WCM User Guide

Version 4.0

Nstein Technologies Inc.

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Preface

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Nstein contact information

Nstein's dedicated Customer Care team is committed to providing clients with the kind of assistance that will contribute significantly to the continuing success of their businesses. We offer phone support, email support and the Web-based Support Network, as described below.

Tip

Support staff may inquire about your product version number.

To know your WCM product version number, from the WCM menu bar, choose **Help>About this version**.

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Related documentation

This user guide is only one of several documents supporting WCM 4.0 and higher, accessible through the Nstein Support Network, as described below.

1. *Glossary of Nstein Product Terms*

   `https://support.nstein.com/wiki/Glossary`

2. *WCM 4.0 Developer's Guide*

   `https://support.nstein.com/wiki/WCM/4.0/DevelopersGuide`

3. *WCM 4.0 Product Description*

   `https://support.nstein.com/wiki/WCM/4.0/ProductDescription`

4. *WCM 4.0 System Requirements*

   `https://support.nstein.com/wiki/WCM/4.0/SystemRequirement`

5. *WCM 4.X Installation Guide*

   `https://support.nstein.com/wiki/WCM/4.0/InstallationGuide`

6. *Sizing your Infrastructure*

   `https://support.nstein.com/wiki/SystemIntegrator/SizingYourInfrastructure#Dimensioning`

7. Support Network blog

   `https://support.nstein.com/blog/`

Chapter 1. Getting Started

This chapter provides instructions to help WCM users perform the following tasks:

1. Understand WCM and its primary features.
2. Get information on this user guide, as follows:
   - Style conventions used in this document.
   - Structure of the guide.
3. Log in to WCM.
4. Become familiar with the WCM home page dashboard and menus
5. Choose a working site.
6. Work with lock modes as follows:
   - Understand WCM lock modes.
   - Change the lock mode for content objects.
   - Access an object locked by another user.
   - Lock or unlock content..
7. Get help with WCM.

About WCM

Nstein Technologies' Web Content Management application (**WCM**) was designed to allow publishing professionals to produce polished Web publications with exceptionally high figures for "hits", readership and reader loyalty. WCM allows for a high degree of customization, so that client-specific templates can be designed to produce a Web site that is unique in appearance as well as content. As well, the WCM workspace can be fine-tuned to reflect each client's particular needs and work environment.

WCM, along with the DAM and TME products, comprises the **Nstein Digital Publishing Solutions** e-publishing suite, as shown below.

Nstein Digital Publishing Solutions

Products Diagram

TME

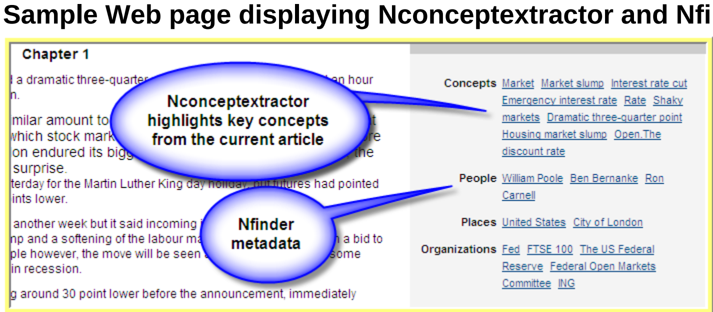
The Nstein TME is a text mining engine that is usually bundled with WCM. The TME is used to generate taxonomies and metadata, using specialized modules as follows:

1. **Ncategorizer**, used to generate category lists using learned hierarchies.

2. **Nconceptextractor**, used to extract concepts (see screenshot below);

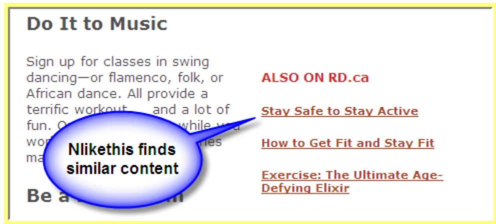
3. **Nfinder**, used to generate lists of organization names, people names and geographic locations (see screenshot below);

   Sample Web page displaying Nconceptextractor and Nfinder results

4. **Nlikethis**, used to generate lists of similar items. Nlikethis is accessible through the WCM content objects' respective **Referencing** pages to configure related content. The example below shows how related content can be listed on a Web page.

   Sample data from Nlikethis



5. **Nretriever**, used to produce detailed search results. Nretriever is used extensively in the DAM application to produce clustered search results.

6. **Nsummarizer**, used to generate article abstracts. (See the Chapter 4, *Articles and News Items* for examples.)

How WCM promotes readership

WCM allows publishing professionals to accomplish the following.

- Migrate their former paper or PC-based tasks to the WWW.
- Serve up quality digital content.
- Invite reader comments on content, manage comments, and moderate reader comments.
- Increase readership "stickiness" through blogs, forums, opinion polls, deep content linking and suggestions of related content.
- Harness the power of the TME's search engine optimization (SEO) capabilities, in which relevant keywords, strategic keyword placement and hyperlinks allow content to achieve a high ranking on search engine return pages, thereby improving the volume of traffic to a Web site. SEO also increases the likelihood that those accessing the site will fit the site's target audience profile.

About this document

Style conventions

This document uses the following paragraph styles to help you locate important information:

1. **Definitions** provide succinct details on various WCM and content management system (CMS) industry terms. Definitions are displayed as shown below.

> A *collection* is a page within a section created to support theme-based special features. For example, WCM users might want to configure a collection to hold content, such as videos or photos, centered around a certain special theme.

2. **Notes** provide general information, reminders and references to other topics. For an example, see below.

Note

When you are ready to complete the collection, from the menu bar, choose **Browse>Collections** and locate the collection you just created. Refer to the section called “Configure a collection” to configure it.

3. **Tips** provide information to help WCM users get the most out of the application. For an example, see below.

Tip

The **Publication name** and **Issue** lists are populated with user-entered data. To add a print publication to the list, select **Manage>Publications**. To add an issue to the list, select **Manage>Issues**.

4. **Cautions** help WCM users ensure that they have all the information needed before taking action. For an example, see below.

Caution

Meet with your Web developer before proceeding to this step, to ensure that he/she has configured all required data and updated all the templates you will need to successfully publish to the Web.

How this document is structured

This document is divided in Parts in which tasks are arranged according to the user group that will require them, as follows:

Table 1.1. User guide structure

PART	TASKS	TYPICAL USERS
PART I	An introduction to WCM and to functions that all users require, such as login.	All users
PART II	Content management procedures.	Journalists, Photographers, Editors, Publishers.
PART III	• Develop and manage Web templates. • Design sections. • Configure generation sets, objects and content. • Generate Web content.	Web developers; managing editors.
PART IV	Configure and manage users and groups, configure permissions.	Software administrators.
PART V	Create workflows, import content, maintain the database.	Web developers, software administrators, integrators.

Log in to WCM

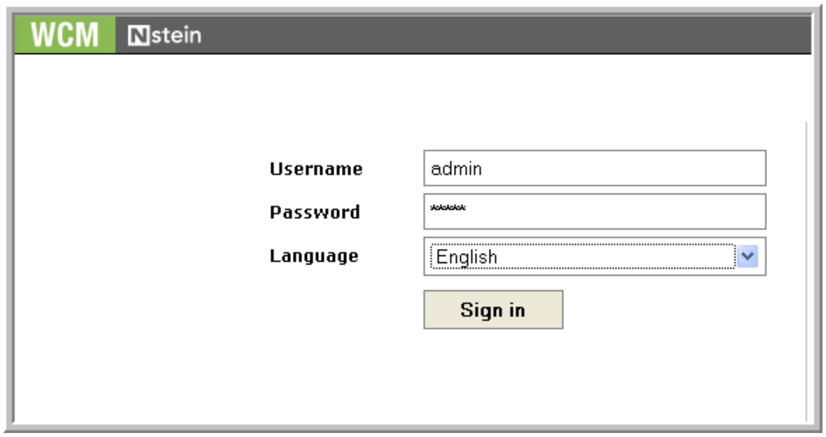
To log in to WCM, proceed as follows:

1. In a Web browser, enter the WCM Web address to open the login window, shown below.

Tip

WCM 4.0 and higher supports the following browsers: Microsoft Internet Explorer 7 and 8; Apple Safari 2; Mozilla Firefox 2 and 3.

Login window



2. Beside **Username**, enter the user name provided by your software administrator.

3. Beside **Password**, enter the password provided by your software administrator.

Note

WCM passwords are case-sensitive.

4. Select a working language from the **Language** drop-down menu.

5. Click **Sign in**. The WCM home page dashboard will be displayed, as described in the next section.

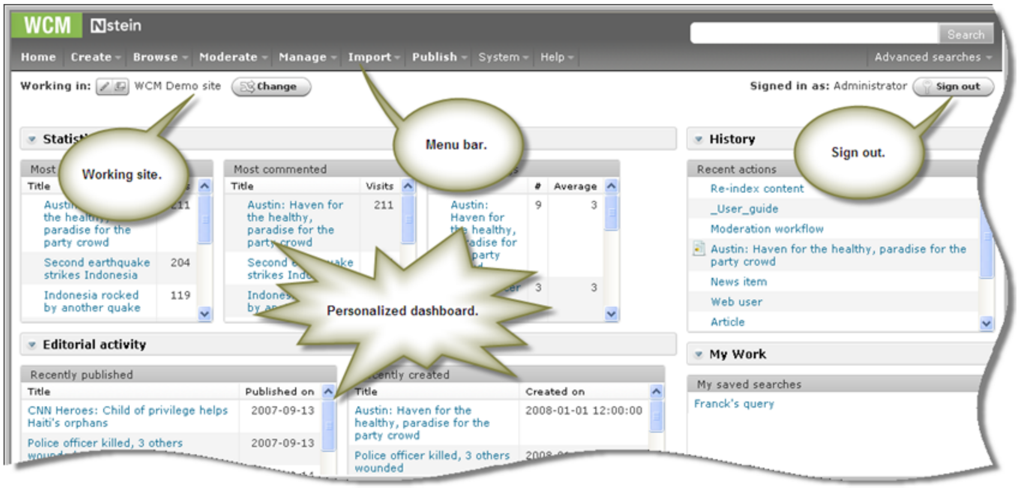
WCM home page dashboard

Following login, you will be presented with a home page shown below. The **menu bar** across the top of the window provides access to all functions.

Note

The functions available to a given user depend on his/her group permissions.

Home page dashboard



WCM dashboard

> The WCM *dashboard* is the space on the home page below the menu bar. The dashboard's dynamic content can be a useful way to provide users with a snapshot of WCM content that is currently most active--in the example above, the dashboard displays modules for 'most visited', 'most commented' and 'most rated', among others. To jump to the content displayed, the user has only to click a link.

The dashboard's appearance and content is entirely customizable, on a company wide basis and/ or as custom dashboards for specific users.

WCM menus

The WCM menus are as follows:

- The **Home** menu is used to display the dashboard.
- The **Create** menu is used to create content.
- The **Browse** menu is used to browse existing WCM content.
- The **Moderate** menu is used to manage user comments and online forums.
- The **Manage** menu is used to manage Web users, configure sites and sections, and manage publication and issue objects used during import.
- The **Import** menu is used to import assets from the Nstein DAM, or to import content in various XML formats created outside WCM.
- The **Publish** menu is used to generate and publish content.
- The **System** menu is used for user administration, WCM user interface (UI) customization and configuration, and database administration.
- The **Help** menu is used to get access version information, user documentation and support services.

Choose a working site

> A *site* is the WCM system object representing the home page of your Web publication. The home page can contain a header, a footer, tag clouds, news items, and links to other content such as collections, polls, forums, articles and so on.

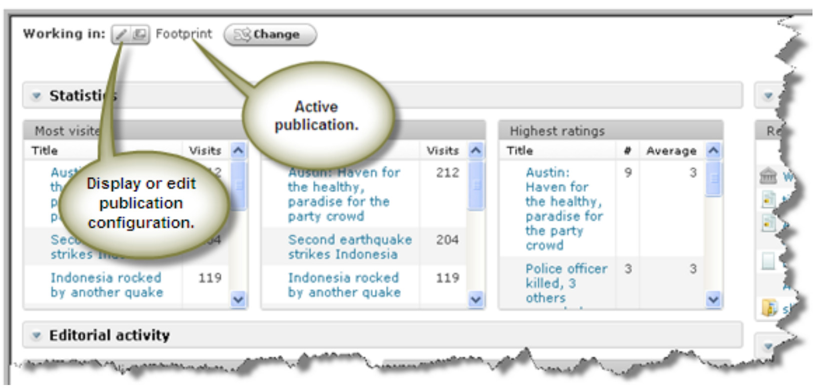
All content creation operations require that you select a site for the content. Thus, each time you create and save content such as an article or an audio clip, you must specify the site with which it will be associated, using the procedure below.

To choose a working site, proceed as follows:

1. Log in to WCM. In the top left of the window, the currently selected site is displayed beside **Working in**.

2. Click **Change** and select the desired site from the pop-up list. The selected site becomes the active site, as shown below.

   Selected site



Tip

To display or edit the active site's configuration, click the pencil icon as shown above.

About WCM lock modes

In Version 4.0, WCM has introduced two modes that control how user data is saved and how data is updated in a multiple user environment: Optimistic mode and Pessimistic mode, as described below. Both these modes are configurable on a class-by-class basis, meaning that it is possible to (for example) configure WCM to use Pessimistic mode for articles, and Optimistic mode for other content types.

Note

System administrators can display lists of locked content, and unlock content as required. For more on this function, see the section called “Display all locked content or system objects”

Optimistic lock mode

> In Optimistic mode, no check-in or check-out is required for a user to open or save a content object. This mode is intended for work environments where there is little likelihood that two users will be working simultaneously on the same article or other content object.

When Optimistic lock mode is active, users can create or open an existing object, make changes to it, and save it without performing a check in or check out.

Optimistic lock mode allows users to optionally lock a content object to prevent other users from accessing it, as shown below. When the lock is active, other WCM users cannot access the content object.

Caution

In Optimistic mode, if a user opens an object which another user is already busy modifying (and has not locked), only the user who saves first will have his/her data updated. The user who subsequently attempts to save the object will lose his or her changes.

An article open in Optimistic lock mode

Caution

Do not use Optimistic mode in work environments where many users share responsibility for editing the same content.

Lock or unlock a content object in Optimistic mode

Note

The lock mode for a class" affects the lock mode for all content objects in that class. Thus, if the Article class is configured for Optimistic mode, the create and edit functions for all articles will use Optimistic mode.

To lock or unlock a content object in Optimistic mode, proceed as follows

1. Log in to WCM.

2. Open an existing content object, using the **Search** function or by clicking a dashboard link.

Note

For new content objects, the lock function is available only after the content object has been saved.

3. Check the top right of your window. content objects configured for Optimistic mode display a **Lock** button when they are opened, as shown below.

Lock button

4. To lock a content object for editing, click **Lock**.

Note

Locked content will appear in a search and other users can still display locked content; they just cannot modify it.

Caution

Always be sure to unlock the content when you are done, or else your content object will not be available to other users and could be left out of generated Web pages.

5. To unlock content, save your work if necessary, and click **Unlock** as shown below.

Unlock button

Pessimistic lock mode

> *Pessimistic lock mode* requires users to perform a check-out when they open a content object for editing, and a check-in when they are done, to save their changes. Checked-out content objects are locked and cannot be accessed by other users until they are checked in. This mode is intended for work environments where multiple users are responsible for a large body of content.

When Pessimistic lock mode is active, users must check-out the object to open it, as shown in the example below, and check-in the object when the procedure is complete. The only exception to this rule involves the creation of a new object, which, since it did not previously exist, need not be checked out initially.

An article open in Pessimistic lock mode

Tip

Performing a *check-in* saves your changes and makes the object available to other users. For these reasons, make it a habit to perform a check-in before exiting from a WCM window.

Lock or unlock a content object in Pessimistic mode

Note

The lock mode for a class" affects the lock mode for all content objects in that class. Thus, if the Article class is configured for Pessimistic mode, the create and edit functions for all articles will use Pessimistic mode.

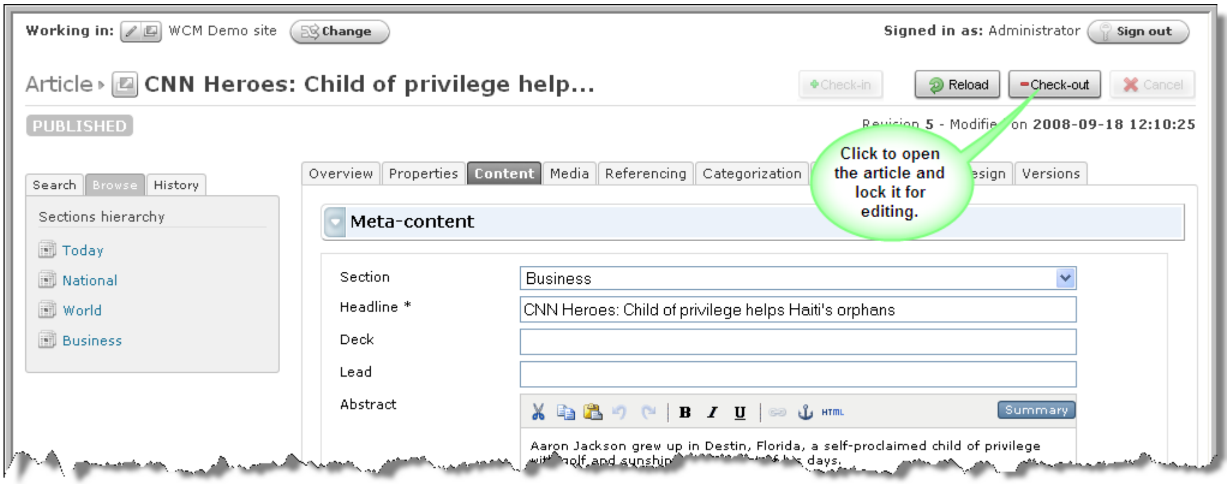
To lock or unlock a content object, proceed as follows

1. Log in to WCM.

2. Open an existing content object, using the **Search** function or by clicking a dashboard link.

3. Check the top right of your window. content objects configured in Pessimistic lock mode display a **Check-out** button as shown below.

   Check-out button



Note

If **Check-in** is displayed, no action is required: your new content is automatically locked until you click **Check-in**.

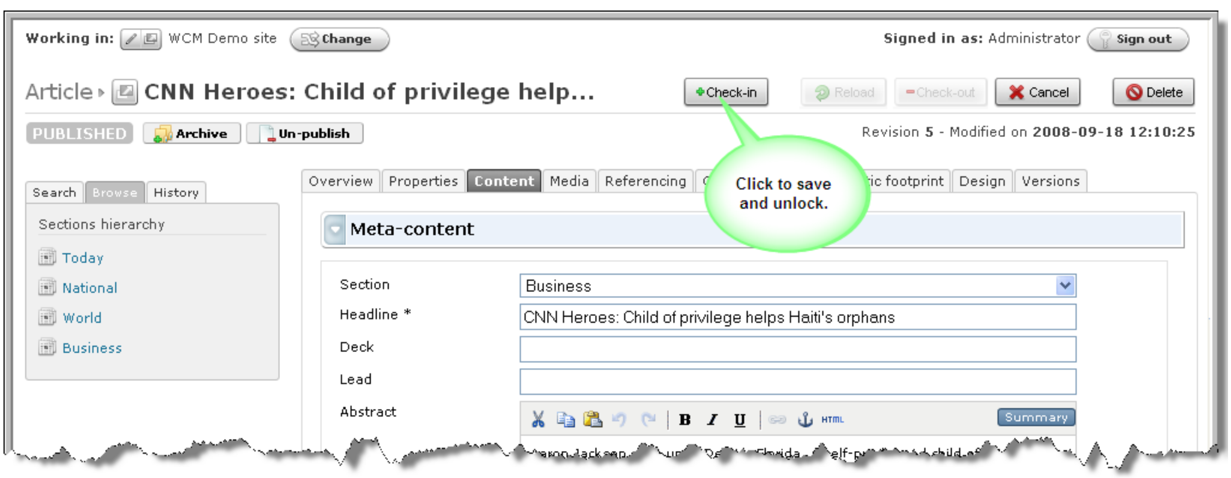
4. To lock a content object for editing, click **Check-out**.

Note

Locked content will appear in a search and other users can still display locked content; they just cannot modify it.

5. To save your work and unlock content, click **Check-in** as shown below.

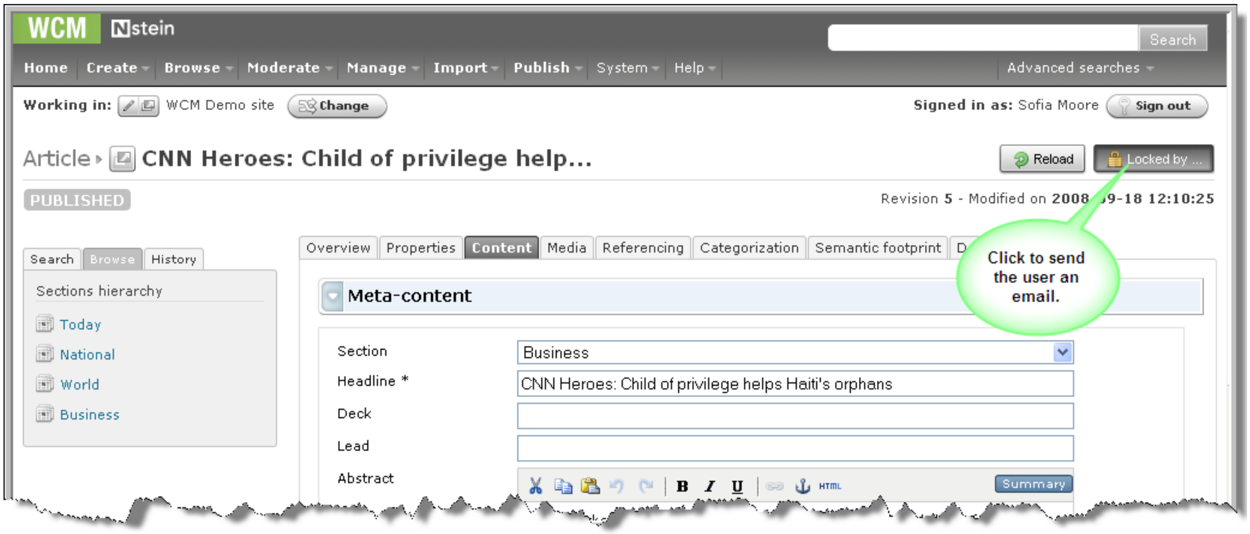
Check-in button



Access an object locked by another user

An object that has been checked out (Pessimistic mode) or locked (Optimistic mode) is locked so that other WCM users cannot make changes to it. The screenshot below shows the button displayed when users open an object which has already been checked-out or locked by another user.

Checked out objects are locked



To send the user who has checked out or locked an object an email, (useful to remind them to unlock the object for example), simply click the **Locked by** button as shown above. Enter a message in your email application, and send the email.

Note

User administrator type users can display and, if necessary, unlock content. For more information, see the section called “Display all locked content or system objects”

Change the lock mode for content types

In WCM, *content types* represent categories of content (such as photos).

Optimistic lock mode is the default setting in the out-of-the-box version of WCM 4.0. However, system administrators can change the active lock mode on an object-by-object basis, as described below.

Note

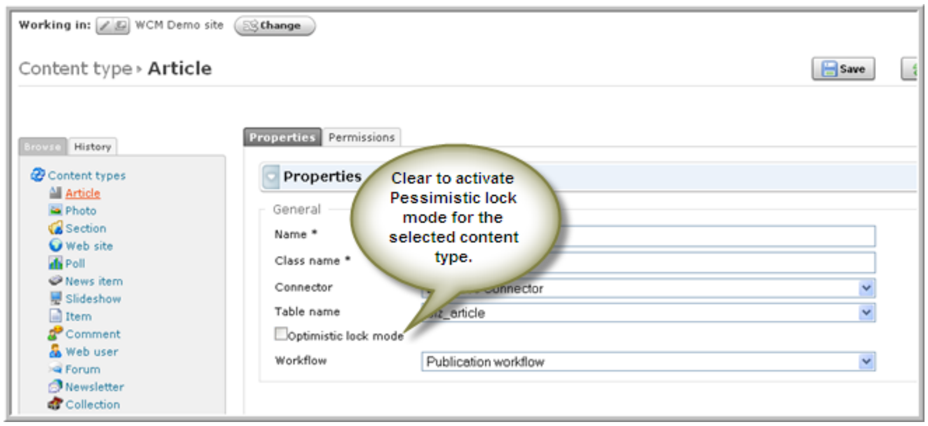
Only those with system administrator privileges should have access to this function.

To change the lock mode for content objects, proceed as follows:

1. From WCM menu bar, choose **System>Manage Content Types** to open the **Content type** window as shown below.

2. Select a content type from the **Browse** pane at left.

   Setting Pessimistic lock mode for article objects



3. Do one of the following:

   - To activate Pessimistic lock mode for the selected content type, clear the **Optimistic lock mode** checkbox as shown above.

   - To activate Optimistic lock mode for the selected content type, select the **Optimistic lock mode** checkbox.

4. Click **Save** or **Check-in** to save your settings.

5. Repeat from Step 2 to change the lock mode for other content objects.

Get Help

To access user documentation at any time, from within WCM, from the menu bar, choose **Help>Documentation and support**.

Note

For information on how to contact Nstein's Help desk, see the section called “Nstein contact information”

Part II. WCM Content Management

Table of Contents

Chapter 1. Publication Structure

This chapter provides instructions to help WCM users perform the following tasks:

1. Understand the structural elements of a Web publication.
2. Configure a site for your Web publication.
3. Configure the sections of your site.

Note

This chapter includes only instructions for basic section configuration. Once you have created all the content that will be used in a section, refer to Part III, Chapter 2, *Section Content and Layout* for instructions on designing section layout and configuring related content and URL for a section.

About structural elements

The *structural elements* of your Web-based publications are sites and sections. Sites and sections provide a way of organizing content objects into logical groups according to their subject matter.

Note

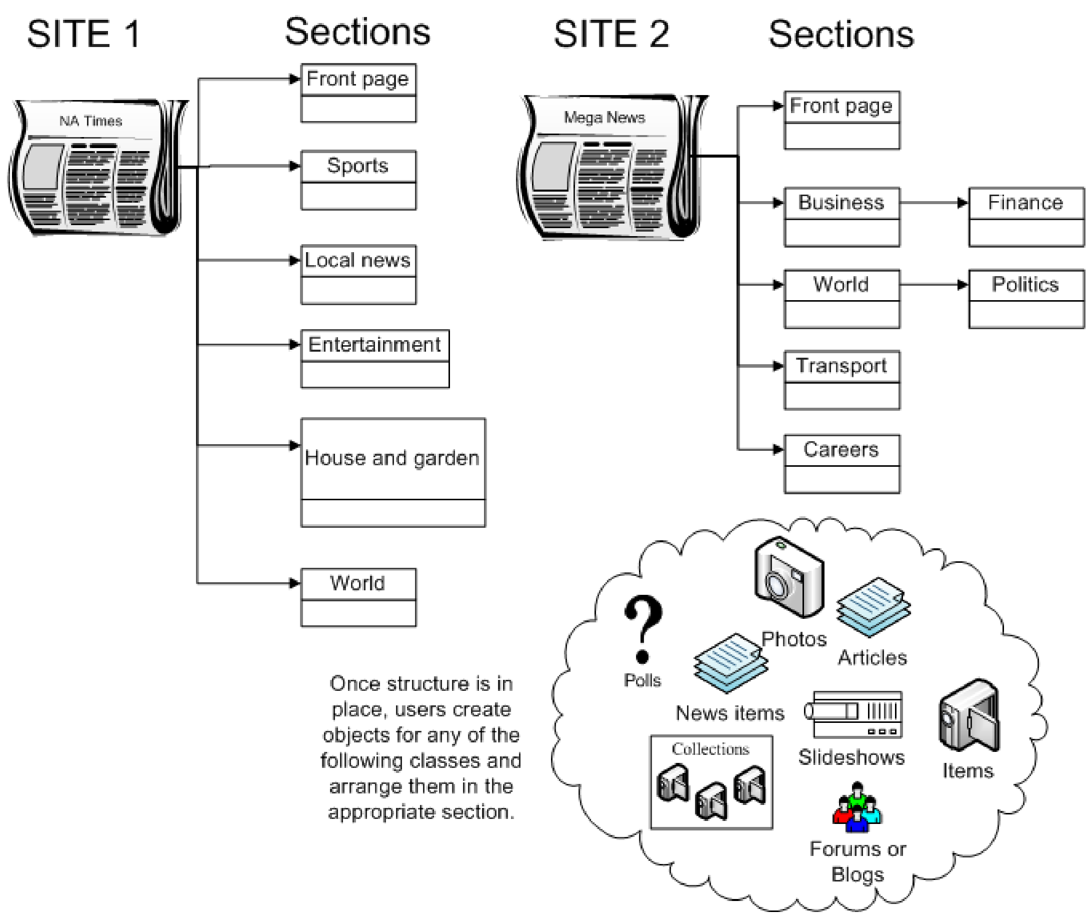
The templates set up by your Web developer will control how your content will be laid out and which content will be used in the Web publication itself.

The two structural elements set up by WCM users are as follows:

1. A **Site** must be created to serve as the repository for all the content, metadata, and files related to a particular Web publication. The site will be accessible through the Web. WCM users can create multiple sites.
2. **Sections** must be created for the various topic categories featured in your Web publication. Sections are similar to the sections of a print newspaper. Sections are accessible through a menu bar on each page of a Web-based publication. WCM users must create sections early in the process in order to associate content objects with the correct section when the content objects are created.

   The figure below provides an example of the site and section objects one might create in order to structure two sites.

   Documentation structure



Create a site

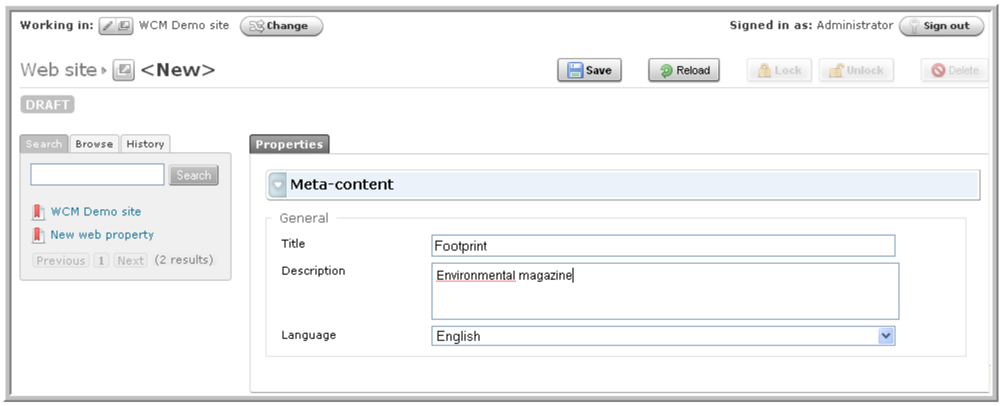
A *site* is the WCM system object representing the home page of your Web publication. The home page can contain a header, a footer, tag clouds, news items, and links to other content such as collections, polls, forums, articles and so on. Once you have created a site, you can create sections, add content and publish to the Web.

To create a site, proceed as follows:

1. Log in to WCM.

2. From the menu bar, choose **Manage>Web sites** to open the **Web site** window as shown below.

   Web site window



3. Fill in the **Site** window as follows:

- Beside **Title**, enter a name for the digital publication you wish to create.
- Beside **Description**, enter a description of the publication.
- Beside **Language**, select the desired language from the drop-down menu.

> **Note**
>
> The site will not actually be visible on the Web until it is generated, as described in the publishing chapter of this document.

4. When you are done, select **Save** or **Check-in** (according to your selected lock mode).

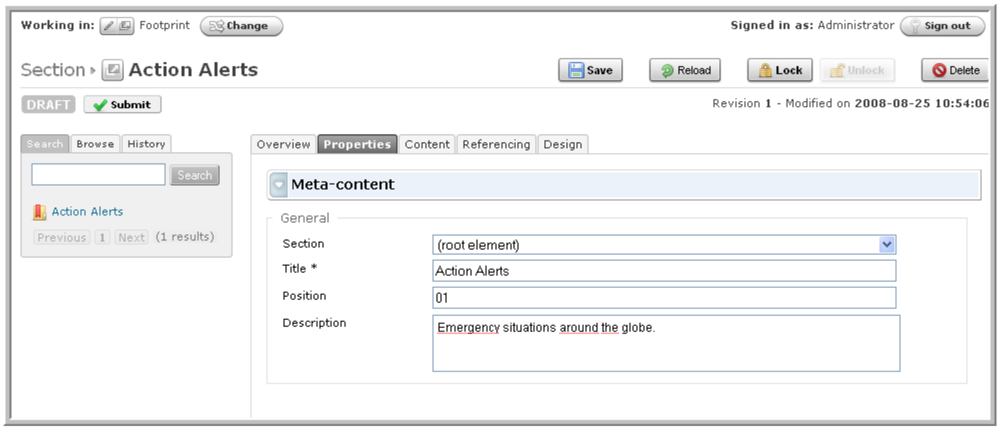
Create a section

A *section* (also known as a *channel* in WCM code and in some documentation) is a set of content focusing on a specific topic--for example, *World News*. Once you have created a section, you can add and configure its content.

To create a section, proceed as follows:

1. Log in to WCM and select a working site.
2. From the menu bar, choose **Manage >Site sections** to open the **Section** window shown below. Click the **Properties** tab to open the **Properties** page as shown below.

   Section window



3. Beside **Section** choose an option to indicate the parent for your section (for example, the *Africa* section might have *World News* as its parent). For a main section, such as World News, Sports, or Entertainment, select **(root element)**.

4. Beside **Title**, enter the name of the section you are creating.

5. Beside **Position**, enter a value to control the position of the current section. If you do not enter a value, the sections will be listed alphabetically.

Tip

The **Position** value can control a section's sequence in lists within the WCM, and in Web pages. For example, if you entered **01** for a *World* section, *World* would appear at the far left of a menu bar.

6. Beside **Description**, enter a description of the section.

7. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your section.

Chapter 2. Searches and Queries

This chapter provides WCM users with instructions to perform the following tasks:

1. Perform a keyword search using words alone or in combination with a special operator as follows:
   - Keyword search using the AND operator.
   - Keyword search using the NOT operator.
2. Search using multiple criteria (advanced search).
3. Implement various search navigation techniques, including how to display content in List view and in Grid view.
4. Browse objects by section or by content type.
5. Filter search results using the following criteria:
   - By metadata.
   - By section.
   - By class.
   - By date range or source.
6. Create or run a saved search.
7. Create or manage bins.

Note

To search readers' comments, see the section called “Search comments by state”.

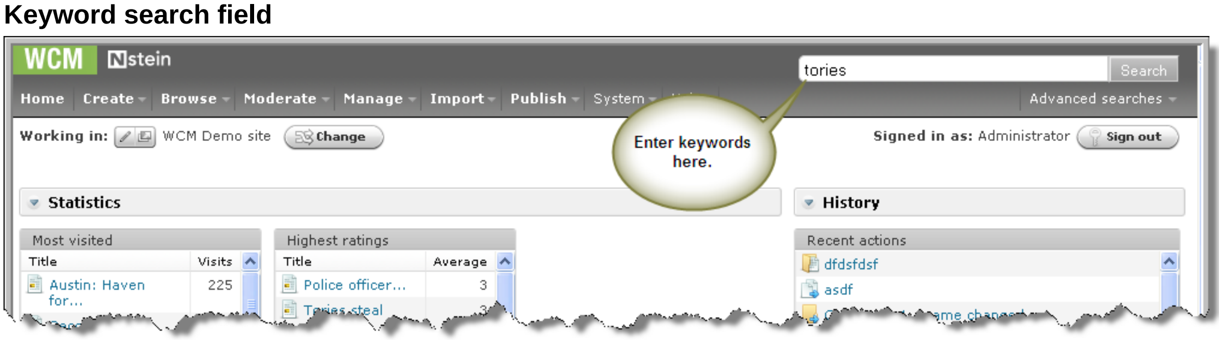
Keyword search

A *keyword search* is a simple search method using a word or phrase. WCM users can make their keyword searches very precise through the use of special search operators.

To perform a keyword search, proceed as follows:

1. Log in to WCM. Locate the search field at the top right of any WCM window as shown below.

Keyword search field



2. Enter one or more keywords and press **<Enter>** or click **Search**.

Tip

To search a specific phrase, place the words between quotation marks. For example, "Montreal Canadians" will only find instances where this exact phrase occurs.

Caution

Forward slash (/), back slash (\) and hyphen (-), are reserved characters that cannot be successfully used to locate text that includes these characters. However, to locate text that includes these characters, one can simply omit these characters from search strings. Thus, to find an article with the headline "Little Red Riding-Hood", the user would enter "Little Red Riding Hood" (note the absence of the hyphen) in a keyword search or in the **Full text** or **Title** field for an advanced search.

3. The search results will be displayed, as in the example below.

Results of a search by keyword

Tip

If your search results list is very long, you can use one of WCM's multiple filters to obtain more precise results. For more information, see the section called “Search results filters”

Tip

If you cannot locate recently added content, perhaps the index is not up-to-date. Use the re-indexing function to correct the problem.

4. To open a content object in the search results list, click the pencil icon.

Note

To save some or all of your search results as a collection, see the section called “Create a collection 'on the fly'”.

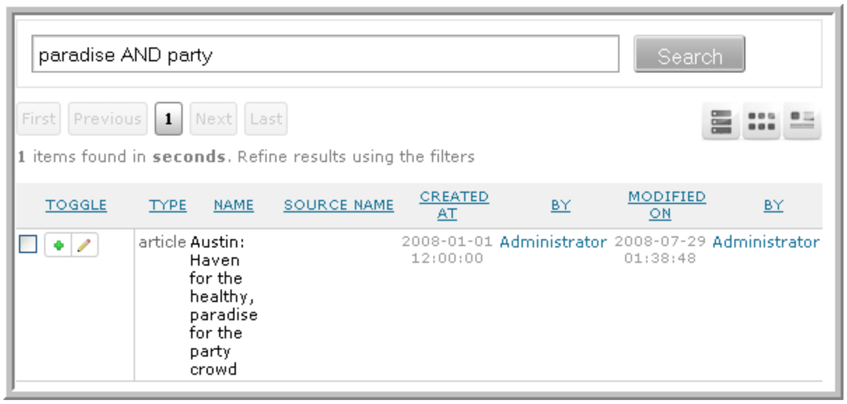
Search using the AND (+) operator

Note

The default behaviour of the search engine is to consider every search in which no operator is specified as an OR type search. Thus, for example, the search string "hockey", "montreal' and "Canadian" will find content objects that contain any of these words, but not necessarily all of them.

The AND operator is used to search for two or more words, with the condition that both words must appear in the content object that is returned, as shown in the example below.

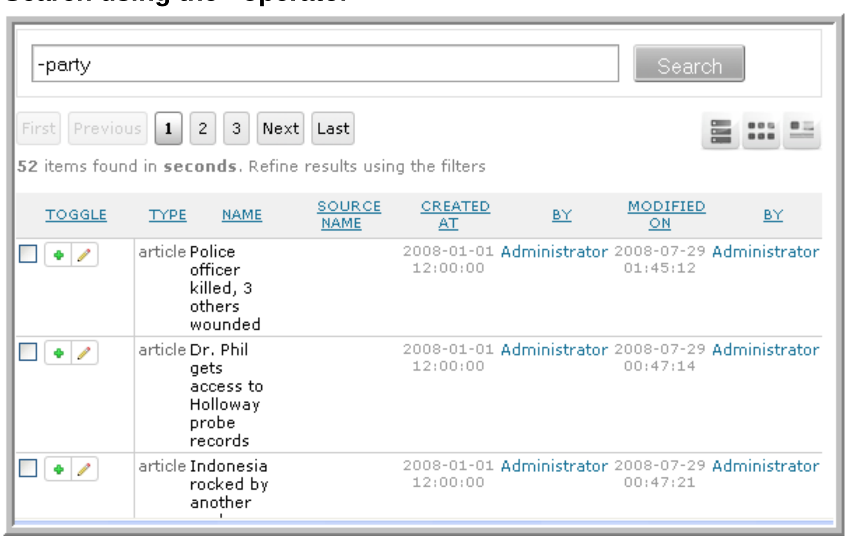
Search using the AND operator



Search using the - (NOT) operator

The - operator is used to ensure that the specified word does not occur in the search results, as shown in the example below.

Search using the - operator



Tip

Use AND NOT to search one term and exclude an additional term. For example, to retrieve articles about earthquakes that do not mention hurricanes, enter "earthquake AND NOT hurricane".

Advanced search

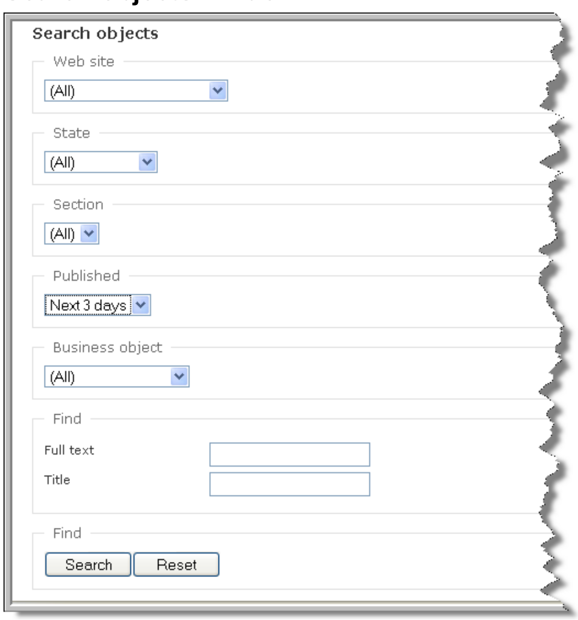
Advanced search is a method whereby users can specify multiple criteria for the search, using the lists and fields provided. The procedure outlined below can be used to search for any type of content.

To perform an advanced search, proceed as follows:

1. Log in to WCM.

2. At the top right of any WCM window, click **Advanced searches>Editorial** to open the **Search objects** window as shown below.

   Search objects window

3. In the search window, set up your search criteria as described below.

   - Under **Web site**, select a site for your search.
   - Under **State**, select a workflow state.
   - Under **Section**, select a section of the site.
   - Under **Published**, choose a time frame to search by publication date.
   - Under **Business object**, choose a content type.

- To search multiple fields of the article or news item, enter a string beside **Full text**.

Tip

The fields searched will depend on how "full text" was defined when your TEXTML or MySQL server was configured. Generally, "full text" searches all text fields (for example the title or headline, body, author and so on), but not numerical fields such as dates.

4. To search by title, enter the title beside **Title**.

Tip

The **Title** field only returns content that exactly matches the string entered (except for case; it is not case sensitive). Thus, a search for "Chicago" would return an article entitled *Chicago*, but not one entitled *Chicago, the windy city*. In order to search articles containing either of the above titles, use wildcards (that is, enter `*Chicago*`) or enter your string in the **Full text** field instead of the **Title** field.

5. Click **Search**.

Note

To save some or all of your search results as a collection, see the section called “Create a collection 'on the fly'”.

Search results navigation

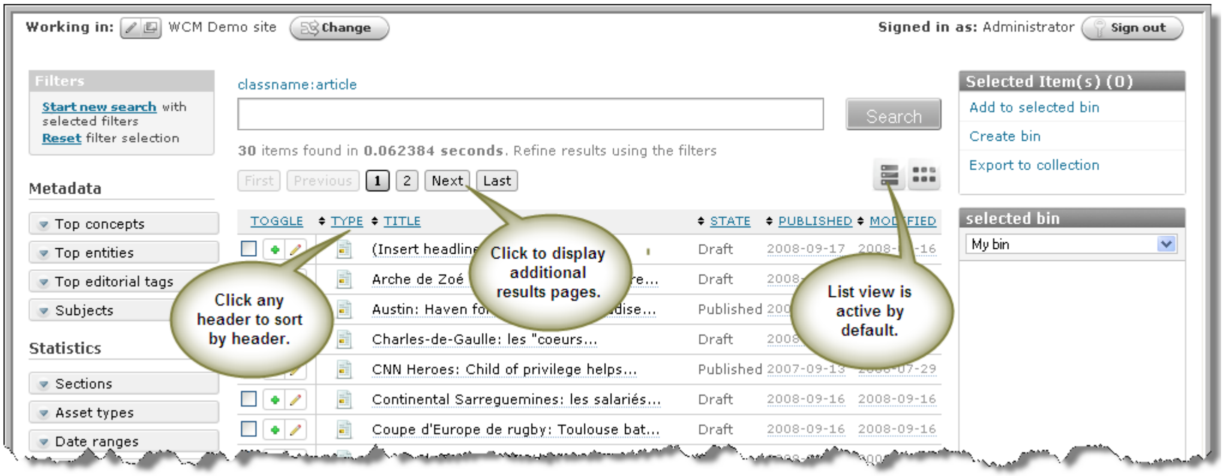
Note

By default, search results are displayed in List view, as shown below. For alternate view layouts, see the Grid view section below.

To navigate search results, proceed as follows:

- To move from page to page, click the arrow keys as shown in the screenshot below, or use the **First**, **Last**, **Next** and **Previous** buttons.
- To sort search results by one of the criteria listed in the List view headers, such as **Title**, click the desired header.

Search results navigation



Display content in Grid view

Grid view is a method of displaying the assets from a search in rows and columns, like pictures in an art gallery. Gallery view is particularly practical for image-based assets, because it makes it easy to scan the thumbnails.

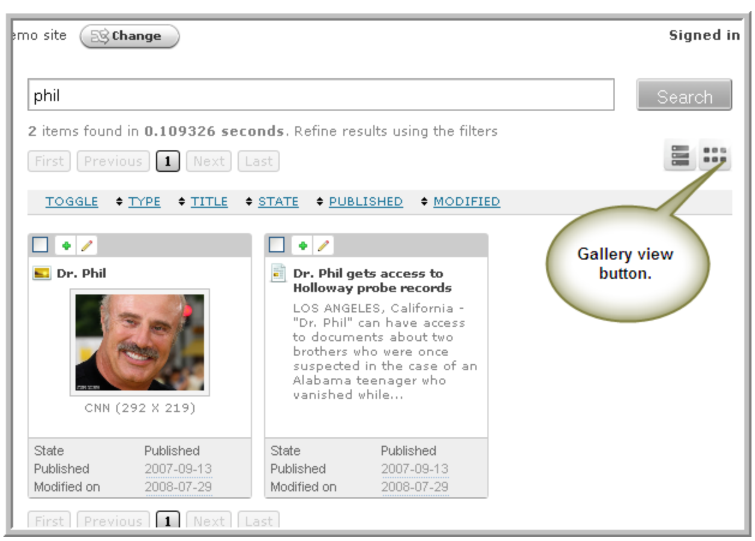
Gallery view is the default view mode for browsing photo, slideshow and video content objects, and can be a practical option when a search returns content objects from multiple content types.

To display search results in Gallery view, proceed as follows:

1. Use one of the search techniques previously described to retrieve a list of content.

2. In the search results page, click the Gallery view button, as shown below. The content will be displayed as shown below.

