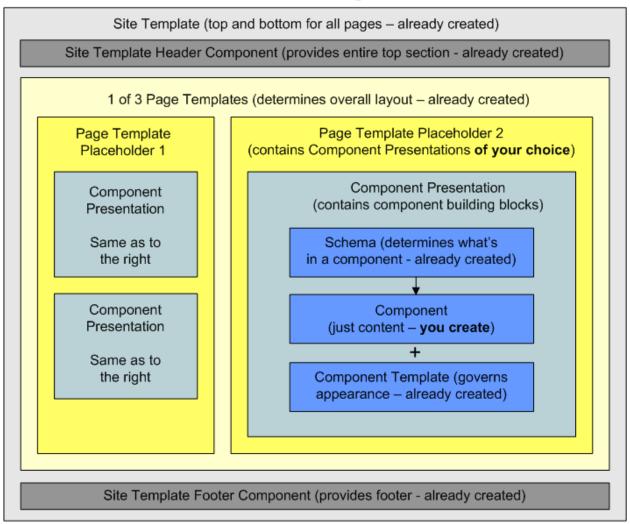




3.3.1.3 Tying the Templates and Components Together

The following graphic shows how the site template, a selected page template (one of the three available), and component templates fit together.

OET Web Page



A new OET web page would combine the following:

- Web page (**you create** in the purple Structure Groups)
- Site template (already created);
- One of the three page templates (already created you select);





- Schema for the component (already created);
- Component (content that **you create** in the yellow components folders);
- Component template; (already created you select),
- Component Presentation (created "on the fly" by Tridion when the page is displayed).

As you can see, much of the background work has already been completed by the Template Designers/Developers and the System Administrator. Keep in mind that you can reuse existing component templates and components, whether created by you or other Authors.





4 User Interfaces

The Tridion Content Manager allows users to create content and layout items separately and then to combine these items to create publishable web pages. As a result, OET personnel can do what they do best. For example, Template Designers can design the look-and-feel of the pages, and Content Authors and Editors can create content/pages and determine where/when the content is published.

The Content Manager offers two user interfaces:

- Content Manager Explorer and
- SiteEdit.

Content Manager Explorer is the main Tridion interface and will be focus of this document.





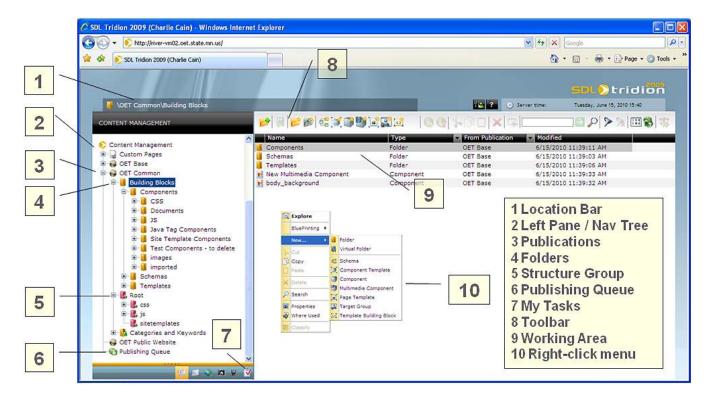
4.1 Content Manager Explorer

The Content Manager Explorer is

- The primary Tridion interface,
- Tree structured (similar to Windows Explorer), and
- Browser-based.

The following screen capture shows the shows the main areas of the Content Manager Explorer in the OET Tridion implementation.

Note: It may be helpful to print out this page/section for reference.

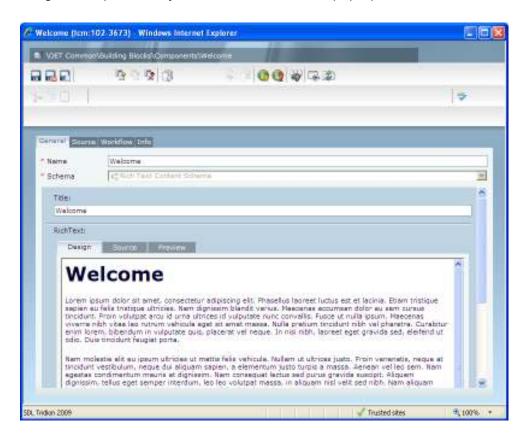


Note that the left side of the page shares many functions (in addition to Content Management, shown above). This will be discussed later.





A significant portion of your work will be done in pop-up windows similar to the one below:



Icons and Shortcuts

The Content Manager Explorer uses numerous icons and shortcuts.

- Appendix A: Content Manager Explorer Icons shows the icons and what they indicate.
- Appendix B: Content Manager Explorer Keyboard Shortcuts contains a list of the keyboard shortcuts.





4.1.1 Location Bar



In addition to setting your user preferences (discussed in section 2 Settings, above), the Location Bar enables you to

- View your location with Tridion,
- View Tridion documentation by clicking on the Online Documentation icon
 and
- View information about the Tridion software by clicking on the Tridion 2009 logo.



4.1.2 Left Pane

The Left Pane is comprised of 6 areas:

- Content Management
- E-mail Management
- Web Site Management
- Search View
- System Administration
- My Tasks



Clicking on an area will turn the focus of the left side of the screen to the selected area. For example, clicking Content Management will make the entire left side a Content Management work area. By clicking on the various buttons, you can toggle between work areas.





To gain additional screen real estate, you can collapse the menu by clicking and dragging the orange bar at the top of the menu. The following image shows the collapsed menu with Content Management as the selected item.



Because of its purpose, this document will cover only the Content Management, Search View, and My Tasks areas.





4.1.3 Content Management

The Content Management area enables you to navigate and select

- Publications, in which you will find:
 - o Tridion Building Blocks (in yellow) such as components, and
 - o Tridion Structure Groups (in purple); and
- Publishing Queue.

Everything is arranged in a tree structure to facilitate navigation.



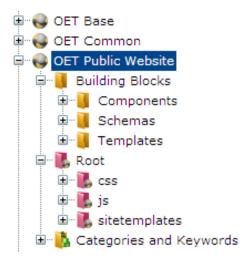
The following items are found within Content Management:





4.1.3.1 Publications

As discussed in *OET-Specific Publications*, above, this Tridion implementation currently has three Publications: OET Base, OET Common, and OET Public Website.



All of the Tridion Building Blocks and pages pertaining to a website reside within a Publication. However, as stated previously, the OET Public Website Publication is based (blueprinted) on the OET Common Publication, and future Publications (websites) may be based on the OET Common Publication as well.

As a result, when working with Building Blocks, you may find that some of the items originate from a Publication that's different than the Publication in which you are working.

4.1.3.2 Folders

Folders organize a Publication's Building Blocks.



Most Publications use a standard set of Folders: Components, Schemas, and Templates.





4.1.3.3 Structure Groups

Structure Groups logically organize a Publication's (website's) pages.



Editors or Approvers create Structure Groups, and as of this document's publication, only one Structure Group, Root, has been created.

However, you may have many Structure Groups within a Publication. Typically, you would have a Structure Group for each logical area of the website. For example, under the Root Structure Group, you could have one Structure Group for Products and Services and another for Policies and Standards.

4.1.3.4 Publishing Queue

The Publishing Queue is the last item in the Left Pane.



Publishing is moving pages and content to a server. Publishing, OET servers, and workflow will be discussed in detail later in this document.





4.1.4 Search

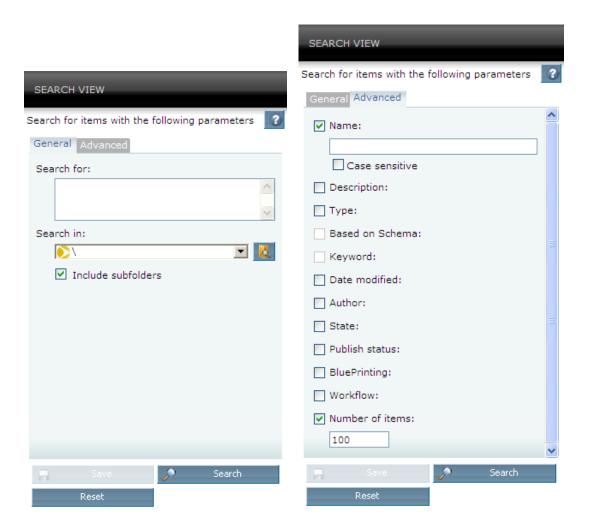
To display the Search View, click the Search View button in the Left Pane.



The Search view enables you to search for specific items by entering search parameters on a general or advanced level. The screen capture on the left shows the general search, and the screen capture on the right shows the advanced search.







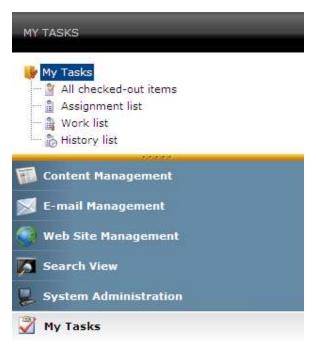
Another way to display the Search view is to click on the search button \nearrow in the Toolbar (discussed below). This automatically displays the Search in the left pane.



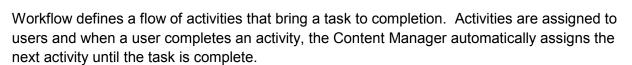


4.1.5 My Tasks

To display My Tasks, click the My Tasks button in the Left Pane. All of the items under My Tasks pertain to workflow.



The My Tasks button in the collapsed menu looks like this:



In the OET Tridion implementation, workflow processes have been created for components and pages. Workflow will be discussed in detail later in this document.





4.1.6 Toolbar



The Tridion Toolbar, which appears directly above the Working Area, contains many icons that change depending upon

- · Your security settings,
- The item selected in the Left Pane, and
- The item displayed in the Working Area.

Inactive icons are grayed out. To view an icon's function, mouse over the icon. Below is a list of icons that may appear in the Toolbar.

| Icon | Description | |
|----------|---------------------------|--|
| | Go to Parent | |
| | Schemas | |
| | Components | |
| ** | Component Templates | |
| 88 | Page Templates | |
| • | Pages | |
| F | Open | |
| | Refresh | |
| P | Search | |
| | Preview | |
| | Advanced list filter | |
| A | Undo advanced list filter | |
| (| Publication | |
| Ĭ. | Folders | |
| - | Structure Groups | |
| | Save | |
| | Save and Close | |
| | Save and New | |



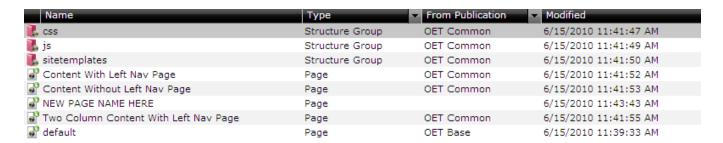


| 100 | Cut |
|-----|-----------|
| | Сору |
| | Paste |
| × | Delete |
| | Publish |
| | Unpublish |

Various self-explanatory multimedia icons that indicate the media type are also used. For a complete list of icons, see *Appendix A: Content Manager Explorer Icons*.

4.1.7 Working Area

The Working Area (also known as the List View in other Tridion Publications) contains the items found in a selected Folder or Structure Group.



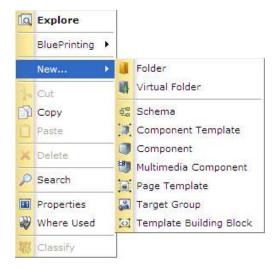
As with Microsoft Windows, you can sort the listed items by clicking on a header. Furthermore, you can filter the items by clicking on a down arrow and selecting filter criteria.





4.1.8 Right-click Menu

When you right click items in the Working Area, a Right-click menu is displayed. The contents of the menu vary depending upon the item you clicked.



4.1.9 Other Content Manager Explorer Functions

The Content Manager Explorer also provides

- Content versioning,
- The ability to check-out and check-in items, and
- Blueprinting.

Content Versioning

Every time you save changes to a component or a page, Tridion creates a new version of that item. 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.





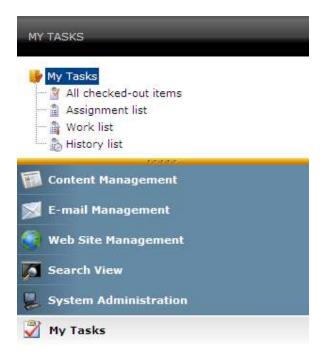


Check-out and Check-in

When you open an item for editing, the Tridion system automatically checks out or "locks" that item. This gives you exclusive use of the current version of the item and blocks editing by all other users.

However, you can also manually check-out an item without immediately working on it. Then, after you have finished, you manually check-in the item so that others may access the item. The advantage to this approach is that you can work on an item for an extended period without fear of it being overwritten.

My Tasks provides you the ability to view the items that you have checked out. My Tasks, check-out/in, and Workflow will be further discussed below.



Blueprinting

A Blueprint is a relationship between Publications whereby Publications may share structure, content, and design from and with other Publications.

As discussed in the *OET-Specific Publications* section, above, the OET Common Publication provides the basis for the OET Public Website Publication.

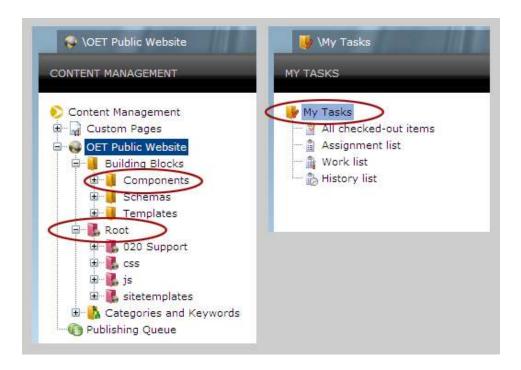




The OET System Administrator performs blueprinting.

4.1.10 Where You Will Be Working in Content Manager Explorer

The following graphic shows where you will be working within the Left Pane:



As stated previously, your primary roles within the OET Tridion implementation will be

- Creating and editing components (actual content found in the yellow folders); and
- Creating, editing and publishing **pages** (found in the purple Structure Groups),





4.2 SiteEdit

SiteEdit is a browser-based user interface that enables users to view, add and edit web page content directly on the stage delivery server.

For the OET Tridion implementation,

- Only Editors and Approvers are allowed to use SiteEdit,
- · SiteEdit is enabled for all pages, and
- SiteEdit can only used on the stage delivery server and not on the live server.

Content Manager Explorer is the preferred Tridion interface and will be focus of this document.





5 OET User Roles and Functions

Tridion roles vary tremendously depending upon the implementation, and the following roles and functions are specific to the OET implementation.

For content development, which is the focus of this document, OET has defined three user roles:

- Content Author,
- · Content Editor, and
- Content Approver.

5.1 "All Roles" (Authors, Editors, and Approvers) Functions

Authors, Editors, and Approvers can do the following:

- Create, delete, and edit your own content;
- Check-out (and thereby lock) content and make it unavailable to other users;
- "Locally" preview the component or pages within the Tridion content management environment.

Authors, Editors, and Approvers cannot do the following:

- Create, edit or delete templates of any kind (site, page, or component); or
- Edit content when the content is checked out by another user.





5.2 Content Author Functions

As an Author, you can do the following:

- Submit content to an Editor; and
- Update content returned to you by an Editor (after Editor's review).

As an Author, you cannot do the following:

- · Create, edit and delete pages; and
- Publish content to either the stage delivery server or the live server.

5.3 Content Editor Functions

As an Editor, you can do the following:

- Submit content to an Approver;
- Edit content created by other users;
- Create, edit and delete pages (not page templates);
- Publish content to the stage delivery server; and
- Assign workflows.

As an Editor, you cannot do the following:

Publish content to the live server.





5.4 Content Approver Functions

As an Approver, you can do the following:

- Edit, approve, and delete content created by other users;
- Create, edit and delete pages (not page templates);
- Route content to Editors for content changes;
- Publish content to both the stage delivery and live servers; and
- Assign workflows.





6 Workflows

Workflows provide a way for the Authors, Editors and Approvers to view a list of items that are assigned to them.

A workflow is not required. Typically, the Communications department and the Application Development team determine whether a workflow is required for a specific item.

When an Editor or Approver assigns a workflow to an item and you (or your group) are part of that workflow, you will receive an email notifying you of the item to be worked on and the activities you need to perform.

You will then be able to access the item in My Tasks > Assignment List.

6.1 Workflows and OET Personnel

- System Administrators create the workflows, and
- Editors and Approvers assign workflows to Tridion components, pages and Publications.
- If needed, System Administrators can override a workflow.

A page may be previewed while in workflow, but it cannot be published.

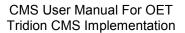
6.2 Overview of OET Tridion Delivery Servers

As of this document's publication, you may have access, depending upon your role, to the following delivery servers:

- The stage delivery server, and
- The live server.

The stage delivery server enables OET personnel, such as those in the Communications Department, to preview content before final publishing to the live server. The live server delivers the OET website to the public.

Publishing takes place on both the stage delivery server and the live server. However,







- Only Approvers can publish to the live server; and
- Editors and Approvers (not Authors) can publish to the stage delivery server.





6.3 Existing OET Workflows

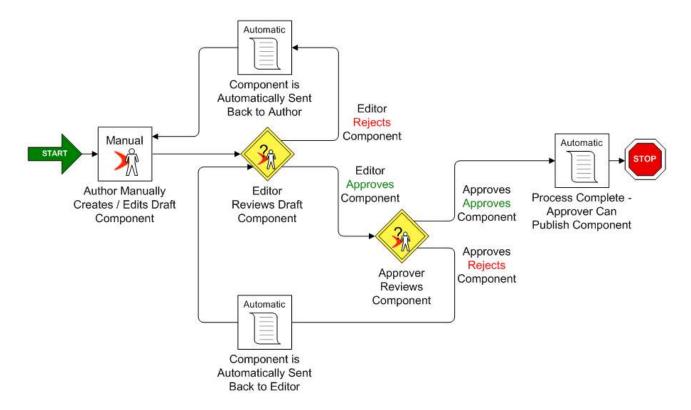
As of this document's publication, two workflows have been created, one for components and another for pages.

Both of these workflows pertain to publishing to the stage delivery server. There are no workflows for publishing to the live server because this process involves only one person, the Approver.

Under certain circumstances, the Approver can simultaneously publish to both the live and stage delivery servers.

Component Workflow

Authors, Editors, and Approvers are part of this workflow.

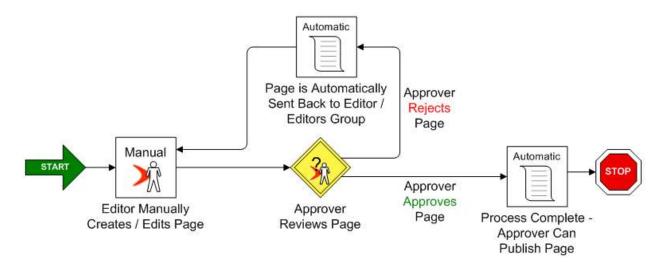






Page Workflow

Only Editors and Approvers are part of this workflow.

