

Dialogue™

Reference Guide

to

Dialogue Content Manager



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Chapter 1: Introduction

1.1 Reference Guides, Hyperlinks, and Help

About this Guide

Congratulations on the purchase of Dialogue, the software that gives you virtually unlimited capability to build customized, on-demand communications for any media!

This Guide provides information on using Dialogue. The latest set of books including this book, Reference Guide to Dialogue Content Manager can be found on our website.

The filename of this book is Manager.pdf.

Reference Guides

Using the Reference Guides as a Set

The *Reference Guides* should be used as a set of volumes much like an encyclopedia. The information is divided into categories that define a feature, process, or module, but the information in each *Guide* is intertwined with other *Guides*. This set contains all the books needed to learn Dialogue with explanations of the interface and how to use the many options available.

IMPORTANT NOTE: For basic information about using **Pages**, **Documents**, and **Applications**, see [Reference Guide to Basic Document Composition](#).

For basic information about **Dialogue Designer**, see [Reference Guide to Dialogue Designer](#).

Hyperlinks

This set of the documentation contains **hyperlinks** and is fully **searchable** in PDF. See the instructions for using the search capability in the Readmecatalog.txt file available in your C:\Program Files\Exstream\Reference Guides directory, or on our website.

Terminology

If you encounter a term you do not understand, a [glossary](#) is included in this set of books. It includes both general computer terms and terminology specific to Dialogue.

The files should already exist in the proper directory for full-installation versions of Dialogue 3.0 and later. If you have an earlier version of Dialogue, please note that you should keep your on-line copies together in one folder on your computer so that you can refer back and forth easily. The required folder for the *Reference Guides* is C:\Program Files\Exstream\Reference Guides. You can create this folder if it does not exist on your system. It **must** be named exactly as shown for your Windows workstation, in order to have full accessibility to the help and search functions.

Downloading the Reference Guides

The complete set of *Reference Guides* can also be found in PDF format on our website. Each version of the documentation is zipped together in a set in a file called **GuideCat.zip**.

1. Go to our website: <http://www.exstream.com/>.
2. You will see a navigation bar under our banner.
3. Click **Service & Support**.
4. Slide down and click **Support** just below the navigation bar.
5. Type your **Login** username.
6. Type your **Password**.
7. Click **Submit Login**.

You will be taken to the **Online Support Center** where you can click on one of the options to:

- ◆ Read the **Support Procedures**
- ◆ **Download** software files
- ◆ **Download Documentation > Guides > GuideCat.zip**
- ◆ Enter **Resolve**
- ◆ Enter **eXchange**.

See the instructions that follow for zipped files from our website.

IMPORTANT NOTE: Files on our website are zipped using a password. Any zipped files can be unzipped using WinZip.exe. This software is shareware and can be found at <http://www.winzip.com/>.

Contact your Dialogue Support Representative for the password for the version and platform you need.

Help

These *Guides* are linked to the **Help Menu** in the Dialogue program.

Content Manager

When in Dialogue Content Manager, click **Help** on the **Menu Bar**. The following choices appear:

Help Menu in Content Manager



1. **Content Manager Help** offers context-sensitive help about features and takes you to the nearest destination for relevant information.
2. **Using Content Manager** offers information about general features in Content Manager.
3. The **Dialogue Glossary** offers definitions for terms with which you may not be familiar.

Introduction

4. **Explain Messages** takes you to the **Message Dictionary** where you can find information about error messages you receive in the program.
5. **About Content Manager** gives you information about the version of Dialogue you are using.

Designer

The same features are active in Dialogue Designer.

Help Menu in Designer



How to Contact Support

If, after reading this Guide, you have additional questions about using Dialogue, contact Exstream Support by email at <mailto:support@exstream.com>. If you are experiencing difficulty, include a detailed description of the problem, including any system messages.

1.2 Major Topics Covered in this Guide

- ◆ [Feature Overview](#)
- ◆ [Function Overview](#)
- ◆ [Basic Object Function](#)
- ◆ [Using the Dialogue Content Manager Interface](#)
- ◆ [Objects and Object Properties](#)
- ◆ [Rules on Objects](#)
- ◆ [Versions, Approval, and Object History](#)
- ◆ [Multiple Languages](#)
- ◆ [Trace/Watch/Debug](#)

Chapter 2: Feature Overview

This chapter outlines the features of Dialogue and explains the modules and applications that comprise the Dialogue suite of programs.

2.1 Dialogue is the Integrated Solution for all Your Business Communications

Exstream's award-winning **Dialogue** is a revolutionary solution that combines personalized document creation, campaign management & tracking, and multi-channel delivery in one easy-to-use **software suite**.

One Tool for Multiple Applications

Dialogue creates the full spectrum of business communications delivered electronically and in print:

- ◆ Complex high volume statements
- ◆ eFulfillment on the Web
- ◆ On-demand eService
- ◆ Newsletters and catalogs
- ◆ Personalized brochures
- ◆ One-to-one direct mail
- ◆ Advertisements and coupons
- ◆ Investment portfolio reports
- ◆ Prospectuses
- ◆ Business letters & notices
- ◆ Insurance policies and explanations of benefits
- ◆ Contracts and legal documents
- ◆ Kiosk applications

General Features

Dialogue provides the following general features:

- ◆ Centralized design and management of personalized and **targeted messages**.
- ◆ Centralized design, management, and tracking of marketing **campaigns**.
- ◆ Design workflow **control, security, and multiple-language processing**.
- ◆ Transaction-based customer **analysis** tools for delivery on the Internet or via print.
- ◆ Easy-to-use **document** design and high-volume composition system.
- ◆ **Advanced** document design and print/mail management tools to enable sophisticated business documents, such as personalized statements, driven by multiple, complex printing and mailing environments with output to any media.

2.2 Dialogue is Modular and Organized in Suites

Dialogue Adapts to the Size and Needs of your Organization

Dialogue is a *modular suite* that can be used in a relatively small environment, allowing you to implement for a single application, such as a personalized newsletter. However, some organizations may handle thousands of applications and millions of customers, and require the ability to build complex, multi-level statements. Depending on your company's requirements, you may need only certain of these modules. To this end, Dialogue is arranged in individual suites that will compliment your needs.

Available Suites and Options

The suites are designed to offer all modules necessary to fulfill the specific input, output, and administrative needs of your organization.

Modules in the Dialogue Suites

The following is a list of the available Dialogue Suites and the modules they include:

1:1 Document Suite

- ◆ Base 1:1 Document Creation (required for all configurations)
- ◆ Advanced Tables
- ◆ Dynamic Charting
- ◆ Publication Support

High Volume Production Suite

- ◆ High-Volume Print/Mail
- ◆ Output Sorting

Integrated Marketing Suite

- ◆ Campaign Management
- ◆ Advanced Campaign Management and Tracking

Document Management Suite

- ◆ Regulatory Support

Advanced Data Access Suite

- ◆ Dynamic Data Access
- ◆ XML Input
- ◆ Print Miner
- ◆ Dynamic File Import

NOTE: For a more detailed description of the Modules and Suites, see the related sections later in this chapter.

Drivers

Dialogue also offers electronic and print drivers to assist in output of data to a variety of media. The **pDrivers** and **eDrivers** available are:

pDrivers

- ◆ **AFP**
- ◆ **Metacode**
- ◆ **PostScript**
- ◆ **PCL**
- ◆ **PPML**
- ◆ **VPS**

eDrivers

- ◆ **PDF**
- ◆ **XML**
- ◆ **RTF**
- ◆ **HTML**
- ◆ **TIFF**

Production Environment Options

- ◆ **NT** – A high-volume print/mail environment.
- ◆ **UNIX** – A high-volume print/mail environment.
- ◆ **MVS** – A high-volume print/mail environment.
- ◆ **Production** – This option allows you to produce the output files that will be used by the output media.
- ◆ **CPU Restrictions** – This option restricts the number of CPUs that can run Dialogue. You must purchase a license for each workstation.
- ◆ **Designer** – This option allows you to produce designs in Designer as actual output to be sent to printers or electronic media in the Windows environment.
- ◆ **DBCS** – This option allows you to use double-byte characters as input and output in Dialogue. This gives you the ability to produce Oriental characters, which require the larger character set.
- ◆ **Dongle** – This option allows you to produce a specified amount of printed output by means of a hardware device attached to your CPU.

Your Dialogue Sales Representative and Dialogue Options

Your *Dialogue Sales Representative* will work with you to design a system for your organization that uses only the suites and modules you need. You should contact your *Dialogue Sales Representative* for the latest pricing and suite availability.

2.3 1:1 Document Suite

In addition to the personalized document creation abilities of the basic software, the **1:1 Document Suite** contains modules that allow you to create sophisticated tables, charts and publications using transaction driven data. The modules included are:

Base One to One Module

Basic Content Management, Design, and Document Production

Dialogue Content Manager, **Dialogue Designer**, and the **Dialogue Engine** comprise the basis of Dialogue programs.

With the basic suite in place, you can:

- ◆ **Manage** all of the *objects* you **create** in the object **Library**.
- ◆ **Design** messages of any type with a technologically advanced graphic design program.
- ◆ **Produce** output for print or electronic media, according to the PDL you have chosen. (Additional PDL's are available.)
- ◆ **View** your composed files through the **Dialogue Viewer**, which operates through the **Dialogue Designer** interface.

Features

Specific features that are included when you purchase the basic suite are:

- ◆ The ability to interact with the program **intuitively** through a Windows 98/NT/2000 GUI interface.
- ◆ The ability to **create complex communications objects**, such as messages, pages, and documents, and to arrange those objects under an application, which defines a Dialogue Engine run.
- ◆ The ability to **visually arrange** all of the objects you have created in a tree-like structure called the **Library**.
- ◆ The ability to **prioritize objects** in the **Library**.
- ◆ The ability to **drag and drop** objects in the **Library** and to visually perceive the effects of your actions.
- ◆ The ability to **assign properties** to the objects you create, which control the selection and behavior of the object, including simple or complex **rules**.
- ◆ The ability to **create variables**, which give you the ability to further specify the selection and behavior of objects, according to any criteria you specify, such as date, customer information, number of objects to include, or page number limits of the application.
- ◆ The ability to call **User Written Functions in Dynamic Link Libraries** for test and production data sources.
- ◆ The ability to **select customers** from your data based on any information your have about them.
- ◆ The ability to **manage whitespace** in your documents.
- ◆ The ability to work with **text** as in any word processing program.
- ◆ The ability to **check spelling** with the 14 dictionaries that are included, and to add technical and professional dictionaries to the Spell Checker.
- ◆ The ability to **manipulate text**, including formatting, rotating, and creating rules to substitute text according to customer data.

Feature Overview

- ◆ The ability to **import** .rtf text.
- ◆ The ability to **design drawing objects**, such as lines, polylines, shapes, polyshapes, text boxes, static tables, and barcodes.
- ◆ The ability to add **photographic images** to your designs.
- ◆ The ability to design **on the fly** in other programs, and use OLE objects in your designs.
- ◆ The ability to **map your existing data** so that Dialogue can use the information you have gathered.
- ◆ The ability to **view your composed files** through the **Dialogue Viewer**, which operates through the **Dialogue Designer** interface, and by double-clicking on the composed object, correct any flaws in your original design.
- ◆ The ability to **configure printers** for the system so that your output will be tailored to your hardware.

Enterprise Support Features

This group of features for Dialogue Content Manager gives added functions important to large organizations, particularly in a global environment where control across departments and various office locations is necessary.

The following control features are available with Enterprise Support:

- ◆ Control of **currency conversion**.
- ◆ Control of **multiple languages**.
- ◆ Control of **approval**.
- ◆ Control of **versions**.
- ◆ Control of **fonts**.
- ◆ Control of **weight** computation and **postage**.
- ◆ Control of **campaign targeting** based on tracking.
- ◆ Control whether **response data** is available for tracking, with the tracking knowledgebase.

Statement Tables Module

Advanced Statement Table Processing

The following features are available in the Advanced Tables Module:

- ◆ The ability to use **advanced document composition**.
- ◆ The ability to use **section-based processing**.
- ◆ The ability to use **rules on rows**.
- ◆ The ability to use **dynamic rows**.
- ◆ The ability to use **repeating rows**.
- ◆ The ability to use **grouped rows**.
- ◆ The ability to use **sets of rows**.
- ◆ The ability to use **rules on columns**.
- ◆ The ability to use **multi-column flow**.
- ◆ The ability to use **hierarchical headers** and **footers**.
- ◆ The ability to use **table sorting**.
- ◆ The ability to design **statements** and **complex statements**.

Dynamic 3D Charts Module

The following features are available in the Dynamic Charts Module:

- ◆ The ability to create **line charts**.
- ◆ The ability to create **bar charts**.
- ◆ The ability to create **comparative bar charts**.
- ◆ The ability to create **stacked bar charts**.
- ◆ The ability to create **horizontal stacked bar charts**.
- ◆ The ability to create **progress bar charts**.
- ◆ The ability to create **area charts**.
- ◆ The ability to create **pie charts**.
- ◆ The ability to create **calendar charts**.
- ◆ The ability to create **3-D charts**.
- ◆ The ability to control the **color of the line, fill, and shadow** of the chart.
- ◆ The ability to control the **color of the edge** of pie and bar charts.
- ◆ The ability to use **conditional color** for charts.
- ◆ The ability to create **legends** for charts
- ◆ The ability to control the appearance of the **frame** around the chart and whether it appears.
- ◆ The ability to define **data series**.
- ◆ The ability to format features of the charts **separately**.
- ◆ The ability to use or discard **small values** and **percentages** in charts.
- ◆ The ability to use variables to control the data of the chart, and compose **custom charts** for each customer.

Publication Support Module

The following features are available in the Publication Support Module:

- ◆ The ability to use and format **footnotes**.
- ◆ The ability to use and format **indexes**.
- ◆ The ability to use and format **tables of contents**.
- ◆ The ability to use dynamic numbering within a publication (**folio numbering**).

2.4 Advanced Data Suite

Advanced Data Suite modules manage input from other data sources. These include: rtf files, G4 TIFF files, print data files, with the **Print Miner** and input from Internet files with **XML Input**. These features are unequalled for combining existing data files with color control, images, and all Dialogue formatting features.

Dynamic File Importing Module

The following features are available in the **Dynamic File Importing Module**:

- ◆ The ability to use **Placeholder variables** and import **G4** and **RTF** files.
- ◆ The ability to use an **Electronic Warehouse**, a repository for files that are constantly substituted.
- ◆ The ability to use **DynaMessages**, messages that are imported at run-time.
- ◆ The ability to use the **Dynamic File Importing** feature in **advanced tables**.
- ◆ The ability to use custom **tag sets**.

Print Miner Module

The following features are available in the **Print Miner Module**:

- ◆ The ability to **map print output files** and use the data in documents that you format in Dialogue.

XML Input Module

The following features are available in the **XML Input Module**:

- ◆ The ability to **map XML files** and utilize the data in your documents that you format in Dialogue.

Dynamic Data Access

The following features are available in the **Dynamic Data Access Module**:

- ◆ The ability to access user-written routines, (.dlls), to process data. This allows Dialogue to process transaction data in real time, support encryption/decryption applications, and read/write to any corporate database or application. \
- ◆ The ability to replace any of the Dialogue driver, initialization, reference, and report files to eliminate flat file input and data retrieval.
- ◆ The ability to use table look-up on the fly and spawn other processes.

2.5 High-Volume Production Suite

The **High-Volume Production Suite** provides the tools necessary for processing large quantities of customer documents through a High-Volume printing and mailing facility. The modules included are:

High-Volume Print/Mail Module

The following features are available in the High-Volume Print/Mail Module:

- ◆ The ability to use **Insert Messages**.
- ◆ The ability to use **Graphic or Insert Messages**.
- ◆ The ability to configure **Barcodes**.
- ◆ The ability to use **Banner Pages**.
- ◆ The ability to configure **Output Queues**.
- ◆ The ability to use **System Queue Variables** to control your **output**.
- ◆ The ability to use **Imposition** layout in your **Booklets**.

Output Sorting Module

Output sorting offers additional post-processing controls for use with the Dialogue suite of programs.

It offers:

- ◆ Additional sorting capabilities beyond the scope of output queues alone.
- ◆ The ability to sort processed output for the addition of **last minute updates** from a keyed file.
- ◆ Combine information from **additional customer driver files** and sort.
- ◆ Accomplish **document regeneration**—printing only certain customer documents from an existing output file.
- ◆ Combine multiple output files for **batch aggregation** and sort.
- ◆ The ability to sort processed **output by weight** for use by external programs such as postal cleansing and mail sorting programs, that standardize addresses and separate output for best postal discounts based on the latest postal regulations.
- ◆ The ability to add final **queue breaks** to processed output, such as tray breaks for post-processed output. This gives you the ability to break the output to the amount that will fit in a standard mail tray or to any size container.
- ◆ The ability to accomplish a final update, even when **combining queues**.
- ◆ The ability to sort: alphabetically, according to customer number, or by geographical location and so on. This sort can also be based on any information on which you have a **key index** for the customer.
- ◆ The ability to **cleanse and update addresses**.
- ◆ The ability to use any **late-breaking transaction information** about the customer.

2.6 Campaign Management Suite

The **Campaign Management Suite** helps you maintain a timely, personal flow of communications to each customer. The modules included are:

Campaign Management (Customer Relationship Management) Module

The **Campaign Manager Module** gives you the ability to create and target marketing information consisting of **dynamic messages** or **preprinted material** and the **frequency** with which it is sent to a customer.

Special features include:

- ◆ The ability to control the total **number of times** a campaign is sent.
- ◆ The ability to control the **frequency** with which a campaign is sent.
- ◆ The ability to **simplify** the implementation of customer information delivery systems.
- ◆ The ability to **prioritize** for each customer (send the most important message that fits in the space available).
- ◆ The ability to **target** messages based on qualification rules and parameters.
- ◆ The ability to **limit** marketing content so postage costs are not increased, either by **weight** or **cost**.
- ◆ The ability to generate **additional revenue** by selling ad-space.
- ◆ The ability to design campaigns in a **media-independent** environment.
- ◆ The ability to develop 1:1 marketing campaigns—unique content that is personal, intimate, and focused.

Advanced Campaign Manager and Tracking (Knowledgebase) Module

The **Advanced Campaign Manager and Tracking Module** allows you to communicate with your customers on a **real-time** basis. It manages message distribution information for all applications and media. It can incorporate response data for future targeting and provide distribution reports for charge-back and audits.

Special features include:

- ◆ The ability to **link** messages - sent based on **frequency of distribution** or **response to subsequent** additional messages.
- ◆ The ability to **control the delivery frequency** of messages.
- ◆ The ability to **limit the number of times** a message is sent.
- ◆ The ability to **discontinue** messages once a customer has responded.
- ◆ The ability to send tracking data to an **external database**.
- ◆ The ability to **update** with results from response systems.
- ◆ The ability to **analyze** with tools to measure the distribution and effectiveness of campaigns.
- ◆ The ability to **report** distribution for charge-back and audit.

2.7 Document Management Suite

The **Document Management Suite** allows you to control content by assigning **Jurisdictions** and **Effectivity**.

Regulatory Support Module

The following features are available in the Regulatory Support Module:

- ◆ The ability to use **Jurisdictions** to control exact content for different geographical or demographical areas.
- ◆ The ability to use an **Effectivity**, to substitute verbiage and other content for a range of dates.
- ◆ The ability to add regional groups to control multiple jurisdictions.

2.8 pDrivers

Output Production Format Modules - Print Drivers

A growing variety of PDL (Printer Definition Languages) is available to adapt to output configurations. Contact your *Dialogue Support Representative* for the latest additions.

The following PDLs are available for Dialogue output:

AFP

The AFP output produced by Dialogue supports Image Output Content Architecture (IOCA) and Image Format 1 (IM1) formats, raster font creation and inclusion, Graphic Object Content Architecture (GOCA) shading and drawing components, Tagged Logical Element (TLE), and No Operation (NOP) record creation. All resources except Form Definitions (Formdefs) are created and can be included in the print stream. Color modes supported include AFP full color, AFP OCA in color and black and white, highlight or spot color, and black and white.

Metacode

Metacode is an older standard for Xerox high-speed laser printers. Dialogue-produced Metacode output allows for image and font creation on the fly. Dialogue adds kerning and tracking for fonts, as well as enhanced shading and area patterns, to extend the base functionality of Metacode. Full color, highlight and dual tone, and black and white color modes are supported for both online and offline environments.

PCL

This module provides functionality for PCL version five printers. It supports black and white, grayscale, highlight color, and full color modes.

PostScript

Dialogue supports Level 2 and Level 3 PostScript devices. Dialogue automatically builds forms and images, and places them at the top of the print stream so they can be pre-ripped and referenced. Type42 fonts (available in PostScript v2.013 and above) and Type1 fonts can be created to support all Level 2 and Level 3 PostScript printers. Full color, highlight color, gray scale, and black and white color modes are supported.

VPS

Variable Print Specification. This language is a CreoScitex extension to the PostScript Language. It allows RIPing of pages at the rate required for digital color printing, while each page is personalized. Reused components of the page are saved in memory and arranged as required. The focus of this language is printed media.

PPML

Personalized Print Markup Language. This PDL features object level addresses and the ability to reuse the print file. The language uses XML (Extensible Markup Language), as a structural base. This language, conceived in 1999, lets a printer behave like a Web browser in that it can hold data in memory and present it as required for a customer.

2.9 eDrivers

PDF

The PDF module creates fully composed PDF files, and therefore is searchable using Adobe's Acrobat Reader. Dialogue automatically builds bookmarks so documents and their components are organized and indexed. Support for the standard base 14 fonts is included, as well as the creation and inclusion of other TrueType fonts. This guarantees the PDF output has the identical look of documents sent to other devices. Additionally, Dialogue provides binary compression to minimize the size of files. Full color, highlight color, and black and white color modes are supported, for dependable reproduction on monitors and printers.

RTF

The RTF module gives interchangeable formatting support to applications like Microsoft Word. The output can be formatted for use on the Internet.

XML

This PDL supports XML output for online viewing internally or externally. It will generate "well-formed" XML for all applications, which can be used in web output.

HTML

This module creates HTML output, the current standard for publishing hypertext on the World Wide Web. It is a non-proprietary format based upon SGML, and can be created and processed by a wide range of tools—from text editors to WYSIWYG authoring tools.

TIFF

TIFF output is a widely used format for storing image data. TIFF is the standard format for faxing and storing documents in archival and retrieval systems.

eFulfillment Module

This Dialogue module allows your customers to submit on-demand requests for information through Web forms you have designed. Dialogue will process the request in real time and deliver the resulting e-document to the customer by displaying it on the Internet or sending it via email. This is an add-on module in Dialogue.

Dialogue's eFulfillment Module consists of three components:

- ◆ **Dialogue Web Manager:** A Microsoft Windows executable program used to manage the data repository for the Dialogue Form Parser.
- ◆ **Form Parser:** A COM component, callable from a Microsoft Internet Information Server (IIS) Active Server Page (ASP), that extracts information from a Web form and places it in a file to be processed by the Dialogue Engine. The type and formats of records are stored in an XML (Extensible Markup Language) data repository, managed by the Dialogue Web Manager, and are retrievable by the Form Parser.

Feature Overview

- ◆ **Engine Control Module:** A COM component, callable from an Active Server Page, that passes arguments to the Dialogue Engine, and then synchronously calls the Engine to process data created by the Form Parser.

The Web Manager

The **Web Manager** gives you the ability to define how a form (Active Server Page) will interact with the **Dialogue Engine** – thereby creating the front-end output for the customer, while maintaining the reporting and tracking functions in Dialogue. Now instantaneous customer interaction is a reality. You can evaluate customer preferences by the response they give you *today* through the Internet!

These Dialogue features are active through the **Web Manager XML process**:

- ◆ Targeting
- ◆ Tracking
- ◆ Reporting
- ◆ Messaging

The **Dialogue Web Manager** is an additional Dialogue application that works in conjunction with the **Dialogue Engine**. Your customers can request customized information via an Active Server Page (ASP) on the Internet.

NOTE: Contact your *Dialogue Sales Representative* for more details about the **Interactive Suite**, which will be available in late summer of 2002.

2.10 Usage Metering Module - Additional Billing Option

Dialogue may be licensed on a per-use basis. Payments will be based on the use of the software as determined by a usage meter. If this means of purchase might suit your needs, contact your *Dialogue Sales Representative* for further information.

The usage meter:

- ◆ Tracks every application run.
- ◆ Allows for testing before charges are tracked for production.
- ◆ Gives production statistics for each application.
- ◆ Is associated with a specific set of CPU IDs.

2.11 Dongle Required Option

One way that you can purchase Dialogue is with the **Dongle Required** option. Functionality for production is enabled by means of a system key and hardware dongle that allows you to use Dialogue for a certain optional amount of output. The dongle meters the use of Dialogue according to your contract, and if you use this option, Dialogue will not run in production without the dongle in place.

Dongle Licensing Options

Dongle Only

You must have the dongle attached to run the Production Engine. The name on the dongle must match the your name on your key.

Dongle Page Metering

You must have the dongle attached to run the Production Engine. The name on the dongle must match the your name on your key.

- ◆ Each time you execute a production run, the number of pages printed is charged against the dongle.
- ◆ When the purchased number of pages is used, the Engine will not run.
- ◆ If you run out of pages in the middle of a run, the run will finish to completion.
- ◆ Dialogue does not count any blank pages when charging for the pages.

When using this method, be sure to monitor the number of pages you are printing. The dongle-enabled version of Dialogue works by counting the number of pages you have used. The maximum number of pages that can be purchased is two billion, or to be exact, according to code limitations, 2,147,483,647.

Dongle Maximum per run Page Limit

You must have the dongle attached to run the Production Engine. The name on the dongle must match the your name on your key.

- ◆ You are limited to printing the specified number of pages per run (blank pages not included).

Dongle Page Metering With Page Limit

Combines the restrictions required for both Dongle Page Metering and Dongle Page Limit modes.

NOTE: Contact your *Dialogue Sales Representative* for pricing information.

2.12 Double-Byte Character Sets (DBCS)

Oriental Characters in Dialogue

Dialogue supports Unicode character sets for extended character alphabets for Chinese, Japanese, and Korean by means of a **system key** enabled for this support. If you have purchased this system and are using a DBCS, DBCS will show in the **Title Bar** in Dialogue.

If you will be using this version of Dialogue, see the [Reference Guide to DBCS](#).

2.13 Applications – Use of Dialogue

Imagine - No Cost Advertising

Imagine being able to focus the attention of your customers on your best deals or special offers without interrupting your billing operations, or even using extra postage! Imagine being able to generate your own statements or web pages completely free of cost to you, because costs are picked up by your advertisers!

Utilize or Sell Ad Space

Combining forces in the marketplace has become a way to thrive in a world economy. Many decision makers have concluded that selling marketing space is the best way to assure that communication costs stay in the black.

Lower Your Costs and Simplify Your Operations

Dialogue offers its primary benefit to you, as the service provider.

No expensive advertising space is wasted on items that the customer does not want. Every ad counts because it is a potential sale. Dialogue offers simplicity and ease of management of even the most complex targeting needs. You can combine any number of targeting factors at many stages of design, offering you the ability to combine the goals of many departments in-house, with the ability to sell unneeded space to outside vendors, should you so desire.

Our Customers have Imagination

Leaders in the financial services, telecommunications, insurance, retail, service bureau, and eCommerce industries have already discovered how Dialogue can make their businesses more competitive:

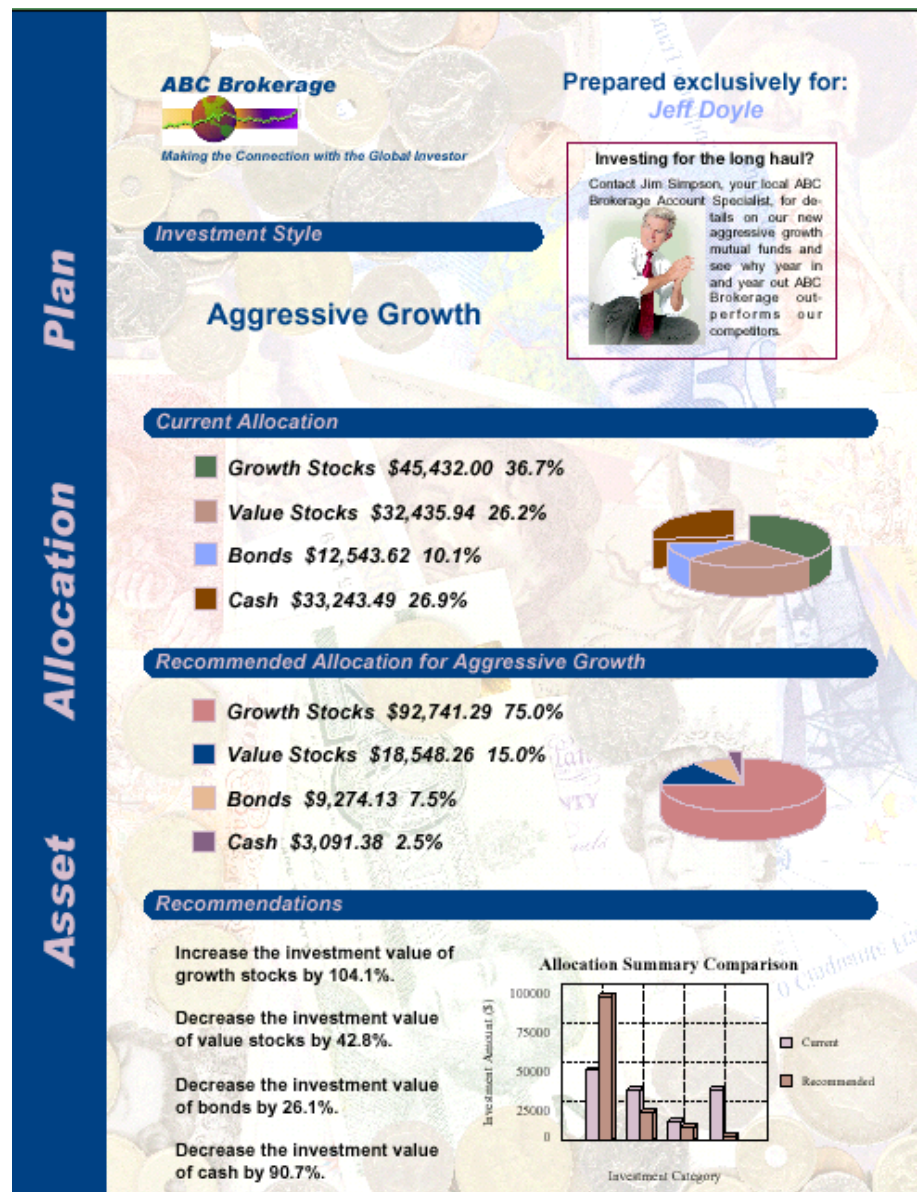
- ◆ Driving more revenue from current customers
- ◆ Improving time-to-market by up to 80 percent
- ◆ Delivering the most relevant and valuable information to customers
- ◆ Offering personalized electronic documents on demand

The examples that follow show you how you can use Dialogue to accomplish similar goals.

Application: Investment Statement

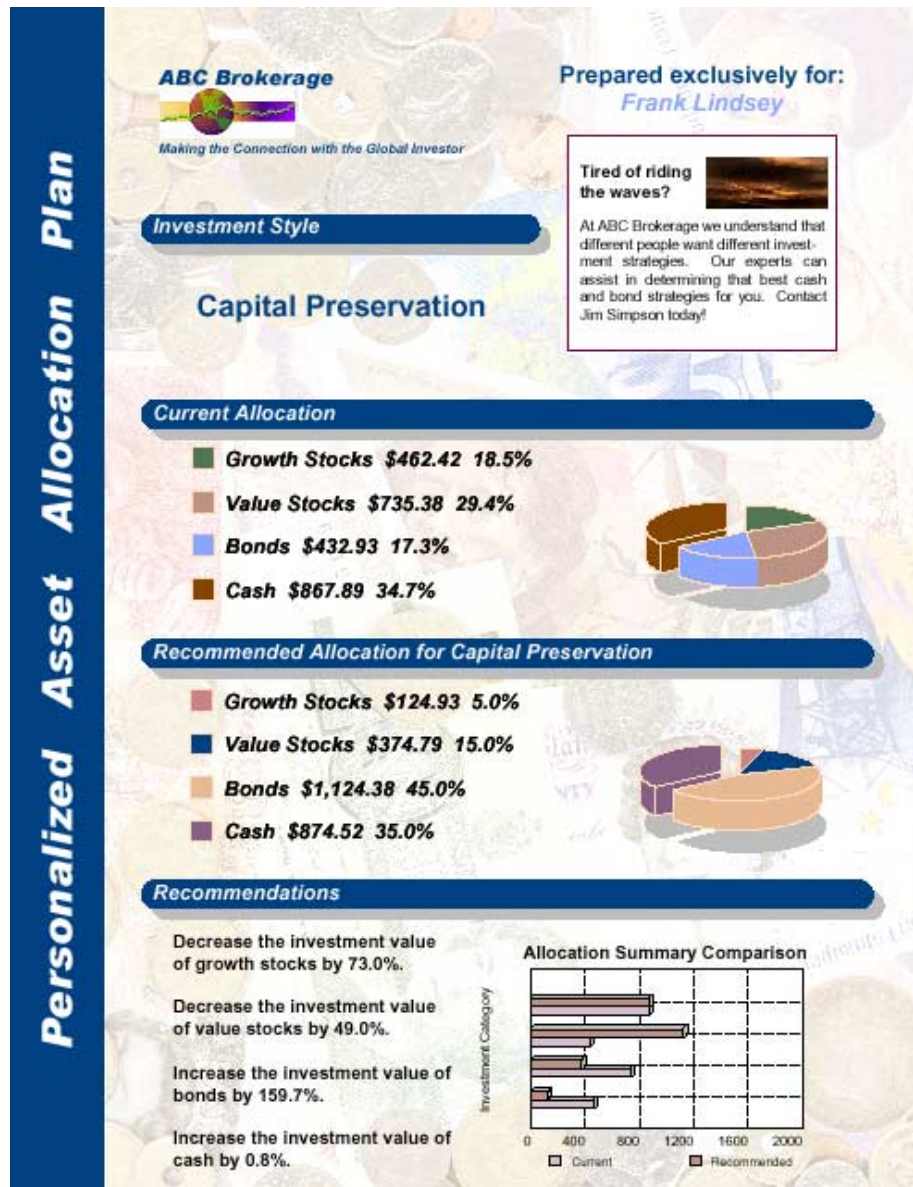
Financial institutions offering the "next generation" of statements combine basic account transaction data with overall portfolio information. Financial services providers use Dialogue to meet high-end requirements for concurrent paper and electronic statement delivery. Dialogue offers the most advanced multi-dimensional charting capabilities available to enhance and personalize statements.

Sample One Personalized Statement



Feature Overview

Sample Two Personalized Statement



Application: Telephone Bill

The telecommunications industry is challenged to increase customer loyalty, and faces some of the toughest requirements for statements and invoices. Challenges include convergent bills for different service providers, and invoices that combine local service with long distance charges, cellular plans and calling card services. Dialogue provides an advanced set of capabilities to meet these complex requirements. In addition, with its campaign management capabilities, Dialogue can turn invoices into marketing tools that recommend additional services based on customer usage patterns.


Telephone Bill

Charles F. Goolwin 344 East Main St. Akron, OH 56902		Phonecom 1789 Fourth St. Youngstown, MI 45638		phonecom	
--	--	---	--	-----------------	--

Invoice for period 2/1/00-3/1/00					
10:45 PM	2/1/00	Akron, OH to Madison, WI	22 min	13.03	Mr. Goodwin, right now we are offering special long distance rates to Kansas and California on weekday evenings. Check out www.phone.com for details
03:33 PM	2/3/00	Akron, OH to Spokane, WA	45 min	25.00	
05:56 PM	2/3/00	Akron, OH to Toledo, OH	15 min	07.56	
11:17 AM	2/6/00	Akron, OH to Lexington, KY	36 min	18.00	
06:20 PM	2/8/00	Akron, OH to Lexington, KY	8 min	04.25	
08:00 PM	2/8/00	Akron, OH to Detroit, MI	16 min	09.45	
05:45 PM	2/15/00	Akron, OH to Chicago, IL	02 min	02.05	

Calling Card Charges					
10:34 AM	2/18/00	Houston, TX to Akron, OH	56 min	25.20	Rates and coverage subject to change without notice.
10:45 PM	2/18/00	Houston, TX to Akron, OH	25 min	10.34	
06:21 PM	2/18/00	Atlanta, GA to Akron, OH	06 min	00.45	
011:45 PM	2/20/00	Atlanta, GA to Akron, OH	33 min	18.65	

Total Charges	
Long Distance charges	\$67.98
Calling Card Charges	\$43.90
Caller Id Charges (stnd)	\$10.50
Call Waiting charges (stnd)	\$10.50
Internet Connection	\$35.00
Total Charges	\$167.88

Saving money is easy!	
Compare our long distance rates to the other leading phone companies. Talk to us about updating your long distance plan.	
Phonecom	
Savings	

Total Enclosed	
Account Number	

2.14 Leverage eCommerce Opportunities

Dialogue can be integrated into your eBill process to give you direct access to your customers on an ongoing basis.

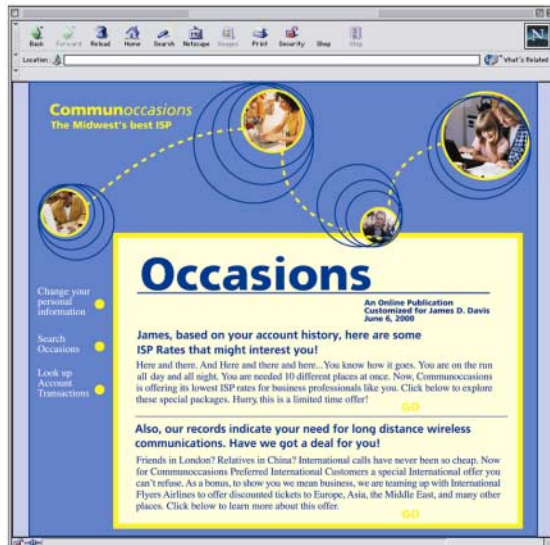
Dialogue's customer relationship software enables you to:

- ◆ Manage the delivery of 1:1 messages based on past-interactions, the billing information, and other data available
- ◆ Sell and manage ad space and other customer-access programs
- ◆ Provide on-demand generation of other personalized products, such as personalized newsletters or catalogs, to supplement the billing materials.

Application: Customized Online Brochure

Customers can enter their information preferences on their own computers or through a kiosk and an online brochure is created to meet their specific information requests in real time, without the expense of printing or mailing.

E-Fulfillment Sample



Communoccasions
Would you like to receive our weekly online newsletter?

☐ Yes, Please send me Occasions ☐ No, thanks

Please choose several of the boxes below to help us customize our newsletter to meet your needs.

I would like information on:

☐ Business rates ☐ Special offers
☐ Software/Hardware ☐ Company Information

Please enter your e-mail address

2.15 An Overview of the Dialogue Company Departmental Process

Group Process

Dialogue is designed to allow groups or departments (company departmental units) to assume certain responsibilities in the document production process. It is designed to allow the marketing group to build and manage marketing messages and campaigns in a process separate from the development of the business document or page layout and design, and from the ongoing administration of the system.

Flexibility

The *system administrator* or controlling officer in the organization can configure the system in an infinite number of ways to suit the needs of the company. Depending on document complexity and organizational priorities, the marketing organization may take on responsibility for the document-design process, the document group may build the marketing campaigns, and any number of departments can be involved in the overall process.

Company Departmental Division of Responsibilities

The **document design group** can perform the following basic functions:

- ◆ Build the base document.
- ◆ Define locations on the page where marketing will be placed.
- ◆ Build page layouts for marketing-only pages, such as ad pages.

A separate **design** department may exist for the actual design of messages and graphics for the base document.

The **marketing group** can perform the following basic functions:

- ◆ Analyze demographic data and marketing trends.
- ◆ Design marketing messages and campaigns.
- ◆ Associate campaigns with each mailing for which they will be distributed.
- ◆ Analyze the distribution and effectiveness of the campaigns with results available from responses tracked in Dialogue.

The **administrative group** can perform the following basic functions:

- ◆ Administer the network.
- ◆ Program the software.
- ◆ Manage security settings.

Group Process Management

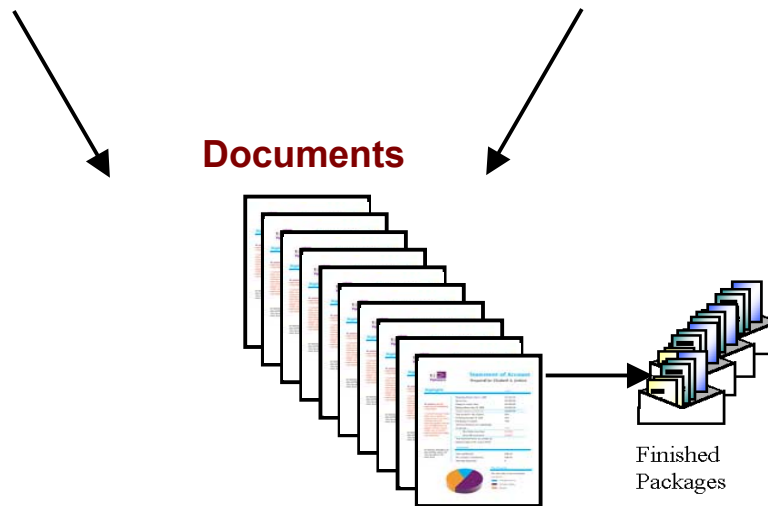
Document Design Group

Designs the Documents



Marketing Group

Plans and Administers the Campaigns



Benefits of Division of Responsibility

The separation of the group processes provides the following benefits:

- ◆ Marketing campaigns can be designed generically, so that they can be used and reused in any document application.
- ◆ Marketing personnel do not have to be familiar with the document application or the environment in which the documents might be printed (technical processes like barcodes, inserters, AFP, PostScript, or Metacode).
- ◆ Document groups can build the documents without ongoing changes or special processing instructions from marketing.
- ◆ Management can use controls and security to provide:
 - Constant corporate image fidelity.
 - Overall consistency in design of documents.
 - Network security.
 - Uncontaminated data for clear decisions on campaign viability.

Chapter 3: Function Overview

This chapter provides an overview of the functions of Dialogue and highlights the technical capabilities of the software. Please take some time to become familiar with the concepts in this chapter.