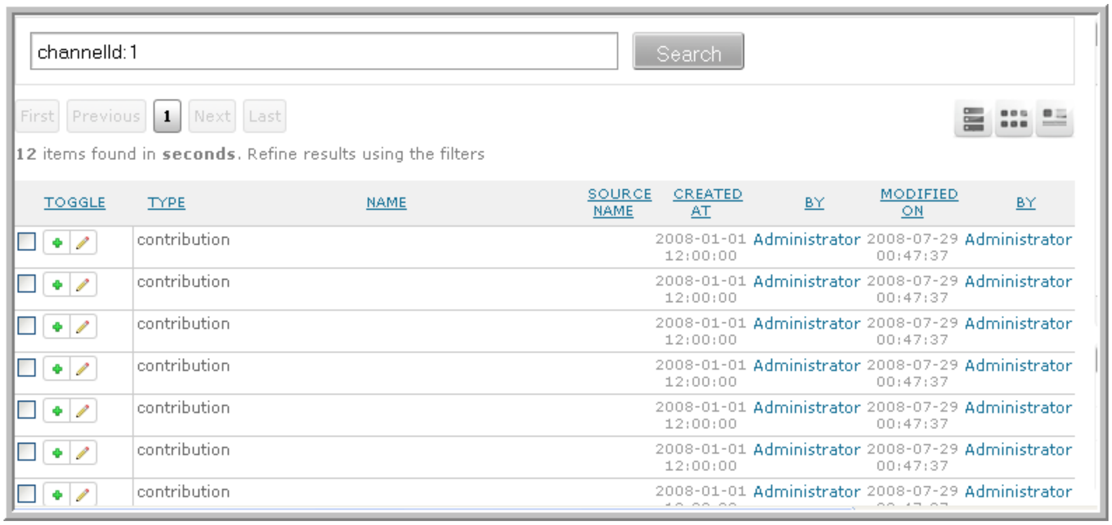
Photos in Grid view



Browse all content in a section

To retrieve all content for a section, enter `channelId: [section ID]`, replacing [section ID] with the numerical section ID as shown in the example below.

Browse content for a section



Tip

To know the ID for a section, click **Advanced search>Editorial** and observe the numbers displayed beside the section in the **Section** dropdown list.

Browse objects by content type

Content types represent various categories of content within WCM. WCM content types are articles, news items, photos, slideshows, items, collections, polls, and forums. Within each class are various content objects, which represent individual instances of content. For example, the content type *Article* might contain the content object "*Wikinews at Toronto film fest party, with Diddy*".

WCM provides a function whereby users can retrieve all of a given content type. For example, if you wanted to view all polls that had been created, you would follow the procedure below. You could also use this procedure as a first step to locating a specific poll.

To browse all objects within a certain content type, proceed as follows:

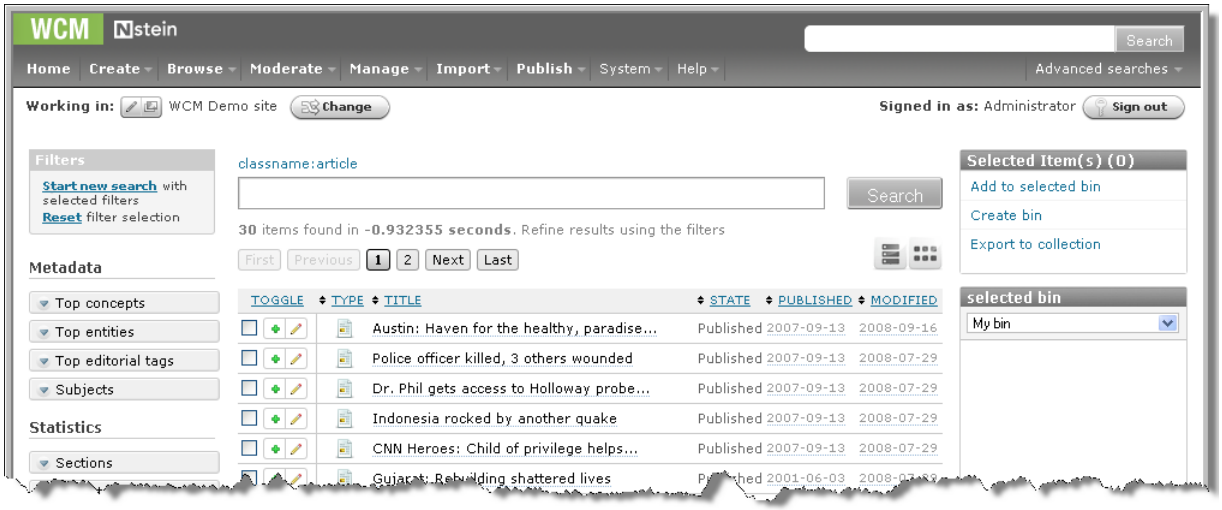
1. Log in to WCM.

2. From the menu bar, click **Browse** and select any of the following:

• **Articles**, to retrieve articles.	• **Slideshows**, to retrieve slideshows.
• **News items**, to retrieve news items.	• **Collections**, to retrieve collections.
• **Photos**, to retrieve photos.	• **Items**, to retrieve HTML and PDF items.
• **Newsletters**, to retrieve newsletters.	• **Polls**, to retrieve polls.
• **Forum threads**, to retrieve all forums.	

3. All instances of the selected class will be listed, as shown in the example below.

   List of articles



4.
   - To navigate within the results, see the section called “Search results navigation”.
   - To filter the results by various criteria, see the section called “Search results filters”.
   - To open an item on the search results list, click the pencil icon in the **Toggle** column.

Search results filters

> *Filters* are criteria that allow users to narrow down lists of content in order to target only content that meets certain additional requirements. Thus, for example, a WCM user might first browse all articles, and then apply filters to display only articles from a certain section, or to locate articles containing a specific word or phrase. WCM provides quick functions to filter search results by keyword, by TME metadata such as subject, by section, by date range or by source, as described below.

Filter search results with TME metadata

The Nstein TME is activated when the search function is active, generating various metadata lists that can be used to quickly narrow down the search results based on various criteria.

To use TME metadata to filter a results list, proceed as follows:

1. Use one of the search techniques previously described to retrieve a list of content. Metadata lists will be displayed along the left column of the page.
2. Select one or more checkboxes beside any of the following to filter your search results list:
   - The **Top Concepts** list displays concepts that the NconceptExtractor text mining module has pinpointed.
   - The **Top Entities** list displays people names, geographic locations, and organization names that the Nfinder text mining module has pinpointed.

- The **Top Editorial Tags** list displays tags that were most often used for content. (For more information on tags and how they are assigned, see the section called “Configure IPTC codes and tags for a content object”.)
- The **Top Subjects** list displays subjects that the Ncategorizer text mining module has pinpointed.

Filter search results by section

To filter search results by section, proceed as follows:

1. Use one of the search techniques previously described to retrieve a list of content.
2. Expand the **Sections** list, as shown below, and select a section. The search results will be filtered to show only content belonging to the selected section.

Filtering search results by section

Filter search results by content type

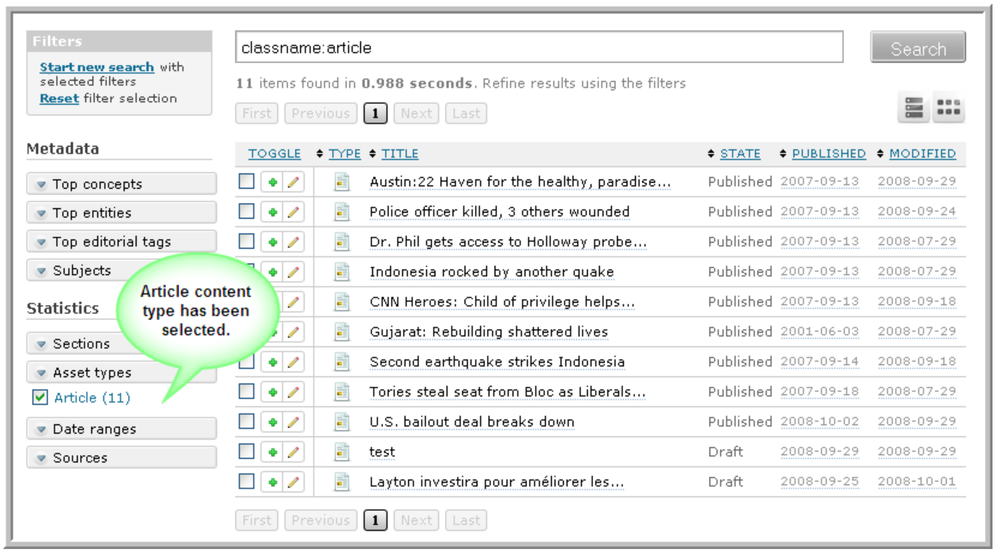
> In WCM, *content types* represent categories of content (such as photos).

This function is useful when you have previously done a search by keyword, or performed an advanced search, and wish to narrow the search results list to display only objects that belong to a specific content type, such as photos.

To filter search results by content type, proceed as follows:

1. Use one of the search techniques previously described to retrieve a list of content.
2. Expand the **Asset types** list, as shown below, and select a content type. The search results will be filtered to show only content belonging to the selected class.

Filtering search results by content type



Filter search results by date range or source

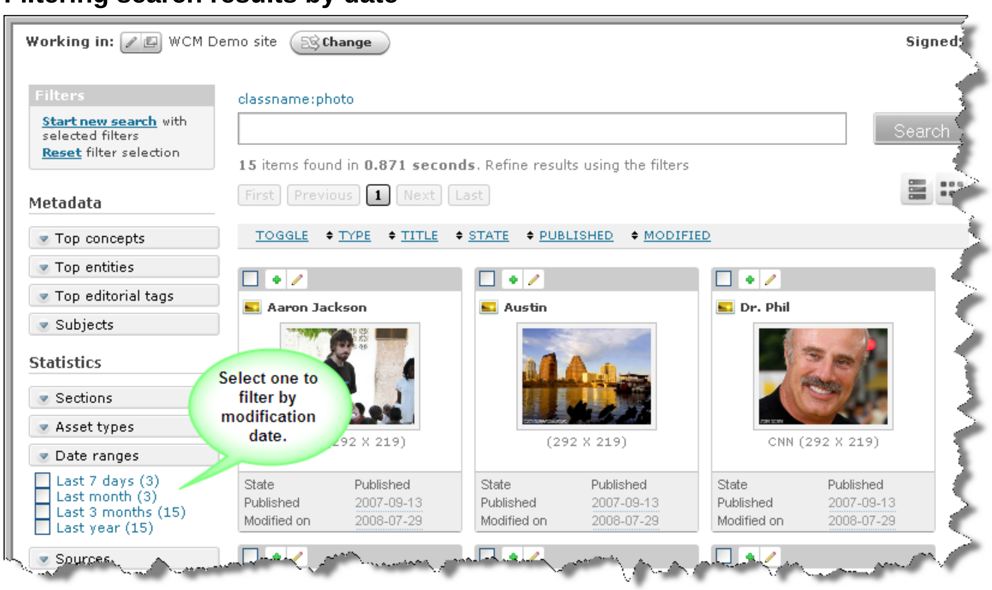
Important

The date ranges provided by WCM are based on the system date registered when users modify content, not on the configured publication dates for the content.

To filter search results by date range or source, proceed as follows:

1. Use one of the search techniques previously described to retrieve a list of content.
2. To filter by date, expand the **Date range** list, as shown below, and select the modification dates you are seeking. The search results will be filtered to show only content modified in the selected date range.

Filtering search results by date



3. To filter by source, expand the **Sources** list, and select one or more of the sources displayed.

> **Note**
>
> The source for a content object is configured in the **Properties** page. If no sources have been configured for the WCM content, the **Sources** heading will not contain any options.

Saved searches

A *saved search* is a set of search criteria that is saved for future use. For example, a sports editor who writes for the publication *Footballer*, who often searches for soccer-related content from *Sports Digest*, a sister publication, might set up an advanced search with the criteria: ***Site: Sports Digest; Published: last 3 days, Full text: Soccer football***. After saving this search as "Soccer", this editor has only to select "Soccer" to bring up a list of all soccer content published in *Sports Digest* over the past three days.

Create a saved search

To create a saved search, proceed as follows:

1. Perform a search.

2. In the search results window, select **Save current search** as shown below.

Saving a search

3. Fill in the **Save search** popup window shown below as follows:

   - Beside **Title**, enter a descriptive name for the search.
   - Beside **Description**, enter a description for the search.
   - To have your saved search displayed on your home page dashboard, select the checkbox beside **Add to dashboard**.

Save search window

4. Click **Save**. The saved search will be added under **My saved searches** in the search results page and will be added to the dashboard.

Run a saved search

Note

Before attempting this procedure, you must create a saved search.

To run a saved search, proceed as follows:

1. From the WCM menu bar, click **Home** to open the dashboard.

2. Under **My saved searches**, select the search you want to run, as shown below. The search will be performed and the search results will be displayed in the window.

My saved searches

Note

To add your results to a collection, see the section called “Create a collection 'on the fly'”.

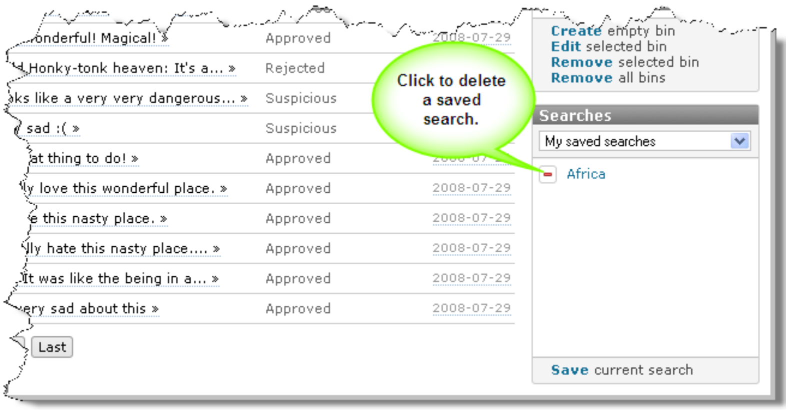
Note

You cannot edit a saved search. However, you can create a new saved search by following the procedure above, and/or delete an existing saved search, as described below.

Delete a saved search

To delete a saved search, click the red bar beside its name, as shown below. The saved search is immediately deleted.

Delete a saved search



Working with bins

> *Bins* are WCM system objects that provide a means for users to set aside content for easy access later on. For example, suppose a journalist is researching schools for Inuit children. The journalist could perform a search for articles and content dealing with this topic, and place them in a bin so that they are readily accessible each time the journalist logs into WCM.

Create a bin

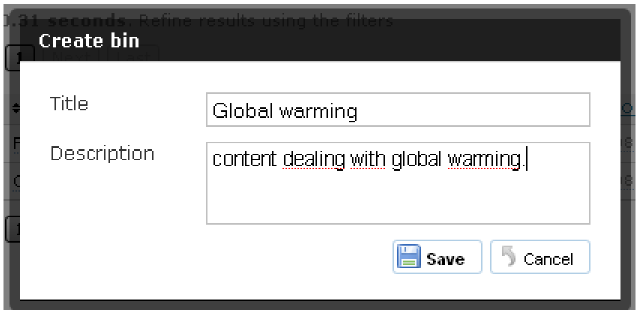
To create a bin, proceed as follows:

1. Perform a search or browse to locate the content required for your bin as shown below.

Search results

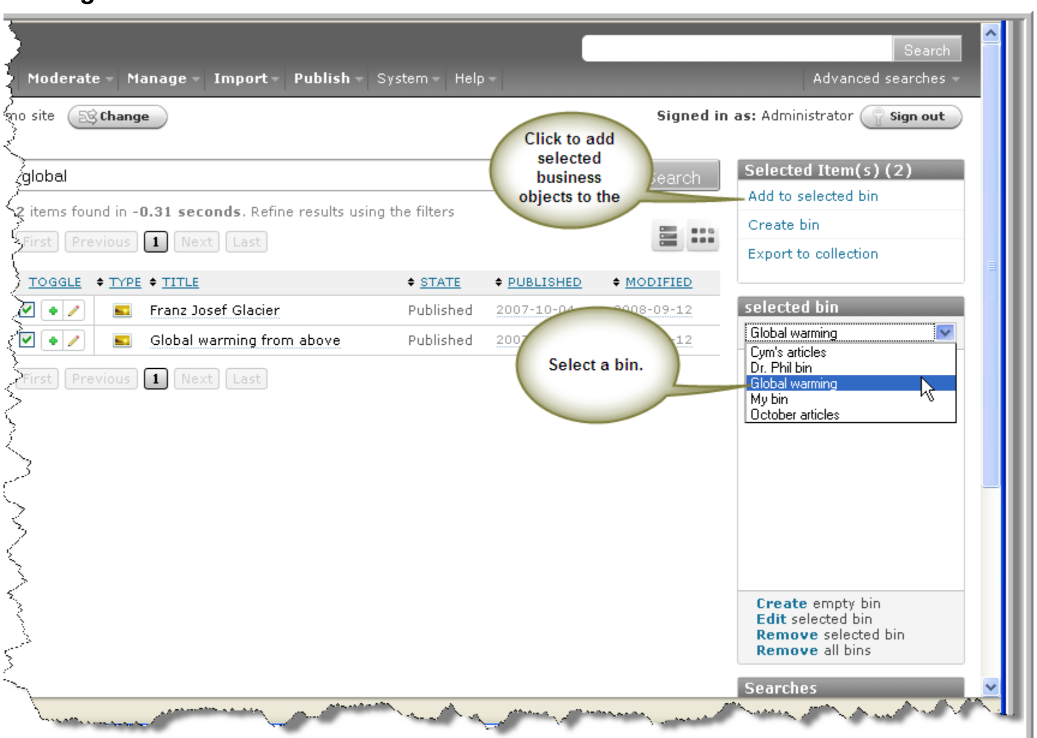
2. In the search results window, select **Create bin** to open the **Create bin** window as shown below.

   Creating a bin

3. Beside **Title**, enter a descriptive name for the bin.
4. Beside **Description**, enter a description for the bin.
5. Click **Save**. The bin will be added to the **Selected bins** drop-down list on the search results page.
6. To add content to the bin,
   - Select content objects from your Step 1 search results list;
   - Select your bin;
   - Click **Add to selected bin** as shown below.

   Adding content to a bin

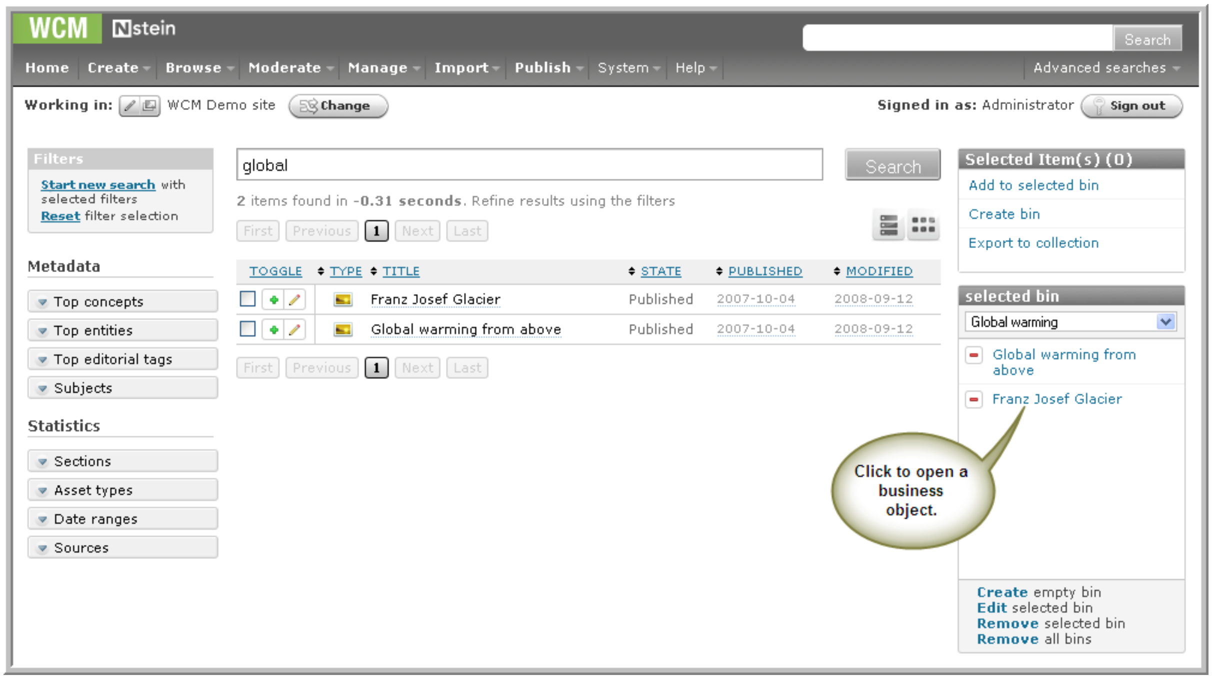
Manage content in a bin

To manage the content in a bin, proceed as follows:

1. Perform a search to open the search results page.

2. To display the content in a bin, select the bin from the list under **Selected bin**. The contents of the bin will be displayed, as shown below.

Contents of a bin



3. To manage the **content in the bin**, proceed as follows:

   - To open a content object in the bin, click its title.
   - To remove a content object in the bin, click the red bar beside its title. The content object will be immediately removed from the bin. (No confirmation will be displayed.)

4. To manage the current bin or other bins, proceed as follows:

   - Click **Create empty bin** to create a new bin.
   - Click **Edit selected bin** to modify the current bin's description.
   - Click **Remove selected bin** to delete the bin.
   - Click **Remove all bins** to delete all bins.

Chapter 3. Photos and Slideshows

Photos are digital images that photographers or journalists have uploaded to their own PC or to the network.

What is the difference between photos and images? In WCM, the term *photos* covers both photos and images. However, technically, photos are unaltered digital images produced by a camera, while the broader term *images* includes photos that have been altered to add text and special effects, as well as drawings and computer-generated pictures.

A *slideshow* is a series of photographs that illustrates a news event, showcases a variety of news events, or serves solely to entertain your publication's readers (as in the case of photos of scenery for example).

This chapter provides WCM users with instructions to perform the following tasks:

1. Browse and open photos or slideshows.

2. Configure and upload a photo.

3. Configure a slideshow and add photos to it.

4. Delete a photo or slideshow.

Note

To add related content links to a photo or slideshow, see the section called “Configure related content links for a content object”.

To add IPTC codes and tags to a photo or slideshow, see the section called “Configure IPTC codes and tags for a content object”.

To add Nfinder metadata tags to a photo or slideshow, see the section called “Configure metadata tags for a content object”

To attach photos to an article or news item, see the section called “Attach new photos to an article or news item” and the section called “Attach WCM photos to an article or news item”

Browse photos or slideshows

To browse photos or slideshows in your WCM database, and open a photo or slideshow, proceed as follows:

1. Log in to WCM.

2. From the WCM menu bar, choose **Browse>Photos** or **Browse>Slideshows**, as appropriate. The photos or slideshows will be displayed as shown below. Grid view is active by default.

   Photos in Grid view

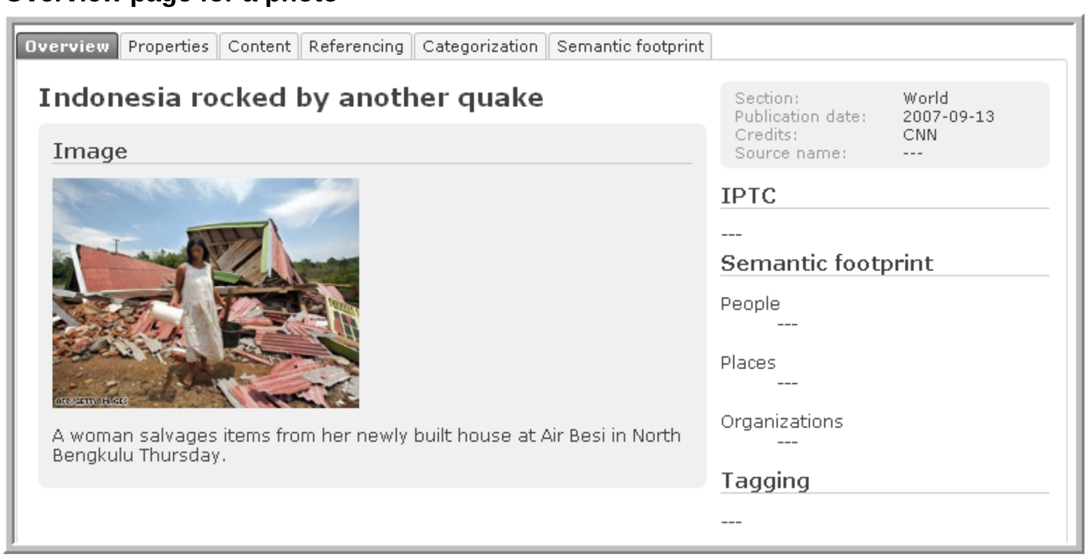
3. To open a photo or slideshow, click the pencil icon.

Note

For details on other display modes and navigation, see the section called “Search results navigation”

4. Click the **Overview** tab to display the **Overview** page. This page summarizes all the data for the current photo or slideshow, as shown below.

Overview page for a photo



Create a photo

WCM users can upload photos they have saved locally on their own PC or on the network. The photo upload process places a photo in the `[WCM root]\img\photos\biz` folder within the WCM file system. These photos are then available to be added to articles that have been created in WCM.

Note

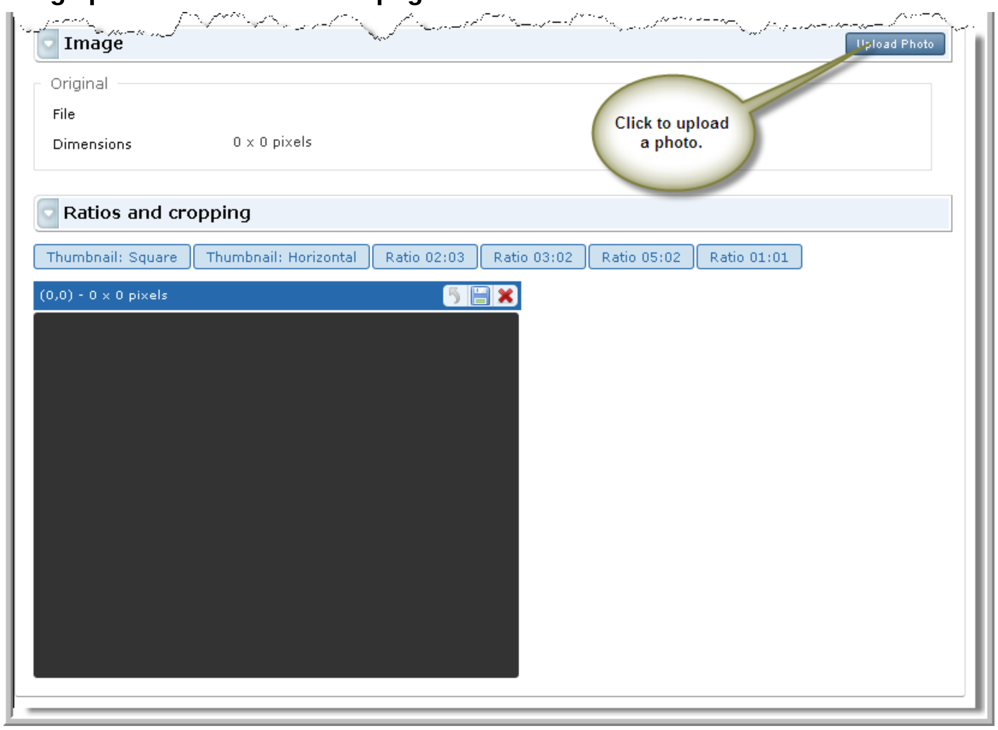
Before attempting this procedure, save a digital version of the photos you want to use on your PC or on your local area network (LAN).

1. Log in to WCM and choose a site.

2. From the menu bar, choose **Create>Photo** to open the **Photo** window.

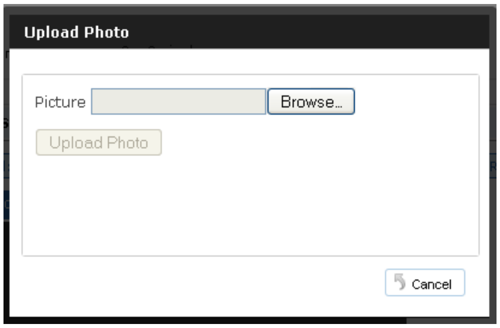
3. Click the **Content** tab to open the **Content** page, and scroll down to the **Image** portion of the page as shown below.

Image portion of the Content page



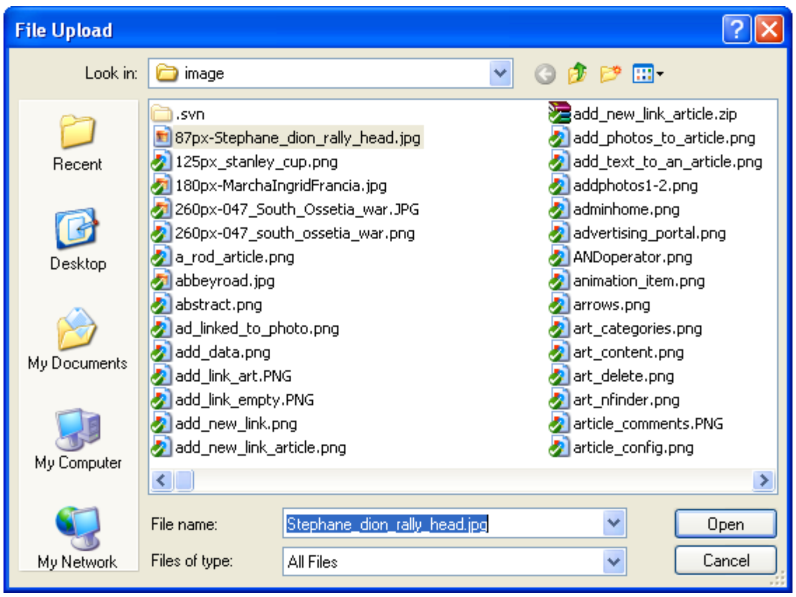
4. Click **Upload photo** to open the **Upload Photo** window shown below.

Upload Photo window



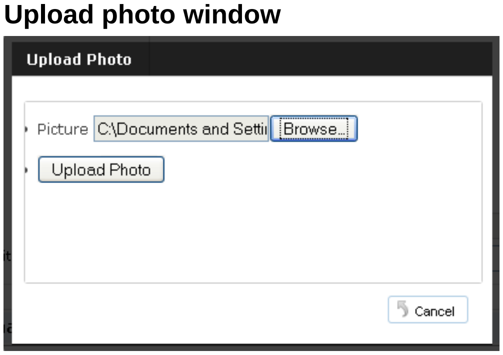
5. Click the **Browse** button. In the window that appears, locate the photo you wish to upload from your local or network folder, and click **Open**.

Open file window

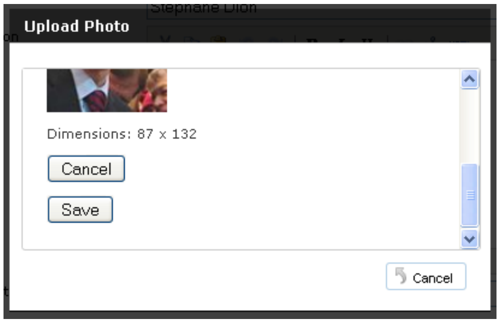


6. In the **Upload Photo** window, click **Upload photo**. The photo will appear in the window.

Upload photo window



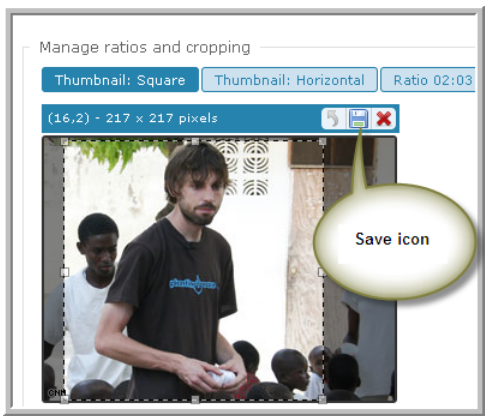
7. Click **Save** to save the photo as shown below.



8. To create a thumbnail, click **Thumbnail square** or **Thumbnail horizontal**. Drag the mouse to trace the outline of your thumbnail as desired.

> A *thumbnail* is a miniature version of a photo for display purposes. In WCM, thumbnails are used to display photos anywhere the user browses multiple photos and needs a handy visual clue as to the nature of a photo without opening it completely.

Creating a thumbnail



Tip

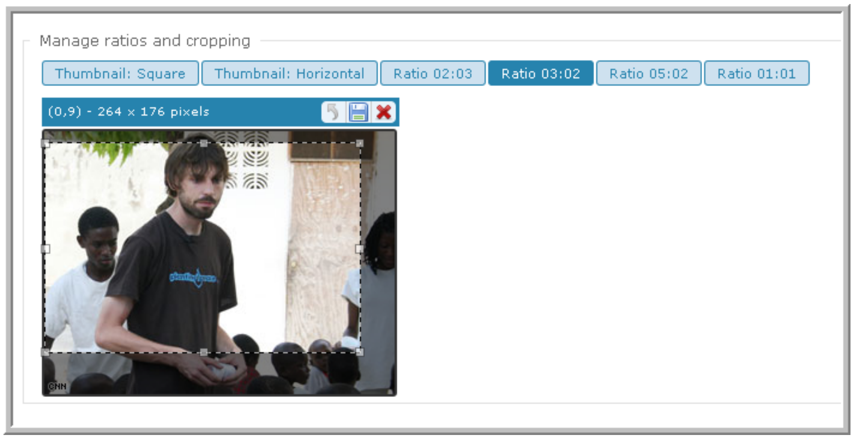
Select **Thumbnail: Square** for photos that are originally square, and **Thumbnail: Horizontal** for photos that are wider than they are tall, such as landscape type photos.

9. To save the thumbnail, click the save icon as shown in the screenshot above. The message **Ratio updated** will be displayed.

10. (Optional) To crop the photo, select one of the following:

- **Ratio 02:03** for a vertical rectangular crop zone;
- **Ratio 03:02** for a horizontal rectangular crop zone as shown in the example below;
- **Ratio 05:02** for a narrow horizontal crop zone;
- **Ratio 01:01** for a perfectly square crop zone.

Cropping a photo



Note

Feel free to experiment with the various ratio buttons--no changes are made until you click the Save icon.

11. Click the **Save** icon to save your cropped photo. The message **Ratio updated** will be displayed.

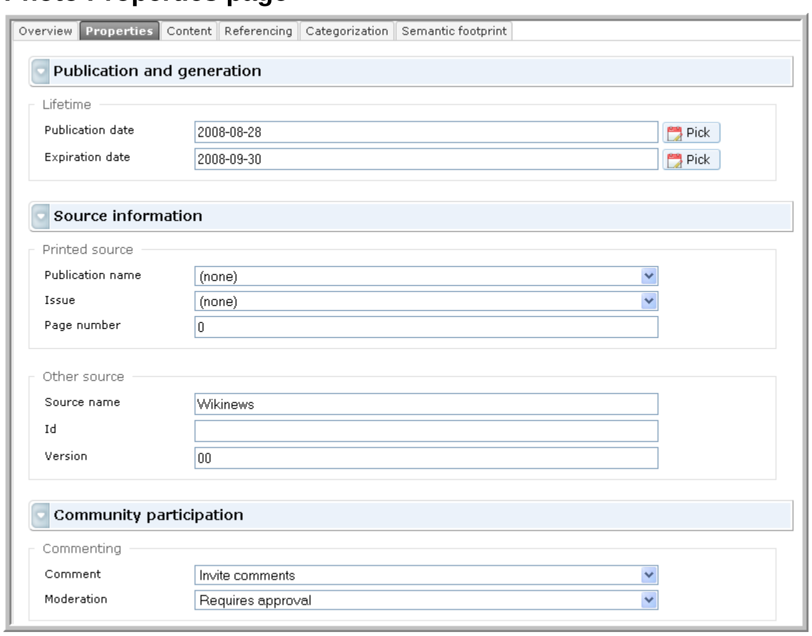
12. To save all your photo configuration settings, click the **Save** button at the top of the **Photo** window.

Configure photo properties

To configure photo properties, proceed as follows:

1. Click the **Properties** tab to open the **Properties** page as shown below.

Photo Properties page



2. Beside **Publication date**, click **Pick** and use the pop-up calendar to select a publication date. Beside **Expiration date**, perform the same action to schedule when the photo will cease to appear online.

   ### Note

   Expiration dates are not always taken into consideration in the templates used to generate Web content. Typically templates are set up to loop in recent content (for example, where Publication date = last 7 days); once the publication date no longer meets that criteria, it is replaced by other content in the section pages for the publication. (However, as long as the content remains on the server, it can still be accessed through a search engine.)

3. If the photo originally appeared in a print publication, select the **Publication name** and **Issue** from the lists provided. Beside **Page number**, enter a page number.

   ### Tip

   The **Publication name** and **Issue** lists are populated with user-entered data. To add a print publication to the list, select **Manage>Publications**. To add an issue to the list, select **Manage>Issues**.

4. If the photo originally appeared on the Web, enter the Web publication name in which it appeared beside **Source name**.

   - Beside **Id**, enter the Web publication's ID. For example, if your company has assigned IDs to its commonly used sources, you could enter that information here.
   - Beside **Version**, enter the version number for the original print publication.

5. Beside **Contribution**, select one of the following:

   - **Don't invite contributions**, if you don't wish to receive comments from readers.
   - **Invite contributions** to invite readers to comment on the photo.

     ### Note

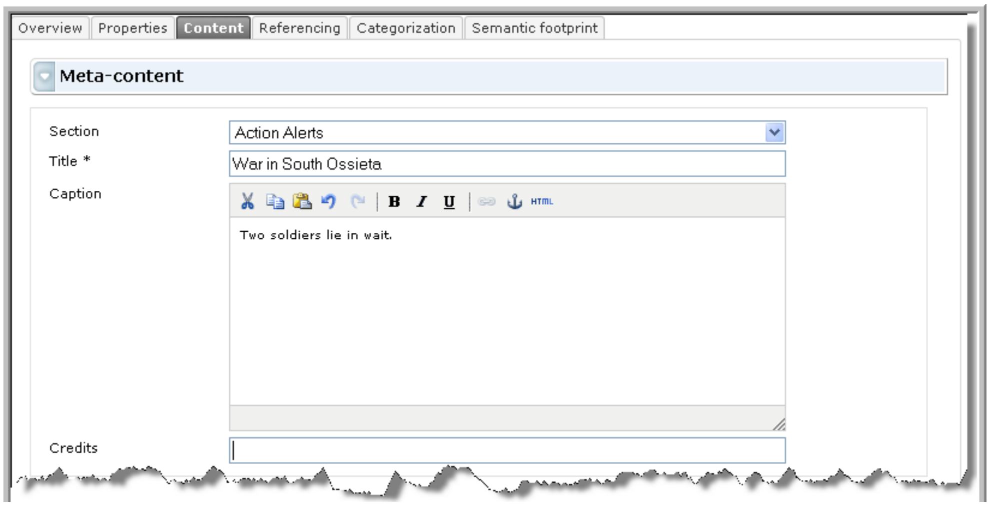
     The **Locked** option is relevant only after publication, to discontinue an invitation so that readers can no longer submit comments.

6. If you selected **Invite contributions** in the previous step, choose one of the following beside **Moderation**:

   - **Requires approval**, if readers' comments must be approved before being published;
   - **Automatically publish**, to have readers' comments published immediately upon submission.

7. Click the **Content** tab to open the **Content** page as shown below.

   Content page for a photo



8. Beside **Section**, choose the section where your photo will appear.

Tip

If you don't see the section required, create a section.

9. Beside **Title**, enter a descriptive title for the photo. The photo title will appear in search results when you search for the photo.

10. Beside **Caption**, enter the caption to be used with the photo.

11. Beside **Credits**, enter the name of the photographer.

12. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

13. Proceed as described below to upload your photo.

Create a slideshow

Note

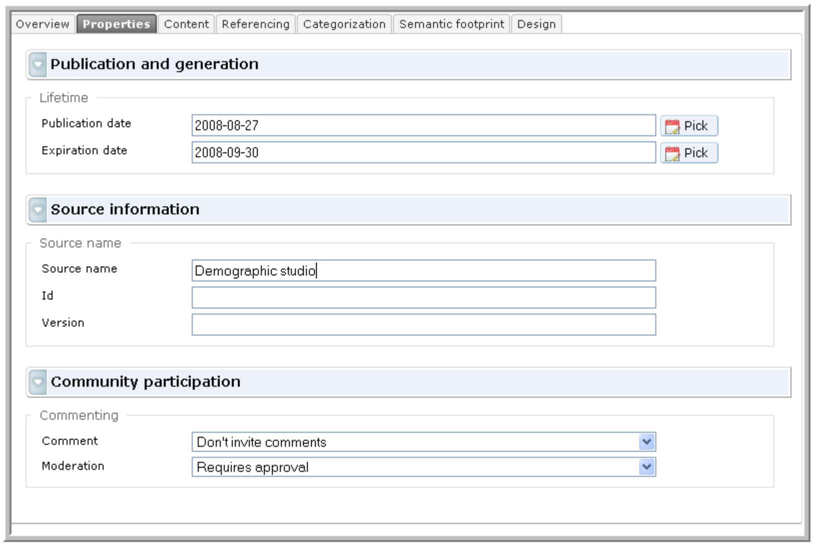
Before attempting the procedures in this section, create the photos that will be used in the slideshow.

To create a slideshow, proceed as follows:

1. Log in to WCM and choose a site.

2. From the menu bar, choose **Create>Slideshow** to open the **Slideshow** window. Click the **Properties** tab to open the **Properties** page as shown below.

   Properties page for a slideshow



3. Beside **Publication date**, click the calendar icon and select a date to schedule when the slideshow will appear online. Beside **Expiration date**, perform the same action to schedule when the slideshow will cease to appear online.

   ### Note

   Expiration dates are not always taken into consideration in the templates used to generate Web content. Typically templates are set up to loop in recent content (for example, where Publication date = last 7 days); once the publication date no longer meets that criteria, it is replaced by other content in the section pages for the publication. (However, as long as the content remains on the server, it can still be accessed through a search engine.)

4. If the slideshow has previously appeared online, beside **Source name**, enter the source of the slideshow.

   - Beside **Id**, enter the source's ID. For example, if your company has assigned IDs to its commonly used sources, you could enter that information here. If your company has no assigned IDs for its sources, leave this field blank.

   - Beside **Version**, enter the version number for the original slideshow, or leave blank if not applicable.

5. Beside **Contribution**, select one of the following:

   - **Don't invite contributions**, if you don't wish to receive comments from readers.

   - **Invite contributions** to invite readers to comment on the slideshow.

     ### Note

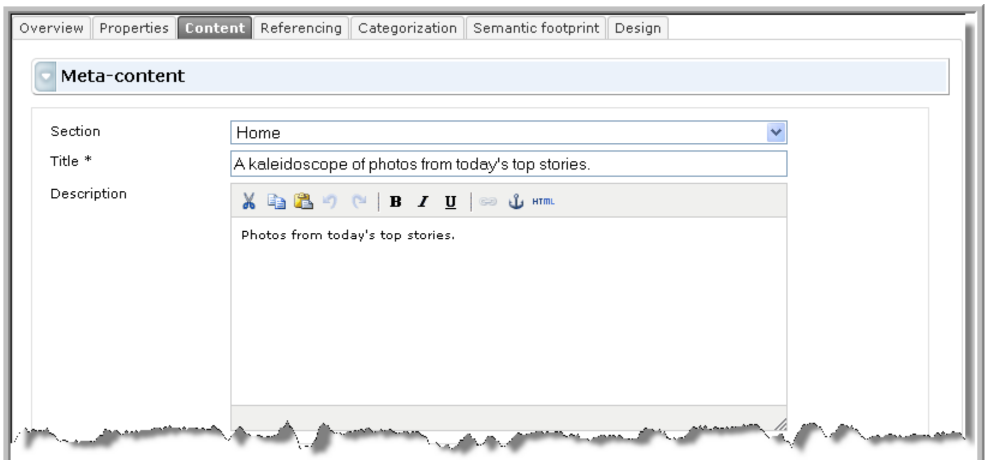
     The **Locked** option is relevant only after publication, to discontinue an invitation so that readers can no longer submit comments.

6. If you selected **Invite contributions** in the previous step, choose one of the following beside **Moderation**:

- **Requires approval**, if readers' comments must be approved before being published;
- **Automatically publish**, to have readers' comments published immediately upon submission.

7. Click the **Content** tab to open the **Content** page as shown below.

   Slideshow content



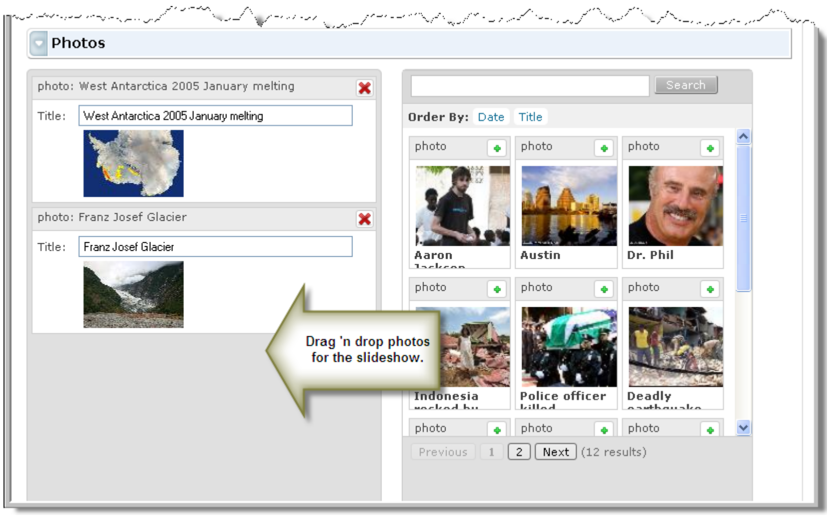
8. Beside **Section**, choose the section in which your slideshow will appear.
9. Beside **Title**, enter a descriptive title for the slideshow.
10. Beside **Description**, enter a description of the slideshow.
11. Select **Save** or **Check-in** (according to your selected lock mode) to save your slideshow configuration.
12. Proceed as described below to add photos to the slideshow.

Add photos to a slideshow

To add photos to a slideshow, proceed as follows:

1. Locate the slideshow you created previously and if necessary click **Check-out** to open it.
2. Click the **Content** tab to open the **Content** page. Scroll down to the **Photos** portion of the page as shown below.

   Slideshow photos



3. In the **Search** field, enter a keyword related to your slideshow's theme. For example, if you are creating a "Top Stories" collection, and the summer Olympics are currently a hot news item, you might enter "Olympics" as your keyword.

Tip

For search tips, see Chapter 2, *Searches and Queries*.

4. Click **Search**. The content meeting your search criteria will be displayed.

Tip

To sort your results by date, (useful for a "today's top stories" type collection) click **Date** beside **Order by**. To sort by title, click **Title**.

5. To add a photo to your article or news item, drag it to the left pane or click the plus sign as shown above. Repeat to add additional photos if desired.

6. Edit the slideshow photos as follows:

   - Add titles to the photos or modify the existing titles if desired.
   - To change the order of the photos, drag a photo up or down in the left pane.
   - To delete a photo from the slideshow, click the X in the top right of the photo frame.

7. Select **Save** or **Check-in** (according to your selected lock mode) to save your slideshow configuration and photos.