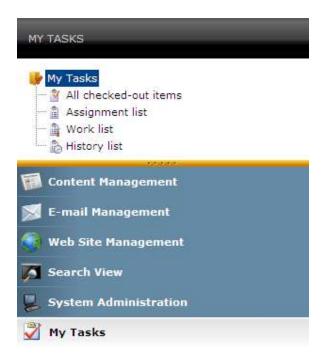






6.4 OET Workflows and My Tasks

Your interface to workflows is My Tasks, found under the Left Pane.



My Tasks consist of both

- "Auto-assigned" items that are part of a workflow, and
- Ad-hoc, non-workflow items that you have checked out.





The following table explains what is displayed after clicking on one of the My Tasks selections.

| Selection | | Shows | | | Workflow / Non-workflow |
|---|-------------------------------|---|-------------|----------|--|
| All Checked-Out Ite | L A | All of the items currently checked out by <i>all</i> users. All of your checked out items will appear within this list. To see just your items, sort/filter the results by the User heading. | | Both | |
| Name | Туре | | Publication | ✓ User | ▼ |
| oet header navigation t LeftNavigation TridionTaxonomy Rose K. Olson OriginalTaxonomy Left Navigation Component Navigation Component homepage index Copy 3 of lorem ipsum Assignment List | Compo Page Page Page | onent onent onent onent onent onent onent onent Template onent Template tems that Have b workflo | * | | niemi iadmin Simmer Simmer iadmin Niemi marata |
| Work List | 1 | You are not currently working on. Items that Have been assigned to you via the workflow, and You are currently working on (checked out). | | Workflow | |
| History List | 1 | Items that • You have worked on and completed (checked in). | | Both | |





7 How to View Your Assigned Tasks and Work on an Item

User Roles: All

| Step | Action | Result / Comments | | |
|------|--|---|--|--|
| 1 | In the Left Pane, click the My Tasks icon | My Tasks is expanded, revealing the following selections: | | |
| | | - All checked-out items | | |
| | | - Assignment list | | |
| | | - Work list | | |
| | | - History list | | |
| | | Comments: | | |
| | | You can also double-click the My Tasks text. | | |
| | | - You can also single-click the "plus sign" to | | |
| | | the left of the icon. | | |
| | MY TASKS | | | |
| | The state of the s | All checked-out items | | |
| | Content Manage | Content Management | | |
| | E-mail Management | | | |
| | Web Site Management | | | |
| | Search View | | | |
| | System Administration | | | |
| | My Tasks | | | |
| 2 | Single-click Assignment list. | All of the tasks that have been assigned to you | | |
| | | appear in the right side. | | |





| | 3 All checked-out items index Page | Comments: Only tasks that are part of a Tridion workflow are displayed. You will also receive non-workflow tasks via other means such as SharePoint. Particular Particul |
|---|--|---|
| 3 | Right-click the item and select Start Activity from the menu. | Tridion moves the item from Assignment list to Work list . |
| 4 | In the Left Pane, navigate to Work list and double-click the item. | A working window containing the selected item is displayed. Comments: You may also right-click the item and select Open. This is the same as double-clicking the item. In these cases, after you finish working on the item, the system will automatically check the item back in. You may also right-click the item and select Versioning > Check-out to explicitly check-out the item. Now, it will remain checked-out until you manually check it back in or save/close the item. The item is now "locked" and cannot be worked on by other users. The working window will vary depending upon what you selected. |





8 How to Create a Component

User Roles: All

Remember:

- A component is actual content.
- When creating a new component, you will select one of nine pre-existing schemas.
- The schema determines the fields for the new component. Fields marked with red asterisks are required.
- Schemas and components are the most fundamental Tridion building blocks.
- You will not use component templates, which simply provide formatting, when creating components. Instead, you will use component templates later on when adding components to pages, discussed in detail later in this document.

This section covers how to create nine types of components (each type is based on an existing schema). Four of the component types are used in pages, and five are used in the OET site template.

However, since the OET site template and its corresponding component types have already been created, you will be working primarily with the four component types used in pages.

Components Types Used in Pages

- Left Navigation
- Rich Text
- Plain Text
- Related Links

Component Types Used in the OET Site Template

- Header
- Header Navigation
- CSS (Cascading Style Sheets)
- JS (JavaScript)
- Footer





Regardless of the component you create, most of the steps are the same. Therefore, we created just 1 procedure, with steps 3 and 4 varying according to the type of component.

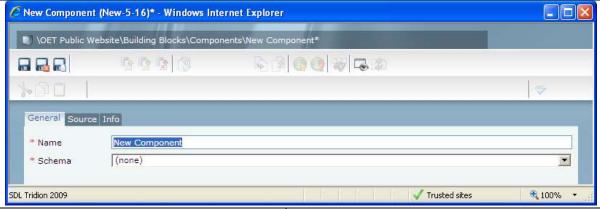
| Step | Action | Result / Comments | |
|------|--|--|--|
| | Steps 1-3 apply to all components, regardless of the selected schema. | | |
| 1 | In the Left Pane, navigate to: | The Components folder is highlighted. | |
| | OET Public Website > | | |
| | Building Blocks > | Comments: | |
| | Components | - OET Public Website is a Structure Group. | |
| | Content Man | agement | |
| | ⊕ Gustom Pages | | |
| | DET Base | | |
| | ⊕ OET Con | ımon | |
| | | ic Website | |
| | | ing Blocks | |
| | | omponents | |
| | | chemas | |
| | | emplates | |
| | ⊞ | | |
| | 🖮 🦍 Categ | gories and Keywords | |
| | Publishin | g Queue | |
| 2 | Right click the Components folder and The New Component dialog window is | | |
| | select: | displayed. | |
| | New > | | |
| | Component | Comments: | |
| | | - You may also click the New Component | |
| | | button in the toolbar. | |
| | | | |
| | | - Each new component must adhere to a | |
| | | single, pre-existing schema. | |
| | | _, _ , , , , , , , , , , , , , , , , , | |
| | | - The General , Source , and Info tabs will | |
| | | be displayed regardless of which schema | |
| | | you select. | |
| | | The General tab is where you will | |
| | | normally work and enter content for | |
| | | the component. | |
| | | | |





- The **Source** tab shows the corresponding XML that is generated by Tridion. (Tridion underpinnings are XML-based.)
- The Info tab shows technical information for the component.

An important item on this tab is the **Item URI:** information. Each item in Tridion has a unique URI which identifies it to the system. You can use the URI to perform searches in the toolbar.



- 3 Enter the name of the new component in the **Name** field and select one of the following schemas from the **Schema** pulldown menu (shown below).
 - Left Navigation
 - Rich Text
 - Plain Text
 - Related Links
 - Header
 - Header Navigation
 - CSS
 - JS
 - Footer

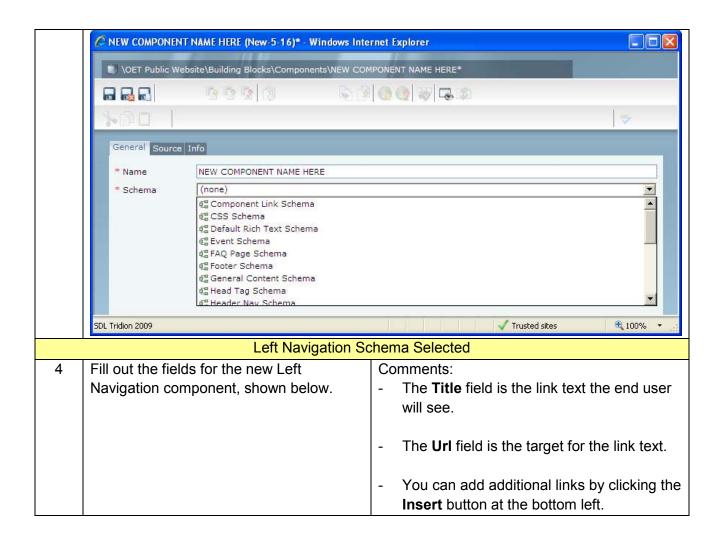
After selecting a schema, the bottom part of the window will automatically display the predetermined fields for that schema.

Comments:

- You don't need to do anything aside from selecting a schema from the pull-down menu.
- Other schemas exist in this menu; be sure to select one of the nine shown to the left.
- Fields marked with red asterisks are required.

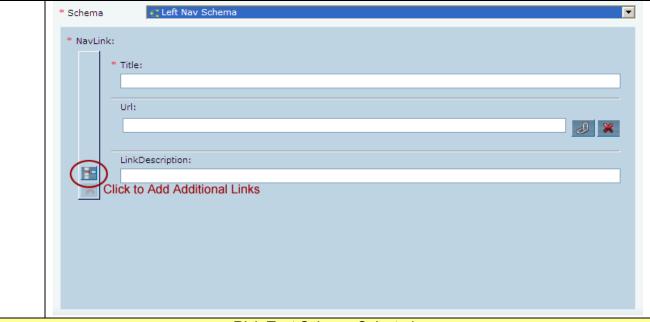












Rich Text Schema Selected

4 Fill out the fields for the new Rich Text component, shown below.

Comments:

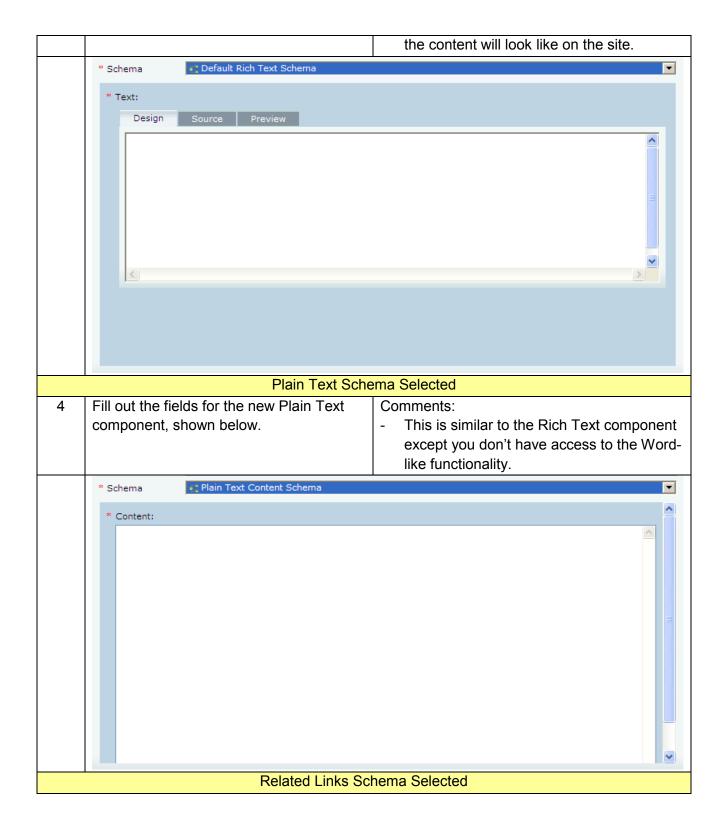
- Much of your work will be done in the Rich Text component.
- The **Design** tab is your primary work interface. When you a click within the white space, a set of Microsoft Word-like controls will appear, enabling you to easily add content.

IMPORTANT: When using this interface, clicking the **Enter** key creates a new paragraph. To just go to a new line within the paragraph, click **Shift-Enter**.

- The **Source** tab shows the corresponding HTML that is generated by Tridion. This Source tab is different from the Source tab at the top of the page, which shows Tridion-generated XML.
- The **Preview** tab enables you to see what







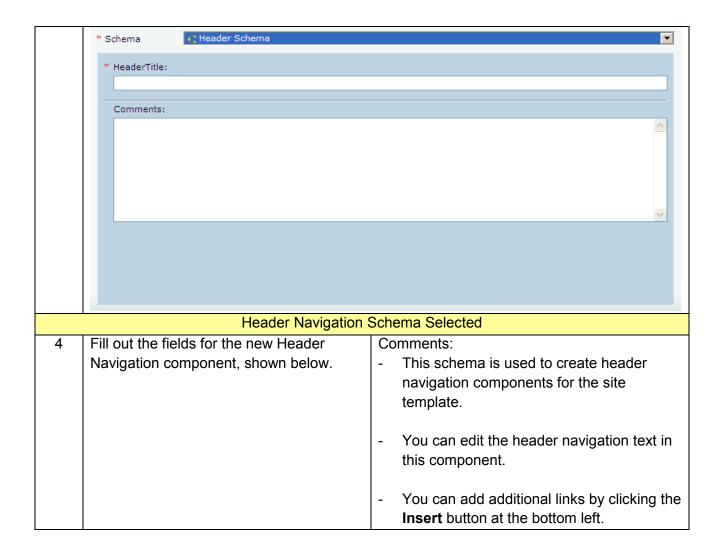




| 4 | Fill out the fields for the new Related | Comments: |
|---|--|---|
| | Links component, shown below. | - This schema is used to create a related links component. |
| | | - You can add additional links by clicking the Insert button at the bottom left. |
| | * Schema | • |
| | * Related Links Display Title: | |
| | Description for related links: | |
| | * Related Links: * Link Text: | |
| | External URL: | |
| | Commentation | |
| | ComponentLink: | |
| | * Target Window: Same Window New Window | |
| | | |
| | | used in the already created site template. ate these components in the near future. |
| | | chema Selected |
| 4 | Fill out the fields for the new Header component, shown below. | Comments: This schema is used to create header components for the site template. |

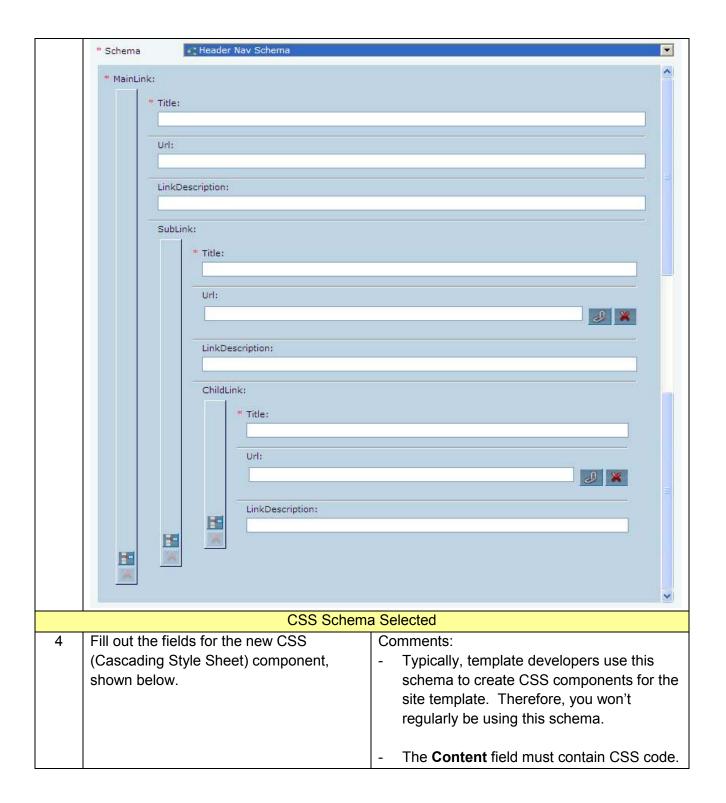






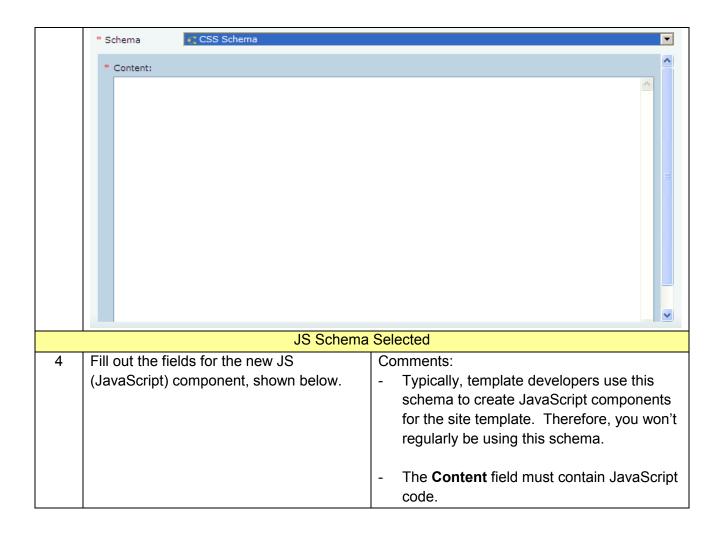






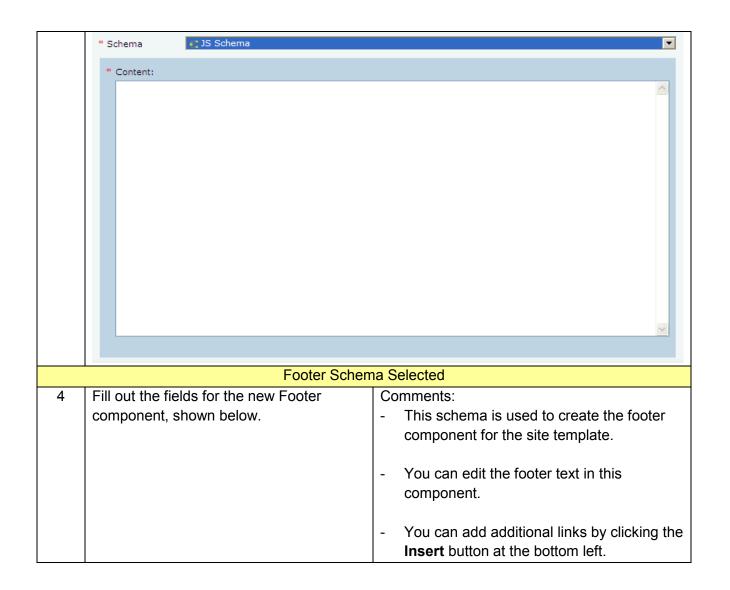






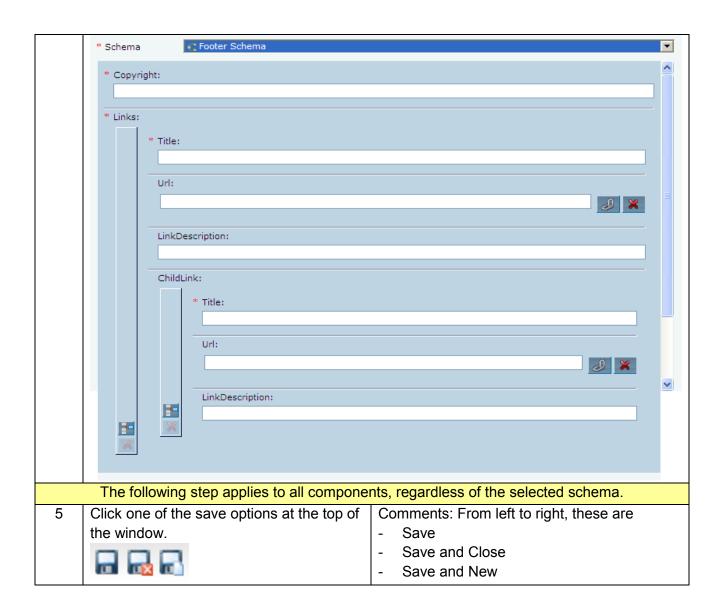
















9 How to Edit a Component

User Roles: All

The fields displayed when editing a component are the same as those found when creating a new component *that uses the same schema*. However, when editing a component, some new tabs and functionality are introduced.