3.1 Functional Division

Dialogue is concerned with two main functional issues:

1. Document and Campaign Design – the **Design Environment**.
2. Document Production for all media – the **Production Environment** (the **Dialogue Engine**).

The features of Dialogue fit under these two headings, and are discussed in the following sections.

3.2 Design Environment

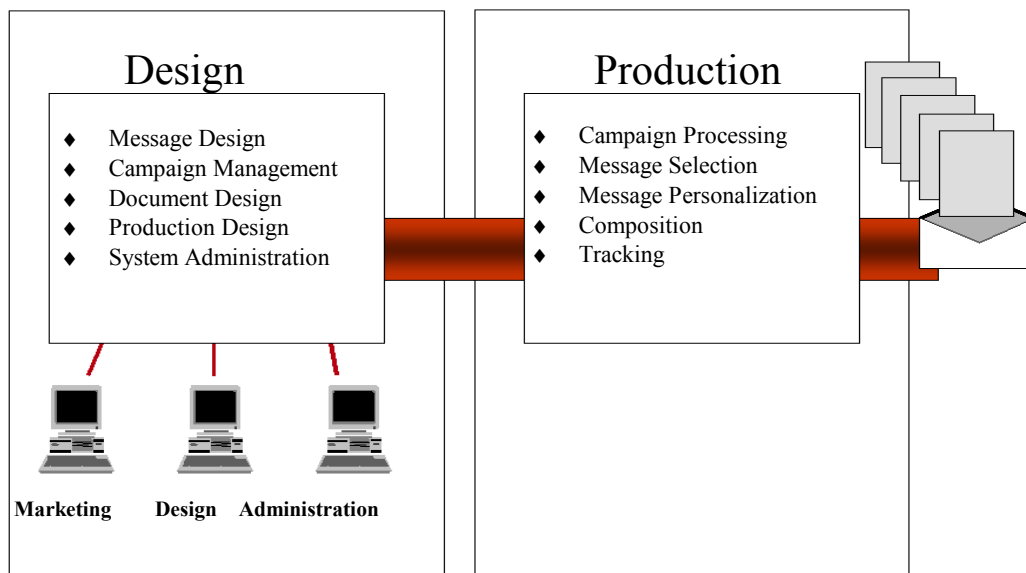
Dialogue users can create communications within a networked design environment. In this environment, there are two programs:

Dialogue Content Manager: A management program used to create and manage the various objects used to build communications, to manage the users and security, and to define the delivery environment (printers, Internet, and mailing systems).

Dialogue Designer: A graphic design tool used to develop the design elements of the documents.

TECHNICAL NOTE: All design information is stored in an MS ODBC-compliant database residing on Windows 98/NT/2000.

Design Environment and Production Function



Dialogue Content Manager

This user-friendly program allows you to manage all of your designed objects, as well as specify the **contents** of each run of the Dialogue Engine and configure your printers.

Dialogue Designer

Some of the functions of the layout and drawing **design** tool are described here.

Standard Graphic Design Environment

TEXT

PC font types
Multiple columns
Personalize
Rotate
Text-filled shapes
Variable file insertion

IMPORT FROM

Most Windows programs
Microsoft Word and PowerPoint
WordPerfect and CorelDraw
Adobe Photoshop and Illustrator
RTF
Import "on the fly"

TABLES

Easy insert
Complex cell formats
Automated rows
Automated sections
Insert variables
Section data
Row sets

IMAGES

Import most formats
Scale
Convert to black & white
Dithering options
Grayscale and screens
Color management
Resolution controls

DESIGN CONTROLS

Templates
Object restrictions
Font restrictions
User restrictions
Simplex or duplex
Multiple language layers

PERSONALIZATION

Customization
Images and shapes with rules
Dynamic positioning
Personal charts
Wrap around
Dynamic colors

The Dialogue Design Engine

The Design Engine functions on the Windows workstation and packages an application so that it is ready for production.

3.3 Production Environment

The Dialogue Production Engine

The Dialogue Engine is a stand-alone program that builds personalized communications for customers. It is a batch, transaction-oriented, program that can run on various computer platforms.

The Design - Production Sequence

- ◆ First, objects are created.
- ◆ Second, the properties of the object are defined, and the object is formatted as necessary
- ◆ Third, objects are combined within an *application*, which is an object like a named folder with its own properties that holds all objects necessary for a particular Engine run.
- ◆ After all of the objects are built in the application in the Design Environment, the application is packaged.
 - Packaging an application takes place with the Design Engine.
 - The package file contains all of the objects needed for an Engine run.
 - The package file may be run in Windows for testing and actual production, or transferred to a mainframe.
- ◆ Actual composition of the finished documents is called, “Running the Engine.” this refers to the Dialogue Production Engine.

General users do not need to know about specific functions of the Engine. Consult the Guide concerning the Dialogue Engine for more details.

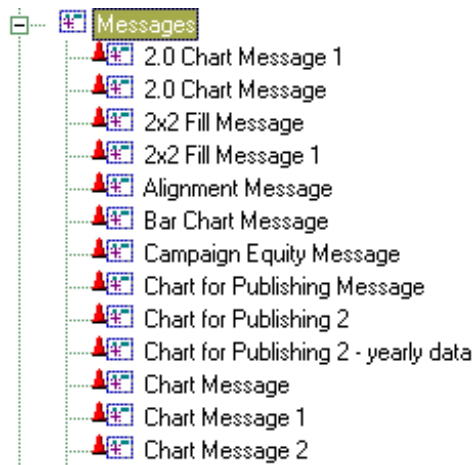
TECHNICAL NOTE: Users can write their own functions to call data sources in Dynamic Link Libraries. For more information about this function, see the [Reference Guide to Programming](#).

Chapter 4: Basic Object Function

In this chapter, you will learn about some of the basic *objects* in the **Library**. Each object is a building block of the application that will produce your documents.

4.1 Messages

Messages Heading in Library



A *message* is a communication to be sent to a group of customers usually those who meet a specific *targeting* rule. Examples of messages include news articles or ads. When a *document* is created for the customer, the highest priority messages for the customer are selected, personalized, and placed on the *pages*.

Normally, the messages are used to provide customer-focused marketing content for the customer. The business content is provided on the pages of the base document. Messages can be directly on the page, or included in the document for placement at Engine run time.

Message Types (Layout)

In Dialogue, the administrator sets up any number of message types that can be created by message designers or marketing personnel. Examples of message types include ads, coupons, news articles, advisories, notices, letters, notes, preprinted inserts, and just about any other type of business communication.

These message types are used to control where in the document (document means a printed document or Internet page) that the message can be placed. This ensures that only news articles are placed in the newsletter and only coupons are placed on the coupon page.

Newsletter Page with Various Messages



Type of Message

Dialogue uses three basic types of messages:

- ◆ **Text Only:** those that do not contain any graphics.
- ◆ **Graphic:** those that contain text, images, graphics, charts, and other objects, such as the ones pictured in the previous figure.
- ◆ **Preprinted inserts:** preprinted pages or documents that are added to the customers' mailing using a high-volume inserter. (Available only if Advanced Document Features – High Volume Print/Mail Module was purchased.)

Special Feature:

A fourth **Type of Message** is available within the interface called **Graphic or Insert**. If the preprinted insert is not available or not set up on the high-volume inserter, a replicated insert can be printed and inserted in its place.

Message Personalization

All messages can be personalized with variable data, including such data as the customer's name, their balance, their credit rating, product preferences, or any other data that your company defines in Dialogue. You can even change colors in the layout based on any criteria, such as customer preference.

Graphic messages may also include conditional components: text, text boxes, images, charts, and conditional tables with conditional rows and columns. This allows the designer to change the content based on customer data.

Message Targeting and Rules

Each message can include a rule that identifies the customers to whom the message should be sent. For example, the message about a portfolio municipal bond offer might only be sent to customers who have a high balance and a low percentage of municipal bonds in their portfolio.

NOTE: Message targeting can be ultimately controlled by a campaign. In this case, the campaign will have targeting and campaign dates and priorities to determine who should receive the message. See the section on campaigns for more information.

Text Message Design

Text messages are simply typed into a text box in Manager, or for more richly formatted messages in Designer. They can include any number of fonts, bullets, paragraph numbering, and any other text-oriented formatting.

An example of a text message that might be sent to a customer is:

<FirstName> Welcome to First Stability!

<FirstName>, you have made the wisest financial decision of your life! See the enclosed prospectus of our platinum securities package! We appreciate your patronage.

NOTE: Variables such as <FirstName> representing the customer's first name can be used in text and graphic messages. When viewing variables in Dialogue Manager, they are enclosed within angle brackets <>. In Dialogue Designer, the variables are indicated by a green wavy line under the design sample for the variable.

Graphic Message Design

Dialogue's graphic design program (Dialogue Designer) is used to design the graphic content of the message (and is also used to design templates and pages). The user interface is modeled after familiar word-processing and drawing programs. *Frames* function as in page layout programs, but Dialogue's frames have properties that control content. If you have used similar programs, the learning time is minimal.

Message Types

Message types control what goes in a frame. If you were building a personalized catalog application, you would probably need a type of message called a "catalog item." This **type** can be specified in frame properties and control the composition of the page.

Message Templates

All graphic messages are designed using a message template that defines the basic layout and design controls. Message templates control the size of the message, background graphics, design restrictions (such as fonts), and user restrictions (what the message designer is allowed to do).

A message template can be simple and just define the size of the message; or it can be more complex, providing background layout and design controls. Message templates also provide more control concerning which types of messages are placed on which pages within the composed document.

For example, they can ensure that the "premium catalog item" appears only on the first page of the catalog and not on the other pages. When you design your catalog, you may want to have many different sizes of catalog items included, such as:

- ◆ 2x2 inch catalog item
- ◆ Half-page catalog item
- ◆ Premium catalog item

Message Placement

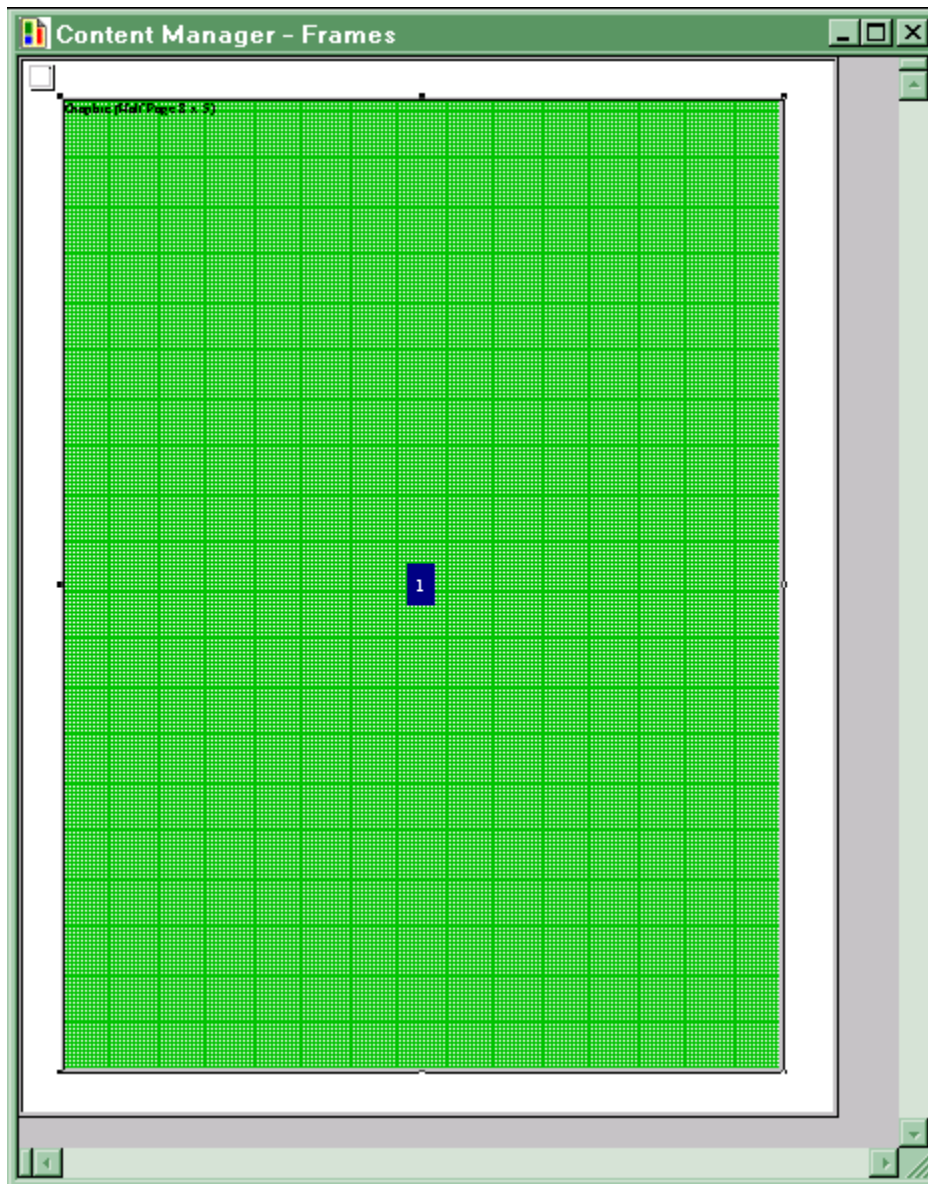
Messages are included in a mailing by including them in a campaign, or by including them directly in a document.

- ◆ **Campaign Messages:** Messages may be included in campaigns. When a customer document is processed, Dialogue determines which campaigns to send to the customer based on campaign targeting, priority, and the space available in the envelope or on the web page.
- ◆ **Document Messages:** Messages can also be included in the business documents. These messages are added before any campaign messages.

This separation allows marketing personnel to build marketing messages and campaigns independent from the business group. Campaigns and campaign messages can be easily used repeatedly in different applications.

4.2 Page Frames

Frame on a Page



The large shaded area on the page is a *page frame*.

Message Placement is Controlled by Frames

Messages are placed onto pages into *frames*. When the page is designed, you create page frames and designate the type of messages that go into them, the order that the frames are to be filled, and whether messages are allowed to flow from one frame into the next.

Basic Object Function

Example of Frames on a Page

On the following example of a *page*, there are five *frames*, indicated by the boxes. You restrict the messages that can go into a frame based on the type of text message (text-only news articles, for example), or by the template-type graphic message that is allowed (*Newsletter Chart*, for example). In this example, the frame used for a stock investment chart restricts the message to graphic messages that were created using the *Newsletter Chart* template.

The four frames visible in the following figure will be filled by graphic messages using: the *Side Banner Template*, the *Address Block Template*, the *Newsletter Chart Template*, and the *Stock News Template*.

Partial View of Page with Frames



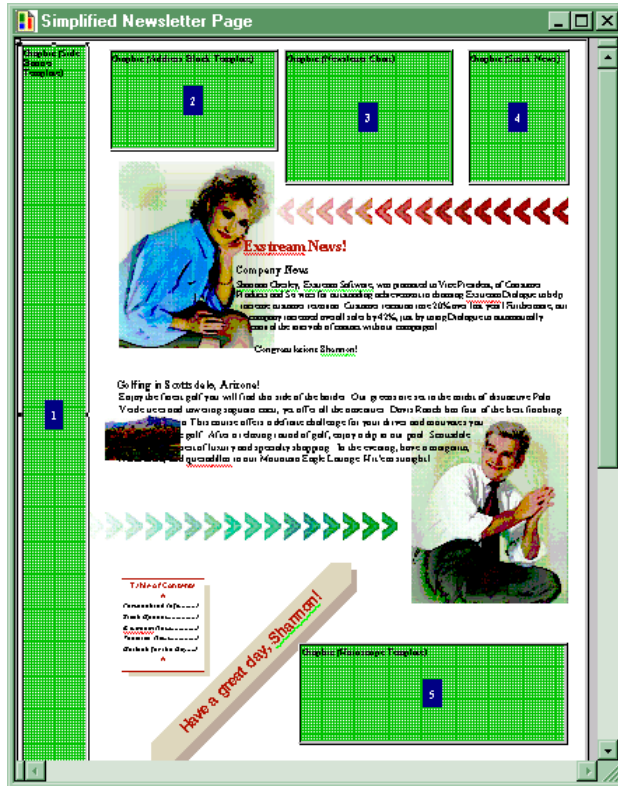
Partial View of Composed Page with Frames



Frames Specifications

Frames also define whether multiple messages are allowed in the frame and whether alternative message types are allowed. They can control the placement of indexes and tables of content. If a frame is *duplex*, it reserves the space on the front and back of the sheet. This is necessary for messages such as coupons and remittance slips that will be removed from the page.

Designer Page with Design Elements and Frames



Finished Page after Engine Composition



Frames and Text Messages

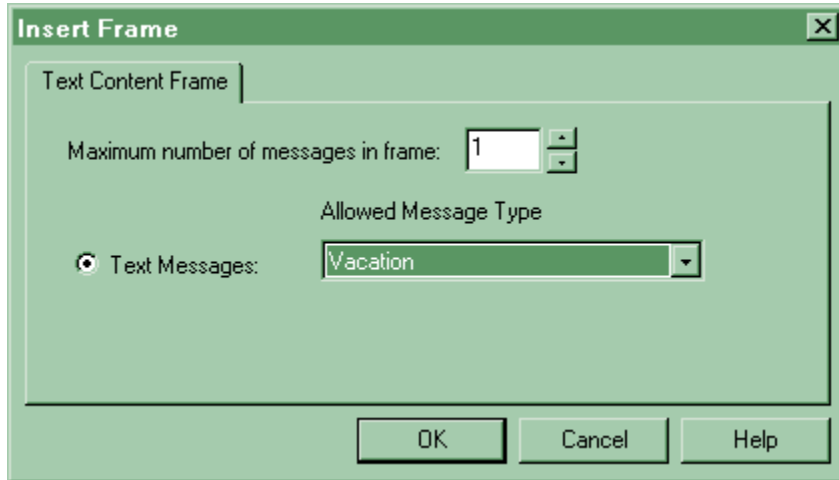
There are several ways to control text message selection and placement.

- ◆ You can place several messages, one on top of another, directly on the page. They will be selected according to rules attached to each message.
- ◆ You can add a frame that accepts only text messages, or text and graphics.
- ◆ You can select whether one or multiple messages go in a frame.
- ◆ You can specify the flow of a text message from one frame to another.
- ◆ You can draw a custom shape and fill it with text to make messages flow around images, as they do around the people in the figure.
- ◆ You can also specify that text be offset from a graphic, as it is around the scenic picture.
- ◆ You can make a custom text box with beveled corners and rotate it as shown in the Designer page. On the Designer page it reads, "Have a great day, Shannon." Notice the name is substituted for the correct customer name when the page is composed.

4.3 Text Content Frames

Another kind of frame lets you insert text messages into a text box, at the point where your cursor is located. These are called **Text Content Frames**. See the following figure.

Insert Frame Dialog Box



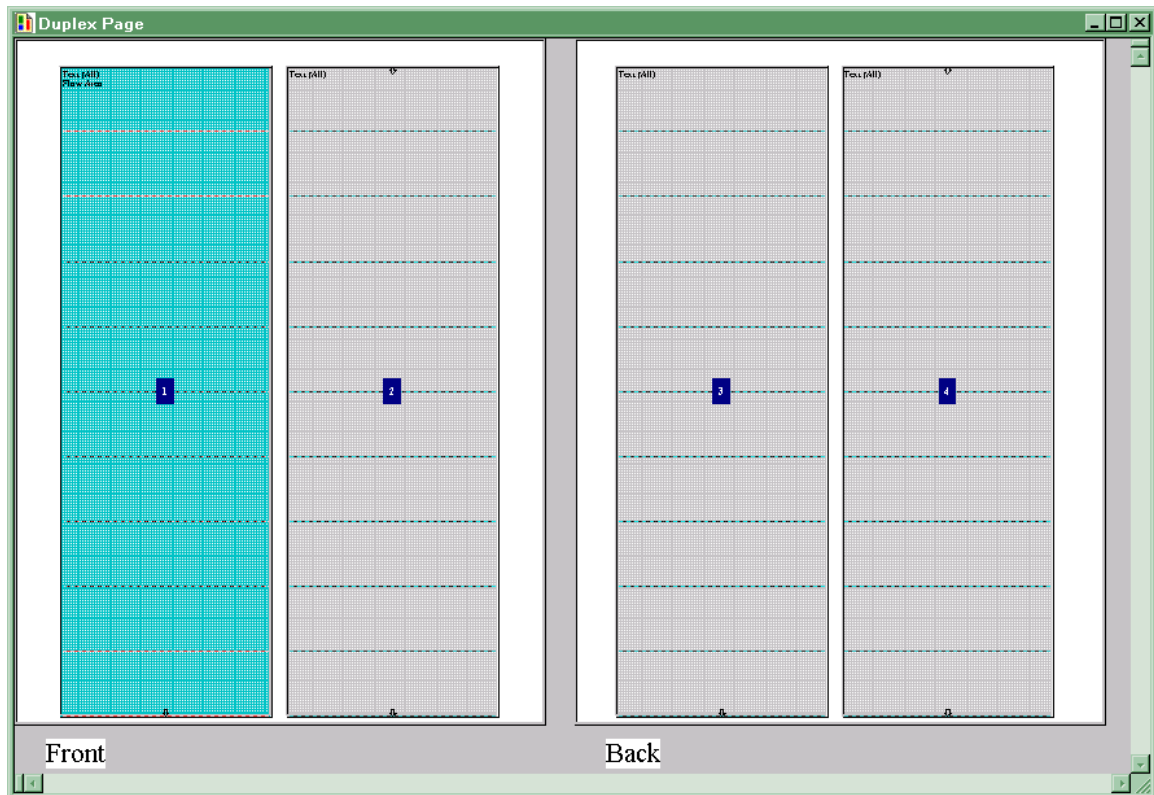
These frames can contain only text messages, and have an early compose time. For more information about these frames, see the [Reference Guide to Campaign and Message Management](#).

4.4 Pages

Pages are an area that can be viewed at one time. They can be **simplex** or **duplex**. Messages, variables, text, and graphic objects can be placed directly on pages, but usually these things are designed separately and received by frames on the page. this way, the objects can flow to more than one page if necessary and the document will be comprised of as many pages as necessary to contain all the objects.

Tables and charts often are placed directly on the page on which you want them to appear.

Duplex Page in Designer



4.5 Campaigns

Campaigns Heading in Library



Campaigns allow you control of time-sensitive and cost-sensitive communications. Only when you use campaigns, can you use the frequency, tracking, and response controls.

The Campaign Management Module

In order to use campaigns, you must have purchased the **Campaign Management Module**.

With the Campaign Management Module you can:

- ◆ Create campaigns
- ◆ Manage messages
- ◆ Schedule active dates
- ◆ Control versions of the campaign
- ◆ Include campaigns in various applications
- ◆ Target customers by means of variables
- ◆ Control postage

Many-to-Many Campaign Management

Most direct mail and marketing communications packages allow users to build one-to-many marketing applications. A direct mail piece, for example, is built with one campaign being sent to a targeted group of people.

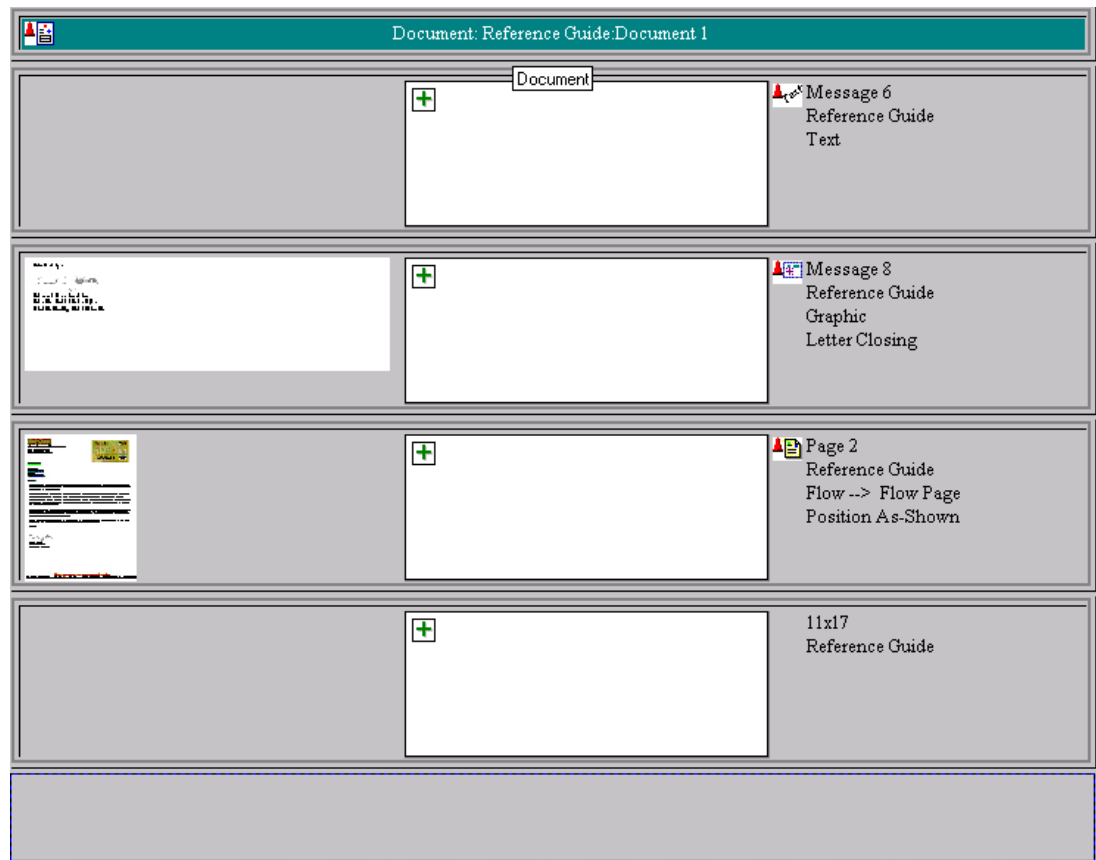
Dialogue includes a many-to-many campaign management process. This means that Dialogue manages the delivery of many different campaigns to many different customers. This requires specialized selection and prioritization of the campaigns. This is critical because it is common for a given customer to qualify for more campaigns than will fit in the envelope. Dialogue allows the application designer to define how campaigns are prioritized.

4.6 Documents

Documents are a collection of related pages. They allow you to arrange the pages according to the order you want them to appear in the document. They can define separate, unique publications within your mailing, perhaps on a particular paper stock. They can contain an arrangement of *campaigns* (or you can mix campaigns in with your other documents).

Documents also have properties that allow you to control whether it starts on a front or back page, and whether you can add marketing messages to the back pages. When you drag a document to the **Edit Panel**, you can control the flow of information from page-to-page in the document. This is the only place where you can view and specify certain document options.

Document in Content Manager Edit Panel

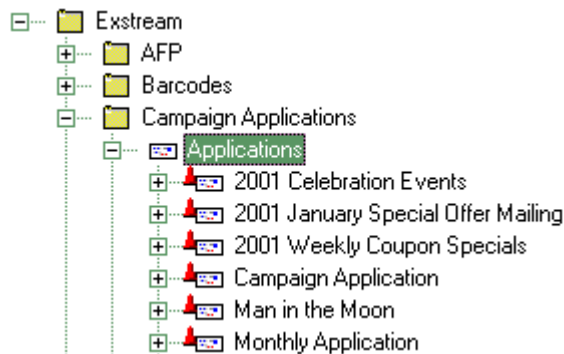


Large Publications

You can use a document as a chapter in a book, to make management of large publications effortless. If you use large publications, you should consider purchasing our **Publication Support Module**. With it in place, you can create indexes, footnotes, and tables of content, as well as control numbering between documents.

4.7 Applications

Applications Heading in Library



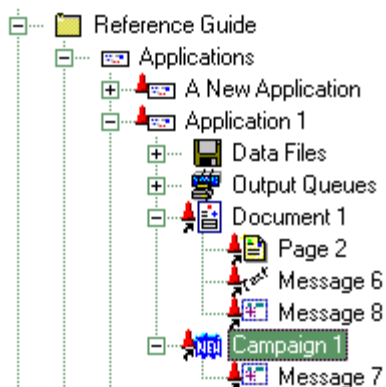
After you have created, designed, and specified the properties for all the communications objects for an Engine run in Dialogue Manager, you must arrange them in an *application*. An application must also contain the data files needed to process customers, and variables either must reside in the application, or be defined as global so that the application can access them.

Properties in applications let you:

- ◆ Define the *customer keys* for reporting and tracking.
- ◆ Control the marketing messages that are added to pages.
- ◆ Control campaigns within the application (if you use campaigns).
- ◆ Define *search keys* for the application.
- ◆ Define *postage breaks* for the application.

NOTE: If you are using the **High Volume Print/Mail Module**, you will see *queues* in the application. Queues give you the ability to split output, control inserters, define multiple printers, and further control the specifics of your application processing. Otherwise, you use printers alone.

Application Contents



Chapter 5: Using the Content Manager Interface

5.1 Starting Content Manager and Logging On

Starting Content Manager

NOTE: In Windows, the full installation program for Dialogue will automatically place the Exstream icon on your desktop.

1. **Double-click** the Exstream.exe icon.
2. When you start Dialogue, the **User Logon** dialog box is displayed.

Starting from the Windows Start Menu

If you have installed components separately, or the icon has been deleted, you can start the Dialogue program from the **Windows Start Menu**.

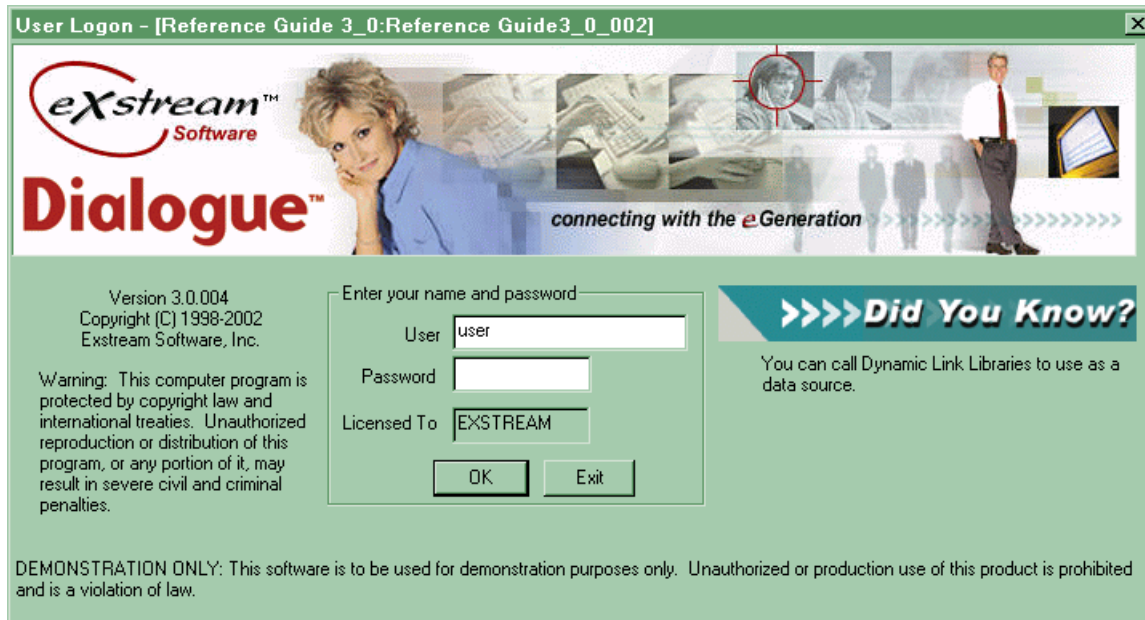
1. Click the **Start** button on your Windows desktop.
2. Select **Programs**, then **Dialogue**, and then **Dialogue Manager**.

TIP: If you do not see the Exstream icon on your desktop, you might want to make it **easier to start** Dialogue. To do this, copy a shortcut to your Windows desktop. Drag the Exstream.exe icon to your desktop. The icon will remain there with a small curved arrow in the lower left corner. From then on, you only have to double-click the icon to start Dialogue. You can do the same with Designer.

IMPORTANT NOTE: Do not attempt to drag files onto the Exstream program icon on your desktop. You must execute the program and you must be properly logged in with a password to be able to run the Dialogue program. This is to protect your system security.

Logging on to Dialogue

User Logon Dialog Box



IMPORTANT NOTE: The **first time** you start Exstream Dialogue, you must be sure the *system administrator* has set you up in the network. If your ID has never been set up in Dialogue, you will receive a message stating that your ID is not authorized. You must then have the *system administrator* set up your user ID, based on your Windows user system ID.

NOTE: Your login screen will have “DEMONSTRATION ONLY” at the bottom of the screen if your system is not enabled for production. This means that you have a demonstration version of Dialogue. Contact your system administrator if you need to be able to run in production.

Login Methods for Dialogue and Databases

Depending on the settings your *system administrator* has chosen, there are different ways to log in to Dialogue. You can consult your *system administrator* to verify which method you should use.

If your system is set up the most common way, the first method is true:

1. **Default Exstream User & Password** – The default user and password for this workstation. The **User Logon** dialog box captures and displays your Windows user id from the network. You do not need to type a password as long as you use your Windows user ID to log on to Dialogue.

However, if you type a different user ID in the user field, you must type a password. Your user ID determines your access to functions and objects. User names are case-insensitive, so that it is easier to match system users with Dialogue users. Dialogue will accept mixed-case user names. See Method #4.

Using the Content Manager Interface

2. **NT Authentication** – This is used for databases configured to use the security built into their NT network. Dialogue connects to the database without specifying a user or password. You will not have to login if your system administrator has chosen this method.
3. **Prompt For User & Password** - The login dialog box prompts for two sets of user names and passwords:

- ◆ First, the **database** user and password are requested.
- ◆ Second, if the database connection is successful, it then prompts for the **Dialogue** user and password.

NOTE: If Dialogue can successfully open the database automatically using the user and password from the prior session, the login dialog will only prompt for the Dialogue user and password.

4. **Database & Dialogue User/Password Identical** - The login dialog box asks for a user and password that are used to login both to the database and to Dialogue.

NOTE: See the next section for information about databases.

Login Messages

If your *system administrator* has set a login message, you may be greeted by a custom message when you log in. If the message tells you the system is locked, the *system administrator* may be performing maintenance on the system. If you see this message, refer to your company's procedures for more information.

5.2 Design Database

Databases and Dialogue

When you work in Dialogue, you are working with objects that are contained in a database. You may be working in a practice database while you learn about Dialogue.

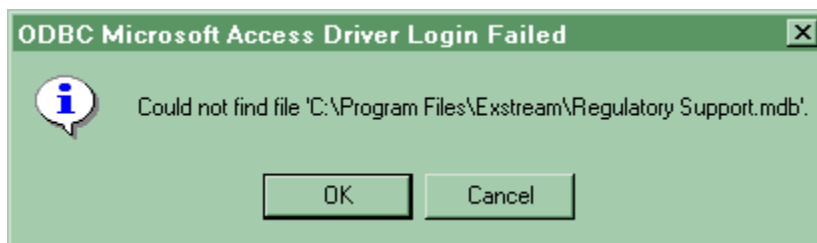
Multiple Databases

Your organization maintains one or more databases that contain customer information. When you login to Dialogue, you may need to switch databases.

Invalid Database

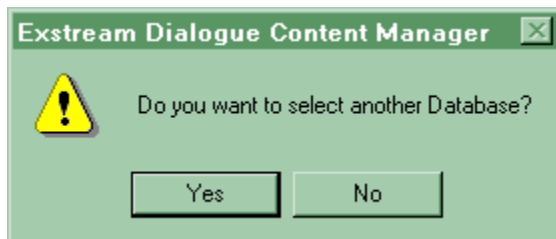
You may see the following error if the database for Dialogue has been moved or deleted. Be sure you do not alter or delete your database. If you cannot find a valid database, contact your *system administrator*.

Could Not Find File Message



If you were last connected to a database that is now invalid, by choosing **Exit** at the login screen you will have a chance to change the database. You will see a message similar to the following figure.

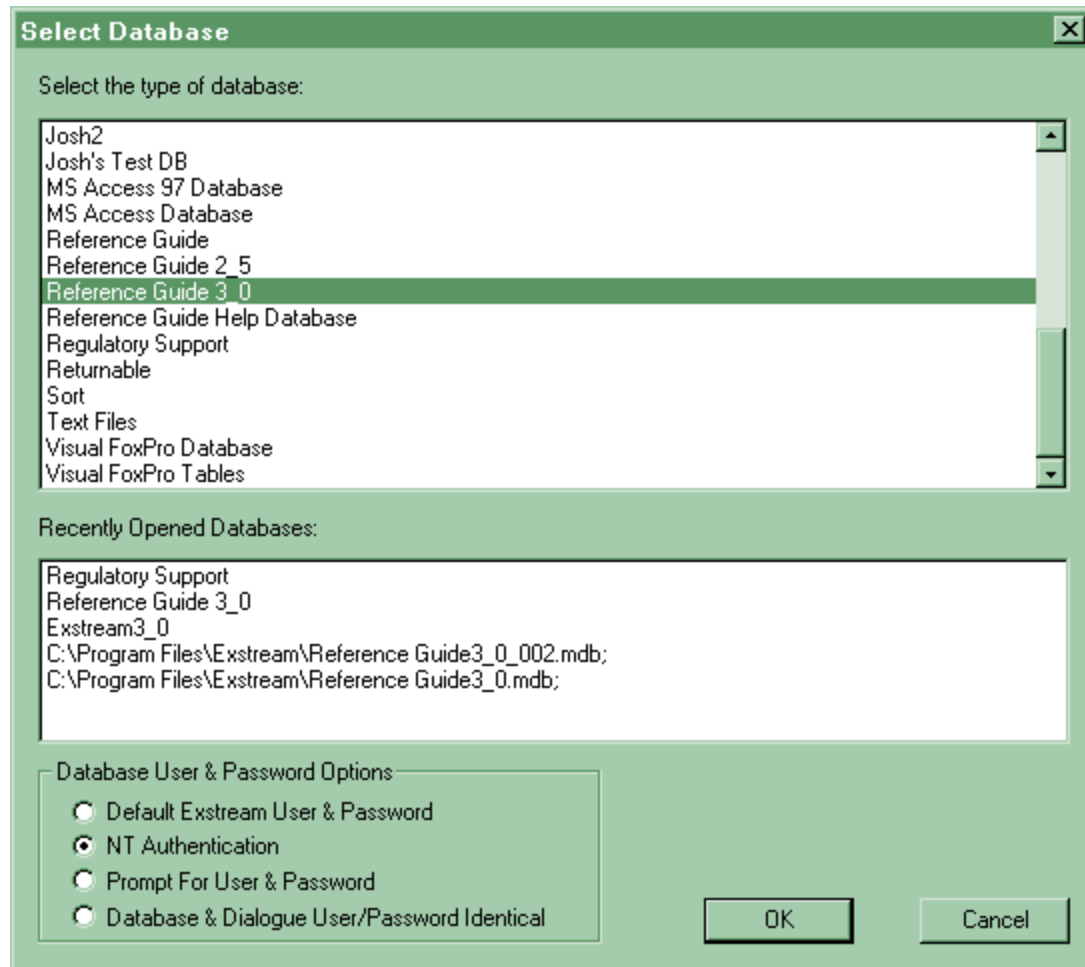
Message



1. Choose **Yes** to go to the **Select Database** dialog box where you can select a different database.

Select Database

Select Database Dialog Box



TIP: You can choose **Change Database** at any time from the **File Menu** while you are working in Content Manager to access this dialog box.

TECHNICAL NOTE: Regarding **Change Database** – when you select this item, you will see a list of ODBC DSN entries. These DSNs (Data Source Names) are entries created in Microsoft Windows that allow you to specify a name for a database file, so that Windows can manage your database connections.

2. **Choose** the database you want to use from the list.

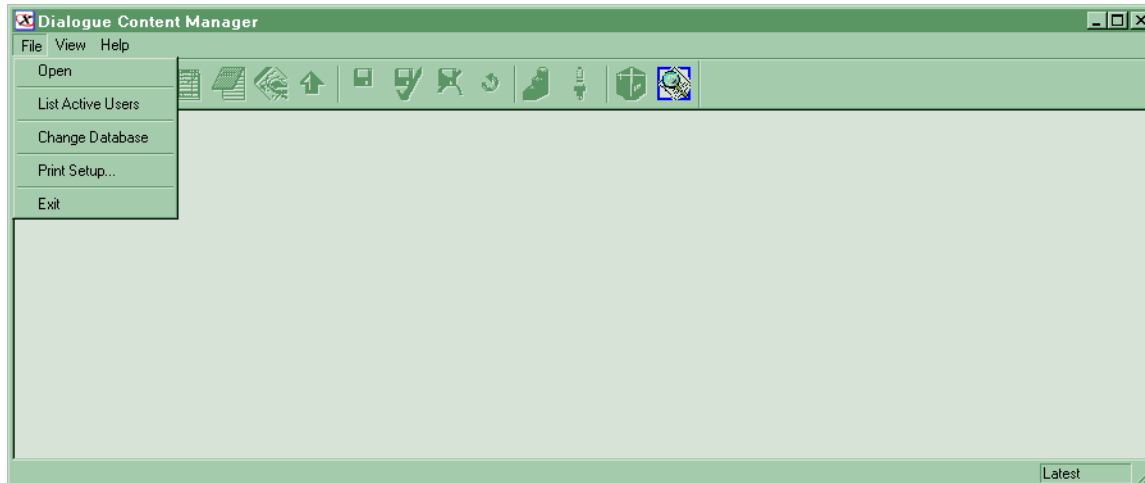
The bottom window shows **Recently Opened Databases**. You can choose easily from this shorter list if you are going to use a database you have opened recently.

3. Click **OK** to exit the dialog box.

Blank Content Manager Window

If you close the window inside Content Manager, the program will remain open, but will not be connected to a database. See the following figure. If you want to open a database from this blank window, choose **Change Database**.

Blank Manager Window



Technical Information about Databases

TECHNICAL NOTE: Dialogue Manager and Dialogue Designer check to verify that the **database version** and software version are the same. If the version numbers are not equal, you will be notified with a message asking you if you want to continue. The database will remain open. If this occurs, you should consult your system administrator for advice. If there has been an upgrade that affects the structure of database, you must update the database to avoid errors. This procedure is normally handled by a system administrator.