Delete a photo or slideshow

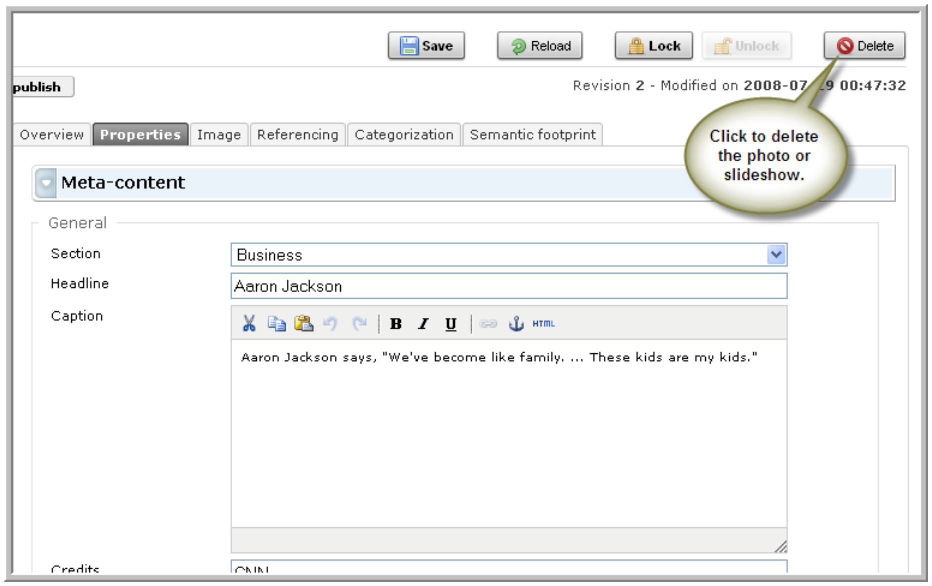
Deleted photos and slideshows are removed from the database; however, they will continue to be displayed online until the site content is re-generated.

To delete a photo or slideshow, proceed as follows:

1. Use the browse function or perform a search to locate the photo or slideshow you wish to delete, and click the pencil icon to open it.

2. Click the **Delete** button as shown below. The photo or slideshow is immediately removed from the database.

Deleting a photo or slideshow



Chapter 4. Articles and News Items

An *article* is a text that appears in a Web publication. Articles can take the form of editorials, human interest stories, news stories, and a wide range of other forms deemed of potential interest to the publication's target audience.

A *news item*, also known as a "news brief," is a pithy news synopsis.

This chapter provides WCM users with instructions to perform the following tasks:

1. Browse and open articles or news items.
2. Create an article and configure article properties.
3. Manage versions of an article as follows:
   - Create a version of an article.
   - Delete a version of an article.
   - Restore a version of an article.
4. Create a news item.
5. Add photos to an article or news item.
6. Design page layout for an article.
7. Preview an article.
8. Delete an article or news item.

Note

To add related content links to an article or news item, see the section called “Configure related content links for a content object”.

To add IPTC codes and tags to an article or news item, see the section called “Configure IPTC codes and tags for a content object”.

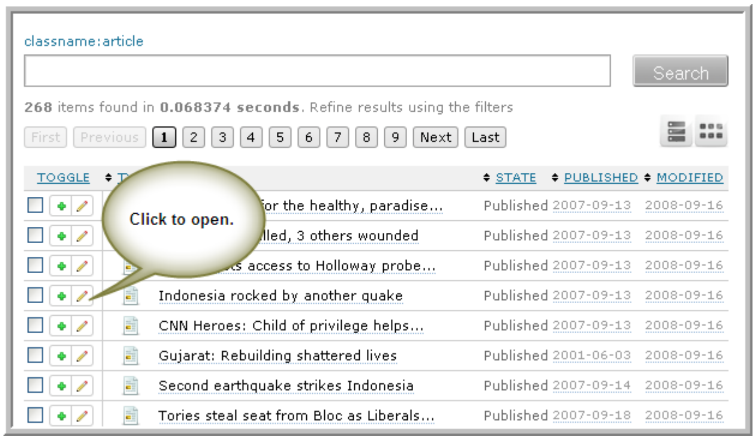
To add Nfinder metadata tags to an article or news item, see the section called “Configure metadata tags for a content object”.

Browse articles or news items

To browse articles or news items in your WCM database, and open an article or news item, proceed as follows:

1. Log in to WCM.
2. From the WCM menu bar, choose **Browse>Articles** or **Browse>News items**, as appropriate. The articles or news items will be displayed as shown below. List view is active by default.

Articles in List view



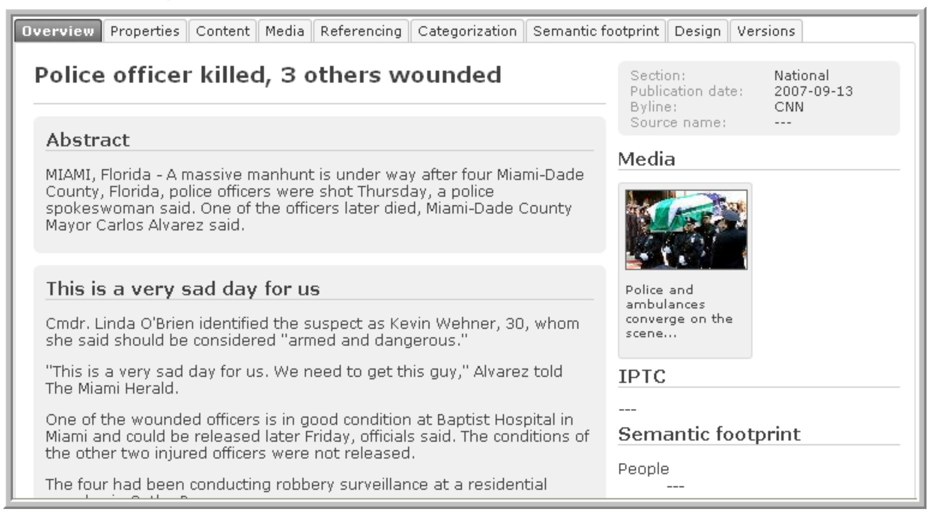
3. To open an article or news item, click the pencil icon.

Note

For details on other display modes and navigation, see the section called “Search results navigation”

4. Click the **Overview** tab to display the **Overview** page. This page summarizes all the data for the current article or news item, as shown below.

Overview page for an article



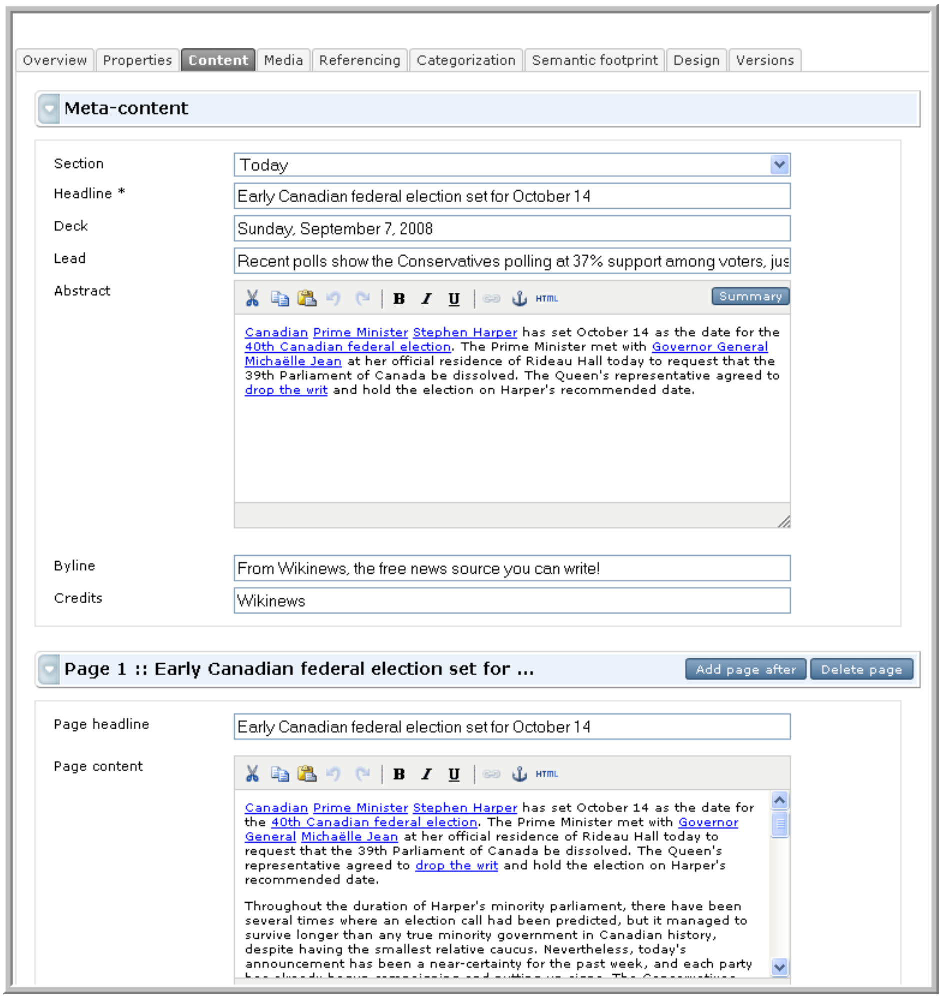
Create an article

To create an article, proceed as follows:

1. Log in to WCM and choose a site.

2. From the menu bar, choose **Create>Article** to open the **Article** window. Click the **Content** tab to display the **Content** page as shown below.

Article window, Content page



3. Beside **Section**, choose the section in which your article will appear.

4. Beside **Headline**, enter the headline for the story.

5. Beside **Deck**, enter a subhead to appear directly under the headline.

6. Beside **Lead**, enter text that will serve as a lead sentence for the article (or, simply paste the headline in this space). If your templates provide for them, leads can be used as hyperlinks to articles.

7. Beside **Abstract**, enter or paste an abstract for the article. You can enter simple text using the default text editor. However, if you wish to enter the abstract using HTML, click the **HTML** editor button as shown in the screenshot above.

Tip

Click the **Summary** button to obtain a TME-generated summary that you can use for your abstract.

8. Beside **Byline**, enter the byline of the author of the story.

9. Beside **Credits**, enter the source of the story. For example, if the story first appeared in the "Citizens on Fire" blog, you would enter that information.

Note

The credit is not always the same as the source. For example, if the story was first told on a news interview, then the credits go to the station that aired the story. However, the interview may subsequently been printed up in The Enquirer newspaper, then that publication is the source of the story.

10. Beside **Page headline**, enter a headline for the first page of your article. Page headlines usually appear at the top of each page.

Tip

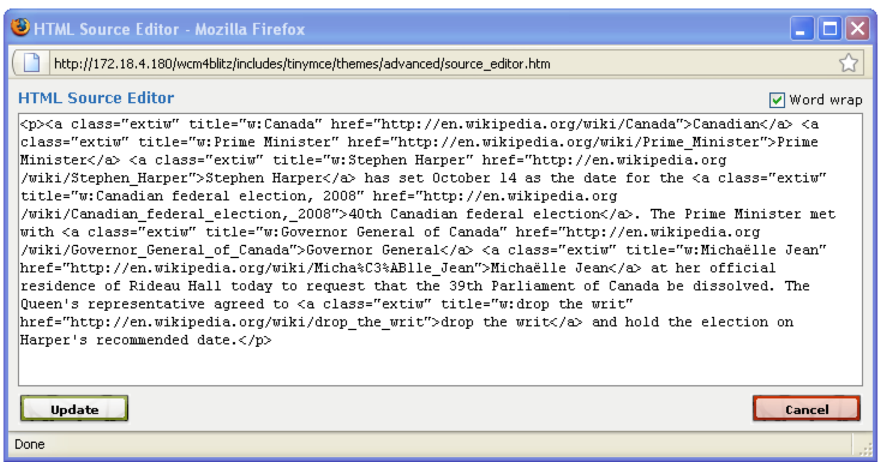
The pages of an article, like chapters of a book, are used to "chunk" a large text into topics. If your article is fairly short, only one page is needed. There is no set word count for article pages. If the text spans more than one page, the page headline will often (depending on template layout) be listed as links on the first page of the published article.

11. Beside **Page content**, enter the text of the first page of the article. By default, one can enter text in the space provided in plain text format.

Tip

You can enter the page content in HTML if you wish to include tables or other formatting. To do so, click the HTML icon to open the **HTML Source editor** window, as shown below. When you are done, click **Update** to return to the **Content** page.

HTML Source editor window



12. To add an additional page, click **Add page after** and repeat from Step 10. Repeat until you have entered the complete text of the article.

13. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

Configure article properties

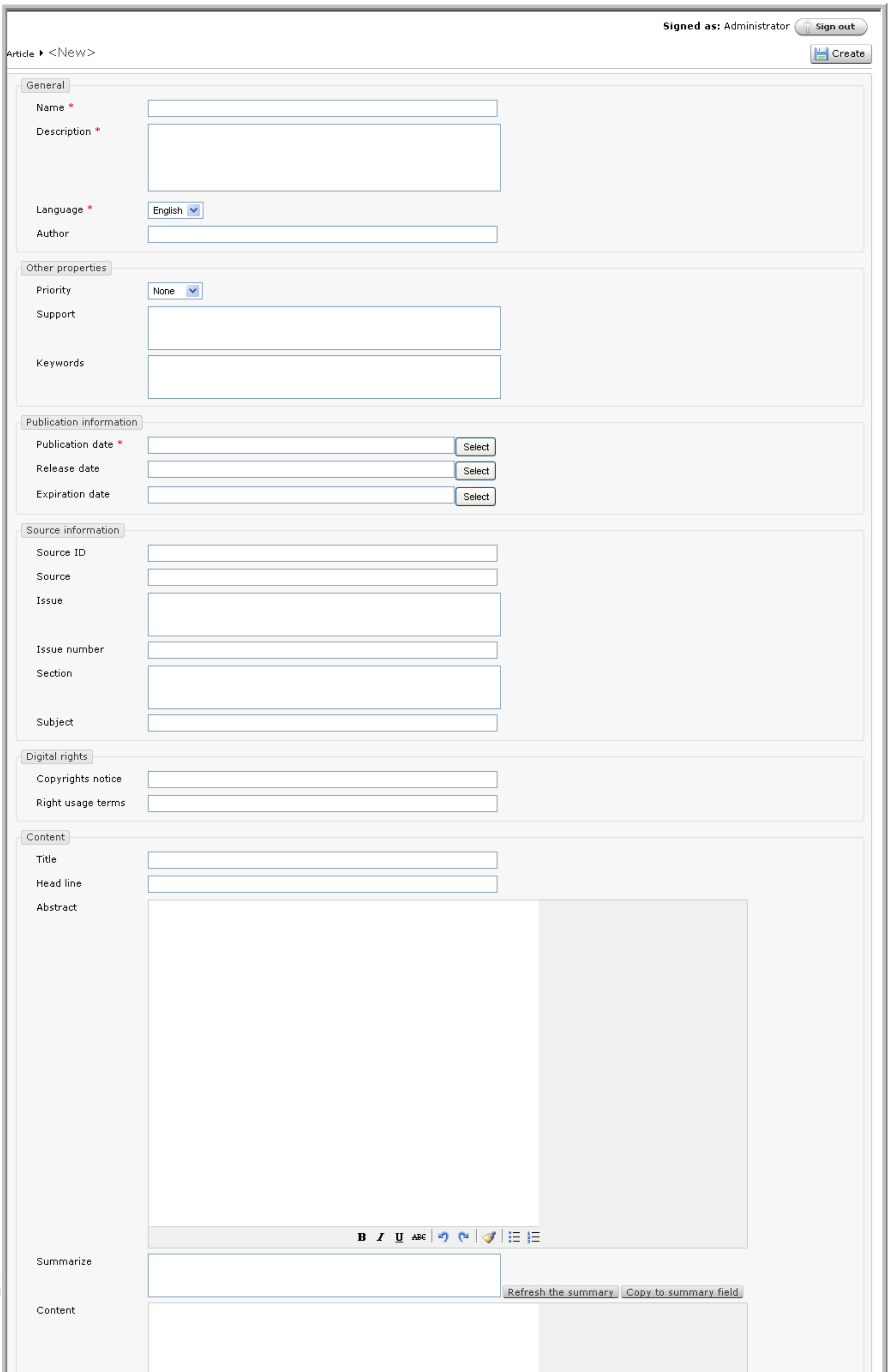
To configure article properties, such as publication date, proceed as follows:

1. Create an article as described previously.

2. If necessary, click **Check-out** to open the article for editing.

3. In the **Article** window, click the **Properties** tab to display the **Properties** page as shown below.

   Article window, Properties page


Signed as: Administrator
Sign out
Article <New>
Create
General
Name *
Description *
Language *
English
Author
Other properties
Priority
None
Support
Keywords
Publication information
Publication date *
Select
Release date
Select
Expiration date
Select
Source information
Source ID
Source
Issue
Issue number
Section
Subject
Digital rights
Copyrights notice
Right usage terms
Content
Title
Head line
Abstract
Summarize
Refresh the summary
Copy to summary field
Content

4. Beside **Publication date**, click **Pick** and use the pop-up calendar to select a publication date. Beside **Expiration date**, perform the same action to schedule when the article will cease to appear online.

   ### Note

   Expiration dates are not always taken into consideration in the templates used to generate Web content. Typically templates are set up to loop in recent content (for example, where Publication date = last 7 days); once the publication date no longer meets that criteria, it is replaced by other content in the section pages for the publication. (However, as long as the content remains on the server, it can still be accessed through a search engine.)

5. **Printed Source**: If the article originally appeared in a print publication, select the **Publication name** and **Issue** from the lists provided. Beside **Page number**, enter a page number. If the article has never appeared in print form, ignore these fields.

   ### Tip

   The **Publication name** and **Issue** lists are populated with user-entered data. To add a print publication to the list, select **Manage>Publications**. To add an issue to the list, select **Manage>Issues**.

6. **Other Source**: If the article originally appeared on the Web, or in some other format, enter the source name beside **Source**.

   - Beside **Source ID**, enter the ISSN or other ID for the source in the previous step.
   - Beside **Version**, enter the source publication's version number, if applicable or enter the article date as a point of reference.

7. Beside **Contribution**, choose one of the following:

   - **Don't invite contributions** if you don't wish to invite readers to comment on the article.
   - **Invite contributions** if you wish to invite readers to comment on the article.

   ### Note

   The **Locked** option can be selected after the article is published, to prevent readers from commenting further on an article with an **Invite contributions** status.

8. If you selected **Invite contributions** in the previous step, choose one of the following beside **Moderation**:

   - **Requires approval**, if readers' comments must be approved before being published;
   - **Automatically publish**, to have readers' comments published immediately upon submission.

9. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

Next steps:

- To add photos to your article, click here.

Create a version of an article

The WCM versioning feature allows users to create more than one version of an article to have on hand in case they are needed. Thus, if an editor makes additions to an article and a research assistant subsequently finds those changes to be erroneous, the correct version can be restored.

To create a version of an article, proceed as follows:

1. Create or edit the article.
2. Save your changes.
3. In the article window, click the **Versions** tab to open the **Versions** page as shown below.

Creating an article version

4. Click the **Save and create new version** button. A new version will be created and displayed under **Version history**.

Delete a version of an article

To delete a version and all versions subsequent to it, proceed as follows:

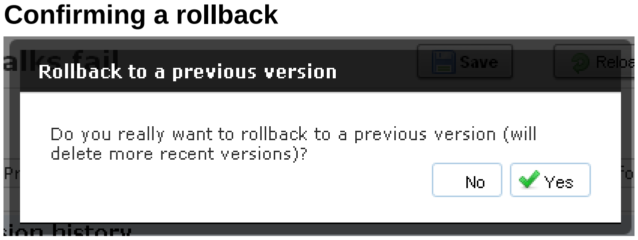
1. Click the **Rollback** button beside the version you wish to delete.

Caution

The version you select, as well as versions created after it, will be deleted.

2. In the confirmation window that appears, click **Yes** as shown below.

Confirming a rollback

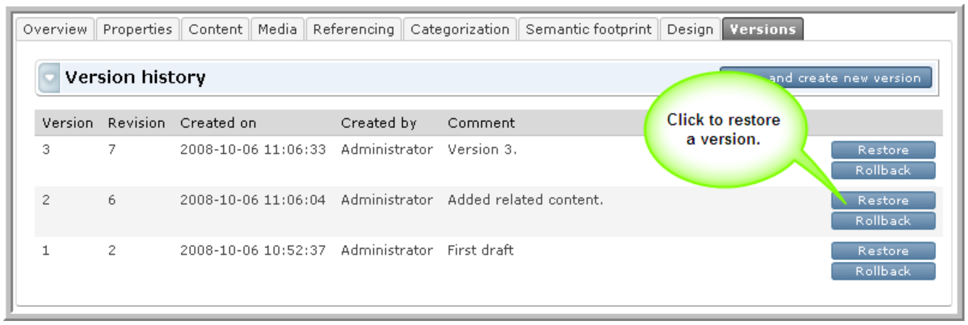


Restore a previous version of an article

To restore a previous version of an article, proceed as follows:

1. Click the Restore button beside the version you wish to restore, as shown below.

Restoring a previous version of an article



2. In the confirmation window, click **Yes** to confirm as shown below.

Restore confirmation

3. The selected version will be restored.

Note

The versions created before and after the selected version will still be available, but the content and parameters that were set for the selected version will be displayed in the various **Article** pages.

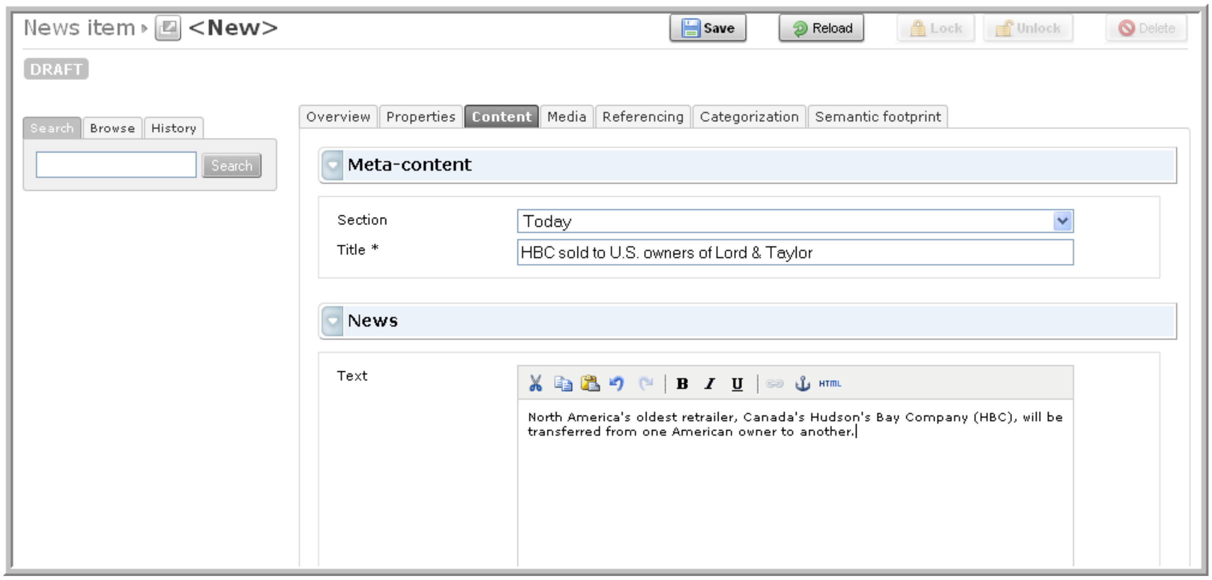
Create a news item

To create a news item, proceed as follows:

1. Log in to WCM and choose a site.

2. From the WCM menu bar, choose **Create>News item** to open the **News item** window. Click the **Content** tab to open the **Content** page as shown below.

News item window, Content page



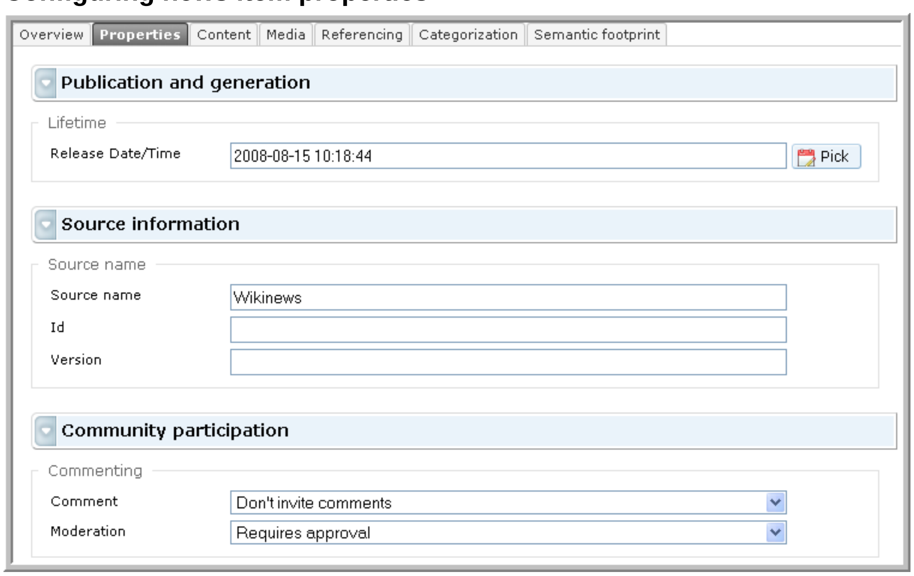
3. Beside **Section**, choose the section in which your news item will appear.

4. Beside **Title**, enter the headline that will appear above the news item.

5. Beside **Text**, enter the text of your news item.

6. Click the **Properties** tab to open the **Properties** page as shown below.

Configuring news item properties



7. Beside **Publication date**, click **Pick** and use the pop-up calendar to select a publication date. Beside **Expiration date**, perform the same action to schedule when the news item will cease to appear online.

Note

Expiration dates are not always taken into consideration in the templates used to generate Web content. Typically templates are set up to loop in recent content (for example, where Publication date = last 7 days); once the publication date no longer meets that criteria, it is replaced by other content in the section pages for the publication. (However, as long as the content remains on the server, it can still be accessed through a search engine.)

8. Beside **Source name** enter the name of the source of the news item, if applicable. (For example, a source might be a Web publication or an RSS feed.)

   - Beside **Id**, enter the source's ID, if applicable.

   - Beside **Version**, enter the source's version number, if applicable.

9. Beside **Comment**, choose one of the following:

   - **Don't invite comments** if you don't wish to invite readers to comment on the news item.

   - **Invite comments** if you wish to invite readers to comment on the news item.

   ### Note

   The **Locked** option can be selected after the news item is published, to prevent readers from commenting further on a news item with an **Invite comments** status.

10. If you selected **Invite comments** in the previous step, choose one of the following beside **Moderation**:

    - **Requires approval**, if readers' comments must be approved before being published;

    - **Automatically publish**, to have readers' comments published immediately upon submission.

11. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

Attach new photos to an article or news item

Important

Use this procedure for new photos that you have saved to your PC or local area network, but that are not yet created in WCM. Otherwise, to use photos that you have previously uploaded to WCM, see the section called “Attach WCM photos to an article or news item”

Note

Before attempting this procedure, you must have created an article and its text, or created a news item, as applicable.

To add photos to an article or news item, proceed as follows:

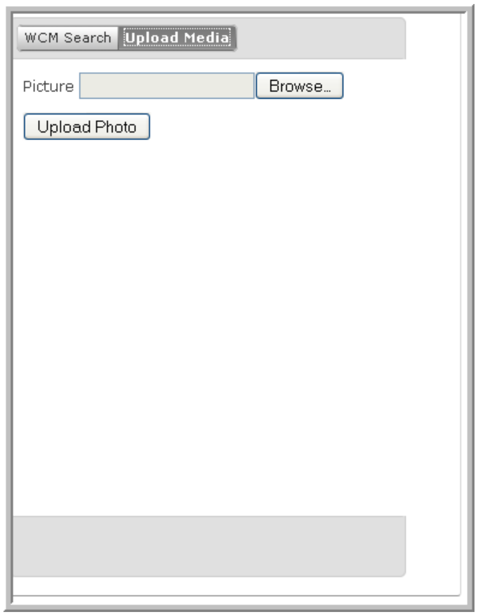
1. Browse or search for your article or news item to retrieve it.

2. If necessary, click **Check-out** to open the article or news item for editing.

3. Click the **Media** tab to open the **Media** page.

4. To browse for a photo on your network, click the **Upload Media** tab to activate the **Upload Media** pane as shown below.

Upload Media pane

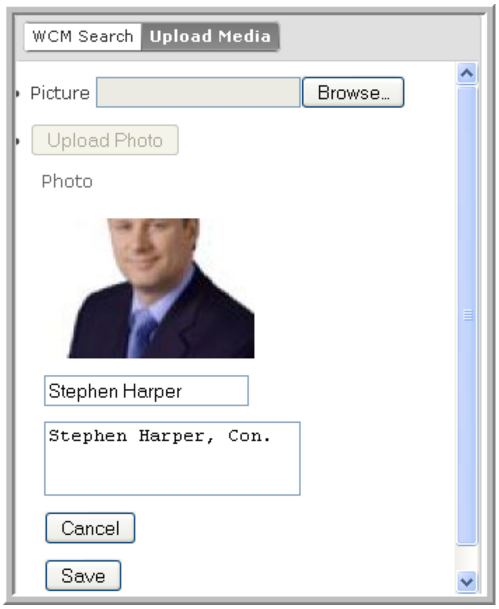


5. Click the **Browse** button and select the file to upload; in the window that appears, browse to locate your artice; select **Open** to select the photo.

6. In the **Upload Media** pane, click **Upload Photo**.

7. Add a title and a caption in the spaces provided.

Uploading a photo



Caution

If you do not enter a title in the space provided, the photo will not be uploaded.

8. In the **Upload Media** pane, click **Save**.

The photo object is created and saved in `[WCM root]\img\photos\biz\`. A thumbnail is generated.

9. Repeat from Step 5 to add additional photos if desired.

10. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to update your article or news item to include the selected photos.

11. To set up a list of related content for your article or news item, click here.

Attach WCM photos to an article or news item

Important

Use this procedure for photos that have already been created in WCM. Otherwise, see the section called “Attach new photos to an article or news item”

Note

Before attempting this procedure, you must have created an article and its text, or created a news item, as applicable.

To add WCM photos to an article or news item, proceed as follows:

1. Browse or search for your article or news item to retrieve it.

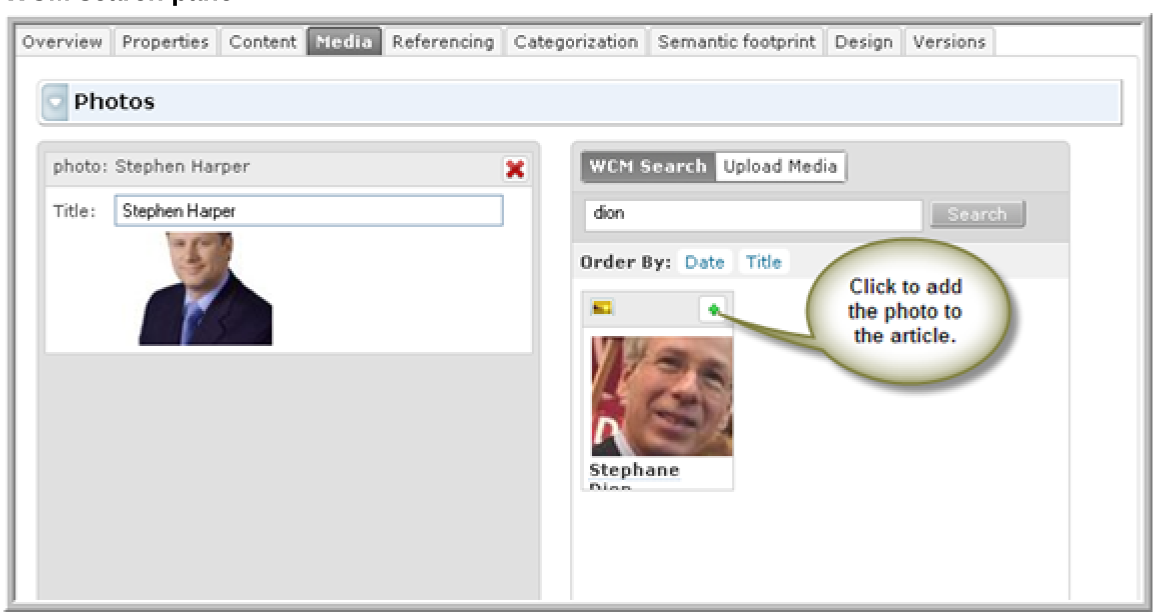
2. If necessary, click **Check-out** to open the article or news item for editing.

3. Click the **Media** tab to open the **Media** page.

4. Click the **WCM Search** tab to activate the **WCM search** pane as shown below.

5. In the **Search** field, enter a keyword related to your article or news item, and click **Search**. The photos meeting your search criteria will be displayed as shown below.

WCM search pane



Tip

For search tips, see Chapter 2, *Searches and Queries*. If you enter nothing in the search field, clicking **Search** will retrieve all photos in the database.

To sort your results by date, click **Date** beside **Order by**. To sort by title, click **Title**.

6. To add a photo to your article or news item, drag it to the left pane or click the plus sign as shown above. Change the photo caption if desired.

7. Repeat the previous step to add additional photos if desired.

8. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to update your article or news item to include the selected photos.

9. To set up a list of related content for your article or news item, click here.

Design article page layout

An *article page* is a stand-alone page that appears when a Web user clicks a link to an article. *Article page layout* controls the number of columns used for your article page, and the links (if any) that appear within the article page.

Widgets are code modules that represent TME-generated metadata and other content.

Note

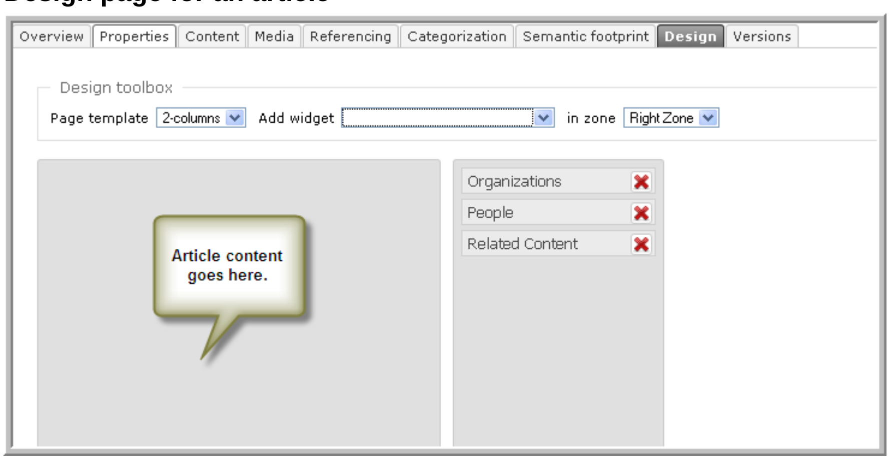
This procedure applies only to articles. News items are laid out according to the instructions in the section page template, or they could have their own templates.

To design article page layout, proceed as follows:

1. Browse or search for the article and open it. Check it out if necessary.

2. Click the **Design** tab to open the **Design** page as shown below.

Design page for an article



3. Beside **Page template**, select a 1-column, 2-column or 3-column layout for your article page. The grey area in the **Design** page will reflect the layout you select.

4. Beside **in zone**, select a zone in which to place the widgets.

5. Beside **Add widget**, select a widget for your article. It will immediately be placed in the zone you selected in Step 4.

   - To re-locate the metadata to another column in your article page layout, simply drag the widget to the desired location.

   - To delete a widget from the layout, click the X in the upper right of the widget.

6. When you are done, select **Save** or **Check-in** (according to your selected lock mode to save your article page layout.

Note

For instructions to create custom page templates, see the *WCM Developer's Guide*.

Preview an article

Note

Before attempting this procedure, be sure preview templates have been created. (Please refer to the *WCM Developer's Guide* for details. If you wish to preview a newly-created article, save the article first.

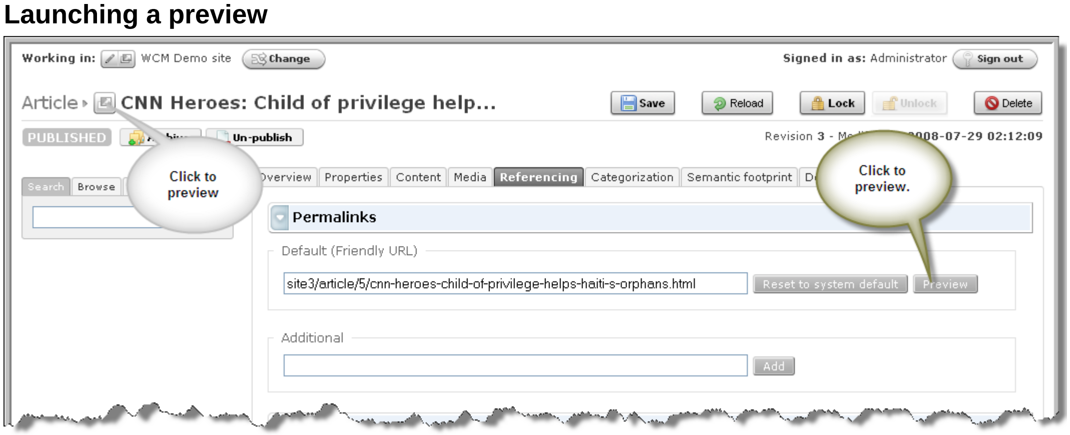
To preview an article, proceed as follows:

1. Browse or search to retrieve the article you wish to preview.

2. In the **Article** window, click the **Referencing** tab.

3. Click the **Preview** button or the preview icon, as shown below.

   Launching a preview



4. The article will be displayed in your browser, as shown below.

   Previewing an article

Caution

The appearance of the preview in this procedure will depend on your available preview templates, which are not necessarily identical to your generated article and section pages.

Delete an article or news item

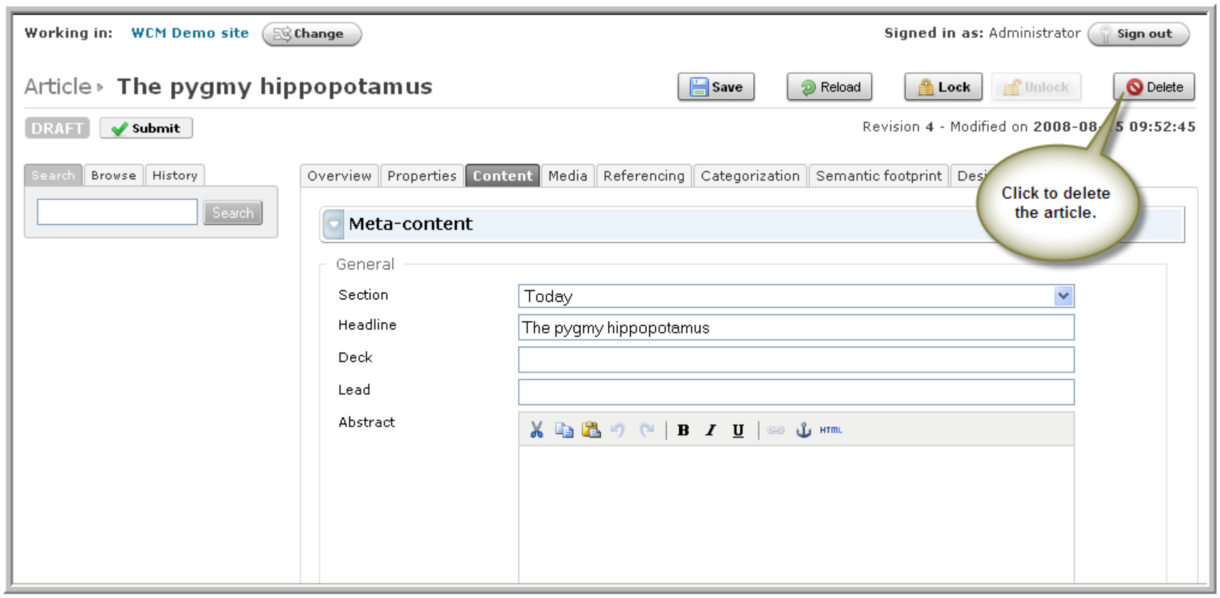
Deleted articles and news items are removed from the WCM database; however, they continue to be displayed online until the site content is re-generated, and are accessible through search engines thereafter. To delete articles or news items permanently from the Web server, a network administrator or developer could, for example, create a script to purge outdated content when the site is updated.

To delete an article or news item, proceed as follows:

1. Use the browse function or perform a search to locate the article or news item you wish to delete, and click the pencil icon to open it.

2. Click the **Delete** button as shown below. The article or news item is immediately removed from the database.

   Deleting an article


Working in: WCM Demo site
Change
Signed in as: Administrator
Sign out
Article The pygmy hippopotamus
Save
Reload
Lock
Unlock
Delete
DRAFT
Submit
Revision 4 - Modified on 2008-08 5 09:52:45
Search
Browse
History
Search
Overview
Properties
Content
Media
Referencing
Categorization
Semantic footprint
Click to delete the article.
Meta-content
General
Section
Today
Headline
The pygmy hippopotamus
Deck
Lead
Abstract

Chapter 5. Collections and Multimedia, PDF or HTML "Items"

This chapter provides WCM users with instructions to perform the following tasks:

1. Understand collections.
2. Browse collections or items.
3. Create a collection 'on the fly'.
4. Configure a collection and Add content to a collection.
5. Design collection page layout.
6. Configure and add multimedia items.
7. Configure and add HTML or PDF items.
8. Delete a collection or multimedia, PDF or HTML content.

Note

To add related content links to multimedia, PDF or HTML "items", see the section called “Configure related content links for a content object”.

To add IPTC codes and tags to a collection, see the section called “Configure IPTC codes and tags for a content object”.

To add metadata tags to a collection, see the section called “Configure metadata tags for a content object”.

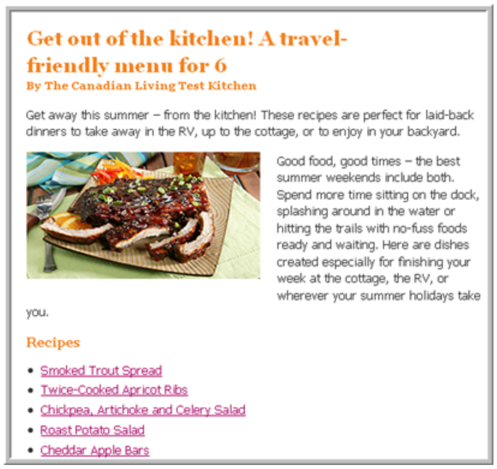
About collections

A *collection* is a set of content objects centered around a certain special theme, such as "Editor's picks" or "Top stories".

Collections use a collection page template that is usually called from within a section page template.

The screenshot below (copyright Canadian Living.com) shows a collection of recipes made with WCM. The title and description of the collection is displayed, with hyperlinks to the recipes.

Collection of featured recipes



Browse collections or items

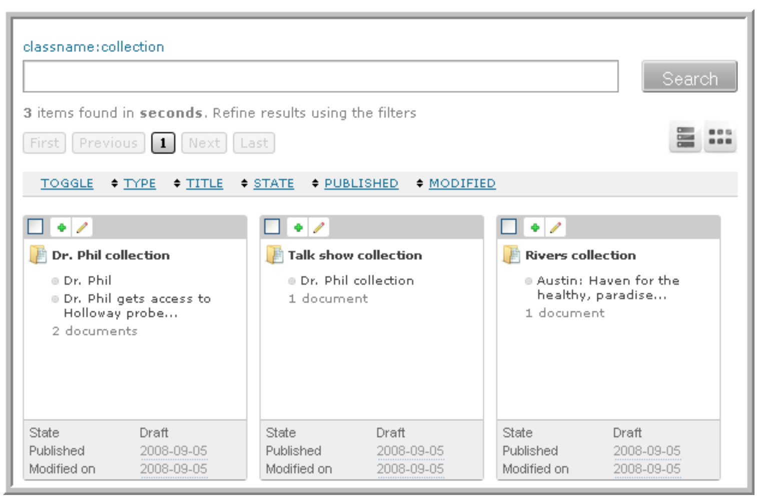
Item is a content type that represents any of the following content objects: video files, audio files, Flash animations, HTML and PDF documents.

To browse collections or items in your WCM database, and optionally open one to view it, proceed as follows:

1. Log in to WCM.

2. From the WCM menu bar, choose **Browse>Collections** or **Browse>Items**, as appropriate. Content for the class you selected will be displayed as shown below. For collections, Grid view is active by default; for items, List view is the default view mode.

   Collections in Grid view



3. To open a collection or item, click the pencil icon.

   ## Note

   For details on other display modes and navigation, see the section called “Search results navigation”

4. Click the **Overview** tab to display the **Overview** page. This page summarizes all the data for the current collection or item, as shown below.

Overview page for a collection

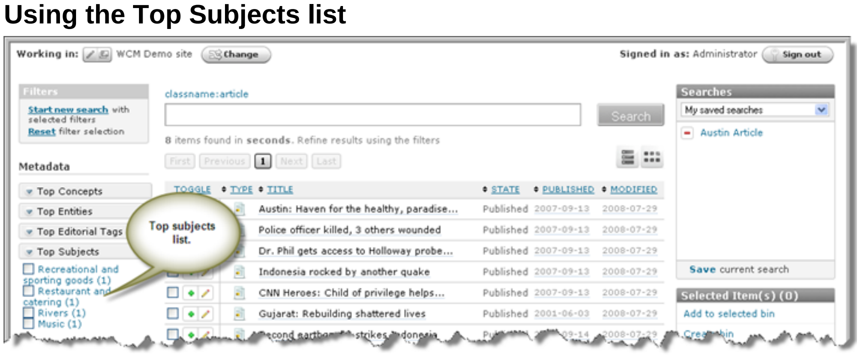
Create a collection 'on the fly'

The procedure below can be used to quickly create a collection from search results. This procedure is useful when one wants to earmark certain search results for future inclusion in a collection, without having to create the collection in advance.

To create a collection 'on the fly', proceed as follows:

1. Use one of the following methods to obtain a list of content for inclusion in your collection:
   - Run a saved search.
   - Perform a keyword search or an advanced search.
   - Use the browse function to obtain a list of objects, such as articles or photos.
2. If desired, apply a filter to the search results. In the example below, the user browsed articles and then opened the **Top Subjects** list.

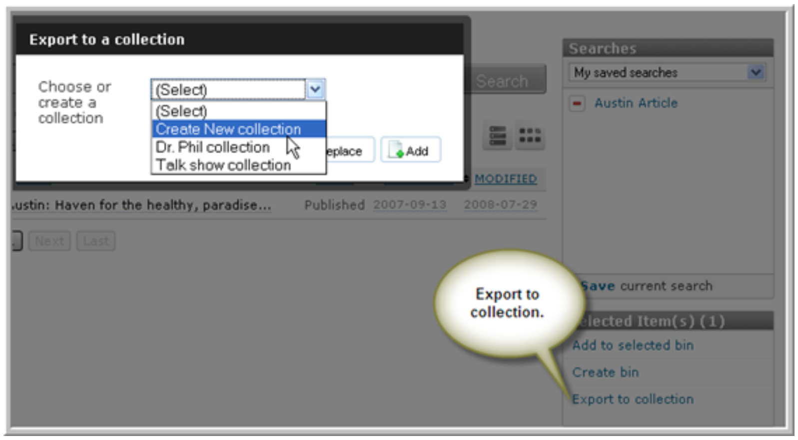
Using the Top Subjects list



3. Select the content objects for your collection from the search results, or from a list such as **Top Subjects** in the previous example.