Because you will be using it extensively, we will edit a rich text component in this lesson.

| Step | Action | | | Result / Comments | |
|------|--|---|---|--------------------|--|
| 1 | In the Left Pane, navigate to: | | The Components folder is highlighted, and | | |
| | OET Public Website > | | the contents of the folder are displayed to the | | |
| | | | right. | | |
| | Components | | 1.9 | | |
| | Components | | Comments: | | |
| | | | | | |
| | | | - In the Fr | om Publication | n column, notice |
| | | | that mar | ly of the compo | nents are "from" |
| | | | the OET | Common public | cation. This is an |
| | | | | of blueprinting. | |
| | | | Champic | or blueprinting. | |
| | | | | | |
| | | | | • | ıblication, the OET |
| | | | Public W | ebsite publication | on is based largely |
| | | | on the O | ET Common pu | ıblication. |
| | VJET Public Website (Building Blocks) (C | umparients | | Server total | Politic Art 1 (200 (21) |
| | соителт нимизенент | ● 日本年 電流運動 | MEN OF | - 00 × 4 | |
| | Content Hanagement | KSTIE CSS | Type | SET Common | 5/15/2010 11:55:45 AM |
| | ₩ 🖟 Custom Pages | a Content | Folder | OLI CUIIIIO | 6/21/2010 12/21/21 PM |
| | iii - G OET Base | ₫ Documents | Polder | GET Common | 6/15/2010 11:39:51 AM |
| | ⊕ OET Common ⊕ OET Public Website | 19 | Folder | OET Common | 6/15/2010 11:40:11 AM |
| | ⊞ Building Blacks | Isive Teg Components Site Template Components | Polder Folder | OET Common | 6/15/2010 11:40:07 AM 6/15/2010 11:40:13 AM |
| | # Gomponerts | Test Components - to delete | Folder | QET Common | 5/15/2010 11:40:21 AM |
| | ₩ Schemas | ■ images | Folder | QET Common | 6/15/2010 11/39/51 AM |
| | ₩ II Templates | imported imported | folder | QET Common | 5/15/2010 11:39:57 AM |
| | ₩ & Root | Content Placeholder | Componer | | 6/15/2010 11:40:41 AM |
| | ⊕ ♣ Categories and Keywords | Default Rich Text Component | Componer | | 5/15/2010 11:39:12 AM |
| | Fublishing Queue | Demo home page links Suff Navigation | Componer | | 6/15/2010 11:40:44 AM 6/15/2010 11:40:45 AM |
| | CONTRACTOR OF C | Right Bide Content | Componer | | 6/15/2010 11/42/56 AM |
| | | ₩ Welcome | Componer | | 5/17/2010 11:13:22 AN |
| | | E test attached file | Componer | t OET Common | 6/15/2010 11/40/37 AM |
| 2 | Double-click the comp | onent you wish to | The Edit Co | mponent dialog | g window is |
| | edit. | | displayed, ar | nd the content fi | ields display the |
| | | | existing cont | | |
| | | | Existing Cont | CIII. | |
| | | | | | |





| - You may also right-click the component and select Open . | |
|--|--|
| A lot goes on in this window, and to facilitate readability, the Comments will be continued in a single column, below. | |

Comments (continued from above):

- You cannot change the schema of an existing component; therefore, the **Schema** field is grayed out.
- As with the New Component window, this window has **Design**, **Source**, and **Info** tabs.
- New tabs include Workflow and Statistics.
 - The Workflow tab shows information pertaining to the workflow established for this item.
 - The Statistics tab shows visitation information for this item. Tridion provides several ways for you to modify the results including time frame and types of visitors.
- In the top row, several buttons that were grayed out when adding a new component are now available. These include:
 - o **Check-in** checks-in the component, after which you can no longer make changes, although the window remains open.
 - Undo Check-out checks-in the component, after which you can no longer make changes, although the window remains open.
 - History list shows a list of the versions of the component.
 - Publish You will not publish components to either server.

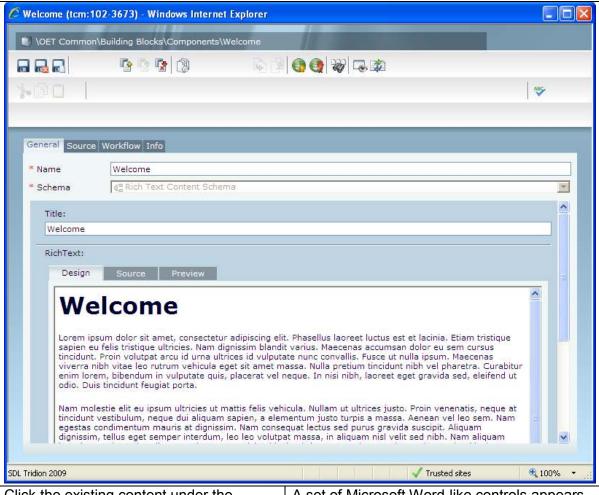
 - Show Where Used shows the page templates and publications in which the component is used, where the component is published, and a graphical





BluePrint Hierarchy.

- Preview shows a preview of the component.
- Compare shows differences between two different versions of the component.



Click the existing content under the **Design tab**.

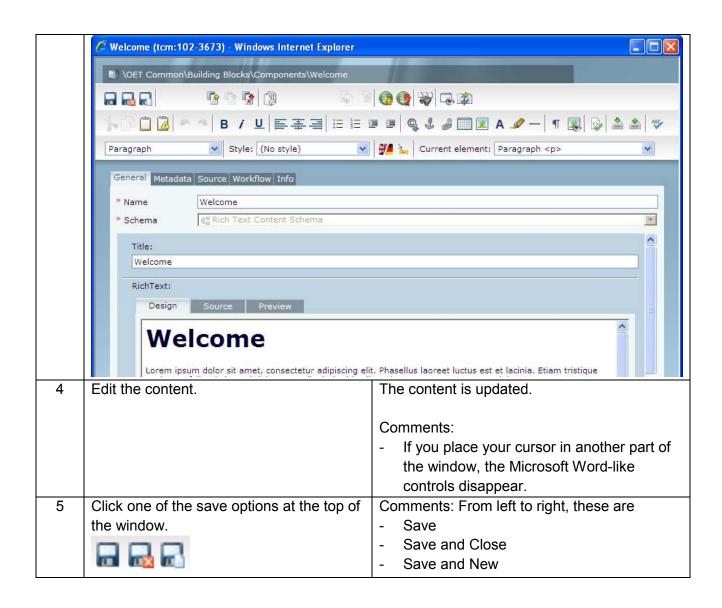
A set of Microsoft Word-like controls appears, enabling you to easily add and edit content.

Comments:

 IMPORTANT: When using this interface, clicking the Enter key creates a new paragraph. To just go to a new line within the paragraph, click Shift-Enter.











10 How to Create a "Content Without Left Nav" Page

User Roles: Editors and Approvers

The following graphic shows the format for this page without the surrounding site template.

Welcome

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt. Proin volutpat arcu id urna ultrices id vulputate nunc convallis. Fusce ut nulla ipsum. Maecenas viverra nibh vitae leo rutrum vehicula eget sit amet massa. Nulla pretium tincidunt nibh vel pharetra. Curabitur enim lorem, bibendum in vulputate quis, placerat vel neque. In nisi nibh, laoreet eget gravida sed, eleifend ut odio. Duis tincidunt feugiat porta.

Nam molestie elit eu ipsum ultricies ut mattis felis vehicula. Nullam ut ultrices justo. Proin venenatis, neque at tincidunt vestibulum, neque dui aliquam sapien, a elementum justo turpis a massa. Aenean vel leo sem. Nam egestas condimentum mauris at dignissim. Nam consequat lectus sed purus gravida suscipit. Aliquam dignissim, tellus eget semper interdum, leo leo volutpat massa, in aliquam nisl velit sed nibh. Nam aliquam interdum malesuada. Aliquam quis est eget nisi vehicula ultrices. Cras sit amet risus enim. Sed vehicula eros sit amet elit semper in euismod sem viverra. Aliquam vel quam eget arcu dignissim tempus eu ut magna.

Remember:

- A page combines an existing **page template**, existing **components** (components are the raw content), and existing **component templates**.
- During the course of creating a page, you will select an existing component template for each component you want to add to your page. In so doing, you will create component presentations. However, component presentations don't exist as actual items within Tridion. Instead, they are created "on the fly" by Tridion when the page is displayed.
- As an aside, component templates, which provide the formatting for a component, are based on the same schemas upon which the components are based. This makes sense when you think about it; the formatting must match the actual content.

| Step | Action | Result / Comments |
|------|--------------------------------|---|
| 1 | In the Left Pane, navigate to: | The Root structure group is highlighted, and |
| | OET Public Website > | the contents of the structure group are |
| | Root | displayed to the right. |





Comments:

- In the From Publication column, notice that many of the components are "from" the OET Common publication. This is an example of blueprinting.
- As of this document's publication, the OET Public Website publication is based largely on the OET Common publication.



2 Right click the **Root** structure group and select:

New... > Page

The **New Page** dialog window is displayed.

Comments:

- You may also click the **New Page** button in the toolbar.
- As of this document's publication, the Root structure group contains all of the pages. In the future, sub-structure groups may be created.
- The following tabs are displayed in the window.
 - The General tab enables you to enter content in the following required fields:
 - Name how the page will be referenced within Tridion;
 - File name how the page will appear in a web browser's URL; and





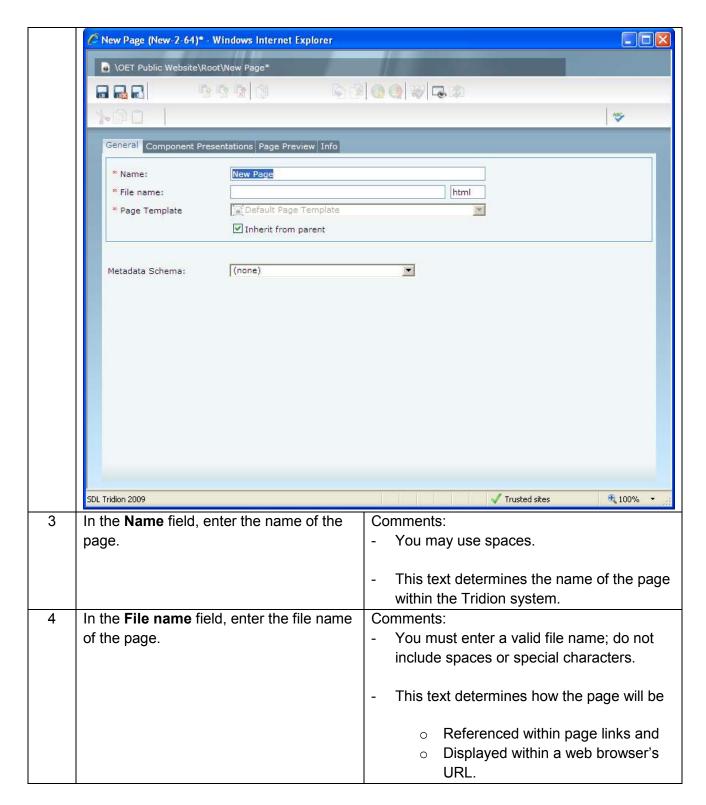
- Page Template governs the overall structure of the page.
- The Component Presentations tab enables you to select
 - The components (content) and
 - The accompanying component templates (formatting for the component)

that you want to include on the page.

The Info tab shows technical information for the page.











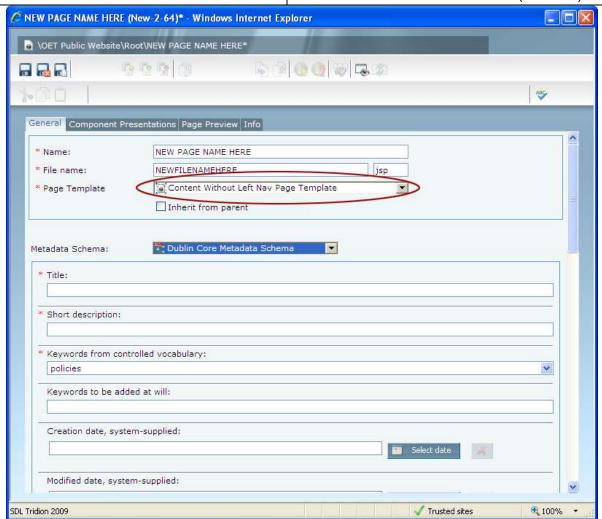
| 5 | Uncheck the Inherit from parent | The previously grayed-out Page Template |
|---|---|---|
| | checkbox. | pull-down menu is activated. |
| 6 | Select Content Without Left Nav Page | Content Without Left Nav Page Template is |
| | Template from the Page Template pull-down menu. | displayed in the pull-down menu. |
| | dem mena. | The extension to the right of the File name |
| | | field changes to .jsp. |
| | | 3 71 |
| | | Comments: |
| | | - Within the OET Tridion implementation, |
| | | the role of the page template is to simply |
| | | organize the content. |
| | | - As of this document's publication, three |
| | | page templates have been created: |
| | | o Content Without Left Nav Page |
| | | Template, ○ Content With Left Nav Page |
| | | Template, and |
| | | Two Column Content With Left |
| | | Nav Page Template. |
| 7 | Select Dublin Core Metadata Schema | Dublin Core Metadata Schema is displayed |
| | from the Metadata Schema pull-down | in the pull-down menu, and several new fields |
| | menu. | pertaining to the page's metadata are |
| | | displayed. |
| | | Comments: |
| | | - The Metadata schema has nothing to do |
| | | with the Tridion schemas used in the |
| | | creation of components. |
| | | - Metadata is "information about |
| | | information," or, in this case, information |
| | | about web page. Web page metadata is |
| | | used by programs on the Internet to better |
| | | classify web pages. Generally, metadata is hidden from users. |
| | | is fliddeff fforff dsers. |
| | | - A metadata schema is optional. If you |





don't want a schema, simply leave it as **(none)**.

- Only the following five fields are required, and three of them are already filled out:
 - o Title;
 - Short description;
 - Keywords from controlled vocabulary (pre-selected from a drop-down list);
 - OET as default; can be changed (filled out);
 - o Use ISO 639-2 format (filled out).



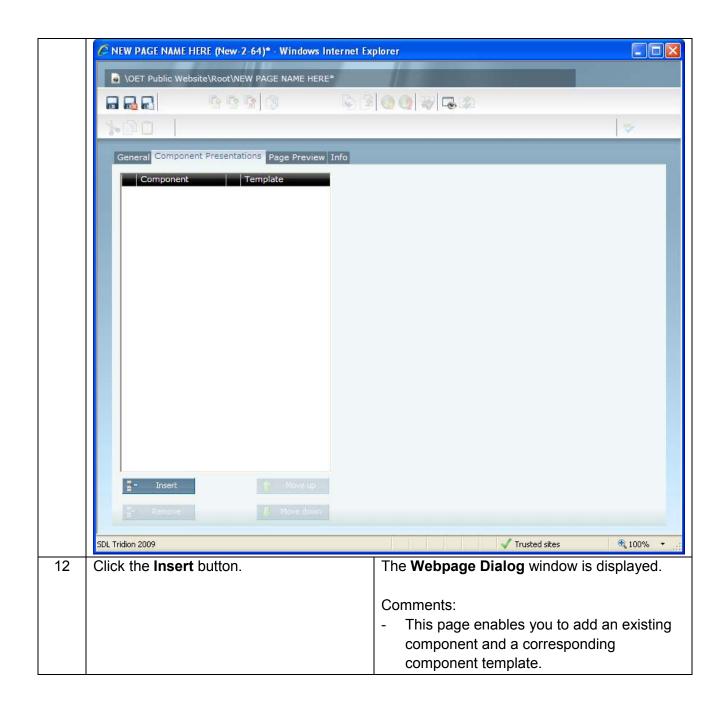




| 8 | Enter a page title in the Title field and enter some descriptive text in the Short description field. | - The Title text becomes the text you see in the blue bar found at the very top of a web browser. - If you are familiar with HTML, the Short description text becomes text in the <meta name="Description"/> tag. |
|----|---|--|
| 9 | From the Keywords from controlled vocabulary pull-down menu, select an existing keyword set for the page you are creating. | Comments: - Currently, three keyword sets exist: Policies, Standards, and Services. - Contact the OET Communications Group to determine the appropriate selection for your page. |
| 10 | Click the Save button to save your work and continue working on this page. | Your work is saved. Comments: The Save button is the left-most button in the "Save" button set. At this point you have created just the framework for a new page. Now you must fill it in with content, that is, add components and corresponding component templates. In fact, if you click the Preview button , you will see nothing but a blank screen. |
| 11 | Click the Component Presentations tab. | A blank page with a Component column header and a Template column header is displayed. |

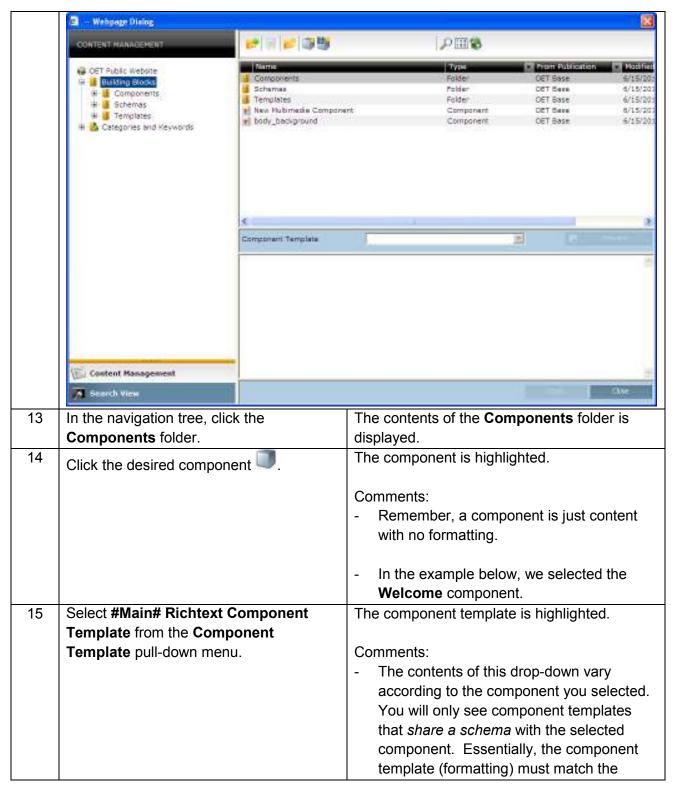
















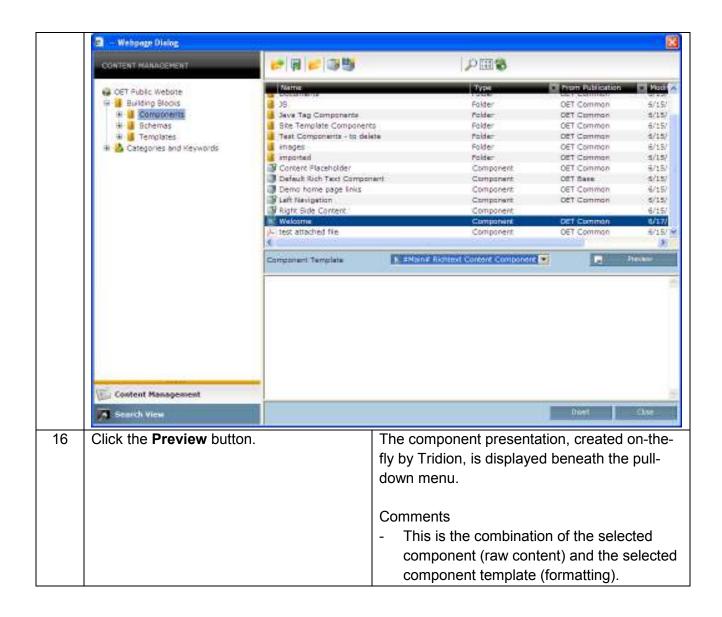
| | component (actual content). |
|---|--|
| - | As of this document's publication, the following component templates for pages are available: o #Main# Richtext Component Template o #Right# Richtext Component Template o #Right# featured links sidebar component template o Left Navigation Component Template |
| - | In the OET implementation, the template name ("Main", "Right", etc.) indicates where the component will appear in the web page. |
| - | IMPORTANT: You must select only component templates appropriate for the page template you selected when you first created the page. For example, this page uses the Content Without Left Nav page template, which, as the name implies, does <i>not</i> have a left navigation column. If you select the Left Navigation Component Template, the page template |

has no place to put the component

presentation, and it simply will not appear.