TECHNICAL NOTE: On exiting Dialogue, the last DSN used will be saved. When you restart the program the last database connection will be used. Dialogue will verify that you are connected to a valid Exstream database by checking for the “*eversion*” table. Eversion is a table within the DSN that stores the Dialogue release version number. If this table is not found, the connection will be closed.

SYSTEM ADMINISTRATOR: Each time you upgrade to a major new release of the Dialogue program, you should run the *UpdateDB.exe* program located on the workstations in C:\Program Files\Exstream\. Minor upgrades that do not affect the database structure do not require an update. When updating, you should update every database in use on your system. You must use the latest version of UpdatDB.exe and related files that are distributed with the upgrade. See the latest [Reference Guide to Installation and Upgrade](#) for more information.

Using the Content Manager Interface

DATABASE ADMINISTRATOR:

If you are the administrator of the database, a job function that may or may not be separate from the system administrator, be sure to back up your databases on a regular basis.

5.3 Your System Access

The user ID you use to log on to Dialogue determines your system access. The *system administrator* or other person with **Environment Administration** access to the **System Settings** determines it and you cannot override the limitations they have set.

However, you may have reason to fill more than one function in your organization, and may wish to have more than one ID. You can switch your user ID at any time without closing Dialogue. You can also check your user access to determine the functional access you have to the system.

Switching User IDs

You can switch your user ID at any time without closing Dialogue. You may want to do this to change the type of access you have to various functions in the system.

To change your user ID:

1. Click **File**, and then click **User Login**. The **User Logon** dialog box, as shown earlier in the figure is displayed.
2. Type your new user ID in the **User** field.
3. Type the password in the **Password** field.
4. Click **OK**.

Your user ID and access are changed.

Kinds of Access

You can check your *user access* to the system at any time to determine what functions you are allowed to perform. The system administrator grants user access to *users* and *user groups*. User groups are defined by the function you will perform.

Functional Access

There are four types of functional access:

- ♦ **Environmental Administration** - Determines access to the Environment features, including fonts, locales, languages, users and user groups, the print/mail settings, and message setup.
- ♦ **Data Administration** - Determines access to the data dictionary and data files.
- ♦ **Application Design** - Determines access to applications and documents.
- ♦ **Campaign Design** - Determines access to campaigns and messages.

Limited Access

There can be a limitation of access to each set of functions:

- ♦ **View** - Allows you only to view the objects and properties.
- ♦ **Revise** - Allows you to view and edit the objects and properties.
- ♦ **Create** - Allows you to view, edit and create new objects.
- ♦ **Create and Delete** - Allows you to view, edit, create and delete objects.

Departmental Access

You can also be granted access for the following functions according to your department:

- ◆ **Folder Administration** - If this check box is selected, you can create, delete, and control access to folders.
- ◆ **Edit Rules** - If this check box is selected, you can edit targeting and inclusion rules.
- ◆ **Edit Creative** - If this check box is selected, you can modify the graphics and text associated with messages and pages.
- ◆ **Approver** - If this check box is selected, you can approve objects to which you have access.
- ◆ **Compliance** – If this check box is selected, you can edit the Regulatory Support features, if your organization uses Regulatory Support.

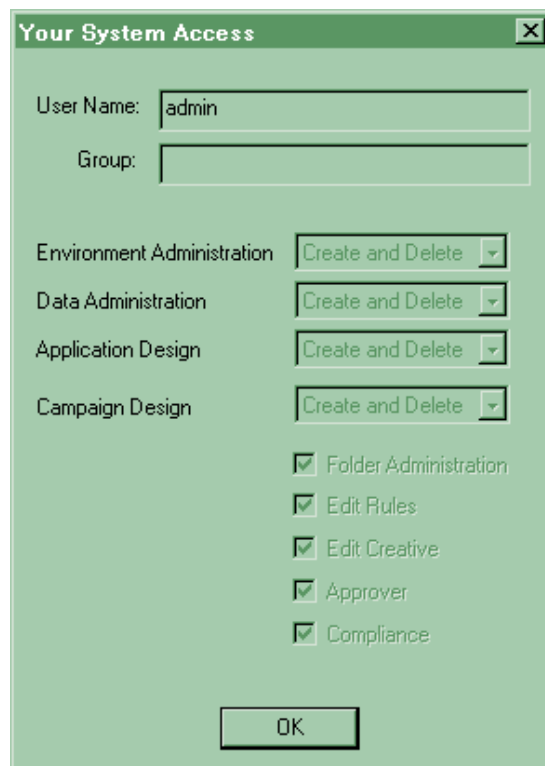
IMPORTANT NOTE: If you do not have **Environment Administration** access to the system, you will not be able to see the **Environment Heading** in the **Library**.

Checking Your User Access

To check your user access:

1. Click **File**.
2. Click **User Access**.
3. The **Your System Access** dialog box is displayed.

Your System Access Dialog Box



Your System Access

User Name:

Group:

Environment Administration

Data Administration

Application Design

Campaign Design

☒ Folder Administration

☒ Edit Rules

☒ Edit Creative

☒ Approver

☒ Compliance

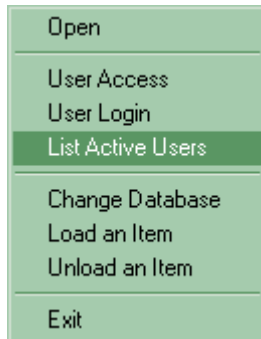
4. Click **OK** when you finish viewing the information.

List Active Users

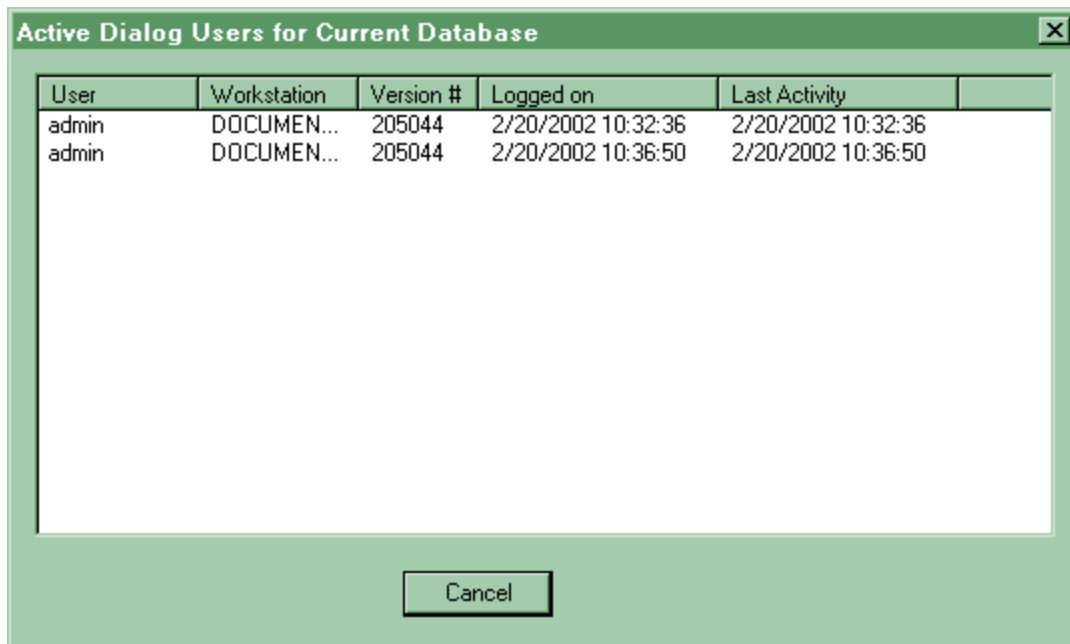
An option under the **File Menu** allows anyone to get a list of all of the users that are currently using Dialogue with the same database you have specified. If you are using a Microsoft Access database, only one user should be logged in at a time in the same database. If more than one user at a time is in the database, you will receive a warning.

You can continue despite the warning if you wish. If you continue after receiving the system warning that another user is currently using the database, you may lose information.

Users Logged In



Active Users



TEHCNICAL NOTE: If, as in the preceding figure, you see that you or another user is logged in twice, it means they are also working with Designer open. If you are logged in multiple times (more than twice), this may indicate a problem with the database. This sometimes occurs when the system exits unexpectedly. Contact your system administrator for instructions. The system administrator may need to cleanse the database.

Multiple Users and Versions of the Software

You or the *system administrator* should be certain that the latest version of the software available in your organization is installed on your workstation. When users simultaneously use different versions of the Dialogue software with the same database, problems can occur.

Dialogue now monitors the versions and ensures that they are consistent. When you log into Dialogue, Dialogue tracks the version and compares it against the versions that have been used previously.

If your version is **lower** than the highest version used by a previous user in a database, then you will be denied access to the system and a message will be generated.

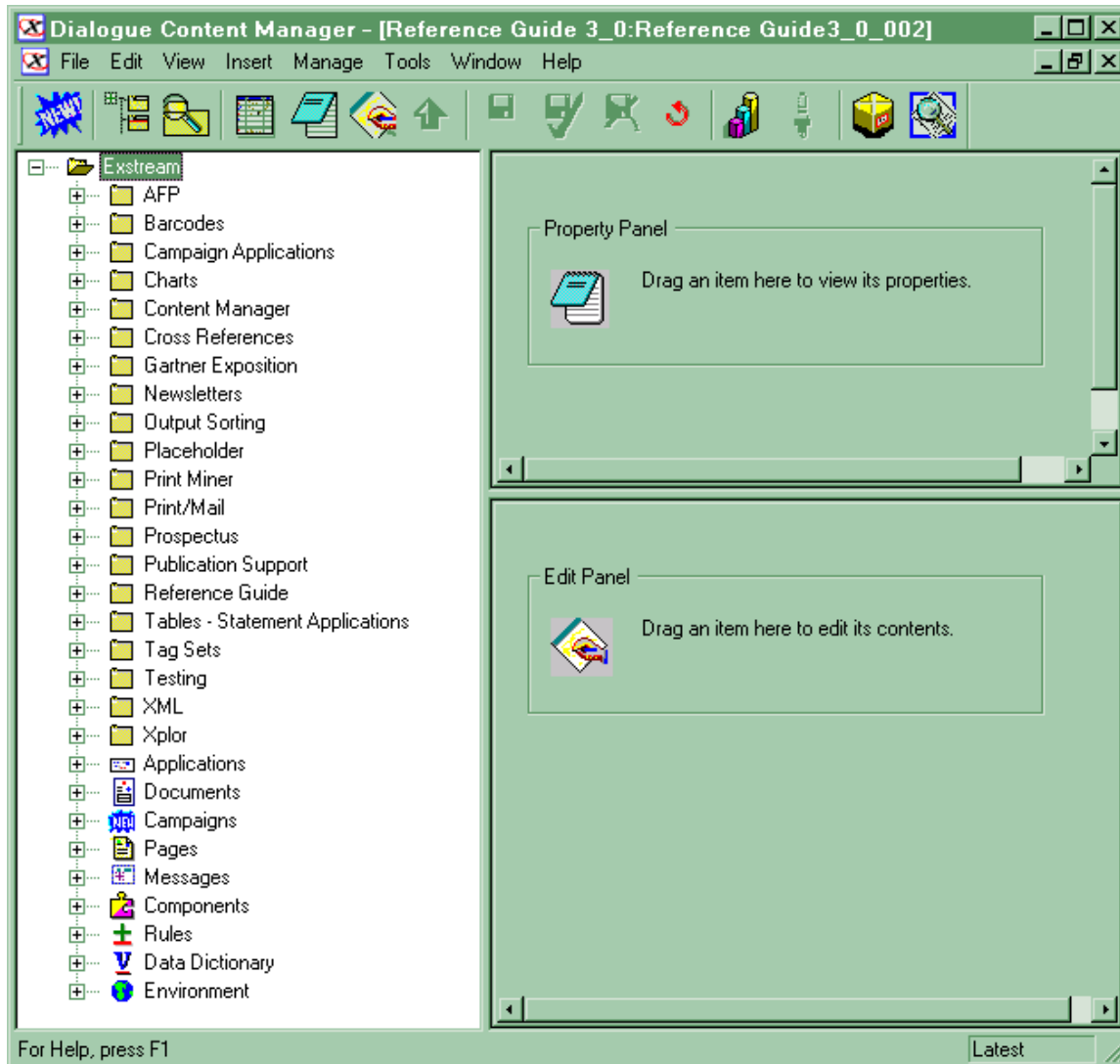
If your version is **higher** than the highest version used by a previous user, you will be warned that you should not use this version until all users have upgraded to the new version.

TECHNICAL NOTE: Exstream Software does not believe that Access should be used as the ODBC system in a multi-user environment. The data should be maintained in SQL Server or Oracle.

5.4 Dialogue Content Manager User Interface

Interface Window

The Dialogue interface window gives you three panels where you can view (the **Library**), specify properties (the **Property Panel**), and edit your objects (the **Edit Panel**).



Dialogue Manager is a customer relationship program that lets you create, target, track, and analyze documents, messages, and campaigns. Dialogue stores all your documents, messages, and campaigns in a Library so you can use them in many instances. The interface window is divided into three parts: the **Library**, the **Property Panel**, and the **Edit Panel**.

The **Library** format makes it easy to edit an object. (Objects are applications, campaigns, messages, pages, documents, frames, templates, the Data Dictionary, and Environment information.) Simply **drag and drop** the object. You can drag an object onto the **Property Panel**

Using the Content Manager Interface

to edit its properties. Drag the same object to the **Edit Panel** to edit the object. If the object is a graphic element (message, page, or template), Dialogue Designer is automatically launched.

Dialogue Designer is a Microsoft Windows-based application that provides all the tools you need to create the text and graphic elements of your documents and campaigns.

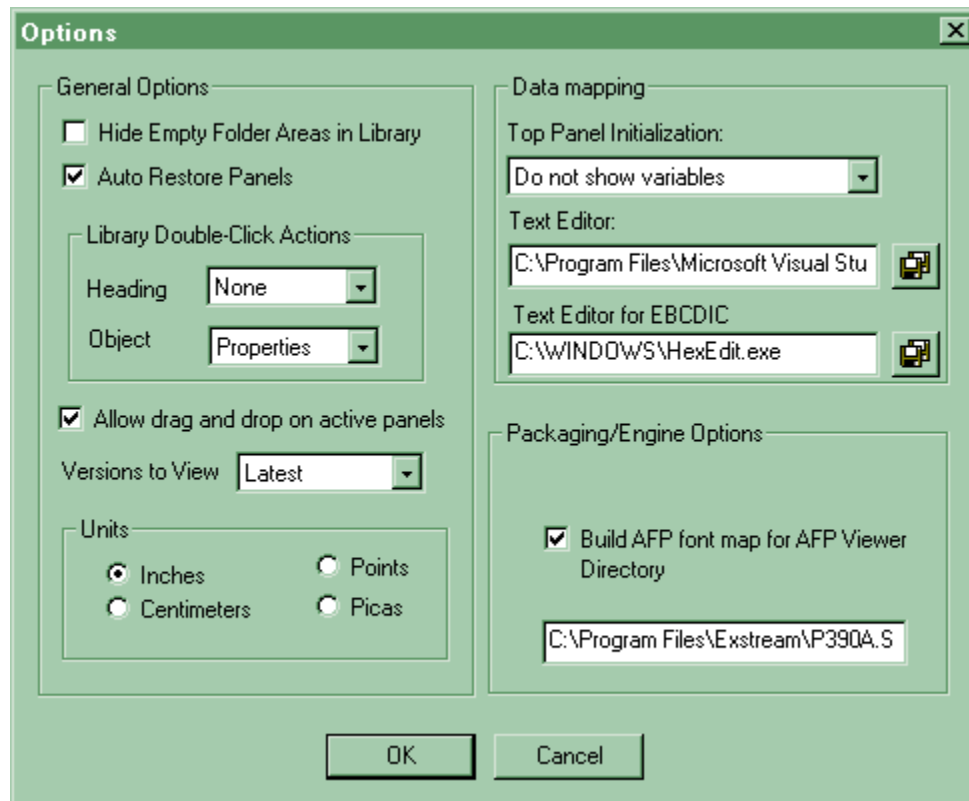
Pop-up Labels

Pop-up labels are a useful feature in Dialogue Manager. Whenever you place your cursor over an object, a label describing it will appear.

Auto Restore Panels

Objects last edited in the **Property Panel** or **Edit Panel** are automatically displayed in the panels the next time you start Dialogue Manager. This user preference is controlled in the **Options** dialog box, **Auto Restore Panels**.

Options Dialog Box



You can display the **Options** dialog box by clicking the **Status Bar** (the bottom border of the Dialogue Content Manager Window).

Settings in the DSN

NOTE: These settings are saved in the user's DSN – Data Source Name, such as Exstream.mdb. DSN is a Microsoft acronym for a **data source name** such as a Microsoft Access database. **Auto Restore** will not apply if you change databases when you start Dialogue Manager the next time.

5.5 Bars on the Dialogue Content Manager Interface Window

Title Bar

The **Title Bar** gives you the name of the program, followed by the name of the DSN and the actual name of the database you are using.



Menu Bar

The **Menu Bar** gives quick access to commands arranged in menus.



Toolbar

The **Toolbar** gives quick access to frequently used commands.



Status Bar

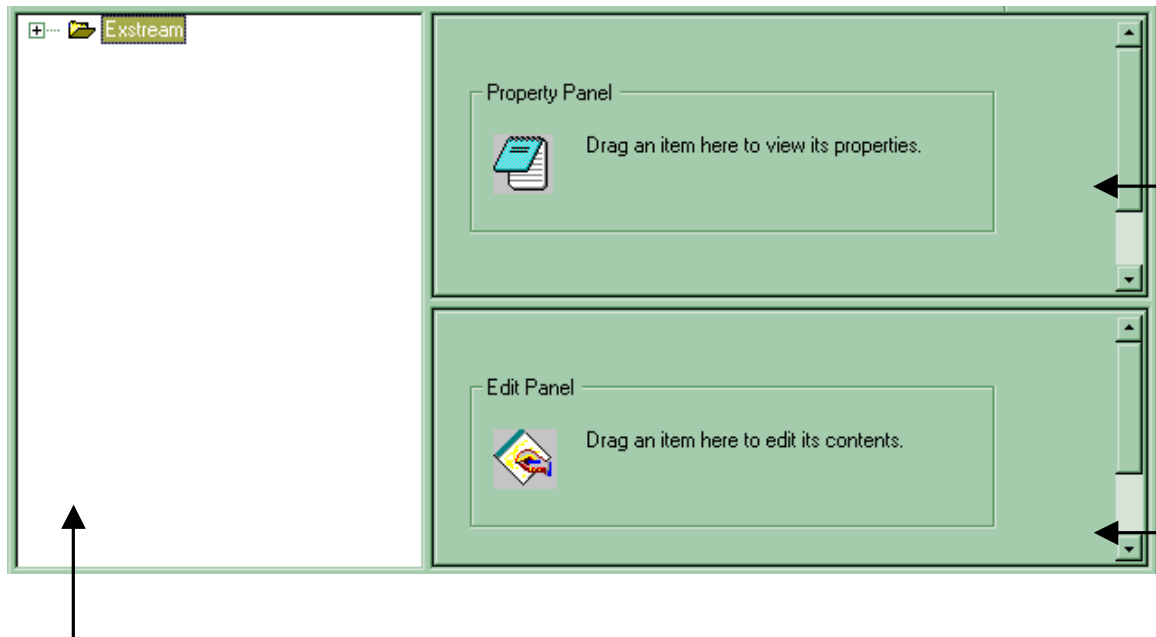
The **Status Bar** displays additional information and help cues on the left. On the right, it displays your **Version to View**. Click the **Status Bar** to view the **Options** dialog box.



5.6 Panels on the Dialogue Content Manager Interface Window

Property Panel

The **Property Panel** contains information about objects. **Drag** an *object* to the **Property Panel**, and then **drop** it. You will see options and information about the *object*.



Library

The **Library** lets you view your *objects* in a tree-like structure. Click the **plus sign (+)** to display items under the headings. When the heading is expanded, click the **minus sign (-)** to collapse the heading and show fewer items.

Edit Panel

The **Edit Panel** shows components of larger objects. When you drag a **designed** object (one that can be changed in Designer), to the **Edit Panel**, Designer is launched.

5.7 General User Functions

This section discusses some common user functions you should know before you begin using Exstream Dialogue.

Resizing the Panels

You can resize any part of the three main sections of the interface (the **Library**, the **Property Panel**, and the **Edit Panel**). To resize one of the sections, place your pointer over the internal border of the panel until it turns into a double bar with arrows on either side (drag bar). Drag the border to the desired location. Dialogue will remember the latest size and layout of the panels the next time you start the program.

Making a Panel Active

Some toolbar buttons, such as the **Save** and **Reset** buttons perform functions for the *active* panel. The active panel is the panel in which you last clicked the pointer. To make a panel active, click anywhere on the panel and then click the toolbar button for the function you want to perform.

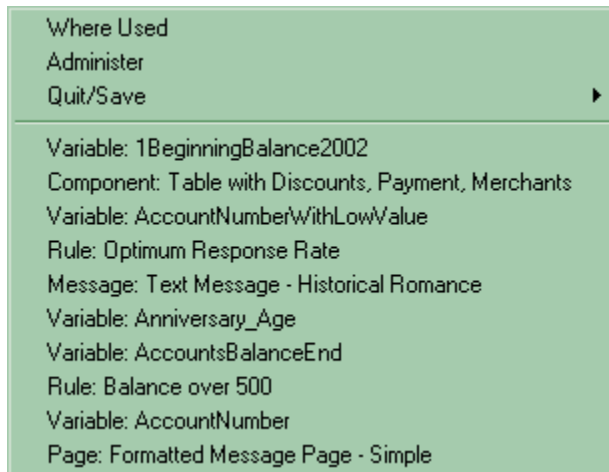
NOTE: The **Property Panel** and the **Edit Panel** cannot be active unless you drag an object or list onto them.

Recent Objects

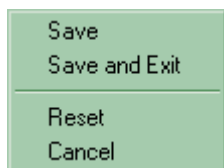
When you right-click in the **Property Panel**, the objects that you have most recently viewed in the **Property Panel** are shown at the bottom of the shortcut menu.

1. **Click** on one of the objects to open it in the Property Panel.

Recent Objects



Quit/Save Submenu



Using the Toolbar

The toolbar is displayed along the top of the window just below the menu bar. It provides quick access to common commands. The following table explains the functions that are available from the tool bar.

Dialogue Manager Toolbar Button Table of Purpose

<i>Button</i>	<i>Function</i>
New Campaign	Lets you create a New Campaign and insert it into the database.
Folder Navigation	Lets you select or view the contents of a folder in the Folder Navigation window.
Filtered Search	Lets you conduct a Filtered Search of the database for items matching certain criteria.
List	Creates a List of the selected object or folder in the Edit Panel .
Properties	Lets you edit the Properties of the selected item in the Property Panel
Edit	Lets you Edit the contents of objects
Submit or Approve	Lets you Submit the selected object for approval or Approve the selected object.
Save	Lets you Save the changes to the active panel.
Save and Exit	Lets you Save and Exit – save changes and close the active panel.
Exit without Saving	Lets you Exit without Saving – close the active panel without saving changes.
Reset	Lets you Reset the properties of the active panel to the last-saved values.
Analyze Campaign	Lets you Analyze the production distribution and response for one or more campaigns.
Test	Lets you compose test data and run a performance Test on an application with all variables, or one specific variable.
Package	Lets you Package the application for production.
Designer	Launches Designer .

These buttons will become a part of your routine with a little practice.

Hiding the Toolbar

To hide the toolbar, click **View**, and then click **Toolbar**. A checkmark next to the Toolbar item means the toolbar is displayed. No checkmark next to the Toolbar item means the toolbar is hidden.

Moving the Toolbar

To move the toolbar, click anywhere around the buttons and drag the toolbar to the new location.


Docking and Floating the Toolbar

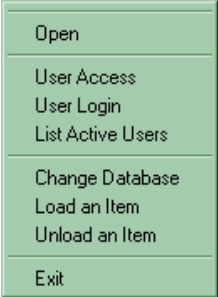
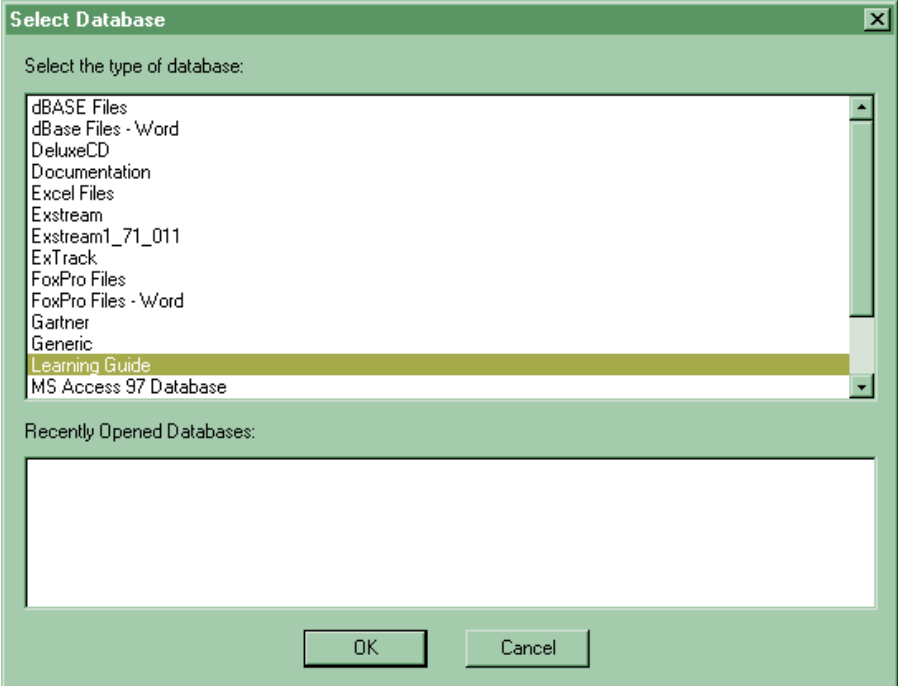
If you drag the toolbar to one of the sides of the window, the toolbar is docked along that edge. If you drag the toolbar onto the window, the toolbar becomes a floating toolbar. If you double-click the title bar of a floating toolbar, it will re-dock automatically. If you double-click around the buttons of a docked toolbar, it will float in its most recent position.

Using the Menu Bar

The **Menu Bar** is just under the **Title Bar** and contains the following menus:

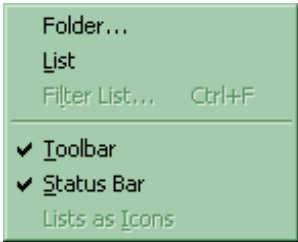
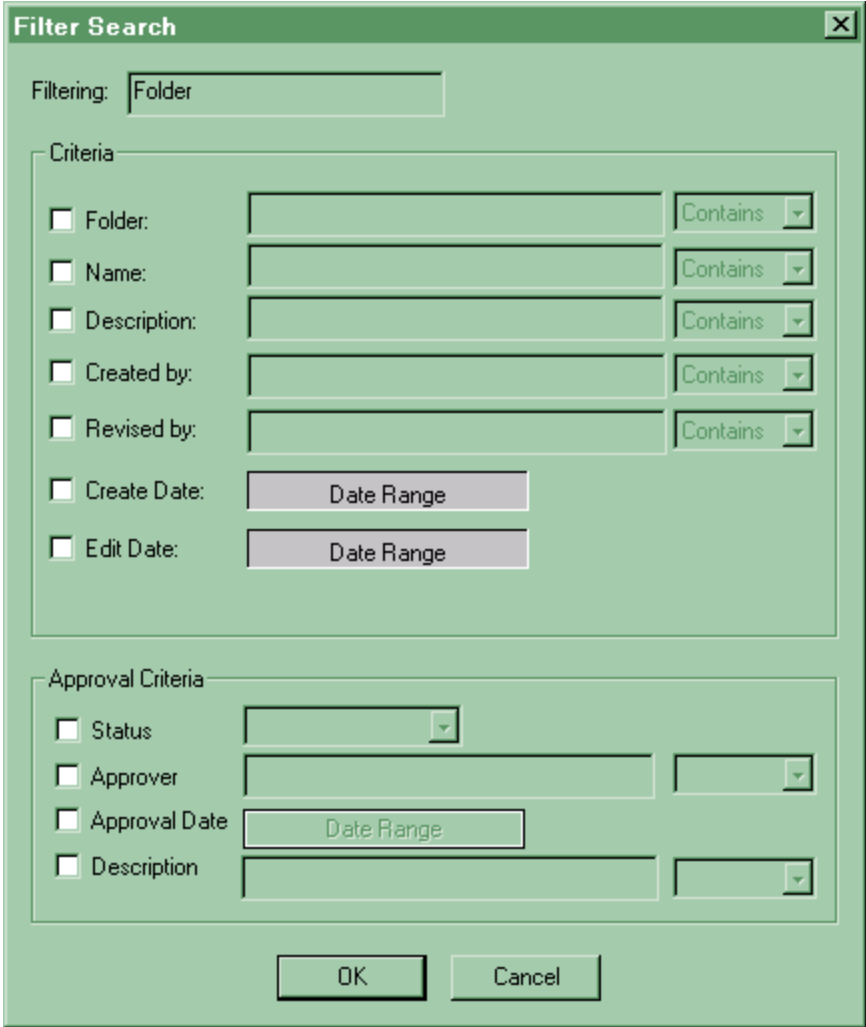
Dialogue Manager Menu Bar Table of Purpose

<i>Menu Item</i>	<i>Function</i>
Exstream Icon	<div><p>Exstream Icon</p><p>The Exstream Icon lets you Restore, Move, Maximize, Minimize, Size, Close, and go to the Next open window in Content Manager.</p></div>





































Menu Item	Function
File	<p>Any dimmed choices are not available for the current object.</p> <p>File Menu</p>  <p>The File Menu contains commands to let you Open a new view of the last opened database, check User Access, change User Login, List the Active Users, Change the Database of objects you are viewing in the Library, Load an Item, Unload an Item, and Exit Dialogue Manager.</p> <p>Change Database</p>  <p>When no object is open in the Designer window, you have the option to change databases. The last five databases you have opened will appear in the Recently Opened Databases window. If you have not opened any yet for the version, no databases will appear until you have opened one.</p> <p>Load and Unload</p> <p>See the explanation of this feature at the end of this table.</p>

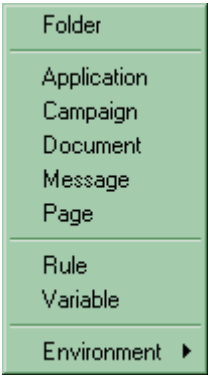
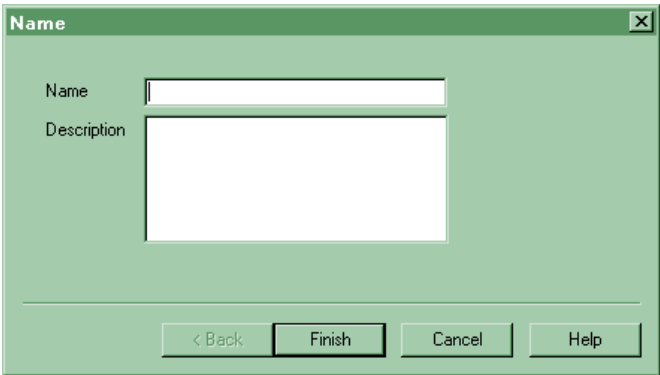

Using the Content Manager Interface

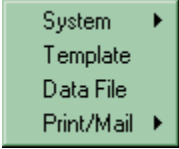


<i>Menu Item</i>	<i>Function</i>																								
Edit	<div><div><div>Edit Menu</div><div><table><tr><td>Properties</td><td>Ctrl+P</td></tr><tr><td>Contents</td><td>Ctrl+E</td></tr><tr><td>Rename</td><td>Ctrl+R</td></tr><tr><td>Delete</td><td>Ctrl+DEL</td></tr><tr><td>Clone</td><td></td></tr><tr><td colspan="2">Save Changes</td></tr><tr><td colspan="2">Save and Close</td></tr><tr><td colspan="2">Close</td></tr><tr><td>Refresh</td><td>F5</td></tr><tr><td colspan="2">Cut</td></tr><tr><td>Copy</td><td>Ctrl+C</td></tr><tr><td>Paste</td><td>Ctrl+V</td></tr></table></div></div><div><p>The Edit Menu contains commands to let you edit object Properties, edit object Contents, Rename objects, Delete objects, and Clone objects. It also contains Save Changes, Save and Close, Close, and Refresh commands. Other commands are Cut, Copy, and Paste.</p></div></div>	Properties	Ctrl+P	Contents	Ctrl+E	Rename	Ctrl+R	Delete	Ctrl+DEL	Clone		Save Changes		Save and Close		Close		Refresh	F5	Cut		Copy	Ctrl+C	Paste	Ctrl+V
Properties	Ctrl+P																								
Contents	Ctrl+E																								
Rename	Ctrl+R																								
Delete	Ctrl+DEL																								
Clone																									
Save Changes																									
Save and Close																									
Close																									
Refresh	F5																								
Cut																									
Copy	Ctrl+C																								
Paste	Ctrl+V																								


Menu Item	Function
View	<p data-bbox="412 260 545 285">View Menu</p> <div data-bbox="412 302 708 541">  </div> <p data-bbox="756 268 1312 298">The View Menu contains commands to let you:</p> <ul data-bbox="756 310 1312 604" style="list-style-type: none"> ◆ Access the Folder Navigation window ◆ View a List of the selected heading items ◆ Filter a List when it is active in the Property Panel or Edit Panel. This brings up the Filter Search dialog box where you can make choices to filter your list. Select the check box for any field that you want to filter. Then choose the criteria to apply. See the following figure. <p data-bbox="412 609 565 634">Filter Search</p> <div data-bbox="412 655 1273 1675">  </div> <p data-bbox="412 1688 574 1713">You can also:</p> <ul data-bbox="412 1726 821 1837" style="list-style-type: none"> ◆ Display or hide the Toolbar ◆ Display or hide the Status Bar ◆ Display the Lists as Icons.

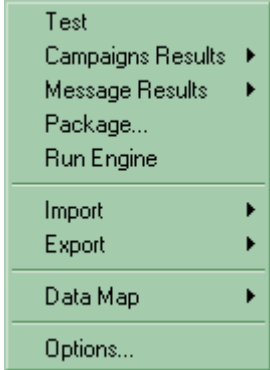
Using the Content Manager Interface

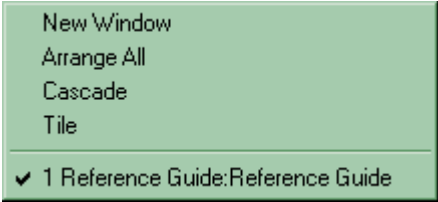
Menu Item	Function																																																																																
	<div>List View in Property Panel</div> <table><tr><th>Folder</th><th>Reference Guide</th><th>Description</th><th>Folder</th><th>Version</th><th>Status</th><th>Last Modified</th><th>Modified By</th></tr><tr><td></td><td>A New Application</td><td>This is a new application</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>February 13, 2002 09:31:14</td><td>eburnley</td></tr><tr><td></td><td>Application 1</td><td>RGBDC</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>December 7, 2001 10:53:56</td><td>eburnley</td></tr><tr><td></td><td>Application 2a</td><td>RGBDC</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>February 27, 2001 12:39:40</td><td>eburnley</td></tr><tr><td></td><td>Application 6a</td><td>RGBDC</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>December 4, 2001 14:56:46</td><td>eburnley</td></tr><tr><td></td><td>Application 6-string text</td><td>RGBDC</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>March 14, 2001 10:31:50</td><td>eburnley</td></tr><tr><td></td><td>Basic Document Compo...</td><td>Testing</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>February 15, 2001 12:37:15</td><td>eburnley</td></tr><tr><td></td><td>Message Symbolics App...</td><td></td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>March 8, 2000 14:56:33</td><td>eburnley</td></tr><tr><td></td><td>Primary Application</td><td>Base application for ou...</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>March 7, 2000 13:22:40</td><td>eburnley</td></tr><tr><td></td><td>Version 2.0 Text Mess. ...</td><td>Testing</td><td>Reference Guide</td><td>1</td><td>InProcess</td><td>December 4, 2001 14:47:56</td><td>eburnley</td></tr></table> <div>Icons</div> <div> A New Application  Application 1  Application 2a  Application 6a  Application 6-string text  Basic Document Composition  Message Symbolics Application  Primary Application  Version 2.0 Text Mess. Applic-drawing object rules</div> <div>The list options are only available when you have a heading selected that can contain a list of objects.</div>	Folder	Reference Guide	Description	Folder	Version	Status	Last Modified	Modified By		A New Application	This is a new application	Reference Guide	1	InProcess	February 13, 2002 09:31:14	eburnley		Application 1	RGBDC	Reference Guide	1	InProcess	December 7, 2001 10:53:56	eburnley		Application 2a	RGBDC	Reference Guide	1	InProcess	February 27, 2001 12:39:40	eburnley		Application 6a	RGBDC	Reference Guide	1	InProcess	December 4, 2001 14:56:46	eburnley		Application 6-string text	RGBDC	Reference Guide	1	InProcess	March 14, 2001 10:31:50	eburnley		Basic Document Compo...	Testing	Reference Guide	1	InProcess	February 15, 2001 12:37:15	eburnley		Message Symbolics App...		Reference Guide	1	InProcess	March 8, 2000 14:56:33	eburnley		Primary Application	Base application for ou...	Reference Guide	1	InProcess	March 7, 2000 13:22:40	eburnley		Version 2.0 Text Mess. ...	Testing	Reference Guide	1	InProcess	December 4, 2001 14:47:56	eburnley
Folder	Reference Guide	Description	Folder	Version	Status	Last Modified	Modified By																																																																										
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	Application 6a	RGBDC	Reference Guide	1	InProcess	December 4, 2001 14:56:46	eburnley																																																																										
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	Primary Application	Base application for ou...	Reference Guide	1	InProcess	March 7, 2000 13:22:40	eburnley																																																																										
	Version 2.0 Text Mess. ...	Testing	Reference Guide	1	InProcess	December 4, 2001 14:47:56	eburnley																																																																										

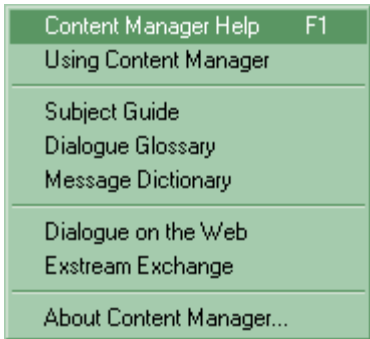
Menu Item	Function
Insert	<p data-bbox="412 258 553 285">Insert Menu</p> <div data-bbox="412 302 618 674">  <p>The Insert Menu contains options to let you insert new items in the <i>Library</i> and insert new items in the current object.</p> <p>All of the options except Environment bring up the Name dialog box where you can create a new object.</p> </div> <p data-bbox="412 699 618 726">Name Dialog Box</p> <div data-bbox="412 743 1068 1115">  </div> <p data-bbox="412 1171 1268 1199">If you have permission, you can also add new items under Environment.</p> <p data-bbox="412 1224 646 1251">Environment Option</p> <div data-bbox="412 1283 618 1654">  </div>

<i>Menu Item</i>	<i>Function</i>
	<p>Environment Submenu Options</p>  <ul style="list-style-type: none"> ◆ System brings up another submenu. ◆ Template brings up the Name dialog box where you can create a new object. ◆ Data File brings up the Add New Input File dialog box where you can create a new data file. ◆ Print/Mail brings up another submenu. <p>System Options</p>  <p>The System options let you create a new Font, Locale, Language, Style, Style Sheet, Tag Set, Message Type, Paper Type, User, or User Group. These features work like creating a new object from the object heading.</p> <p>Print/Mail Options</p>  <p>The Print/Mail options let you create a new Output Queue, Inserter, Printer, Banner Page, Barcode, or Multiple-Up Sheet. These features work like creating a new object from the object heading.</p>

Menu Item	Function
Manage	<p>The Manage Menu gives you the available choices for versions of the object in the Property Panel.</p> <p>Manage Menu</p>  <p>Version change choices are:</p> <ul style="list-style-type: none"> ◆ Submit for Approval ◆ Cancel Submission ◆ Approve ◆ Unapprove ◆ Make Work-in-Process <ul style="list-style-type: none"> ◆ History displays the past versions of the current object in the Edit Panel. ◆ Jurisdictional Effectivity displays the jurisdictions for the selected object in the Edit Panel. ◆ Where-Used displays all of the objects that use the selected object in the Edit Panel.

Menu Item	Function
Tools	<p>Tools Menu</p>  <p>The Tools Menu contains commands to let you:</p> <ul style="list-style-type: none"> ♦ Test the data dictionary, campaigns, and applications. ♦ View Campaign Results ♦ View Message Results ♦ Package an application ♦ Run the Engine <p>NOTE: Packaging and Running the Engine are features explained in the book, Reference Guide to Basic Document Composition.</p> <ul style="list-style-type: none"> ♦ Import - Objects or a COBOL Copybook ♦ Export - Objects or a COBOL Copybook ♦ Work with the Data Map (data mapping) of a data file. <p>NOTE: Data Mapping is a complex topic explained in the book, Reference Guide to Variables, Data Files, and Data Mapping.</p> <ul style="list-style-type: none"> ♦ Set general user Options, such as: interface views, units of measurement, display of revisions, settings for pointer options, and the default editor programs for Dialogue.

Menu Item	Function
Window	<p>The Window Menu contains commands to let you:</p> <ul style="list-style-type: none">◆ Open a New Window or view◆ Arrange All the open windows◆ Cascade the windows◆ Tile the windows <p>It also displays a list of open windows that you can use to move between windows. Click on a name in the list to go to the respective window.</p> <p>Window Menu</p> 

Menu Item	Function
Help	<p>Help Menu</p>  <p>The Help Menu contains:</p> <ul style="list-style-type: none"> ◆ Content Manager Help takes you to this set of books where you can use the Acrobat Search function – the icon that looks like a pair of binoculars in front of a page – to search across all of these books. Click the icon and type a keyword. The most relevant choice appears at the top of the list. Click that item, and you will be taken to the first occurrence of the keyword, and successively to the next occurrences. ◆ The Using Content Manager option takes you to this book. ◆ The Subject Guide gives you information about the contents of each of the books in this set of <i>Reference Guides</i>. This is valuable when you want find information about an object or process, and read or scan all of the available information on that topic. ◆ The Dialogue Glossary option takes you to the glossary where you can look up a word found in the documents or on the software interface. It contains general computing terms and terms that are specific to Dialogue. ◆ The Message Dictionary allows you to look up error messages and their meaning by number. ◆ Dialogue on the Web is a link to our website, http://www.exstream.com/. ◆ Exstream Exchange is a knowledgebase of information and tips about how to use Dialogue. You can enter a keyword to search the database. These facts have been entered by users of the software, as well as professionals at Exstream. ◆ The About Content Manager information for the version of Dialogue Manager you are using

5.8 Menu Specifications and Use

To select a command from a **menu**, click on the menu name to display the menu, then select the command. For example, to exit Dialogue Manager, on the **File** menu, click **Exit**.