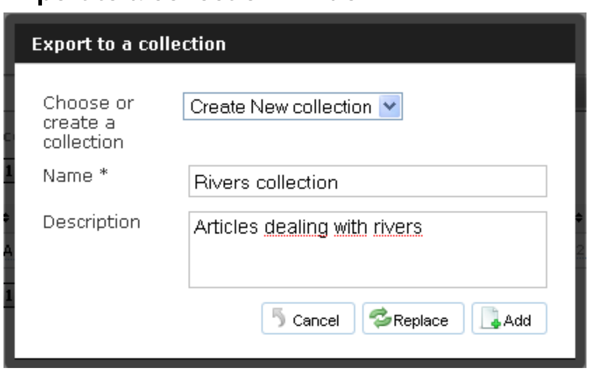
4. Click **Export to collection** to open the **Export to a collection** window shown below.

   Creating a collection 'on the fly'



5. Beside **Choose or create a collection**, select **Create New collection**.

   Export to a collection window



6. Beside **Name**, enter a name for the new collection.

7. Beside **Description**, enter a description.

8. Click **Add**.

9. Click **OK** in the confirmation window.

10. Your collection has been successfully created. You can add additional content to it any time by repeating this procedure from Step 1, and choosing your existing collection in Step 3.

Note

When you are ready to complete the collection, from the menu bar, choose **Browse>Collections** and locate the collection you just created. Refer to the the section called "Configure a collection" to configure it.

Configure a collection

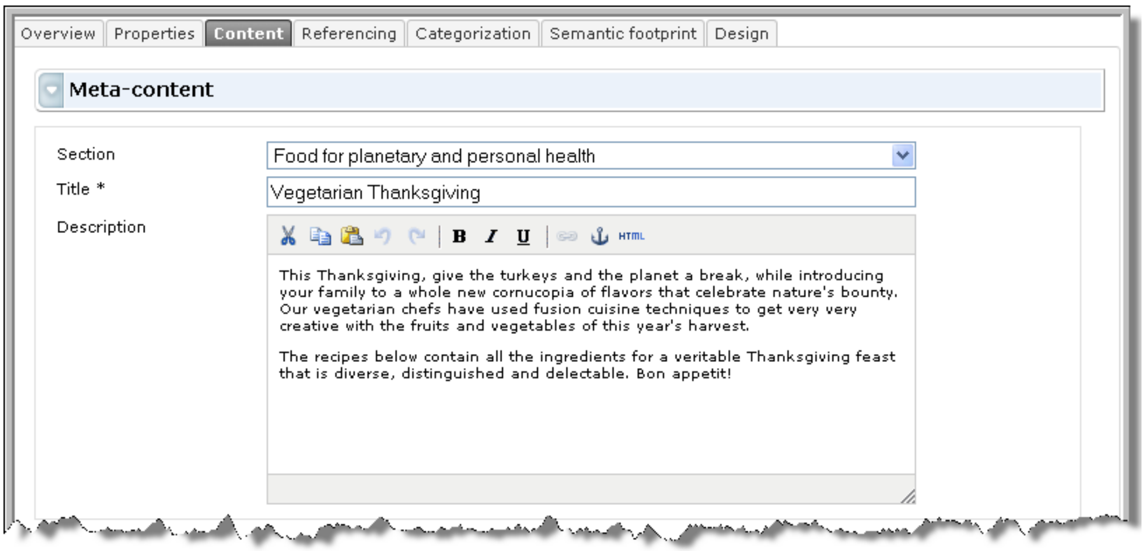
Note

Please read the section called “About collections” before beginning.

To configure a collection, proceed as follows:

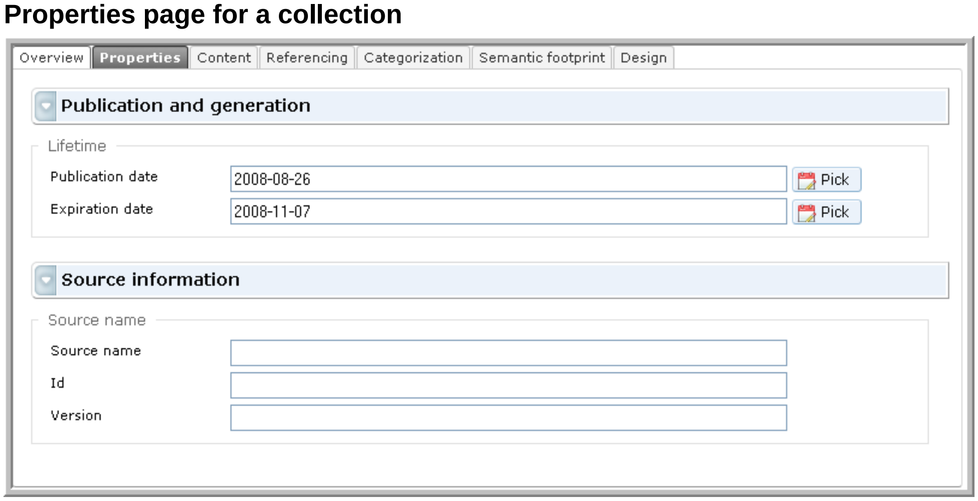
1. Log in to WCM and choose a site for the content you are about to create.
2. From the menu bar, choose **Create>Collection** to open the **Collection** window. The **Content** page is active by default, as shown below.

Content page for a collection



3. Beside **Section**, choose the section in which the collection will appear.
4. Beside **Title**, enter a descriptive title for your collection.
5. Beside **Description**, enter a description of the collection.
6. Click the **Properties** tab to open the **Properties** page, as shown below.

Properties page for a collection



7. Beside **Publication date**, click **Pick** and select a date to schedule when the collection will appear online. Beside **Expiration date**, perform the same action to schedule when the collection will cease to be accessible online.

   ### Note

   Expiration dates are not always taken into consideration in the templates used to generate Web content. Typically templates are set up to loop in recent content (for example, where Publication date = last 7 days); once the publication date no longer meets that criteria, it is replaced by other content in the section pages for the publication. (However, as long as the content remains on the server, it can still be accessed through a search engine.)

8. Under **Source Information**, fill in the source name, ID and version.

   ### Tip

   Refer to the individual content used in the collection for each content object's source name, ID and version.

9. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your collection configuration.

10. Add content to your collection, as described below.

Add content to a collection

You can add content to the collection in the form of videos, photos, articles, advertisements, and so on. Depending on the nature of the content you select and the template setup, it will be displayed directly (as in the case of photo thumbnails) or as hyperlinks (as in the case of videos).

Note

Before attempting this procedure, you must create a collection, if you have not already done so. You must also have created the articles, news items, photos, slideshows, or multimedia content you plan to use in your collection.

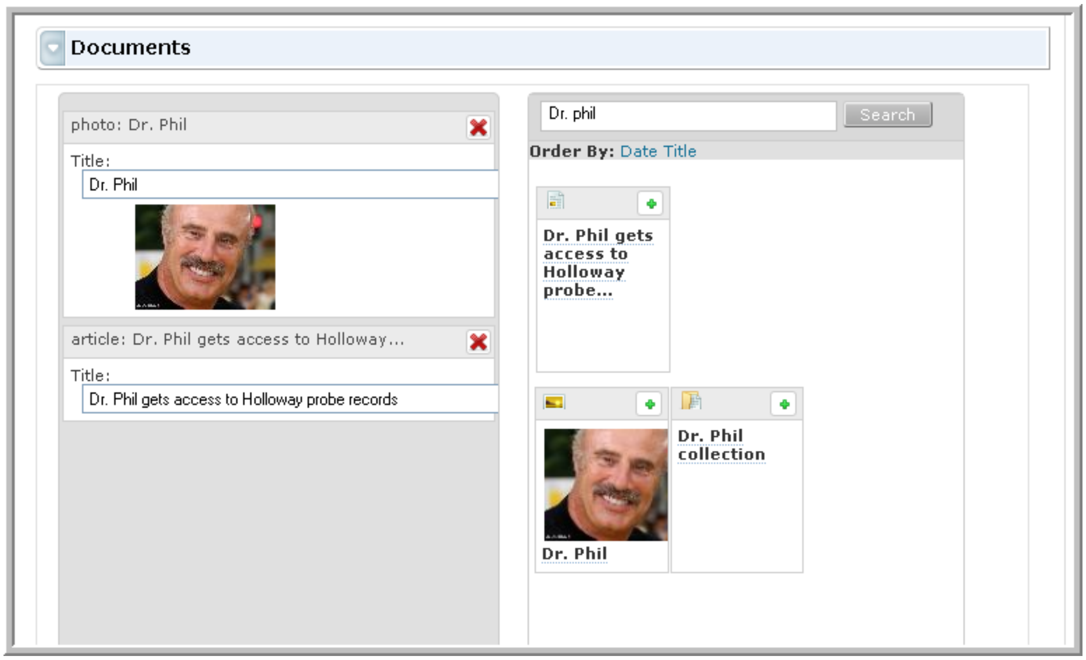
To add content to a collection, proceed as follows:

1. Browse or search for the collection to which you wish to add links, and open it.

2. If necessary, click **Check-out** to open the collection for editing.

3. Click the **Content** tab and scroll down to display the **Documents** portion of the page as shown below.

   Finding content for a collection



4. In the **Search** field, enter a keyword related to your collection's theme. For example, if you are creating a "Top Stories" collection, and the summer Olympics are currently a hot news item, you might enter "Olympics" as your keyword.

Tip

For search tips, see Chapter 2, *Searches and Queries*.

5. Click **Search**. The content meeting your search criteria will be displayed.

Tip

To sort your results by date, (useful for a "today's top stories" type collection) click **Date** beside **Order by**. To sort by title, click **Title**.

6. To add a content object to your collection, select it from your search results list and drag it to the left pane, or click the plus sign. Repeat to add additional content if desired.

7. Repeat steps 3 to 5 to locate and add additional content to your collection.

8. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your collection configuration.

Design collection page layout

A *collection page* is a stand-alone page that appears when a Web user clicks a link to one of the elements in a collection. *Collection page layout* controls the number of columns used for your collection page, and any links (in addition to the actual collection content) that appear within the collection page.

A collection with links to collection pages

Note

The collections presented on section pages are controlled by instructions within the section page template. For more information on designing a section page, see the section called “Design section layout using drag-and-drop widgets”, the *WCM Developer's Guide*, or the Nstein Support Network.

Note

This procedure applies only to collections. Items are laid out according to the instructions in the section page template. For PDF and HTML items, the layout is specified in the item configuration.

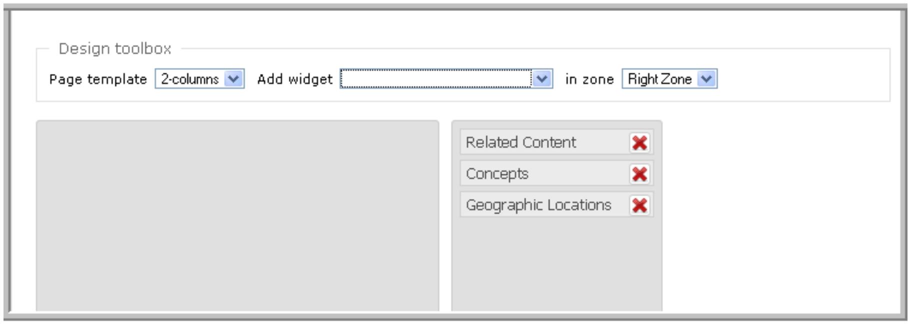
Widgets are code modules that represent TME-generated metadata and other content.

To design collection page layout, proceed as follows:

1. Browse or search for the collection and open it. Check it out if necessary.

2. Click the **Design** tab to open the **Design** page as shown below.

   Widgets for a collection



3. Beside **Page template**, select a 1-column, 2-column or 3-column layout for your collection page. The grey area in the **Design** page will reflect the layout you select.

4. Beside **in zone**, select a zone in which to place the widgets.

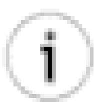
5. Beside **Add widget**, select a TME metadata category for your collection. It will immediately be placed in the zone you selected in Step 4.

   - To re-locate the metadata to another column in your article page layout, simply drag the widget to the desired location.

   - To delete a widget from the layout, click the X in the upper right of the widget.

6. When you are done, select **Save** or **Check-in** (according to your selected lock mode to save your collection page layout.

Configure and add flash, video or audio content



Tip

There are three ways to display and execute flash, video or audio content through your Web publication, as follows: (1) If you have a dedicated server site to host the content, users can access content through a link in the publication, set up as described below. (2) Your Web developer could create a special template capable of executing flash, video or audio files; or (3) you can embed Javascript to execute the content within the **Text** field of the **Content** page, as in the example below.

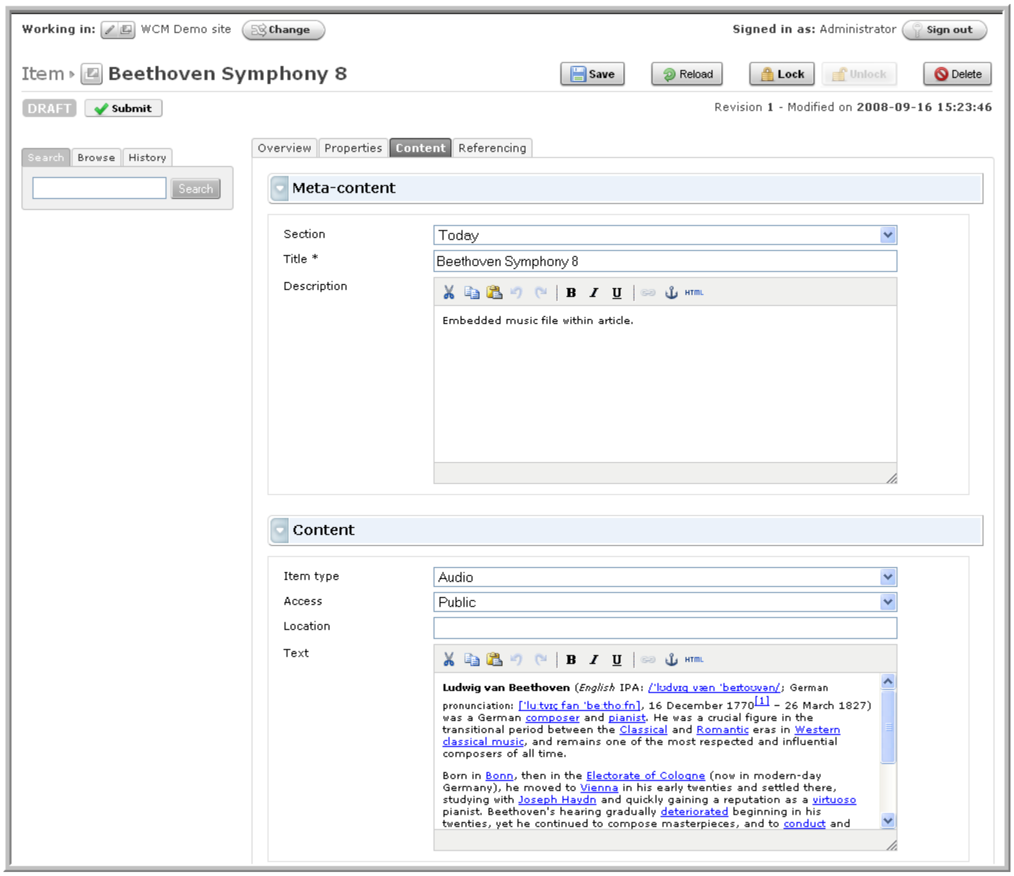
WCM users can enhance the appearance and entertainment value of an online publication by adding multimedia content such as flash animations, videos and audio clips.

To configure the above types of content for your Web publication, proceed as follows:

1. Log in to WCM and choose a site..

2. From the WCM menu bar, choose **Create>Item** to open the **Item** window. Click the **Content** tab to open the **Content** page as shown below.

   Configuration for an audio file



3. Beside **Section**, choose the section in which your flash, video or audio content will appear.

4. Beside **Title**, choose a descriptive title for the flash, video or audio content.

5. Beside **Description**, enter details on the multimedia item.

Note

The text in this field is usually visible only to WCM users, although this will depend on your Web developer's template instructions.

6. Beside **Item type**, choose a multimedia file with reference to the table below.

Table 5.1. 'Item type' options

OPTION	DESCRIPTION	FILE EXTENSIONS
Audio	• Sound files that can be linked to sections, articles, photos and so on.	MP2, MP3, MPGA, RA, RAM, WAV
Flash	• Files with interactive vector graphics and animation, such as a banner title that scrolls across the page, automatically or when clicked.	SWF
Video	• An audio-visual presentation, often used in advertisements or news stories.	AVI, MOV, MPE, MPG, MPEG

Note

For information on the HTML and PDF menu options, see the section called "Configure and add HTML or PDF content"

7. Beside **Access**, choose one of the following:

   - **Public**, to make the published item available to all readers.
   - **Protected**, to make the published item password protected. In this case, a reader would have to register and log in to access this content.
   - **Private**, to select some other behavior (see note below).

Note

The behaviors associated with the **Private**, **Protected** and **Public** options will depend on how your Web developer has coded the templates.

8. Beside **Location**, enter the URL of the audio, video or flash file on a Web server, if applicable.

Note

If you are configuring an item through a link, you must first place the flash, video or audio content on a server capable of executing the file. The template must be set up to interpret the **Location** field as a link.

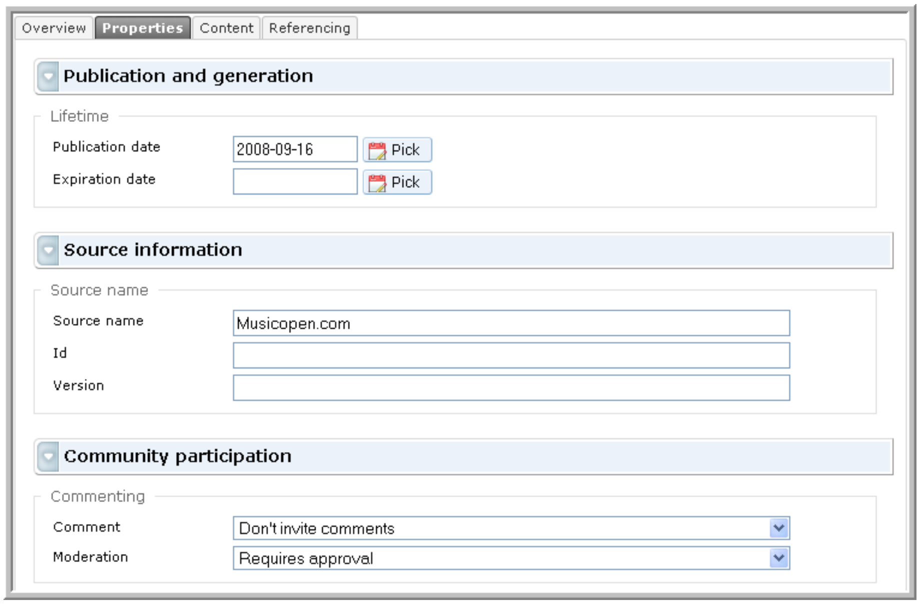
9. Beside **Text**, enter a caption or other text to accompany the published multimedia item.

Tip

To create embedded flash, video or audio content, click **HTML** above the **Text** box and enter Javascript code to link to the Web user's media player and execute the file.

10. Click the **Properties** tab to open the **Properties** page as shown below.

    Properties page for an item



11. Beside **Publication date**, click the calendar icon and select a date to schedule when the item will appear online. Beside **Expiration date**, perform the same action to schedule when the item will cease to appear online.

    ## Note

    Expiration dates are not always taken into consideration in the templates used to generate Web content. Typically templates are set up to loop in recent content (for example, where Publication date = last 7 days); once the publication date no longer meets that criteria, it is replaced by other content in the section pages for the publication. (However, as long as the content remains on the server, it can still be accessed through a search engine.)

12. Beside **Source name**, enter the source of the file.

13. Beside **Id**, enter the ID. If there is no assigned ID, leave this field blank or enter `Unknown`.

14. Beside **Version**, enter the version number for the source, if applicable.

15. Beside **Comment**, select one of the following:

    - **Don't invite comments**, if you don't wish to receive comments from readers.

    - **Invite comments** to invite readers to comment on the item.

      ## Note

      The **Locked** option is relevant only after publication, to discontinue an invitation so that readers can no longer submit comments.

16. If you selected **Invite comments** in the previous step, choose one of the following beside **Moderation**:

    - **Requires approval**, if readers' comments must be approved before being published;

    - **Automatically publish**, to have readers' comments published immediately upon submission.

17. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your multimedia item.

Configure and add HTML or PDF content

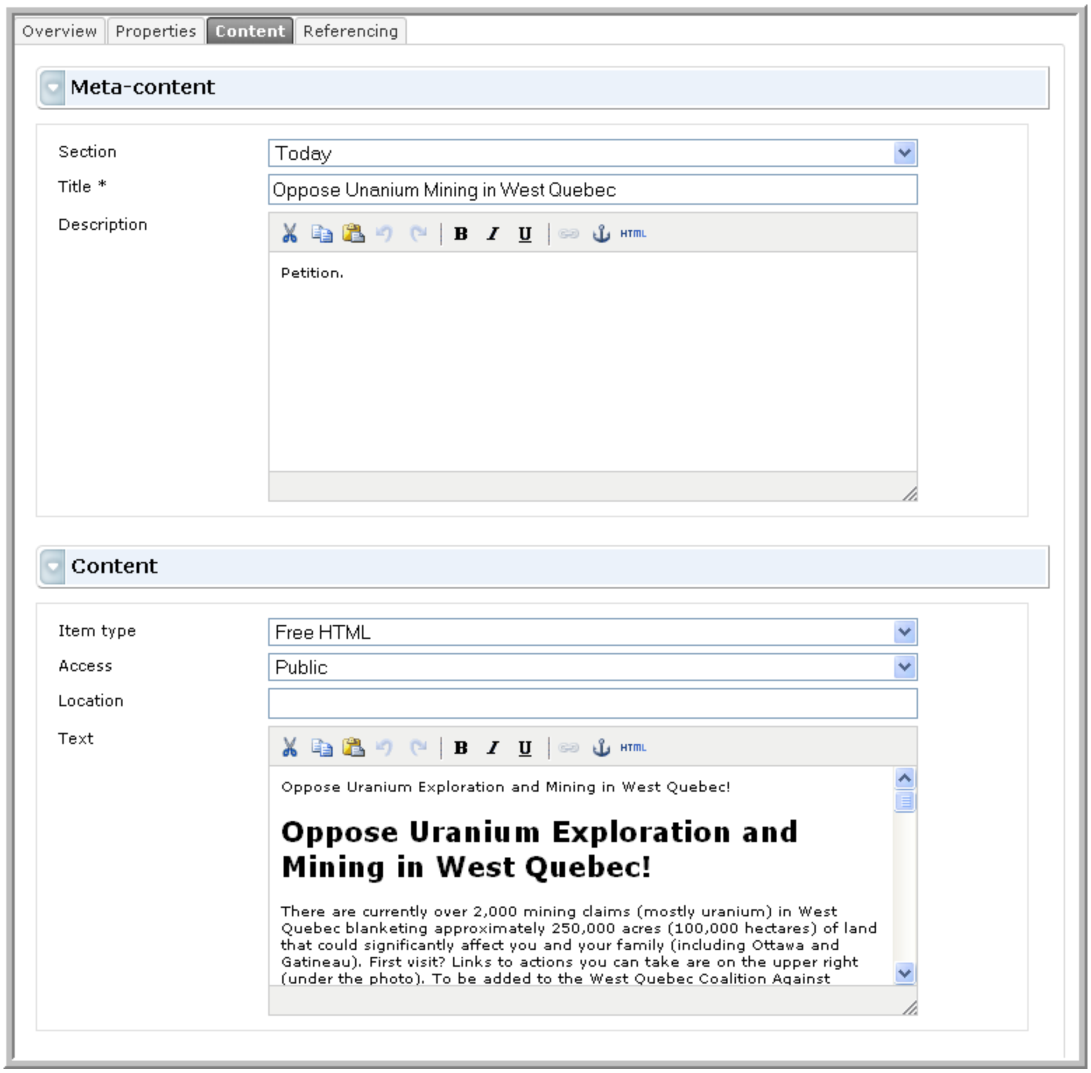
Hypertext markup language (HTML) and portable document format (PDF) can be used to create corporate pages, special event announcements and so on. This content can then be published to the Web through the WCM templates.

To configure HTML or PDF content for your Web publication, proceed as follows:

1. Log in to WCM and choose a publication for the content you are about to create.

2. From the WCM menu bar, choose **Create>Item** to open the **Item <New>** window. Click the **Content** tab to open the **Content** page as shown below.

Configuration for an HTML file



3. Beside **Section**, choose the section in which your PDF or HTML content will appear.

4. Beside **Title**, choose a descriptive title for the PDF or HTML item.

5. Beside **Description**, enter details on the file you are creating.

Note

This field is usually visible only to WCM users, although this will depend on your Web developer's template instructions.

6. Beside **Item type**, choose either **PDF** or **Free HTML**.
7. Beside **Access**, choose one of the following:
   - **Public**, to make the published item available to all readers.
   - **Protected**, to make the published item password protected. In this case, a reader would have to register and log in to access this content.
   - **Private**, to select some other behavior (see note below).

Note

The behaviors associated with the **Private**, **Protected** and **Public** options will depend on how your Web developer has coded the templates.

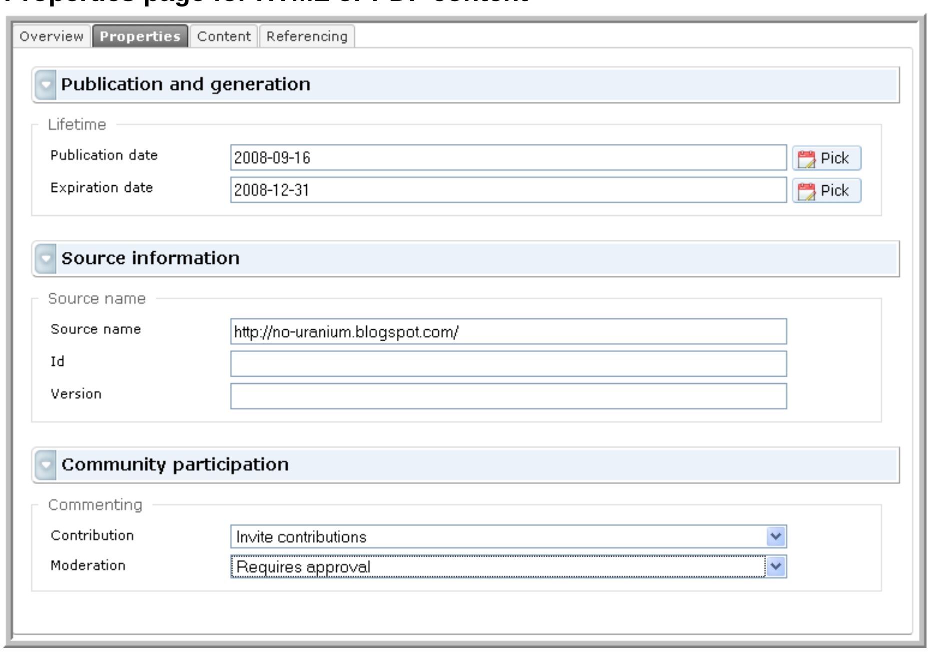
8. To add a link to a PDF file on a Web server, enter the URL for the PDF file beside **Location**.
9. To create an HTML page directly in WCM, beside **Text**, click **HTML** and then enter the HTML code in the HTML editor window that appears.

Tip

Your Web developer must create a template that calls the contents of the **Text** field in order for HTML content entered here to be published correctly.

10. Click the **Properties** tab to open the **Properties** page shown below.

Properties page for HTML or PDF content



11. Beside **Publication date**, click the calendar icon and select a date to schedule when the item will appear online. Beside **Expiration date**, perform the same action to schedule when the item will cease to appear online.

    ### Note

    Expiration dates are not always taken into consideration in the templates used to generate Web content. Typically templates are set up to loop in recent content (for example, where Publication date = last 7 days); once the publication date no longer meets that criteria, it is replaced by other content in the section pages for the publication. (However, as long as the content remains on the server, it can still be accessed through a search engine.)

12. Under **Source Information**, fill in the source name, ID and version. These fields are for your own information only and there are no restrictions on the format or content of the fields.

13. Beside **Contribution**, select one of the following:

    - **Don't invite contributions**, if you don't wish to receive comments from readers.
    - **Invite contributions** to invite readers to comment on the item.

    ### Note

    The **Locked** option is relevant only after publication, to discontinue an invitation so that readers can no longer submit comments.

14. If you selected **Invite contributions** in the previous step, choose one of the following beside **Moderation**:

    - **Requires approval**, if readers' comments must be approved before being published;
    - **Automatically publish**, to have readers' comments published immediately upon submission.

15. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your HTML or PDF item.

16. Configure related content links for your item.

Delete an item or collection

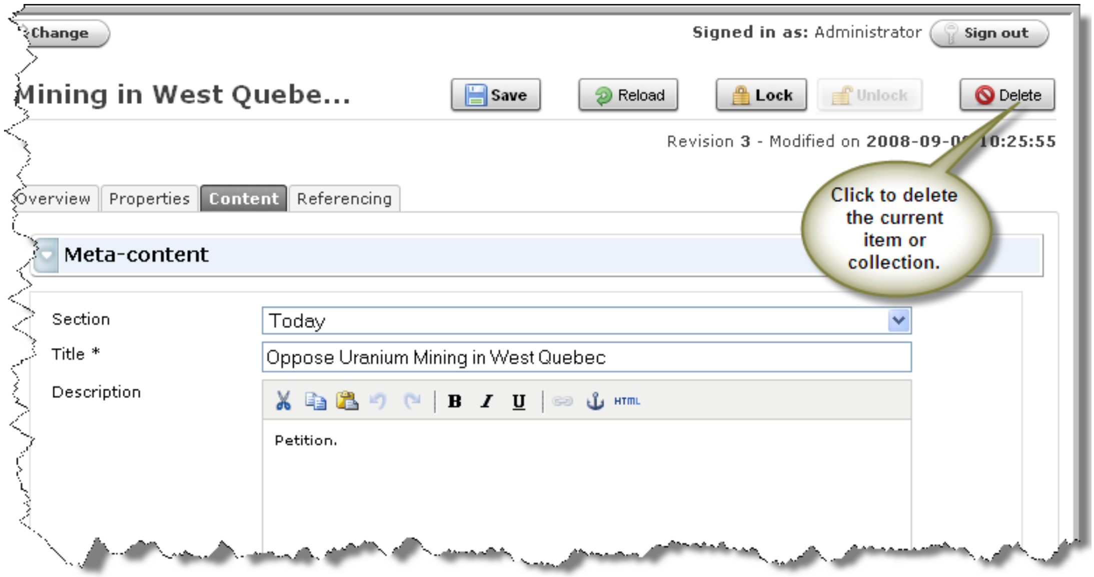
Deleted content objects are removed from the WCM database; however, they continue to be displayed online until the site content is re-generated, and are accessible through search engines thereafter. To delete content objects permanently from the Web server, a network administrator or developer could, for example, create a script to purge outdated content when the site is updated.

To delete an item or collection, proceed as follows:

1. Search for the collection or item, and open it.

2. Click the **Delete** button, as shown below. In the window that appears, click **Yes** to confirm the deletion.

   Deleting an item or collection


Change
Signed in as: Administrator
Sign out
Mining in West Quebe...
Save
Reload
Lock
Unlock
Delete
Revision 3 - Modified on 2008-09-0 10:25:55
Click to delete the current item or collection.
Overview
Properties
Content
Referencing
Meta-content
Section
Today
Title *
Oppose Uranium Mining in West Quebec
Description
Petition.

Chapter 6. Polls and Forums

This chapter provides instructions to help WCM users perform the following tasks:

1. Browse polls or forums.

2. Configure an opinion poll.

3. Configure a forum.

4. Delete a poll or forum.

Note

To add related content links to a forum, see the section called “Configure related content links for a content object”.

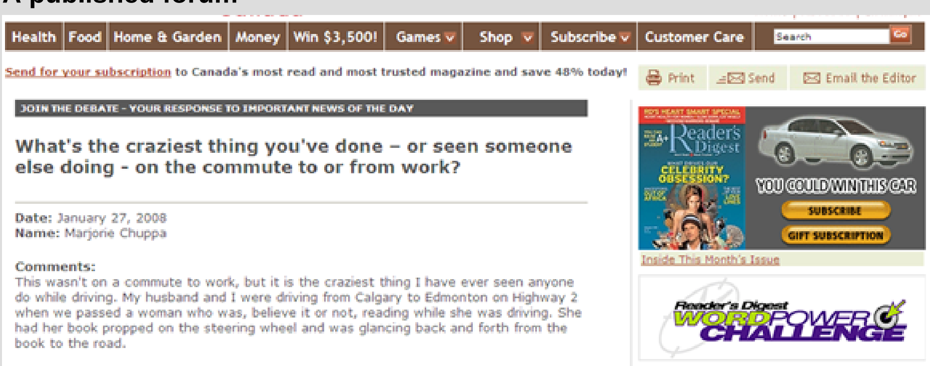
To add IPTC codes and tags to a forum, see the section called “Configure IPTC codes and tags for a content object”.

Browse polls or forums

Polls are used to solicit the opinions of a publication's readers. Opinion polls are often framed as a question relating to an article positioned nearby on the page. Polls are a useful tool to gather data, stimulate interest in section content, and encourage readers to comment.

Forums are Web pages for holding discussions and posting user comments. Forums are also commonly referred to as Web forums, message boards, discussion boards, (electronic) discussion groups, bulletin boards, or Internet forums. Messages within forums are displayed either in chronological order or as threaded discussions.

A published forum

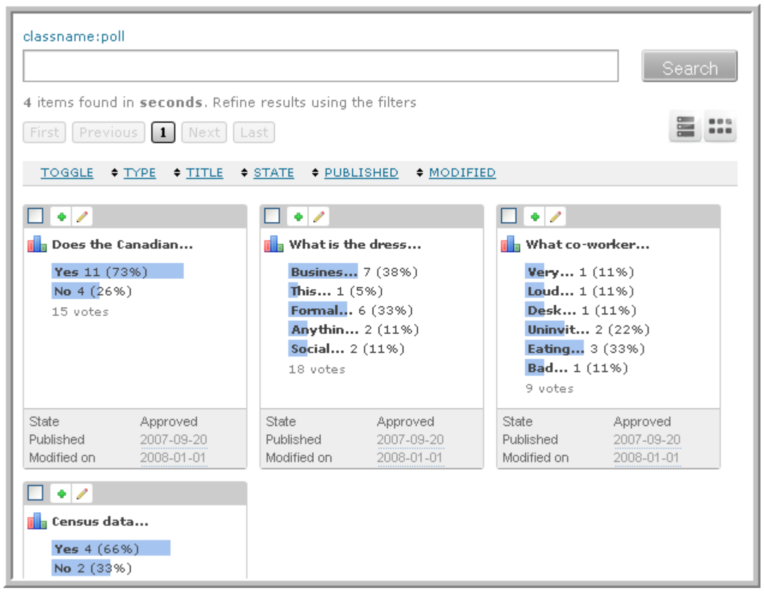


To browse and open polls or forums, proceed as follows:

1. Log in to WCM.

2. From the WCM menu bar, choose **Browse>Polls** or **Browse>Forum threads**, as appropriate. Configured polls or forums will be displayed as shown below.

Browsing polls



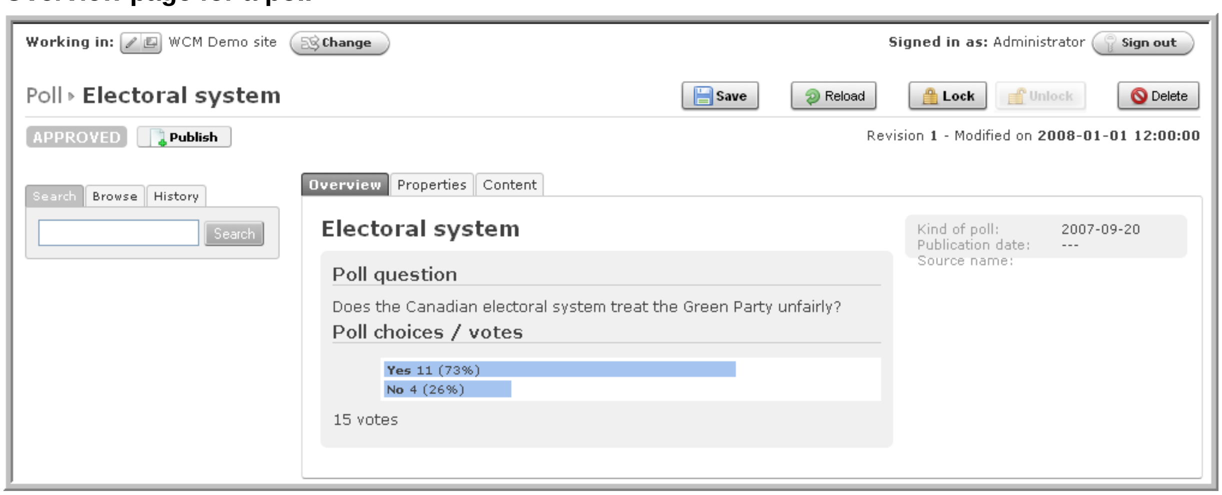
Note

For details on display modes and navigation, see the section called “Search results navigation”

3. To open poll or forum, click the pencil icon.

4. Click the **Overview** tab to display the **Overview** page. This page summarizes all the data for the current content, as shown below.

Overview page for a poll



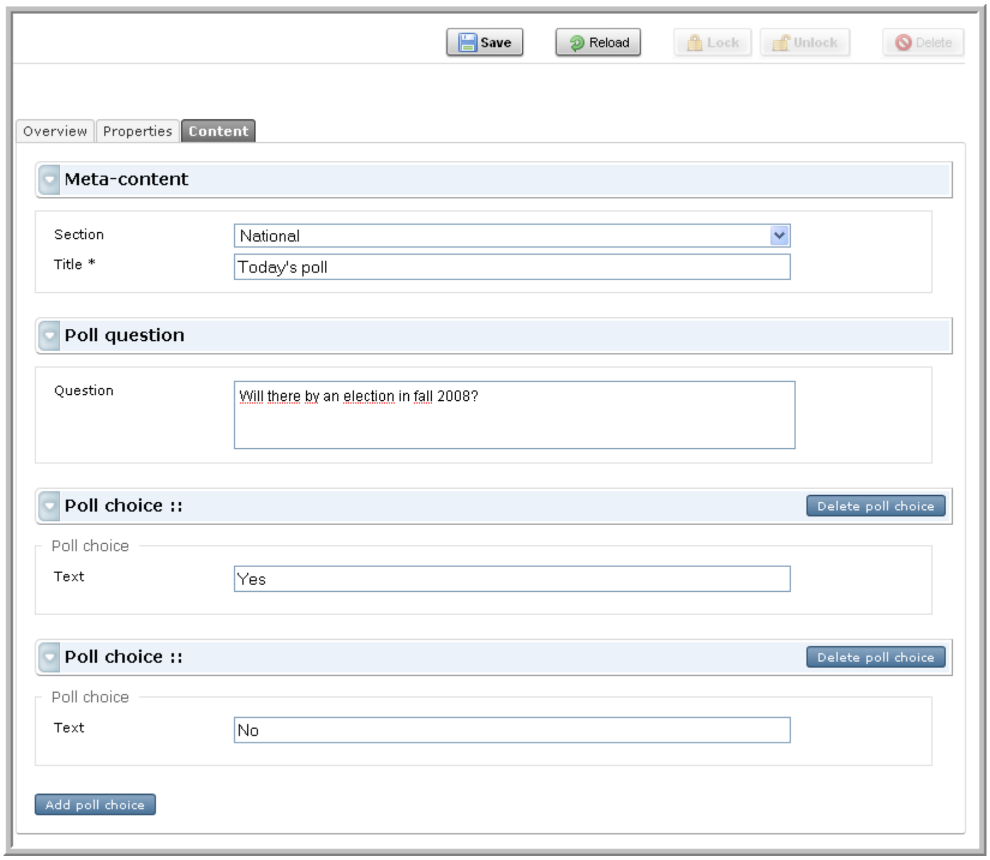
Create an opinion poll

To create an opinion poll, proceed as follows:

1. Log in to WCM and choose a site for the content you are about to create.

2. From the WCM menu bar, choose **Create>Poll**. The **Content** page is active by default, as shown below.

Poll window, Content page



3. Beside **Section**, select the section in which your poll will appear.

4. Beside **Title**, enter a descriptive title for the poll.

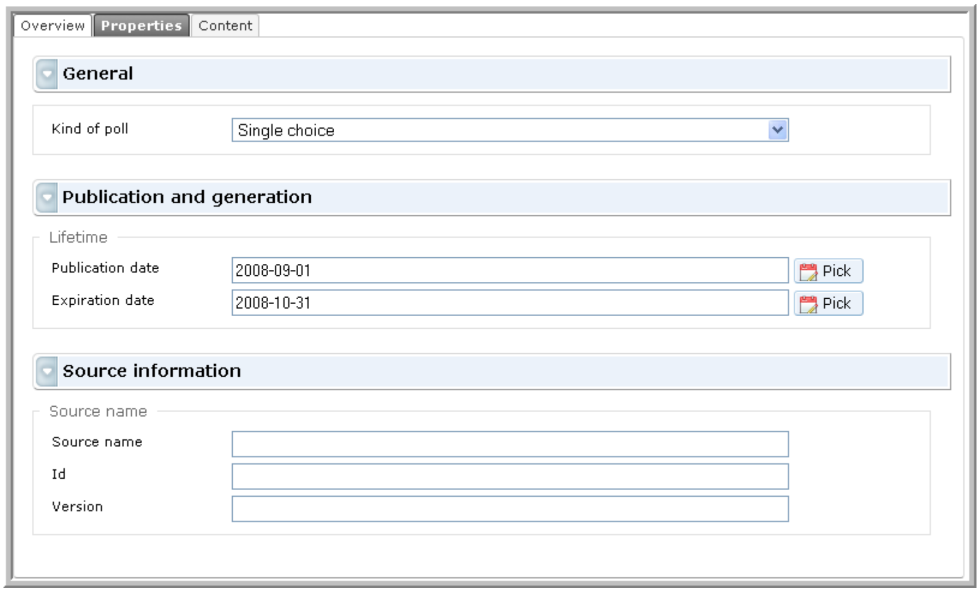
5. Beside **Question** enter a poll question.

6. Under **Poll choice**, enter the first response option for the poll, and click **Add poll choice**.

7. Repeat Step 6 until you have entered all the required response options.

8. Click the **Properties** tab to open the **Properties** page as shown below.

Poll properties



9. Beside **Kind of poll**, select one of the following:

   - **Multiple choice**, to allow readers to select more than one response to the poll. For example, if the poll question were "What is your favorite dessert?" this option would allow readers to select both "ice cream" and "fruit salad".

   - **Single choice**, to make readers' selections mutually exclusive. For example if the poll question were "How many desserts do you eat per day?", this option would allow readers to submit only one item from the response list.

10. Beside **Publication date**, click **Pick** and use the pop-up calendar to select a publication date. Beside **Expiration date**, perform the same action to schedule when the poll will cease to appear online.

    ### Tip

    Editors can use the WCM page layout widgets to choose specific polls for a given date. The polls chosen this way will be active regardless of their publication and expiration dates.

11. Fill in the information for the source of the poll as follows:

    - Beside **Source**, enter the source of the poll.

    - Beside **Id**, enter the source's ID. For example, if your company has assigned IDs to its commonly used sources, you could enter that information here.

    - Beside **Version**, enter the source publication's version number, if applicable.

12. Select **Save** or **Check-in** (according to your selected lock mode) to save your poll.

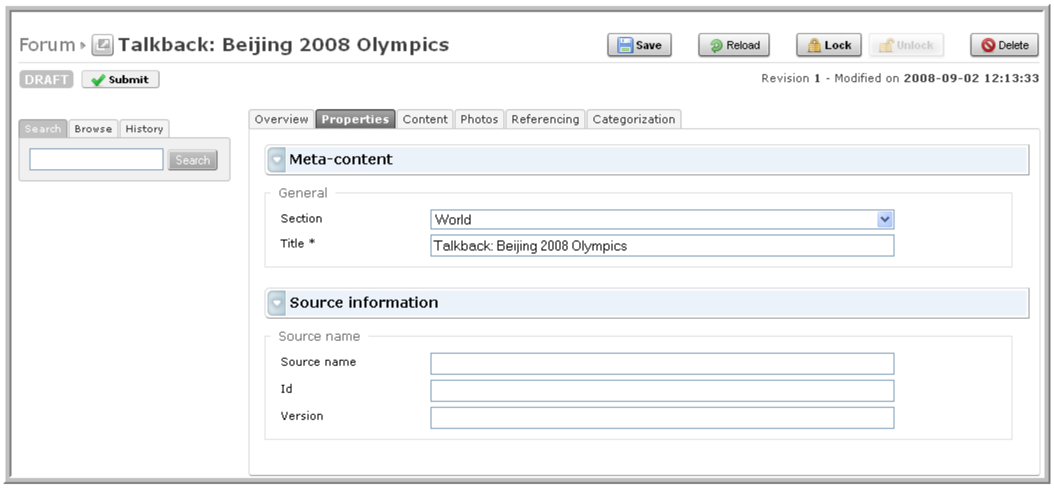
Create a forum

To create a forum, proceed as follows:

1. Log in to WCM and choose a site for the content you are about to create.

2. From the WCM menu bar, choose **Create>Forum thread** to open the **Forum** window as shown below. The **Properties** page is active by default.

Forum window



3. Beside **Section**, choose the section in which your forum will appear.

4. Beside **Title**, enter a descriptive name for the forum.

5. Fill in the information for the source of the forum as follows:

   - Beside **Source**, enter the name of the publication where the forum originally appeared, if applicable.

   - Beside **Id**, enter the source's ID. For example, if your company has assigned IDs to its commonly used sources, you could enter that information here.

   - Beside **Version**, enter the source publication's version number, if applicable.

6. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your forum.

Note

The **Content** page is read the forum comments once it has been published.

Add photos to a forum

Tip

The number of photos that can be used with a forum depend on the template. Before beginning, check with your Web developer to ensure that he/she has provided for photos and to know the number of photos you can upload for your forum.

To include photos relevant to the content that is the focus of your forum, proceed as follows:

1. If you already have a **Forum** window open, skip to Step 2. Otherwise, browse or search for the forum to which you wish to add a photo, and open it.

2. Click the **Photos** tab, and then click the **Upload Media** button.

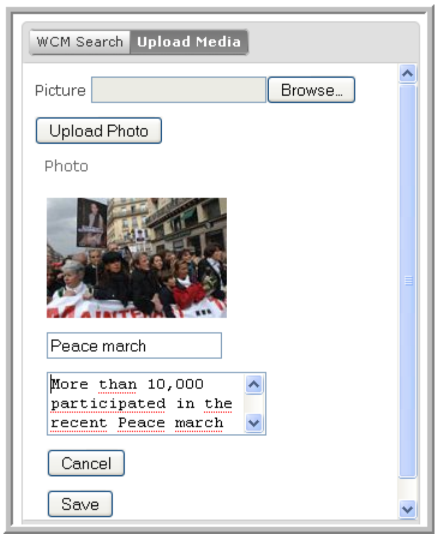
Note

To use photos that are already in WCM, click **WCM Search** and use the search function to retrieve a photo.