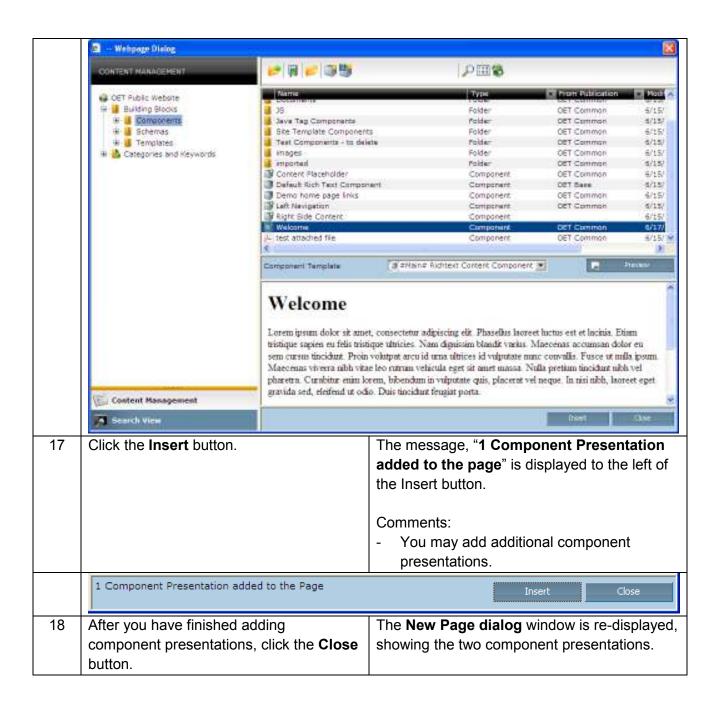






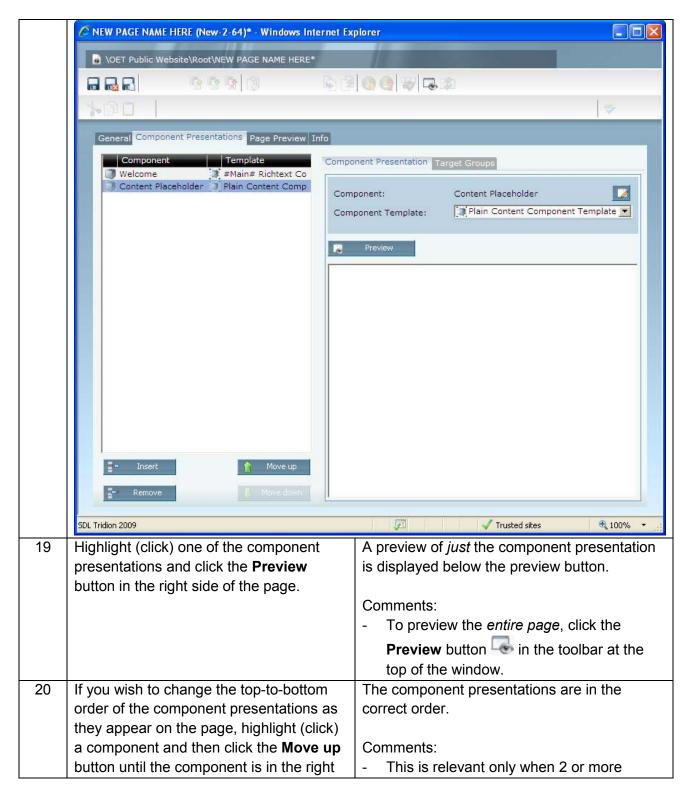








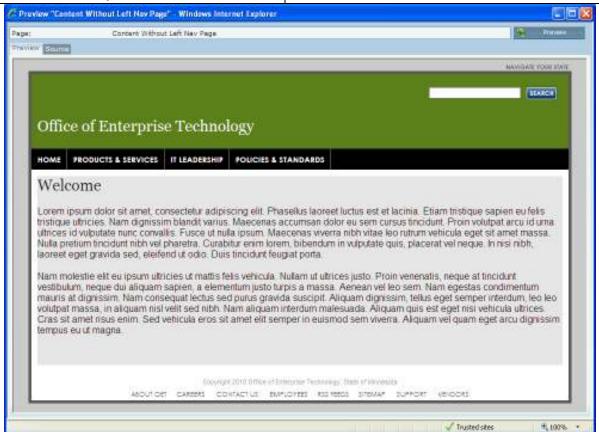








| | place. | component presentations share a column |
|----|--|---|
| | | in the page template. |
| 21 | Click the Save button 🔚 to save your | The page is saved. |
| | work and continue working on this page. | |
| 22 | Click the Preview button in the toolbar at the top of the window. | The page as it appears on the site (with the surrounding site template) is displayed. |







11 How to Create a "Content With Left Nav" Page

User Roles: Editors and Approvers

The following graphic shows the format for this page without the surrounding site template.

| Toggle menu display | Welcome |
|--|---|
| Newsroom | Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt. Proin volutpat arcu id urna ultrices id vulputate nunc convallis. Fusce ut nulla ipsum. Maecenas viverra nibh vitae leo rutrum vehicula eget sit amet massa. Nulla pretium tincidunt nibh vel pharetra. Curabitur enim lorem, bibendum in vulputate quis, placerat vel neque. In nisi nibh, laoreet eget gravida sed, eleifend ut odio. Duis tincidunt feugiat porta. |

Remember:

- A page combines an existing **page template**, existing **components** (components are the raw content), and existing **component templates**.
- During the course of creating a page, you will select an existing component template for each component you want to add to your page. In so doing, you will create component presentations. However, component presentations don't exist as actual items within Tridion. Instead, they are created "on the fly" by Tridion when the page is displayed.
- As an aside, component templates, which provide the formatting for a component, are based on the same schemas upon which the components are based. This makes sense when you think about it; the formatting must match the actual content.

| Step | Action | Result / Comments |
|------|--------------------------------|---|
| 1 | In the Left Pane, navigate to: | The Root structure group is highlighted, and |
| | OET Public Website > | the contents of the structure group are |
| | Root | displayed to the right. |
| | | Comments: - In the From Publication column, notice that many of the components are "from" the OET Common publication. This is an |





example of blueprinting.

 As of this document's publication, the OET Public Website publication is based largely on the OET Common publication.



2 Right click the **Root** structure group and select:

New... > Page

The **New Page** dialog window is displayed.

- You may also click the New Page button in the toolbar.
- As of this document's publication, the Root structure group contains all of the pages. In the future, sub-structure groups may be created.
- The following tabs are displayed in the window.
 - The **General** tab enables you to enter content in the following required fields:
 - Name how the page will be referenced within Tridion;
 - File name how the page will appear in a web browser's URL; and
 - Page Template governs the overall structure of the page.



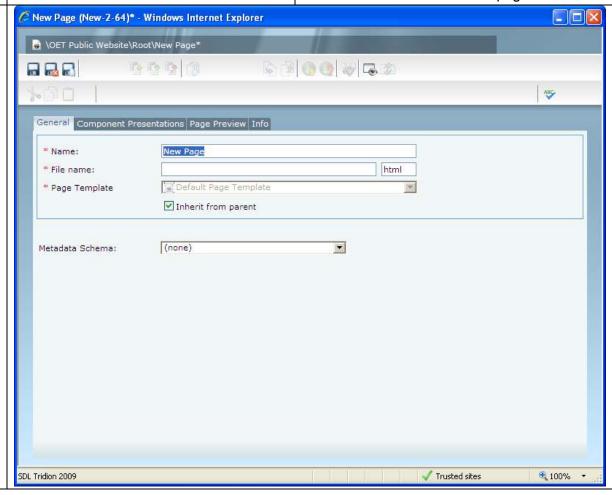


The Component Presentations tab enables you to select

- The components (content) and
 - The accompanying component templates (formatting for the component)

that you want to include on the page.

The Info tab shows technical information for the page.







| 3 | In the Name field, enter the name of the | Comments: |
|---|--|---|
| | page. | - You may use spaces. |
| | | |
| | | - This text determines the name of the page |
| | | within the Tridion system. |
| 4 | In the File name field, enter the file name | Comments: |
| | of the page. | - You must enter a valid file name; do not |
| | | include spaces or special characters. |
| | | |
| | | - This text determines how the page will be |
| | | 5.6 |
| | | Referenced within page links and |
| | | Displayed within a web browser's |
| | | URL. |
| 5 | Uncheck the Inherit from parent | The previously grayed-out Page Template |
| | checkbox. | pull-down menu is activated. |
| 6 | Select Content With Left Nav Page | Content With Left Nav Page Template is |
| | Template from the Page Template pull- | displayed in the pull-down menu. |
| | down menu. | The systematical to the gircht of the File manner |
| | | The extension to the right of the File name |
| | | field changes to .jsp. |
| | | Comments: |
| | | - Within the OET Tridion implementation, |
| | | the role of the page template is to simply |
| | | organize the content. |
| | | organize the content. |
| | | - As of this document's publication, three |
| | | page templates have been created: |
| | | ○ Content Without Left Nav Page |
| | | Template, |
| | | ○ Content With Left Nav Page |
| | | Template, and |
| | | o Two Column Content With Left |
| | | Nav Page Template. |
| 7 | Select Dublin Core Metadata Schema | Dublin Core Metadata Schema is displayed |
| | from the Metadata Schema pull-down | in the pull-down menu, and several new fields |
| | menu. | pertaining to the page's metadata are |
| | | displayed. |

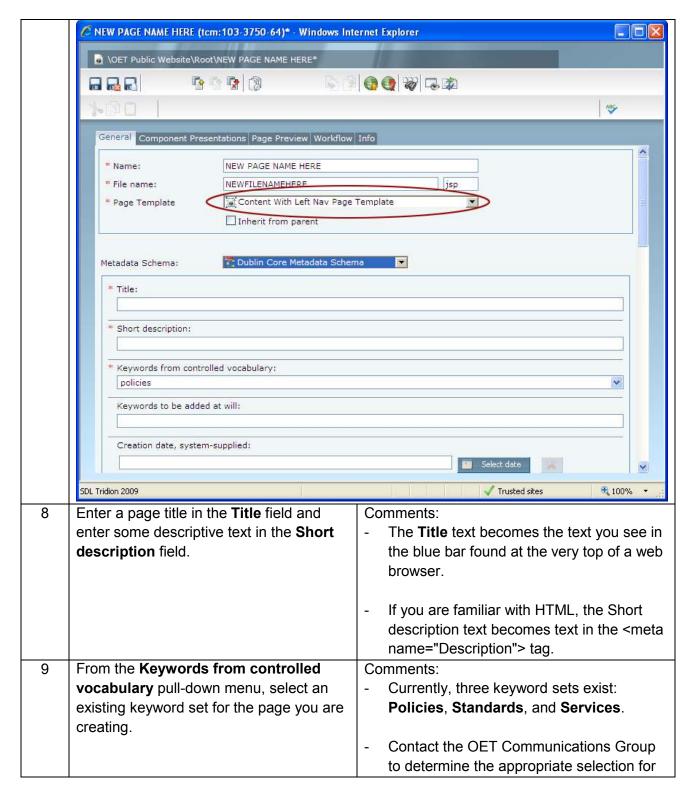




- The Metadata schema has nothing to do with the Tridion schemas used in the creation of components.
- Metadata is "information about information," or, in this case, information about web page. Web page metadata is used by programs on the Internet to better classify web pages. Generally, metadata is hidden from users.
- A metadata schema is optional. If you don't want a schema, simply leave it as (none).
- Only the following five fields are required, and three of them are already filled out:
 - o Title;
 - Short description;
 - Keywords from controlled vocabulary (pre-selected from a drop-down list);
 - OET as default; can be changed (filled out);
 - o Use ISO 639-2 format (filled out).







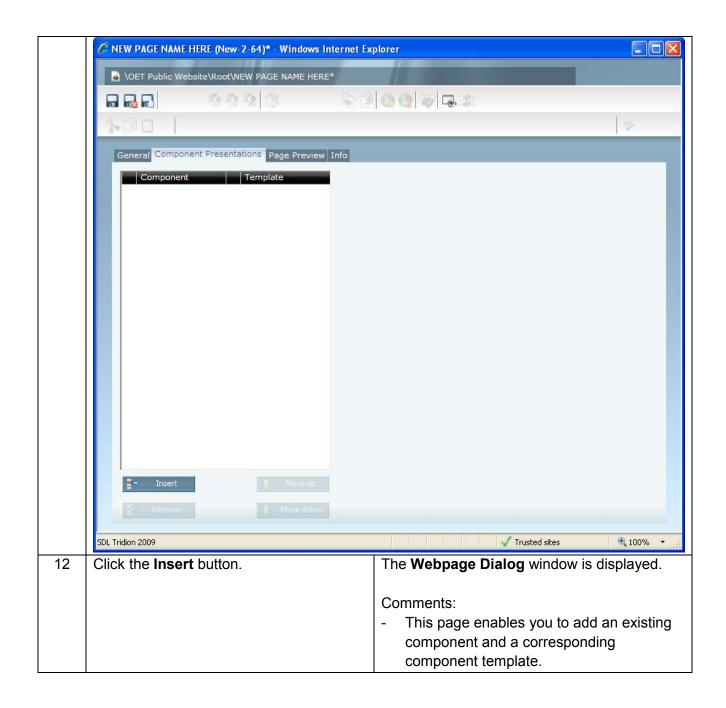




| | | vour page |
|----|---|---|
| 10 | Click the Save button to save your work and continue working on this page. | your page. Your work is saved. Comments: - The Save button is the left-most button in the "Save" button set. - At this point you have created just the framework for a new page. Now you must |
| | | fill it in with content, that is, add components and corresponding component templates. In fact, if you click the Preview button , you will see nothing but a blank screen. |
| 11 | Click the Component Presentations tab. | A blank page with a Component column |
| | | header and a Template column header is |
| | | displayed. |

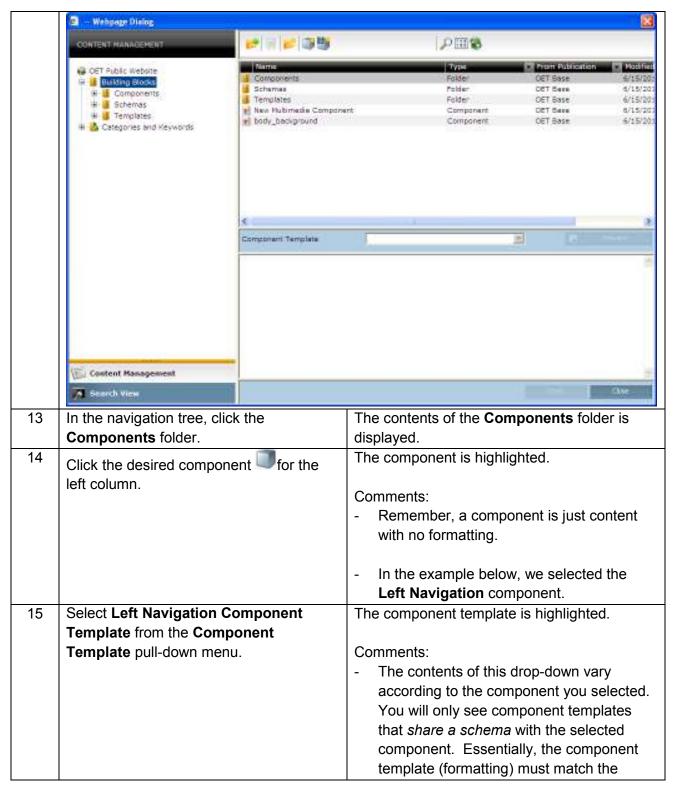














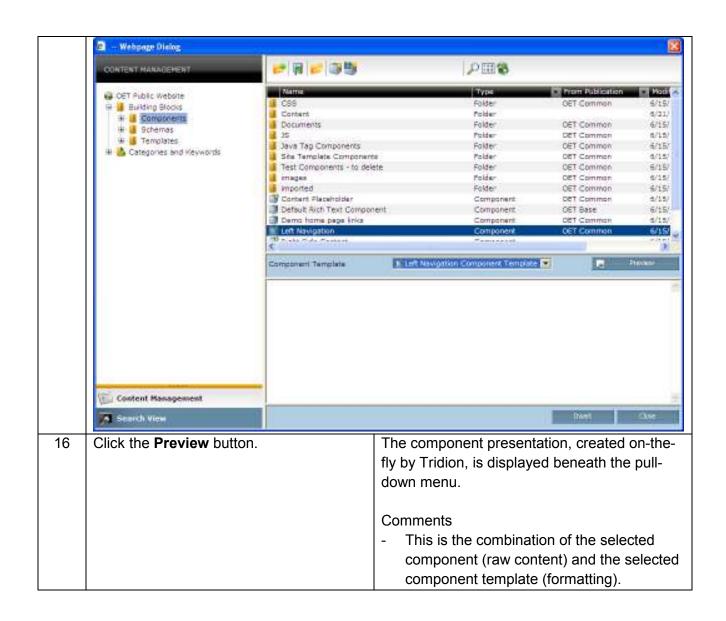


component (actual content).

- As of this document's publication, the following component templates for pages are available:
 - #Main# Richtext Component Template
 - #Right# Richtext Component Template
 - #Right# featured links sidebar component template
 - Left Navigation Component Template
- In the OET implementation, the template name ("Main", "Right", etc.) indicates where the component will appear in the web page.
- IMPORTANT: You must select only component templates appropriate for the page template you selected when you first created the page. For example, this page uses the Content With Left Nav page template, which, as the name implies, has a left navigation column but does not have a right column. If you select the #Right# Richtext Content Component Template, the page template has no place to put the component presentation, and it simply will not appear.