Some menu commands contain **fly-out menus**. An arrow next to the menu command indicates a fly-out menu. When you select a menu command with an arrow next to it, a submenu is displayed. Select the command you want from the submenu.

Some menus also lead to a **dialog box**. These options are indicated by an ellipsis (...). To access the dialog box, click the item and the dialog box will appear.

Some menu commands **toggle** options on and off. Toggle means that when you select the command once, it turns the option on. To turn the option off, select it again. A checkmark next to the menu command indicates that the option is turned on. No checkmark indicates that the option is turned off.

5.9 Setting Options for Dialogue Content Manager

Options Dialog Box

You can set some basic options before you begin using Dialogue.

You can:

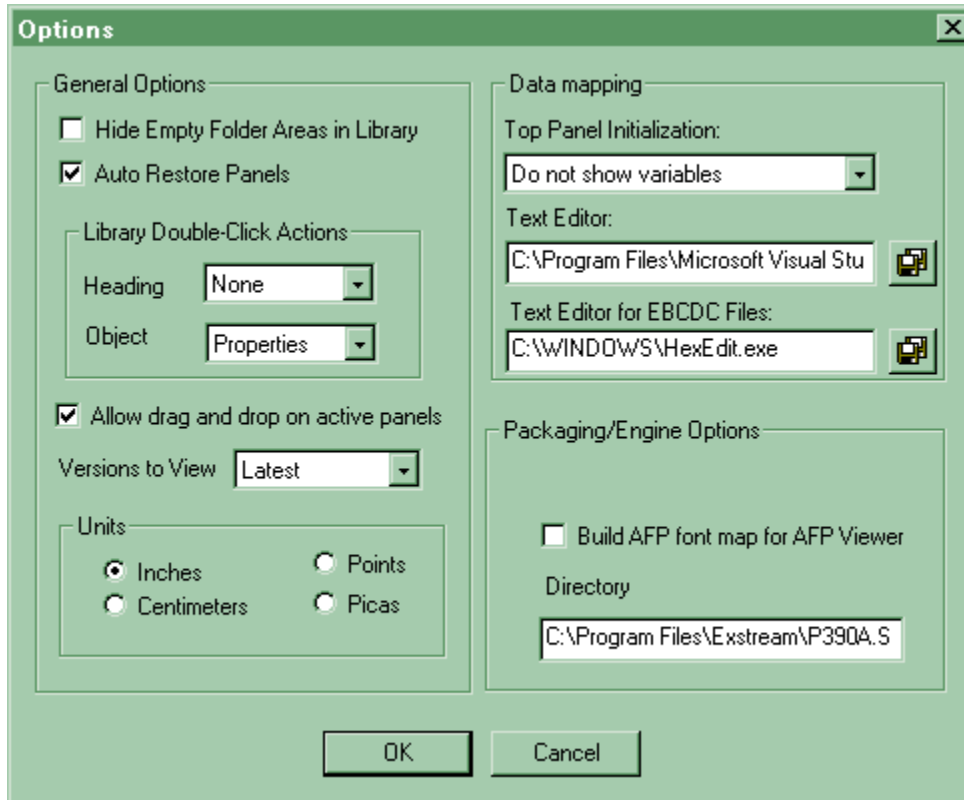
- ◆ Select whether to hide empty **Folder Areas (Headings)**.
- ◆ Select whether to **Auto Restore Panels**, in other words, have Dialogue remember how panels looked the last time they were closed.
- ◆ Determine the action for **Double-Click** on headings and objects in the *Library* tree.
- ◆ Select whether to allow the user to **drop** objects on active panels.
- ◆ Select the **Versions** of objects you want to view.
- ◆ Select the **Units** of measure you want to use.
- ◆ Set options for **Data Mapping**.
- ◆ Set options for **Packaging**.

Defining Options

To define options for Dialogue Content Manager:

1. Click **Tools**, and then click **Options**; or click the **Status Bar** (the bottom bar at the bottom of your interface screen) to display the **Options** dialog box, as shown in the following figure.

Options Dialog Box



General Options Area

Hide Empty Folder Areas in Library

1. Do one of the following:
 - ◆ Select the **Hide Empty Folder Areas in Library** check box to display only folder areas that contain data.
 - ◆ Clear the **Hide Empty Folder Areas in Library** check box to display all folders whether they contain data or not.

NOTE: **Library** headings are considered folders. If, for example, you do not have any *campaigns* or *pages* in a particular application and you selected the **Hide Empty Folder Areas** check box, the **Campaigns Heading** or **Pages Heading** would not be shown.

IMPORTANT NOTE: If your organization has not purchased the **Campaign Management Module**, you will not see campaigns in the **Library**. Likewise, other options such as **Print/Mail** objects will not appear if you have not purchased the options.

Auto Restore Panels

2. Do one of the following:
 - ◆ Select the **Auto Restore Panels** check box to have Dialogue remember the last tab of the **Property Panel** that was used in closing.
 - ◆ Clear the **Auto Restore Panels** check box to have Dialogue open the first tab of the **Property Panel** when an object is opened in it.

Library Double-Click Actions

3. From the **Library Double-Click Actions** area, select one of the following from the **Heading** drop-down list:
 - ◆ **None** - if you do not want to display the contents of the heading in the **Edit Panel** when you double-click on it.
 - ◆ **List** - to display the contents of the heading in the **Edit Panel** when you double-click on the heading.

NOTE: When a heading is “edited,” by dragging it to the **Edit Panel**, it only shows a detailed list of its contents. You cannot edit the *properties* of a heading.

4. From the **Library Double-Click Actions** area, select one of the following from the **Object** drop-down list:
 - ◆ **None** - if you do not want to display the object in the **Property Panel** or **Edit Panel** when you double-click on it.
 - ◆ **Properties** - to display the object in the **Property Panel** when you double-click on an object.
 - ◆ **Edit** - to open the object in the **Edit Panel** when you double-click on it.

NOTE: Some users like to improve productivity by enabling double-click. Other users sometimes double-click by mistake and do not want to initiate an action.

Allow Drag and Drop on Active Panels

5. Do one of the following:

- ◆ Select the **Allow drag and drop on active panels** if you want to drop objects on the **Property Panel** while a previous object is still occupying that panel. *Changes are saved in the exiting object with each new drop.*

You can drag another object onto the **Edit Panel**, if it is one that opens in Designer. However, if there is already an object displayed in the **Edit Panel**, such as a campaign or document, you should **Exit** or **Save and Exit** that object before you drag another object onto the **Edit Panel**.

Remember, some objects open in Designer when you drag them to the **Edit Panel**. The object in Designer should be saved and closed if you have made changes to it. Then you can go to Manager, and drag a new object to the **Edit Panel** that will replace the first object in Designer. Be careful not to save objects in Designer, and then save the object in Manager, as your changes will be overwritten.

- ◆ Clear the **Allow drag and drop on active panels** if you do not want to be able to drag objects onto the **Property** or **Edit Panel**. In this case, you must close the open panels before you can drag other objects onto them.

Versions to View

6. Select one of the following from the **Versions to View** drop-down list:

- ◆ **Latest** – to view only the latest versions of all objects.
- ◆ **Approved** – to view only approved versions of all objects.
- ◆ **Submitted** – to view only objects that have been submitted for approval.
- ◆ **In Process** – to view only objects that are in process.
- ◆ **Archive** – to view only the newest archive versions of all objects. You can use the **History** menu option to view other archived versions.

IMPORTANT NOTE: Dialogue always starts the program in the same *version* that you were in when you previously quit using the program. If you start the program and do not see the items on the tree that you expect, verify that you are in the desired *version view*.

NOTE: Your system is placed in read-only mode if your version view is:

Submitted, in which case your version view will show only objects submitted for approval. If a submitted campaign contains a message that is not submitted, the message can be changed. It is not in read-only mode.

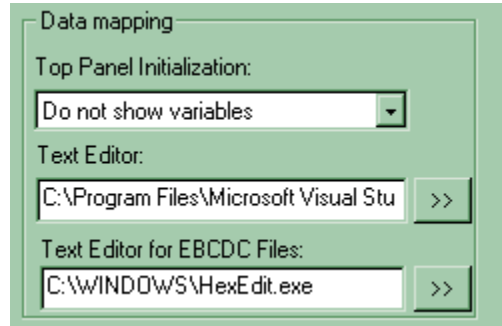
Archive, in which case the object is considered to be in final form. You cannot edit objects while in read-only mode.

Units

7. From the **Units** area, select **Inches**, **Centimeters**, **Points**, or **Picas** to set your units of measure. All measurements will be displayed in the selected units.

Data Mapping Options

Data Mapping Options

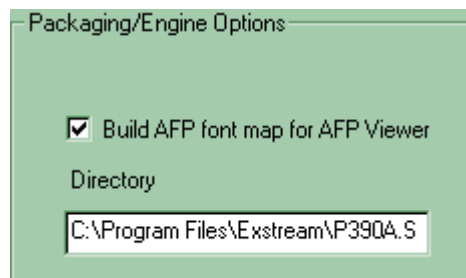


8. Under **Top Panel Initialization** choose one of the following options for showing information about a data file when you drag it to the **Edit Panel** for mapping:
 - ◆ Do not show variables to leave the Property Panel clear.
 - ◆ **Show data dictionary** to automatically show the entire data dictionary in detail in the **Property Panel**.
 - ◆ **Show data layouts** to automatically show the data layout in the **Property Panel**.
9. Under **Text Editor**, type the path to the text-editing program you use to edit your data files. By default, Dialogue assumes that you are using Windows 98-2000 and Notepad as your editor because it comes bundled with the Windows operating system. You can also use the **double-arrow** button to browse for the text editor file. You must specify the complete path. If you have an incorrect path here, you will get an error message when you open or exit the **Options** dialog box.
10. Under **Text Editor for EBCDIC Files**, type the path to the text-editing program you use to edit your data files if they are in EBCDIC format. This text editor will be launched automatically when you click the >> button in the data file properties, if Dialogue detects that you are editing an EBCDIC file. One such editor is Hex Edit. You can also use the **double-arrow** button to browse for the text editor file. You must specify the complete path.

TIP: You will learn about data terminology and more about data mapping in the [Reference Guide to Variables, Data Files, and Data Mapping](#).

Packaging/Engine Options

Packaging/Engine Options



11. In the Packaging/Engine Options area, you can choose to Build AFP font map for AFP Viewer by selecting the check box. The default setting is on.

Or, you can clear the check box to avoid building this file.

12. Specify the directory where the AFP font map file will be sent by typing the path in the **Directory** text box. See the preceding figure for the default setting. You may need to ask your *system administrator* if you should specify that this file is on your mainframe.
13. Click **OK**.

Your options are set and used whenever you log into Dialogue. You can change these options at any time.

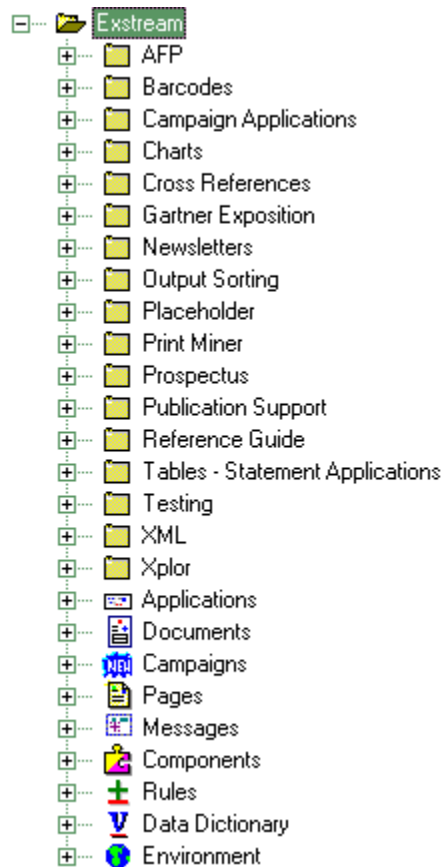
5.10 Viewing the Library

Folders and Headings

The **Library**, shown in the following figure, is organized into folders and headings, similar to Microsoft Windows Explorer. You create and use folders to organize your information just as you would store information in folders in a filing cabinet. When you create a new folder, all of the headings for objects will automatically appear under the folder. Any of these folders that you create can be called a working folder.

The headings contain *objects*. For example, all campaigns are listed in the **Campaigns Heading**. Folders and headings that contain information have a **plus sign (+)** displayed next to them. To view the contents of a folder or heading, click on the plus sign. The folder or heading opens and a **minus sign (-)** is displayed next to it.

Library



Subfolders

Folders can contain **subfolders**. For example, you could create a general folder for the Marketing department of your organization and each specific project could have a subfolder in the Marketing folder.

Home Folder

The **home folder** is the starting folder for the group to which you belong. You will open this folder when you start Dialogue Manager. You can select this folder at any time by clicking the **Home** button on the **Folder Navigation** dialog box while you have the folder you want to use selected. The **Folder Navigation** dialog box is described later in this chapter.

IMPORTANT NOTE: Your *system administrator* sets your *user access* and the *user groups* to which you belong, and can set properties for the **root folder** that can affect the access for all users.

Viewing Folders

You can only view folders and the contents of folders to which you have **access**. The user groups you are in determine your user access. The *system administrator* sets your *access rights*. Folders with red lines through them are designated as read-only access to you. There is also a small key symbol next to them to show that they are locked.

For example, the “Business” and “Marketing” folders that are shown in the figure below are displayed with a red line through them indicating that you do not have read/write access to those folders. You can only *view* the contents of folders to which you have *read only* access.

Folder Access



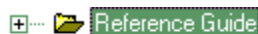
Viewing the Library

Now that you know how information in the **Library** is organized, here are ways to view the **Library**.

You can view:

- ◆ Only one folder
- ◆ Folder, plus objects in that folder
- ◆ All the folders at once
- ◆ All Folders, all the objects in the root directory, plus the rest of the objects in the tree you have opened.

One Folder Only

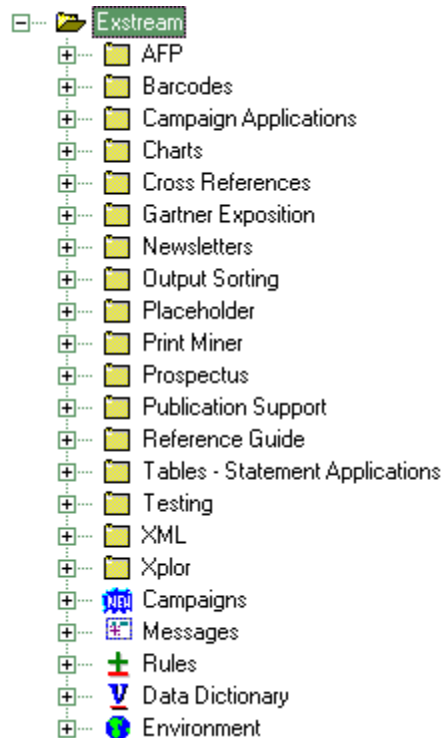


Folder Plus Objects in that Folder

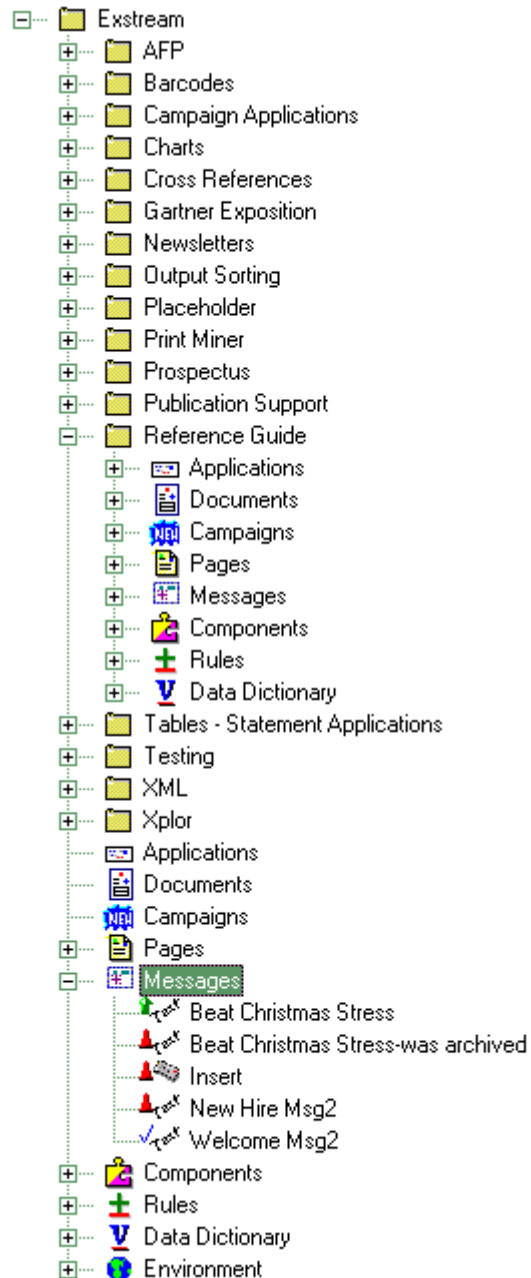


Using the Content Manager Interface

All Folders



Folders, Objects, and Opened Objects



Changing Your View of Folders

This section explains how to open and close a folder and move up and down a folder tree. There are two ways to change your view of the *Library*.

You can:

- ◆ Click on the plus (+) and minus (-) signs next to the folders that are shown in the tree to navigate up and down the folder tree.
- ◆ Use the **Folder** button to limit the folders displayed.

Opening and Closing a Folder

To open a folder and display its contents, click on the **plus sign (+)** next to it. When a folder is open, a **minus sign (-)** is displayed next to it. Click on the **minus sign** to close the folder.

Moving Up the Folder Tree

If the folder you are viewing is contained in another folder, you can click on the **minus sign (-)** to move up the folder tree. You can do this one level at a time. You can also just move your pointer to a new location in the **Library**.

Moving Down the Folder Tree

If the folder you are viewing contains other folders, you can click on the **plus sign (+)** to open the folder and display the contents of the folder.

Double-Clicking the Folder Objects

The action that occurs when you double-click an object in the **Library** is controlled in the **Options** dialog box.

For a **Heading**, the action can be set to **None**, or **List**. The **List** setting will give you a list of all the objects under the heading in the **Edit Panel**.

For an **Object**, the action can be set to **None**, **Properties**, or **Edit**. The **Properties** setting will open the object in the **Property Panel**. The **Edit** setting will open the object in the **Edit Panel**. If the object is a graphic object, Designer will be launched.

Using the Folder Navigation Command to Change Your View

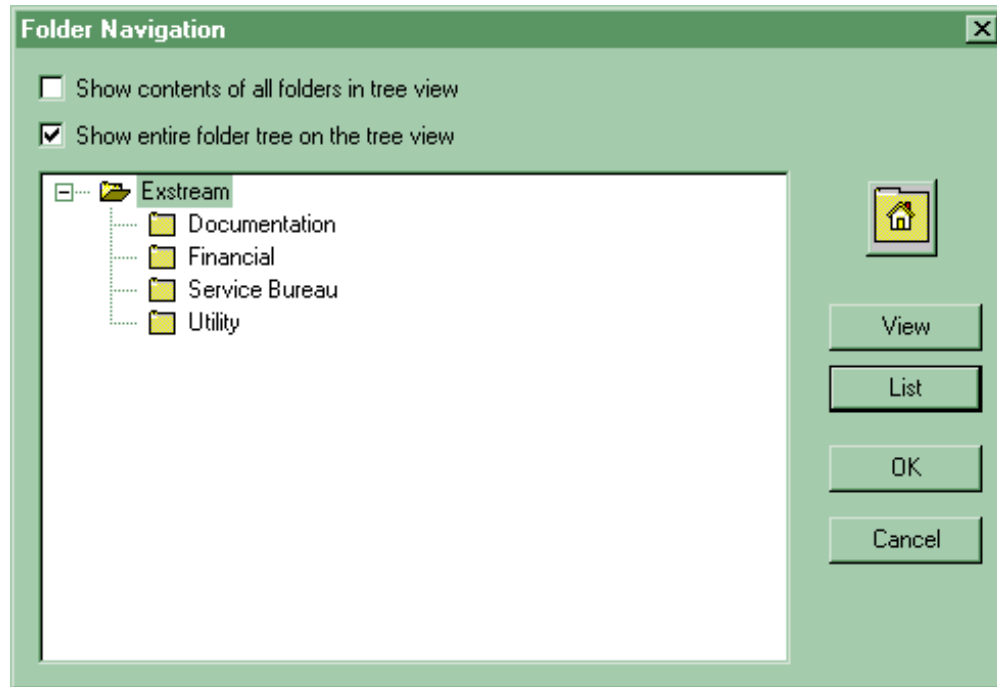
This section explains how to change your view of the *Library* by using the **Folder Navigation** dialog box.



1. Click the **Folder** button on the toolbar.
2. The **Folder Navigation** dialog box is displayed.

Using the Content Manager Interface

Folder Navigation Dialog Box



The **Home Folder** button (above the **View** button in the figure) lets you move to the starting folder for the group to which you belong. Click the **Home Folder** button to easily move back to the starting point.

Alternately, from the **View Menu**, select **Folder**. You will also get the Folder Navigation dialog box.

NOTE: If you are not in a user group or are in multiple user groups, the home folder will be the *root folder*.

3. Do one of the following:

- ◆ Select the **Show Contents of all folders in tree view** check box to show the contents of all folders grouped only by **Library** heading (for example, all applications from all folders are listed under the **Application Library** heading).
- ◆ Select the **Show entire folder tree on the tree view** check box to display all the folders in the **Library** view.
- ◆ Clear both check boxes to show only **one** folder at a time. This will also show all the subfolders that are one level below the selected folder. This is beneficial if you only work out of one folder.

4. Click **OK**.

5. The view of the **Library** is changed.

TIP: To test the **Library** view while in the **Folder Navigation** dialog box, click **View**. The contents of the **Library** will change but the changes will not take effect until you click **OK**, which will close the **Folder Navigation** dialog box. You can also display a list of objects in a folder (in the **Edit Panel**) without having to select it in the tree by selecting that folder and clicking **List** while in the **Folder Navigation** dialog box, as long as you keep the dialog box from obstructing your view of the main window.

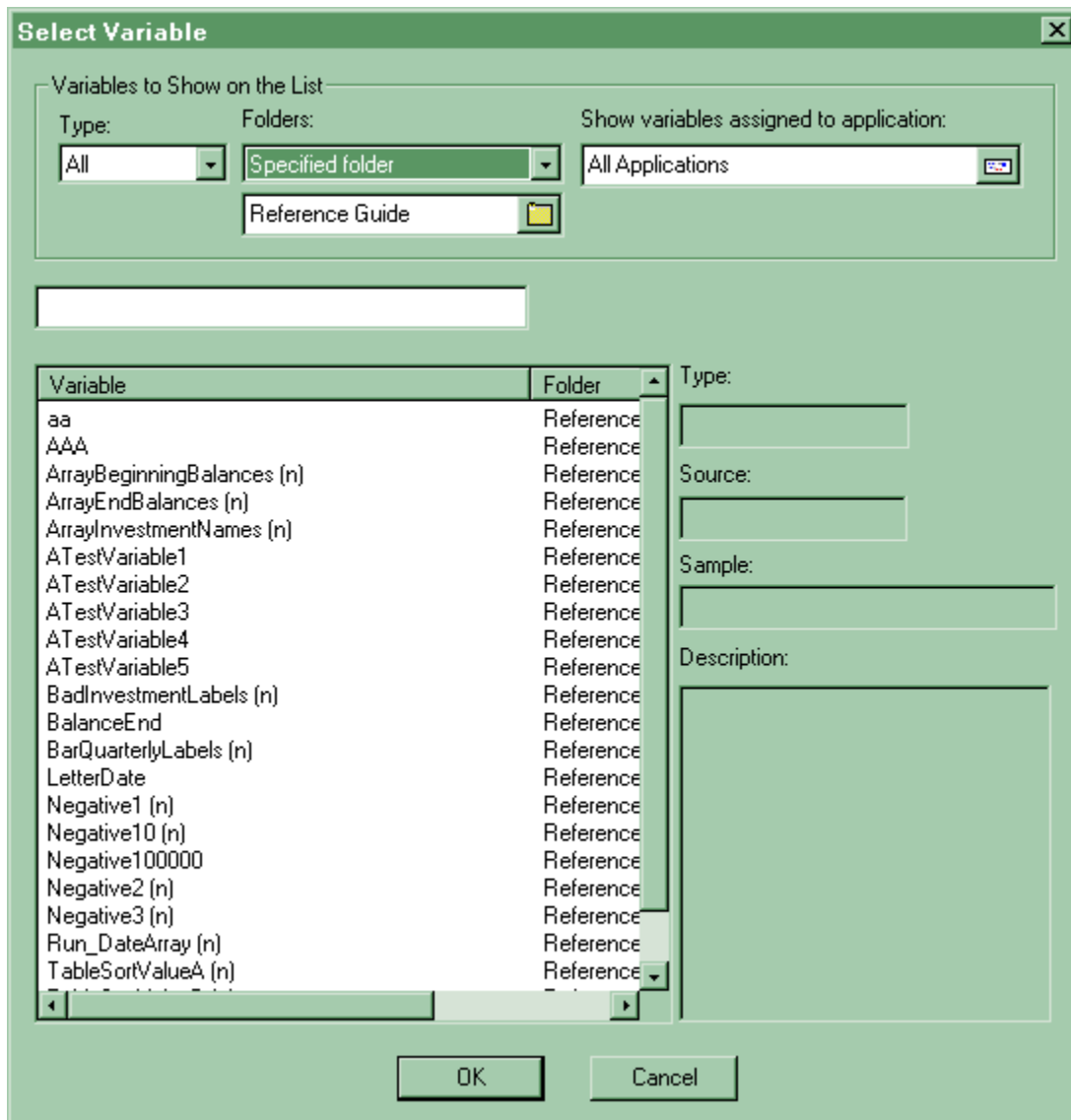
Selecting Folders while in an Object Dialog Box

When you are selecting an object in a dialog box, you can restrict the folder from which to select an object.

1. **Click** the folder list box.

See the following figure.

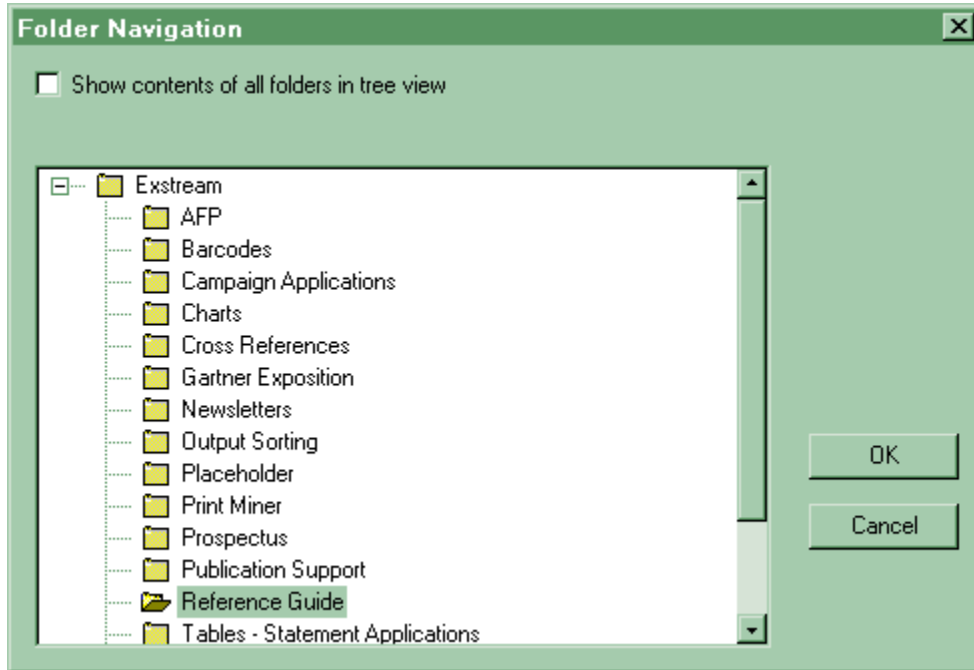
Select Variable Dialog Box



2. Then click the **Folder**  button in the list box.

Using the Content Manager Interface

Folder Navigation Dialog Box



The **Folder Navigation** dialog box appears where you can choose a folder.

1. **Choose** a folder.
2. Click **OK**.

The new list of objects will be limited to the ones in that folder.

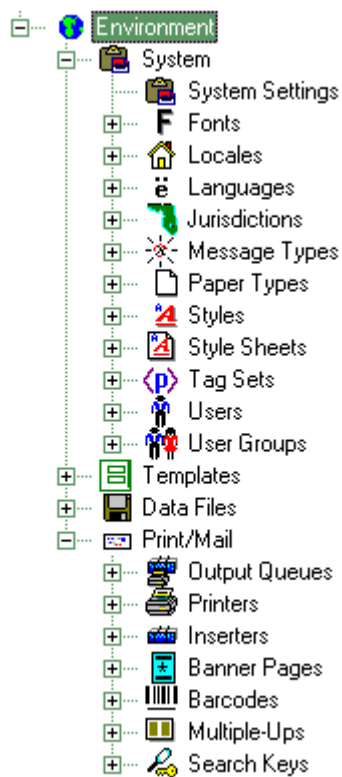
Environment Heading

In many organizations, only the *system administrator* will have access to objects under the **Environment Heading**. This is not put in place to limit your ability to work. Limited access is used to avoid problems with users changing settings that can affect other users or the final output for your finished communications.

One person should be in charge of maintaining the integrity and fidelity of font use, custom tag sets, user management, and templates, just to name a few of these global capabilities in Dialogue. In very large organizations, these tasks may be carried out by more than one person with system administrative duties.

Depending on the modules installed on your system, the following figure shows objects available under the **Environment Heading**.

Environment Heading



5.11 Searching for Objects in the Library

Searching Lists of Objects

You can use either the **Property Panel** or the **Edit Panel** to view a list of objects and their properties. You may want to do this so that you can get a quick view of all objects with a particular property, such as all messages with a particular message type, or all documents that use a certain paper type.

There are three ways to display a list. You can:

- ◆ Drag a heading from the *Library* view to either the **Property Panel** or the **Edit Panel**.
- ◆ Select a heading in the *Library* view and click the **List** button on the toolbar.
- ◆ From the View Menu, select List.
- ◆ Click the **Filtered Search** button on the toolbar to display a list of objects that meet your search criteria. More information follows later in this section.

For example, if you drag the **Pages** heading to the **Property Panel**, a list of all the pages and their properties is displayed. Notice that in the first heading, you see a description of the item.

Your list will be similar to the following figure except that your list of pages will include different pages than this one. It will scroll down to reveal all the pages on your system. Notice the many headings that give you information about the page, including the **Last Modified** date, which includes the exact time it was modified.

Pages List

Folder Learning Guide	Description	Folder	Paper	Width	Height	Duplex	Flow	Version	Status	Last Modified	Modified By	Expires
A Simple Page		Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 15 2000 17:29:03	eburnley	-
Ads and Coupons	Page with Frames	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 15 2000 17:19:24	eburnley	-
Another Page	Another Page of Ads a...	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 16 2000 09:25:40	eburnley	-
Border Page		Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 16 2000 17:03:25	eburnley	-
Border Page 2 with Fra...		Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 21 2000 16:06:26	eburnley	-
Border Page 3 with Det...		Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 20 2000 17:53:01	eburnley	-
Chart Page	To Accept Charts	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 2 2000 09:04:49	Admin	-
Extra Page for Message...	For Printing Message S...	Learning Gu...	11 x 8.5 in	11,000 in	8,500 in	Simplex	Copy	1	InProcess	March 9 2000 08:59:55	eburnley	-
Full Frames Page for Si...	Dummy page for testin...	Learning Gu...	11 x 8.5 in	11,000 in	8,500 in	Duplex	None	1	InProcess	March 9 2000 09:52:26	eburnley	-
Graphic Page for Simple...	Dummy page for testin...	Learning Gu...	11 x 8.5 in	11,000 in	8,500 in	Duplex	None	1	InProcess	March 9 2000 09:46:34	eburnley	-
One-Page Statement	Monthly Statement	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	One-Page Statem...	1	InProcess	March 23 2000 10:43:34	eburnley	-
One-Page Statement Fl...	Monthly Statement	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	Copy	1	InProcess	March 7 2000 15:58:57	eburnley	-
Page One	First page in a document	Learning Gu...	11 x 8.5 in	11,000 in	8,500 in	Simplex	None	1	InProcess	March 13 2000 13:29:46	eburnley	-
Page One for Message ...	For Printing Message S...	Learning Gu...	11 x 8.5 in	11,000 in	8,500 in	Duplex	Copy	1	InProcess	March 9 2000 10:01:29	eburnley	-
Page One for Message ...	For Printing Message S...	Learning Gu...	11 x 8.5 in	11,000 in	8,500 in	Simplex	Copy	1	InProcess	March 9 2000 08:03:50	eburnley	-
Section-Based Statement	Monthly Statement	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	One-Page Statem...	1	InProcess	March 20 2000 16:29:17	eburnley	-
Simple Page	Simple Page to Illustrat...	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 17 2000 11:38:24	eburnley	-
Statement Page 2	Second Statement Page	Learning Gu...	Blank 8.5 x 11	8,500 in	11,000 in	Simplex	None	1	InProcess	March 19 2000 18:13:18	eburnley	-

Sorting the Contents of a List

You can sort the list that is displayed in the **Property Panel** or **Edit Panel** (in ascending or descending order) by properties, such as name, description, flow, or date last modified. To sort the list in ascending or descending order by property, click on a property column heading, such as **Name**. An up arrow next to the column heading indicates an ascending sort. A down arrow next to the column heading indicates a descending sort. These arrows only remain until another column heading is selected.

Autosizing a Column

To display the entire line of text under a heading, double-click on the divider line between headings. The column will expand to show all the text.

Exiting a List

You can exit a list by either dragging another object onto the panel or by clicking the **Exit without saving** button on the toolbar.

Searching the Library

You may need to locate an item in the **Library** or narrow your view of the *Library*. Dialogue Manager lets you search the *Library* based on item properties, such as description or create date. Dialogue Manager displays the subset of the *Library* that you searched for in the **Edit Panel**.

To search the **Library**:

1. **Click** the **Library** heading of the type of objects for which you want to search. For example, if you want to search for a particular message or messages, select the **Messages** heading.
2. Click the **Filtered Search** button. Or press CTRL+L.

The **Filter Search** dialog box is displayed.

Using the Filter Search Dialog Box

Filter Search

Filter Search

Filtering: Message

Criteria

☒ Folder: [Text Box] Contains

☒ Name: [Text Box] Contains

☒ Description: [Text Box] Contains

☒ Created by: [Text Box] Contains

☒ Revised by: [Text Box] Contains

☒ Create Date: [Date Range] Date Range

☒ Edit Date: [Date Range] Date Range

☒ Expiration Date: [Date Range] Date Range

Approval Criteria

☒ Status: [Date Range] Date Range

☒ Approver: [Text Box] [Date Range]

☒ Approval Date: [Date Range] Date Range

☒ Description: [Text Box] [Date Range]

OK Cancel

1. **Select** the check box next to the property or properties by which you want to search and complete the fields.
2. Click **OK**.

The results of the search are displayed in the **Edit Panel**.

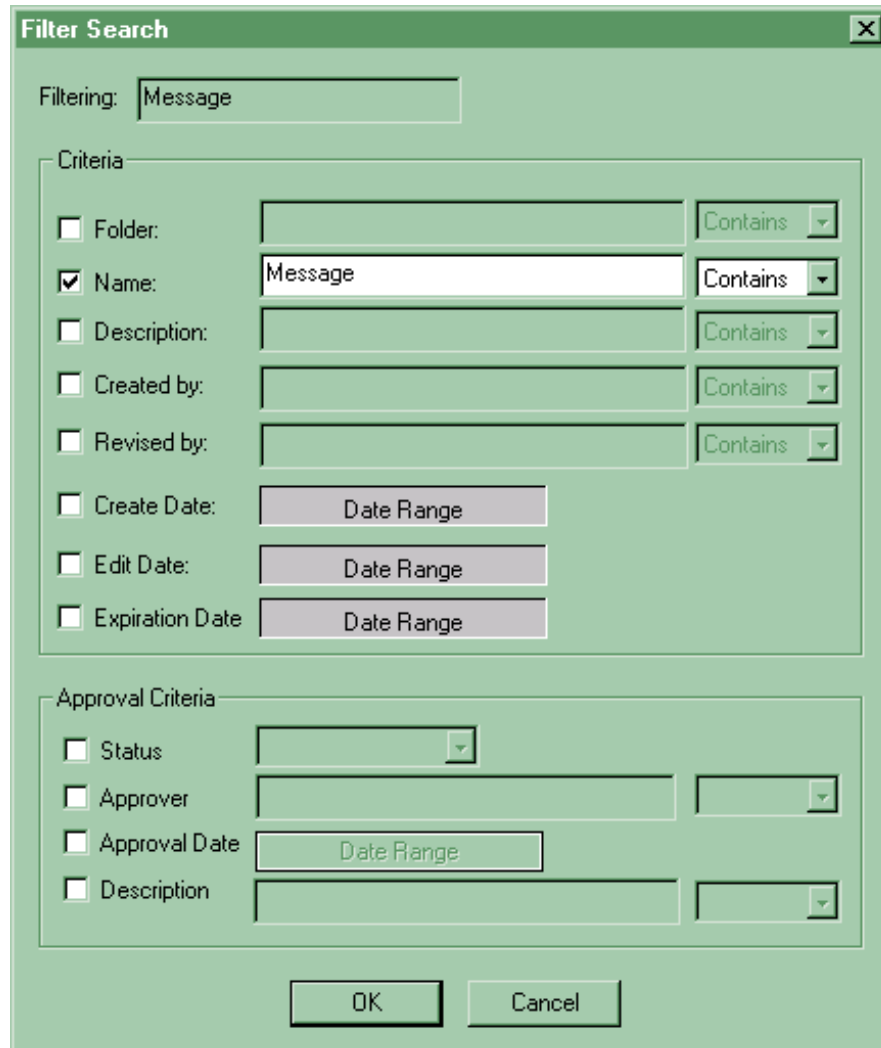
Using the Content Manager Interface

NOTE: You can also highlight a *heading* in the **Library**, such as *messages* and press CTRL+F to *filter* the heading. The results are displayed in the **Edit Panel**.

Filtered Search for a Message

If, for example, you wanted to search for a message that had the word “Message” in the name, you would fill in the options as shown.

Filtered Search Example



The screenshot shows a 'Filter Search' dialog box with a green header and a close button (X) in the top right corner. Below the header, there is a 'Filtering:' label followed by a text input field containing the word 'Message'. The main body of the dialog is divided into two sections: 'Criteria' and 'Approval Criteria'. The 'Criteria' section contains several rows, each with a checkbox, a label, an input field, and a dropdown menu. The rows are: 'Folder:' (checkbox unchecked, input empty, dropdown 'Contains'), 'Name:' (checkbox checked, input 'Message', dropdown 'Contains'), 'Description:' (checkbox unchecked, input empty, dropdown 'Contains'), 'Created by:' (checkbox unchecked, input empty, dropdown 'Contains'), 'Revised by:' (checkbox unchecked, input empty, dropdown 'Contains'), 'Create Date:' (checkbox unchecked, input 'Date Range'), 'Edit Date:' (checkbox unchecked, input 'Date Range'), and 'Expiration Date' (checkbox unchecked, input 'Date Range'). The 'Approval Criteria' section contains four rows: 'Status' (checkbox unchecked, dropdown empty), 'Approver' (checkbox unchecked, input empty, dropdown empty), 'Approval Date' (checkbox unchecked, input 'Date Range'), and 'Description' (checkbox unchecked, input empty, dropdown empty). At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

When you click **OK**, you will get results similar to those in the following figure.