3. Beside **Picture**, click **Browse**. In the window that appears, locate the photo you wish to add and click **Open**. The photo path will appear beside **Picture**.

4. Click **Upload Photo**.

Adding a photo to a forum



5. In the spaces under the photo, add a title and a caption.

6. Click **Save** to add the photo to the forum. The photo will be moved to the left pane.

7. Repeat Steps 2 to 6 to add additional photos if desired.

8. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your forum configuration.

Delete a poll or forum

Deleted content objects are removed from the WCM database; however, they continue to be displayed online until the site content is re-generated, and are accessible through search engines thereafter. To delete content objects permanently from the Web server, a network administrator or developer could, for example, create a script to purge outdated content when the site is updated.

To delete an opinion poll or forum, proceed as follows:

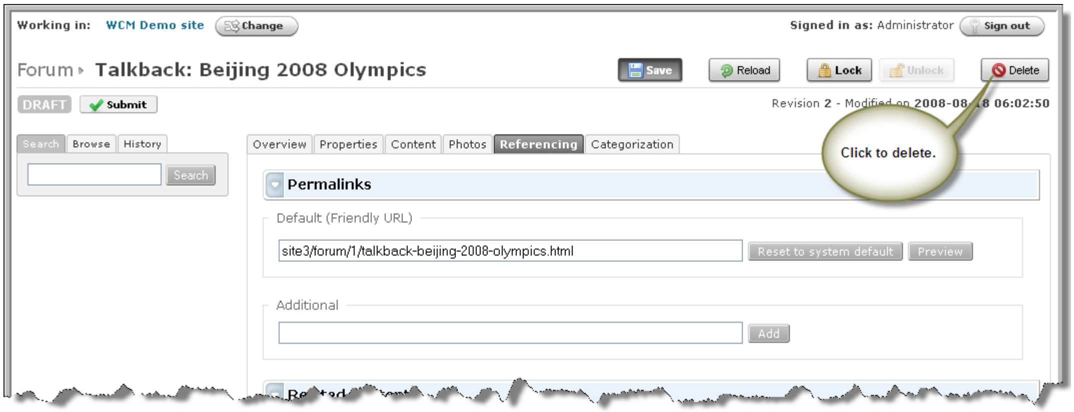
1. Browse or perform a search to locate the poll or forum, and open it.

2. Check-in the poll or forum if necessary.

3. Click the **Delete** button as shown below.

4. In the confirmation window, click **Yes** to confirm. The poll or forum is immediately deleted from the database.

Deleting a forum



Chapter 7. Tasks Common to Multiple Content Types

This chapter provides WCM users with instructions to perform the following tasks:

1. Configure related content links for a content object.
2. Configure IPTC codes and concept tags for a content object.
3. Configure Nfinder metadata tags for a content object.
4. Advance a content object to the next state in a workflow.

Configure related content links for a content object

> *Related content* is presented as a list of hyperlinks near displayed content such as an article. The presence of hyperlinked related content encourages readers to read on, and enhances their online reading experience.

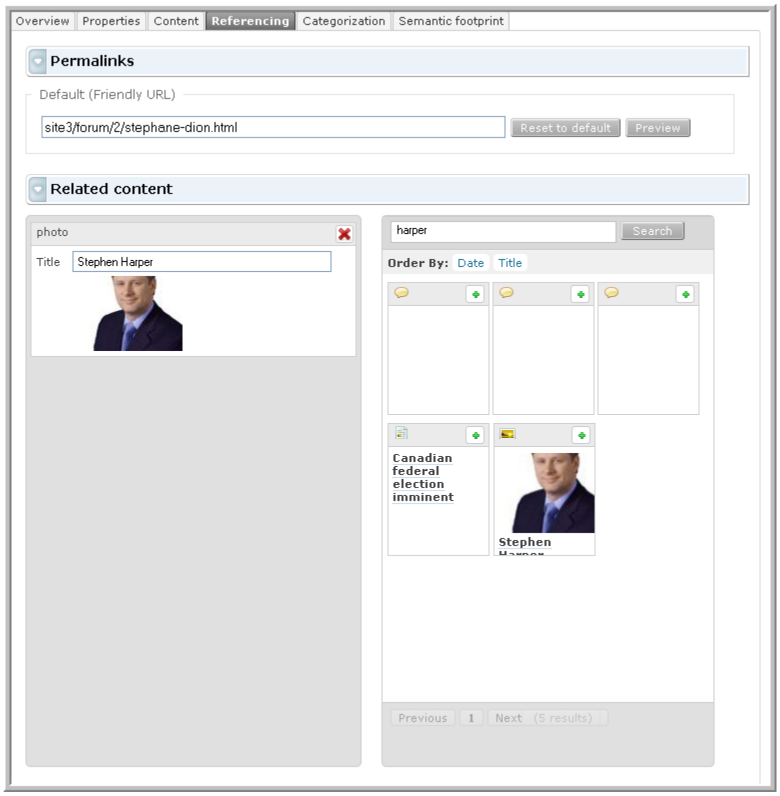
Note

This procedure applies to photos, slideshows, articles, news items, "items", and forums. Related content links cannot be configured for collections (which are themselves sets of related content links), or for polls.

To configure related content links for a content object, proceed as follows:

1. Browse or search to locate the content object and open it.
2. If necessary, click **Check-out** to open the content object for editing.
3. Click the **Referencing** tab to open the **Referencing** page shown below.

   Referencing page for a photo or slideshow



Note

For information on the use of the **Preview** button, see the section called “Preview a section page”

4. The **Default (Friendly URL)** field will be auto-filled in with the information from the **Naming rule** field in the **Generation Content** window for the applicable content type.

    - To create a custom URL, enter an alternative path in this field.
    - If desired, change the safename portion of the URL. (The "safename" is the title of the photo or slideshow, with the spaces replaced by some other character to conform with the rules for URL addresses.) For example, you could modify the name `A-kaleidoscope-of-photos-from-today-s-top-stories` to the more concise `photos-from-todays-top-stories`.
    - To revert to the original information displayed, after making changes, click **Reset to system default**.

Tip

The keywords used in a URL are considered one of the top four factors used by Google to rank pages, so put some thought into the wording of your default URL. (The other three factors are domain name, title (headline) and sub-head.)

5. In the **Search** field, enter a keyword related to your content object. For example, if you are configuring related content for a photo is of tennis star Serena Williams, you might enter "tennis" or "sports" as your search word.

Note

For search tips, see Chapter 2, *Searches and Queries*.

6. Click **Search**. The content meeting your search criteria will be displayed.

Tip

To sort your results by date, (useful for a "today's top stories" type slideshow) click **Date** beside **Order by**. To sort by title, click **Title**.

7. To add a content object as a related content link, select it from your search results list and drag it to the left pane (or click the green plus sign). Repeat to add additional content if desired.

8. Repeat Steps 5 to 7 to add additional related content if desired.

9. To save your related content selections for the current content object, select **Save** or **Check-in** (according to your selected lock mode).

Configure IPTC codes and tags for a content object

IPTC codes are a controlled library of categories that can be generated and applied to any WCM content object as tags, that will subsequently be used by search engines to locate the object.

Internet sites such as `http://www.iptc.org/NewsCodes` provide lists of IPTC codes.

Tags are concept keywords or phrases associated with a single content object. For example, a Web article might include the tags *Baseball, Red Sox, Tickets, Away Games, and Discounts*, each leading to an index listing Web pages using that tag. This allows Web users to quickly locate all Web pages which have been associated with the term *Red Sox*, for example.

Tags can be used for search engine optimization (SEO), and/or to populate Tag clouds (see example below), or lists of links in a Web publication.

Tag cloud

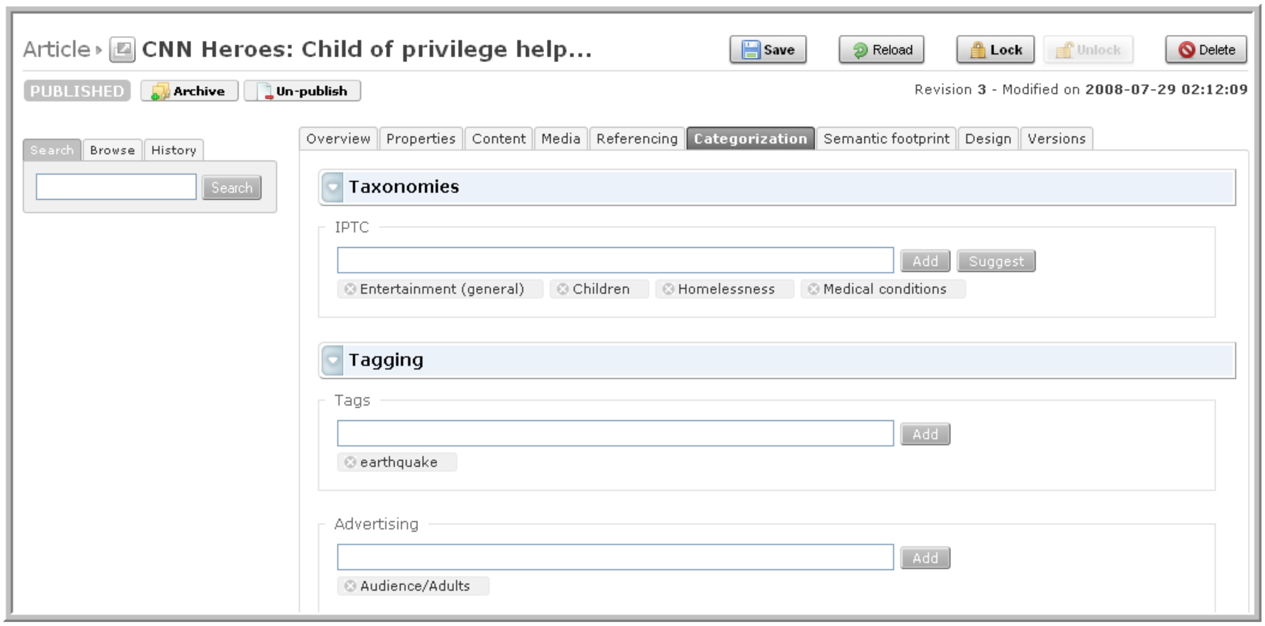
Note

This procedure applies to photos, slideshows, articles, news items, collections, and forums. It does not apply to "items" or polls.

To configure IPTC codes and tags for a content object, proceed as follows:

1. Browse or search for the content object and open it.
2. If necessary, click **Check-out** to open the content object for editing.
3. Click the **Categorization** tab to open the **Categorization** page shown below.

   Categorization page for an article

4. Under **IPTC**, enter an IPTC descriptive news code (for example, *justice and rights*) and click **Add**.

   ## Tip

   To get a list of suggestions for IPTC codes, enter a forward slash (**/**) and the first letter or letters of a keyword. For example, to browse IPTC codes for justice, you would enter `/ju`. Alternatively, click the **Suggest** button.

   Click an IPTC code on the list to select it.

   Repeat to add additional IPTC codes if desired.

5. Under **Tags**, enter a tag. To get a list of suggestions, enter a forward slash (**/**) and the first few letters of a tag and select a keyword or phrase for the collection. Click **Add** to add the tag.

   ## Tip

   Google has developed an online tool to find the keywords most searched by Googlers: `https://adwords.google.com/select/KeywordToolExternal`.

Repeat to add additional tags if desired.

6. Under **Advertising**, enter a forward slash (**/**) and select a keyword or phrase from the list displayed. The phrase you select will be used by your company's ad server to associate appropriate advertisements for the selected target market.

   ### Note

   The list displayed is defined in XML files by the software administrator or Web developer.

7. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your tags.

Configure metadata tags for a content object

> *Metadata* is used to facilitate the understanding, use and management of data. In a library for example, metadata for a book would typically include a description of the content, the author, the publication date and the physical location.
>
> A *tag* is a descriptor used to facilitate searches. Tags are keywords or phrases associated with a single content object such as an article. For example, a Web article might display the tags *Baseball, Red Sox, Tickets, Away Games*, and *Discounts*, with each link leading to an index listing web pages which use that tag. This allows a reader to quickly locate all pages which have been associated with the term *Red Sox*, for example. If the server supports tag searching, a reader would be able to find all pages that use a particular set of tags.
>
> *Descriptive metadata* (that is, tags), provides information on individual content samples, whereas *structural metadata* (that is, the metadata generated by Nstein TME) is the result of analysis of multiple content samples and evaluation of data relationships. This process makes it possible to perform complex filter and search operations, and to generate categorical lists.

Note

The **Semantic footprint** page used in this procedure is used to supplement the TME-generated metadata with additional user-entered data. This procedure applies to articles, news items, collections, photos and slideshows.

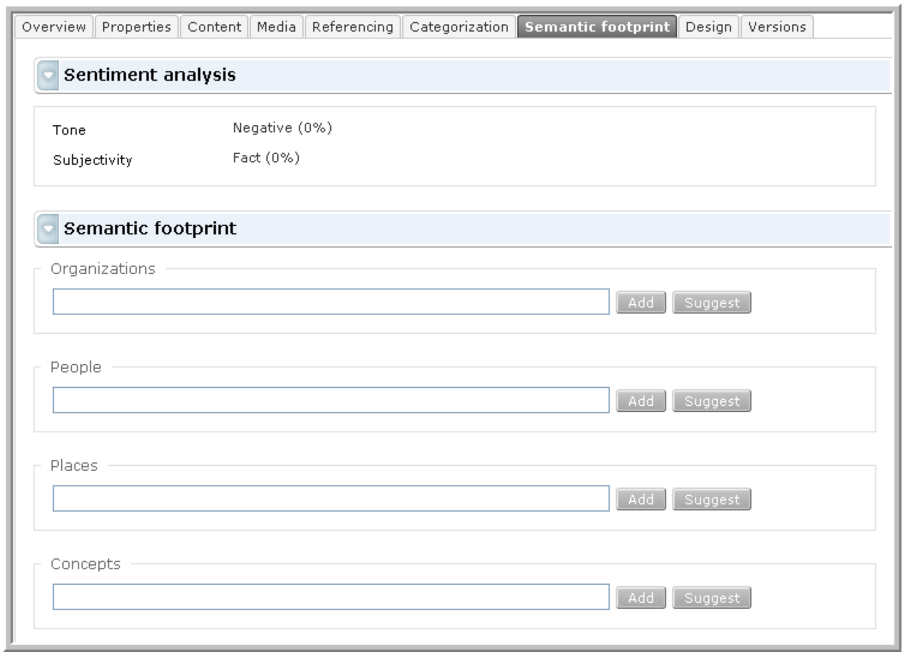
Tip

Manually-added metadata tags are especially useful for photos or slideshows, which, being representative rather than text entities, don't typically include a lot of words for the TME to mine.

To configure people names (PN), geographic locations (GL), organization names (ON) and concept tags for an article, news item, collection, photo or slideshow, proceed as follows:

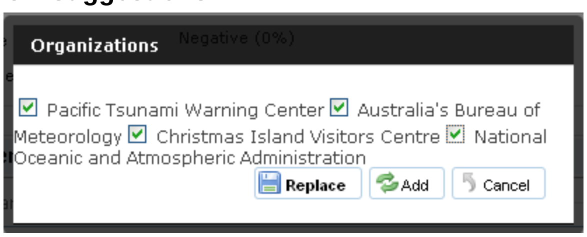
1. Browse or search for the content object.
2. If necessary, click **Check-out** to open the content object for editing.
3. Click the **Semantic footprint** tab to open the **Semantic footprint** page as shown below.

   Semantic footprint page



4. Under **Organizations**, click the **Suggest** button to bring up a list of TME-generated suggestions based on the content of the content object.

ON suggestions



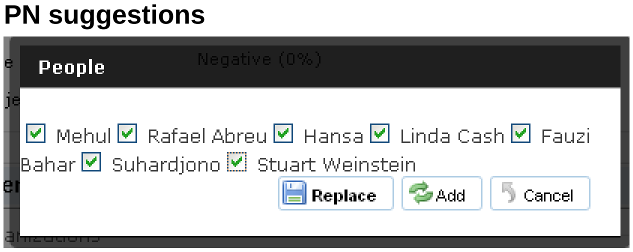
- In the **Organization** window, select the organization names you wish to add as tags, and click **Add**.
- Enter additional tags if desired, clicking **Add** after each addition.

Tip

Clicking the **Replace** button will delete tags already associated with the content object and replace them with the selected tags.

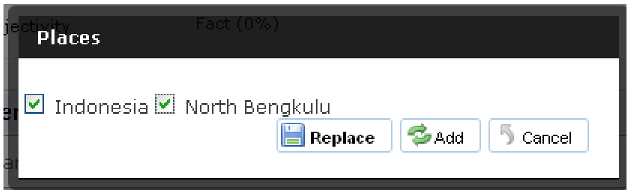
5. Under **People**, click **Suggest**. Select the people names you wish to add as tags, and click **Add**. Manually enter additional person names if desired.

PN suggestions



6. Under **Places**, click **Suggest**. Select the geographic locations you wish to add as tags, and click **Add**. Manually enter additional geographic locations if desired.

Suggested geographic locations for a photo



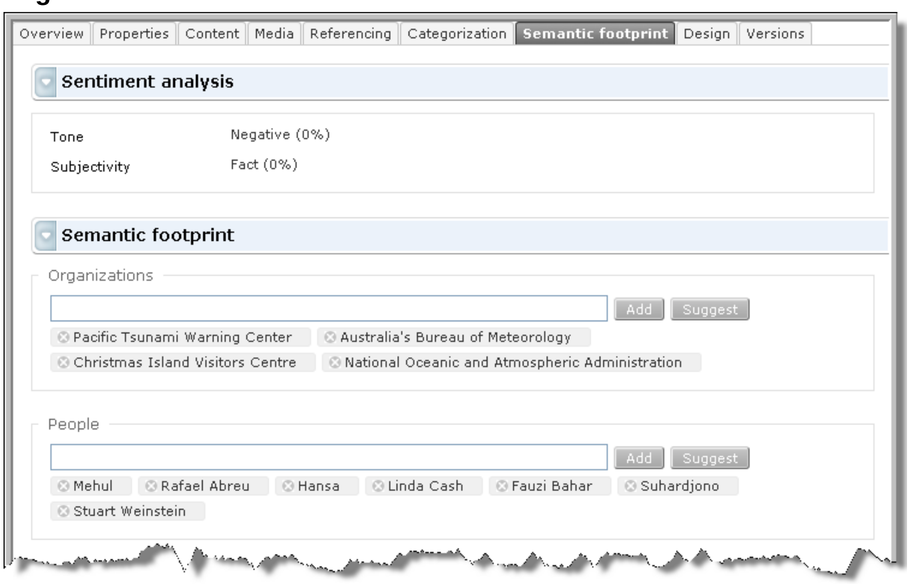
7. Under **Concepts**, click **Suggest**. Select the concepts you wish to add as tags, and click **Add**. Manually enter additional concepts if desired.

Note

If you already entered concepts in the **Tags** field of the **Categorization** page, you can skip this step.

The screenshot below shows a completed **Semantic footprint** page for an article.

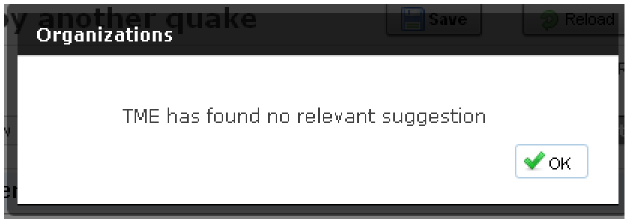
Tags for an article



Note

If a content object does not contain relevant metadata, you will see a message as shown below. If required, you can still manually enter applicable tags through the **Semantic footprint** window, clicking **Add** after each addition.

ON suggestions



8. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your tags.

Advance a content object to the next state in a workflow

> *Workflows* are WCM system objects that describe the "life cycle" of a content object in terms of state transitions. State transitions describe the conditions required for a content object to pass from one state to another within a workflow.

Note

For more information on workflows, see Part V, Chapter 1, *Workflows*

Once WCM users have completed their tasks in a workflow, they can advance the object to the next workflow state. For example, once an editor has completely created an article, he/she would advance it from "Draft" to "Submitted" status, after which a managing editor would read and approve the article.

The default WCM workflow states for content objects are **Draft, Submitted, Approved, Published, Archived**. However, if you have customized workflows (as described in Part V, Chapter 1, *Workflows*), other states and state transitions could be used.

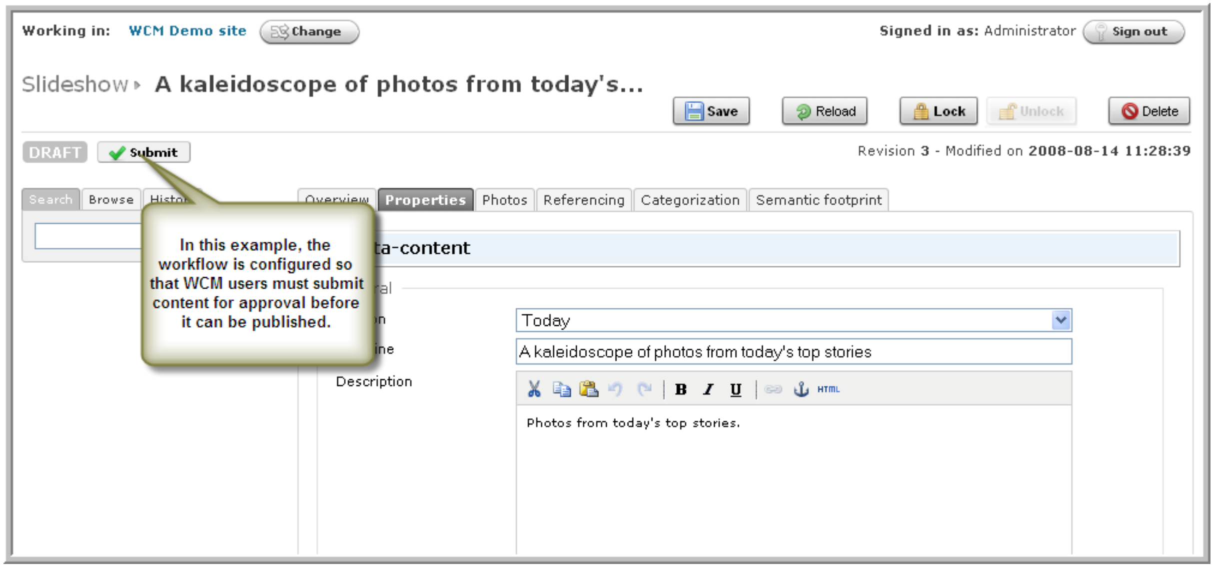
To advance an object to the next state, proceed as follows:

1. Locate the content object and open it.

2. Ensure that all operations required to prepare the content object for the next state have been completed. For example, if the content object is a photo, and you are an editor, this would entail verifying that the photo had been completely created and checked in.

3. Click the appropriate workflow button located in the top left of the content object's window. In the example below, the **Submit** button is clicked to advance a slideshow from "Draft" to "Submitted" state.

   Submitting a slideshow


Working in: WCM Demo site
Change
Signed in as: Administrator
Sign out
Slideshow ▸ A kaleidoscope of photos from today's...
Save
Reload
Lock
Unlock
Delete
DRAFT
Submit
Revision 3 - Modified on 2008-08-14 11:28:39
Search
Browse
Properties
Photos
Referencing
Categorization
Semantic footprint
In this example, the workflow is configured so that WCM users must submit content for approval before it can be published.
Today
A kaleidoscope of photos from today's top stories
Description
Photos from today's top stories.

Chapter 8. Web Users and UGC

> *Web users* are the readers of an online publication.
>
> User-Generated Content (*UGC*) comprises content that relies on the input of a publication's readers, Forums and polls are two ways of stimulating UGC, as are invitations for comments appended to content objects such as articles.

WCM users can display comments for a particular published content object, review and evaluate comments from readers, manage readers' ability to leave comments, and create reader IDs.

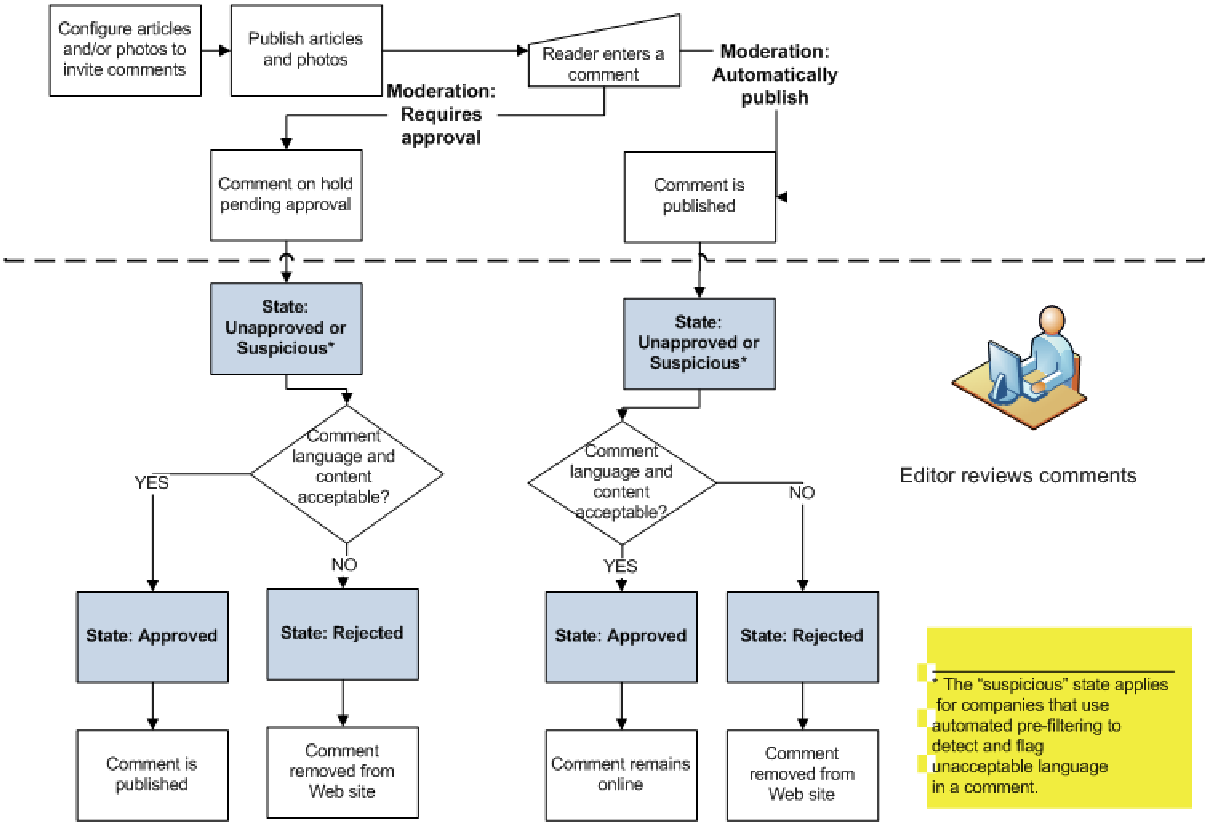
This chapter provides instructions to help WCM users perform the following UGC-related tasks:

1. Understand reader comment workflows within WCM.
2. Browse all reader comments.
3. Modify the state of a comment.
4. Approve or reject comments through the dashboard.
5. Search comments by state.
6. Delete a comment.
7. Discontinue an invitation for comments for a published content object.
8. Create a Web user ID and subscribe a new user to a newsletter.
9. Manage newsletters as follows:
   - Understand the steps required to publish a newsletter.
   - Configure a newsletter and its content.
   - Specify newsletter templates.
   - Modify subscription information or cancel a subscription to a newsletter.

Comment workflows

WCM users can configure various content objects to invite reader comments. To invite reader comments, one must select **Contributions: Invite contributions** when configuring an article or other content object. The flowchart below shows how the configuration settings and WCM users' actions control the processing of reader comments.

State transitions for reader comments



Note

The state transitions used in the example above are only one possible workflow for comments. Your WCM implementation can be customized to use a different workflow for handling reader comments. For details on configuring workflows, see Part V, Chapter 1, *Workflows*.

Browse all reader comments

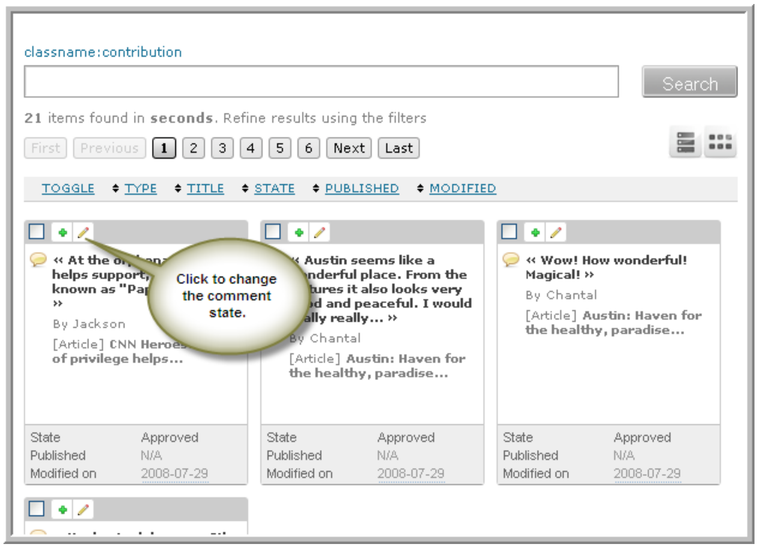
Tip

To browse only those reader comments that require approval, use the dashboard. For more information, see the section called "Approve/reject reader comments through the dashboard".

To browse reader comments, proceed as follows:

1. Log in to WCM.
2. From the WCM menu bar, select **Moderate>User comments** to display comments submitted by readers of the Web publication.

   Browsing commented content



Tip

WCM users can write editorial responses to readers' comments through their publication's Web site, in the same way that readers enter their comments.

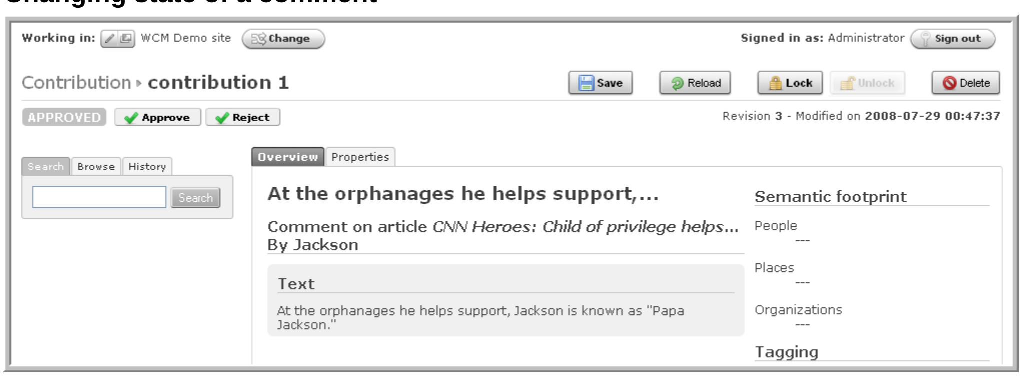
Modify state of a comment

To modify the state of a comment, proceed as follows:

1. Browse to locate the specific comment you want to modify. Click the pencil icon to edit the state of the comment.

2. To revise the state of the comment, click the **Approve** or **Reject** button, as shown below. See "How reader comments are processed" for details on these states.

Changing state of a comment



3. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

Approve/reject reader comments through the dashboard

The out-of-the-box version of WCM 4.0 includes a dashboard module for approving comments.

To display comments awaiting moderation, and approve or reject them, proceed as follows:

1. Log in to WCM, or from within WCM, click **Home**. The WCM dashboard will be displayed. Scroll down to display the **Requiring Attention** modules, as shown below.

   Comments on the WCM dashboard

2. Read the text of the various comments listed under **Awaiting moderation**.

   - If the language and content of a comment appears acceptable, click **Accept**. The comment state is changed to **Accepted** and it will appear online the next time the publication content is updated.

   - If the language or content of a comment is abusive or offensive, click **Reject**. The comment state is changed to **Rejected**, but the comment remains in the WCM database.

Search comments by state

Note

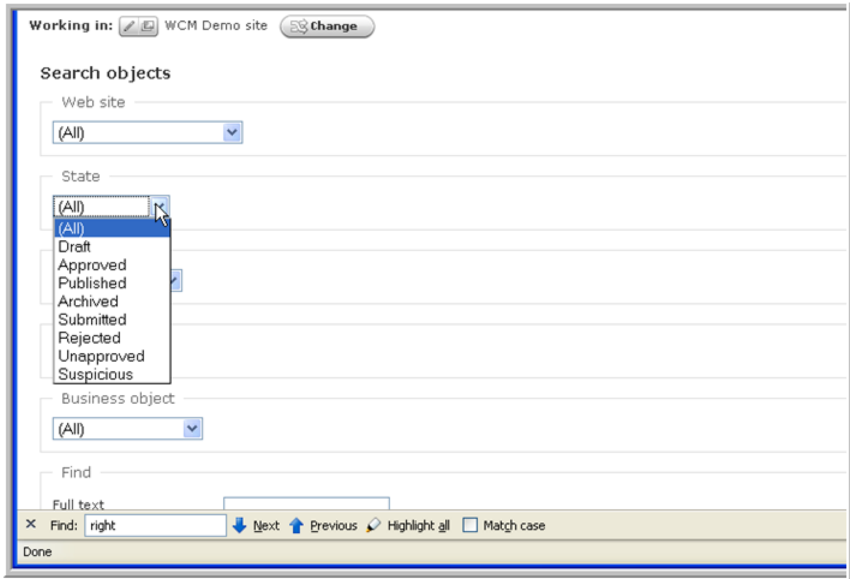
This procedure describes the out-of-the-box workflow states for comments. If you have created a custom workflow, the states will be different. For more information on workflows, see Part V, Chapter 1, *Workflows*.

To search reader comments according to their workflow state, proceed as follows:

1. Log in to WCM.

2. At the top right of the WCM menu bar, click the **Advanced searches>Editorial** button to open the **Search objects** window shown below.

   Search comments by state



3. Under **Business object**, select **Comment**.

4. Under **State**, select one of the following comment workflow states:

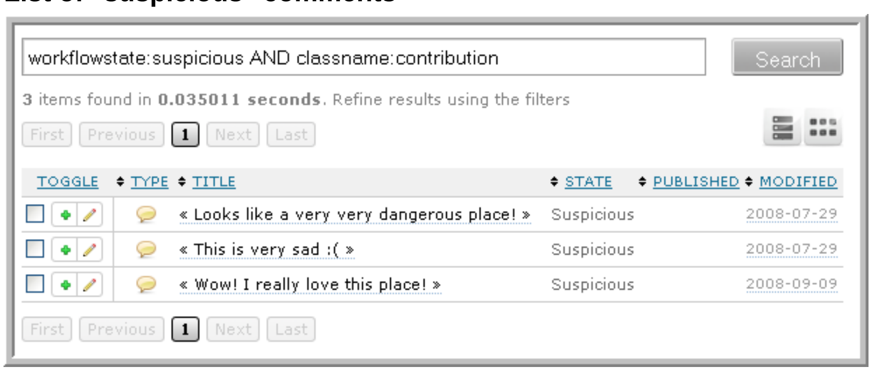
   - **Suspicious**, for comments that have been submitted but have not yet been approved or rejected.
   - **Approved**, for comments that have been approved by an editor through WCM.
   - **Rejected**, for comments that have been rejected by an editor through WCM.

Note

Unapproved is only the initial for comments, so selecting this option will not return any results.

5. Click **Search**. The comments meeting the search criteria will be displayed, as shown in the example below.

List of "suspicious" comments



Note

To modify the state of a comment, see the section called “Modify state of a comment”

Delete a comment

To delete a Web user's comment, proceed as follows:

1. Browse or search to locate the specific comment you want to delete. In the search results list, click the pencil icon to display the comment.

Deleting a comment

2. To delete the comment, click the **Delete** button. In the confirmation window, click **Yes** to remove the comment from the WCM database.

Discontinue an invitation for comments

Articles, news items, photos, slideshows, collections, and items can be configured to "Invite comments". However, at some point after the aforementioned content objects are published, a magazine editor may wish to stop receiving comments, while continuing to display the content object and its existing comments.

To discontinue an invitation for comments on a published content object, proceed as follows:

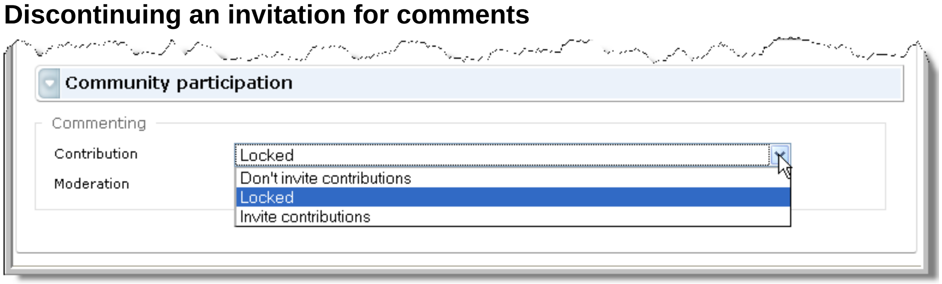
1. Browse or search to locate the published content object, and open it.

2. If necessary, click **Check-out** to open the content object for editing.

3. Click the **Properties** tab to open the **Properties** page for the content object.

4. Scroll down to the **Community participation** portion of the page. Beside **Contribution**, select **Locked** as shown below.

Discontinuing an invitation for comments



5. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

Create a Web user

Note

If your Web site includes a form by which readers can register themselves, this procedure may not be necessary.

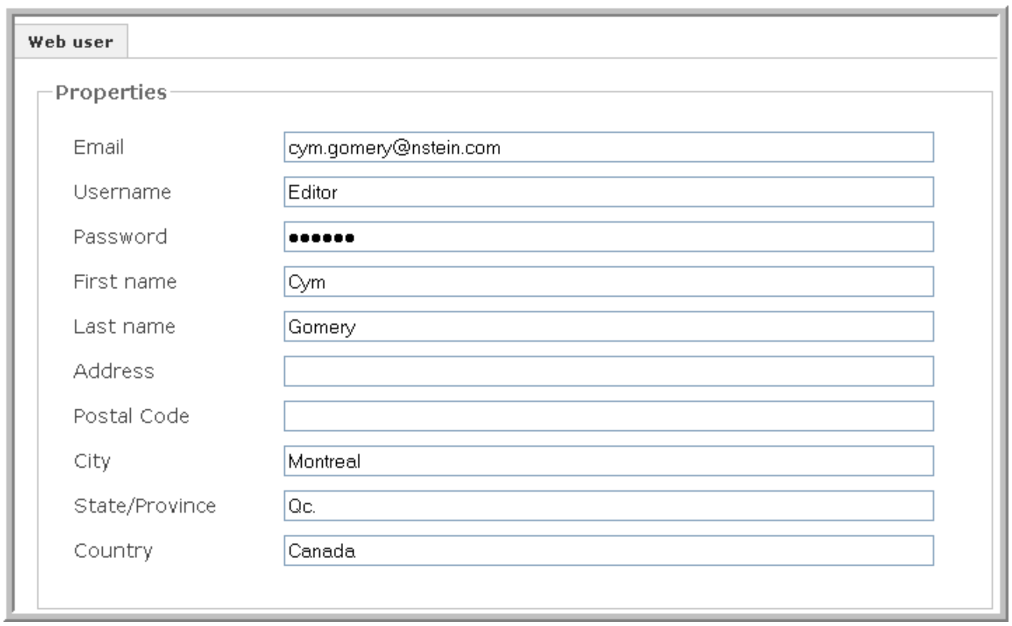
Web users are WCM content objects that represent readers of an Web publication. Web user objects allow WCM users to identify readers who submit comments. In some publication setups, Web users are required to pay a fee to view certain content or to submit comments.

WCM users should create a Web user object for every reader that contributes to the Web publication.

To create a Web user, proceed as follows:

1. From the WCM menu bar, choose **Manage>Web users**. The **Web user** window will be displayed, as shown below.

   Web user window

2. Beside **Email**, enter the email address for the reader.

3. Beside **Username** enter the name (no spaces) that will be used to identify the user.

4. Beside **First name**, enter the reader's first name.

5. Beside **Last name**, enter the reader's last name.

6. Enter the reader's **Address**, **Postal Code, City, State/Province** and **Country** in the spaces provided.

7. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your reader ID.

8. To configure a newsletter subscription for the Web user, proceed as described below.

Subscribe a Web user to a newsletter

Note

This procedure will not be required for companies whose Web site templates allow Web users to subscribe themselves to a newsletter.

To configure a subscription for a Web user, proceed as follows:

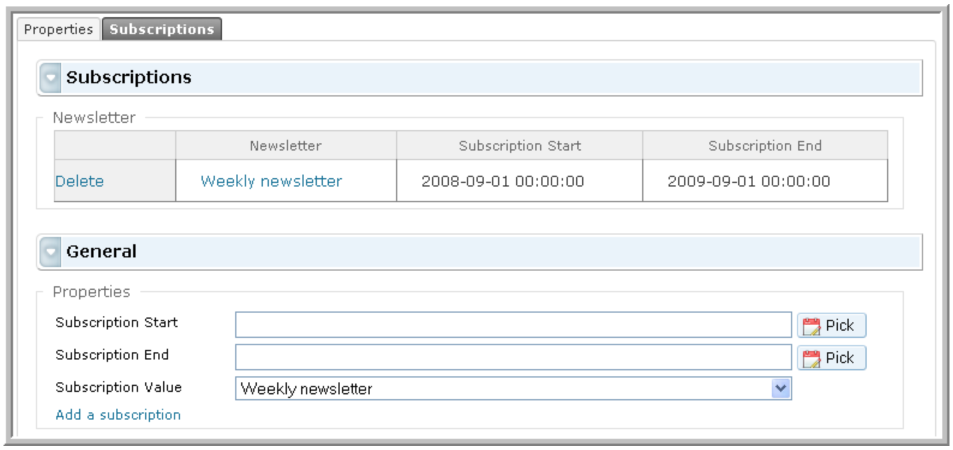
1. Configure a new user as described previously.

   ### Tip

   To configure a newsletter subscriptions for an existing Web user, use **Manage>Web users** to locate the Web user, and proceed as described below.

2. Click the **Subscriptions** tab to open the **Subscriptions** page as shown below.

   Subscription page

3. Beside **Subscription Start**, click the **Pick** button and select the date the subscription takes effect.

4. Beside **Subscription End**, click the **Pick** button and select the date the subscription expires.

5. Beside **Subscription value**, select the newsletter to which the subscription applies.

6. Click **Add a subscription** to place this information under **Newsletter** at the top of the page.

7. Select **Save** or **Check-in** (according to your selected lock mode) to save your Web user's subscription information.

Configure a newsletter

A *newsletter* is a marketing tool that keeps internal staff or corporate clients informed of news, events and product developments. Newsletters are generally sent to individual recipients by email and/or posted online.

How newsletters are developed

The steps to develop a newsletter are listed in the table below.

Table 8.1. Steps to create a newsletter

Step	Tool	User role
1. Create articles, polls, photos and other content for the newsletter.	WCM	Web editor
2. Configure a newsletter as described below.	WCM	Web editor
3. Configure newsletter templates and generation rules.	WCM	Web developer
4. Generate the newsletter.	WCM	Web developer
5. Drop the newsletter in a folder where a third-party mass-mailing system will pick it up.	Network	Web developer

Configure a newsletter

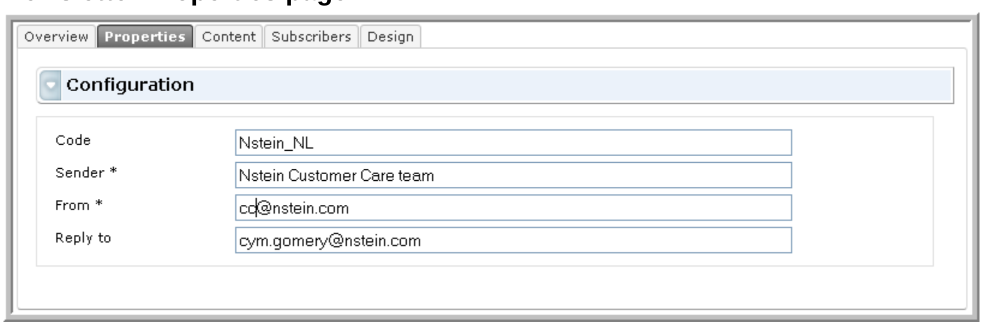
Important

Before attempting the procedures in this section, use WCM to create all the articles, news items and other content that you plan to include in your newsletter.

To configure a newsletter, proceed as follows:

1. Log in to WCM.
2. From the menu bar, choose **Create>Newsletter** to open the **Newsletter <New>** window. Click the **Properties** tab to open the **Properties** page as shown below.

   Newsletter Properties page

3. Beside **Code** enter a string that will serve as a unique Unix identifier for the template.
4. Beside **Sender**, enter the name that you want to appear in the **From** field of newsletter recipients' emails.
5. Beside **From**, enter the email address of the sender.
6. Beside **Reply to**, enter the email address to which reply emails will be directed.
7. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your newsletter properties.

8. Configure the newsletter content as described below.

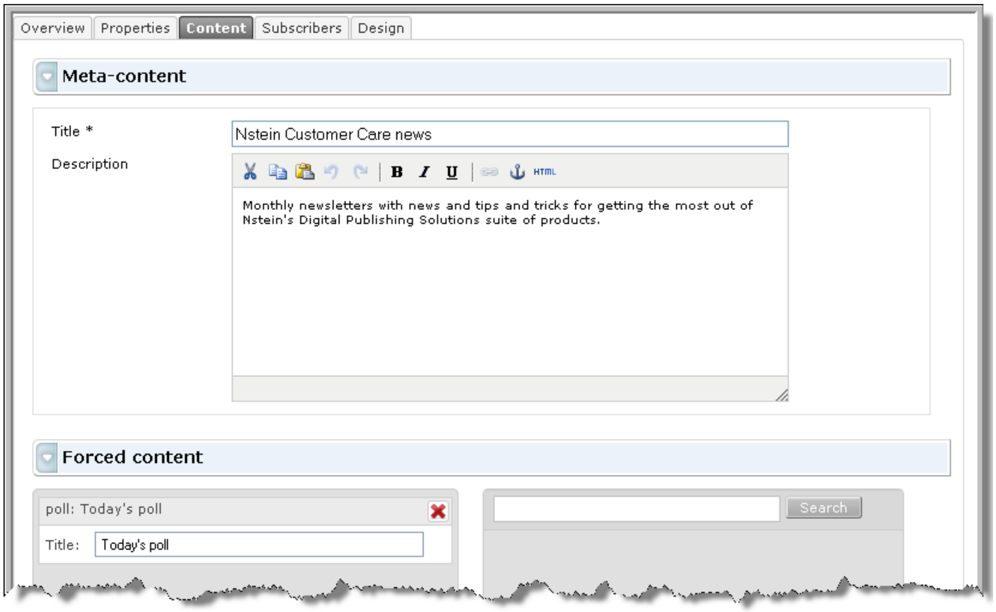
Configure newsletter content

To configure newsletter content, proceed as follows:

1. Configure a newsletter as described previously.

2. Click the **Content** tab to open the **Content** page as shown below.

Newsletter content page



3. Beside **Title**, enter a title for the newsletter.

4. Beside **Description**, enter a description.

5. Beside **Search**, enter a search criteria for the newsletter content you want to retrieve.

6. Click **Search**. The content meeting your search criteria will be displayed.

Tip

Click the **Date** button to order the search results by date.

7. To add a content object to your newsletter, drag it to the left pane under **Forced Content**. Repeat to add additional content.

8. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your newsletter content.

Specify HTML and plain text templates for the newsletter

Note

Some newsletter recipients may prefer a plain text version of the newsletter, in order to consult it from a wireless handheld device, or for other reasons.

To specify HTML and plain text templates for the newsletter, proceed as follows:

1. Configure a newsletter and its content as described previously.
2. Click the **Design** tab to open the **Design** page as shown below.

   Design page for a newsletter

3. Beside **HTML**, enter the path and name of the Smarty template that will generate an HTML newsletter.

   > *HTML* is the language of the World Wide Web and therefore allows for diverse formatting, different fonts, different styles, graphics, tables, hyperlinks and so on.

4. Beside **Plain text**, enter the path and name of the Smarty template that will generate a plain text version of the newsletter.
5. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your newsletter content.

Modify or cancel subscriptions

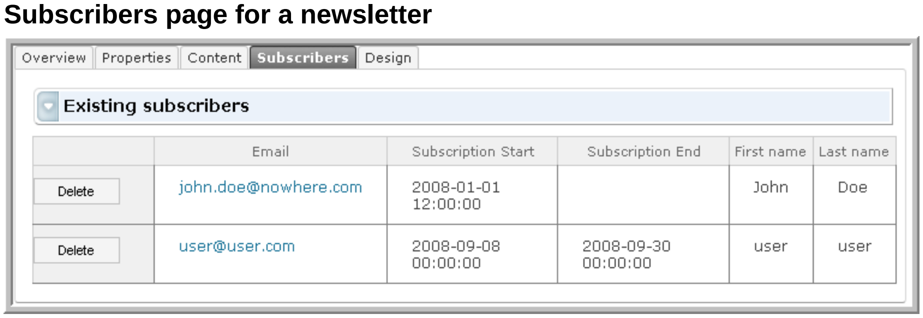
Note

To create a new subscription to a newsletter, see the section called “Subscribe a Web user to a newsletter”

To modify subscriber information or cancel a subscription, proceed as follows:

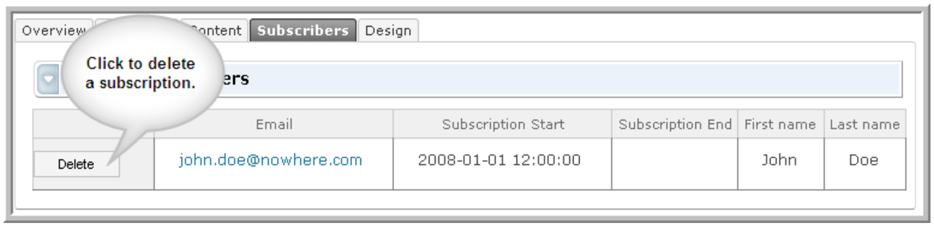
1. From the WCM menu bar, choose **Browse>Newsletters** to locate the newsletter whose subscribers you wish to manage, and click the pencil icon to open it.
2. If necessary, click **Check-out** to unlock the newsletter for editing.
3. Click the **Subscribers** tab to open the **Subscribers** page as shown below. This page lists the names, email address and subscription start and end dates for all existing subscribers.

   Subscribers page for a newsletter

4. To cancel a subscription, click the **Delete** button in the first column as shown below.

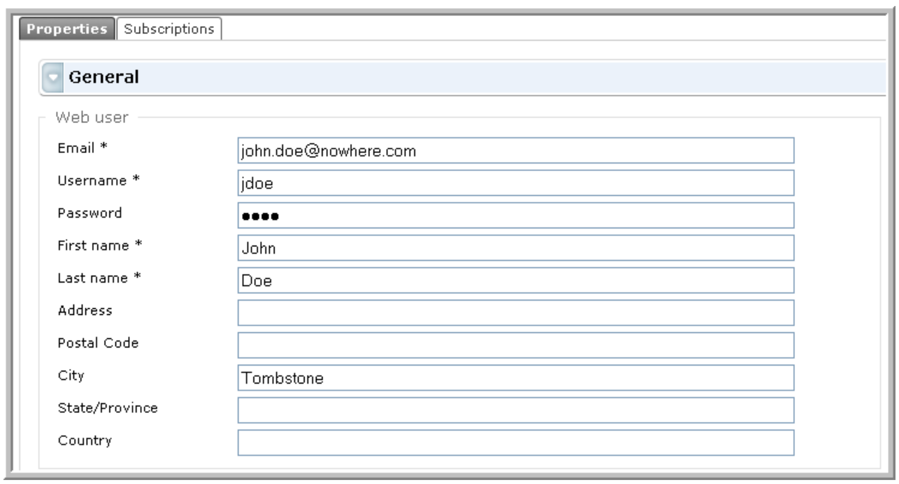
Cancelling a subscription



5. Select **Save** or **Check-in** (according to your selected lock mode) to update your newsletter's subscription information.

6. To modify the information for a user, or a subscription start and end date, click the email address in the **Email** column. Use the **Properties** page (shown below) and the **Subscriptions** page to enter new information as required, and save it.

Subscriber information



Part III. Web Templates and Publishing

Table of Contents

Chapter 1. Web Templates

This chapter provides WCM users with instructions to perform the following tasks:

1. Access template design resources.
2. Understand Web templates and how they are used.
3. Configure a Web template.
4. Back-up templates through the export function.
5. As an exercise, create and generate a "hello World" template.

WCM template design resources

Note

The WCM template engine is an extension of the popular Smarty template engine. The functions, modifiers and variables described in this appendix were created specifically for WCM. However, template developers can and will use other Smarty functions, modifiers and variables as well.

The sites and files listed below provide valuable information and instruction for the task of designing WCM templates.

1. See `http://www.smarty.net` for complete Smarty documentation.
2. Refer to the Nstein Support Network and the *WCM 4.0 Developer's Guide* for additional information on designing and coding templates.

Tip

Template path and backup path information is contained in the `[root]/xml/configuration.xml` file. An example of this information is provided below.

```
<templates> <path desc="Absolute filesystem path to templates, including trailing slash">C:\wamp\www\4.0.9144\business\templates\</path> <backupPath desc="Absolute filesystem path to templates backups, including trailing slash">C:\wamp/www\4.0.9144\business\backup\templates\<\backupPath> <\templates>
```

Caution

The `configuration.xml` file is located in: `[root]/xml/configuration.xml`. Other `configuration.xml` files should not be consulted or modified unless absolutely required by a system administrator.

About Web templates

Caution

The WCM application comes with preconfigured Web templates and WCM UI templates from the WCM demo. These templates are not meant to be used to create your publication's web site; they serve as an example of how templating works. The Web developer must create templates for his/her publication's specific sites, sections and content.

The templates are arranged in WCM file system folders where they can easily be accessed through your network.

Note

For information on the WCM user interface templates, see the Nstein Support Network or the *WCM 4.0 Developer's Guide*.

Web templates are the tpl format files that control the structure and variable content of your Web publication.

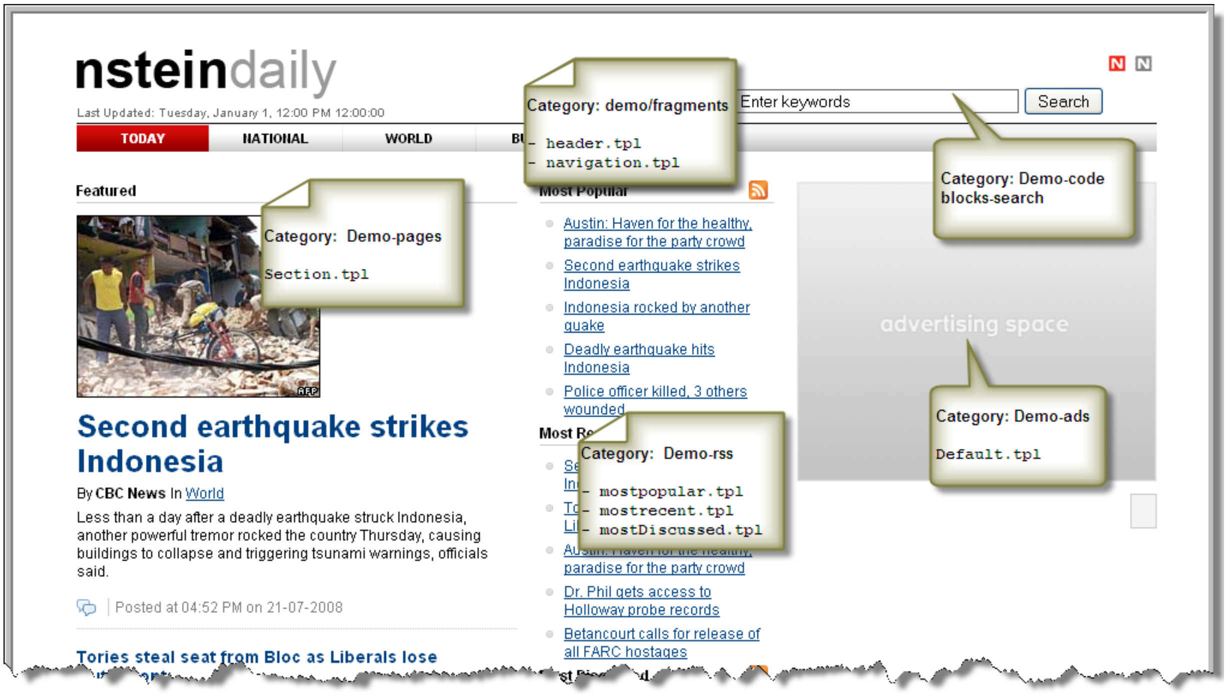
The table below shows the various Web templates provided in the out-of-the-box version of WCM.

Table 1.1. Web templates

Category	Where used
Business/Demo/pages	Web publication search, article, chapter and section pages.
Business/Demo/blocks/search	WCM search results pages
Business/Demo/blocks	WCM header, footer and menu bar
Business/Demo/webcontroller	Site dispatcher--holds routing instructions for various data. (This template is not a displayed Web page.)
Business/Demo/rss	Template for an RSS feed.

The screenshot below shows how the above templates are used to build a WCM section page.

Categories and templates for a Web page



Template file structures

WCM Web templates employ a hierarchical nested structure, in which each template contains little more than an "include" file which itself points to one or more additional templates. This structure has the advantage of being highly modular, light and adaptable, in that templates can be set up through a specialized editor outside of the WCM application, and then structured and called within the WCM application.

Note

The following Smarty code shows the syntax of the include command used within WCM templates:

Calling a template based on its location ("File" resource)

The "file" resource loads a template based on its location in the file system. The path can be absolute or relative. When the path is relative, the template engine uses the path relative to the templates folders located in the "smartypath" properties of the WCM configuration file (`xml/configuration.xml`). Thus, one could call a code block from within a template using the syntax:

```
{include file="my_template.tpl"}
```

This instruction would load the contents of a template located at `/usr/share/wcm/Smarty/templates/myTemplate.tpl` if the smartypath in configuration.xml is `/usr/share/wcm/Smarty/tempaltes/`.

Calling a template based on its name ("DB" resource)

The "db" resource calls a template based on its *unique code*, a literal string used to invoke a specific template. Thus, if the WCM contains a template with the unique code **myTemplate**, one would use the following expression to call this template from within another template:

```
{include file="db:myTemplate"}
```

Caution

Be sure to use the configuration.xml file located in: `[root]/xml/configuration.xml`. Other `configuration.xml` files should not be consulted or modified unless absolutely required by a system administrator.

Configure a Web template

This procedure can be used to configure any sort of Web template, be it a master page, a sub-page, or a code block used within the page.

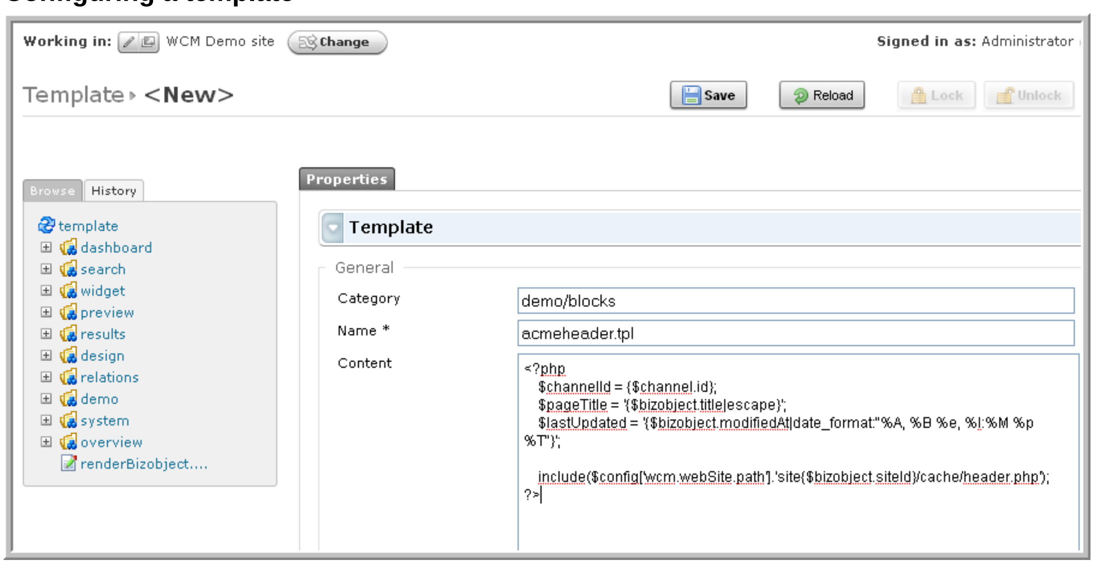
Note

Before beginning, create a template.

To configure a Web template, proceed as follows:

1. Log in to WCM, and from the menu bar, choose **Publish>Manage templates** to open the **Template** window as shown below.

   Configuring a template

   ### Caution

   Do not select an existing template category or template and simply change the category name and then save; doing so will move the existing template to your new category--it will not create a copy.

2. Beside **Category**, enter a category that will serve as the directory name for your template.

3. Beside **Name**, enter the name of the template.

4. Beside **Content**, paste code copied from a template you created yourself or from one of the WCM demo templates.

5. Click **Save** to save the template. Your new template will be added to the template directory specified in Step 2.

Manage backed-up templates

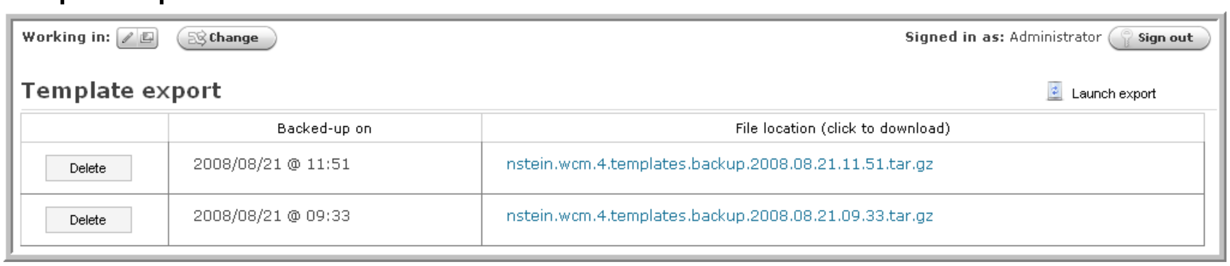
The WCM export function is used to create copies of existing templates which can then be retrieved if a template is lost or corrupted.

To back up templates, proceed as follows:

1. Log in to WCM.

2. From the menu bar, choose **Publish>Template backup** to open the **Template export** window as shown below.

Template export window



3. Do one of the following:

   - To export templates, click **Launch export**.
   - To delete a backed up template, click **Delete**.
   - To open a backed-up template file, click the template name.

Sample exercise: Create and generate a 'Hello World' template

Templates are stored in the directory specified in the `configuration.xml` file within a `templates` tag. Here is what it might look like:

```
<templates>
    <path desc="Absolute filesystem path to templates, including trailing slash">
    /var/www/wcm-4.0.9716/business/templates/</path>
    <backupPath desc="Absolute filesystem path to templates backups, including trailing slash">
    /var/www/wcm-4.0.9716/business/backup/templates/</backupPath>
</templates>
```

Caution

The configuration.xml file is located in: `[WCM root]\xml\configuration.xml`. Other `configuration.xml` files should not be consulted or modified unless absolutely required by a system administrator.

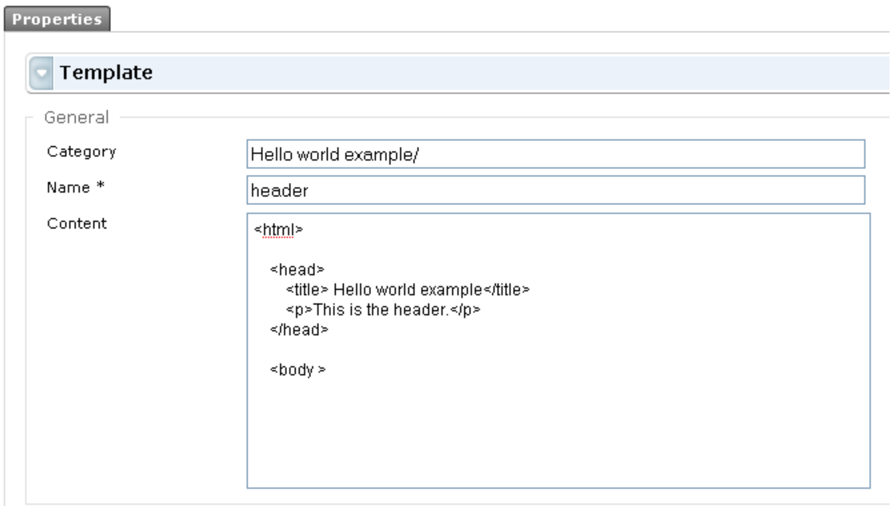
We will begin by creating three simple templates to be used as building blocks to create a static web page: `header.tpl, footer.tpl and content.tpl`. In actual practice, Web developers create templates using content objects and other dynamic content to populate the page. These functions go beyond the scope of this example but are explained in the *WCM 4.0 Developer's Guide*. Think of this example as a starting point to understand how templates are used to generate the pages of your site.

Task 1: Create a header template

To create a header template, proceed as follows:

1. From the WCM menu bar, select **Publish>Manage Templates** to open the **Properties** page as shown below.

   Creating a header template



2. Beside **Category** enter `Hello world example`. This will be the name of a new category of templates for the example. It will also be the name of a directory in your directory structure that will contain the template files belonging to this category. The directory will be created automatically and will be located here: `[WCM root path]/business/templates/Hello world example/`.

3. Beside **Name**, enter `header`. When this template file gets generated it will have the extension `.tpl` added to it, identifying it as a template file. The file will be located here: `[WCM root path]/business/templates/Hello world example/header.tpl`.

4. Beside **Context**, enter the contents of the template file. For this example you can just type the code in the field as it is very simple. The normal way a web creator would go about creating the template file would be to use a text editor to create the file and then just copy and paste the contents into the **Context** field. Enter the text as shown below:

```
<html>
    <head>
        <title>Hello world example</title>
        <p>This is the header.</p>
    </head>
    <body>
```

5. Click **Save** to save the category and the file.

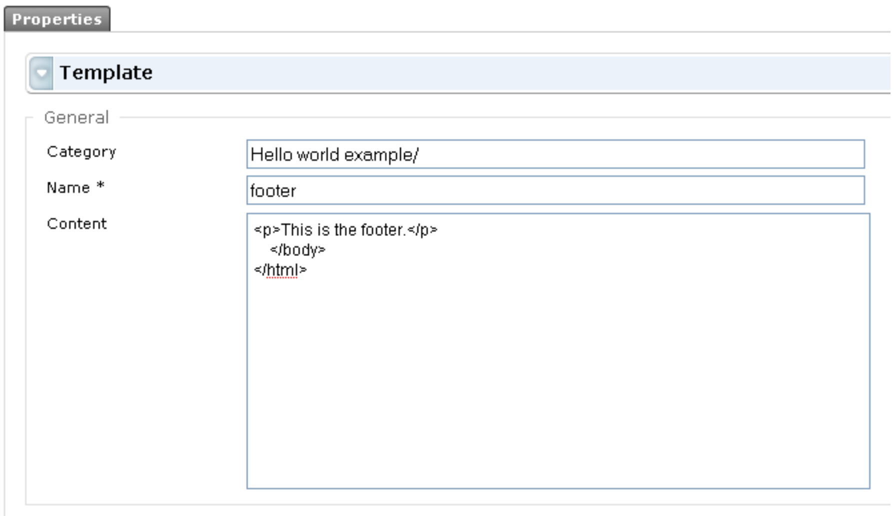
6. Click on **template** under the **Browse** pane at left to refresh the template list; the **Hello world example** category will appear. If you click on it you will see **header.tpl**. Click on that to display information relative to the template file you have just created.

Task 2: Create a footer template.

To create a footer template, proceed as follows:

1. From the WCM menu bar, choose **Publish>Manage Templates** to open the **Properties** page as shown below.

   Creating a footer template



2. Beside **Category**, enter `Hello world example` to specify the category for the template.

3. Beside **Name**, enter: `footer`. This will create the template name `footer.tpl`.

4. Beside **Context**, enter the code for the footer part of your web page. Enter the text as shown below:

```
        <p>This is the footer.</p>
    </body>
</html>
```

5. Click on **Save** to save the footer template.

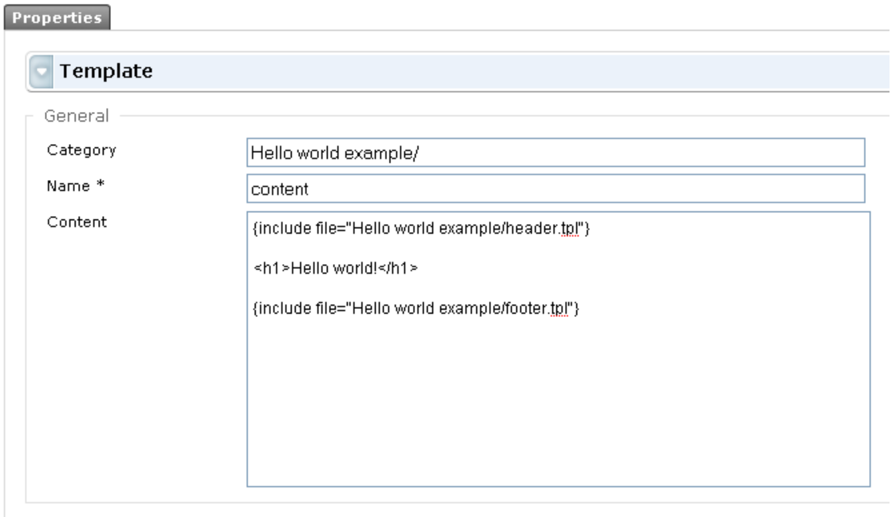
6. Click on **template** under the **Browse** pane at left to refresh the template list; the **Hello world example** category will appear. If you click on it you will see **footer.tpl**. Click on that to display information relative to the template file you have just created.

Task 3: Create the content template

To create the content template, proceed as follows:

1. From the WCM menu bar, choose **Publish>Manage Templates** to open the **Properties** page as shown below.

   Creating a content template



2. Beside **Category**, enter `Hello world example` to specify the category for the template.

3. Beside **Name**, enter: `content`. This will create the template name `content.tpl`.

4. Beside **Context**, enter the code for the content part of your web page. Enter the text as shown below:

```
{include file="Hello world example/header.tpl"}
        <h1>Hello world!</h1>
{include file="Hello world example/footer.tpl"}
```

Tip

In this part of the example, Smarty tags are used. Smarty tags simplify web creation and are tied into WCM to make using content objects simple. For now, all you need to know is that the code contained between curly braces { } is Smarty code and that the include directive is equivalent to copying the contents from the specified file into the current file. This is the basis of using templates as building blocks, a user can have many different templates for different content types but will probably always use the same header and footer for a given site. This way the web creator does not have to re-type his header and footer and if it needs modifying it can be done in one file instead of having to modify all the pages of the web site and risk making a mistake.

For example, you can create a template for a navigation bar or your company logo and then include them into your header template, itself included in your page template that can also include an advertisement template--the possibilities are limitless thanks to its modular approach for web page development.

You might be wondering how the content objects get used within a template, it isn't all that complicated but a background in web development or programming does help, you can browse the templates included with WCM to get an idea or you can look at the online developers guide (*WCM 4.0 Developer's Guide*) that has examples and explains templates and Smarty in detail.

Task 4: Generate your template

Now that you've created a template, it would be nice to test if they worked and see how they get set up in WCM to become published. In the rest of the example we will quickly create generation rules for the example and generate the page. We will not go into detail about how generations work, for complete instructions on web page generation, see Part III, Chapter 3.

To generate your template, proceed as follows:

1. To create a generation set, from the WCM menu bar, choose **Publish>Manage generation rules**. Enter the information for the generation set with reference to the screenshot below.

   Creating a generation set

2. Click **Save**.

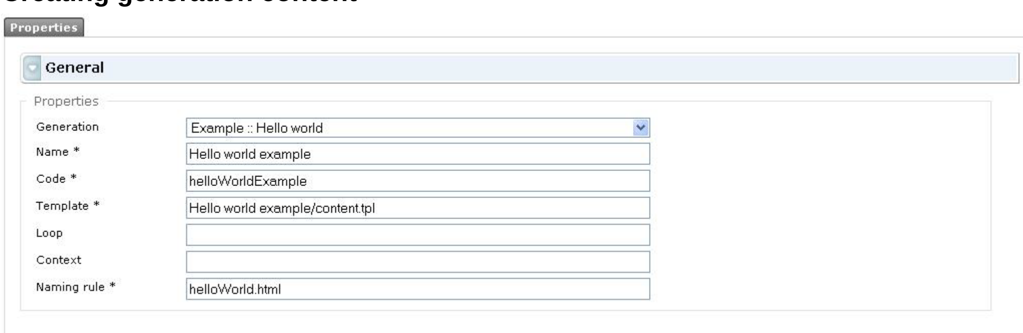
3. To create a generation object, click **New generation**. Enter the information for the generation object with reference to the screenshot below.

   Creating a generation object

4. To create generation content, click **New generation content**. Enter the information for the generation content with reference to the screenshot below.

   Creating generation content

5. Click **Save**.

6. To generate the page, click **Execute**. The generation rule window will pop up.

7. If it is not already selected, next to **Select generation rule** select

   :: :: Hello world example. Click **Start**.

8. The generation of this example will be extremely quick. If after a second nothing appears, click on the refresh button. If all the steps where correctly followed, the last message in the window will be **Task has ended**. Click **Close** in the generation rule pop-up window to close the window.

9. Now we can go and look at the web page that was generated. It will be located in the directory specified in the **Location** field of the generation set, for our example, `[WCM root path]\business\web\Hello world example\helloWorld.html`.

   Double click on the file to open it in your web browser, it should look like this:

Note

For more information on templates, smarty and incorporating your content objects and other dynamic content in the pages, consult the development guide.

Chapter 2. Section Content and Layout

This chapter provides instructions to help WCM users perform the following tasks:

1. Configure content for a section.

2. Configure URL and related content for a section.

3. Design section layout.

4. Preview a section Web page.

Configure section content

Use the procedure below to add custom content according to any criteria you like, based on a previously-created saved search, a keyword search, or a search by date.

To choose the content that will appear in your section, proceed as follows:

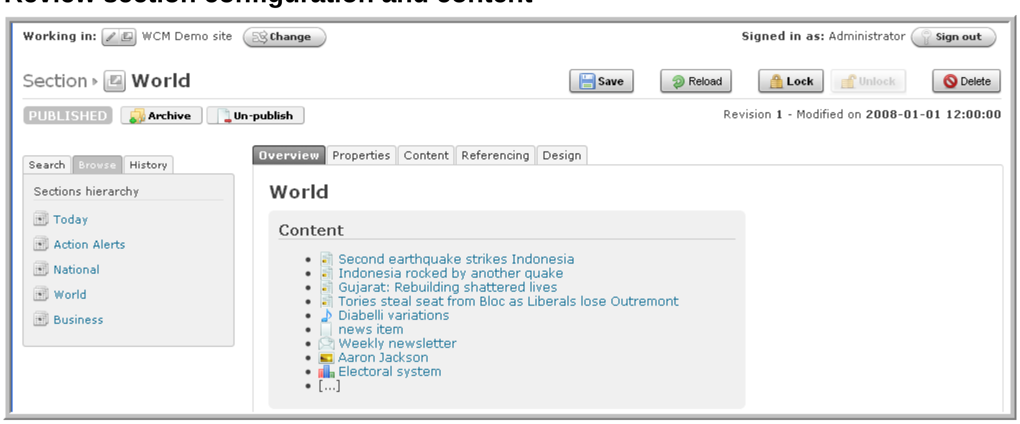
1. From WCM, select the site whose sections and content you wish to configure.

2. From the WCM menu bar, choose **Manage>Site sections** to open the **Section** window.

3. In the left pane, click the **Browse** tab to display all configured sections for the current site as shown below.

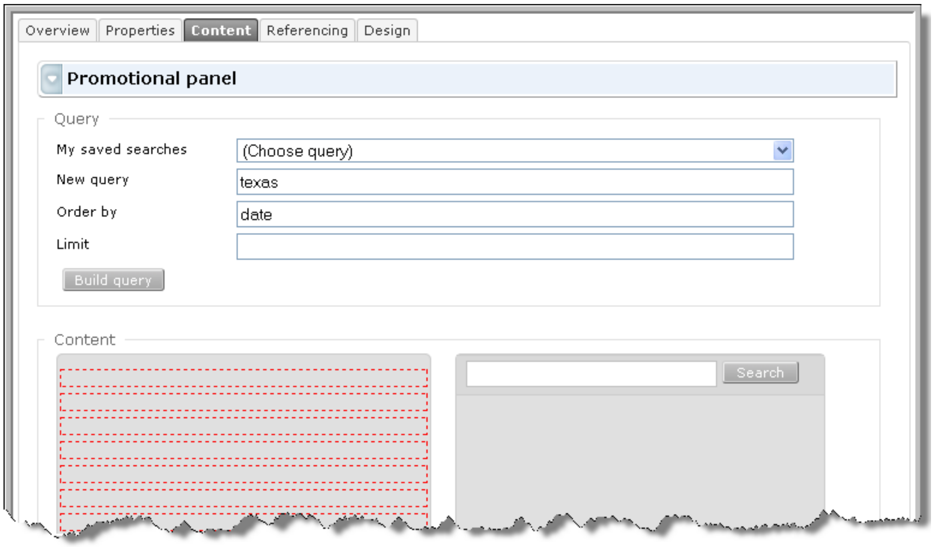
4. Click a section name in the list to select it. The **Overview** page displays all content configured for the section, as shown below. Click the **Properties** tab to review the section properties.

   Review section configuration and content

5. Click the **Content** tab to open the **Content** page as shown below.

   Set up section content



6. Do one of the following:

   - To use a saved search you created earlier, select a saved search beside **My saved searches**.
   - To create a new saved search for the section content, enter keywords beside **New query**.

7. Beside **Order by**, enter the parameter to be used to order the search results. For example, if you enter *title*, the results will be ordered by title.

8. (Optional) Beside **Limit**, enter a value to limit the number of results that will be returned. This is useful where your database is huge and you wish to work with a limited number of returns.

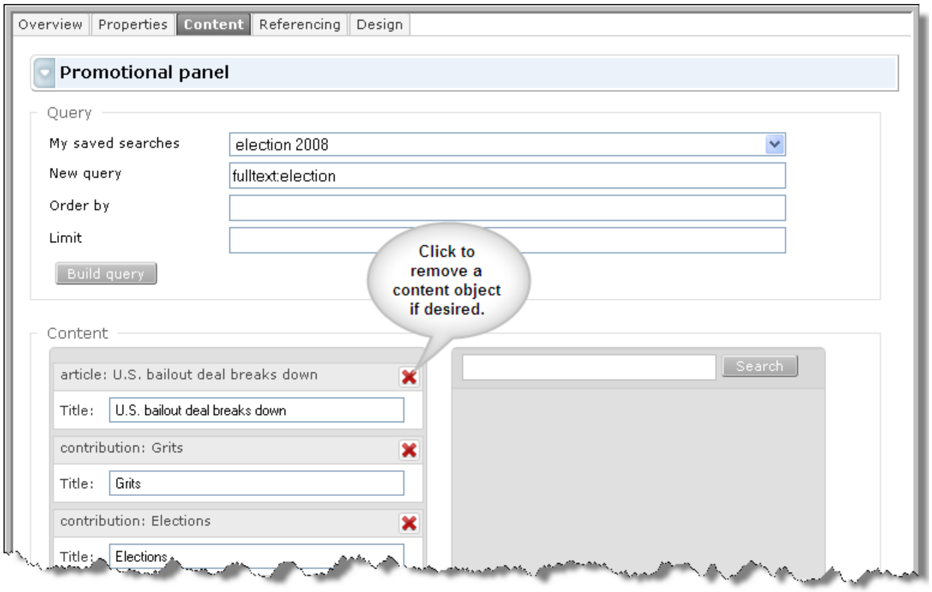
9. Click **Build query** to run the saved search.

Tip

Alternatively, enter keywords in the **Search** field and click **Search**.

10. The query results will be placed in the **Content** pane. If desired, click the X beside any content objects you do not want to include in the section, as shown below.

    Section content



11. When you are done, click **Save** or **Check-in** to save your section content.

Configure URL and related content for a section

Tip

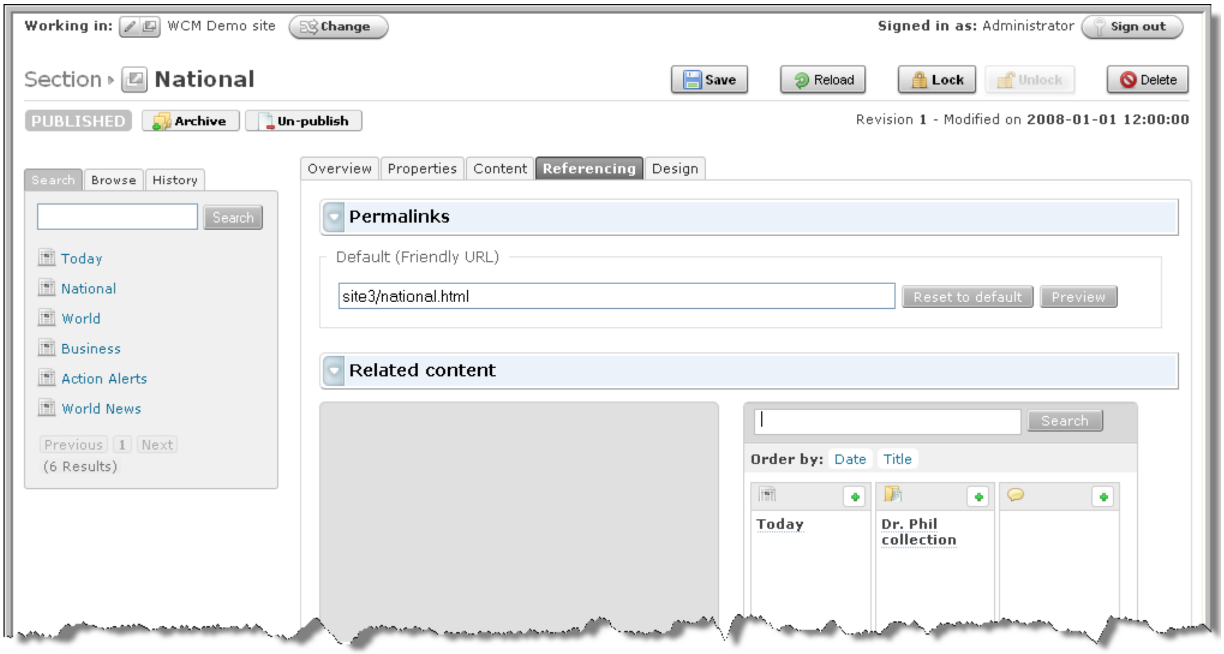
The keywords used in a URL, along with domain name, title (headline) and sub-head are considered the top four factors used by Google to rank pages.

To configure the URL for a section, proceed as follows:

1. From the WCM menu bar, choose **Manage>Site sections** and select the section you want to configure under the **Browse** tab in the left pane.

2. Click the **Referencing** tab to open the **Referencing** page as shown below.

   URL for a section



3. The **Default (Friendly URL)** field will be auto-filled with the information from the **Naming rule** field in the **Generation Content** window for sections. To replace the default URL with a custom URL, enter an alternative path in this field.

4. In the **Search** field, enter a keyword related to your section. For example, if you are configuring related content for the Entertainment section, you might enter "hollywood" as your keyword.

   ### Note

   For search tips, see the section called “Keyword search”.

5. Click **Search**. The content meeting your search criteria will be displayed.

6. To add related content links to your section, drag the desired content object to the left pane. Repeat to add additional content links if desired.

7. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your section.

   ### Note

   Be sure to include the related content TME widget when you design the section layout.

Design section layout using drag-and-drop widgets

Caution

You must design layout for sections before you can generate your Section Web pages. If you do not do so, no pages will be generated because there will be no content.

WCM 4.0 allows editors to control the nature and layout of content for sections, articles and collections by means of drag and drop widgets.

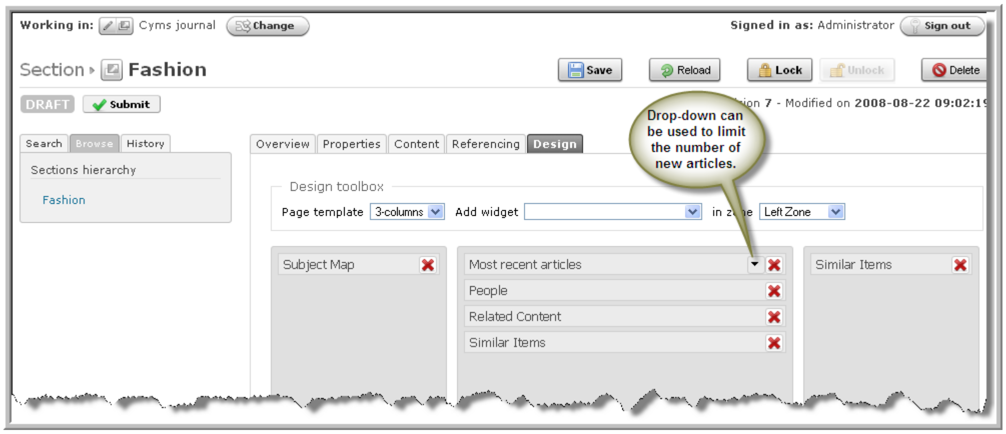
> *Widgets* are code modules that represent content types and TME-generated metadata.

To design content layout for a section, proceed as follows:

1. From the WCM menu bar, choose **Manage>Site sections** and select the section you want to configure under the **Browse** tab in the left pane.

2. Click the **Design** tab to open the **Design** page as shown below.

   Widgets for a section



3. Beside **Page template**, choose the number of columns you want displayed on your section page.

4. Beside **in zone**, select the column for which to set up content.

5. Beside **Add widget**, select a widget representing content or TME metadata. It will immediately be placed in the grey zone representing the selected column of the section page. Repeat to add additional widgets until you have all the desired widgets for your section.

   - If desired, drag widgets to other zones to achieve an optimal layout.
   - To delete a widget, click the X to the right of the widget label.

   ### Tip

   To ensure that the related content you selected in the **Referencing** page is included in your section layout, be sure to include the **Related Articles** widget.

6. When you are done, select **Save** or **Check-in** (according to your selected lock mode to save your changes.

Preview a section page

Caution

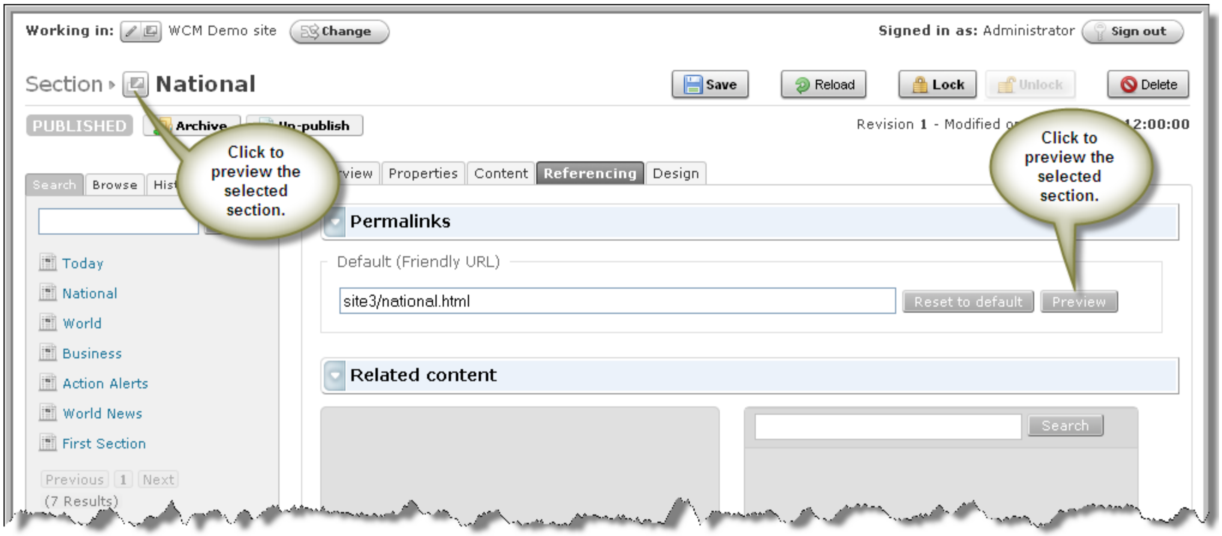
The appearance of the preview will depend on the preview templates set up by a Web developer. The preview template can be coded to be a mirror image of an existing Web page, although it will be generic--thus, for example, if one week's edition of your Web publication contains a special custom advertising block, this layout will not appear in the preview.

To preview a section page and its content as it will appear online, proceed as follows:

1. From the WCM menu bar, choose **Manage>Site sections** and select a section from the **Browse** pane. Design a layout for the page content as described previously.

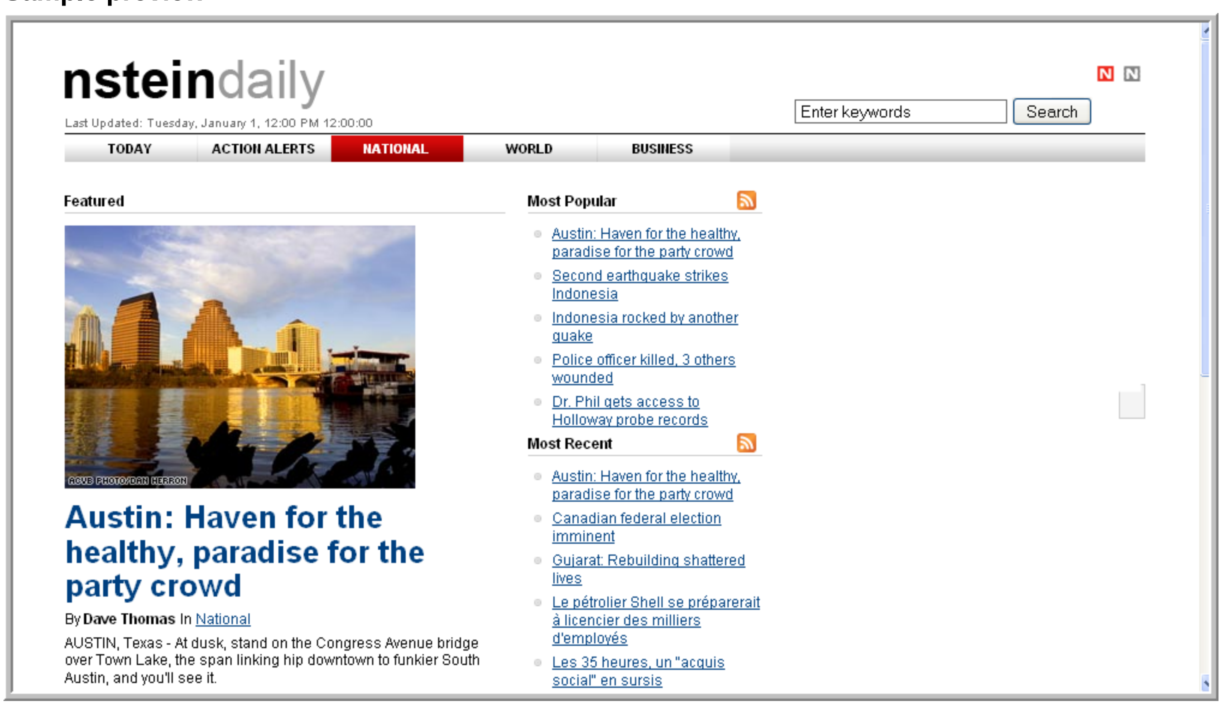
2. Select the **Referencing** tab to open the **Referencing** page as shown below.

Referencing page for a section



3. Click **Preview**. See below for a sample of a preview.

Sample preview



4. To view the pre-publication checklist, click here.

Chapter 3. Web Content Generation

In order to generate Web content, all the code previously set up in the various WCM templates is executed and published to a Web server, where it can subsequently be viewed in a browser.

WCM users can use WCM to generate Web content as well as RSS feeds, newsletters and other files.

This chapter provides WCM users with information to perform the following tasks:

1. Review the steps required to successfully generate content, using a checklist.

2. Configure generation sets and generation objects for your home page (site object) and section pages.

3. Generate Web content.

Publication checklist

The table below summarizes all the steps required to publish Web content.

☐	1. Ensure that all new content for the publication has been submitted.
☐	2. For pessimistic lock mode users, ensure that all required content has been checked-in. For optimistic lock mode users, ensure that none of the required content is locked. For a large editorial team, this may require an email reminder.
☐	3. Review your publication's content to ensure the following:
	- Required photos have been added (for articles, news items, items, collections).
	- Related content hyperlinks have been added.
	- IPTC codes and tags have been added.
	- Metadata tags have been added.
	- The content layout has been configured (articles, news items, collections).
☐	4. Configure all required templates for the site.
☐	5. Configure URL and related content for each section in your site.
☐	6. Configure generation sets, generation objects and generation content for the pages of the site.
☐	7. Generate Web content.

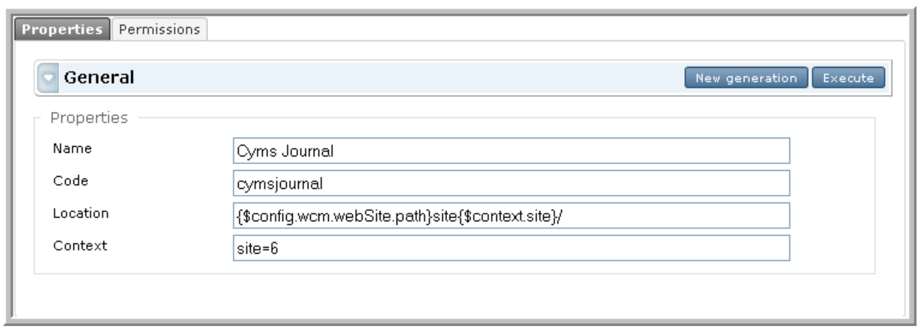
Configure a generation set and a generation object

> A *generation set* is an object that contains the name, code name, and location for an entire site or other set of generated pages.
>
> A *generation object* allows users to organize data within a generation set. For example, the "Mega Times" generation set could include three generation objects named "Master page", "Variable content", and "TME data".
>
> You must configure a generation set and at least one generation object for distinct page type that you wish to generate in WCM (for example, home page, section page, article page, poll page, collection page).

To configure a generation set and a generation object, proceed as follows:

1. From the WCM menu bar, choose **Publish>Manage generation rules** to open the **Generation Set** window as shown below.

   Configure a generation set

   ## Note

   The **Execute** button in the above screenshot is used to generate Web content. Do not use this function until you have configured the required generation sets, generation objects and generation content.

2. Beside **Name**, enter the name of the site or any other set of Web pages or files to be generated.

3. Beside **Code**, enter the string (no spaces) that will be used to identify the site (or other generation set) in the code.

4. Beside **Location**, enter the absolute path to the directory in your file server.

   ## Tip

   In the example screenshot above, the path `{$config.wcm.webSite.path}site{$context.site}/` variables tell WCM to use the website path defined in the `configuration.xml` file, and to replace `{$context.site)` with the number of the current site (for example, site6).

   To know the ID of your site, select **Manage>Site sections**, select a section, click **Referencing** and check the site number in the path under **Default (Friendly URL)**.

Caution

The `configuration.xml` file is located in: `[root]/xml/configuration.xml`. Other `configuration.xml` files should not be consulted or modified unless absolutely required by a system administrator.

5. Beside **Context**, enter the site ID, using the syntax `site=[siteid]`.

Tip

You could also configure a generation for generating all sites at once by defining a loop command in the **Context** field.

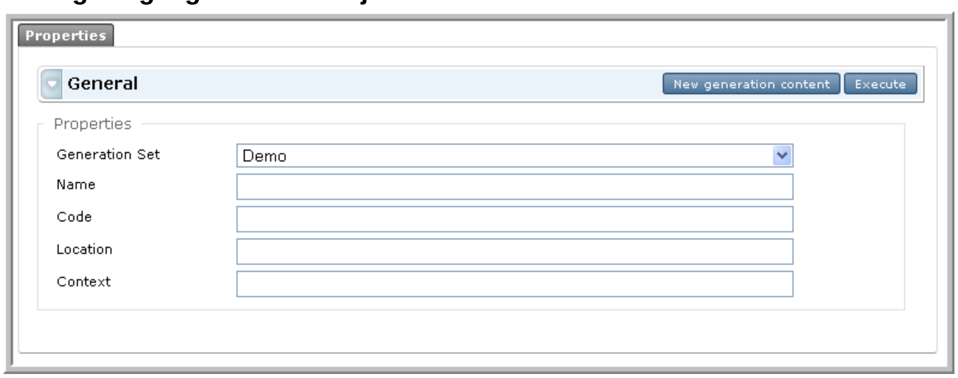
Tip

To check the site ID for a site, select **Advanced Searches>Editorial** and open the **Web Site** list. The ID for each site is displayed along with the respective site names.

6. Select **Save** or **Check-in** (according to your selected lock mode) to save your generation set.

7. To configure the generation object, click the **New Generation** button.

Configuring a generation object



8. Beside **Generation Set**, select the generation set for the generation object.

9. Beside **Name**, enter a name for the generation object, that gives some clue as to the type of content it will hold. For example, a generation object called "Master pages" could be used to hold the section page and article page generation content.

10. Fill in the **Code**, **Location**, and **Context** fields, with reference to Steps 3 to 5 above.

11. Select **Save** or **Check-in** (according to your selected lock mode) to save your generation object.

Configure generation content

Note

Before attempting this procedure, you must have created the templates required and saved them in a folder for the relevant site.

Generation content is the set of parameters for a Web page (for example a section page): its name, template, instructions for including content, variables and the naming rule for the page's URL.

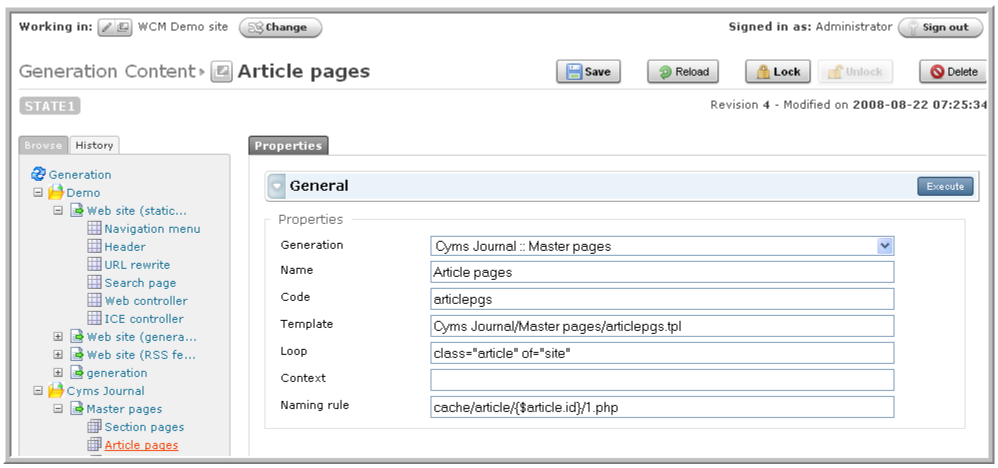
To configure generation content, proceed as follows:

1. Configure a generation set and a generation object for the Web page. In the generation object window, click the **New generation content** button to open the **Generation Content** window as shown below.

Note

If you are not currently in the **Generation** window, click **Publish>Manage generation rules** and select the Generation object before clicking **New generation content**.

Configure generation content



2. Beside **Generation**, select a generation object for this content.

3. Beside **Name**, enter the name of the Web pages to be generated.

4. Beside **Code**, enter the unique string (no spaces) that will be used to identify the generated content in the code.

Caution

This must be a unique string that has not be used for any other generation content.

5. Beside **Template**, enter the path to the template to be used to generate the content.

6. Beside **Loop**, enter the content type to be used in the page or page segment, and the applicable site. In the sample screen shot above, articles that have been created for each site will be generated as article pages. The number of articles and the dates are controlled by instructions within the templates themselves.

7. Beside **Naming rule**, enter the naming syntax for the generated file.

Tip

For example, suppose you want to generate article 39, entitled *Beckham visits Africa*. The naming rule `article/{$article.id}_{$article.title|url}` would generate the name **/article/39_Beckam_visits_Africa.html**.

8. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your generation content.

Generate Web content

Caution

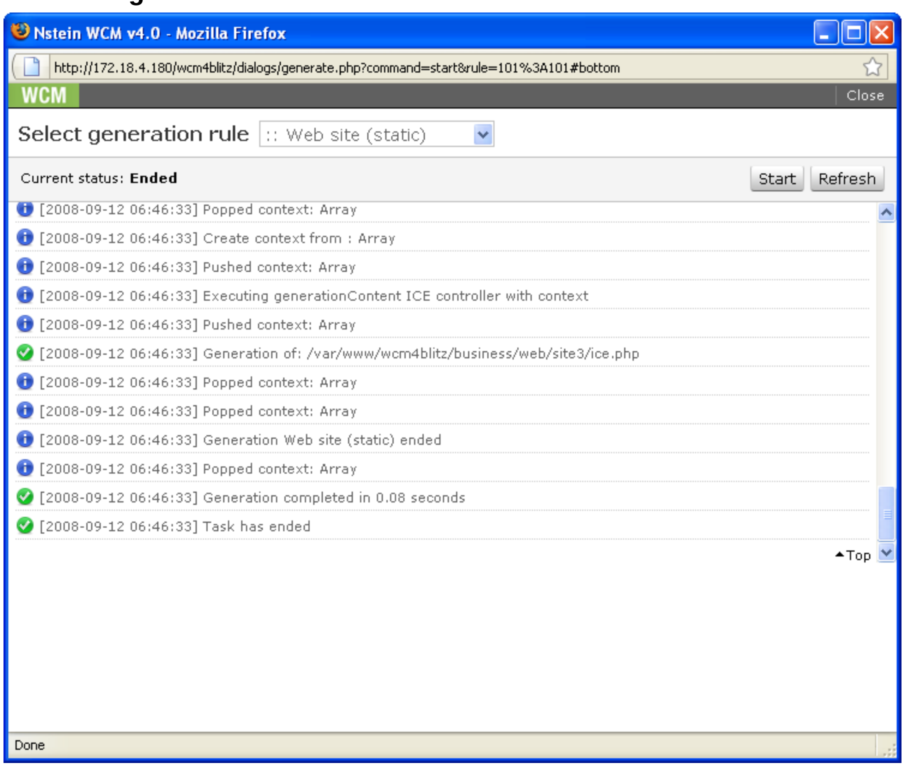
Before attempting this step, ensure that you have configured all required templates, generation sets, objects and content required to successfully generate Web pages for your online publication.

Ensure that page content and layout has been configured for the content being generated.

To generate Web pages for your publication, proceed as follows:

1. From the WCM menu bar, choose **Publish>Launch generation** to open the **Select generation rule** window shown below.

Generating a site



Note

The window for your site will not appear exactly as shown above--the data displayed will be specific to your online publication's setup and content.

2. Open the drop-down menu and select the name of your Web publication or of the Web pages you wish to generate.
3. Click **Start**. The generation progress will be displayed in the window. When the site has been generated, you will see the message: **Ended**.
4. Click **Close** to close the **Generation** window.
5. To display the generated site or pages, open a browser and enter the site or page address in the browser window.

Part IV. WCM User Administration

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Chapter 1. Manage Access Permissions

> *Permissions* settings control the ability of users to view or make changes to WCM objects and data. Permissions are configured by associating each user with a certain user group, which is in turn associated with certain permissions.

The permissions configured within WCM determine the functions available to various users.

This chapter provides WCM users with instructions for performing the following permissions tasks:

1. Create a user group and the following permissions:
   - Permissions for menus.
   - Permissions for various sites.
   - Permissions for generations.
   - Permissions for content types.
   - Permissions for system classes.
2. Display a group's users and permissions.
3. Configure users and add them to one or more groups.
4. Display a user's groups.
5. Add or remove groups for a user.
6. Delete a group.
7. Delete a user.

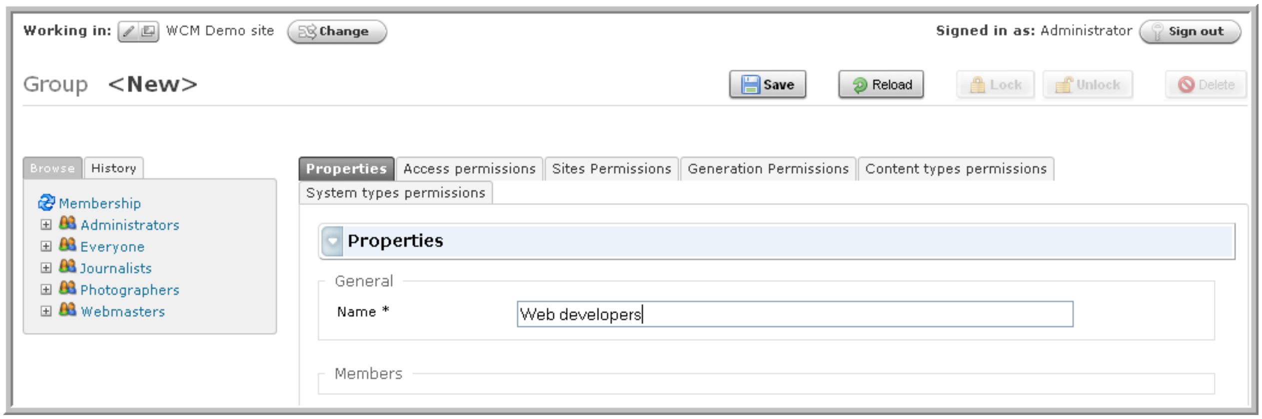
Create a user group

> A *user group* is a group of individuals that uses WCM to perform similar tasks. For example, one might create a "Software administrators" group, a "Web developers" group, and for content management functions, groups such as Editors, Photographers, and so on.

To create a user group, proceed as follows:

1. Log in to WCM.
2. From the WCM menu bar, choose **System>Manage users and groups** to open the **Group** window as shown below. The **Properties** page is active by default.

   Group window



3. Beside **Name**, enter the name of the group you want to create.

Note

Once you have added members to your group, the **Members** portion of the window will display member names.

4. Select **Save** or **Check-in** (according to your selected lock mode) to save your group properties.

5. Configure menu permissions for the group as described below.

Configure permissions for menus

Menu permissions allow you to impose very granular access to WCM functions. The procedure that follows will control what menus users can view and hence what functions they can access. Some forethought is required in order to ensure that you do not leave any menus out (for example, if you allow Journalist type users to access articles but not photos, they will not be able to attach photos to their articles).

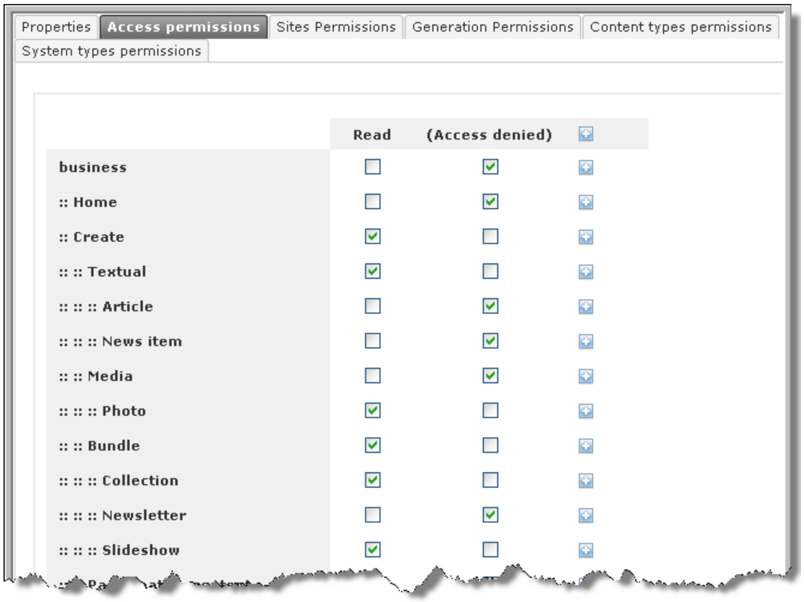
To configure group permissions for WCM menus, proceed as follows:

1. From the WCM menu bar, choose **System>Manage users and groups**. From the **Browse** pane at left, select the name of the group whose permissions you wish to configure.

2. If necessary, click **Check-out** to open the group information for editing.

3. Click the **Access permissions** tab to open the associated page as shown below.

Access permissions page



Tip

Clicking the plus icon in a row will toggle the selections for that row. Clicking the plus icon at the top of the icons column will toggle all selections for the page.

4. To configure the menu options that can be used by this group's members, select the desired check boxes in the **Read** column.

Note

Be sure to clear the **Access denied** column if you have selected **Read** permissions in a row.

5. To configure the menu options that the group members will not be able to use, select the desired check boxes in the **(Access denied)** column.

6. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your settings.

Configure permissions for sites

Note

Before attempting this procedure, configure the sites for which you will be configuring permissions. For example, to configure group permissions to your "Whoville Whistler" publication, you must first create a "Whoville Whistler" site object.

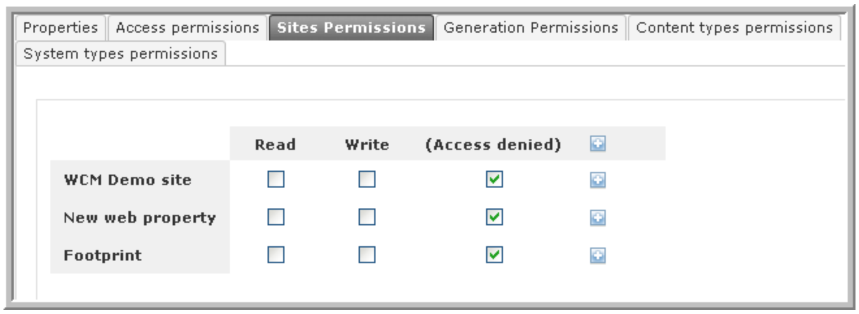
To configure each group's ability to access and edit various sites, proceed as follows:

1. From the WCM menu bar, choose **System>Manage users and groups**. From the pane at left, select the name of the group whose permissions you wish to configure.

2. If necessary, click **Check-out** to open the group for editing.

3. Click the **Sites Permissions** tab to open the associated page shown below. This page lists all the sites that have been configured.

Sites Permissions page



Tip

Clicking the plus icon in a row will toggle the selections for that row. Clicking the plus icon at the top of the icons column will toggle all selections for the page.

4. To configure the sites for which this group has **Read** permissions, select the desired check boxes in the **Read** column.

5. To configure the sites for which this group has **Write** permissions, select the desired check boxes in the **Write** column.

Note

If a user belongs to a group that does not have write permissions for a site, the user will be able to view objects for that site, but the **Save** or **Check-in** button (as applicable) will be missing.

Note

Be sure to clear the **Access denied** column if you have selected one of the above permissions in a row.

6. To deny the group access to a site, select **(Access denied)**.

7. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your settings.

Configure permissions for generations

Note

The procedure below controls the sites for which group members can generate Web pages. For more information on generations, see the section called "Configure a generation set and a generation object"

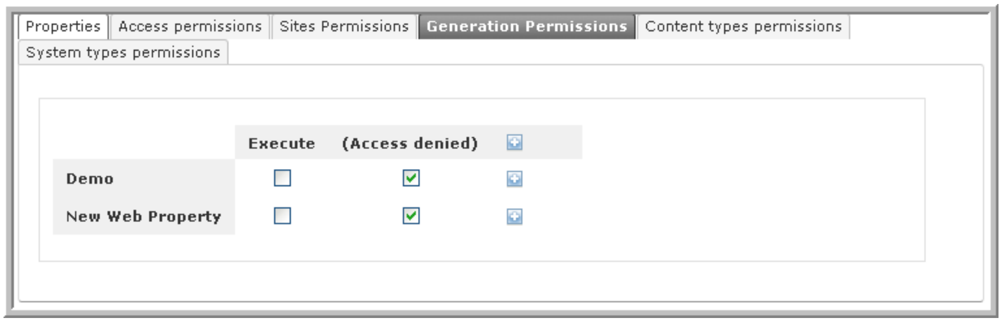
To configure group permissions for generations, proceed as follows:

1. If you have just configured a group and have the **Group** window open, skip to Step 3. Otherwise, from the WCM menu bar, choose **System>Manage users and groups**. From the pane at left, select the name of the group whose permissions you wish to configure.

2. If necessary, click **Check-out** to open the group for editing.

3. Click the **Generation Permissions** tab to open the associated page shown below.

   Generation Permissions page



Tip

Clicking the plus icon in a row will toggle the selections for that row. Clicking the plus icon at the top of the icons column will toggle all selections for the page.

4. To allow the selected group to generate Web pages for a site, select the **Execute** checkbox beside the site name.

Note

Be sure to clear the **Access denied** column if you have selected one of the above permissions in a row.

5. To prevent the selected group from generating Web pages for a site, select the **(Access denied)** checkbox.

6. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your settings.

Configure permissions for content types

> In WCM, *content types* represent categories of content (such as photos) configured through WCM menus and windows.

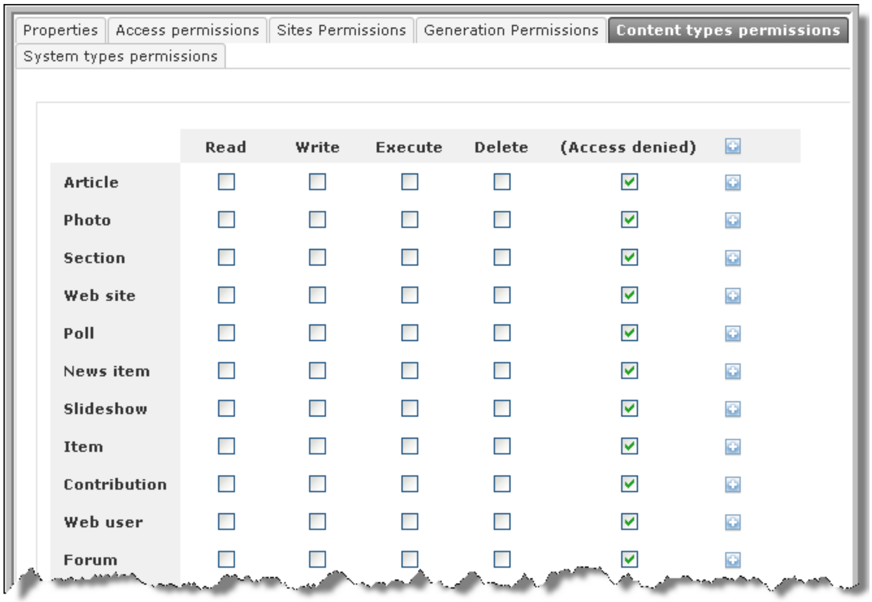
To configure a group's permissions for various content types, proceed as follows:

1. If you have just configured a group and have the **Group** window open, skip to Step 3. Otherwise, from the WCM menu bar, choose **System>Manage users and groups**. From the pane at left, select the name of the group whose permissions you wish to configure.

2. If necessary, click **Check-out** to open the group for editing.

3. Click the **Content types permissions** tab to open the associated page shown below.

   Content types permissions page



Tip

Clicking the plus icon in a row will toggle the selections for that row. Clicking the plus icon at the top of the icons column will toggle all selections for the page.

4. To configure the content types for which this group has **Read** permissions, select the desired check boxes in the **Read** column.

5. To configure the content types for which this group has **Write** permissions, select the desired check boxes in the **Write** column.

6. To configure the content types for which this group has **Delete** permissions, select the desired check boxes in the **Delete** column.

Note

The **Execute** option does not apply to content types and selecting it will have no effect.

Note

Be sure to clear the **Access denied** column if you have selected one of the above permissions in a row.

7. Select **Access denied** to prevent group members from accessing or modifying the selected content type.

8. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your settings.

Note

To configure menu permissions for a group, click here.

Configure permissions for system classes

> WCM *system classes* are categories for the system objects that operate at the administrator or system level. Thus, a system class is a category, while a system object is an object instance within that category. WCM system classes include users, groups and templates.

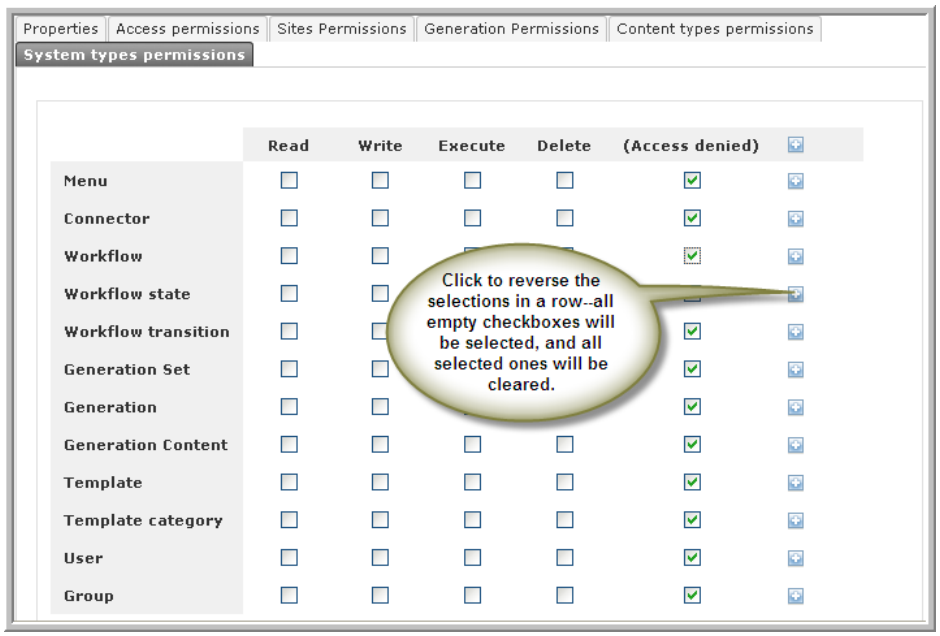
To configure group permissions for system classes, proceed as follows:

1. If you have just configured a group and have the **Group** window open, skip to Step 3. Otherwise, from the WCM menu bar, choose **System>Manage users and groups**. From the pane at left, select the name of the group whose permissions you wish to configure.

2. If necessary, click **Check-out** to open the group for editing.

3. Click the **System types permissions** tab to display the **System types permissions** page as shown below.

   System types permissions page



Tip

Clicking the plus icon in a row will toggle the selections for that row. Clicking the plus icon at the top of the icons column will toggle all selections for the page.

4. For each group, select permissions as follows:

   - **Read**, to allow the group to display menus and dialog boxes for the selected system class.
   - **Write**, to allow the group to modify and save configuration data for the selected system class.
   - **Execute**, to allow the group to execute objects in the system class.
   - **Delete**, to allow the group to delete the system class.

- **Access denied**, to prevent group members from accessing or modifying the selected system class.

Note

Be sure to clear the **Access denied** checkbox if you have selected one of the other permissions in a row.

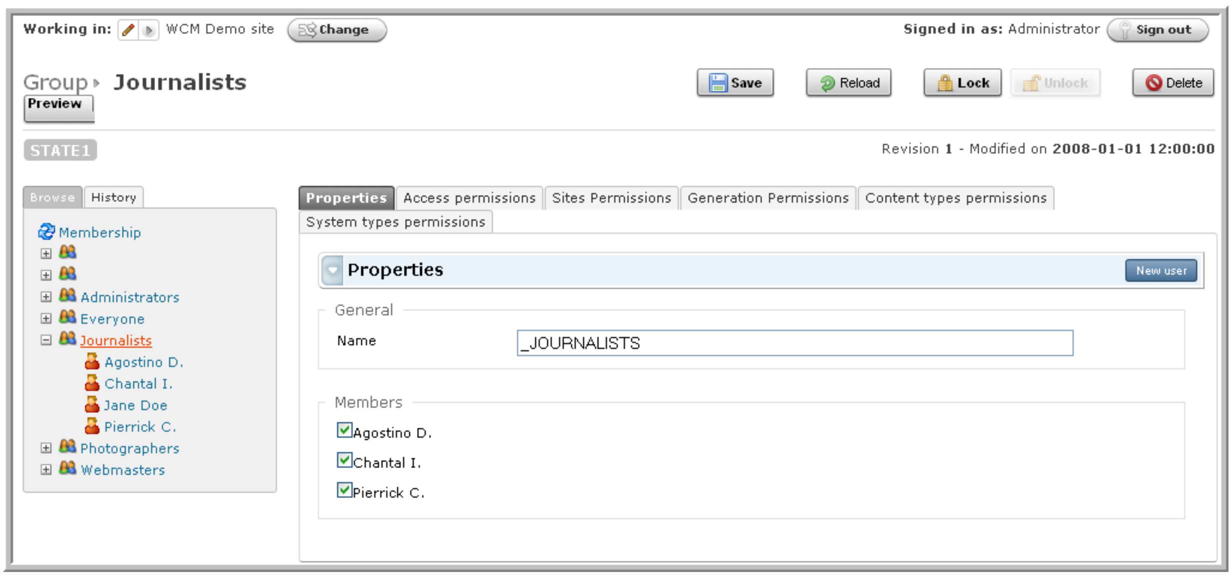
5. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

Display a group's users and permissions

To display a group's users and permissions, proceed as follows:

1. From the WCM menu bar, choose **System>Manage users and groups**.
2. In the left pane, under **Browse**, click a group to display the selected group's information, as shown below. Click the **Properties** tab to open the **Properties** page as shown below.

Properties page for a group



3. To display or change configured permissions for the group, click the Access permissions, Sites Permissions, Generation permissions, Content type permissions and System types permissions tabs, respectively.

Configure users and add them to groups

Note

You must have configured at least one group before you can configure users.

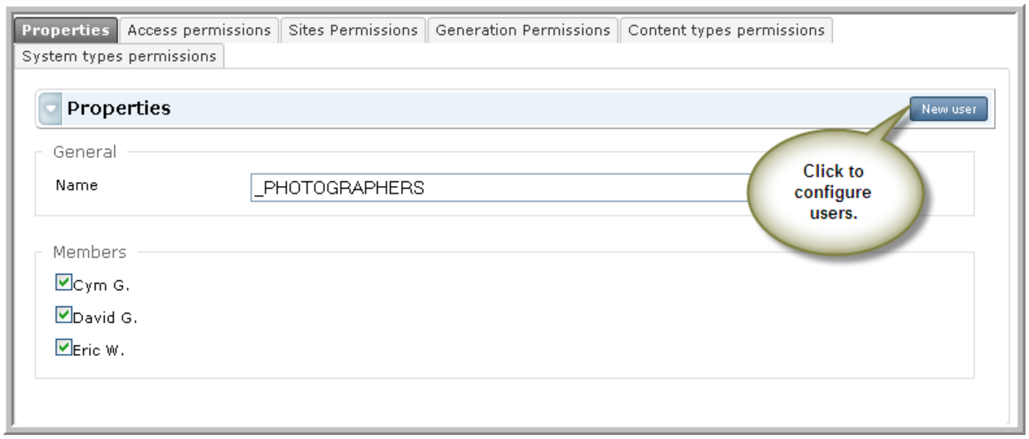
To configure users and add them to one or more groups, proceed as follows:

1. From the menu bar, choose **System>Manage groups and users** to open the **Group** window, and select a group.

2. If necessary, click **Check-out** to open the group information for editing.

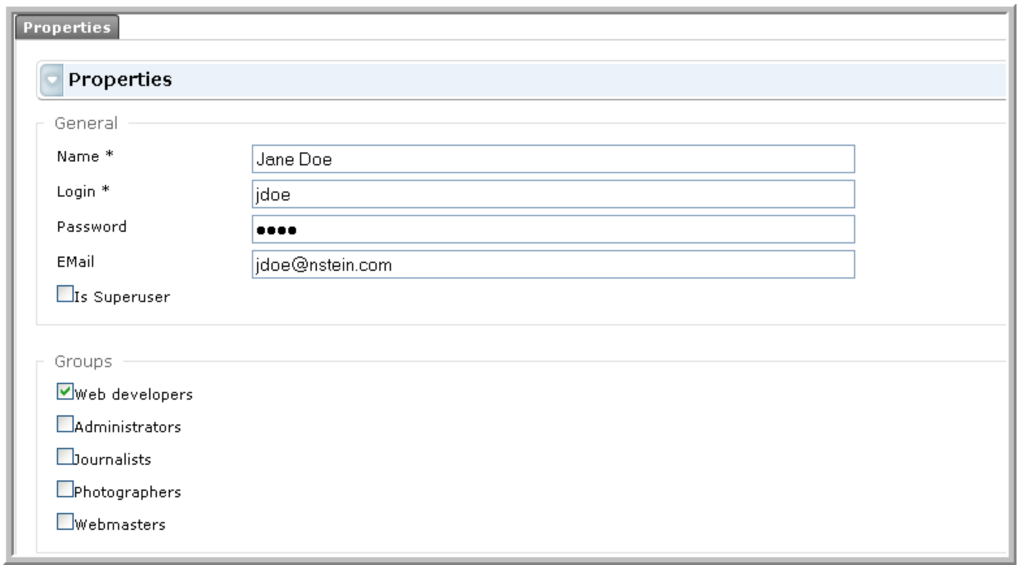
3. Select the **Properties** tab to display the **Properties** page as shown below.

New user button



4. Click **New user** to open the **User** window. The **Properties** page is displayed, as shown below.

User Properties page



5. Beside **Name**, enter the user's name.

6. Beside **Login**, enter a username that will be used for login.

7. Beside **Password**, enter a password for the user.

8. Beside **EMail**, enter the user's email address.

Tip

For Pessimistic lock mode users, the address you enter will be used to send a reminder to the user in the event that he or she forgets to check-in an object.

9. To give the user the ability to configure other users' permissions, select the **Is Superuser** checkbox.

10. Under **Groups**, select the groups to which the user belongs.

Tip

When associating users with groups, consider that the access permissions granted to a user are by default those of the most broad-ranging group to which the user belongs. For example, if you have already configured a user as belonging to a group that has read-write-delete permissions for photos, you will not alter the user's access permissions by subsequently adding them to a group with read-only access permissions for photos.

11. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your user configuration.

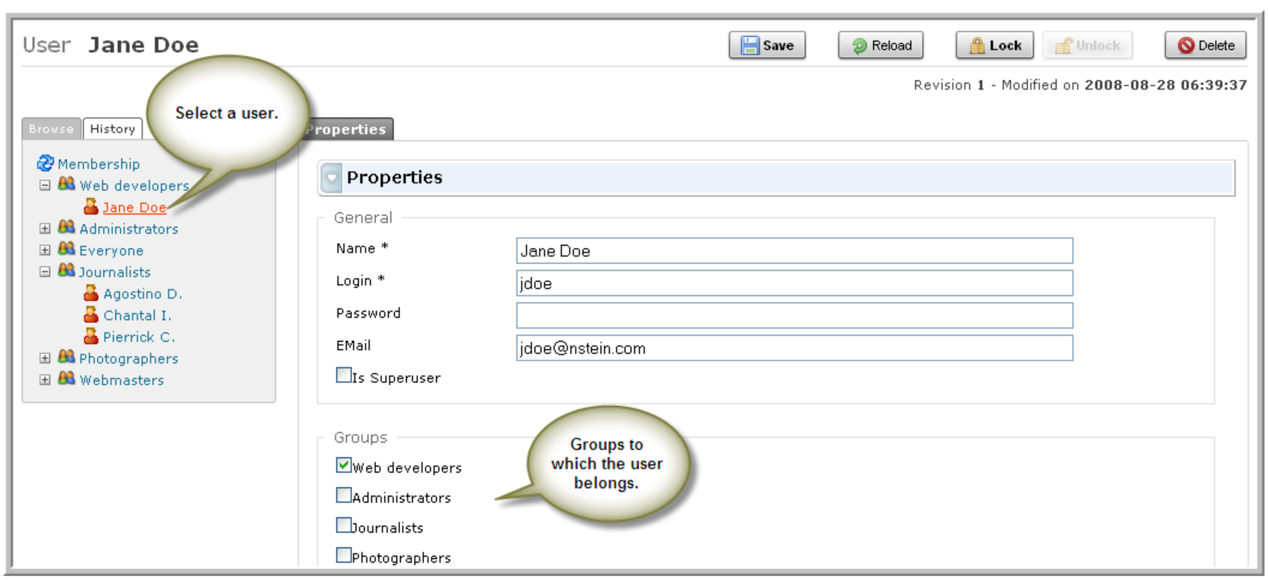
Display a user's groups

To display the configured groups for a user, proceed as follows:

1. From the WCM menu bar, choose **System>Manage users and groups**.

2. In the left pane, under **Browse**, expand the groups to locate the user, then click a username to display the selected user's information, as shown below.

User window



Note

The user's permissions are the permissions of the user's group. If the user belongs to more than one group, the permissions of the most broad-ranging group apply. For example, if a user belongs to a group with read-write-delete permissions for photos, and to another group with read-only access permissions for photos, the permissions of the former group are applied.

Add or remove groups for a user

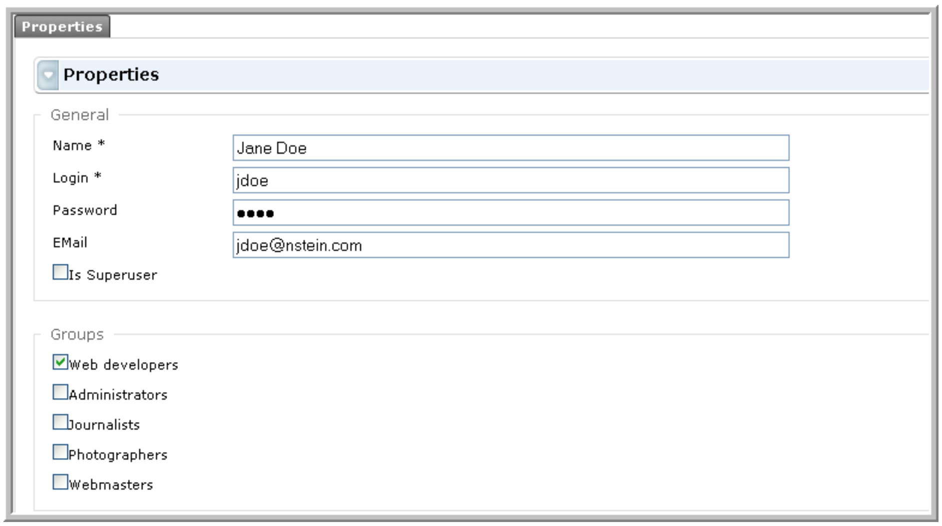
Note

This procedure applies to users and groups you have already configured. If you want to create a new group and add users to it, see the section called “Create a user group”

To add a user to a group, or to remove a user from a group, proceed as follows:

1. From the menu bar, choose **System>Manage users and groups**.
2. In the left pane, select a username to open the **User** window with the selected user's information.
3. If necessary, click **Check-out** to open the user information for editing.

   Removing a user from, or adding a user to, a group

4. Do one of the following:
   - To remove a user from a group, clear the checkbox beside the group.
   - To add a user to a group, select the checkbox beside the group.
5. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save the user information.

Delete a group

You may wish to delete a group if all its members have been associated with another group and the group has become redundant, or for other reasons.

Note

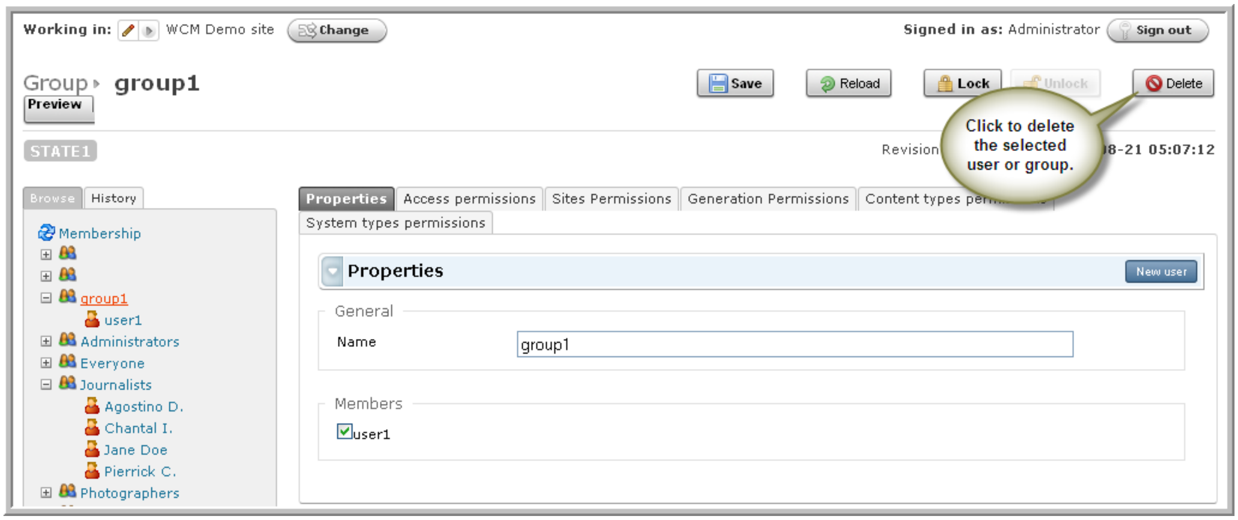
If a WCM user only belongs to one group, which is then deleted, the WCM user will still be preserved as a member of the Everyone group, which cannot be deleted.

To delete a group or a user, proceed as follows:

1. From the WCM menu bar, choose **System>Manage users and groups**.

2. In the left pane, under **Browse**, select the name of the group or user you wish to delete.

   Delete a group



3. Click the **Delete** button as shown above.

4. In the confirmation window, shown below, click **Yes**.

   Confirm delete

Delete a user

Caution

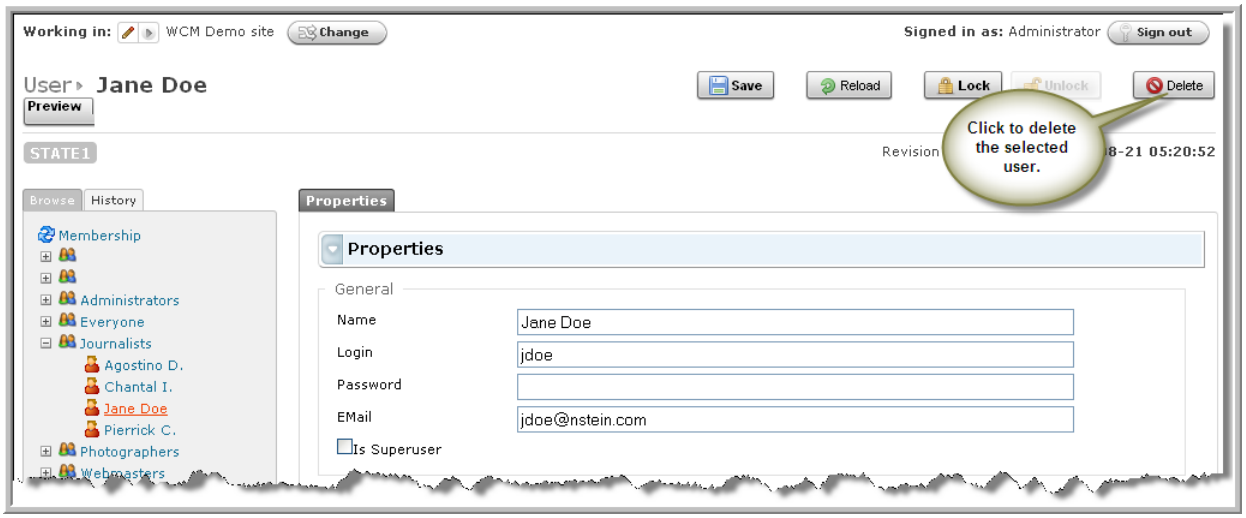
The procedure below removes a user from all groups and from the WCM database. If you really want only to remove a user from one or more groups, click here.

To delete a user, proceed as follows:

1. From the WCM menu bar, choose **System>Manage users and groups**.

2. In the left pane, under **Browse**, select the user name.

   Deleting a WCM user



3. Click the **Delete** button as shown above.

4. In the confirmation window, shown below, click **Yes**.

Confirm delete

Chapter 2. Manage WCM User Activities

This chapter provides WCM users with instructions to perform the following tasks:

1. Display logs of user actions in WCM.

2. Display (and optionally unlock) locked content objects.

Display logs of user actions

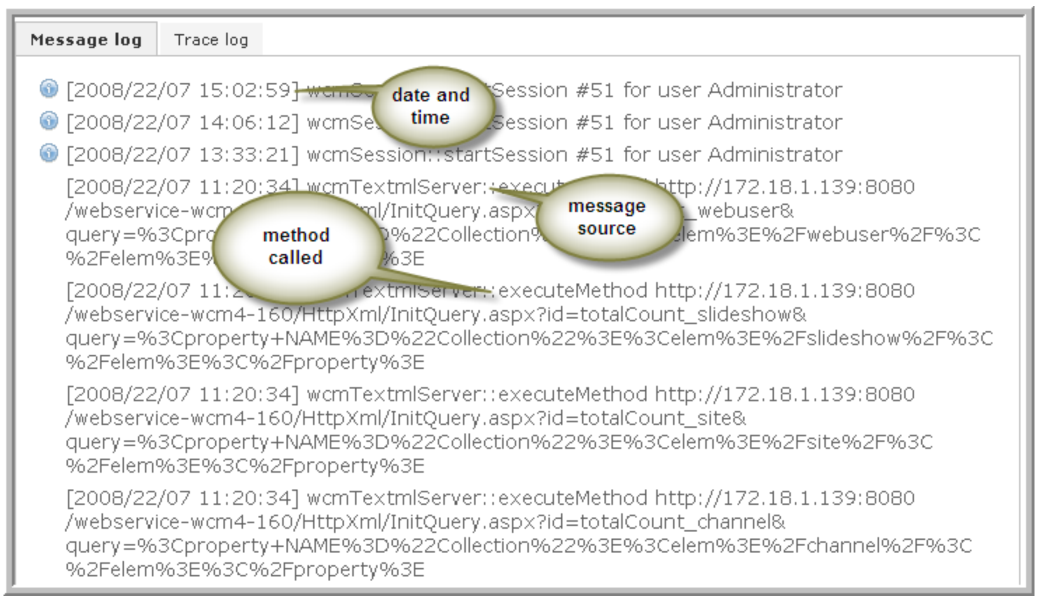
To display logs of user activities within WCM, proceed as follows:

1. From the menu bar, choose **System>Message log**.

2. To display the message log, click the **Message log** tab as shown below.

> The *message log* contains messages from the WCM's MySQL or TEXTML server regarding user actions. This log is used primarily by system administrators.

Message log



3. To display the trace log, click the **Trace log** tab, as shown below. To delete data in the log, select **Clear trace log**.

> The *trace log* contains messages from the TEXTML or MYSQL server regarding program execution. The trace log can be useful to developers for debugging purposes.

Trace log

Display all locked content or system objects

To display (and optionally unlock) all locked content, proceed as follows:

1. From the WCM menu bar, choose **System>Unlock content** to display all locked content, as shown below.

Lock management window

2. To unlock a content object, click **Unlock** in the **Action** column.

Part V. Software and Database Administration

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Chapter 1. Workflows

This chapter provides WCM users with instructions to perform the following tasks:

1. Understand WCM workflow function and vocabulary.

2. Create a workflow, as follows:

   - Define states for the workflow.

   - Configure a workflow and its state transitions.

3. Associate your workflow with the appropriate classes.

Tip

Polls can use the same workflow as all other content objects. However, if you want to be able to close a published poll so that Web users can not longer respond to it, but have it remain online, you must create a custom workflow that includes the "Closed for comments" state.

About workflows

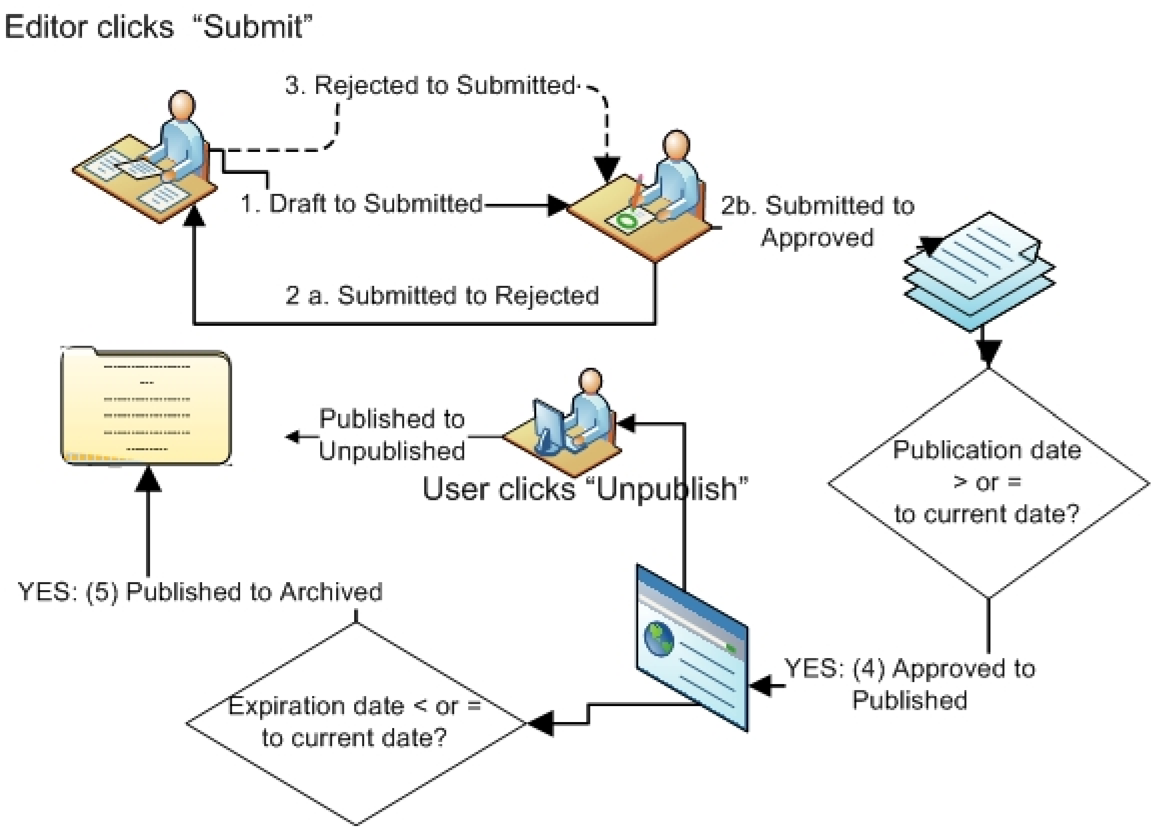
Workflows are WCM system objects that describe the "life cycle" of a content object in terms of state transitions. State transitions describe the conditions required for a content object to pass from one state to another within a workflow.

The out-of-the-box version of WCM 4.0 includes a "publication" workflow as illustrated in the flowchart below.

Note

Some Nstein clients may have workflows that are customized for their particular needs during implementation, so their workflow states may not match those in the flowchart below.

WCM workflows



Create a new workflow

WCM users can define their own workflows and/or states when required. For example, a WCM developer user planning to implement a publication in two languages at the request of an editor, might also create a scripted workflow to make content objects undergo a state transition from "approved" to "translated" when a translator clicks the submit button. In this case, permissions would dictate that only "translator" users have execute permissions for this particular state transition.

There are two to three steps to creating a new workflow, as follows:

1. Define states for your workflow;

   Note

   States must be defined first, in order to be available for selection in the workflow configuration dialog box.

2. Create a workflow script or modify an existing workflow script (if required);

   Note

   For more information on creating scripts, see the *WCM 4.0 Developer's Guide*.

3. Configure a workflow and its state transitions;

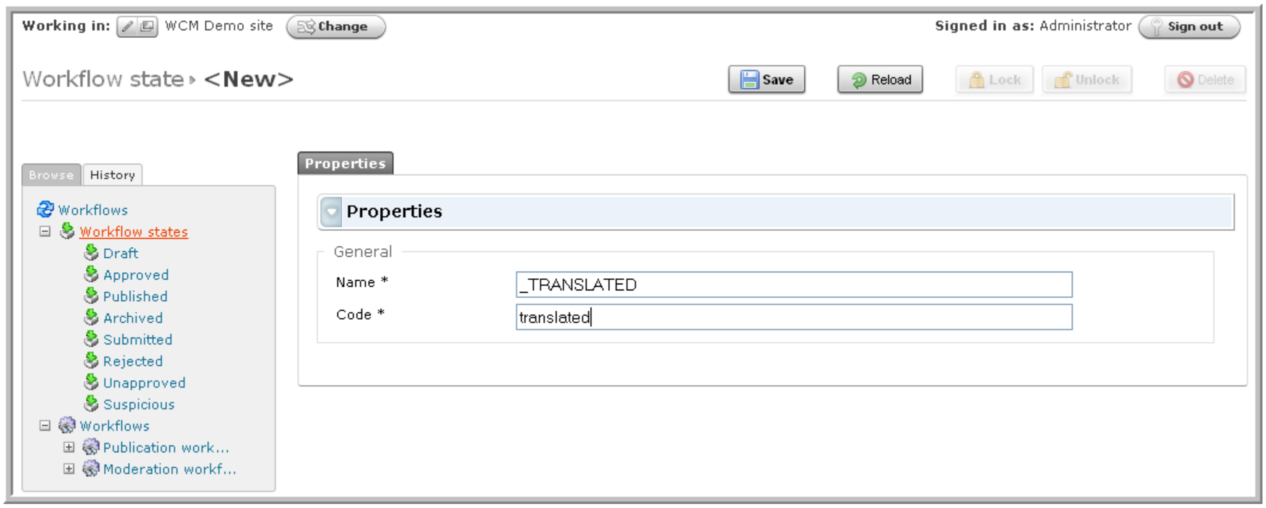
Define workflow states

To define one or more states for a workflow, proceed as follows:

1. From the WCM menu bar, choose **System>Configure workflows** to open the **Workflow** window.

2. Click **Workflow states** in the left pane to open the **Workflow state** window as shown below.

   Workflow state window



3. Beside **Name**, enter a name for the state, prefaced by an underscore as shown in the screenshot above.

   ### Note

   The underscore preface indicates to the WCM that the state is a resource. Once you have defined the new state in the WCM language file, the underscore will not appear in the WCM user interface.

   ### Tip

   The State name you enter will appear in the WCM user interface as a selectable button when the workflow state is in the state that represents the previous step. For example, a **Translated** button would appear in an article window when the article's current state was *submitted to translation services* (SubmittedTS).

4. Beside **Code**, enter a unique string to identify the state within WCM.

5. Click **Save** or **Check-in** to save your data.

6. Repeat from Step 2 to define additional states, if desired.

Configure a workflow and transitions

Caution

You can only associate one workflow with each content type. Therefore, if you only want to configure additional states and transitions for existing content types, choose

System>Configure workflows and then choose an existing workflow from those displayed. Proceed from Step 6 below.

Note

Before attempting this procedure, define the states required for your workflow and (optionally) create a script to extend the function of the workflow.

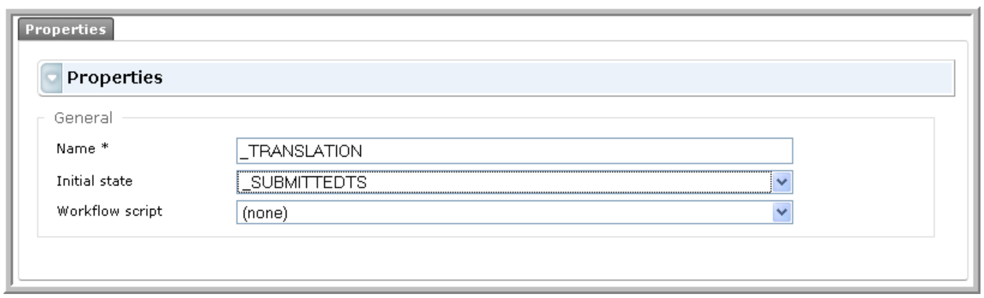
To configure a new workflow, proceed as follows:

1. From the WCM menu bar, choose **System>Configure workflows** to open the **Workflow** window. The **Properties** page for a workflow is displayed.

   ## Tip

   If you are already in the **Workflow <New>** window having just defined a state, click **Workflows** in the left pane to open the **Workflow** page.

   Properties page for a workflow

2. Beside **Name**, enter a name for the workflow, prefaced by an underscore as shown in the screenshot above.

   ## Tip

   The underscore preface indicates to WCM that the workflow is a resource. Once you have defined the new workflow in the WCM language file, the underscore will not appear in the WCM user interface.

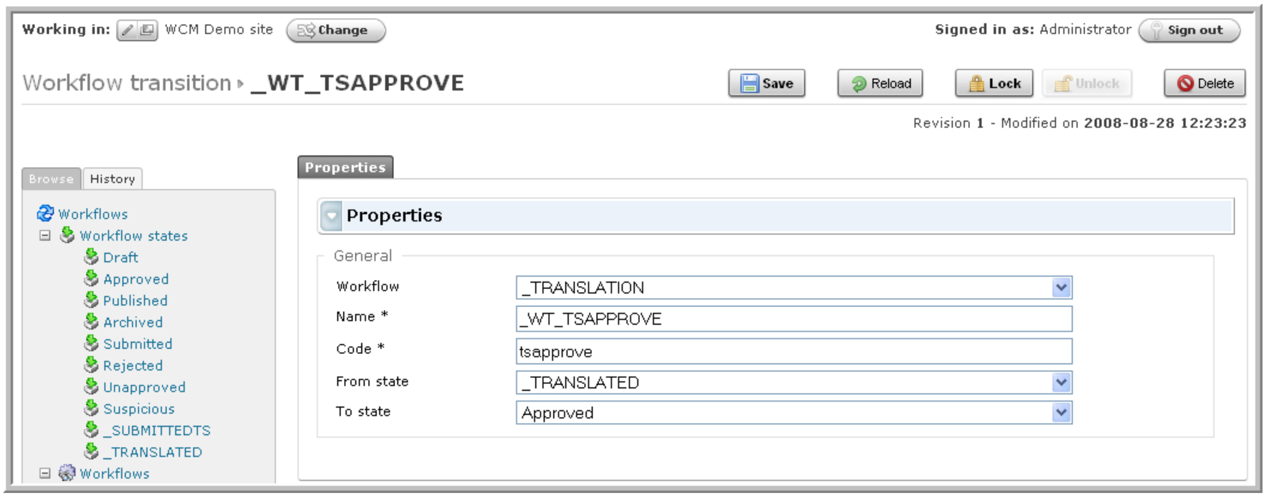
3. Beside **Initial state**, select an initial state for the workflow.

4. If workflow scripts have been defined by a developer, select the appropriate script beside **Workflow script**. If no scripts were developed, leave this field in its default value, **(none)**.

5. Click **Save** or **Check-in**, depending on your lock mode.

6. Click the **New transition** button to open the **Workflow transition** window as shown below.

   Workflow transition window



7. Beside **Workflow**, select the name of the workflow.

8. Beside **Name**, enter a name for the transition, using the preface `_WT_`.

Tip

The `_WT_` preface is how the full name of the resource is used in the code.

9. Beside **Code**, enter the string that will identify the transition in the code.

10. Beside **From state**, choose the first state in the transition.

11. Beside **To state**, choose the second state in the transition.

12. Click the **Workflows** refresh button at the top of the left pane to display your new transition in the Workflows tree.

13. Click **Save** or **Check-in**, depending on your lock mode, to save your workflow and transition.

Associate your workflow with classes

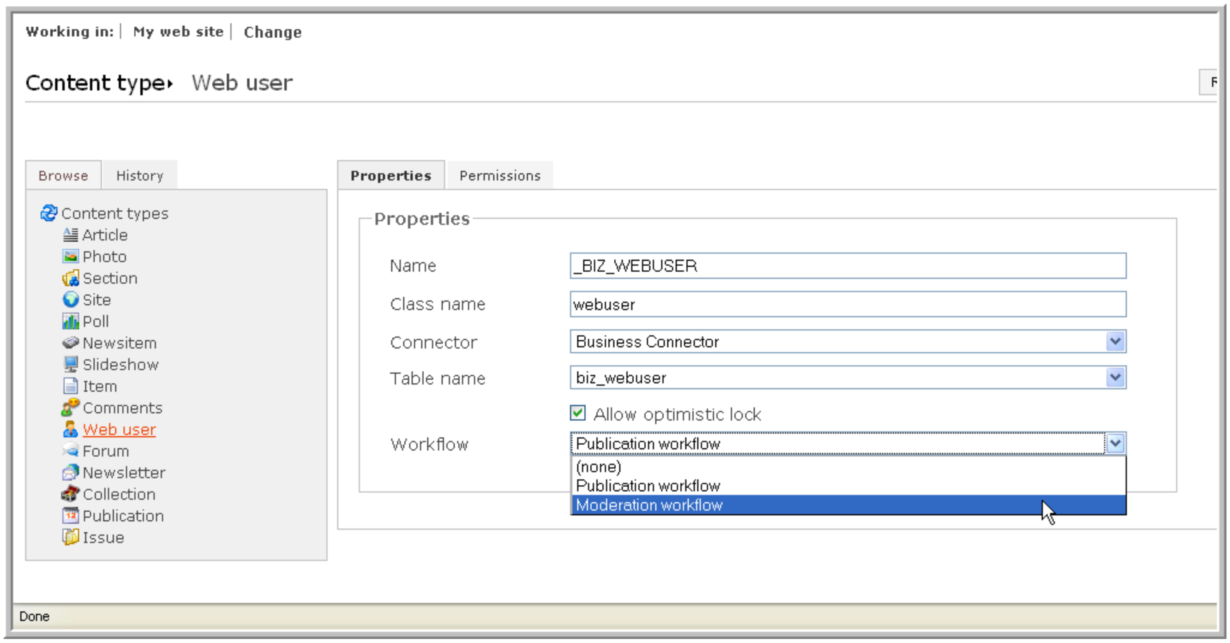
As a final step in the workflow creation process, you must associate your workflow with the system and content types it uses. (For example, the Moderation workflow uses objects in the Webuser content type.) To do so, proceed as follows:

1. From the WCM menu bar, choose **System>Manage system types** or **System>Manage content types** depending on whether you want to associate a system class or a content type, respectively.

2. Select the system or content type you want to associate with the new workflow.

3. Beside **Workflow**, select the workflow as shown below.

   Associating a workflow with a content type



4. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your changes.

5. Repeat from Step 1 to associate additional classes with your workflow, if required.

Chapter 2. Import

The WCM *import* function allows users to make content that was not configured through WCM accessible to users of the WCM application. The import function converts content from its original format to a WCM-compatible format, and moves it to WCM's system folders.

This chapter provides WCM users with instructions to perform the following tasks:

1. Import and transform NewsML or NITF format content objects.
2. Import XML format content objects.
3. Import JPG photos with embedded metadata.
4. Import assets from DAM

Note

The above-mentioned procedures below are batch operations; that is, all files within the specified folder are imported in each operation.

Import NewsML or NITF format content

NewsML (also known as NewsML-G2) is an XML specification published by the International Press Telecommunications Council (IPTC) in 2008, in order to provide modular construction and embedded metadata. NewsML acts as an envelope and organizer that allows news agencies to bundle related multimedia news items — text, photos, video or anything else — into compact packages than can be automatically processed by web sites or newsroom systems. The content and relationships of the individual news items can be described using a rich set of metadata.

News Industry Text Format (*NITF*) is an XML specification published by the IPTC to standardize the content and structure of text news articles. The format is widely used across the news industry. NITF complements NewsML.

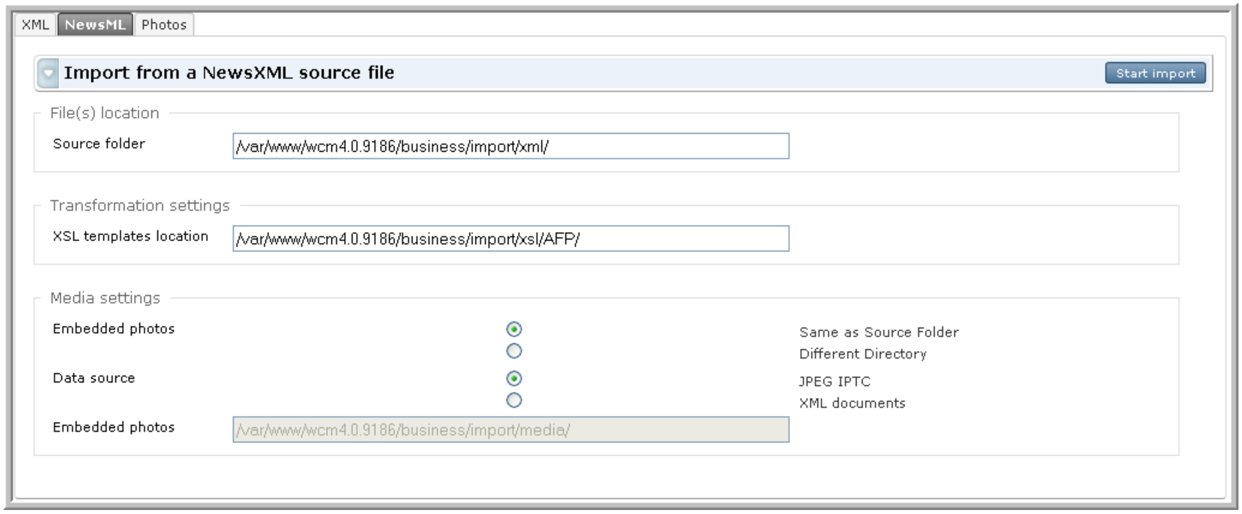
Important

Before attempting this procedure, create an articles directory for each section in your Web publication. For example, if your Web site contains six sections--**Home, World news, Sports, Business, Entertainment**, and **Travel**--you would create six folders, using the section names. Place these folders containing your articles and images in the `//business/import/in` directory.

To import files in NewsML or NITF format, proceed as follows:

1. From the WCM menu bar, choose **Import>Import from files**.
2. Click the **NewsML** tab, as applicable, to open the associated page as shown below.

   Import NewsML format files



3. Beside **Source folder**, enter the path and the folder that contains the XML format articles to be imported.

Tip

The default import path defined in the WCM `configuration.xml` file is the one displayed: `/business/import/xml`.

Caution

The `configuration.xml` file is located in: `[root]/xml/configuration.xml`. Other `configuration.xml` files should not be consulted or modified unless absolutely required by a system administrator.

4. Beside **XSL templates location**, enter the path to the extensible stylesheet language (XSL) files that will be used to transform the articles and images.

5. Beside **Embedded photos**, select one of the following:

   - **Same as source folder**, if the photos are stored in the same directory as the other source files. Skip to Step 7.

   - **Different directory**, if the photos are stored in another directory.

6. Beside **Embedded photos**, enter the path to photos associated with the imported articles.

7. Beside **Data Source**, select the source format for photo metadata, (such as captions) as follows:

   - **JPEG IPTC**, for metadata embedded in JPG format photos.

   - **XML Documents**, for XML format metadata.

Tip

No destination path is required for the transformed articles, because they are stored in the database, not in the file system.

8. Click **Start import**. After import, the transformed files and photos are accessible through the WCM browse or search functions.

Import XML format content

XML is WCM's native format for content objects. The import XML function is useful for WCM users who have created XML format content outside of WCM, and who wish to move this content to the WCM database.

Important

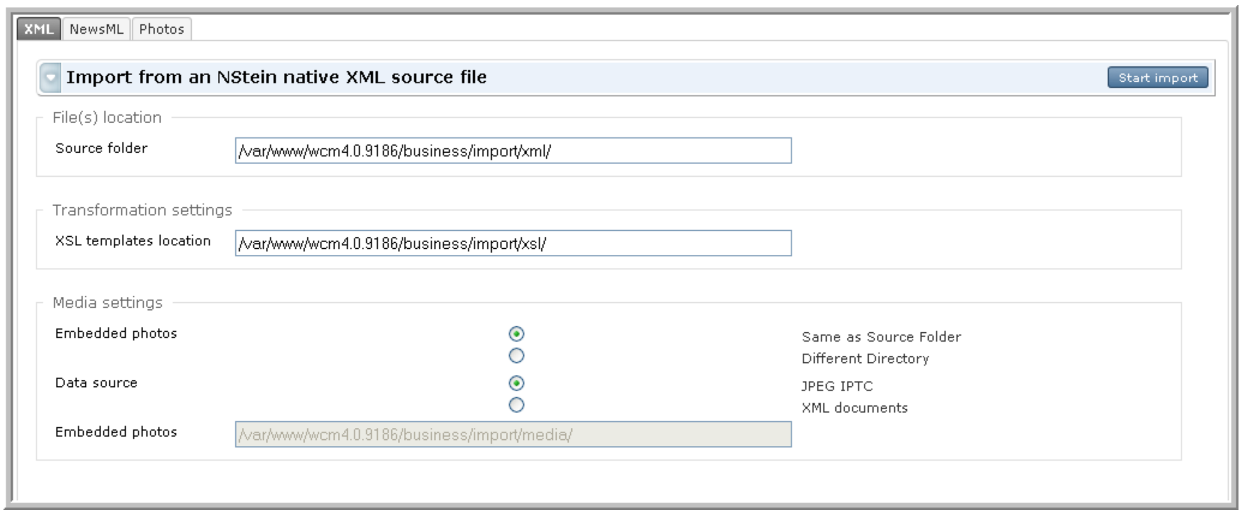
Before attempting this procedure, place the XML files to be imported in the `[wcm root]//business/import/xml` directory.

To import XML content, proceed as follows:

1. From the WCM menu bar, choose **Import>Import from Files**.

2. Click **XML** to open the XML page as shown below.

   Import XML format files

3. Beside **Source folder**, enter the name of the folder that contains the XML format articles to be imported.

4. Beside **Embedded photos** enter the path to photos associated with the imported articles.

5. Beside **Data Source**, select the source format for metadata as follows:

   - **JPEG IPTC**, for metadata embedded in JPG format photos.
   - **XML Documents**, for XML format metadata.

   ## Tip

   No destination path is required for the transformed articles, because they are stored in the database, not in the file system.

6. Click **Start import**. After import, the transformed files and photos are accessible through the WCM browse or search functions.

Import JPG photos containing embedded metadata

The import photos function is used to import multiple JPG photos that include embedded metadata in one operation.

> Adobe Extensible Metadata Platform (*XMP*) is a standard for processing and storing standardized and proprietary metadata, created by Adobe Systems Inc. Thus, one can use a product such as Adobe Bridge to add keywords and other tags to photos, which are then saved, along with their embedded metadata, as JPG files.

Important

Before attempting this procedure, place all the photos you wish to import in the `[wcm root]/business/import/in/photos/` folder.

To import photos, proceed as follows:

1. From the WCM menu bar, choose **Import>Import from Files**.
2. Click **Photos** to open the **Photos** page as shown below.

   Import photos

3. Beside **Source folder**, enter the path to the photos.
4. Click **Start import**. The photos will be imported and placed in the WCM system folder for photos (`img/photos/biz`) with all other WCM photos.

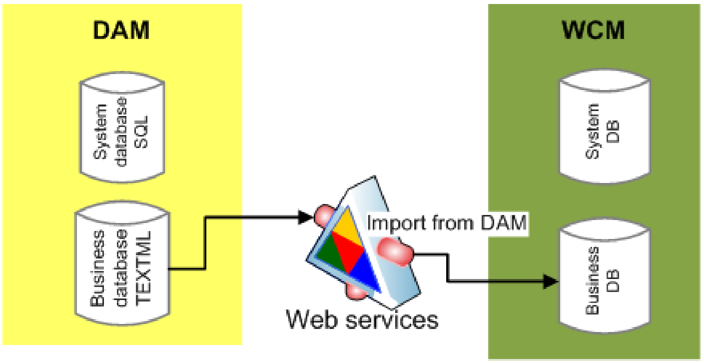
Import assets from DAM

WCM users who also have the Nstein Digital Asset Management (DAM) application can import selected assets from DAM, where they are then accessible to all WCM users.

> The DAM and WCM use Web services to exchange assets over the Internet.
>
> *Web services* are software systems designed to support machine-to-machine interaction over a network. The clients and servers involved in Web services communicate using simple object access protocol (SOAP) XML messages.

The figure below shows how assets can be imported from the DAM business database to the WCM business database.

Import from DAM



Note

The correct Web services and WCM configuration file settings are important preparation considerations for a successful import. Check the `configuration.xml` file and note the information within the `<dam>` tag under the `<webServices>` and `<textml>`.

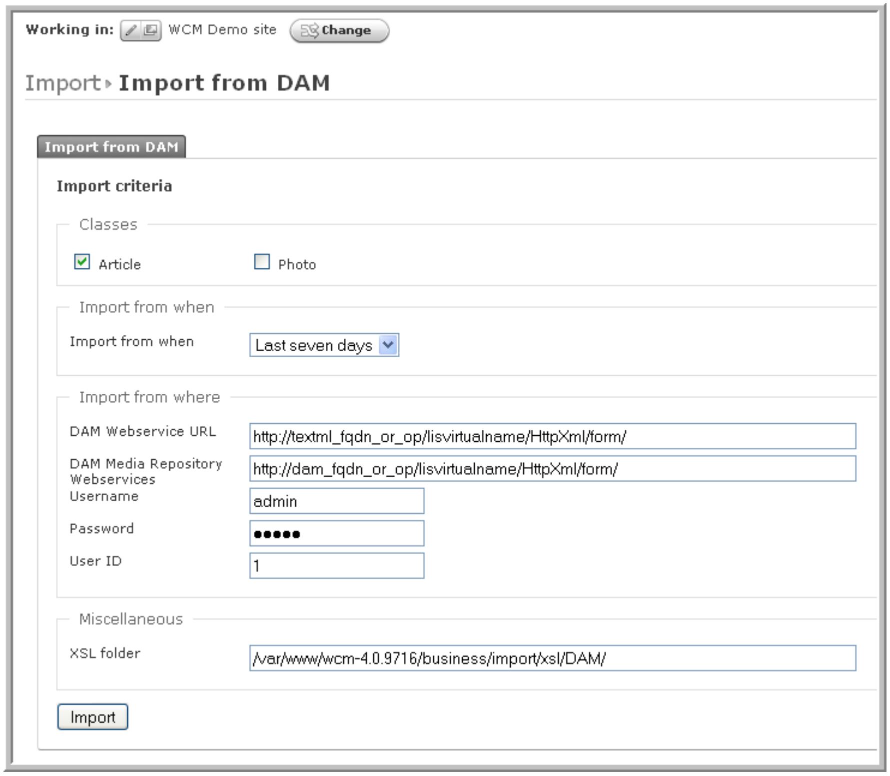
Caution

The `configuration.xml` file is located in the: `[root]/xml/configuration.xml`. Other `configuration.xml` files should not be consulted or modified unless absolutely required by a system administrator.

To import article and photo assets from DAM, proceed as follows:

1. From the WCM menu bar, choose **Import>Import from DAM** to open the **Import from DAM** window as shown below.

   Import from DAM window



2. Under **Classes**, select the type of content to be imported--**Article**, **Photo**, or both.

3. Beside **Import from When**, select the publication dates for the assets to be imported. For example, select **Last seven days** to import assets whose **Publication date** is a date in the past 7 calendar days.

4. Beside **DAM Webservice URL**, enter the URL of the DAM web services. This information is defined in the configuration.xml file inside the `<webServices>` tag description.

Caution

The `configuration.xml` file is located in: `[root]/xml/configuration.xml`. Other `configuration.xml` files should not be consulted or modified unless absolutely required by a system administrator.

5. Beside **DAM Webservices Media repository**, enter the URL of the DAM web services media repository.

6. Beside **Username**, enter your WCM user name.

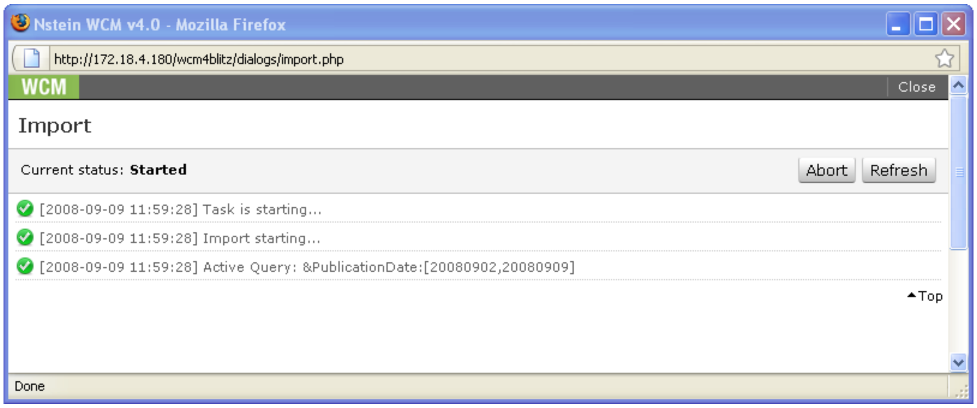
7. Beside **Password**, enter your password.

8. Beside **UserID**, enter your user ID.

9. Beside **XSL folder**, enter the full path to the XSL folder.

10. Click **Import**.

    Import progress window


Nstein WCM v4.0 - Mozilla Firefox
http://172.18.4.180/wcm4blitz/dialogs/import.php
WCM
Close
Import
Current status: Started
Abort
Refresh
[2008-09-09 11:59:28] Task is starting...
[2008-09-09 11:59:28] Import starting...
[2008-09-09 11:59:28] Active Query: &PublicationDate:[20080902,20080909]
Top
Done

Chapter 3. Database Maintenance

Note

The tasks below are reserved for WCM users with access permissions to these functions (such as "Managing editor" group or "System administrator" group).

This chapter provides WCM users with instructions to perform the following tasks:

1. Clean up expired content.
2. Re-index content.
3. Update TME metadata for all content.
4. Manage database connectors as follows:
   - Understand WCM databases and the role of connectors.
   - Configure a connector.
   - Modify connector configuration.

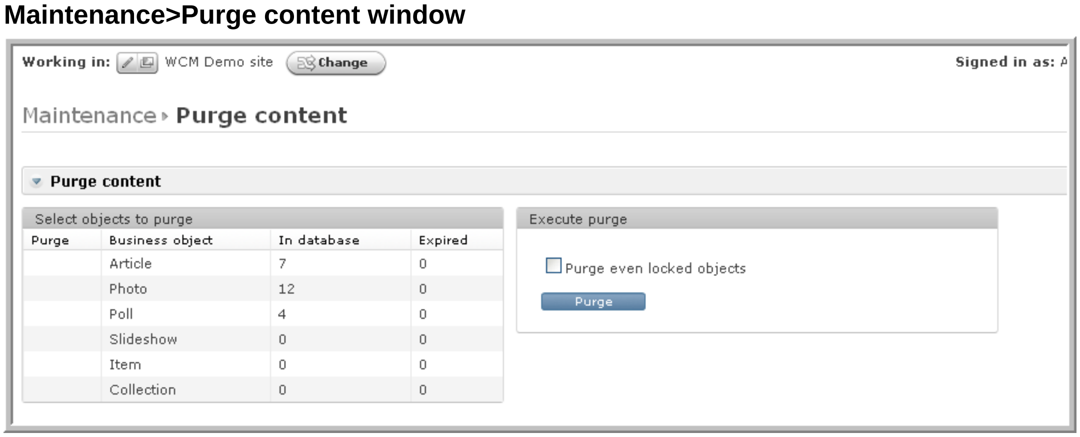
Clean up expired content

It is good practice to clean up expired content on your publication's database at regular intervals. For those familiar with the MS Windows operating system, the operation below is similar to that launched when you choose **Accessories>System Tools>Cleanup** in Windows, with the important exception that this action purges expired content across all your Web publication's sites.

To clean up expired content, proceed as follows:

1. Log in to WCM.
2. Choose **System>Purge content** from the menu bar at the top of any window to open the **Maintenance>Purge content** window shown below.

   Maintenance>Purge content window



3. Observe the **Expired** column of the table.

- If there are no numbers above 0 in the **Expired** column, no maintenance is required and you can skip the remaining steps.
- If there are numbers above 0 in the **Expired** column, proceed as described in the steps that follow.

4. (Optional) To purge even locked content, select the **Purge even locked objects** checkbox.

5. Click **Purge** to clean up the database.

Re-index content

> *Re-indexing content* allows you to synchronize the search engine with the current content. For example, if you have recently added an article on the prevalence of cell phone use by adolescents to your Web publication, re-indexing the content would allow users to locate your new article when they enter the string "cell phones" in their search.

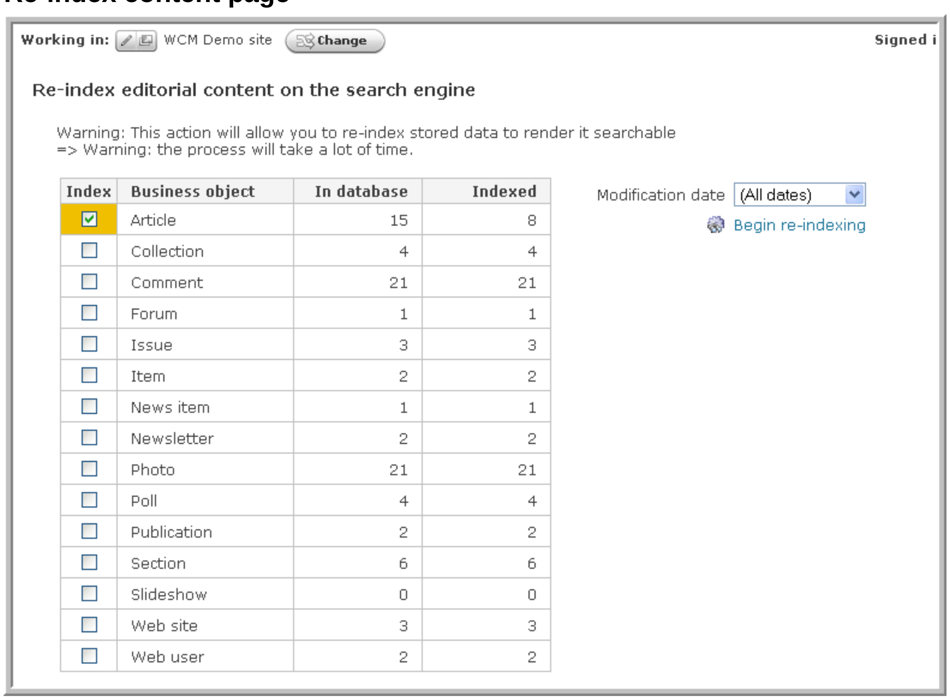
Re-index content as a preparatory step to publishing your Web publication, so that the search engine can function optimally.

To re-index content, proceed as follows:

1. Log in to WCM.

2. Choose **System>Re-index content** from the menu bar at the top of any window to open the re-index content window shown below. The goal of this exercise is to update the **Indexed** data so that it matches the **In database** data.

Re-index content page



Index	Business object	In database	Indexed
☑	Article	15	8
☐	Collection	4	4
☐	Comment	21	21
☐	Forum	1	1
☐	Issue	3	3
☐	Item	2	2
☐	News item	1	1
☐	Newsletter	2	2
☐	Photo	21	21
☐	Poll	4	4
☐	Publication	2	2
☐	Section	6	6
☐	Slideshow	0	0
☐	Web site	3	3
☐	Web user	2	2

Note

- **Business object** lists the various content types.
- **In database** represents the number of content objects in the master database
- **Indexed** represents the number of indexed content objects.

3. Select the content types whose tags you wish to update and click **Begin re-indexing**.

Re-generate metadata for WCM content

Use this procedure to correct corrupted data or to generate metadata for a large body of brand new WCM content.

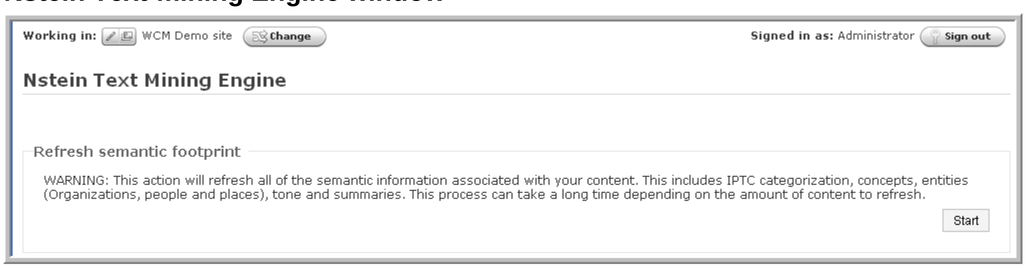
Caution

This operation will re-generate metadata for all your WCM content. All previously-generated metadata for applicable content (that is, articles, news items, photos, slideshows and collections) will be overwritten. Exercise caution before undertaking this procedure because you will lose manually-configured tags as well as existing TME-generated tags.

To generate metadata for WCM content, proceed as follows:

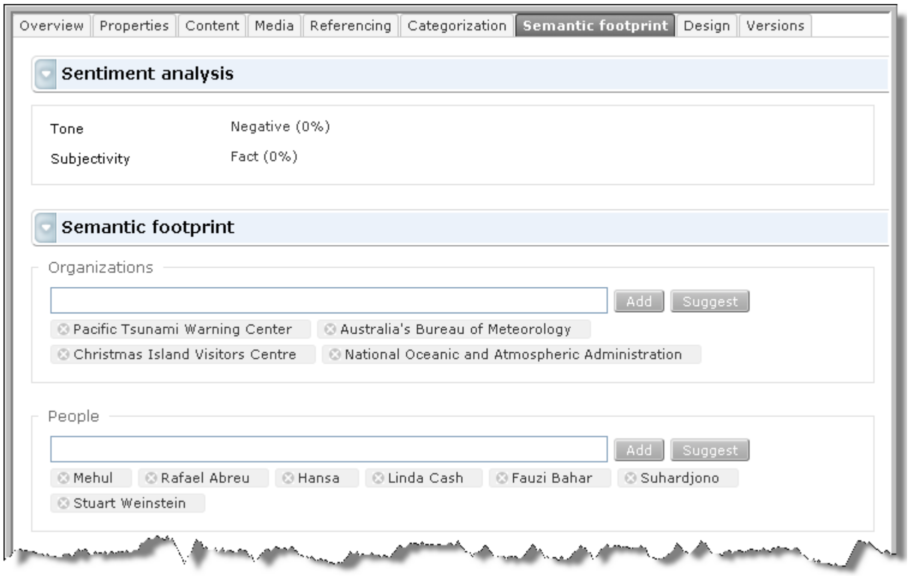
1. Log in to WCM.
2. From the WCM menu bar, choose **System>Nstein Text-mining Engine** to open the text-mining window shown below.

Nstein Text-mining Engine window



3. Click the **Start** button. The TME will perform text-mining on all WCM content. When the process is complete, the **Nstein Text Mining Engine** window will display the status of the operation.
4. To view the data generated for an individual content object, perform a search to locate the content object, open it and click the **Semantic footprint** tab as shown below.

TME data for an article



Manage connectors

About WCM connectors and databases

WCM software is installed on a server and data is stored in a MySQL database. WCM users access the application from PC workstations equipped with browsers on the network. WCM connectors and databases are described below.

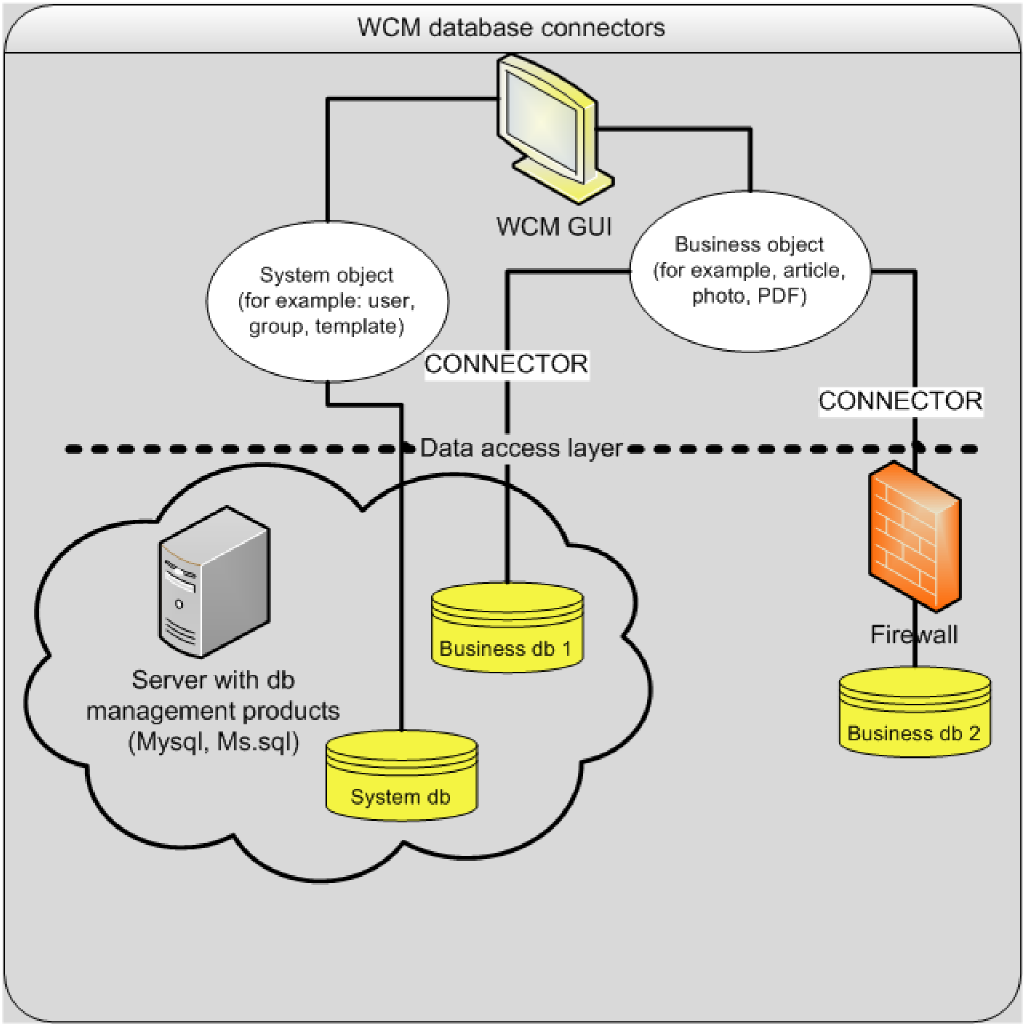
A *connector* is a database driver used to exchange data between the user interface and your business database. The connector functions on the level of the data access layer (DAL).

System objects such as users, groups and templates use a single database and built-in connectors.

WCM content objects such as articles and Webusers (that is, readers) can be stored in a single database or across a few databases.

WCM is preconfigured with one database connector (the connector to Business db1 in the figure below).The figure below illustrates how a database administrator might set up a second database ("Business db2") to isolate UGC such as blogs, poll responses, and user comments.

WCM databases and connectors



Create and configure a connector

Note

WCM connectors are configured only for content objects, not for system objects.

Database administrators may wish to configure a new connector in the following circumstances:

- You have added a new database to your network;
- You have created new content types that require a new connector.

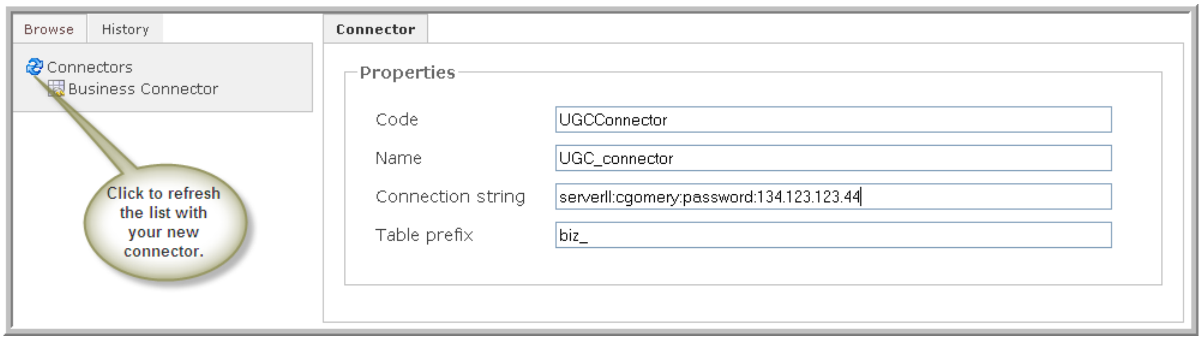
Note

Please read before attempting this procedure.

To configure a connector, proceed as follows:

1. From the WCM menu bar, choose **System>Configure data sources** to open the **Connector** dialog box shown below.

Connector dialog box



2. Beside **Code**, enter a string that will serve as the connector ID in the system.

3. Beside **Name**, enter a descriptive name for the connector.

4. Beside **Connection string**, enter a connection string to create a data source name. This information is used to connect using PHP extension and application repository data source name (PEAR DSN) syntax. The format of the supplied DSN must be as follows:

   `phptype://username:password@hostname[:port]/database_name`

   ### Tip

   For a MySQL database, you would enter (for example):

   `mysql://jdoe:jdoe198@wcmserver/bizdb2`.

5. Beside **Table prefix**, enter the prefix used in your properties table.

   ### Tip

   Each content type has its own properties table in the database. A *table prefix* is a string that precedes each table name in your database to prevent conflicts between table names and reserved words. The default code used by WCM is `biz_`.

6. When you are done, select **Save** or **Check-in** (according to your selected lock mode) to save your connector configuration.

7. To configure additional connectors, proceed from step 1 above.

Modify configuration of an existing connector

Note

Please read before attempting this procedure.

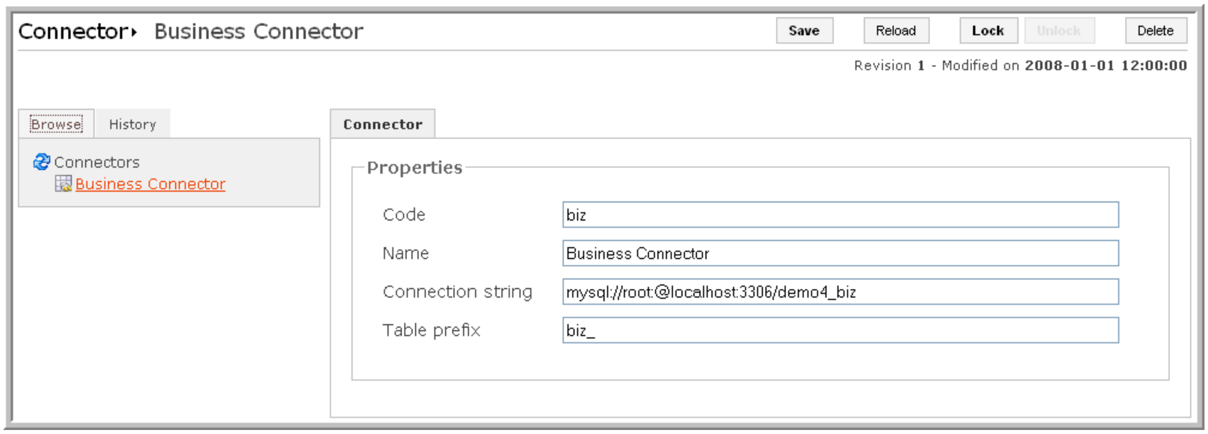
WCM database administrators may wish to re-configure an existing connector after (for example) re-locating an existing database.

To modify the configuration of a connector, proceed as follows:

1. From the WCM menu bar, choose **System>Configure Data Sources**.

2. Select the connector you wish to modify from the **Connectors** list in the left pane as shown below.

Modify a connector



3. If necessary, click **Check-out** to open the connector configuration for editing.

4. Change any of the following parameters as required:

   - Beside **Code**, enter a new string that will serve as the connector ID in the system.
   - Beside **Name**, enter a descriptive name for the connector for display to WCM users.
   - Beside **Connection string**, enter a new database path. The path fields and syntax are as follows:

     `phptype://username:password@hostname[:port]/database_name`

   - Beside **Table prefix**, enter the prefix that will be used in your database tables.

5. Click **Save** or **Check-in** to save your modified connector configuration.