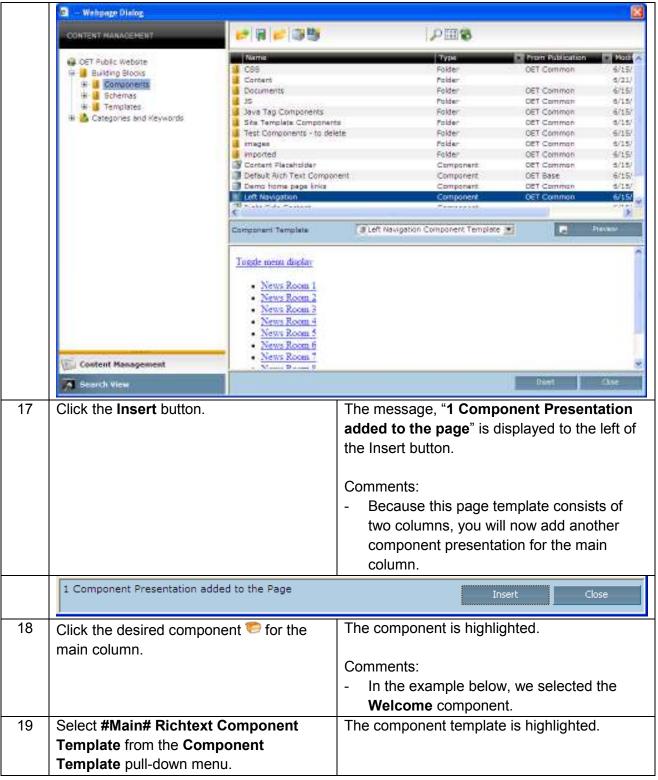






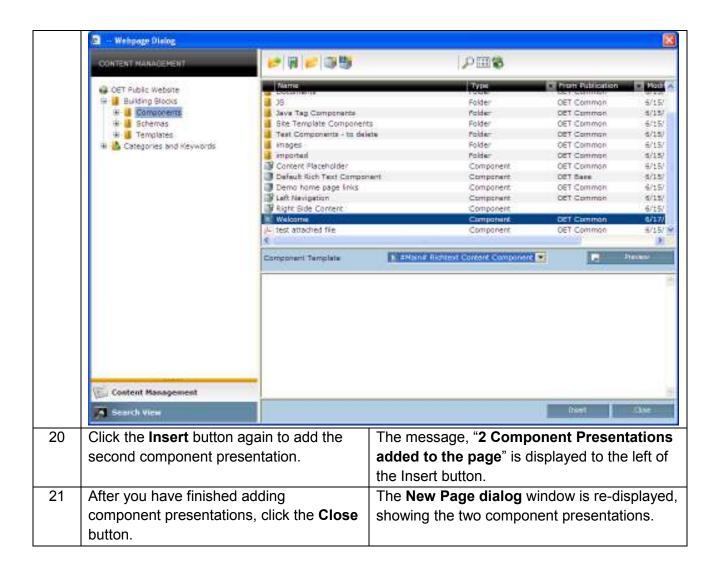






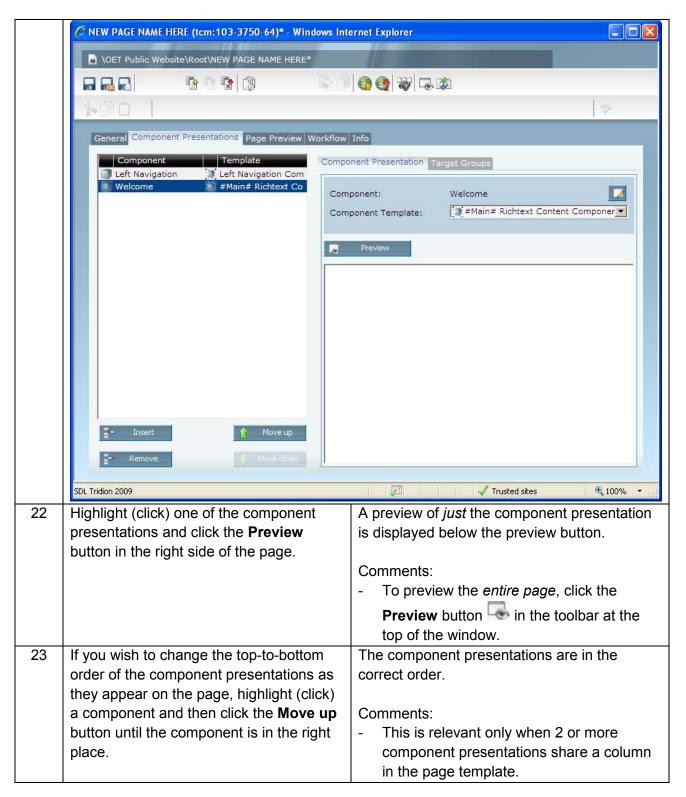






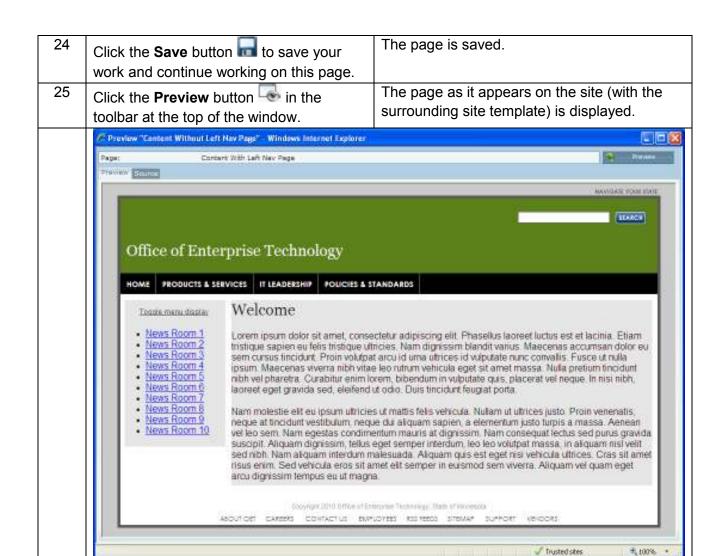
















12 How to Create a "Two Column Content With Left Nav Page" Page

User Roles: Editors and Approvers

The following graphic shows the format for this page without the surrounding site template.

| Toggle menu display | Welcome |
|--|---|
| Newsroom | Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt. Proin volutpat arcu id urna ultrices id vulputate nunc convallis. Fusce ut nulla ipsum. Maecenas viverra nibh vitae leo rutrum vehicula eget sit amet massa. Nulla pretium tincidunt nibh vel pharetra. Curabitur enim lorem, bibendum in vulputate quis, placerat ve neque. In nisi nibh, laoreet eget gravida sed, eleifend ut odio. Duis tincidunt feuciat porta |

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus laoreet luctus est et lacinia. Etiam tristique sapien eu felis tristique ultricies. Nam dignissim blandit varius. Maecenas accumsan dolor eu sem cursus tincidunt.

Remember:

- A page combines an existing **page template**, existing **components** (components are the raw content), and existing **component templates**.
- During the course of creating a page, you will select an existing component template for each component you want to add to your page. In so doing, you will create component presentations. However, component presentations don't exist as actual items within Tridion. Instead, they are created "on the fly" by Tridion when the page is displayed.
- As an aside, component templates, which provide the formatting for a component, are based on the same schemas upon which the components are based. This makes sense when you think about it; the formatting must match the actual content.

| Step | Action | Result / Comments |
|------|--------------------------------|---|
| 1 | In the Left Pane, navigate to: | The Root structure group is highlighted, and |
| | OET Public Website > | the contents of the structure group are |
| | Root | displayed to the right. |
| | | Comments: - In the From Publication column, notice that many of the components are "from" the OET Common publication. This is an |





example of blueprinting.

 As of this document's publication, the OET Public Website publication is based largely on the OET Common publication.



2 Right click the **Root** structure group and select:

New... > Page

The **New Page** dialog window is displayed.

- You may also click the New Page button in the toolbar.
- As of this document's publication, the Root structure group contains all of the pages. In the future, sub-structure groups may be created.
- The following tabs are displayed in the window.
 - The General tab enables you to enter content in the following required fields:
 - Name how the page will be referenced within Tridion;
 - File name how the page will appear in a web browser's URL; and
 - Page Template governs the overall structure of the page.



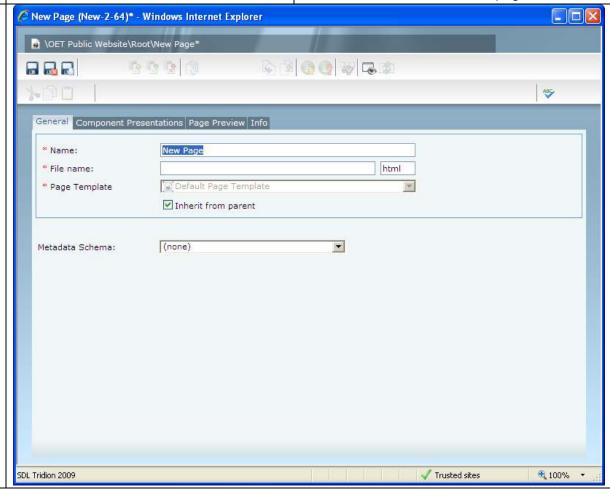


The Component Presentations tab enables you to select

- The components (content) and
- The accompanying component templates (formatting for the component)

that you want to include on the page.

The Info tab shows technical information for the page.







| | In the Name field autouthe name of the | Community |
|---|--|--|
| 3 | In the Name field, enter the name of the | Comments: |
| | page. | - You may use spaces. |
| | | - This text determines the name of the page |
| | | . • |
| 4 | In the File name field enter the file name | within the Tridion system. |
| 4 | In the File name field, enter the file name | Comments: |
| | of the page. | - You must enter a valid file name; do not |
| | | include spaces or special characters. |
| | | - This text determines how the page will be |
| | | |
| | | Referenced within page links and |
| | | Displayed within a web browser's |
| | | URL. |
| 5 | Uncheck the Inherit from parent | The previously grayed-out Page Template |
| | checkbox. | pull-down menu is activated. |
| 6 | Select Two Column Content With Left | Two Column Content With Left Nav Page |
| | Nav Page Template from the Page | Template is displayed in the pull-down menu. |
| | Template pull-down menu. | |
| | | The extension to the right of the File name |
| | | field changes to .jsp. |
| | | |
| | | Comments: |
| | | - Within the OET Tridion implementation, |
| | | the role of the page template is to simply |
| | | organize the content. |
| | | - As of this document's publication, three |
| | | page templates have been created: |
| | | ○ Content Without Left Nav Page |
| | | Template, |
| | | Content With Left Nav Page |
| | | Template , and |
| | | Two Column Content With Left |
| | | Nav Page Template. |
| 7 | Select Dublin Core Metadata Schema | Dublin Core Metadata Schema is displayed |
| | from the Metadata Schema pull-down | in the pull-down menu, and several new fields |
| | | |
| | menu. | pertaining to the page's metadata are |

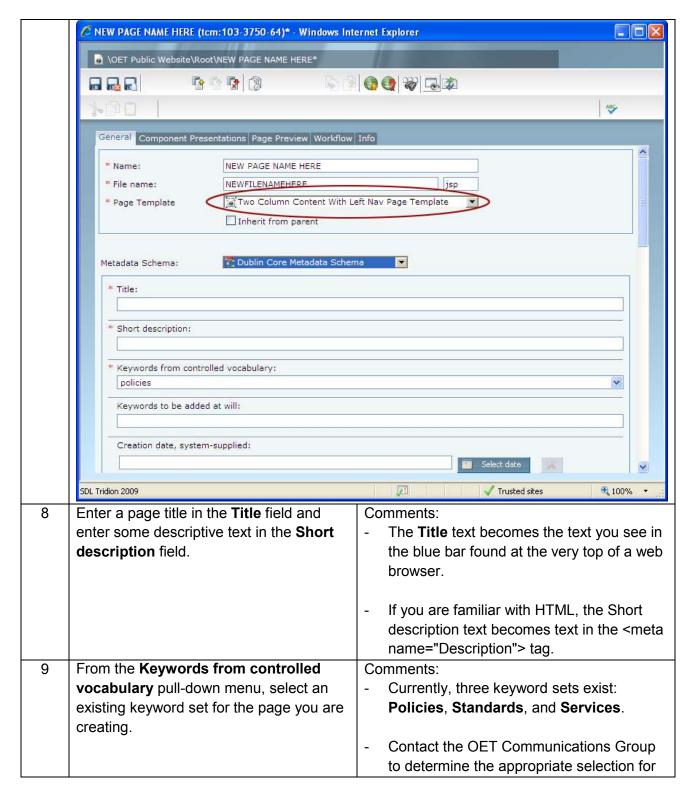




- The Metadata schema has nothing to do with the Tridion schemas used in the creation of components.
- Metadata is "information about information," or, in this case, information about web page. Web page metadata is used by programs on the Internet to better classify web pages. Generally, metadata is hidden from users.
- A metadata schema is optional. If you don't want a schema, simply leave it as (none).
- Only the following five fields are required, and three of them are already filled out:
 - o Title;
 - Short description;
 - Keywords from controlled vocabulary (pre-selected from a drop-down list);
 - OET as default; can be changed (filled out);
 - o Use ISO 639-2 format (filled out).







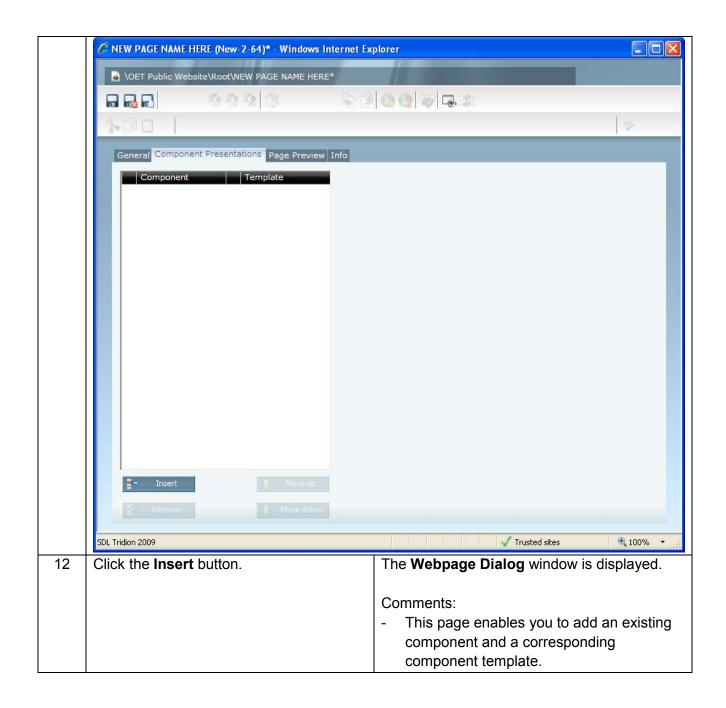




| | | vour page |
|----|---|---|
| 10 | Click the Save button to save your work and continue working on this page. | your page. Your work is saved. Comments: - The Save button is the left-most button in the "Save" button set. - At this point you have created just the |
| | | framework for a new page. Now you must fill it in with content, that is, add components and corresponding component templates. In fact, if you click the Preview button you will see |
| | | nothing but a blank screen. |
| 11 | Click the Component Presentations tab. | A blank page with a Component column |
| | | header and a Template column header is |
| | | displayed. |

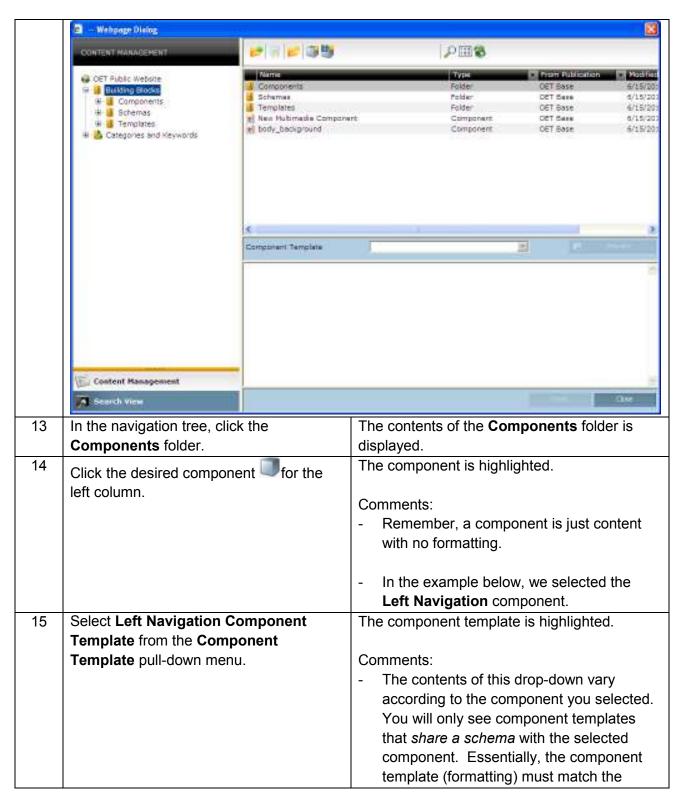












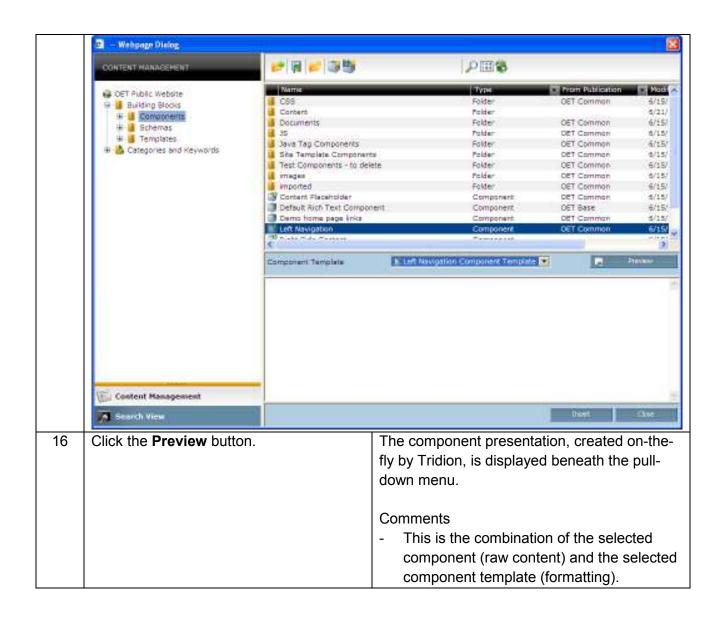




| component (actual content). |
|--|
| - As of this document's publication, the following component templates for pages are available: o #Main# Richtext Component Template o #Right# Richtext Component Template o #Right# featured links sidebar component template o Left Navigation Component Template |
| - In the OET implementation, the template name ("Main", "Right", etc.) indicates where the component will appear in the web page. |
| - IMPORTANT: You must select only component templates appropriate for the page template you selected when you first created the page. |