Message List

Filtered List	Description	Folder	Type	Class	Template	Version
2.0 Chart Message		Learning Gu...	Generic Gra...	Graphic	Half Page 8 x 5	1
2.0 Chart Message 1		Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
2x2 Fill Message		Learning Gu...	Advertisement	Graphic	2x2 Ad	1
2x2 Fill Message 1		Learning Gu...	Advertisement	Graphic	2x2 Ad	1
Alignment Message		Learning Gu...	Generic Gra...	Graphic	Half Page 8 x 5	1
Bar Chart Message		Learning Gu...	Generic Gra...	Graphic	Half Page 8 x 5	1
Campaign Equity Message	Example	Learning Gu...	Generic Gra...	Graphic	Half Page 8 x 5	1
Chart for Publishing Message		Learning Gu...	Administrative	Graphic	Full Page Lands...	1
Chart Message	For Learning Guide	Learning Gu...	News Article	Graphic	New Template	1
Chart Message 1	Message for Chart	Learning Gu...	Generic Gra...	Graphic	Half Page 8 x 5	1
Chart Message 2	For Learning Guide	Learning Gu...	News Article	Graphic	New Template	1
Chart Message 3	For Learning Guide	Learning Gu...	News Article	Graphic	New Template	1
Chart Message 4	For Learning Guide	Learning Gu...	News Article	Graphic	New Template	1
Chart Message 5		Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
Chart Message 6	For Learning Guide	Learning Gu...	News Article	Graphic	New Template	1
Footnote 1 Text Message	In the days following th...	Learning Gu...	Generic	Text	None	1
Formatted Message Customer...		Learning Gu...	Regular Text	Graphic	Letter Heading	1
Formatted Message Headings		Learning Gu...	Generic Gra...	Graphic	Half Page 8 x 5	1
Formatted Text Message	Y2K OK! The world e...	Learning Gu...	News Article	Text	None	2
Numbered Text Message to ...	Text Messages - Flow I...	Learning Gu...	Generic	Text	None	1
Placeholder Message		Learning Gu...	News Article	Graphic	3x3 Placeholder	1
Shapes Message		Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
Star Message		Learning Gu...	Special Ann...	Graphic	4x2 Graphic	2
Table Message Example / Le...		Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
Table Message Example with		Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
Table Message Example with...	Simple working table m...	Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
Table Row Message	Testing	Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
Text Box Message		Learning Gu...	Advertisement	Graphic	1/4 page catalo...	1
Unformatted Text Message	To insert text from an e...	Learning Gu...	News Article	Text	None	1
Version 2.0 Chart Message1	For Learning Guide	Learning Gu...	News Article	Graphic	New Template	1
Version 2.0 Chart Message1 -...	For Learning Guide	Learning Gu...	News Article	Graphic	New Template	1

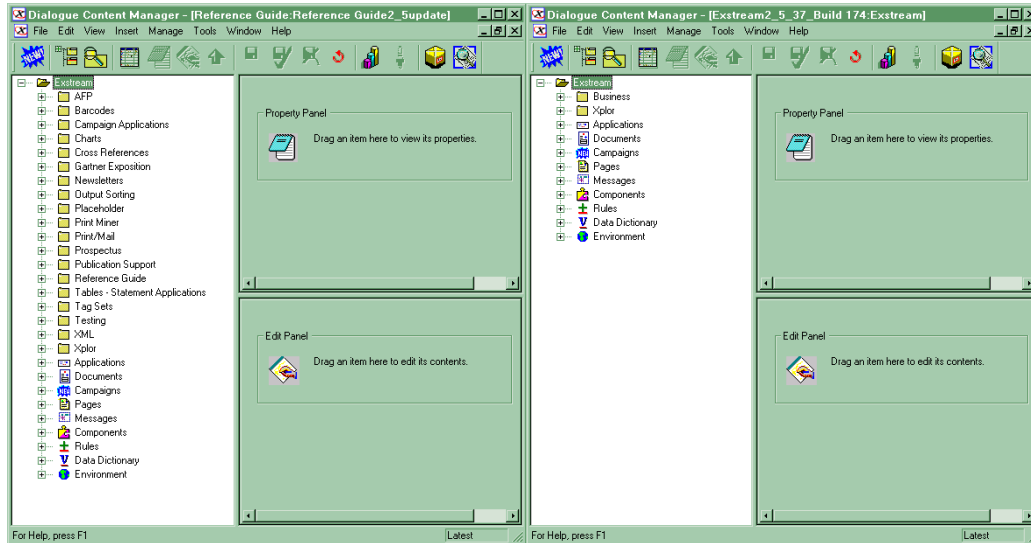
The list is created with any messages that have the word “Message” in their name. As you can see, you can access a multitude of attributes in the list when it appears in the **Property Panel** or **Edit Panel**, as in the figure.

Using the Content Manager Interface

Running Two Instances of Dialogue Content Manager

It is possible to run two instances of Dialogue Content Manager side-by-side on your desktop so that you can see and compare objects in the **Library** between different design **databases**.

Two Instances



IMPORTANT NOTE: If you do this, pay careful attention to which database you are adding objects. Do not overwrite objects with the same name that you need to keep.

5.12 Shortcut Keys

Shortcut keys are available in Dialogue to speed your work with objects.

Complete List of Shortcuts in Dialogue Content Manager

SHORTCUT	LOCATION WHEN AVAILABLE	ACTION
CTRL + D	List View Edit Panel Data Map Library	Delete
CTRL + E	List View Edit Panel Library	Edit
CTRL + F	Library	Find Text
CTRL + H	Data Map	View Hex Characters
CTRL + L	Library	Filter Tree
CTRL + N	List View Library	Insert
CTRL + P	List View Edit Panel Data Map Property Panel Library	Properties
CTRL + R	List View Library	Rename
CTRL + S	Edit Panel Data Map Property Panel	Save
CTRL + T	List View Edit Panel Property Panel Library	Test
CTRL + T	Data Map	Add Spot
ALT + C	Data Map	Change Spot
ALT + H	Library	History
ALT + J	Library	Jurisdiction
ALT + S	Data Map	Spot
ALT + S	Code Panel	Insert Condition
ALT + F	Code Panel	Insert Function
ALT + V	Code Panel	Insert Variable
SHIFT + DELETE	List View Edit Panel Data Map Library	Cut
F1	Anywhere	Help – automatically brings up the Reference Guide to Content Manager
SHIFT + F1	Anywhere this feature is active	Context Help

Using the Content Manager Interface

<i>SHORTCUT</i>	<i>LOCATION WHEN AVAILABLE</i>	<i>ACTION</i>
F3	Data Map	Find Again
SHIFT + INSERT	List View Edit Panel Data Map Library	Paste
PAGE DOWN	Data Map	Next Page
CTRL + PAGE DOWN	Data Map	Next Customer
ALT + PAGE DOWN	Data Map	Next Section
PAGE UP	Data Map	Next Page
CTRL + PAGE UP	Data Map	Next Customer
ALT + PAGE UP	Data Map	Next Section

Chapter 6: Working with Objects

6.1 Working in the Library

Referenced Objects

What Are Referenced Objects?

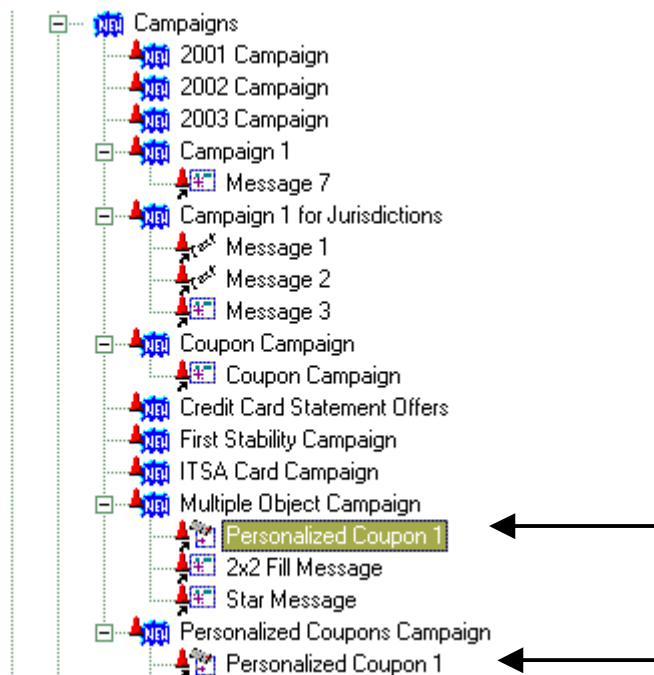
Referenced objects are pointers to **Library** objects. For example, a message can be included in several campaigns. Only one message must be created. Copies of it can go in any number of campaigns, pages, and documents.

What are Reference Lists?

Reference lists are copies of the original object that are inserted under an object of a higher order. For example, there is a reference list of messages under a particular document.

1. The actual message is contained in the **Messages** heading, a pool of messages that can be placed in campaigns and documents or even directly on pages. The message listed in each campaign is a reference to the message.
2. Notice in the figure that follows this discussion, that some messages under the **Messages** heading are referenced in more than one **Campaign**.
3. For instance, the *Personalized Coupon 1* is used more than one time.

Campaigns Using the Same Messages





All **referenced objects** have a small arrow at the lower left corner of the icon, like a Windows shortcut. This shows you that this is a copy of the object and not the original.

When you delete a message from a campaign, you are only deleting the reference to the message, not the message itself. If you want to delete the message itself, select the message under the **Messages** heading and delete it. References let you reuse messages and other objects in different instances.

IMPORTANT NOTE: The list of objects in an application, document, or a campaign is a *reference list*. The order in which objects are listed in a reference list indicates the order in which the objects will be processed.

For example, the order in which you list the campaigns in an application sets the priority of the campaigns. The first campaign listed should be more important than the second campaign listed, and so on.

NOTE: The objects pictured in the previous figure will not exist on your system. Throughout this Guide, you will have to create the objects if you are starting with a clean database. A practice database should be used so that you do not interfere with your organization's data until you are comfortable using Dialogue.

Library Components

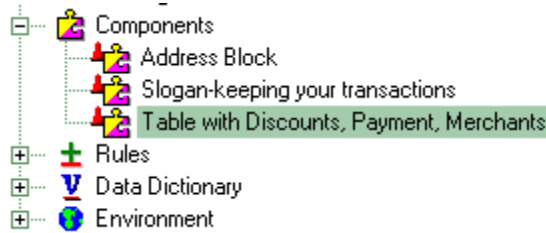
Components of objects can be saved in the Library. These are called **Library Components**. You can locate the components under their own heading, which looks like a puzzle piece. This heading will appear under each folder where a component is saved. You can save complex tables, text boxes, charts (if you use the charts module), shapes, and images.

You save the component in Designer by right-clicking and selecting **Add to Library**. You are then prompted for a folder, name, and description. The component appears in the list in the Content Manager Library.

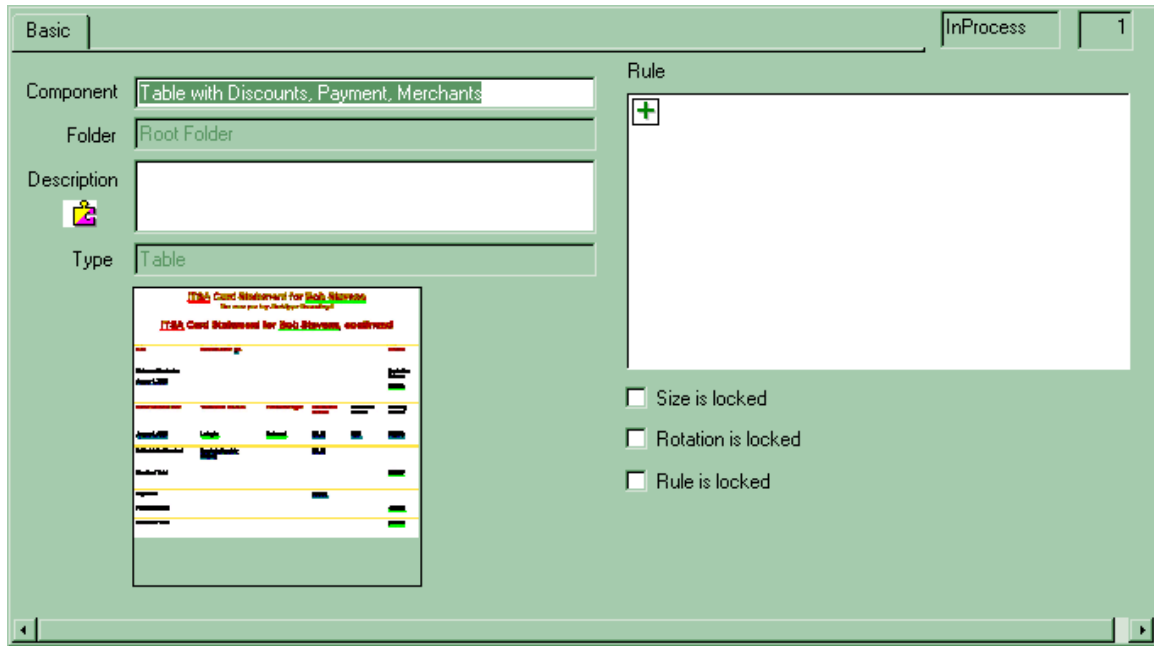
- ◆ Regular components are supported and are referred to as **unnamed components**.
- ◆ Once created, Library Components can be **renamed**, **cloned**, **moved**, and **deleted** from the Library.
- ◆ Library Components can be **locked** against resizing, rotation (including flipping), and rule override. The contents of a Library Component cannot be changed until the **Unlock** option is chosen from the shortcut menu. You must have **Edit Creative** access to the folder of the Library Component to do this. The user saves changes they have made by selecting **Save to Library**. They can also use the **Relock** option to restore the Library Component to a locked state.
- ◆ When a Library Component is resized or rotated, or its rule has changed, the **Save to Library** selection is added to the shortcut menu. Any changes will be saved when this option is chosen.
- ◆ A local unnamed copy can be made of a library component by selecting **Make Unnamed Copy** from the shortcut menu.
- ◆ **Grouped Components** are not supported as Library Components.
- ◆ **Frames** are not currently supported as Library Components.
- ◆ **Barcodes** already exist in the Library, therefore there is no need to support them as Library Components.
- ◆ **Versions** can be managed for Library Components.

Working with Objects

Components in Library



Component in Property Panel



In Designer, a Library Component is placed in a message, page, or template by choosing **Drawing Object, Library Component** from the **Insert Menu**. You can also accomplish this by pressing the Library Component icon (puzzle piece) in the drawing objects toolbar and choosing the desired component from the resulting dialog.

Library Rules

Rules can be saved in the Library. You can locate the rules under their own heading, which looks like a plus and minus sign. You save the rule when you create, and it appears in the list in the Content Manager Library. See the section on [Rules on Objects](#) in this book, especially the topic [Library Rules](#).

Rules in Library



Refreshing the Library

Whenever you have made changes to a list, you may not see the change in the list immediately. You can refresh the list to see the result of your changes. Simply collapse the list by clicking (or double-clicking) on the **minus sign (-)** and then expand it by clicking (or double-clicking) on the **plus sign (+)**. Your list will be refreshed.

TIP: You can also refresh the active panel in Dialogue Manager by pressing F5 on the keyboard.

Renaming Objects in the Library

Renaming objects in the *Library* is easy. It does not matter if you rename a *reference* or the actual object under the Dialogue Manager heading. Dialogue Manager automatically renames all references to the object as well as the actual object.

To rename an object:

1. Click once on the object you want to rename.
The object is selected.
2. Click on the object again. (Be careful not to click too fast, because this would be a double-click.) A box is displayed around the object and you can edit the name.
3. Press **Enter** (or click anywhere off the object) to save the name change.

The object and all of its references are renamed throughout Dialogue.

Alternately,

1. Select the object by highlighting it.
2. In the **Menu Bar**, select **Edit**.
3. Select **Rename**.
4. A box is displayed around the object and you can edit the name.
5. Press **Enter** or click anywhere off the object.

The object and all of its references are renamed throughout Dialogue.

NOTE: You can also rename an object in the **Property Panel** by clicking on the name and typing a new name.

Dragging and Dropping Objects

You can use the **drag and drop** technique to perform many functions with the folders, headings, and objects in the **Library**. Drag and drop means to depress and hold the left mouse button on an item and to continue holding down the mouse button while you drag the object to a new location. When you release the mouse button, the object is dropped in the new location. In some cases, the object is actually moved to the new location, in other cases, the object becomes a reference to the original. You will see the icon for moving an item appear as you move objects. The icon looks like the Exstream x in a circle with an up and down arrow.

When you select an item to move, the pointer changes to the icon for that object or **Library** heading, such as a page. If an item cannot be dropped in a location, the pointer changes to the **Not Available** icon, to show that the chosen action is not available.

Working with Objects

Not Available



You can use the **drag and drop** technique to:

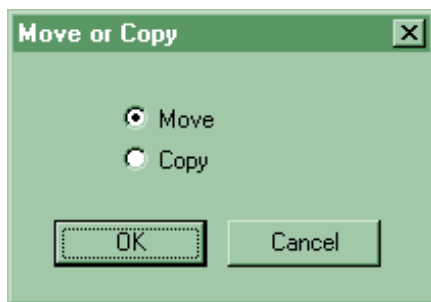
- ◆ Move, add to, or delete the contents of a reference list (the contents of a campaign, for example).
- ◆ Delete an object.
- ◆ Open an object in the **Property Panel** or **Edit Panel**.

Move and Add Objects

To *move or add* to the contents of a *reference* list using **drag and drop**:

1. Open the heading you want to edit by clicking the plus sign next to it in the **Library**.
2. Drag the object you want to move to the new location.
3. You can drag an object into the list from anywhere else in the list to add a new *reference*.
4. You can also drag objects to different locations when they are displayed in the **Property Panel** or **Edit Panel** as a list.
5. If you drag a message from one campaign to another, a dialog box will ask you to select **Move** or **Copy**.
6. Select the option button you want and click **OK**.

Move or Copy

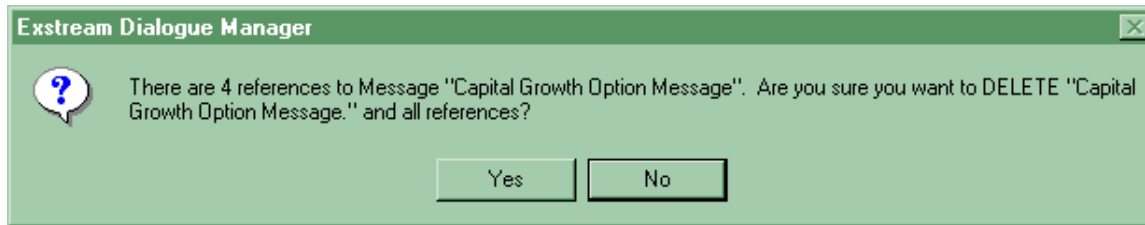


Deleting an Object

To *delete* an object using **drag and drop**:

1. Drag the object you want to delete onto the scroll bars on the **Library**. To do this you must be in a view of the **Library** where the scroll bars are visible. You can also drag the object to an empty area below the **Library** list.
2. The cursor will change to a trashcan icon.
3. When you release the mouse button, a message similar to the one below is displayed indicating the number of references there are to the item and asking if you want to delete the item.
4. This message is only shown if you are deleting the original object, not a reference to it.

Deletion Verification Message Box



5. Click **OK**.
6. The item is deleted.

IMPORTANT NOTE: When you drag a **reference** onto the **Status Bar** to delete it, this does not delete the object itself, but only the reference to it. To delete an actual object, delete it from under its own heading. For example to delete a message, delete it under the message heading.

7. You can also delete an object in the **Library** or a list by using the DELETE key on the keyboard. In the case of lists, if you select multiple objects, you will be prompted as each object deletes.

Opening an Object

To *open* an object in the **Property Panel** or **Edit Panel** using **drag and drop**:

1. Locate the object whose properties or contents you want to edit and drag the object to the **Property Panel** or the **Edit Panel** depending on the view and function you want to perform.
2. The object is displayed in the respective panel.
3. If you drop an object that contains graphics on the **Edit Panel**, Designer is launched.
4. If you drop a *heading* in the **Property Panel** or **Edit Panel**, only a *list* of those items under the heading is shown.
5. Some objects, such as **variables** and some of those under the **Environment** heading, cannot be opened in the **Edit Panel** or cannot be viewed as a list.

TIP: You can also drag objects from the list views back to the **Library** view. You may want to do this when you want to drag a message into a campaign but cannot see everything at one time. For example, you may want to do this when the **Messages** list is too long for you to view in one window.

Dragging from Lists

To *do drag* from a more advantageous view:

1. Drag the **Messages** heading to the **Edit Panel** to create a list of messages.
2. Scroll the **Library** to display the campaign to which you want to add a message.
3. Drag the message from the list displayed in the **Edit Panel** onto the campaign.

Multiple Item Drag and Drop

You can select multiple items in a list in the **Property Panel** or the **Library**. You do this by dragging your pointer across the items you want to select.

- ◆ You can hold down the SHIFT key and click two items in the list, and all the items in between will be selected.
- ◆ You can hold down the CTRL key and click successive items in the list, and all the items will remain selected until you click away from them without holding the CTRL key.
- ◆ You can select all the items in a list by right-clicking and choosing **Select All** from the *shortcut menu*.

When multiple items are selected in the **Property Panel**, they can be dragged to an area in the **Library**. For example, you can select variables in the list and drag them to move them into a new folder in the **Library**.

You can also drag messages from the **Property Panel** into a document or campaign in the **Library**.

You can drag objects from the **Library** to the **Property Panel** in the **Contents** area of the object.

TIP: Be sure the target object to which you are dragging selected objects is visible in the **Property Panel**. However, if you are dragging to the **Library**, it will scroll as you drag.

6.2 Load and Unload

The **Load** feature allows you to transfer objects between databases. The **Unload** feature **does not delete** objects from the original database; it merely transfers a copy to an external file. You can then load objects from the file into a different database. The load/unload file will have an .xob extension.

Database and XOB File Version

The **Load** feature formerly required that the load database version and the unload database versions be equal. In version 3.0.004 and later, the load database version can be the same or older than the unload database version.

XOB files created with version 3.0.004 of Dialogue or later will be backwards compatible to XOB files created with Dialogue 3.0.004 or later. XOB files are not forward compatible.

XOB files report the version of Dialogue that was used to create them. XOB files cannot be appended unless the Dialogue version used to create the original XOB is the same as the current Dialogue version.

Unload

1. **Select** the item in the Library that you want to **Unload**.
2. Go to the **File Menu**, and **choose** the **Unload an Item** option. (You can also right-click and choose **Unload an Item** from the shortcut menu.)
3. The **Unload File Contents** dialog box appears.

Unload Database Contents to a File Dialog Box

Unload Database Contents to a File Dialog Box

Unload Database Contents To A File

Load File: C:\Program Files\Exstream\4.xob

☒ Append to Unload File
☐ Approved Only

Publish Date: May 10 2002 15 27

Database: Reference Guide 3_0

DB Version: 3.00.001

App. Version: 3.00.004

Creator: eburnley

Created: 05/10/2002 13:16

Last Updated: 05/10/2002 13:16

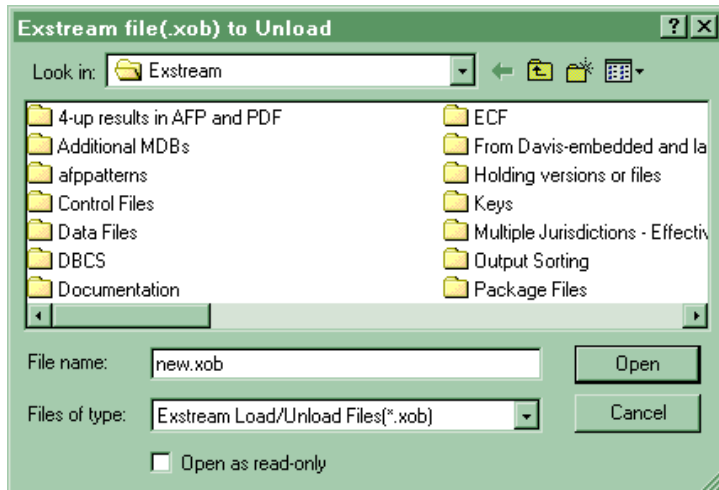
Add to Unload File

Exit

In the **Unload Database Contents** dialog box, you will see the last **Load File** that was used. This will be a file with an .xob extension. You can add to the contents of an **existing** XOB file if you are unloading from the same database and you were the creator of the original XOB file, or have **Super User** access.

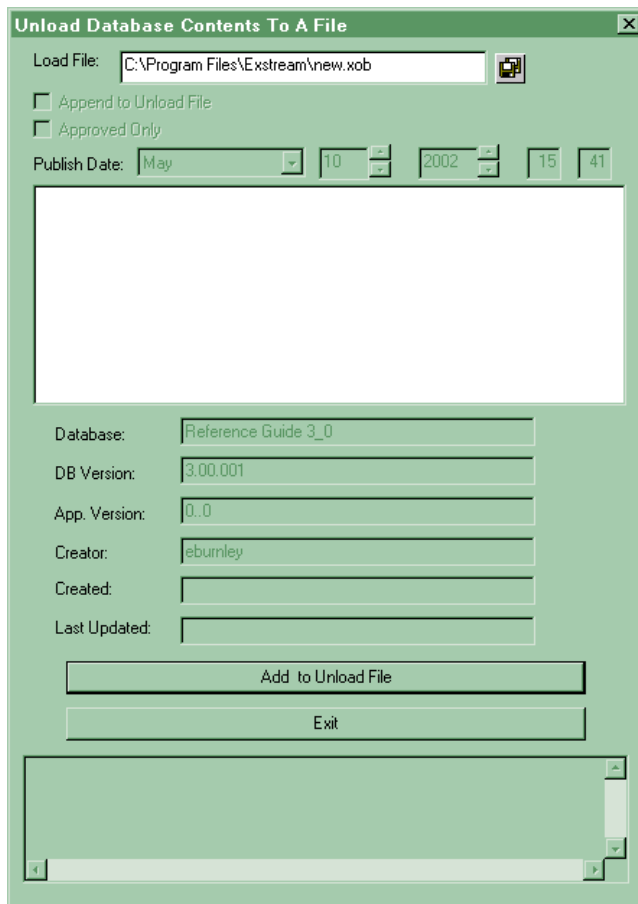
1. To select a different .xob file, click the **Browse** button.
2. **Select** the directory and file to which you want to unload the currently selected item(s).
3. To create a new .xob file, **select** a directory and type a new name.

Browse Window



4. Click **Open** to open the existing file or create a new file with the name you just typed. You are returned to the **Unload Database Contents to a File** dialog box.

Unload Database Contents to a File Dialog Box



The file in the figure is a new file, so the **Append to Unload File** check box is not available.

Working with Objects

1. Choose the **Append to Unload File** check box.
 - ♦ The default is to append data to an existing file, if you want to eliminate the items in the currently selected file, clear the **Append to Unload File** check box.

Once you have loaded any item or empty **Heading** into the file, the **Approved Only** check box becomes available.

2. To unload only approved items before a certain date, select the **Approved Only** check box. The current date and time will appear next to **Publish Date**.
3. Select the appropriate date from the **Publish Date** combo boxes.

Items **previously** unloaded into the file will appear in the large white text box. The **Database** (ODBC DSN name or Access file name), database **Version**, **Creator**, date **Created**, and **Last Updated** date will also appear in corresponding text boxes.

4. When you are ready to add the selected item(s) to the XOB file, click the **Add to Unload File** button.
5. The objects will be unloaded, along with all of the objects' dependencies (nested items and objects used as references in the higher object, fonts variables, rules, etc.), unless you checked **Approved Only**.
6. If you checked **Approved Only**, only those items, including dependencies, which meet the approval date will be unloaded.

The objects will display in the lower text box as they unload.

7. Click **Exit** to close the dialog box.

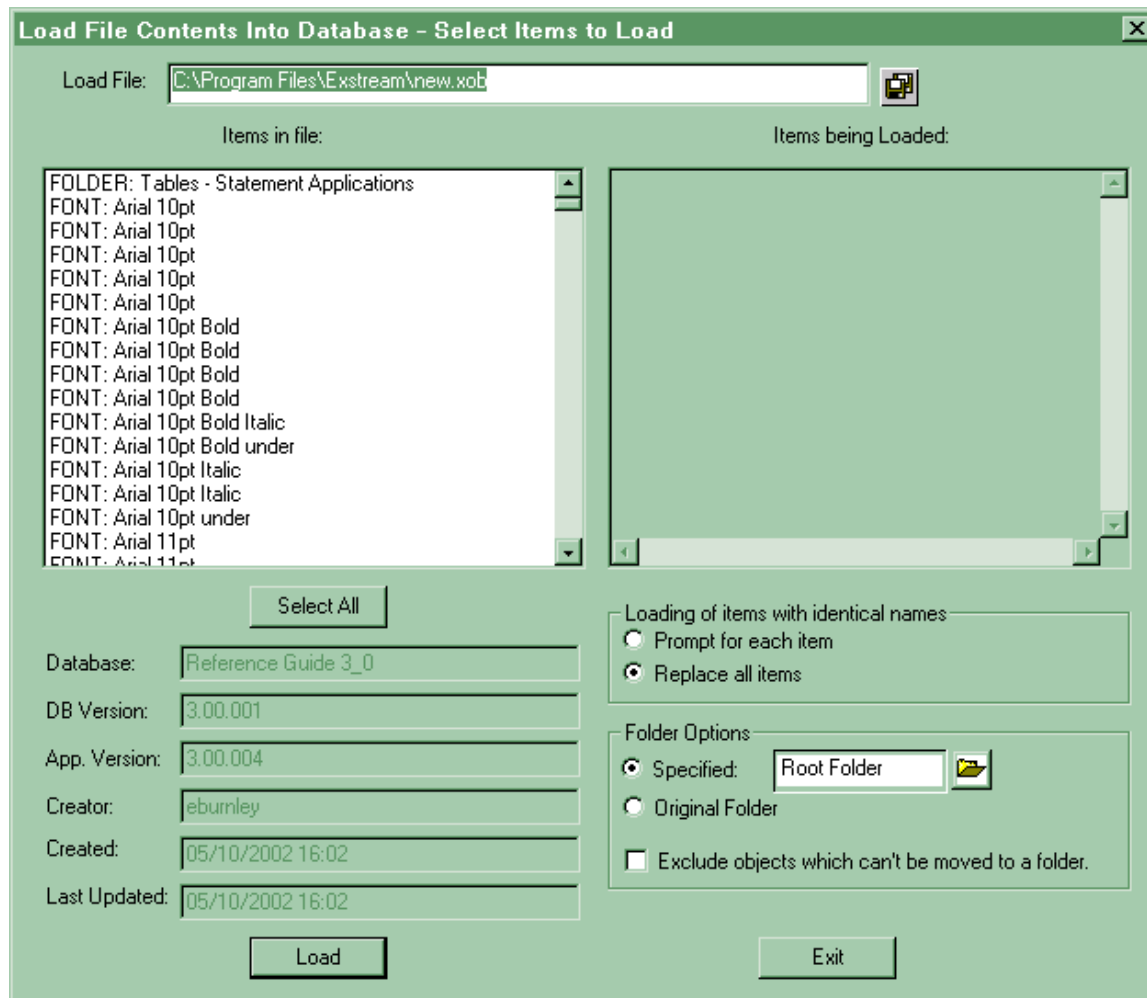
Unload Database Contents to a File Dialog Box, showing that Unload is Complete

Load


1. Go to the **File Menu**, and **choose** the **Load an Item** option. (You can also right-click and choose **Unload an Item** from the shortcut menu.)
2. The **Load File Contents – Select Item to Load** dialog box appears.

Load File Contents – Select Items to Load Dialog Box

Load File Contents – Select Items to Load Dialog Box



You will see the last **Load File** that was used. This will be a file with an .xob extension. The items currently in the file are displayed in the **Items in File** text box.

3. To choose another XOB file to load, **click** the **Browse**  button and select another XOB file.
4. To load an individual item, **click** the individual item in the list on the left.
5. To load more than one item, click the items successively.
6. Click **Select All** to load all of the items to the **Items being Loaded** list on the right.

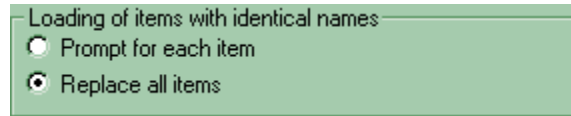
Working with Objects

Dimmed Information

The **Database** name, database **DB Version**, **Application Version**, **Creator** who created the file, date **Created**, and **Last Updated** date of the XOB file will be displayed.

Loading of items with identical names Area

Loading of items with identical names

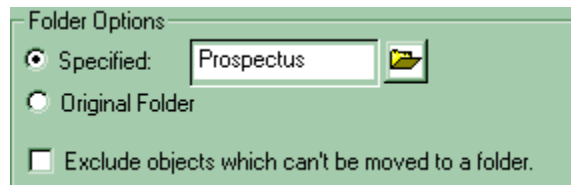


1. To be prompted to replace each item, choose **Prompt for each item**.
 - ◆ You will be prompted whenever an identical name exists in both the XOB file and the currently selected database.
2. To replace all items, choose **Replace all items**.
 - ◆ Items with identical names will automatically be replaced with items from the XOB file, *unless* the item being loaded has a date before the item being replaced.


Folder Options Area

NOTE: The **Load** option defaults to the **Specified** folder option, with the original folder named. You can accept this specification, type or browse for a new folder name, or, if you change your mind, you can click the **Original** option button to return to the original folder as the target.

Folder Options Area



NOTE: Subfolders will not be **created** when the XOB file is loaded. However, the objects in the subfolders will be loaded into the folder you specify. Create any necessary folders in the receiving database before you begin the process.

1. To place the items being loaded into a specific folder, choose **Specified**.
 - ◆ Then click the folder  icon to select a folder.
2. To place the items being loaded into the original folder name, select **Original Folder**.
 - ◆ Items being loaded that were contained in a folder in the unload database will be loaded into a corresponding folder. If the folder does not exist on the current database, the folder will be **not** be created automatically.

By default, objects that are not folder-specific, root folder objects, will load to the root.

3. If you do not want to replace objects in the root folder, select the **Exclude objects that cannot be moved to a folder** check box. Then they will not be loaded

Loading the Objects

1. Select the items to be loaded from the **Items in File** text box

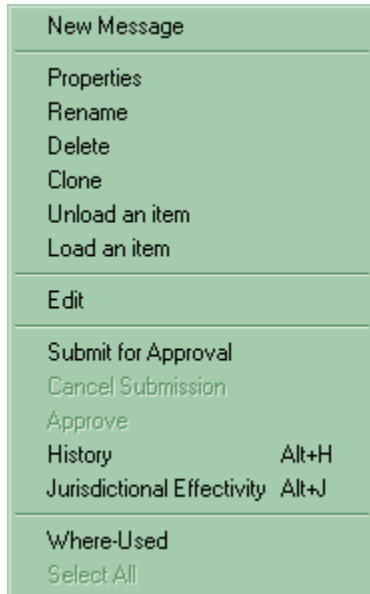
Not only will a selected item be loaded, but all the dependencies in the XOB file will also be loaded. You do not have to choose all items in the **Items in File** text box. For example to load an application, just select the application. All of the dependencies of the application will automatically be loaded.

2. Click the **Load** button when you have selected the load options and the items to be loaded. Items being loaded will display in the **Items being Loaded** text box. All buttons will be dimmed until the load process is finished.
3. Press **Exit** to close the dialog box.

6.3 Working with Shortcut Menus

You can access *shortcut menus* from many different places in Dialogue Content Manager by right-clicking. *Shortcut menus* provide quick access to many functions. For example, if you select a **message** under the **Messages Heading** and right-click, the following *shortcut menu* is displayed.

Shortcut Menu



Select the option from the available items that you want to use. If an item is dimmed, then it is unavailable for the object selected.

NOTE: *Shortcut menus* are context-sensitive and display different options according to what kind of *object* is active and the location of the pointer on the screen.

6.4 Creating a New Object

The process for creating objects is similar whether you are creating a new message, campaign or page. When you create some objects, Dialogue wizards are displayed to help you complete all the necessary steps.

Lesson One: Create a Message

LESSON NOTE: Lessons are included in this Guide to help you understand basic procedures. Lesson Notes will guide you in your choices to make the example as easy as possible. They will also give you additional information. Later, if you need to know how to perform a general procedure, just follow the numbered steps and make your own choices.

LESSON NOTE: Before you begin these lessons, create your own **LESSON FOLDER** in the **Library** in **Content Manager** and keep all your own created objects in that folder. Make it your **working folder** so that you can keep your objects together. That way, if objects by the same name exist in other folders, you will not be confused.

Follow the numbered steps to use this as a lesson. Make the choices as suggested in the **Lesson Notes**.

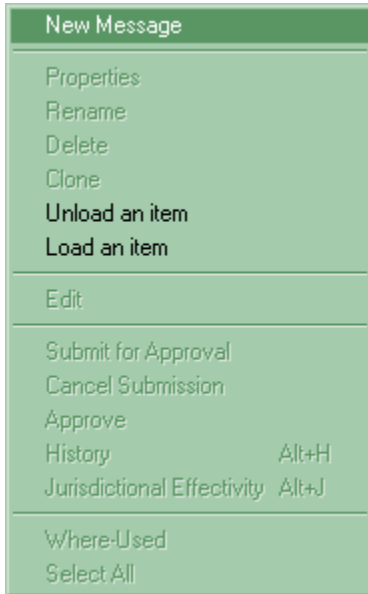
LESSON NOTE: The following information is formatted as a lesson on creating a new message. The process for creating other objects is similar.

To create a new object:

1. In the **Library** in **Content Manager**, select the heading of the new object you want to create, such as **Messages**, or select a reference to the type of object you want to create, such as a *message* listed under another object to create a new message.
2. **Right-click** to display the shortcut menu and choose **New Message**.

Working with Objects

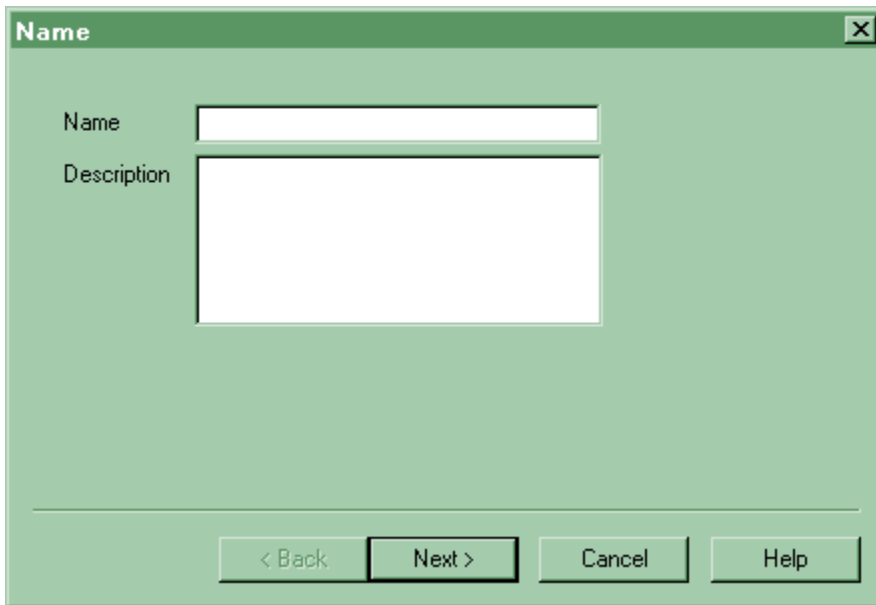
Shortcut Menu



3. This action starts a wizard to complete the process.

The Name Dialog Box

Name Dialog Box

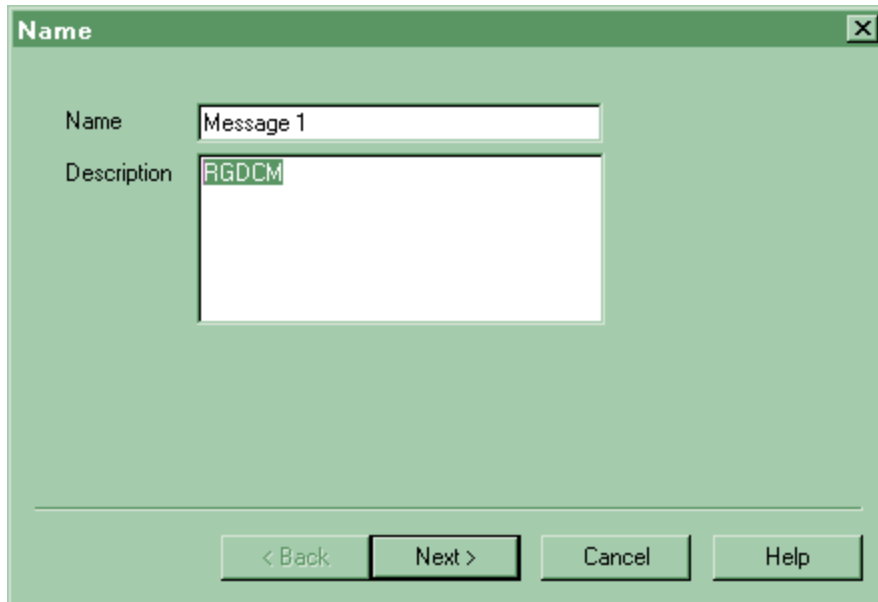


1. Type a name for your new message in the **Name** text box.

LESSON NOTE: Type: Message 1

2. Press the TAB key and type a description in the **Description** text box.

Message Name and Description

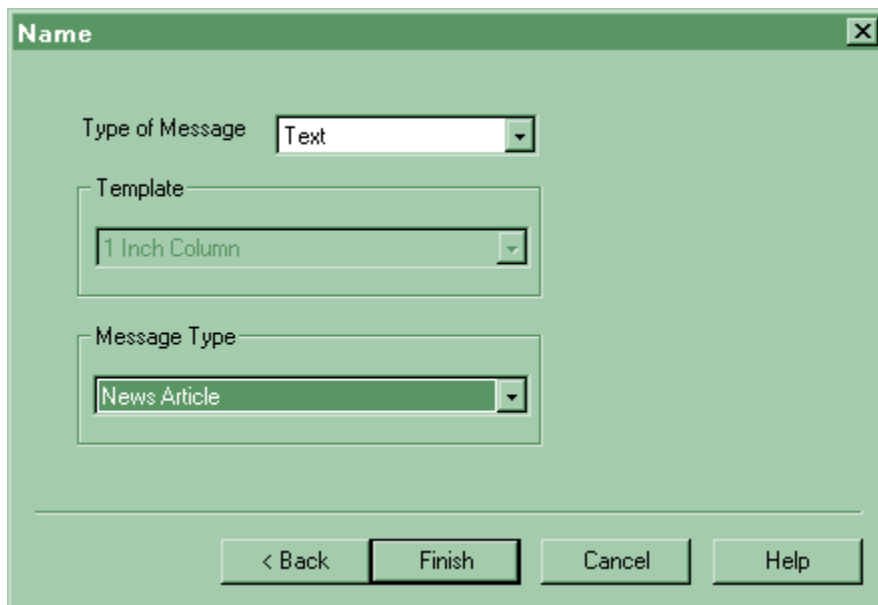


The screenshot shows a dialog box titled "Name" with a close button (X) in the top right corner. It contains two input fields: "Name" with the text "Message 1" and "Description" with the text "RGDCM". At the bottom, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

3. Click **Next**.
4. The next screen appears.

Second Screen

Second Screen of Name Dialog Box



The screenshot shows the second screen of the "Name" dialog box. It features three drop-down menus: "Type of Message" set to "Text", "Template" set to "1 Inch Column", and "Message Type" set to "News Article". At the bottom, there are four buttons: "< Back", "Finish", "Cancel", and "Help".

1. Select the **Type of Message** from the drop-down list.

LESSON NOTE: For this exercise, select **Text**. Text messages do not use **Templates**, so the option is not available.

Working with Objects

2. Select the **Message Type (Layout)** from the drop-down list.

LESSON NOTE: For this first example, choose **News Article**.

3. Click **Finish**.
4. The message is displayed in the **Property Panel** so that you can view and define its properties. It now also appears in the **Library**.
5. If the **Save and Exit** icon is dimmed, click the **Property Panel** to make the message active.
6. Click the **Save and Exit** button on the toolbar to save and exit the new message you have created.

LESSON NOTE: You can also create a new folder, application, document, campaign, page, or message within a specific folder. Select the folder in which you want to create the item, and right-click to display the *shortcut menu*. Select the new item you want to create and complete the **Name** dialog box as you did in this exercise.

LESSON NOTE: This is the end of Lesson One.

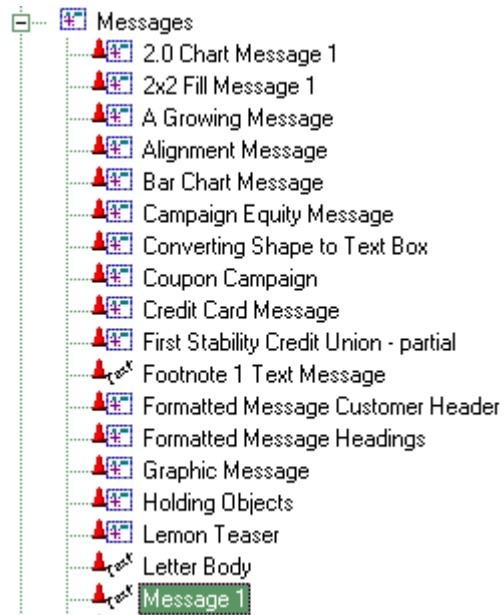
6.5 Cloning an Object

You can duplicate an existing object in the **Library** by *cloning* it.

Lesson Two: Clone a Message

LESSON NOTE: Follow this brief exercise as a lesson in cloning.

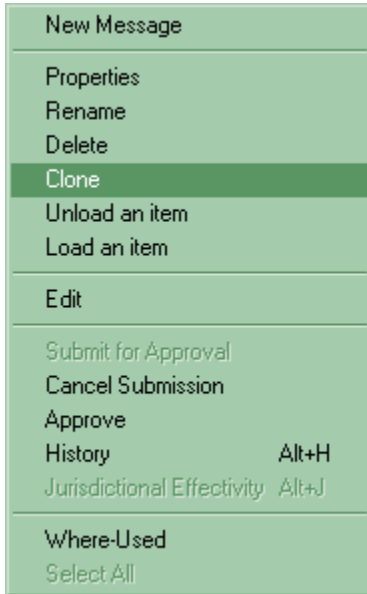
Message 1 in Library



1. **Right-click** on the object in the **Library** to display the *shortcut menu*.
2. Select **Clone**.

Working with Objects

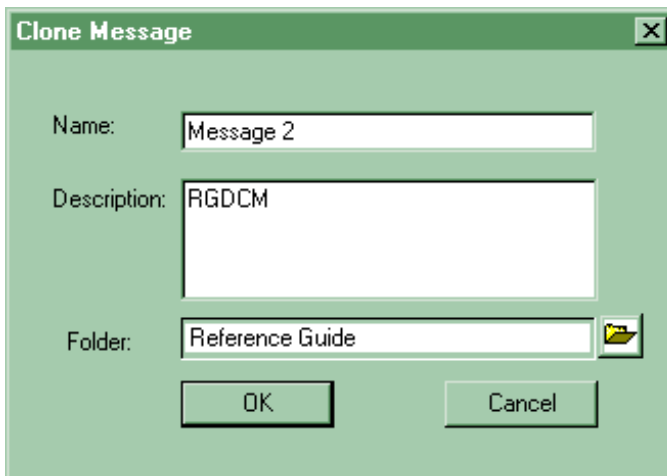
Shortcut Menu



3. Type a new name in the **Clone Message** dialog box.

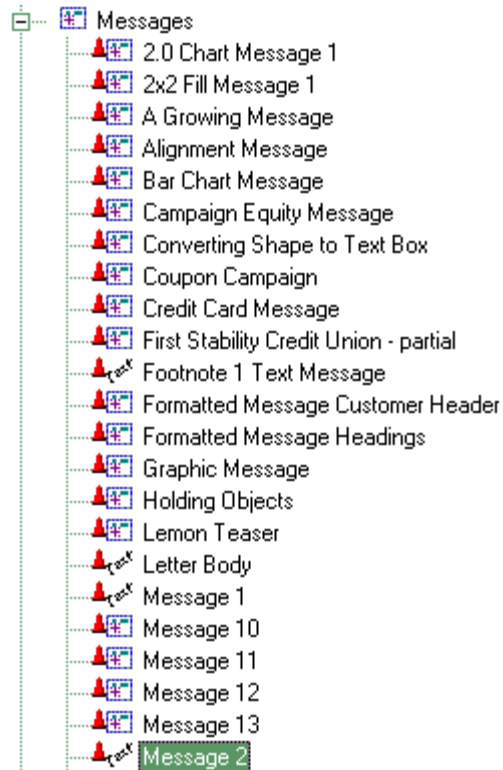
LESSON NOTE: Type **Message 2** for this exercise.

Clone Message Dialog Box



IMPORTANT NOTE: You should realize that when you clone a **high-order object** that contains other objects, like an application, that the objects under it have not changed. Therefore, all the messages included in the first application are referenced in the second application. If you change a message in the second application, it will change objects with the same name in all applications that include a reference copy, and it will change the name of the original object.

Cloned Messages in Library



LESSON NOTE: As you work through the exercises, follow each exercise for specific instructions. You are creating a new object for each lesson so that you will have an example at every stage if you have trouble at any point doing the exercises, or if you want to start from a specific point and work on these exercises again.

LESSON NOTE: This is the end of Lesson Two.

Chapter 7: Object Properties

7.1 The Property Panel

As explained earlier, the **Property Panel** is the top-right panel of the interface. You can use the **Property Panel** to display and edit the properties of any object. When you start Manager, the object that was in the **Property Panel** when you closed it will reopen. The **Property Panel** remembers the last tab you have opened on each object and will reopen it on that tab until you close Manager. However, when you restart Manager, the object will open on the first tab.

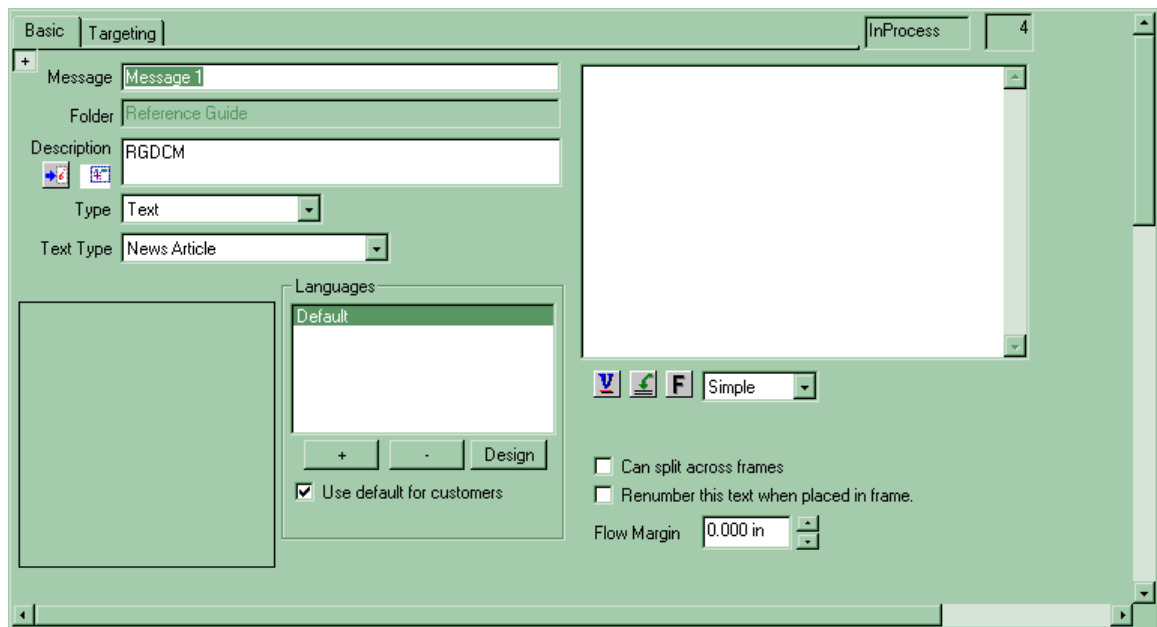
Displaying an Item in the Property Panel

There are **three** ways to display an item in the **Property Panel**. You can:

- ◆ Drag the object to the **Property Panel**.
- ◆ Select the object and click the **Properties** button on the toolbar.
- ◆ Double-click the object – if you have enabled the option in **Tools, Options**.

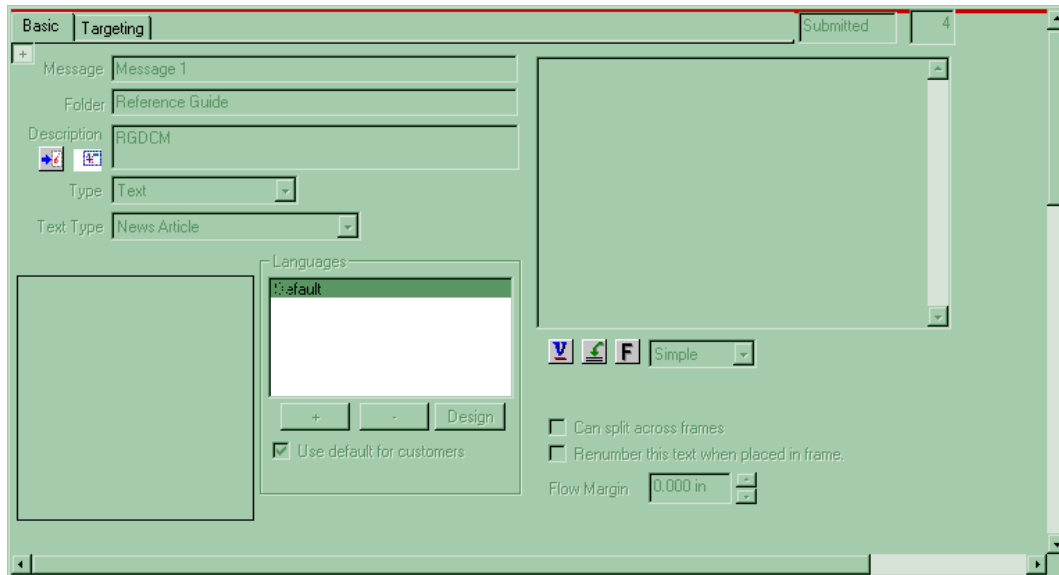
If you open an object, such as a *message*, in the **Property Panel**, it will look similar to the following figure.

Property Panel



NOTE: If a red line appears across the top of the **Property Panel**, you do not have read/write access to the object. You can view the dimmed properties, but you cannot edit them because they are not available to you. The person designated as *system administrator* usually sets these permissions.

Red Line Indicating Restricted View



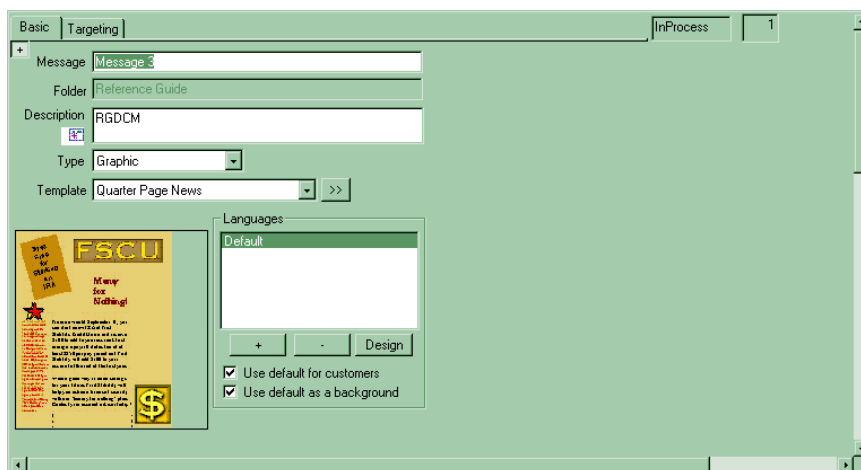
Viewing Tabs

In most **Property Panel** views, *properties* are arranged on tabs. The preceding example shows four tabs for messages: **Basic**, **Targeting**, **Internet**, and **Jurisdictions**. Other objects have different sets of tabs. To view or edit the properties, click on the tab with properties you want to view or edit. When you place your pointer over a tab, that tab will be highlighted.

Viewing Thumbnails

When you view the properties of *graphic objects* (pages, messages, and message templates), a thumbnail picture of the object is displayed on the **Property Panel**. The thumbnail provides a visual image of the object. If you double-click the **thumbnail box**, Dialogue automatically launches Dialogue Designer so you can edit the object. You can also click the **Design** button to go to Designer. If the thumbnail is blank, the object has not yet been designed.

Thumbnail View of Message in Property Panel



Object Properties

NOTE: The *thumbnail* is created when the object is saved in Designer. If you change the object in the Designer while viewing the object in the **Property Panel**, the new thumbnail will not appear until you save the object in Designer and close and reopen the object in the **Property Panel**.

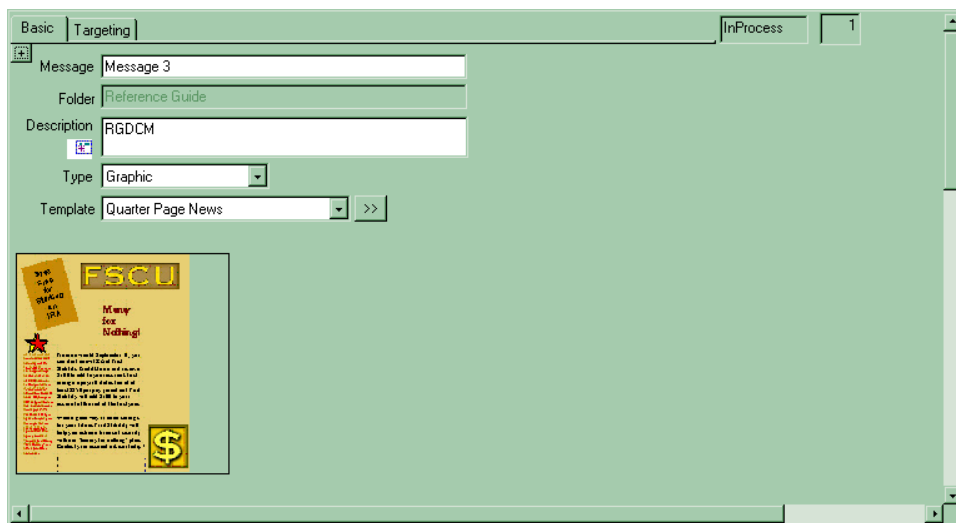
Expert Mode

There is a **Plus** button at the top left corner of the **Property Panel** in Dialogue Content Manager. When this button is depressed, it indicates that you are in **Expert Mode**. It means that additional options become available. These additional options are not required for the basic operation of the system. This **Expert/Basic Mode** functionality is available in several areas of Dialogue.

Basic Mode

When the button is not depressed, it means you are in **Basic Mode**. Notice that in the following figure, in **Basic Mode**, you do not see the **Languages** option. **Basic Mode** hides options not required for the basic functionality of Dialogue.

Message in Basic Mode



Mode Settings

Try working in both **Expert** and **Basic** modes, if they are available to you, to see which makes your job easier. When you depress the button, it remains depressed until you reset it.

Mode Control

The **Expert/Basic Mode** functionality is controlled in the **System Settings** by the System Administrator. Each **User Group** has controls that determine the functionality for a group of users. This setting is controlled by the **Expert Menus** option.

There are three options for using the **Expert/Basic Mode** functionality. **Either Expert Menus** are on, off, or you have the ability to toggle back and forth between them.

Dragging Objects from the Library to Input Fields on the Property Panel

Drag and Drop is Active in the Property Panel

You can drag *objects* from the *Library* into some input fields on the **Property Panel**, for example, the **Messages in Campaign** field on the **Contents Tab** of a campaign displayed in the **Property Panel**, as displayed in the following figure.

Campaign in Property Panel

The screenshot shows the 'Property Panel' with the 'Contents' tab selected. The campaign name is 'Campaign 1'. The 'Folder' is 'Reference Guide'. The 'Description' is 'RGBDC'. The 'Teaser' is 'No Teaser'. The 'Messages in Campaign' field shows 'Message 7'. There are plus (+) and minus (-) buttons below the 'Messages in Campaign' field. The 'Media' and 'Template' fields are empty.

You can add messages to a campaign from the **Library** by dragging them into the **Messages in Campaign** window in the **Property Panel**. The *cursor* shows a **plus sign (+)** before you drop the messages to indicate that it will be added to the list. When you drag an item, it will not be allowed if it is the wrong type of item and you will see the **Not Available** icon (⊘).

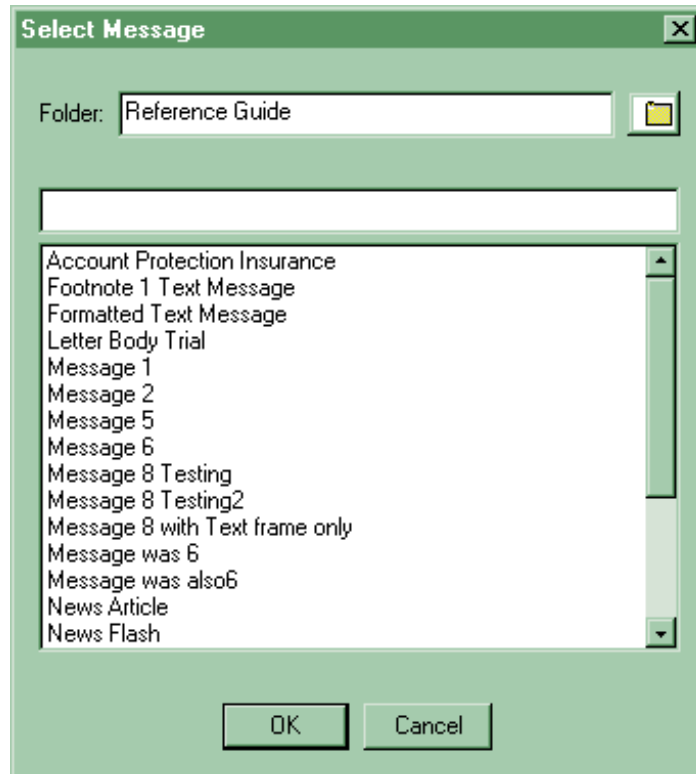
Adding Objects with the Plus Sign Button

Alternately, you can click the **Plus Sign (+)** button below the **Messages in Campaign** window to cause a list of messages, the **Select a Message** dialog box, to pop up.

1. **Select** the message you want from the dialog box, or type it in the text box.
2. Click **OK**.

Object Properties

Select a Message



TIP: As you begin to type text in the text box in the popup list, Dialogue will advance you in the list. For example, if the object you want begins with “B” and you type “B,” the list will advance to the beginning of the “B’s.”

Editing Options

Options are available when choosing objects from combo boxes in Content Manager and Designer. **Editing Options** appear when you right-click on buttons and combo boxes. The choices available depend on the clicked object.

- ◆ **Select** does the same thing as clicking in the area or on the button, bringing up a dialog to choose the object or variable.
- ◆ **Select All** selects all of the text in a text area.
- ◆ **Explain Colors** brings up a dialog box that gives the meaning of the colored variable text in variable names.
- ◆ **Undo** reverses the last action, if the object has not been saved since the last action.
- ◆ **Copy** makes a duplicate of the current item and sends it to the clipboard.
- ◆ **Paste** places the duplicate in any valid location.
- ◆ **Delete** clears the object from the area.
- ◆ **Properties**, when available, brings up the properties of the object. This option is only available from controls inside the **Property Panel**. For example, Properties would not appear in the application button in the **Build Production Package File** dialog box.

- ◆ Edit lets you edit the object, either in Designer or in the content view. If an object is not editable (like variables), this option will not appear. Like Properties, it is only available from within the **Property Panel**.

Deleting Messages by Dragging

With the campaign in the **Property Panel**, you can delete a message from the campaign. Select the message you want to delete from the **Messages in Campaign** list and click the **minus sign (-)** button below the window.

Saving and Exiting the Property Panel

Dialogue Manager automatically saves all changes you make to the object displayed in the **Property Panel** if you quit the program or open another object in the **Property Panel** while the first is being displayed.

You can also use any of these toolbar buttons to save, cancel, or reset the panel:

- ◆ **Save**—to save the changes you made and leave the panel open.
- ◆ **Save and Exit**—to save the changes and close the panel.
- ◆ **Exit without Saving**—to close the panel without saving changes.
- ◆ **Reset**—to reset the properties on the panel to the last-saved values.

NOTE: Be sure to make the **Property Panel** active by clicking on it before you click the toolbar button.

7.2 The Edit Panel

The **Edit Panel** is the lower right panel. You can use the **Edit Panel** for editing the contents of applications, campaigns, and documents, and for editing graphics.

IMPORTANT NOTE: Two users cannot edit an object at the same time. Dialogue Manager checks the object and issues a message stating that another user is currently editing the object.

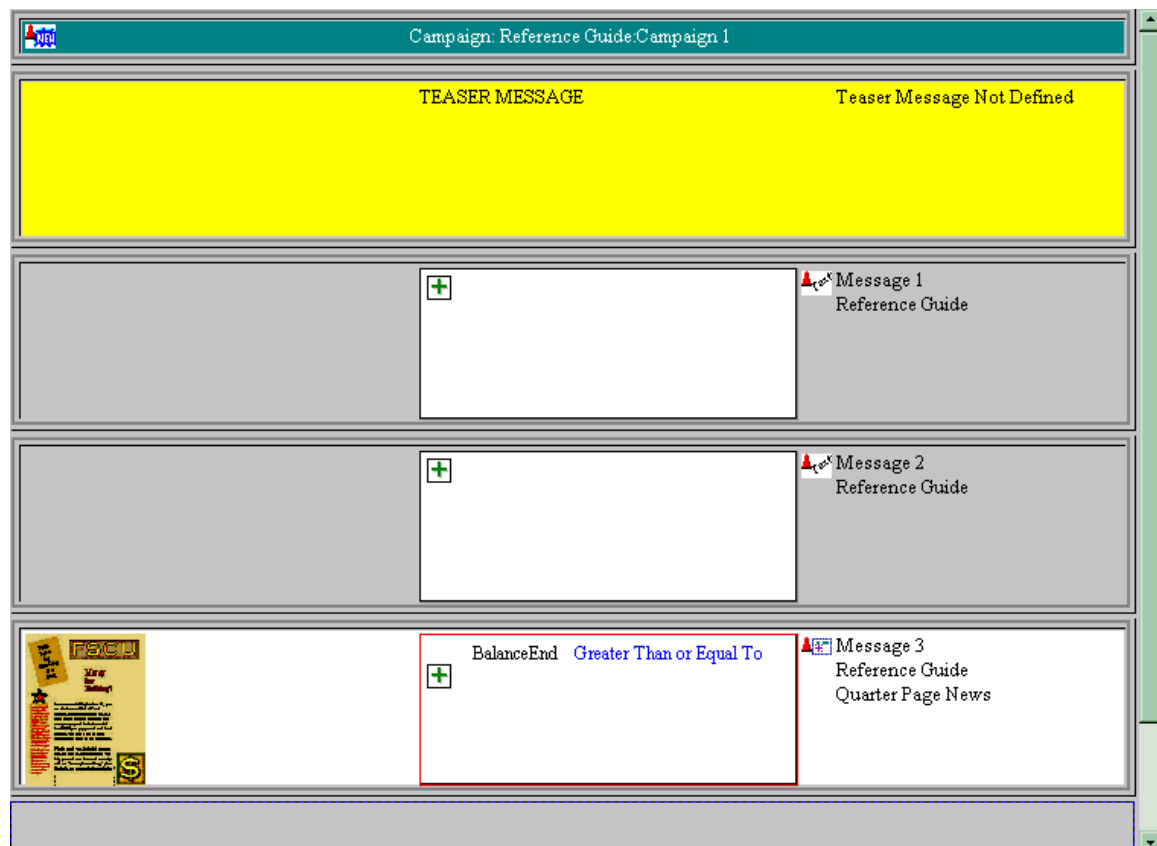
Content Editing

Using the **Edit Panel** to edit the contents of applications, campaigns, and documents provides a way to see all the objects, a thumbnail of each object, any rules associated with each object, and some of the key properties of each object.

Displaying a Campaign in the Edit Panel

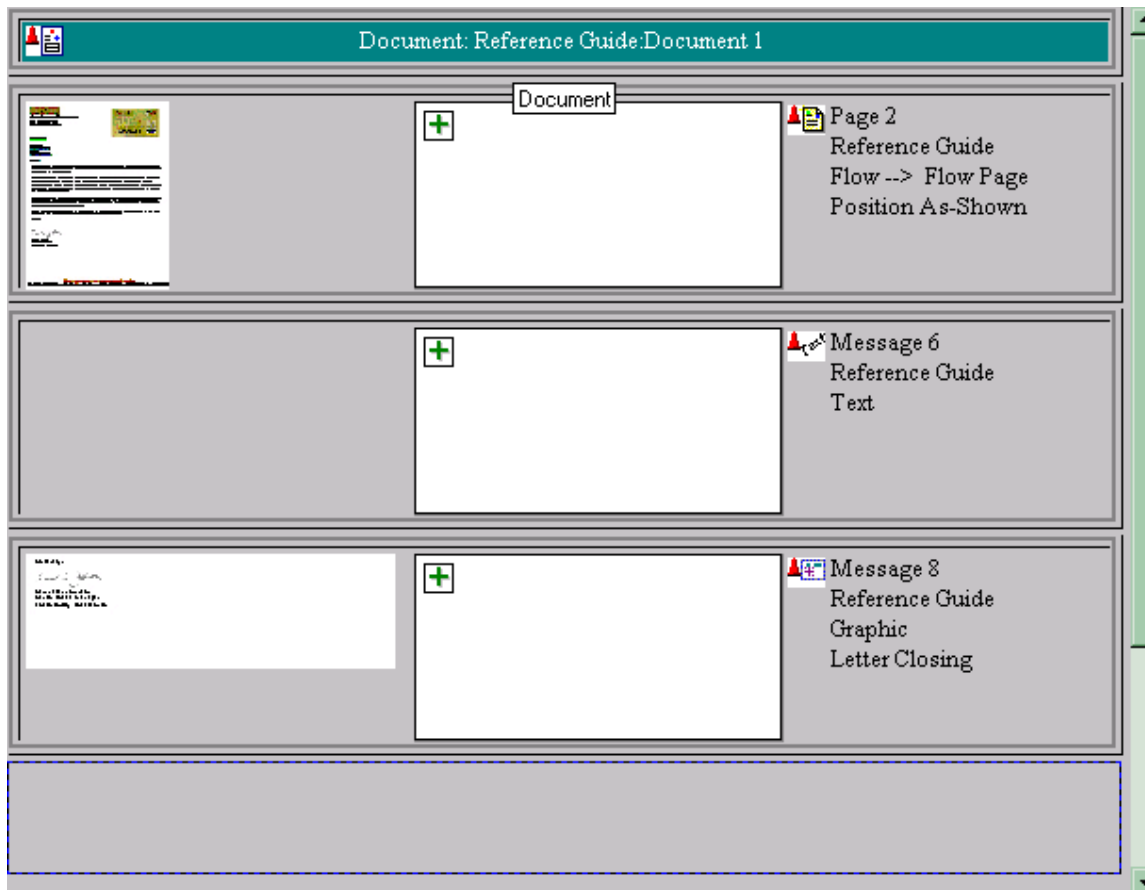
When you drag a campaign onto the **Edit Panel**, all the messages included in that campaign are displayed, as shown in the following figure. This list of objects will be the same one that appears under the campaign in the tree. You can add objects, delete objects, and change the order of objects when you are in the **Edit Panel**. Documents display in much the same way.

Campaign in Edit Panel



Displaying a Document in the Edit Panel

Document in Edit Panel

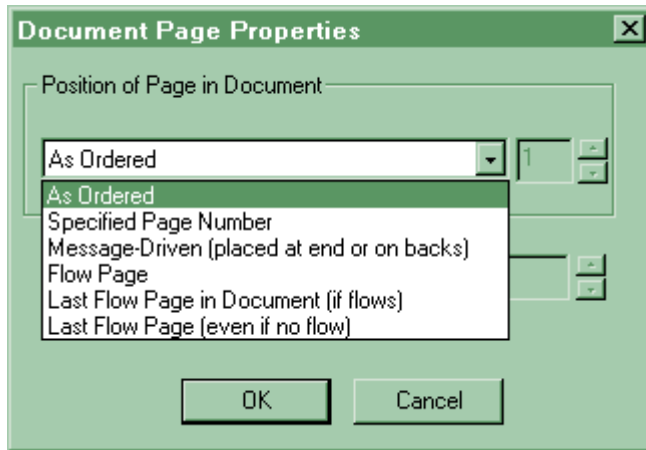


When you display a document in the **Edit Panel**, the properties on the right give you information about each page in the document. Some document properties are only available from this view. Double-click on any page that has the ability to flow to another page, such as the first page in the preceding figure, and you can access the flow properties of the page.

If you double-click the properties area of a page in a document, the **Document Page Properties** dialog box is displayed, as shown in the following figure.

Object Properties

Document Page Properties



IMPORTANT NOTE: Some of the flow properties are only available when you perform this operation, such as the ability to specify a page as the **Last Flow Page**. See the [Reference Guide to Basic Document Composition](#) for more information.

Selecting an Item while it is in the Edit Panel

To select an item in the **Edit Panel**, click once on the list name, thumbnail, rule, or properties area of the item. If the item is in an application or document, a red box appears around the area you selected. After you select an area of an item, you can right-click to display the shortcut menu for a list of available functions or you can select a function from the **Menu Bar**.

Shortcut Menu Accessed by Right-Clicking a Document Page in the Edit Panel



Double-Clicking Thumbnails

A *thumbnail*, or small picture, of each item included in the object is displayed on the left. Double-clicking on a thumbnail automatically opens the Designer so you can edit the message or page.

Double-Clicking the Rules Area

When a campaign, or document is displayed in the **Edit Panel**, you can double-click on the **Rules** area of an item to add a rule to the object or edit the existing rule. When you double-click the **Rules** area, the **Rule** dialog box is displayed. If you change this rule, it changes the targeting rule for the object throughout the software.

Rule Dialog Box

Rule

Rule

Code

Unnamed Rule

Watch Level: None

Code Trace: None

Validate

Variable	Condition	Compare To
	Equal To	
and	Equal To	
and	Equal To	
and	Equal To	
and	Equal To	

Include 1

Make Library Rule

OK Cancel Help

Double-Clicking to Display the Properties of Campaigns

When a campaign is displayed in the **Edit Panel**, you can double-click on the teal colored **Title Bar** above it to display the properties in the **Property Panel**. You can also right-click on it to get the *shortcut menu*.

Right-Clicking on the Properties Area of Components of Campaigns and Documents

When a campaign or document is displayed in the **Edit Panel**, you can display each *component* object in the **Property Panel**. Do this by right-clicking on the properties area of the object to display the shortcut menu and select **Properties**. (The properties area is the area on the right side of the object next to the rule box that lists the name of the object and other information, such as the name of the message template and message type.)

When a *campaign* is in the **Edit Panel** and you double-click the properties area of a *component*, the properties are shown in the **Property Panel**.

You can edit the *properties* in the dialog box. Click **OK** when you are finished.

Dragging a Referenced Item

You can drag a referenced item in the **Edit Panel** to perform several functions:

- ◆ You can drag a message within the **Edit Panel** to change its order in the campaign, document, or application.
- ◆ You can drag a message, page, or document from the **Edit Panel** onto the **Property Panel** to edit its properties.
- ◆ You can add a new message or page to the campaign or document by dragging a message or page from the *Library* list onto the **Edit Panel**.

Saving and Exiting

To save the changes you made to the object, make sure the **Edit Panel** is the active panel by clicking anywhere on the **Edit Panel**. Then click the **Save and Exit** button on the toolbar.

Graphic Editing

To use the **Edit Panel** as a shortcut for graphic editing, drag the object you want to edit to the **Edit Panel** and Dialogue Manager automatically launches Dialogue Designer. You can also use the button on the **Toolbar**. See the [Reference Guide to Dialogue Designer](#) for more information about graphic design.

Chapter 8: Rules on Objects

8.1 Rules

Dialogue allows you to assign rules to Dialogue *objects*, such as *campaigns*, *messages*, *pages*, and *documents*. These objects can be found in the **Library** in Dialogue Content Manager. Rules themselves can be saved as objects in the **Library**.

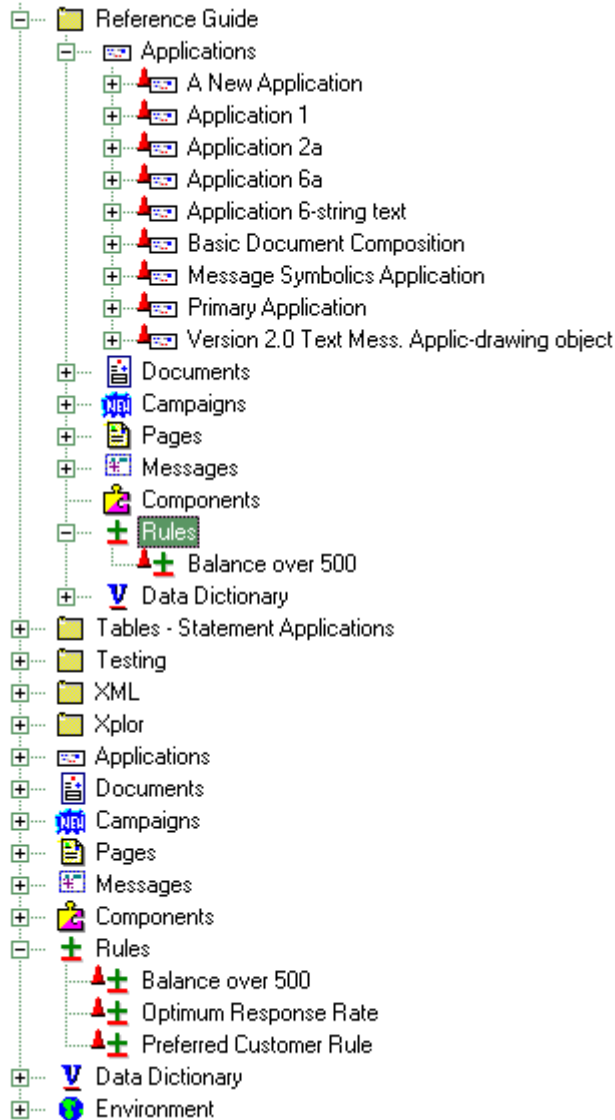
When you begin to use Dialogue Designer, you will find that you can also assign rules to *drawing objects* in Designer. When you compose your application, Dialogue evaluates the rules to determine what should be composed or sent to a customer. You can assign rules to messages, pages, documents, and campaigns. For example, you could create a message and assign a rule to it so that it is sent only to customers with a balance of more than \$1,000.

When you begin to use Designer, you will also find that you can assign *rules* and *codes* to *objects* **within** *messages* and *pages*. This gives you control at every level of your document.

8.2 Rules in the Library

You can save your rules in the **Library**, so that you can name them and reuse them throughout Dialogue.

Rules in the Library



Like other objects in Dialogue, you can save your rules in your working or project folders, or in the *root folder*.

Rules on Objects

Rule in Property Panel

The screenshot shows a dialog box titled "Rule in Property Panel" with a green border. At the top, there are two tabs: "Basic" (selected) and "InProcess". To the right of the "InProcess" tab is a small box containing the number "1". Below the tabs, there are three input fields on the left: "Rule" with the text "Balance over 500", "Folder" with the text "Reference Guide", and "Description" which is empty and has a small green plus icon to its left. To the right of these fields is a large text area labeled "Logic" containing the following text:

```
IF(BalanceEnd >= 500) THEN
  INCLUDE
END IF
```

Rules are saved with their **Rule** name, their **Folder**, the **Description** (if you have typed a description), and the **Logic** for the rule. **Library Rules** can be dragged and dropped on all rule dialog boxes. They cannot be dragged in the **Library** except to another folder.

Unnamed Rules

Rules that reside only on an object are called **Unnamed Rules**.

Unnamed rules can be converted to Library rules with the **Make Library Rule** button.

Library rules can be cloned into an unnamed rule with the **Make Unnamed Rule** button.

Removing Library Rules

Library rule references can be removed with the **Remove Rule** button, which becomes available when a rule is present.

8.3 Assigning a Rule to an Object

To assign a *rule* to a message or other *object* in the **Library**:

1. Select the message in Dialogue Manager and drag it to the **Property Panel**.
2. The message is displayed in the **Property Panel**.

Message Basic Tab in Property Panel

The screenshot shows the 'Basic' tab of the Property Panel for a message named 'Message 1'. The 'Folder' is 'Reference Guide' and the 'Description' is 'RGDCM'. The 'Type' is 'Text' and the 'Text Type' is 'News Article'. There is a 'Languages' section with a 'Default' language and a 'Design' button. A 'Flow Margin' of '0.000 in' is set. The 'InProcess' status is '4'.

3. Select the **Targeting** Tab.

Message Targeting Tab in Property Panel

The screenshot shows the 'Targeting' tab of the Property Panel for the same message. The 'Rule' section is empty. The 'Tracking' section shows 'By Customer' and a date range '5/7/2001 to 5/7/2014'. The 'Virtual Message Identifier' section is empty.

Rules on Objects

NOTE: In Designer, you can assign rules to graphic objects (like textboxes) so that they appear or disappear for certain customers. The **Rule** dialog box for graphics is the same as the following dialog box. However, be sure to read how rules function with graphic objects in the book [Reference Guide to Dialogue Designer](#). Rules do not always have the same behavior, according to their associated object.

Rule Dialog Box

1. To define a *rule*, click the plus sign (+) in the Rule area.
2. You will see a dialog box similar to the following figure.

Rule Dialog Box

Rule

Rule

Code

Unnamed Rule

Watch Level: None

Code Trace: None


Validate

Variable	Condition	Compare To
	Equal To	
and	Equal To	
and	Equal To	
and	Equal To	
and	Equal To	

Include 1

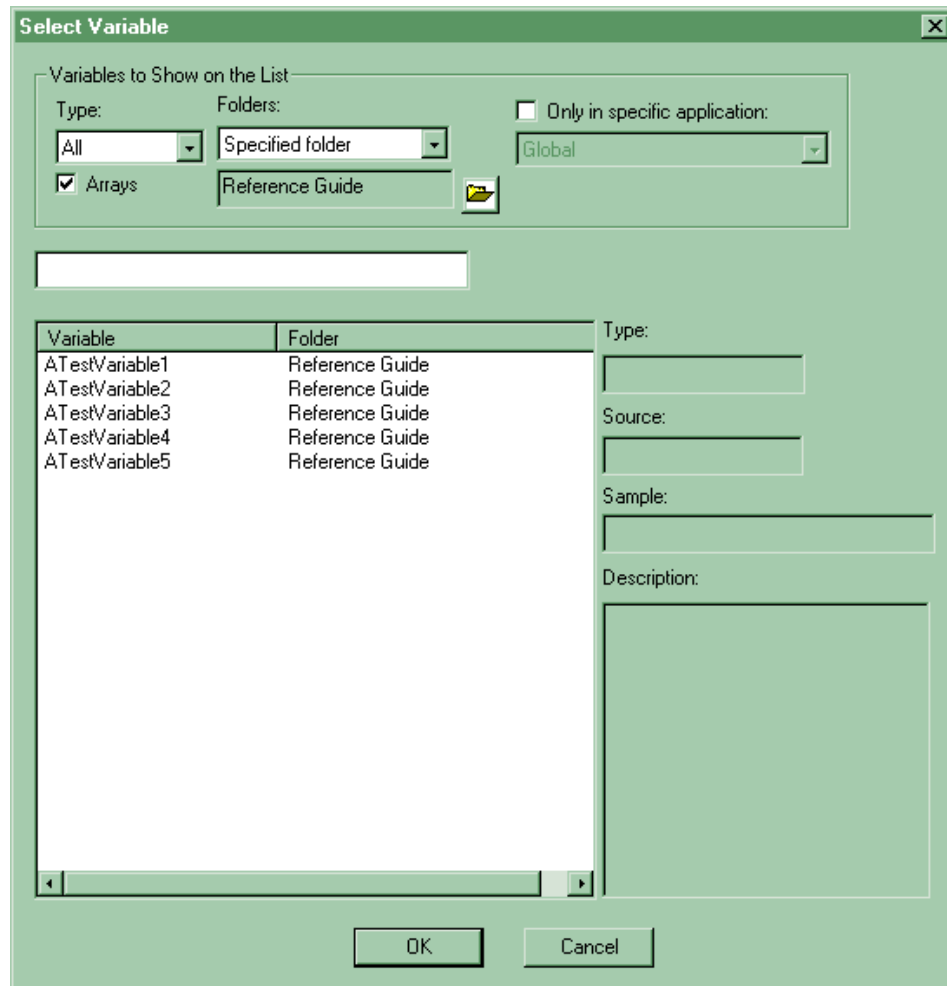
Make Library Rule

OK Cancel Help

3. When you click the **Variable** button  in a combo box, the **Select Variable** dialog box appears.

Select Variable Dialog Box

Select Variable



1. On the **Select Variable** dialog box, you can choose the variable you want to use from the **Variable** list.
2. By using the options, you can limit the choices available on the **Variable** list, as to the:
 - ◆ **Type**
 - ◆ **Folder**
 - ◆ **Application**
 that is displayed in the **Variable** list.
3. If you have chosen the **specified folder** option under **Folders**, click the **Folder** icon to display a list of available folders from which to choose the variables. (Dialogue will remember the last folder used, and this will appear by default the next time you open the **Select Variable** dialog box.)
4. **Choose** the variables you want to use from the **Variable** list. Information about the variable is displayed to the right of the list.
5. Click **OK** to exit the **Select Variable** dialog box. After selecting a variable, you are returned to the **Rule** dialog box.

Completing the Rule

1. Use the **Condition** combo box to use **Greater Than**, **Less Than**, and **Equal To** (and so on) comparison functions.
2. Use the **Compare To** combo box to finish your rule by typing an amount, date or number that will limit your message to the intended group of customers. Variables are also available by using the **Variable** button so that you can compare one variable to another.
3. Dialogue Manager allows you to define up to five levels of **Rules** using the **and/or** linking arrow.