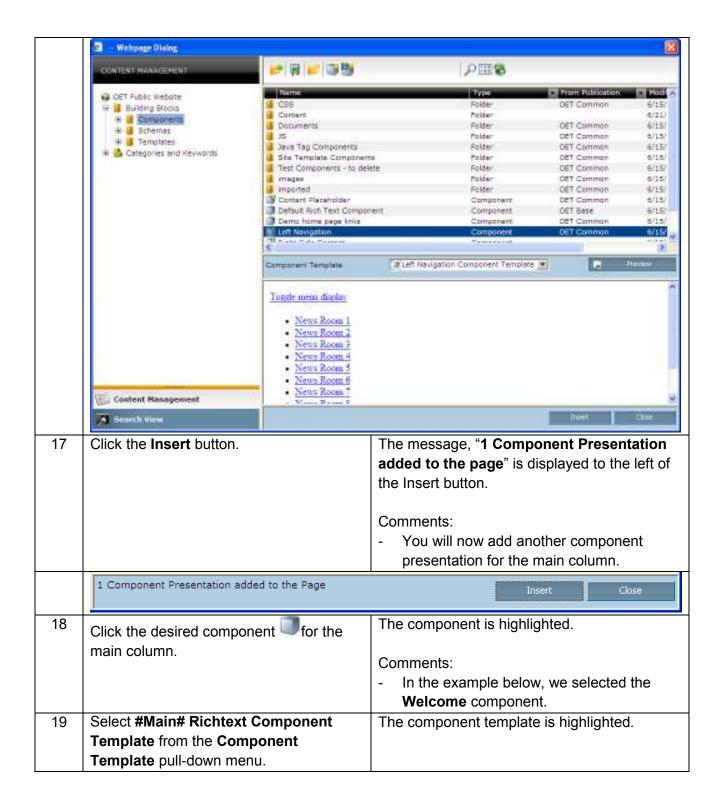






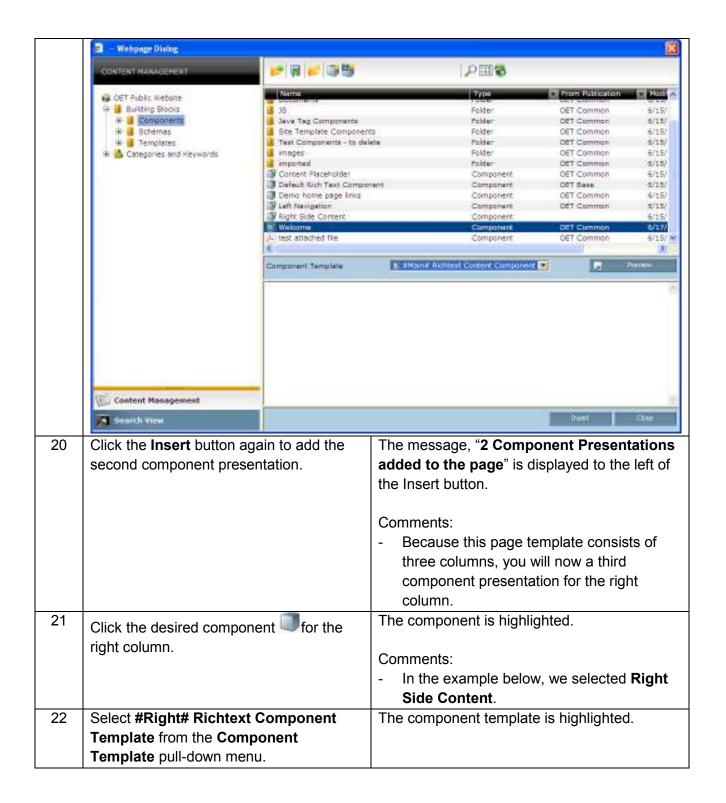






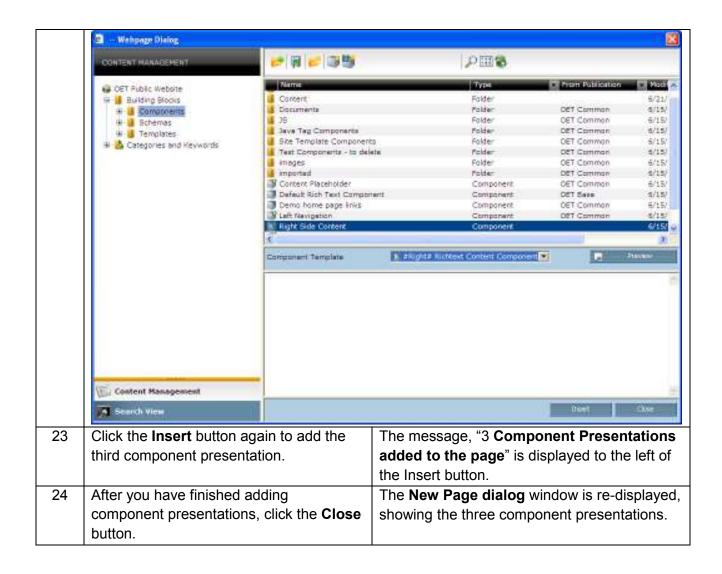






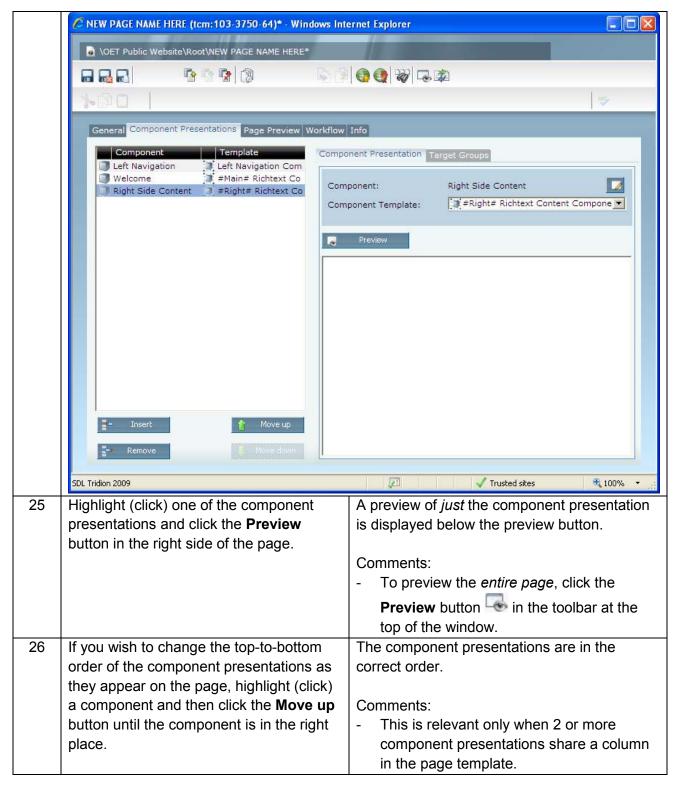






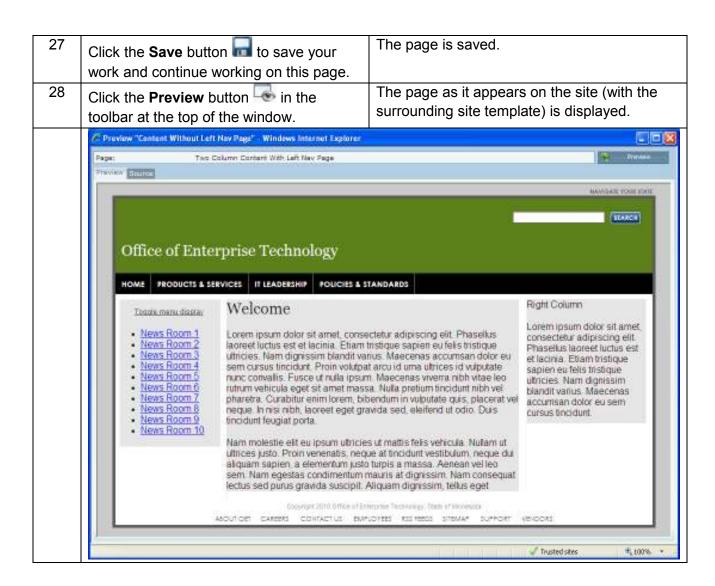
















13 How to Edit a Page

User Roles: Editors and Approvers

The fields displayed when editing a page are the same as those found when creating a new page. However, when editing a page, some new tabs and functionality are introduced.

| Step | Action | | Result / Comments | | | |
|------|---|------------------|--|--|--|--|
| 1 | In the Left Pane, navigate to: OET Public Website > Root | | The Root structure group is highlighted, and the contents of the structure group are displayed to the right. | | | |
| | F VDET Fiber Website/Boot | | I Serve trus Monday, June 21, 3013 to 34 | | | |
| | CONTENT MANAGEMENT | | 00 × 0 × 0 × 0 × 0 0 × 0 0 0 0 0 0 0 0 | | | |
| | Content Management # Q Ostom Pages # Q OET Base # Q OET Public Website # Building Blocks # Building Blocks # Cattering Without Left New Page # Two Column Centent With Left New Page # Cattering Column Centent With Left New Page # Cattering Queue | | Type | | | |
| 2 | Double-click the page y | ou wish to edit. | The Edit Page dialog window is displayed, | | | |
| | Double-click the page you wish to edit. | | and the content fields display the existing content. Comments: You may also right-click the page and select Open. A lot goes on in this window, and to facilitate readability, the Comments will be continued in a single column, below. | | | |
| | Comments (continued from above): As with the New Page window, this window has General, Component Presentation, and Info tabs. New tabs include Workflow and Statistics. The Workflow tab shows information pertaining to the workflow established for this item. | | | | | |





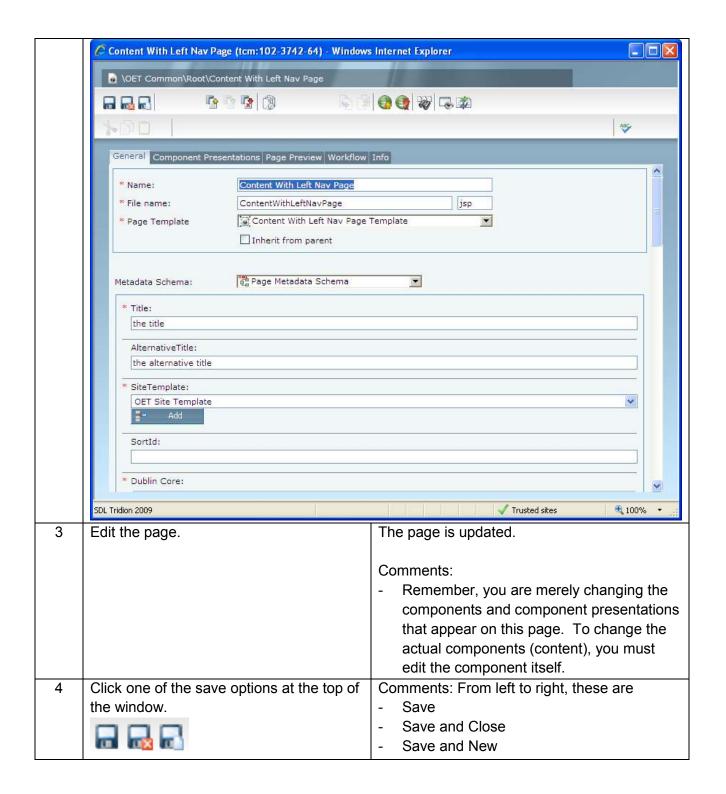
- The Statistics tab shows visitation information for this item. Tridion provides several ways for you to modify the results including time frame and types of visitors.
- In the top row, several buttons that were grayed out when adding a new page are now available. These include:
 - Check-in checks-in the page, after which you can no longer make changes, although the window remains open.
 - Undo Check-out checks-in the page, after which you can no longer make changes, although the window remains open.
 - History list shows a list of the versions of the page.
 - Publish enables Editors and Approvers to publish pages. This will be discussed in detail later in this document.
 - Unpublish enables Editors and Approvers to unpublish pages. This will be discussed in detail later in this document.

Note: In the OET implementation, Editors can publish pages to just the stage delivery server, and Approvers can publish pages to both the stage delivery server and the live server.

- Show Where Used shows the publications in which the page is used, where the page is published, and a graphical BluePrint Hierarchy.
- Preview shows a preview of the page.
- Compare a- shows differences between two different versions of the page.











14 How to Retrieve a Version of a Component or Page

User Roles: All

Every time you save changes to a component or a page, Tridion creates a new version of that item. 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.

Importantly, if you realize you've made a mistake, you can retrieve an older version and make it the current version.

| Step | Action | Result / Comments | | |
|------|---|---|--|--|
| 1 | Within a folder or structure group, navigate to the item for which you want to retrieve an older version. | The item is displayed. | | |
| 2 | Right-click the item and navigate to: Versioning > History | History is highlighted. Comments: - The Versioning menu is available in other locations within Tridion. For example, this menu is also available for items under My Tasks. | | |
| | Open Open Open with WebDAV Versioning BluePrinting Publishing Preview Cut Copy Delete Where Used Classify Welcome | Type Folder Component Component Component Component Component Component Component Component | | |
| 3 | Click History . | A History window is displayed showing all the versions for the item. | | |





Comments:

 When you retrieve an older item, you will make it the current item and move it down the version list.

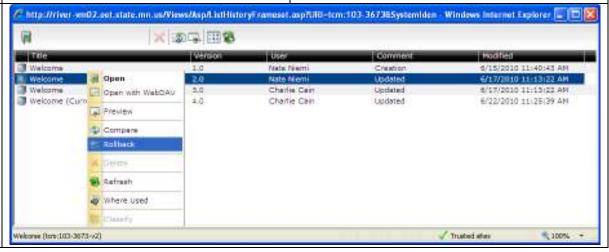


4 Right-click the item you want to retrieve.

A menu is displayed containing **Rollback** and **Compare** options.

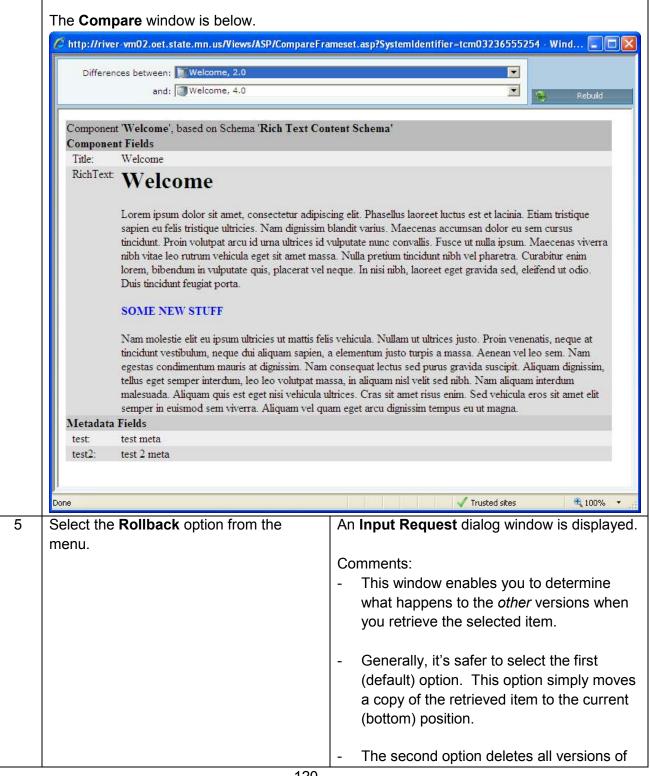
Comments:

- If you aren't exactly sure which version you want to retrieve, click the Compare option to display a new window that enables you to easily see the differences between two versions.
- Differences between versions are highlighted in blue.
- You may also click the **Compare** button in the Toolbar.



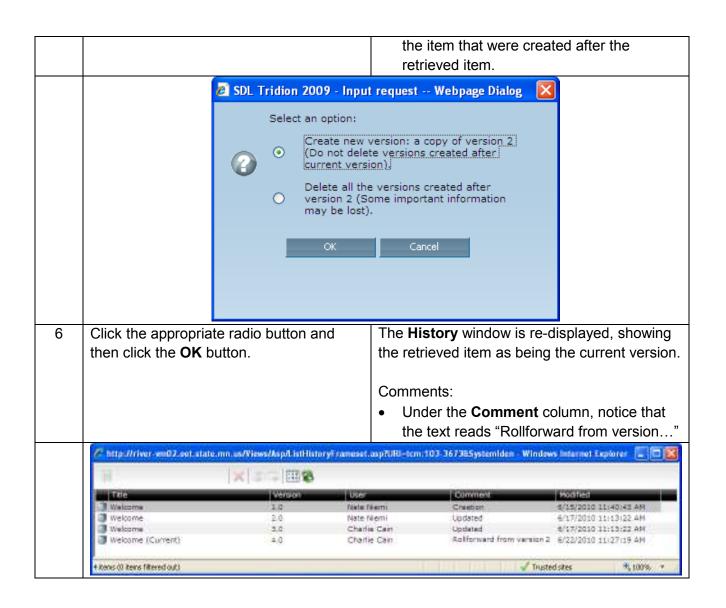
















15 How to Perform a Search

User Roles: All

- The Left Pane shares space with the Tridion Search, and to toggle between the two, simply click on the **Tree view** and **Search** buttons.
- A useful shortcut is to click the graphical search button in the Toolbar. This automatically toggles to the Search view and loads the current folder/structure group into the **Search in:** field.
- The Tridion Search provides both a General and Advanced interface. When performing a General search, criteria entered in the **Search for:** field searches against text in the **Name** column of the Working Area.
- You may use the following wildcards:
 - o Asterisk (*) allows for any number of characters to replace the "*" wildcard, and
 - Question mark (?) allows one character to replace the "?" wildcard.
- By default, searches are not case-sensitive.
- You may use the following operators (examples follows the operators):
 - AND car AND park returns items containing both the words "car" and "park", in any
 order and with any words in between.
 - OR car OR park returns items containing the words "car" or "park".
 - NOT car NOT park returns items containing the word "car" but not "park".
 - CASE <case> PaRk returns items containing the word "park" with a capital "P" and a capital "R".
- To search for an exact string of text, put the text in quotes. For example, searching for "Main Page" would return an item named "Main Page" but not "Main Products Page".
- Since the General search is largely self-explanatory, the following procedure will cover the Advanced Search.





| Step | Action | Result / Comments |
|------|--|---|
| 1 | Navigate to the folder or structure group in which you want to perform the search. | The folder/structure group is highlighted. |
| 2 | - Click on the Search button at the bottom of the Left Pane Content Management | The Search view is displayed in place of the Left Pane. |
| | E-mail Management Web Site Management | |
| | Search View System Administration My Tasks | |
| | or - Click on the Search button in the Toolbar. | |
| 3 | Using the Browse to button ., navigate to the desired search area. | The Search in: field shows the area to be searched. |
| | | - This setting will still be in force if you perform an advanced search (the advanced search does not show this field). |
| | | - By default, the Include subfolders checkbox is selected. You can deselect this at any time. |
| 4 | Click the Advanced tab. | The Advanced search form is displayed. Comments: This tab enables you to enter additional search criteria and further narrow the search results. |
| | | - If you click a checkbox, additional fields |

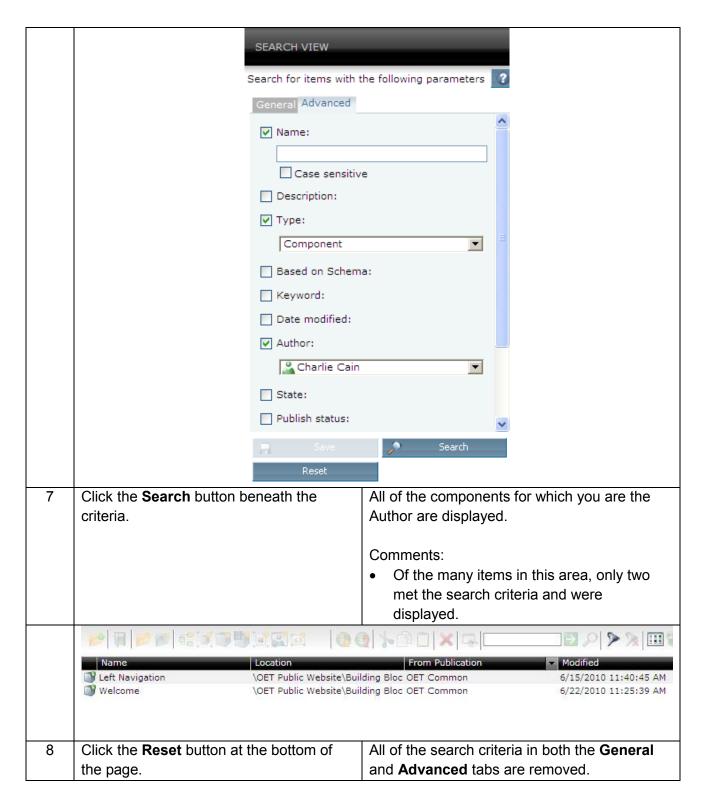




| | | are displayed that enable you to refine the search. In addition to the Name: field, the Author: and Type: fields are quite useful. At any time, you can return to the General tab and change the Search in: and Include subfolders criteria. When you return to the Advanced tab, all the criteria you previously entered will still be displayed. |
|---|---|--|
| | SEARCH VIEW | |
| | Search for item | s with the following parameters |
| | General Adva | nced |
| | ✓ Name: | |
| | | |
| | ☐ Case s | |
| | Descriptio | n: |
| | ☐ Type: | |
| | ☐ Based on | |
| | Keyword: | |
| | Date mod | iriea: |
| | Author: | |
| | State: | atus: |
| | ☐ BluePrintii | |
| | □ Workflow: | |
| | ✓ Number o | |
| | 100 | |
| | | Sauch |
| | Reset | |
| | | |
| 5 | Click the Author : checkbox and select | Your name is displayed in the Author: field. |
| e | your name from the pull-down menu. | Component is displayed in the Type field |
| 6 | Click the Type : checkbox and select | Component is displayed in the Type: field. |
| | Component. | |











16 How to Assign a Workflow to Components

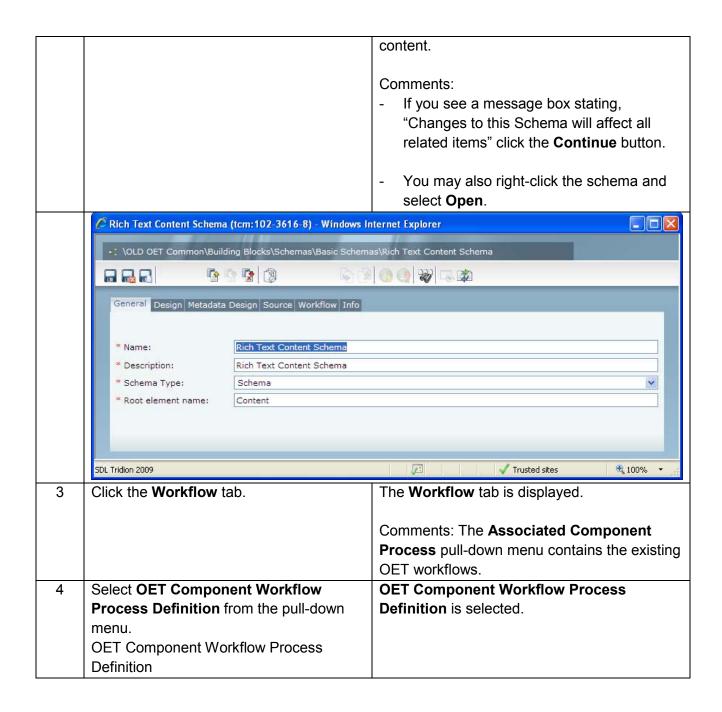
User Roles: Editors and Approvers

- As of this document's publication, two workflows have been created, one for components and another for pages.
- The workflow for components is called **OET Component Workflow Process Definition**.
- Both of these workflows pertain to publishing to the stage delivery server. There are no workflows for publishing to the live server because this process involves only one person, the Approver.
- A schema defines the fields and field types for particular types of content. To ensure consistency, components are based on schemas.
- When assigning a workflow to components, you will assign the workflow to the schema upon which the components are based. In fact, all new components based on that schema will automatically be assigned to that workflow.

| Step | Action | Result / Comments | | |
|------|--|---|--|--|
| 1 | In the Left Pane, navigate to: | The Basic Schemas folder is highlighted, and | | |
| | OET Public Website > | the contents of the folder are displayed to the | | |
| | Building Blocks > | right. | | |
| | Schemas > | | | |
| | Basic Schemas | Comments: | | |
| | | - These schemas form the basis of the | | |
| | | current Tridion implementation. | | |
| | Contant Management Custom Pages Custom Pag | No. No. | | |
| 2 | Double-click the schema to which you want to assign the workflow. | The Edit Schema dialog window is displayed, and the content fields display the existing | | |

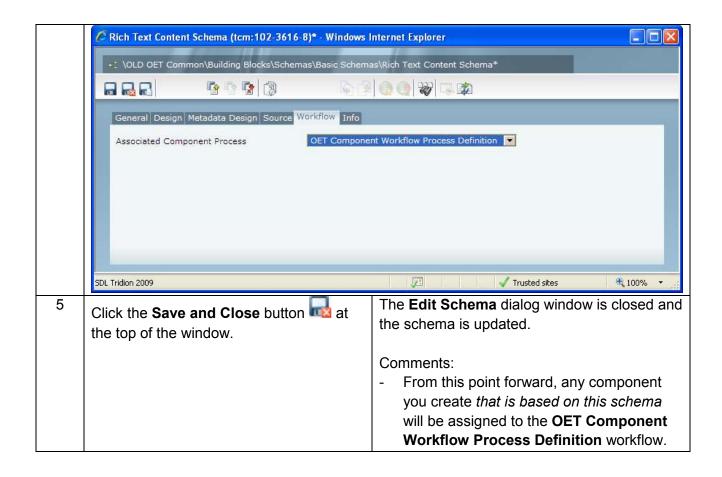
















17 How to Assign a Workflow to Pages

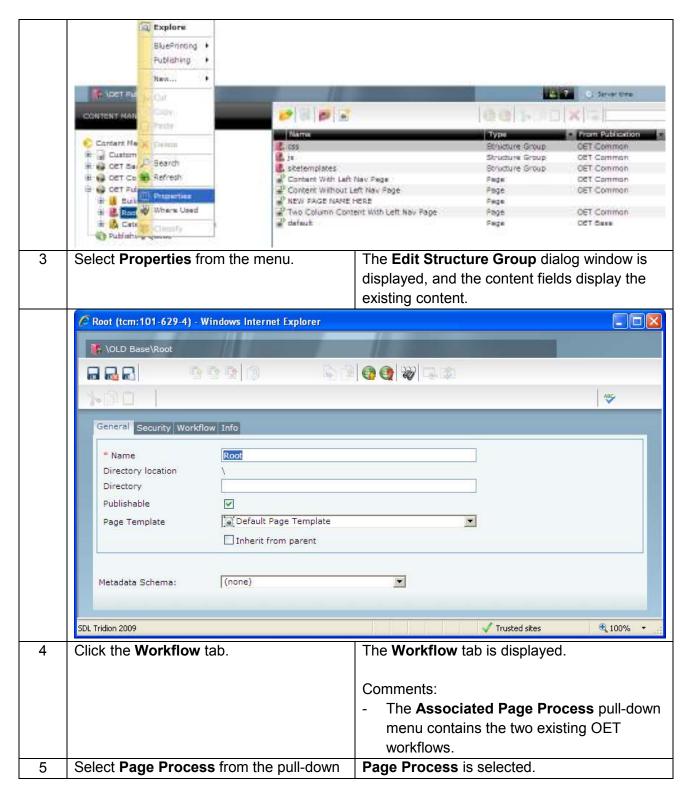
User Roles: Editors and Approvers

- As of this document's publication, two workflows have been created, one for components and another for pages.
- The workflow for pages is called Page Process.
- Both of these workflows pertain to publishing to the stage delivery server. There are no workflows for publishing to the live server because this process involves only one person, the Approver.
- A structure group in Tridion is equivalent to a folder in the actual website. Content
 Authors use structure groups to organize, manage, and provide a URL structure for
 pages.
- When assigning a workflow to pages, you will assign the workflow to the structure group containing the page. In fact, all new pages found in that structure group will automatically be assigned to that workflow.

| Step | Action | Result / Comments | | | |
|------|---|---|--|--|--|
| 1 | In the Left Pane, navigate to: | The Root structure group is highlighted, and | | | |
| | OET Public Website > | the contents of the structure group are | | | |
| | Root | displayed to the right. | | | |
| | | | | | |
| | | Comments: | | | |
| | - This structure group contains the page 1 | | | | |
| | | which you will assign the workflow. | | | |
| 2 | Right-click on the Root structure group. | A Right-click menu is displayed. | | | |

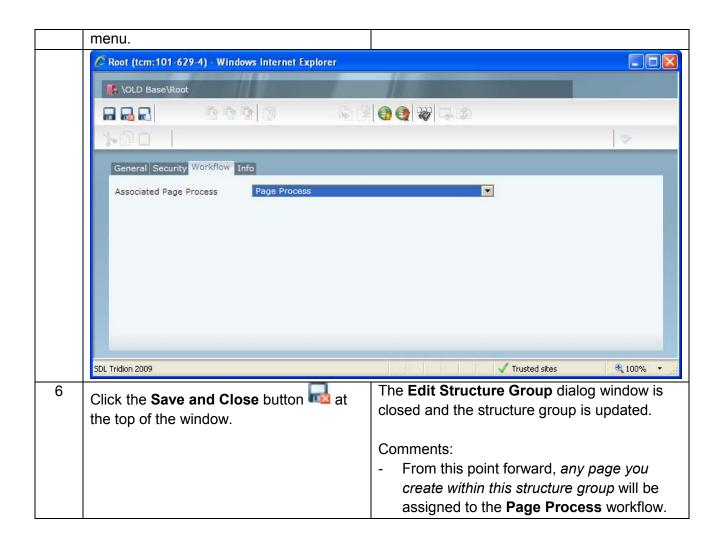
















18 How to Approve a Page

User Roles: Approvers

- Approval is a part of OET workflows and is performed solely by Approvers.
- Prior to a page being included in the Approver's Assignment list in the workflow, the
 page will have been reviewed by an Editor and "Approved for Publish" (from the Editor's
 perspective).
- Generally, the next step is the Approver publishing the approved page to the stage delivery server. Here, it will be reviewed by Communications Department (or other) personnel. If OK'd, the Approver will then publish the page to the live server.

| Step | Action | Result / Comments | | |
|------|---|---|--|--|
| 1 | In the Left Pane, navigate to: My Tasks > Assignment list | An Assignment list containing a wide variety of items including pages and components is displayed. Comments: Because you logged in as an Approver, this Assignment list is specific to the Approver role. | | |
| | Name Name | GET Common RIVER-VMG2/allashnin | | |
| 2 | Right-click the page and select Start Activity from the menu. | Tridion moves the page from Assignment list to Work list . | | |
| 3 | In the Left Pane, navigate to Work list and double-click the page. | A working window containing the selected page is displayed. Comments: | | |





| | You may also right-click the page and select Open. This is the same as double-clicking the page. In these cases, after you finish working on the item, the system will automatically check the item back in. You may also right-click the item and select Versioning > Check-out to explicitly check-out the item. Now, it will remain checked-out until you manually check it back in or save/close the item. Regardless of the method used to open the item, the page is now "locked" and cannot be worked on by other users. |
|--|--|
| Click the Preview sutton. | A Preview window showing the page is displayed. |
| Review the page and then close the window. | The window is closed, and the working area is displayed. |
| If the page is OK, right-click the page and select Finish Activity from the menu. | The Finish Activity dialog window is displayed. |
| Select Process Complete . | Tridion removes the page from the Approver's Work list and approves the page for publication. Comments: - Because you are the Approver (the last person in the workflow), the page has now completed its journey through the Tridion workflow. - The page must still be manually published to the stage delivery server. |
| n the Left Pane, navigate to: OET Public Website > Root | The Root structure group is highlighted, and the contents of the structure group are displayed to the right. |
| | Review the page and then close the vindow. If the page is OK, right-click the page and elect Finish Activity from the menu. Select Process Complete. In the Left Pane, navigate to: DET Public Website > |





| | NOET Fublic Webstel/Root | | | I fave the | Monday, June 21, 3010 12:34 | |
|----|---|--|--|--|---|--|
| | CONTENT HANAGEHENT | ● ■ ● ■ | 00 - 1 | X | ■ P > M 回8 # | |
| | Contert Namagement □ Custom Pages □ OET Base □ OET Common □ OET Public Website □ Building Blocks □ Building Blocks □ Categories and Keywords □ Publishing Queue | Forms Example to the property of the property | Structure Strong Structure Strong Structure Strong Structure Excup Flage Flage Flage Flage Flage Flage Flage | From Follossian OET Common OET Common | #15/2010 11:41:45 AM 6/15/2010 11:41:45 AM 6/15/2010 11:41:45 AM 6/15/2010 11:41:55 AM 6/15/2010 11:41:55 AM 6/15/2010 11:41:55 AM 6/15/2010 11:41:55 AM 6/15/2010 11:43:33 AM | |
| 9 | Double-click the page. | | The Edit Page dialog window is displayed, and the content fields display the existing content. Comments: - You may also right-click the page and select Open . | | | |
| 10 | Click the Workflow ta | o. | The Workflow tab is displayed. | | | |
| 11 | Verify that the Approval status is Approved for Publish. | | Comments: - The Tridion system automatically char the Approval Status when you select Finish Activity, above. - Now that the page has been fully approved, Editors and Approvers can publish the page to the stage delivery server (but not to the live server). | | | |





19 How to Publish a Page to a Server

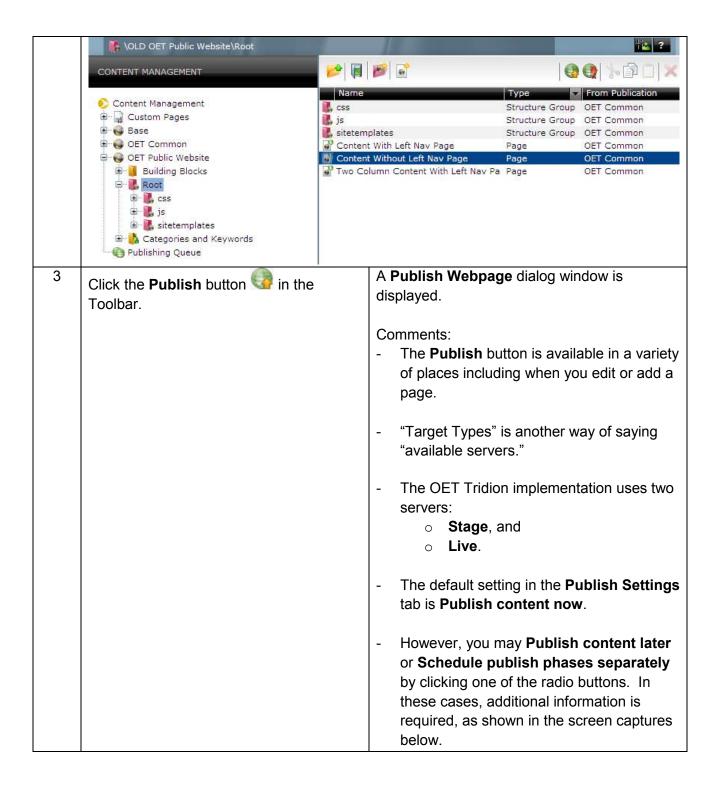
User Roles: Editors and Approvers

- The OET server environment consists of two servers: a stage delivery server and a live server.
 - The stage delivery server enables OET personnel, such as those in the Communications Department, to preview content before final publishing to the live server.
 - The live server delivers the OET website to the public.
- Publishing takes place on both servers. However,
 - o Editors and Approvers (not Authors) can publish to the stage delivery server, and
 - Only Approvers can publish to the live server.
- Both of the OET workflows pertain to publishing to the stage delivery server.
- There are no workflows for publishing to the live server because this process involves only one person, the Approver.
- Under certain circumstances, the Approver can simultaneously publish to both the live and stage delivery servers.

| Step | Action | Result / Comments | | |
|------|--|---|--|--|
| 1 | In the Left Pane, navigate to: | The Root structure group is highlighted, and | | |
| | OET Public Website > | the contents of the structure group are | | |
| | Root | displayed to the right. | | |
| 2 | Highlight (click) the page you want to | The page is highlighted. | | |
| | publish. | | | |