Include Text Box

The function of this option, in its simplest form, is the number of this object to include in the application. The pop-up help reads, "The value to be set if this rule is true." However, be aware that it functions differently according to the object to which it is attached.

It does control the number of objects to include when used on a document, page, message, campaign, or campaign message. For Campaign objects, you can include up to the number of times allowed as set in **System Settings, Campaign Variables**.

1. If the **Include** check box is not selected, the rule will exclude the object if the condition applies.
2. To view the code generated from this rule in Dialogue Manager, click the **Code** button. Click it once again to return to the main dialog box.

NOTE: **Rules** make it easy to create selections from a list of values, and the **Code** button allows you to make selections that are even more complex. See the following item in this chapter, *Assigning a Complex Rule Code to a Message, Page, Campaign, or Document* to learn how to assign a **Code** to an object.

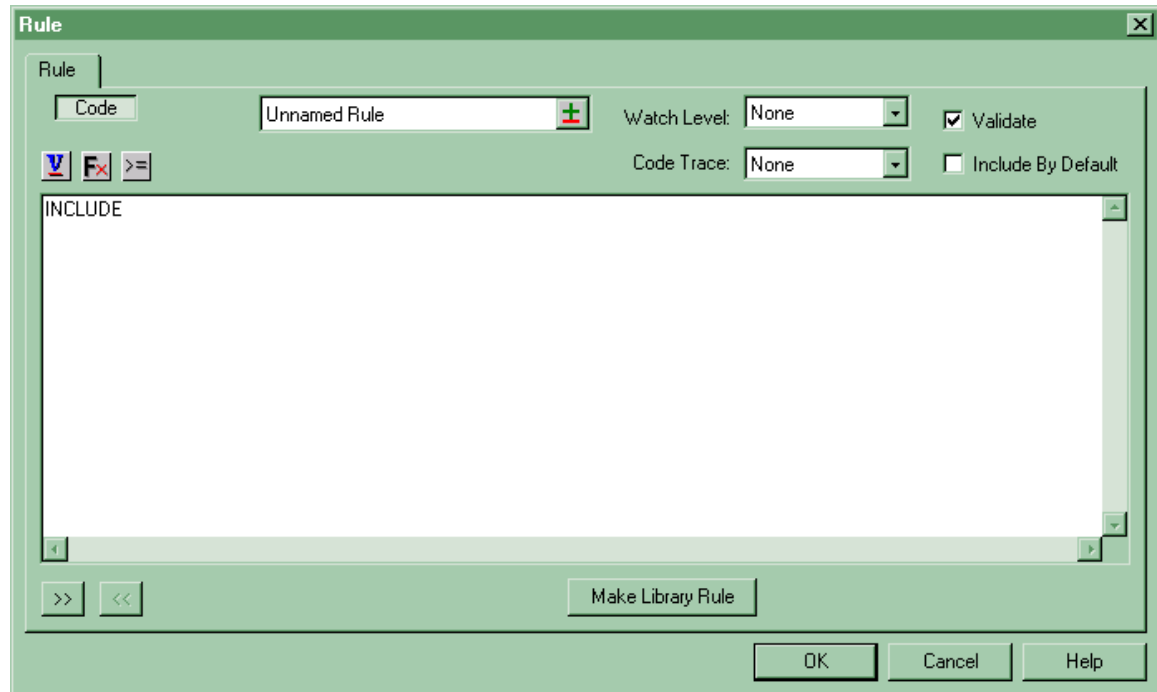
IMPORTANT NOTE: See the book [Reference Guide to Variables, Data Files and Data Mapping](#), for more information on *rules and formulas* and the options available for using formulas.

8.4 Assigning a Complex Rule Code to an Object

Code Panel

If your selection needs are more complex than those featured on the **Rule Tab**, press the **Code** button to display the following panel.

Rule Dialog Box with Code Button Depressed (Code Panel)



The **Code Panel** lets you type formulas in an open text box. As you type, you can use the buttons near the **Code Button** to insert a variable, function, or condition.

IMPORTANT NOTE: The default setting for **Rules** is to **include**. The default setting for **Codes** is to **exclude**. If you do not enter the **Code Panel**, and the **Rule** is set to include. The object will be included if the rule is met.

1. Check the **Include By Default** check box if you want this object to be included in processing if there are no rules to the contrary.
2. Check the **Validate** check box if you want to check this object before processing to see if there are errors in the formula or formatting. This is a good habit, and it will issue an error message if you try to click **OK** and the formula is not valid.
3. Place your pointer in the plain text box.
4. Begin typing a formula, or do the following:
 - a. Use the **Variable** button to access the **Select Variable** dialog box to choose a field in the database on which to base your selection criteria.

Select Variable Dialog Box

Select Variable

Variables to Show on the List

Type: Folders: Show variables assigned to application:

☒ Arrays

Variable	Folder	Type
1BeginningBalance1996		
1BeginningBalance1997		
1BeginningBalance1998		
1BeginningBalance1999		
1BeginningBalance2000		
a		
a_date_day		
aa		
AAA		
abc		
AccountNumber		
AccountNumberWithLowValue		
ActiontoTake-MoreInformation (n)		
Age		
AgentName		
AgentNum		
ANewApplicationVariable		
Annabelle		
Anniversary_Age		
AR_REFERRAL_ACCESS_CODE		
AreaofInterest (n)		

Type:

Source:

Sample:

Description:

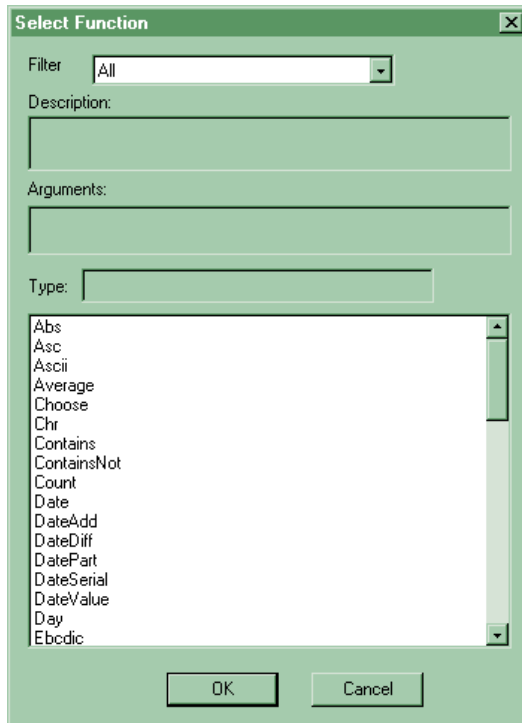
OK Cancel

NOTE: All of the selection dialog boxes can be filtered to show only certain types of objects. Explore this feature by clicking the arrow or icon next to the list boxes at the top of the dialog box.

- b. Use the **Function** button to choose a *function* from the **Select Function** dialog box.

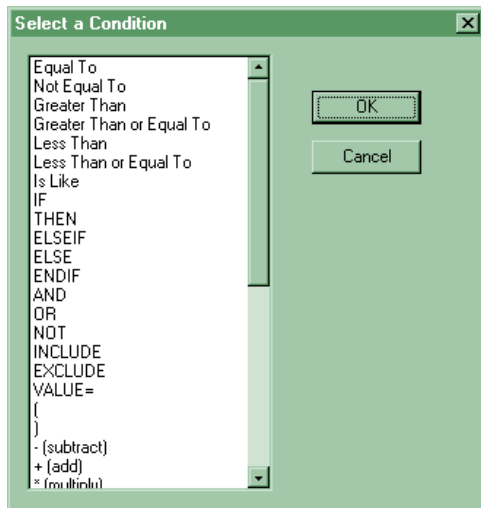
Rules on Objects

Select Function Dialog Box



- c. Use the **Condition** button to choose a *condition* from the **Select a Condition** dialog box.

Condition Dialog Box



5. Select the **Validate** check box to have Dialogue Manager validate that the rule is in the proper format before you click **OK**.
6. Click **OK**.

NOTE: The easiest way to remove a rule is to click in the white text box area. Highlight all the code you see and press the DELETE key.

IMPORTANT NOTE: See the book, [Reference Guide to Variables, Data Files, and Data Mapping](#) for more information on rules and formulas. It explains additional options not discussed in this book.

Chapter 9: Versions, Approval, and Object History

9.1 Version Control

Enabling Version Control

If your organization uses the **Enterprise Support Option**, Dialogue automatically tracks versions of applications, documents, pages, campaigns, and messages.

NOTE: Version control is enabled if your *system administrator* or other person with administrative rights to the system selected the **Enable Approval** check box in the **System Settings** on the **Enterprise Support Tab**. If the **Enable Approval** check box is not selected, version control is turned off.

IMPORTANT NOTE: You must use versions if your organization will be using [Regulatory Support](#).

Viewing the Version

There are two ways to determine the version of an object:

1. **Status Symbols**, icons displayed next to the object in the *Library*, indicate the version.
 - ◆ An orange cone indicates that the object is in process.
 - ◆ A green arrow indicates that the object has been submitted for approval.
 - ◆ A blue checkmark indicates that the object has been approved.
 - ◆ A lock indicates that the object has been archived. You will see this when you choose the **History** option under the **Manage** menu.

Status Symbols



The version *status symbols* change automatically when an object is **submitted** or **approved**.

2. When you open an object in the **Property Panel**, the version status and the number of the version are displayed in the upper right corner, adjacent to where the tabs appear. The number reflects how many times the object has been revised in its current version.

Version Display on Property Panel






An object is *archived* when a newer version of the object is approved. You will not see the *archived objects* unless you change your **Version** view. You can change your view by clicking the **Status Bar** at the bottom of your window.

9.2 History

You can also view all of the versions of the object that have ever been created by going to the **Menu Bar**, and clicking **Manage**, and then **History**. A list is displayed in the **Edit Panel**. There are many headings available in history to give you information about the object in all of its versions. Some of the headings are:

- ◆ **Name**
- ◆ **Description**
- ◆ **Folder**
- ◆ **Type (Layout)**
- ◆ **Class (Type)**
- ◆ **Template**
- ◆ **Version**
- ◆ **Status**
- ◆ **Create Date**
- ◆ **Approval Date**
- ◆ **Expiration Date (for Approval)**
- ◆ **Creator**
- ◆ **Approver**
- ◆ **Approval Notes**
- ◆ **Last Modified**
- ◆ **Modified By**
- ◆ **Expires (for Jurisdictions, if you use the Regulatory Support Module).**

History of Versions

Folder Reference Guide	Description	Folder	Type	Class	Template	Version	Status	Create Date	Approval Date
 Message 1	RGDCM	Reference ...	News Article	Text	None	5	InProcess	August 2 2001 14:17:06	-
 Message 1	RGDCM	Reference ...	News Article	Text	None	4	Approved	January 30 2001 16:59:09	August 2 2001 14:14
 Message 1	RGDCM	Reference ...	News Article	Text	None	3	Archive	January 30 2001 16:57:27	January 30 2001 16:57:27

A detailed explanation of **Versions** and **History** follows.

9.3 Versions of an Object

Versions have no effect until you submit an object for approval. When you need to make changes to it, you will begin to see more than one object in **History**.

Step 1 You create an object.
It is **InProcess**.



Step 2 You work with an object until you feel that it is ready. You submit it for approval.
It is **Submitted**.

You cannot make and save any further changes unless you unsubmit the object.

Step 3 The approver approves the object.
It is **Approved**.




Step 4 For whatever reason, you need to edit the object again. You open the object.
It is automatically placed in the **InProcess** status again.

History of Object in Dialogue Manager





Folder Reference Guide	Description	Folder	Type	Class	Template	Version	Status
 Message 1	RGDCM	Reference Guide	News Article	Text	None	2	InProcess
 Message 1	RGDCM	Reference Guide	News Article	Text	None	1	Approved

Step 5 As time passes, you may have new versions successively **InProcess**. Each time a version is **Approved**, the old **Approved** version moves back in the order of versions and becomes **Archived**.

History of Object in Dialogue Manager

Folder Reference Guide	Description	Folder	Type	Class	Template	Version
 Message 1	RGDCM	Reference ...	News Article	Text	None	3
 Message 1	RGDCM	Reference ...	News Article	Text	None	2
 Message 1	RGDCM	Reference ...	News Article	Text	None	1

Object as Versions are Added

Folder Reference Guide	Description	Folder	Type	Class	Template	Version
 Message 1	RGDCM	Reference ...	News Article	Text	None	4
 Message 1	RGDCM	Reference ...	News Article	Text	None	3
 Message 1	RGDCM	Reference ...	News Article	Text	None	2
 Message 1	RGDCM	Reference ...	News Article	Text	None	1

NOTE: Thus, only the latest version of the object will be **InProcess**, or **Submitted**, and there can only be one version that is **Approved**. The number of **Archived** versions that are saved can be infinite in Dialogue. However, the *system administrator* can limit the number of saved **Archived** versions to control excessive memory use when there are many users creating versions.

Version Views

When using Dialogue, you must select which versions of objects you want to view in the **Library**. (If you do not limit your list to one version, the list may grow to be too large for you to manage.) The version area displayed in the **Status Bar** shows your current view.

You can set your view to one of the following:

- ◆ **Latest** — to view the most recent versions of the objects
- ◆ **Approved** — to view only objects that have been approved for use in campaigns.
- ◆ **Submitted** — to view only objects that have been submitted for approval.
- ◆ **In Process** — to view only objects that have not been approved.
- ◆ **Archive** — to view only objects that are no longer used in campaigns.

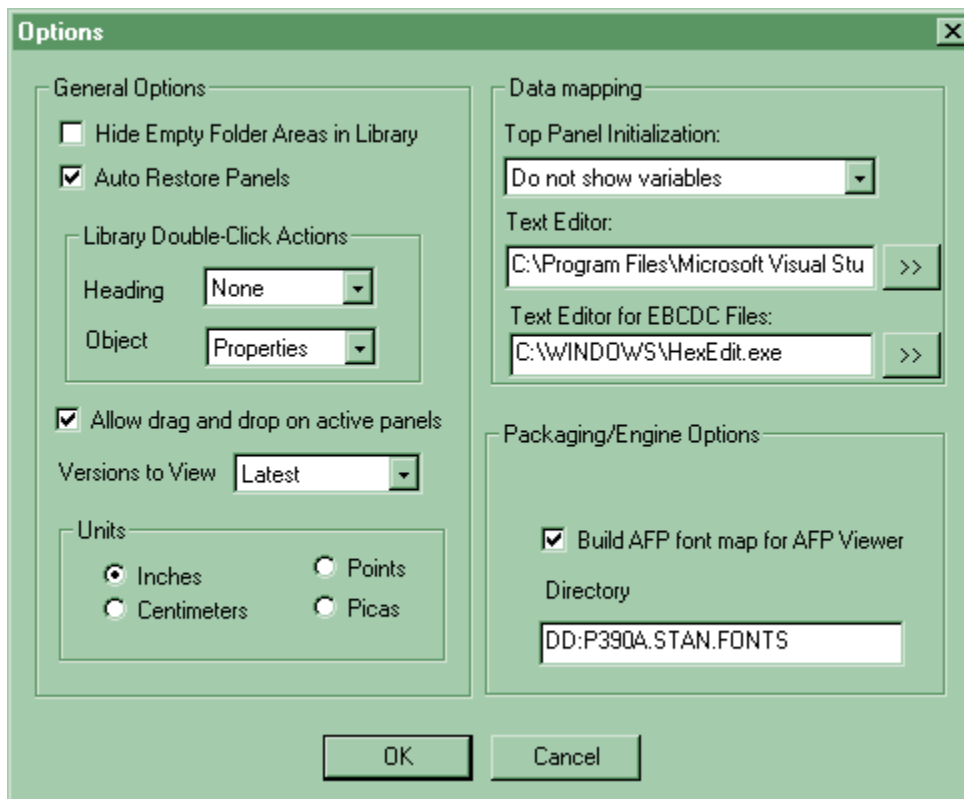
TIP: For general use, the most convenient **Versions to View** setting is **Latest**.

Changing Your Version View of the Library

To set your viewing options:

1. Click **Tools**, and then click **Options**.
2. The **Options** dialog box is displayed.

Options Dialog Box



TIP: You can also click the **Status Bar** to display the **Options** dialog box.

Versions, Approval, and Object History

3. Select the version of objects you want to view from the **Versions to View** drop-down list.
4. Click **OK**.

The **Library** view is changed to display only the versions of objects that you chose, and these versions are the only objects you can edit.

Suggested Views by Function

Normally:

- ◆ A designer would use the **Latest** view, or the **In-Process** view.
- ◆ An approver would use the **Submitted** view, or the **Approved** view.
- ◆ An application builder would use the **Approved** view, or the **Latest** view.
- ◆ A system administrator would use the **Latest** view, or the **Archive** view.

9.4 The Submission Process

Submitting an Object for Approval

Submitting an object for approval is a formal process in Dialogue. An object being submitted for approval should be in a finished state. Objects designated **Submitted** cannot be edited and their properties cannot be changed. The submission, however, can be cancelled and the status of the object will return to **InProcess**. You also cannot make changes to an **Approved** version when your view is set to **Approved**. You must change your view to **Latest**. See “Canceling Submission” in this chapter.

To submit an object for approval:

1. Select the object you want to submit for approval and then right-click to display the shortcut menu and select **Submit for Approval**. You can also click **Edit**, and then click **Approval**, and select **Submit for Approval**. The third way is to click the green **Submit or Approve** button on the toolbar from the **Property Panel** or **Edit Panel**.
2. The **Submit for Approval** dialog box is displayed.

Submit for Approval Dialog Box

Submit for Approval

Name: Message 1

Approval Date (initial date that this version is effective): May 2, 2002 12:02

Expiration Date (last date that this version is effective):
☒ No expiration date.
May 2, 2002

Approval and Version Notes

This message is being submitted with major changes - designer
Approved with changes - design manager

OK Cancel

3. The current date is displayed in the **Approval Date** field. The Approval Date determines when this object will be used in production processing. You can change the date if you want to make the submission effective at some point in the future.

Versions, Approval, and Object History

4. By default, the **No expiration date** check box is selected. If you want to add an expiration date, **clear** the check box and use the combo boxes to enter an expiration date.
5. Type any notes related to this version of the object in the **Approval and Version Notes** text box. Use this feature to indicate what has changed to the reviewer or approver.
6. Click **OK**.

The object is submitted for approval on the date you selected. Notice that the red cone next to the object changes to a green arrow to indicate the change in status.

NOTE: If you have your **Versions to View** set to **In Process** when you submit an object for approval, the object will be removed from the **Library** list. It is no longer **In Process**. It is **Submitted**. Change your view to **Submitted**, and you will see it again. You should always be aware of your **Versions to View** settings found on the status bar, or you might think you have “lost” an object when it does not appear in the **Library** list.

Approving an Object

To approve an object:

1. Select the object you want to approve and then right-click to display the shortcut menu and select **Approve**. Alternately, you can click **Edit**, and then click **Approval**, and select **Approve**, or drag the object to the **Property Panel** or **Edit Panel**, and click the green **Submit or Approve** button on the toolbar.
2. The **Approve** dialog box is displayed.

Approve Dialog Box

Approve

Name: Message 1

Approval Date (initial date that this version is effective): June 1, 2002 22:02

Expiration Date (last date that this version is effective): ☒ No expiration date. May 2, 2002

Approval and Version Notes

This message is being submitted with major changes - designer
Approved with changes - design manager

OK Cancel

3. The current date is displayed in the **Approval Date** field. You can change the date if you want to approve the object at some point in the future.
4. By default, the **No expiration date** check box is selected. If you want to add an expiration date, **clear** the check box and use the combo boxes to enter an expiration date.
5. Type any notes related to this version of the object in the **Approval and Version Notes** text box. The notes that were entered when the object was submitted are displayed in the text box.
6. Click **OK**.

The object is approved as of the date you selected. If your **Versions to View** is set to **Latest**, notice that the green arrow beside the object in the **Library** changes to a check mark to indicate that the object is approved. You can set a date in the future if you like, but keep in mind the version status of the object until that date.

Canceling Submission of an Object

To *unsubmit* an object for approval, select the object you want to *unsubmit* for approval and then right-click to display the shortcut menu and select **Cancel Submission**. The object is no longer submitted for approval.

Manage Menu – Managing Versions

On the **Menu Bar** in Dialogue Manager, you will see the menu called **Manage**. You can use this menu to control versions of your object. When you select this menu, it drops down to reveal options similar to the following figure. The available options will depend on the object you have open in the **Property Panel**, highlighted in the **Library** list, or in the **Edit Panel**.

Manage Submenu



Using this menu, you can perform the following operations:

- ♦ **Submit for Approval** – change from *In-Process* status, the version while the object is being designed, to *Submitted*.
- ♦ **Cancel Submission**- change from *Submitted* to *In-Process*.
- ♦ **Approve** – change from *Submitted* to *Approved*.
- ♦ **Unapprove** – change from *Approved* to *In-Process*. See the additional information following this list.
- ♦ **Make Work-In-Process** – allows an *Archived* version of an object to be copied to a *Work-In-Process* status. This allows you to “skip back” to an older version of the object.

Versions, Approval, and Object History

NOTE: Notice that you can only have one version of an object with the same name having the status, *Work-In-Process*. See the additional information following this list.

- ◆ Access the **History** of the object. The **Edit Panel** displays all the versions of an object and many columns of information about the existing versions of the object.
- ◆ **Jurisdictional Effectivity** displays the jurisdictions of the currently selected object.

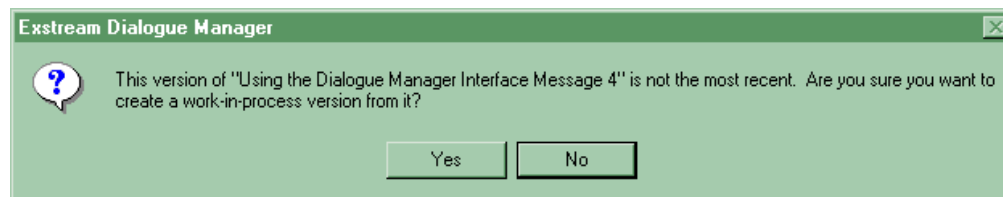
NOTE: Jurisdictions are available in the **Regulatory Support Module**, an add-on module for Dialogue.

- ◆ View **Where-Used** to see a list of all the places where the object was used.

Make Work-In-Process

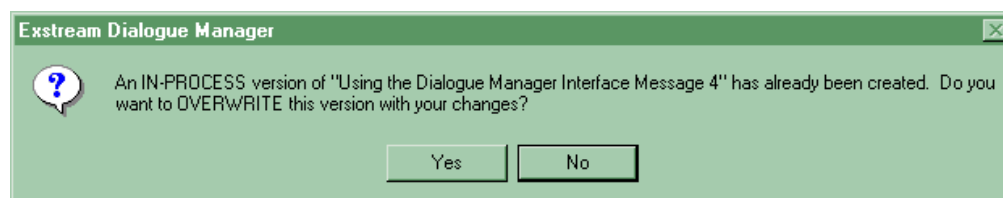
If you make an older version of the object **Work-In-Process**, it will supersede the current version and overwrite it.

Dialogue Message



If you already have an object that is a **Work-In-Process**, Dialogue will ask you if you are sure you want to do this. You will be deleting the existing Work-In-Process. (To prevent this overwriting, you can *clone* and *rename* the existing object, thereby making it a new object.)

Dialogue Message



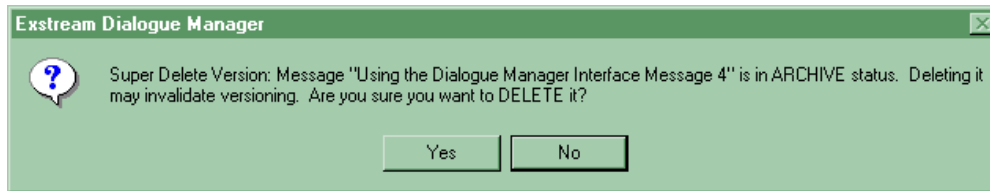
Unapproving Objects

The **Unapprove** option also moves the latest archived version (if any) to the *Approved* status. This response to your action will assure that there is a version of the message or other object available when the Engine is executed. If you do not want the older version to package, you can delete it from **History** in the **Edit Panel**.

Deleting Objects from History

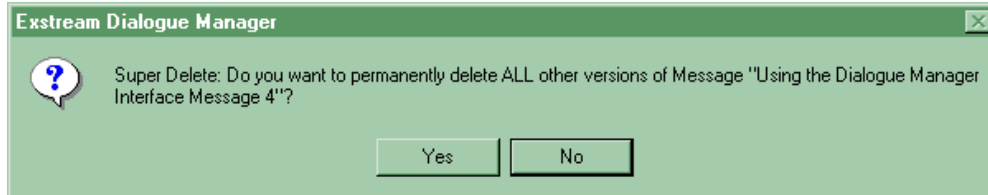
Right-click on the object in the **Edit Panel**. Choose **delete** from the shortcut menu. Dialogue will ask you if you are sure you want to delete it. Deleting an object will interrupt the chronological tracking of versioning. See the following figure.

Dialogue Delete Message



Dialogue will ask if you want to delete all versions of the message. Answer **No** unless you want to delete every instance of the message. See the following figure of the error message.

Dialogue Super Delete Message



Editing Versions of Objects from History

You can pull versions of objects from the **History** list when displayed in the **Edit Panel** to the **Property Panel**. Then you can click on the *thumbnail* to edit the object in Designer. If the status of the object is **In-Process**, you can edit and save the object in Designer.

If the object is in **Approved**, or **Archived** status (read-only status), a new **In-Process** version will be created. You must close the message in Designer and come back into it, to be able to save any changes you want to make.

Chapter 10: Multiple Languages

10.1 Enable Multiple Languages

In this chapter, you will learn to work with multiple languages, a very useful feature in the world economy that exists today. In the following sections, more advanced concepts are addressed. Be sure that you understand the preceding chapters to make learning easy. Dialogue gives you flexibility with its many easy-to-learn features.

If your distribution is worldwide, or includes areas that encompass more than one language, you will want to design versions for all major languages spoken in your target areas. This is called *multiple languages*.

In order to use *multiple languages*, your *system administrator* must **Enable Multiple Languages** in your system. This is a function of the **Enterprise Support Features**, found in **System Settings**, under the **Environment Heading**.

Benefits of Multiple Layers, One Basic Design

You can reduce redundancy by designing *graphic messages* and *pages* in *layers*. For example, if you need to move an image you used in the *default layer*, then you only have to move that image in one place and the change is reflected in all the other *language layers*.

The *language-independent (default) layer* can be used for one or both of the following purposes:

1. It can be sent stand-alone. Sometimes this is necessary for customers whose local language does not exist for a *message* or *page*. It may include text in the most widely spoken language of the audience, or the native language of the product or service. If this option is not selected, then the message will not be sent to a customer if the message is not available in the customer's language.
2. It can be used as a background for all language-specific layers, in which case it will not include text elements. Those will reside on each language layer.

NOTE: For *graphic messages*, which use templates, any graphics or text that are on the *template* you are using for the message will appear *behind* the *default language layer* when the message is designed and composed. You should be familiar with the templates that are available to you.

TIP: If you need to use layers in your layout, you can use the language layers feature and name these layers as you would layers in a design. For example, background layer, layer 1, or text layer. There is a limitation to the use of layers in that you can only use the template, the default layer, and one additional layer, but this should be enough to let you design graphic elements and text independently.

10.2 Language Layers

Language layers are created and controlled in Dialogue Content Manager. When you open a message in the **Property Panel**, you can see all of the language layers that exist for a message. You must initiate the design of the layer from Manager. After a layer has been started, you can then access it from Designer.

NOTE: To see **Language Layers** you must have the **Plus** button depressed, and be in **Expert Mode**.

Message in Property Panel with Language Layers

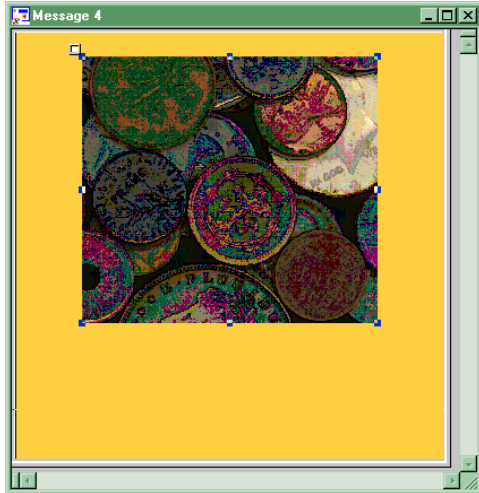


The following figure shows an example of a *graphic message* with a *default layer* (the layer that appears under all language layers after they are composed), an English layer, a French layer, and a Spanish layer.

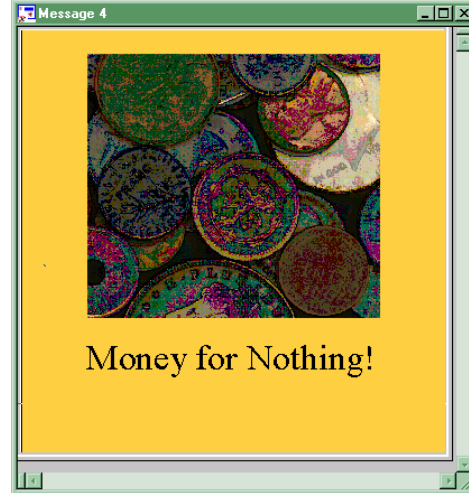
- ◆ As shown in the following illustration, the *default layer* contains design elements common to all versions.
- ◆ The *language layers* contain text, and any other elements (including graphics) that you want to appear only for certain languages or target populations.
- ◆ When you design a layer in a particular language, you will be working in Dialogue Designer. You can change to the dictionary for that language in **Designer Options**. This way, you can check spelling in the language you are using. See the [Reference Guide to Dialogue Designer](#) for more information about using Designer and Designer Options.

Multiple Languages

Default Layer



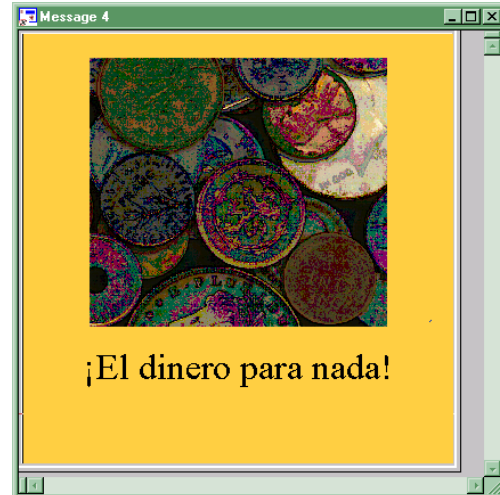
English Layer



French Layer



Spanish Layer



Language Layers and Processing Efficiency

When you place images on objects that have layers, and the image does not change, place it on the template or the default layer. This way, the image is only copied once in the output file. This makes for smaller files and faster processing when you have a large number of customers.

Language Layers on Pages

When you design a language layer for a **page**, the language applies to all objects on the layer. Consider this when designing text messages that flow into frames on each language layer of the page.

Determining a Customer's Language

The customer language is set by **data** in the **data file**. It is then mapped in Dialogue, by means of *variables*, so that the Engine can read it and select the appropriate language.

10.3 Creating Language Layers

IMPORTANT NOTE: To actually design all of the elements in a graphic message (a message that contains drawing objects), or a page, you must work in Dialogue Designer. See the book, [Reference Guide to Dialogue Designer](#).

TECHNICAL NOTE: If you have been working on a message or other object in Dialogue Designer, be sure you save and close the object in Designer before you start to edit the object properties in Dialogue Manager. This prevents your object from being overwritten.

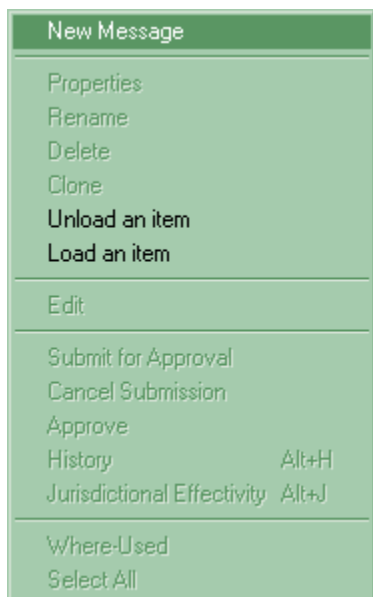
Lesson Three: Create a Message for Language Layers

LESSON NOTE: This section is organized as a simple lesson. This lesson shows you how to create a language layer for a message or page. Follow along by creating your own new message with language layers.

To create a message for language layers:

1. Go to the **Message Heading** in the **Library**.
2. Right-Click and select **New Message**.

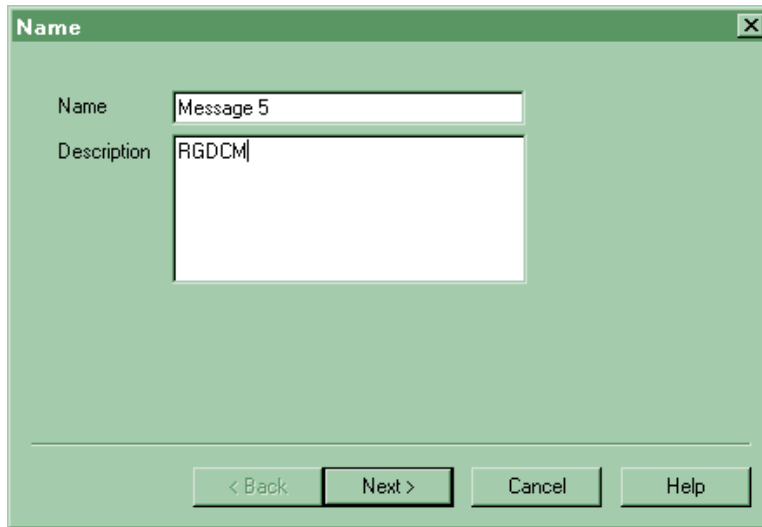
Create a New Message in the Library



3. The **Name** dialog box will appear.

Multiple Languages

Name Dialog Box



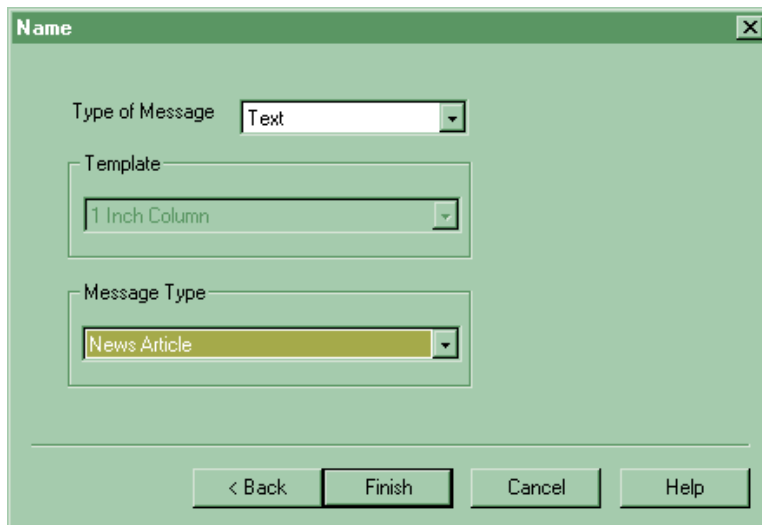
A screenshot of the 'Name' dialog box. It has a title bar with a close button. Inside, there are two labels: 'Name' and 'Description'. The 'Name' label is next to a text box containing 'Message 5'. The 'Description' label is next to a larger text box containing 'RGDCM'. At the bottom, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

4. Type a **Name** for the new message.

LESSON NOTE: Type **Message 5** for the exercise.

5. Type a **Description** for the new message.
6. Click the **Next>** button.

Second Screen in Name Dialog Box



A screenshot of the second screen of the 'Name' dialog box. It has a title bar with a close button. Inside, there are three labels: 'Type of Message', 'Template', and 'Message Type'. The 'Type of Message' label is next to a dropdown menu showing 'Text'. The 'Template' label is next to a dropdown menu showing '1 Inch Column'. The 'Message Type' label is next to a dropdown menu showing 'News Article'. At the bottom, there are four buttons: '< Back', 'Finish', 'Cancel', and 'Help'.

7. Choose **Text** as the **Type of Message** (the default setting).
8. Under **Message Type**, select one of the available message types from the list.

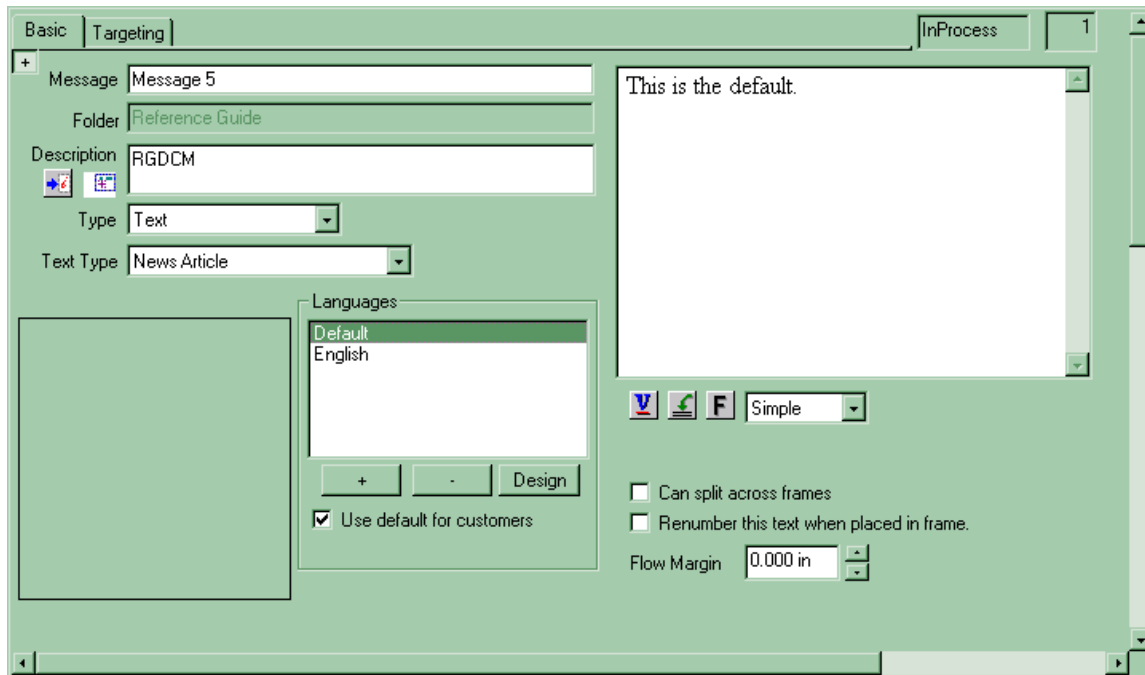
LESSON NOTE: Choose **News Article**.

9. Click **Finish**.

Your message is displayed in the **Property Panel**.

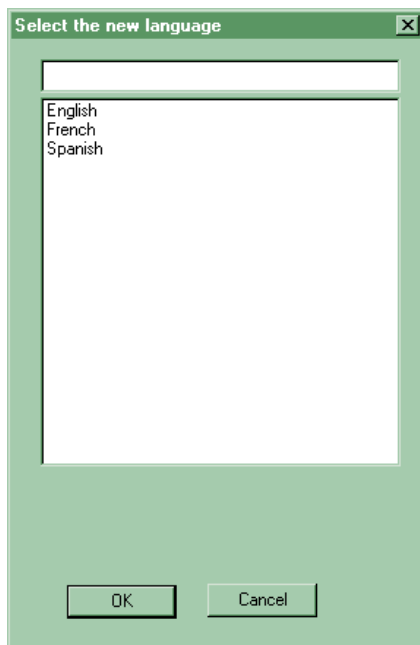
The Language Properties of the Multiple Language Message

Property Panel for Multiple Language Message



1. Select the **Use default for customers** check box to use the *default language* layer for any customers where there is no language defined for the customer.
2. To create and design a new language layer, click the **Plus (+)** button in the **Languages** area.
3. The **Select the New Language** dialog box is displayed.

Select the New Language



Multiple Languages

4. Select the language you want to create and click **OK**.

IMPORTANT NOTES: The list contains all the languages that have been defined for your system.
Your *system administrator* can add additional languages into the system.
If a message layer has already been created for a language, the language is not listed.

Multiple Language Layer Messages that Contain Only Unformatted Text

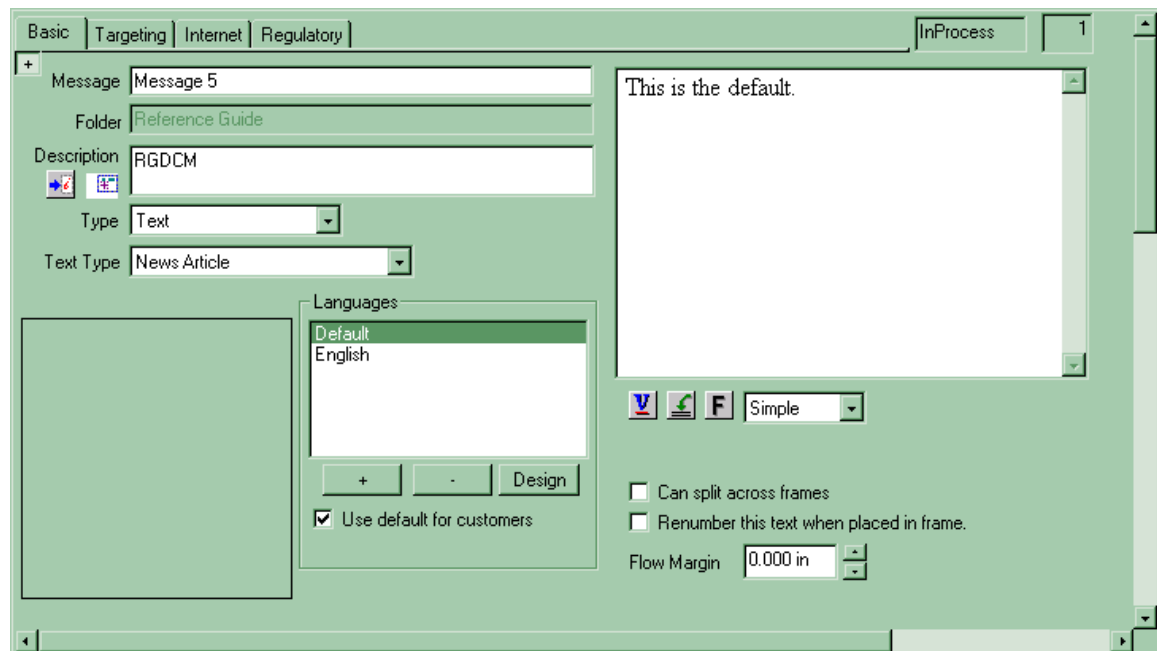
LESSON NOTE: Normally, you would not create a *default language layer* that contains only text. The other language layers would just print over it. This example is only to illustrate the creation of a layer in the simplest way possible.

1. Select the name of a *language layer* you have created in the **Languages** list in the **Property Panel** in **Dialogue Content Manager**.
2. Type or copy the text for the message into the text box on the right side of the **Property Panel**.

LESSON NOTE: **Type** This is the default layer of this message.

3. See the following figure.

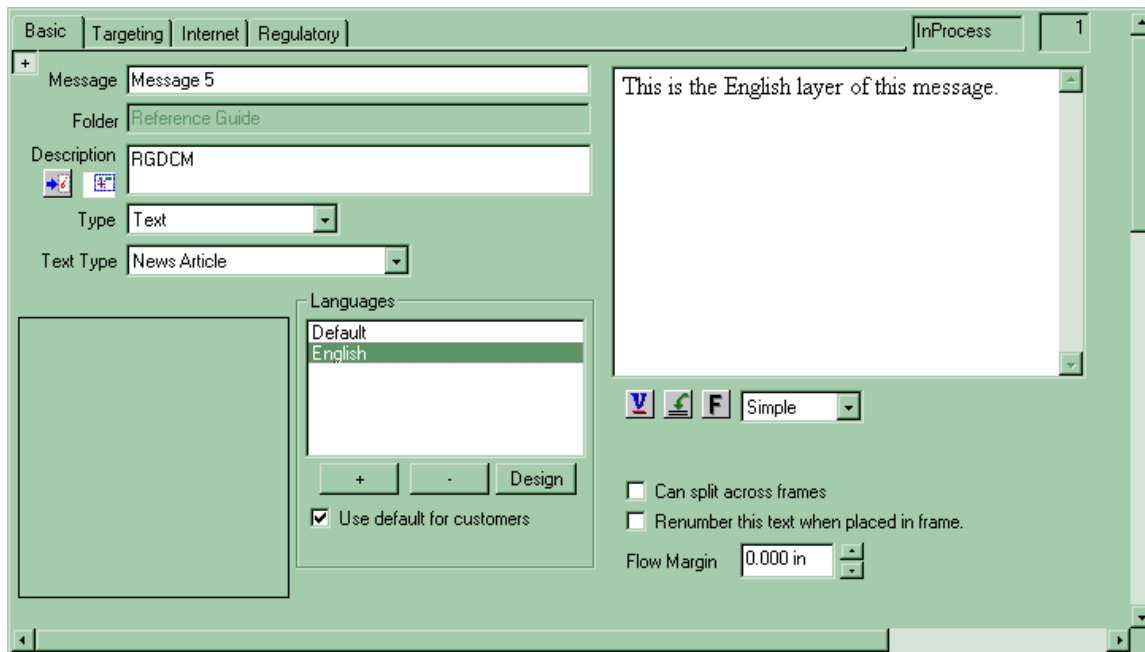
Default Layer of Message



4. Add the **English** layer under **Languages** by clicking the **+** button and selecting **English** from the list.
5. Be sure the **English** *language layer* is selected.

6. Type or copy the text for the message into the text box on the right side of the **Property Panel**, type This is the English layer of this message.
7. See the following figure.

English Layer of Message



8. You have created language layers for a text message.
9. **Save** your message.

LESSON NOTE: This is the end of Lesson Three.

Multiple Language Layer Objects that Contain Graphics

The procedure for designing a *language layer* that contains *graphics* is as follows:

1. In **Dialogue Manager**, drag the message into the **Property Panel**.
2. Create a new language layer, or select the name of a language layer you have created in the **Languages** list in the **Property Panel** in **Dialogue Content Manager**.
3. Click the **Design** button to open the new layer in **Dialogue Designer**.
4. Use **Designer** to create the new layer.

IMPORTANT NOTE: You can also create the language layers for an object directly in **Designer**. For details of graphic editing and additional design procedures, see the book, [Reference Guide to Dialogue Designer](#).

Additional Features of Language Layers

Language layers can be different sizes because it is possible for *language layers* to shrink and grow independent of the *default layer*.

Remember that graphics and text reside on *layers* in this order:

- ◆ The *template layer*
- ◆ The *default language layer*
- ◆ The specific *language layer*

IMPORTANT NOTE: Some languages take more words and characters to complete an idea than others do. Therefore, the space allowed for one message or slogan may not be sufficient for another language. To learn about messages that grow, see the book, [Reference Guide to Campaign Management](#).

Variable Processing and Language Substitution

When *variables* are processed, variables that are substituted onto *language-specific layers* will be in the customer's language only if the variable was created with multiple language values.

IMPORTANT NOTE: Keep these considerations in mind when designing for multiple languages. To learn about variables, see the book, [Reference Guide to Variables, Data Files, and Data Mapping](#).

Chapter 11: Advanced Features

11.1 Reporting and Troubleshooting Features for Applications

NOTE: This is an advanced topic. Beginning users of Dialogue should not expect to completely understand this information until they have had a chance to work with the software. Those who are not involved with reports, troubleshooting applications, or technical tasks in their organization do not need to know this information.

Dialogue includes some advanced features to help you list the objects in your applications and find errors in your applications at Engine run-time.

Custom Reports

One of the ways that you can find is the ability to create custom reports. You can use a custom report file to gather information on specific data in your output, and use this to report to your customers, management, or to any legal entities to which you are responsible. To learn more about *report files*, see the [Reference Guide to Variables, Data Files, and Data Mapping](#).

Application Reports

You can save an [Application Report](#) with a unique name to archive information about a particular application. This function is independent of a production Engine run. See the section in this chapter.

Trace/Watch/Debug

You can get information about when objects are included in an application, when rules and formulas are fired, and when values change for data, by using the [Trace/Watch/Debug](#) feature.

Programming Functions

Dialogue features some advanced programming functions, such as the ability to use **Dynamic Link Libraries**. See the [Reference Guide to Programming](#) for details.

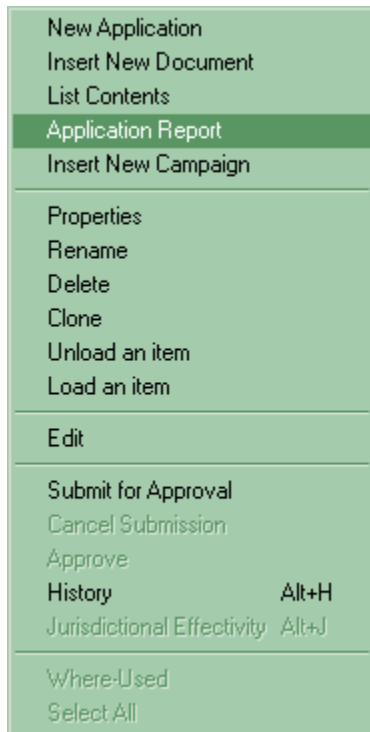
11.2 Application Reports

Applications are at the top of the hierarchy of objects in Dialogue. To help you see all of the objects in your application, Dialogue includes an **Application Report** feature. The **Application Report** allows you to select which objects to include in the report and at what level you would like the reporting.

Build the Application Report

1. **Right-click** on any application and select **Application Report** to choose the options and run the report.

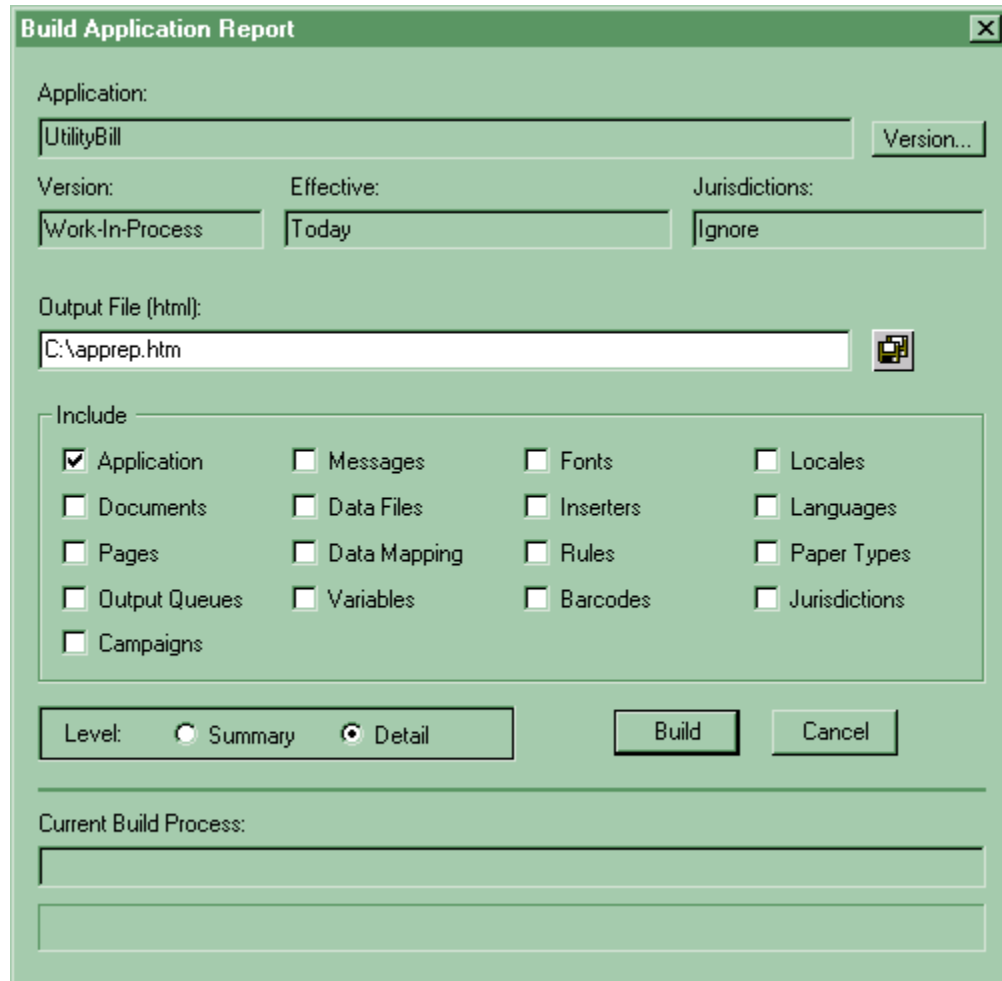
Shortcut Menu



After choosing the **Application Report** option, the **Application Report** dialog box appears where you can choose the options for your report. It will show you version information about the application at the top of the dialog box.

Basic Object Function

Build Application Report




The 'Build Application Report' dialog box is a green-themed window with a title bar and a close button. It contains several input fields and a list of checkboxes. The 'Application' field is set to 'UtilityBill' and has a 'Version...' button next to it. The 'Version' field is set to 'Work-In-Process', 'Effective' is set to 'Today', and 'Jurisdictions' is set to 'Ignore'. The 'Output File (html)' field is set to 'C:\apprep.htm' and has a file icon button next to it. Below these fields is a section titled 'Include' with a list of checkboxes: 'Application' (checked), 'Messages', 'Fonts', 'Locales', 'Documents', 'Data Files', 'Inserters', 'Languages', 'Pages', 'Data Mapping', 'Rules', 'Paper Types', 'Output Queues', 'Variables', 'Barcodes', 'Jurisdictions', and 'Campaigns'. At the bottom, there is a 'Level' section with radio buttons for 'Summary' and 'Detail' (selected), and 'Build' and 'Cancel' buttons. Below the buttons is a 'Current Build Process' section with two empty text boxes.

Build Application Report

Application: Version...

Version: Effective: Jurisdictions:

Output File (html): 

Include

<input checked="" type="checkbox"/> Application	<input type="checkbox"/> Messages	<input type="checkbox"/> Fonts	<input type="checkbox"/> Locales
<input type="checkbox"/> Documents	<input type="checkbox"/> Data Files	<input type="checkbox"/> Inserters	<input type="checkbox"/> Languages
<input type="checkbox"/> Pages	<input type="checkbox"/> Data Mapping	<input type="checkbox"/> Rules	<input type="checkbox"/> Paper Types
<input type="checkbox"/> Output Queues	<input type="checkbox"/> Variables	<input type="checkbox"/> Barcodes	<input type="checkbox"/> Jurisdictions
<input type="checkbox"/> Campaigns			

Level: ☐ Summary ☒ Detail

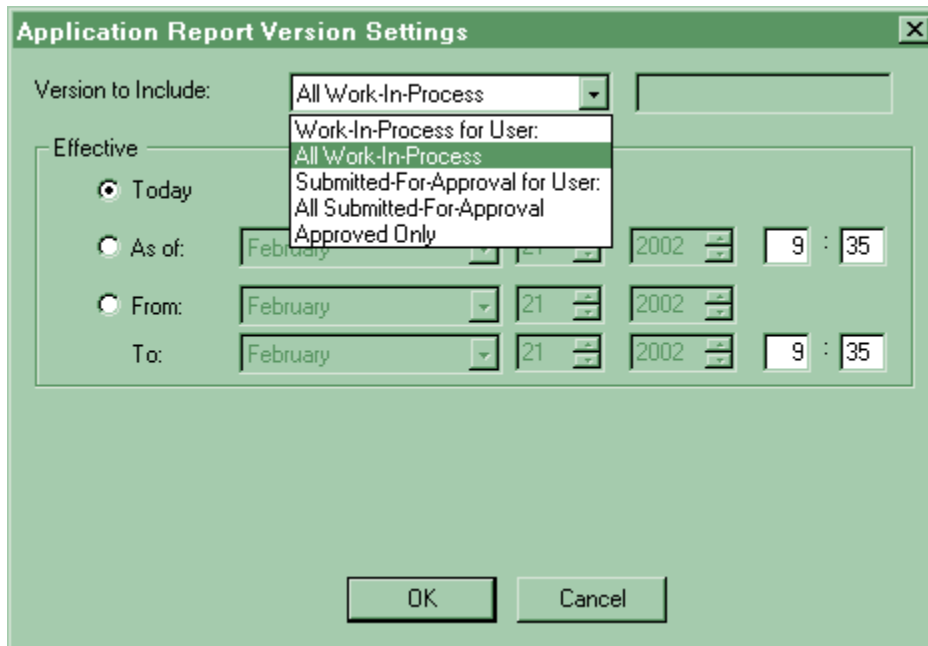
Current Build Process:

2. You can click the **Version** button to choose options for the versions to include in the report.

NOTE: You will not see the **Jurisdictions** category unless you have the **Regulatory Support Module**, and it is enabled in **System Settings**.

Application Report Version Settings Dialog Box

Default Settings for the Application Report Version Settings Dialog Box



1. In the **Versions to Include** list box, choose one of the following:
 - ♦ **Work-In-Process for User** – to include all of the **Work-In Process** versions of objects for a specified user, as well as any existing **Approved**, **Submitted**, and **Archived** versions for the specified user in the report. **Archived** versions are only included when using Regulatory Support.
 - If you choose this option, type a **User** in the adjacent box.
 - ♦ **All Work-In-Process** – to include all of the **Work-In Process** versions of objects, as well as any existing **Approved**, **Submitted**, and **Archived** versions as used for Regulatory Support in the report.
 - ♦ **Submitted-For-Approval by User** – to include all of the **Submitted** versions of objects for a specified user, as well as any existing **Approved** and **Archived** versions as used for Regulatory Support in the report.
 - If you choose this option, type a **User** in the adjacent box.
 - ♦ **All Submitted-For-Approval** - to include all of the **Submitted** versions of objects, as well as any existing **Approved**, and **Archived** versions as used for Regulatory Support in the report.
 - ♦ **Approved Only** – to include only **Approved** versions in the report.

NOTE: To be sure to get a version of all of the objects that may be used in the application, regardless of their version, choose **All Work-In-Process**.

2. In the **Effective** area, choose one of the following: **Today**, an **As of** date, or a range of dates **From** (and **To**) from the option buttons.
 - ♦ If you choose **Today**, you do not need to choose any more options in the **Effective** area.
 - ♦ If you choose **As of**, choose a date from the adjacent combo boxes.

Basic Object Function

- ◆ If you choose **From**, choose a start date from the adjacent combo boxes, and choose an end date from the combo boxes that are adjacent to **To**.

NOTE: To be sure to get the latest version of the objects that may be used in the application, choose **Today**.

IMPORTANT NOTE: If you are using **Jurisdictions**, you must use a range of dates to get the correct versions of the objects.

3. In the **Jurisdictions** area, choose one of the following: **All** to include all jurisdictions, or **Single** to include only one jurisdiction.


- ◆ If you choose **Single**, select the jurisdiction to include from the adjacent list box.

NOTE: If this area is dimmed, you have not defined any jurisdictions on your system.

4. If you do not want to include jurisdictions, select the **Ignore** check box.
5. Click **OK** to exit the dialog box.

Finish Selecting the Options for the Application Report

1. **Type** a name for the report file.
It must adhere to eight-character naming conventions and use a .htm extension.
Or, you can leave the default name and overwrite it every time.

Or, you can click the **Browse**  button to browse for an existing file to overwrite.
2. **Select** any of the check boxes in the **Include** area to include that object in your report.
3. Choose whether you want a **Summary** or **Detail** report in the **Level** area.
4. Click the **Build** button to create the report.

If the **Level** is set to **Detail**, it may take some time to build the report.

Hyperlinks in the Application Report

The report contains hyperlinks to the report area for each document, so it is easy for you to find information for each document in the application to ensure that the settings are as desired.

NOTE: For additional details about the **Application Report**, see the [Reference Guide to Basic Document Composition](#).

11.3 Trace/Watch/Debug

To assist you in finding errors in your applications, Dialogue offers a **Trace/Watch/Debug** option. Briefly, you place a **Watch Level** on variables and formulas to report when they are set or changed. The report is generated during an Engine run. The results of this report are contained in the **Debug File** that is specified at Engine run time.

Trace Overview

The **Trace** facility, as the name suggests, allows you to record the Engine processing during a test run. It is useful in tracking timing issues. This option can be important when a better understanding of the order of events is needed. The generated trace file can be viewed using any standard text editor, or printed.

Trace Specifications on the Run the Engine Dialog Box

IMPORTANT NOTE: **All** and **Trace Data** can generate enormous amounts of output. They should be used with limited customer sets.

Procedure

1. **Choose** one of the levels from the **Trace Level** list box:

- ◆ **All** provides a complete trace.
- ◆ **Trace Logic** provides a complete trace and includes the **Data** option. It does not show variable changes. (Except those on watched variables if a watch has been specified.)

If you do not select **All**, check the individual objects you would like to trace.

If you can isolate the problem to certain objects, it will be much easier to read the report. Check only the necessary objects.

Watch Overview

When a change occurs in a watched object, a notification is placed in the **Debug File** to indicate the change. **Flag** individual objects (variables, rules, or tables) as potential candidates for watching. You do this by setting the **Watch Level** in the object properties to write to the file. The options for **Watch Level** are:

- ◆ **None**,
- ◆ **Set**
- ◆ **Changed**, which provides the greatest level of detail, since it writes each time the value changes, not just when the value is set.

Watch Level Specifications on the Run the Engine Dialog Box

Three **Watch Levels** are available to screen the objects.

1. **Choose** one of the levels from the **Watch Level** list box.
 - ◆ **Variable** – most detail – all variables are watched.
 - ◆ **Rule** – medium detail – variables are watched only in rules.
 - ◆ **Table** – presumably the least detail – variables are watched only when used in tables. Of course, if most of your variables are used in tables, this is not necessarily the least detail. If you are troubleshooting tables, you should use this setting.

The Engine marks the objects of the chosen type that you **flagged** to be watched. The objects are monitored during processing. If you do not **flag** any objects in the application, no report will be generated.

The **Debug File** will be generated during the Engine run and placed in your C:\Program Files\Exstream directory if running on Windows in the default location.

TECHNICAL NOTE: This facility cannot be used in production. The information will not be compiled. You can use it in *test mode only* to debug your application.

IMPORTANT NOTE: To learn about **Trace/Watch/Debug**, see the book, [Reference Guide to Variables, Data Files, and Data Mapping](#).

Additional Features

Dialogue has numerous additional features for you to explore. You can learn more about them in other books in the [Reference Guides](#) series.

Chapter 12: Test Questions and Answers

Test One – General Terminology

1. Q. What is a Campaign?
A. A “container” for one or more marketing messages to be sent to the same group, usually during a specific period.
2. Q. What is meant by Context-Sensitive?
A. Context-sensitive is behavior that is dependent on what the user is doing at the time.
3. Q. What is Data Mapping?
A. Data mapping is to define areas of a data file as a data area by means of a variable.
4. Q. What is a Duplex page?
A. A Duplex page is a page that is printed on the front and back.
5. Q. What is meant by Edit?
A. Edit means to change, format, or further define an object.
6. Q. What is an Engine?
A. The engine is a part of a computer program that implements a certain technique or routine.
7. Q. What is the Environment?
A. The display and graphic interface provided by software. The operating environment provides rules that are common to the software that it supports.
8. Q. What is a Menu Bar?
A. A horizontal list of menus that appears across the top of your program window.
9. Q. What is a Shortcut Menu?
A. A shortcut menu is a menu the user can access by right-clicking an item for which a context-sensitive menu is available.
10. Q. What is a Software Suite?
A. A suite is a set of related programs from one software provider. These applications are integrated to work together, spanning the scope of a task.
11. Q. What is a Template?
A. A template is an object that contains basic specifications or restrictions from which other objects are created.
12. Q. What is a Thumbnail?
A. A small image of a graphic object that helps you identify it.

- 13. Q. What is a Title Bar?
 - A. The top area of a window in most Windows software programs.
- 14. Q. What is a Toolbar?
 - A. Group of icons or text, offering frequently used tools or commands.
- 15. Q. What is Whitespace?
 - A. Whitespace is empty space on a page.

Test Two - Terminology in Dialogue

1. Q. In Dialogue, what is Access Limitation?
A. In Dialogue, there can be a limitation of access to each set of functions, according to the user group.
2. Q. In Dialogue, what is an Application?
A. A unique mailing. An application defines a particular Dialogue Engine run.
3. Q. What is Application Design Access?
A. In Dialogue, this determines access to applications and documents. This is a feature of Functional Access.
4. Q. What is Approver Departmental Access?
A. In Dialogue System Settings, if this check box is selected, you can approve objects to which you have access. This is a feature of Departmental Access.
5. Q. What does Archive mean in Dialogue?
A. It is a stage of the version process in Dialogue Content Manager. An Archive object exists only in History.
6. Q. What does Auto Restore mean in Dialogue?
A. Objects last edited in the Property Panel or Edit Panel are automatically displayed in the panels the next time you start Dialogue Manager.
7. Q. What is Campaign Design Access?
A. In Dialogue, this determines access to campaigns and messages. This is a feature of Functional Access.
8. Q. What is meant by Cloning?
A. In Dialogue, cloning means to make a copy of an object with a new name.
9. Q. What is the Code button?
A. In Dialogue, the Code button allows you to access the Code Panel, which allows you to write Visual Basic style code arguments for complex control of the selection of objects.
10. Q. What is Create Access?
A. In Dialogue this limited access type allows you to view, edit and create new objects.
11. Q. What is Create and Delete Access?
A. In Dialogue this limited access type allows you to view, edit, create and delete objects.
12. Q. What is the Dialogue Customer Knowledgebase?
A. In Dialogue, valuable tracking information is stored in the centralized Customer Knowledgebase. It is used to ensure future interactions with customers based on current information.
13. Q. What is Data Administration?
A. In Dialogue, the data administrator works with customer data, data files, data file mapping, and variables.

14. Q. What is Data Administration Access?
A. In Dialogue, this determines access to the data dictionary and data files. This is a feature of Functional Access.
15. A. What is Database Management?
Q. The task of storing information in a database and then retrieving the information. Dialogue Content Manager is the premium database management program for customer information.
16. Q. What is Departmental Access?
A. In Dialogue, you can be granted access to functions according to your department.
17. Q. What is a Drawing Object?
A. In Dialogue, a drawing object is an object you create in a design in the Dialogue Designer program. Some drawing objects are: lines, shapes, text boxes, tables, and charts.
18. Q. What is Edit Creative Departmental Access?
A. In Dialogue System Settings, if this check box is selected, you can modify the graphics and text associated with messages and pages. This is a feature of Departmental Access.
19. Q. What is the Edit Panel?
A. The lower-right panel of the Dialogue Content Manager interface.
20. Q. What is Edit Rules Departmental Access?
A. In Dialogue System Settings, if this check box is selected, you can edit targeting and inclusion rules. This is a feature of Departmental Access.
21. Q. What is Environmental Administration Access?
A. This type of access determines access to the Environment features, including fonts, locales, languages, users and user groups, the print/mail settings, and message setup. This is a feature of Functional Access.
22. Q. What is a Folder?
A. In Dialogue, a Folder is a heading in the Library.
23. Q. What is Folder Administration?
A. In Dialogue System Settings, if this check box is selected, you can create, delete, and control access to folders. This is a feature of Departmental Access.
24. Q. What is a Folder Area?
A. In Dialogue, a Folder Area is the area below a Folder (Heading). Objects reside in this area.
25. Q. What is a Frame?
A. In Dialogue, a frame reserves an area on a page for specific message types, and further defines what can be placed in that area.
26. Q. What is Functional Access?
A. In Dialogue, user groups are defined by the function they perform.
27. Q. What is a Heading?
A. In Dialogue, folders that contain objects are called headings. For example, messages

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reside under the Messages Heading.

28. Q. What is a High-Order Object?
A. In Dialogue, an object that contains other objects, such as an application, document, or campaign.
29. Q. What is meant by In-Process?
A. The designing stage of the version process in Dialogue Content Manager.
30. Q. In Dialogue, what is the Library?
A. In Dialogue, the left panel of the Dialogue Content Manager interface where the objects you create are stored.
31. Q. What is Limited Access?
A. In Dialogue, users can be limited by user group as to what they are allowed to do in the system.
32. Q. In Dialogue, what is meant by Marketing?
A. In Dialogue, commercial messages and communications, often date sensitive or cost-controlled.
33. Q. In Dialogue, what is a Message?
A. In Dialogue, a communication.
34. Q. In Dialogue, what is an Object?
A. In Dialogue, an object is an item you create.
35. Q. In Dialogue, what is a Page?
A. In Dialogue, an area that can be viewed at one time.
36. Q. What is the Property Panel?
A. The upper-right panel of the Dialogue Content Manager interface.
37. Q. What is Revise Access?
A. In Dialogue, this type of limited access allows you to view and edit the objects and properties.
38. Q. In Dialogue, what is a Rule?
A. In Dialogue, a rule controls the selection behavior of an object by using conditional statements and variables.
39. Q. In Dialogue, what is meant by Security?
A. In Dialogue, security is controlled under the Environment Heading. You can set up users and assign those users to user groups. You then define the access that each group has to particular functions (functional access), which thereafter control whether these users can control Environmental (Universal) Settings, Campaign Design, Application Design, and Data Administration.
40. Q. In Dialogue, what is meant by Submit?
A. It is a stage of the version process in Dialogue Content Manager.

41. Q. In Dialogue, what is meant by System?
A. The system refers to all of the hardware and software (including all files), attached to your computer, specifically the components used by Dialogue.
42. Q. What is System Settings?
A. System Settings is an object under Environment Heading in the Library in Dialogue Content Manager. It controls global settings for Dialogue.
43. Q. What is Targeting?
A. Targeting is the act of selecting a customer or selecting an object for a customer. It also includes customizing an object for a customer.
44. Q. What is a Thumbnail Box?
A. The box in the lower-left area of the Property Panel, that shows you a miniature representation of an object.
45. Q. What is Tracking?
A. In Dialogue, the term tracking has two specific uses. In data administration, tracking refers to the ability to track the distribution and response of campaigns, and target future campaigns on these results. Additionally, in Dialogue Designer, fonts can be formatted by font tracking to control the spacing between individual characters.
46. Q. What is meant by Unsubmit?
A. Withdrawing a submission. A stage of the version process in Dialogue Content Manager.
47. Q. What is User Access?
A. It controls access to the system to determine what functions a user is allowed to perform.
48. Q. What is a Variable?
A. In Dialogue, a variable is an object that can be found in the Library. It is a representation of a value or string that can change at Engine run time, according to the data processed.
49. Q. What are Versions?
A. In Dialogue, you can have more than one version of an object, such as a message. Objects can be In-Process, Submitted, Approved, or Archive. There can be more than one archived version. Versions give control over the approval process.
50. Q. What is meant by View Access?
A. This type of limited access allows you only to view the objects and properties.

Test Three – Exstream Software and the Dialogue Software Suite

1. Q. What is Exstream Software?
A. Exstream Software is a company that helps businesses around the world connect with the eGeneration through personalized business communications delivered by mail, email, and web browsers.
2. Q. What is the mission of Exstream Software?
A. Exstream Software helps businesses around the world connect with the eGeneration through personalized business communications delivered by mail, email, and the Internet.
3. Q. What is Exstream Software's best-known quality for customer service?
A. Exstream Software is known for being responsive to the needs of our customers.
4. Q. Where is Exstream Software's Corporate Headquarters?
A. In Lexington, Kentucky, USA.
5. Q. Who is an Exstream Sales Representative?
A. Usually the person who sold your organization the software. You should attempt to contact them first. Sometimes your representative may change due to the reorganization of sales regions. If you have difficulty contacting your representative, please contact Exstream Corporate Headquarters.
6. Q. Where is the Exstream Website?
A. Visit <http://www.exstream.com/> for the latest developments and product release information.
7. Q. What is Dialogue?
A. Dialogue is the only software solution available today that combines electronic document presentment, campaign management, and content management in one easy-to-use tool.
8. Q. What does Dialogue do?
A. Dialogue is an integrated software package produced by Exstream Software. It is a solution for business communication that spans the needs of organizations that require on-demand, real time output to print or electronic media.
9. Q. What is Dialogue Content Manager?
A. Dialogue Content Manager, also referred to as Manager, manages the entire Design Database, which contains all of the information and objects needed to build sophisticated applications for output to virtually any media. It has the capability to manage applications (mailings), campaigns (time-sensitive, customized marketing messages), variables (for selection and personalization), templates (for whitespace and placement control), security (by department or user), output device, and queue (print stream management).
10. Q. What is Dialogue Designer?
A. Dialogue is a feature-rich graphic design program that allows you to create contemporary designs using drawing objects and photographic images to enhance your business communications. It functions seamlessly with Dialogue Content Manager to create designs that work across all media for print output or output to the Internet.

11. Q. What is the Dialogue Engine?
A. The Dialogue Engine is a program used to combine information in the package file that is a compilation of the application and format it in a control language for each output queue. The result is that each output device can interpret the information and output it to a paper or electronic media format.
12. Q. Can you use Dialogue to build documents without campaign management?
A. Yes, but with the addition of the Campaign Manager Module, it can control distribute of the campaign materials by date, postage and priority.
13. Q. What organizations would use the Enterprise Support features in Dialogue?
A. This group of features in Dialogue Content Manager is tailored for large organizations.
14. Q. Can Dialogue produce long documents like policy plan booklets, catalogs, and magazines, and combine them in an application with other communications?
A. Yes, and with the addition of the Publication Support Module, the numbering can run consecutively throughout all documents.
15. Q. Can Dialogue produce complex managed documents like statements, newsletters, and plan booklets?
A. Yes, and with the addition of the Publication Support Module, it can number multiple documents consecutively and add tables of contents, indexes, and footnotes.
16. Q. Can Dialogue produce documents for high-volume print/mail environments?
A. Yes.
17. Q. Can Dialogue produce documents for multiple print/mail environments in one operation?
A. Yes, by specifying the elements for each print queue.
18. Q. How does Dialogue personalize messages?
A. Dialogue can personalize or customize the items included in messages by accessing information from your database.
19. Q. What kinds of messages can be created in Dialogue?
A. Examples of messages include bills, statements, ads, catalog items, coupons, news articles, advisories, prospectuses, notices, letters, notes, preprinted inserts, long documents, and Internet communications.
20. Q. Why is Many-to-Many Campaign Management important?
A. Dialogue includes a many-to-many campaign management process. This means that Dialogue manages the delivery of many different campaigns to many different customers. This requires specialized selection and prioritization of the campaigns.
21. Q. What is the Basic Content Management, Design, and Document Production Module?
A. The Basic Document Composition Module includes the Document Composition Engine. It allows organizations to automate the creation of internal or external customer correspondence through the design of messages, documents, and other communications.
22. Q. What is Enterprise Support?
A. Enterprise Support is an enhancement for the Basic Document Composition Module that manages workflow, version control, security, and international multiple language support.

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23. Q. What is the Advanced Table Processing Module?
A. The Advanced Table Processing Module provides tables that can flow from one area to another on a page or to another page in a document.
24. Q. What is the Dynamic Charts Module?
A. The Dynamic Charts Module provides the ability to design and print various types of dynamic charts, including 3-D pie charts that are data driven.
25. Q. What is the Publication Support Module?
A. The Publication Support Module provides all the features you need for long documents, including Indexes, Tables of Contents, Footnotes, Cross-References, and automatic renumbering of sections and chapters.
26. Q. What is Dynamic File Importing?
A. The Dynamic File Importing Module provides you with the ability to dynamically substitute entire text files, image files, messages, and use an Electronic Warehouse as a repository for files.
27. Q. What is the Campaign Manager Module?
A. The Campaign Management Module has the ability to create and target marketing information consisting of dynamic messages or preprinted material and the frequency with which it is sent to a customer.
28. Q. What is the Advanced Campaign Manager and Tracking Module?
A. The Customer Knowledgebase Module provides the ability to track all contact, across all applications and to build upon them for future communications.
29. Q. What is the High-Volume Print/Mail Management Module?
A. The High Volume Print/Mail Management Module provides an automated document factory with the ability to manage printers and post-processing equipment.
30. Q. What is the Production From Designer Option?
A. The Production from Designer Option allows you run production on a single PC.
31. Q. What is the Print Miner Module?
A. The Print Miner allows you to combine information from existing print streams files with new information, personalization, and complex formatting. It can also be used to charge clients for output by a service bureau.
32. Q. What is the XML Input Module?
A. The XML Input Module allows you to use data directly from the Internet as a data file in Dialogue.
33. Q. What are multiple PDLs?
A. System support for multiple PDLs is available.
34. Q. What is the eFulfillment Module?
A. The eFulfillment Module lets you respond almost instantaneously to your customers by means of a web page or kiosk interface, by using the Dialogue Engine to compose finished electronic documents.

35. Q. What is Usage Metering?

A. Usage Metering allows you to be charged for the use of Dialogue on a per-use basis.

Test Four – How Well do You Understand the Content Manager Interface?

1. Q. Name the three interface panels.
A. The three interface panels are the *Library*, the *Property Panel*, and the *Edit Panel*.
2. Q. What does a red line across the top of a *Property Panel* mean?
A. It means that the current object is read-only. It is locked and cannot be changed.
3. Q. What is a home folder?
A. A *home folder* is the basic folder for your workgroup. It contains all objects that are unique to your workgroup, depending on the way the system is set up and the size of your organization.
4. Q. How do you find the *home folder*?
A. It is easily accessed from the *folder navigation button* on the toolbar that launches the folder navigation dialog box. You press a button with a house icon on it to get to the home folder.
5. Q. How do you move the *toolbar*?
A. To move the *toolbar*, click anywhere around the buttons and drag the toolbar to the new location. If you drag the toolbar to one of the sides of the window, the toolbar is docked along that edge. If you drag the toolbar onto the window, the toolbar becomes a floating toolbar.
6. Q. What is a *reference*?
A. A *reference* is a pointer to an object. It represents a virtual copy that is included in an object of a higher order. For example, a message is referenced in a campaign in which the message is used. The actual message may reside under the messages heading.
7. Q. What is a *reference list*?
A. The list of objects in an application, document, or a campaign is a *reference list*. It is a list that shows what items are included in an object of a higher order. For example, an application contains a reference list of data files, output queues, documents, pages, messages, and possibly campaigns.
8. Q. Dialogue lets you set the units of measure you want to use. True or false.
A. True.
9. Q. Shortcut menus provide quick access to frequently used functions. How do you access a shortcut menu from the Edit Panel?
A. You can access shortcut menus from the Edit Panel by right-clicking an object.
10. Q. What happens when you drag a heading from the Library to the Edit Panel?
A. Depending on the type of heading, you see a list with extended information about the properties, type, template, version, and so on, of the objects in the list.
11. Q. What happens when you double-click a thumbnail?
A. Designer is launched.
12. Q. If you are viewing the properties of a message and you edit it in Designer, when will the thumbnail change?

A. When you save and exit the message in Dialogue Designer, and exit the message in Dialogue Manager. The next time you open the message, the changes will show in the thumbnail. Expand and collapse the Library heading to update the list in the Library.

13. Q. What is the function of the system administrator?

A. The system administrator is the person in charge of the highest level of computer functions in your organization. They set up the system, control the system, and may be in charge of running the Engine in production mode to compose the application. Their job responsibilities will vary from organization to organization.

14. Q. What determines user access?

A. The user ID you use to log on to Dialogue Manager determines your system access. The system administrator sets it and you cannot override the limitations they have set.

15. Q. Can the system administrator limit the functions to which you have access?

A. Yes. The system administrator can limit functional access.

16. Q. What are the four types of functional access?

A. The four types are:

1. Environmental Administration—Determines access to the Environment features.
2. Data Administration—Determines access to the data dictionary and data files.
3. Application Design—Determines access to applications and documents.
4. Campaign Design—Determines access to campaigns and messages.

17. Q. What are message styles in Dialogue?

A. Dialogue can manage three basic styles of messages:

1. Text Only: those which do not contain any graphics.
2. Graphic: those that contain text, images, graphics, charts, and other objects.
3. Preprinted inserts: preprinted pages or documents that are added to the customers' mailing using a high-volume inserter, (only if the Print/Mail Environment is enabled).

A fourth Type of Message is available within the interface called Graphic or Insert. If the preprinted insert is not available or not set up on the high-volume inserter, a replicated insert can be printed and inserted in its place.

18. Q. What are the names of the two programs that users can use to produce messages?

A. The names of the two programs are: Dialogue Content Manager and Dialogue Designer.

19. Q. What controls the position of messages from the pool of messages on pages?

A. Frames that specify the message type control the position of *selected messages* on pages.

20. Q. How do you save and exit an object in the Edit Panel?

A. To save the changes you made to the object, make sure the Edit Panel is the active panel by clicking anywhere on the Edit Panel. Then click the Save and Exit button on the toolbar.

Test Five – What do You Know about Versions, Approval, and History?

1. Q. What is meant by the *version* of an object?
A. The *version* is the stage of completion of an object.
2. Q. How does Exstream Dialogue symbolize *versions* of objects in the *Library*?
A. An orange cone indicates that the object is in process. A green arrow indicates that the object has been submitted for approval. A blue check mark indicates that the object has been approved. A gray lock indicates that the object has been archived.
3. Q. What is *version control*?
A. Dialogue Manager automatically tracks *versions of objects*, and only certain individuals are allowed to approve them. It is possible in the Engine settings to only approved versions of objects.
4. Q. Do all companies use *version control*?
A. *Version control* is a feature of the Enterprise Support Options. Version control is used by only those companies that want a tight protocol control over the approval process before messages are sent to customers.
5. Q. What is a version?
A. A version is the term used to define the status of an object available in the Library. Versions can be In-Process, Submitted, Approved, or Archived.
6. Q. What does Approve mean in Dialogue?
A. It is a stage of the version control process in Dialogue Content Manager.
7. Q. Who is allowed to approve an object?
A. The ability to approve an object is determined by the settings chosen by the *system administrator*. Usually there is one person designated as an approver for each department.
8. Q. You can set your options so that the software displays only one version. True or false.
A. True.
9. Q. What is History?
A. History shows all the versions of an object that have ever been created, including the different versions, except for those that have been purposely deleted from History.
10. Q. Can you control the number of archived versions to keep in History?
A. The number of versions to keep in History can be limited by the system administrator to avoid using excessive memory.

Test Six – What do You Know about Multiple Languages?

1. Q. Everyone can design objects in *multiple languages*: True or False.
A. False. Your *system administrator* must enable multiple languages for your system before you can design objects in multiple languages.
2. Q. Why would you want to design objects in *multiple languages*?
A. You may want to design objects in *multiple languages* if your distribution is worldwide, or includes areas that encompass more than one language
3. Q. What types of Dialogue *objects* can have *language layers*?
A. *Messages* and *pages* can have language layers.
4. Q. Describe two ways to use the language-independent (default) layer.
A. The two ways are:
 1. It can be sent stand-alone to customers whose local language does not exist for a message or page. It may include text in the most widely spoken language of the audience, or the native language of the product or service.
 2. It can be used as a background for all *language-specific layers*.
5. Q. You can use the default language layer as a background for all other language layers: True or False.
A. True.
6. Q. How do you edit a *language layer* in Designer?
A. Open the page or message and click the *Language Button* on the toolbar.
7. Q. *Language layers* can be different sizes: True or False?
A. True.
8. Q. Why would *language layers* be different sizes?
A. Two reasons:
 1. Because some languages take more words and characters to complete an idea than others do. Therefore, the space allowed for one *message* or slogan may not be sufficient for another language.
 2. Due to the growth of items in the *message*.
9. Q. List the order in which graphics and text are placed on *layers*.
A. Graphics and text reside on *layers* in this order:
 1. The *template layer*
 2. The *default language layer*
 3. The *specific language layer*
10. Q. Why is it better to create a message in *multiple language layers* rather than create multiple copies of a message?
A. It eliminates redundancy, automatically targets, and controls the distribution of the message as a whole.

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11. Q. What is an easy way to find multiple-language translations for text?
A. Language translators are available free on the Internet. Be sure the source is reliable.
12. Q. If, according to the options you have chosen, the *default language layer* is not distributed to users when the user's specific language does not exist, what is distributed?
A. Nothing.

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