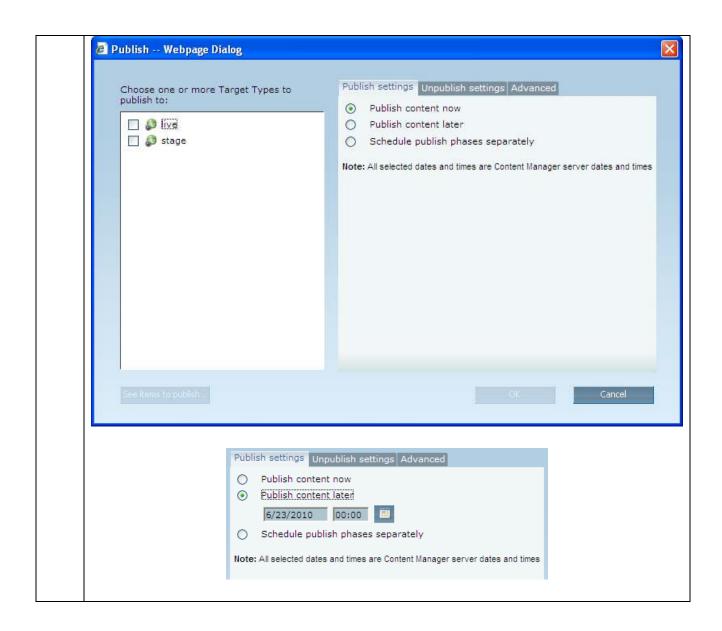






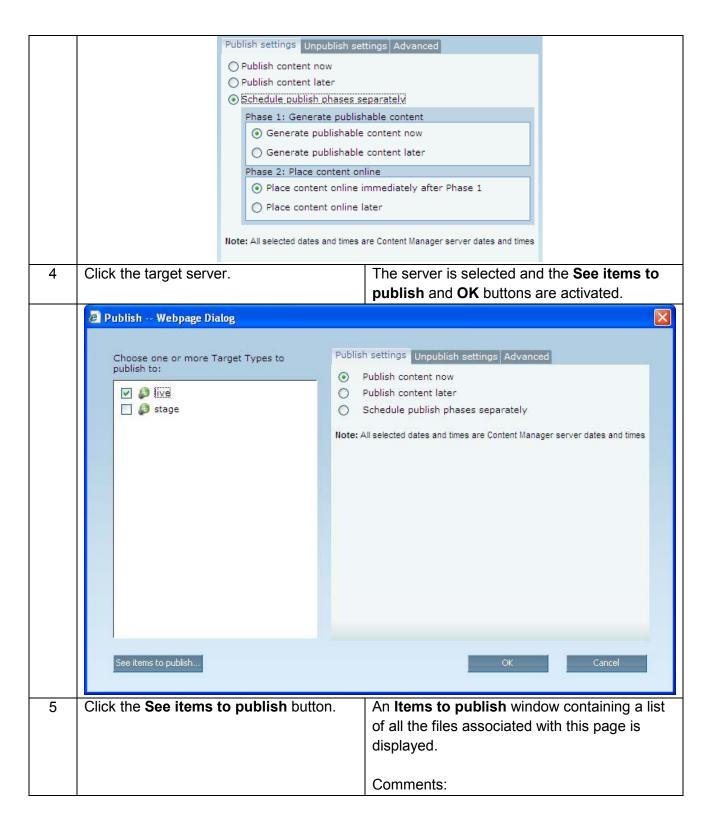












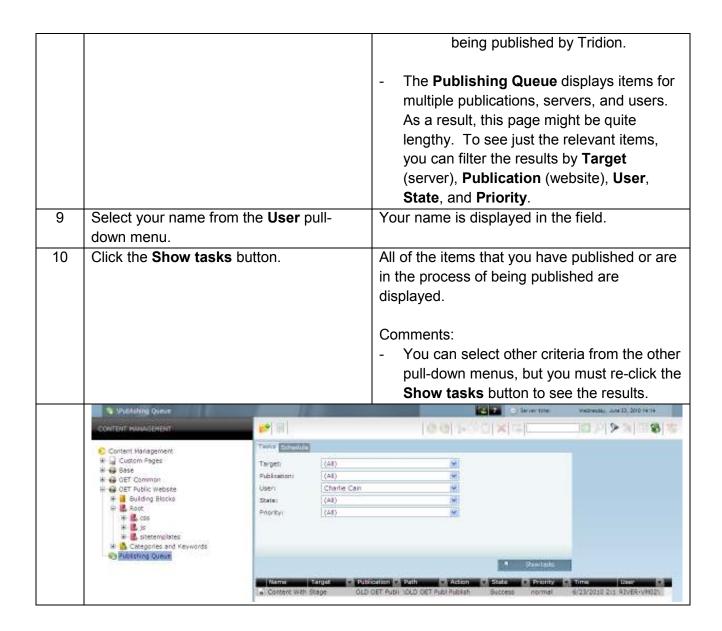




| | | - At a minimum, this list includes the page itself and the components contained within the page. |
|---|---|--|
| | Items to publish Webpage Dialog 2 items to be published Name Content Without Left Nav Page Welcome Live | Location \OET Public Website\Root \OET Public Website\Buildin |
| | | Close |
| | _ | |
| 6 | Review the items and click the Close button. | The Items to publish window is closed, and you are returned to the Publish Webpage window. |
| 7 | Click the OK button. | The Publish Webpage window is closed, and the page is published to the server you selected. Comments: - Actually, the page may not be published immediately. In Tridion, "published" pages are first sent to a publishing queue. At an appropriate time, Tridion actually publishes the files to the server. Tridion does this to better manage system and bandwidth resources. |
| 8 | Click the Publishing Queue button at the bottom of the Left Pane. | The Publishing Queue is displayed. Comments: This page enables you to see Items that have been published, Items that are scheduled to be published (under the Schedule tab), and |











Appendix A: Content Manager Explorer Icons

| lcon | Description | Location Bar | Main Toolbar | Edit Window Toolbars | Navigation Pane |
|--------------------|--|-----------------|-----------------|----------------------------|--------------------|
| † †~ | User Preferences | Х | | | |
| ? | Online | Х | | | |
| | Documentation | | | | |
| SDL tridion | About Tridion SDL | X | | | |
| | Go to Parent | | | | |
| * | My Tasks | | | | |
| 0 | Publish Queue | | | | Х |
| | Check-in | | | Х | |
| | Check-out | | | Х | |
| | Undo Check-out | | | Х | |
| | Version History List | | | X | |
| | Compare Versions | | | Х | |
| | Rollback to a Previous Version | | | Х | |
| \$ | Localize a Shared Blueprint item | | | Х | |
| > | Unlocalize a Local Copy of a Blueprint item | | | Х | |
| E. | Where Used | | | Х | |
| 6 | Schemas | | Х | | |
| | Components | | X | | |
| | Multimedia Components General Icon (are displayed using the icon for the multimedia type that they contain). | | X | | |
| | Component | | Х | | |





| | Templates | | | |
|----------|---------------------------|---|---|---|
| | Page Templates | Х | | |
| • | Pages | X | | |
| [| Open | X | | |
| 8 | Refresh | X | | |
| 0 | Search | X | | |
| € | Search based on a URI | Х | | |
| | Preview | X | | |
| | Advanced list filter | X | | |
| A. | Undo advanced list filter | Х | | |
| (| Publications | X | | Х |
| | Folders | X | | Х |
| 1 | Structure Groups | Х | | Х |
| | Save | X | | |
| | Save and Close | X | | |
| | Save and New | X | Х | |
| Jo | Cut | X | Х | |
| | Сору | X | Х | |
| | Paste | X | Х | |
| × | Delete | Х | Х | |
| | Publish | X | Х | |
| | Unpublish | X | Х | |





Appendix B: Content Manager Explorer Keyboard Shortcuts

Left 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 tree view. |
| 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 | Cuts the selected node. |
| Ctrl+C | Copies the selected node. |
| Ctrl+V | Pastes a copied or cut note. |
| Delete | Deletes the selected node. |

Working Area

| Key | Result |
|------------|--|
| Home | Select the first item in the list |
| End | Select the last item in the list |
| Up arrow | Select the previous item in the list |
| Down arrow | 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 | Cut |
| Ctrl + C | Сору |





| Ctrl + V | Paste |
|----------|-----------------------------------|
| Delete | Delete currently selected item(s) |

Toolbar

| Key | Result |
|----------------|---|
| Left arrow | Select the previous button in the toolbar |
| Right arrow | Select the next button in the toolbar |
| Enter or Space | Execute default action |
| Escape | Clear selection |

Dialog Windows

| Options within popup or dialog | Enter | Esc |
|-----------------------------------|--------------------------------|--------|
| Yes or No | Yes | No |
| OK only | OK | OK |
| Cancel only | | Cancel |
| OK and Details | OK | OK |
| Close only | Close | Close |
| OK or Cancel | OK | Cancel |
| OK, Cancel, Message text field | Cursor is within text field | Cancel |
| OK, Cancel, Remove | OK | Cancel |
| OK, Cancel, Browse | OK | Cancel |
| OK, Cancel, drop-down menus | OK | Cancel |
| Publish, Cancel, Details | Publish | Cancel |
| Preview only | Preview | Close |
| Rebuild only | Rebuild | Close |
| Continue, Show Where Used, Cancel | Continue | Cancel |
| Open, Go to, Close | Open, if user selected an item | Close |

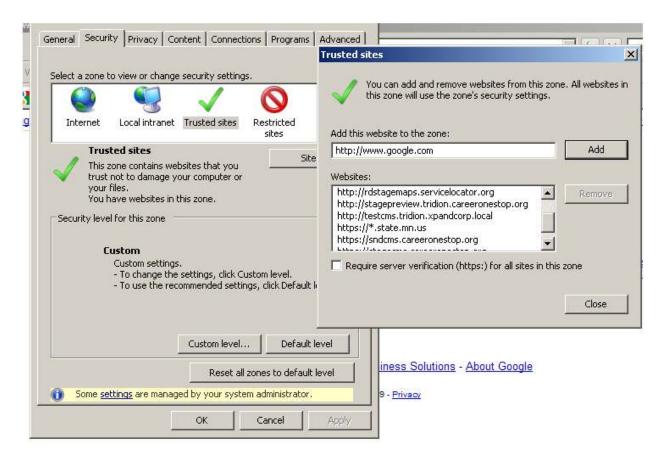




Appendix C: IE7 Security Settings

The following screen captures show IE7 security settings that are known work.

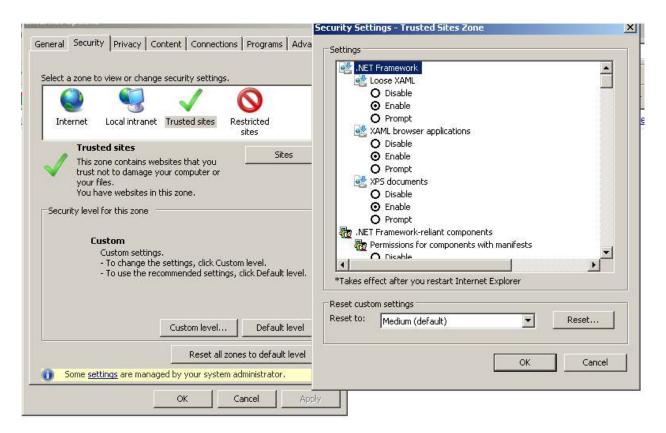
1) Add the appropriate server under **Tools > Internet Options > Security > Trusted sites**:





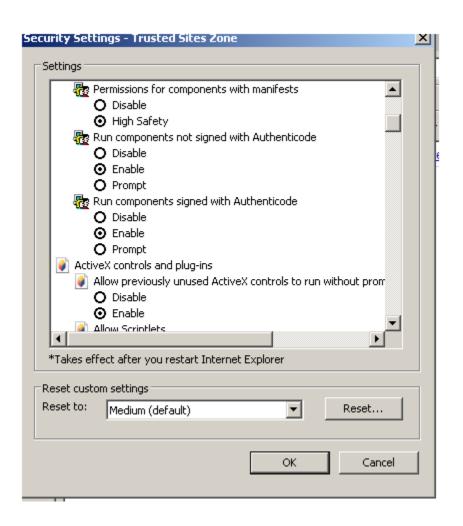


2) Check the following under Tools > Internet Options > Security > Custom level...



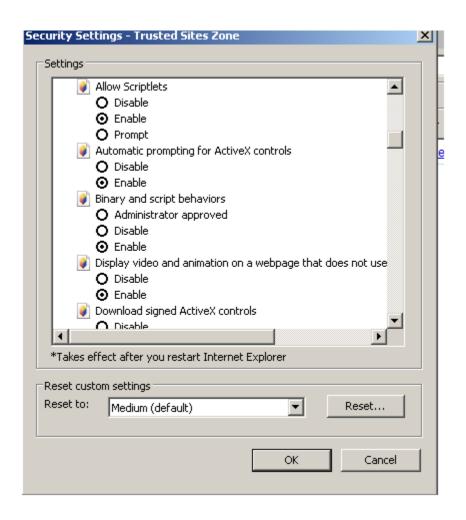






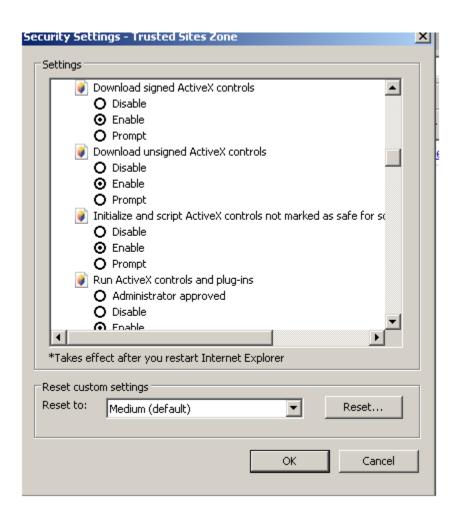






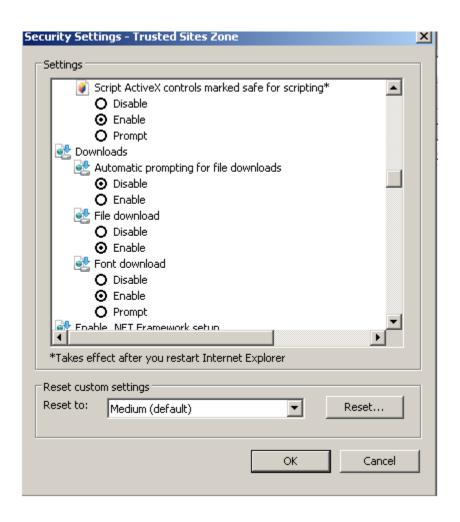






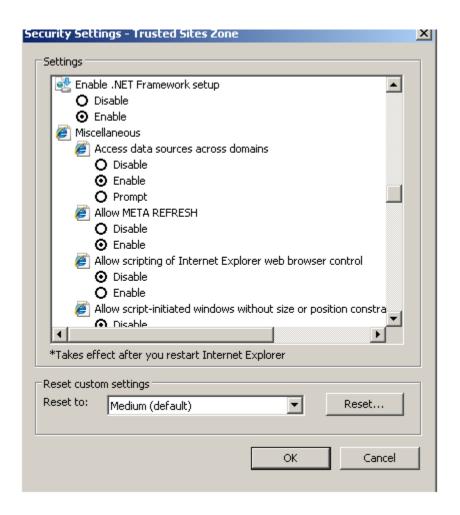






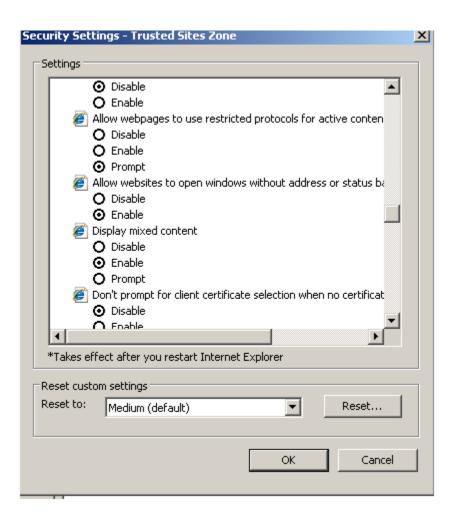






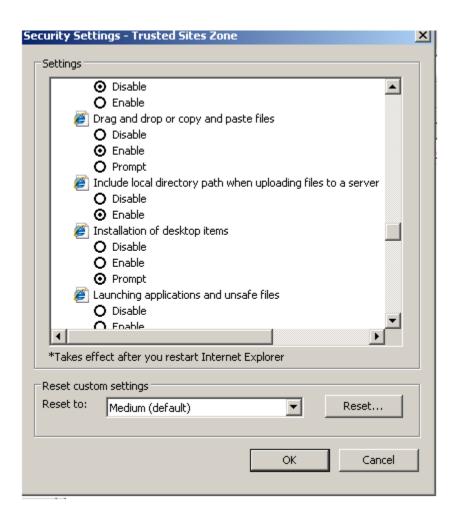






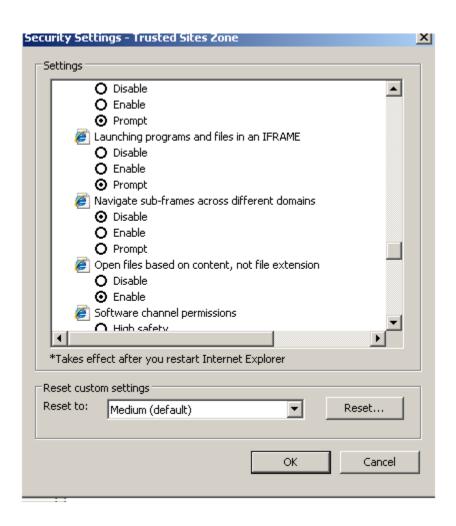






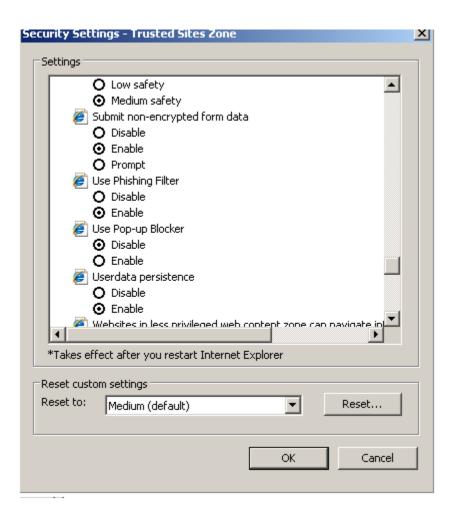






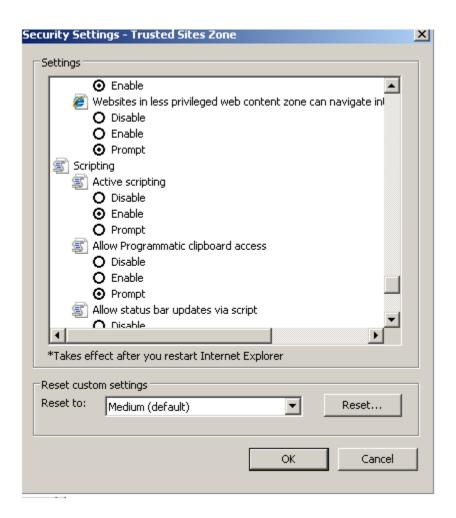






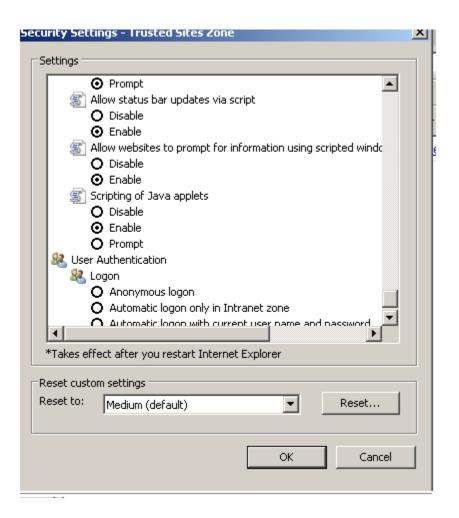






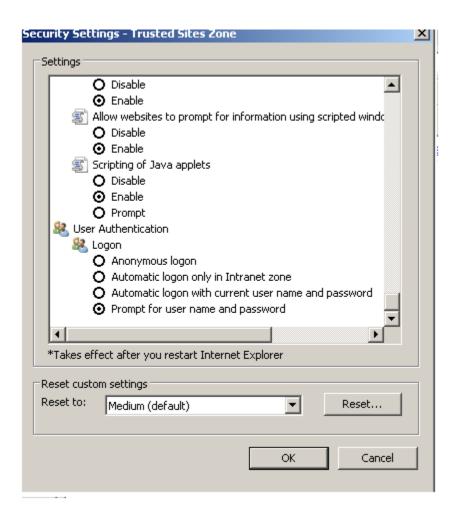
















3) Check the following in the **Tools > Internet Options > Advanced** tab:

