INTERWOVEN

TeamSite® User's Guide

Release 5.5.2

for Solaris™

INTERWOVEN

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Chapter 1

Introduction

About This Manual

The *TeamSite User's Guide* introduces you to the day-to-day operations of TeamSite. It contains detailed instructions for all the functions that can be performed at the Author, Editor, and Administrator levels, and is primarily intended for Editors and Administrators. Authors should refer to the *Author's Guide*. Masters and Administrators should also refer to the *TeamSite Administration Guide*, the *TeamSite Command-Line Tool Reference*, and the *TeamSite Workflow Developer's Guide*.

This manual refers to the version of TeamSite that runs on the Solarisserver platform. The client platform—your own computer—may be any one of Windows 98, NT, or 2000; Macintosh; or several types of UNIX. For more information on supported client platforms, see the "Getting Started" chapter of this manual.

This manual assumes that you have a basic understanding of your computer and that you are familiar with basic commands such as opening and closing files. It also assumes that you are familiar with the World Wide Web or your company's intranet, that you have some experience using a web browser, and that you have some knowledge of editing Web site files.

The *TeamSite User's Guide* is also available online, through the **Help** button in the TeamSite graphical user interface.

Notation Conventions

This manual uses the following notation conventions:

Boldface text represents the exact text that appears in a GUI element (for example, a menu item, button, or element of a dialog box). For example:

> Click the **Edit File** button in the Button Bar.

`Monospaced` text represents command-line output, or file names. For example:

> The `iwextattr` command-line tool allows you to set and look up extended attributes on a file.

`Monospaced italic` text represents a command-line variable. For example:

> `iwckrole` *`role user`*

means that you must insert the values of *`role`* and *`user`* yourself.

`Monospaced bold` text represents user input. The `%` character that appears before a line of user input represents the command prompt, and should not be typed. Your system may not use this command prompt. For example:

`http://`*`TeamSite_hostname`*`/iw`

means that you must enter the above text as represented, inserting the your TeamSite hostname in place of the italicized text.

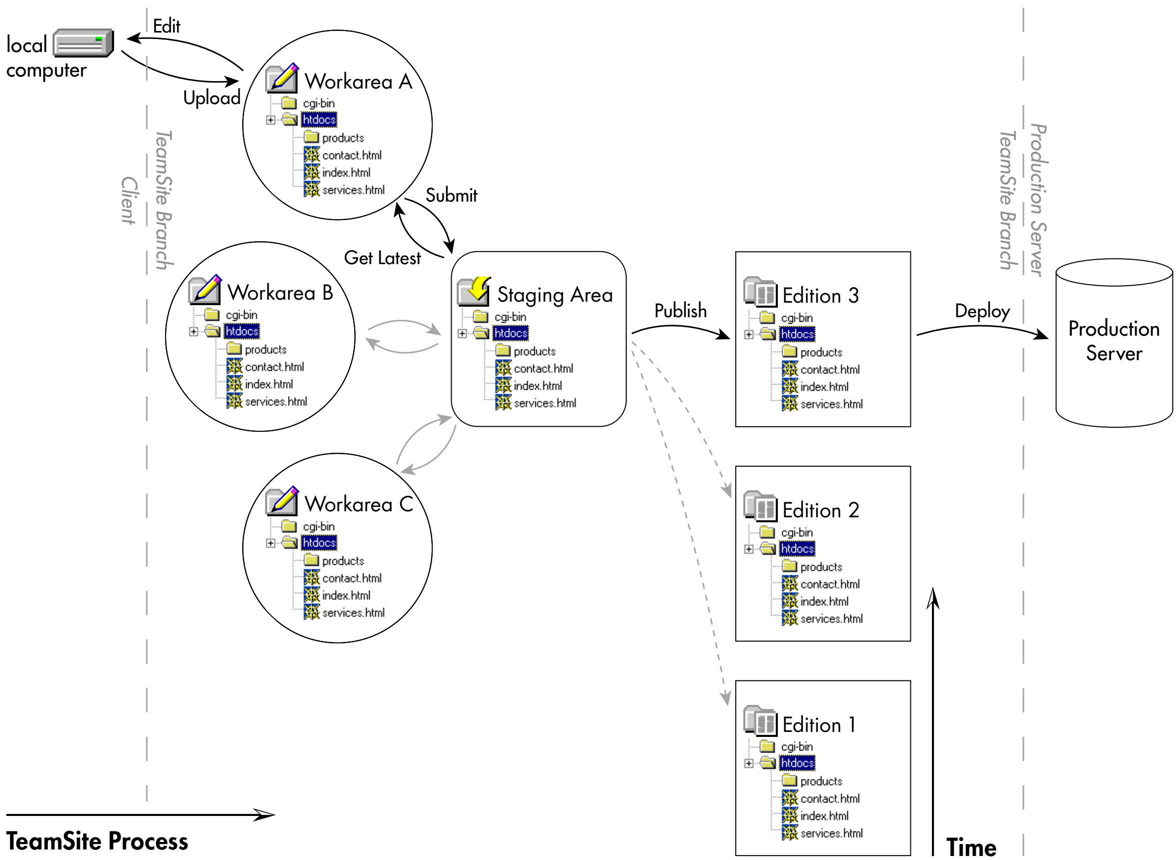
Square brackets [ ] surrounding a command-line argument mean that the argument is optional.

A | character separating command-line arguments means that only one of the arguments should be used.

Overview

TeamSite Structure

TeamSite allows you to structure your web development into different *branches*. Each branch contains private *workareas*, which contain complete virtual copies of the Web site; a *staging area*, where contributors integrate their work; and *editions*, which are read-only snapshots of the Web site at various points in its development. Each area contains a virtual copy of the entire Web site. Content is submitted from workareas to the staging area, and the staging area is then published as an edition. Editions may then be deployed to your production server.



Optionally, your TeamSite administrator can create the aforementioned branch structure on separate *backing stores*. Backing stores, and all the TeamSite structural elements, are described in the sections that follow.

Backing Stores

A backing store is a large directory created by the TeamSite installation program that contains TeamSite files and metadata.

Previous releases of TeamSite have been limited to one backing store per TeamSite server. Now your TeamSite administrator can create as many as eight backing stores per TeamSite server. The functionality that enables multiple backing stores is known as *MultiStore.*

Each backing contains its own set of branches, workareas, and editions. Multiple stores associated with a TeamSite server share the same set of TeamSite configuration files (for example, users and roles).

TeamSite users using the file system interface or WebDesk Pro are able to see all the active backing stores to which they have permission to access.

Separate backing stores are typically created for branches that meet the following criteria:

- Distinct deployment targets
- Legacy or infrequently accessed data
- Distinct ownership within your organization
- Content that will not be shared

Backing stores are depicted in TeamSite with the icon.

Branches

TeamSite allows you to structure your Web site into various *branches* of development. Branches may be related to each other (for example, alternate language versions of the same Web site) or they may be completely independent (such as internet and intranet Web sites). Each branch contains all the content for a Web site.

A single branch contains archived copies of the Web site as editions, a staging area for content integration, and individual workareas where users may develop content without disturbing one another. Branches can also contain sub-branches, so that teams may keep alternate paths of development separate from each other. Content can be easily shared and synchronized across branches and sub-branches. Users may work on one branch or on several, and the number of branches on a system is not limited.

Branches allow separate teams to work independently on different jobs. Because all branches are located on the same TeamSite server, it is easy for one team to incorporate the work of another into their job.

Branches are depicted in TeamSite with the icon.

Sub-branches

A *sub-branch* is a branch subordinate to a major branch. Each sub-branch receives its own unique staging area and workareas and generates its own editions, and it may contain sub-branches of its own. Editions published on a sub-branch can be integrated back into work on the higher branch, or released as stand-alone Web sites.

Workareas

A *workarea* is a virtual copy of the entire Web site. Contributors can create content within workareas and see their changes within the context of the Web site without affecting the actual site or the work of contributors in other workareas. Users who have access to a workarea can modify files within that workarea and view their changes within the context of the entire Web site before integrating their work with that of other contributors (this process is known as SmartContext™ QA). Users can lock files in each workarea, eliminating the possibility of conflicting edits.

All changes that are made to files in a workarea are kept completely separate from other workareas and the staging area until the user chooses to promote his changes to the staging area. Within a workarea, users can add, edit, or delete files, or revert to older versions of files without affecting users in other workareas.

Workareas are depicted in TeamSite with the  icon.

Staging Areas

A *staging area* is where the work of different contributors is coordinated. Contributors can submit the contents of their workareas to the staging area to confirm that their work is well integrated with that of other contributors.

Staging areas are depicted in TeamSite with the  icon.

Editions

An *edition* is an archived, read-only version of the Web site that can be deployed to the web server. Editions are "snapshots" of the staging area at a particular point in time. Older editions are kept in the branch along with the current version. Contributors can create new editions any time they feel their work is well integrated, or any time they want to create an update to the Web site for reference or deployment. Each edition is a fully functional version of the Web site, so that users can see the development of the Web site over time and compare it with current work.

Editions are depicted in TeamSite with the  icon.

TeamSite Users

TeamSite has four classes of users: Authors, Editors, Administrators, and Master users. Each of these types has different abilities and levels of influence within the structure of TeamSite.

Authors

Authors are primary content creators. All work done by Authors goes through an explicit approval step. They can receive assignments from Editors which are displayed in Task lists when Authors log in to TeamSite. Authors can access TeamSite from a simple browser-based interface and do not need to be sophisticated computer users.

In order to test and check their work, Authors have full access to the content in their Editors' workareas, but do not need to concern themselves with the larger structure and functionality of TeamSite. The Author role is appropriate for non-technical users, or for more technical contributors who do not need access to TeamSite's extended functionality, such as TeamSite's advanced version management features.

Editors

Editors own workareas. They create and edit content, as Authors do, but they are primarily responsible for managing the development taking place within their workareas. This includes advanced version management, participation in workflow processes and submitting completed content to the staging area, and it may include publishing editions.

Editors have access to specialized TeamSite content and workflow management functions. Editors are generally "managerial" users, who primarily supervise the work of Authors, or self-managing "power" users, who need TeamSite's extended functionality to manage their own content.

Administrators

Administrators own branches. They have all the abilities of Editors, but they are primarily responsible for the content and functioning of their branch. Administrators can manage project workflow by creating new workareas for Editors and groups, and by creating sub-branches of their own branch to explore separate paths of development.

An Administrator is the supervisor of the project being developed on his branch. He may be the web master for a particular version of the Web site, or a project manager.

Masters

Master users own the Web site. They can perform all the functions of Editors and Administrators on any branch. The Master user owns the main branch, from which all sub-branches are created. The Master user is generally involved in the installation of TeamSite, and can reconfigure TeamSite on a system-wide basis.

TeamSite Workflow

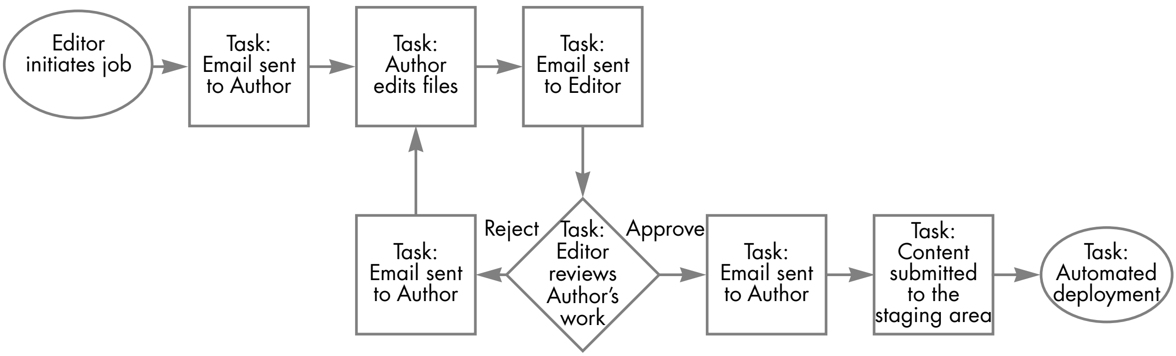
This section discusses the basic concepts of TeamSite Workflow:

Workflow Models

A *workflow model* is a general workflow configuration that can be used repeatedly. Each workflow model describes a process which may include user tasks and a wide variety of automated tasks. Workflow models are configured by the system administrator or by the Interwoven Client Services Organization.

For more information about configuring different workflow models, consult the *TeamSite Administration Guide*.

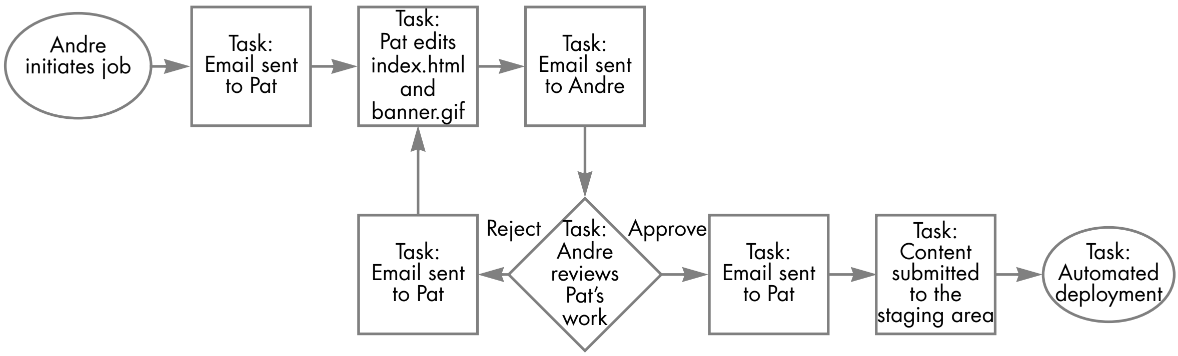
Below is a diagram of a very simple assign-edit-approve workflow model. Email is sent to the participants at every stage of the process, and some automated tasks are performed at the end.



Jobs

A *job* is a set of interdependent tasks. One example of a TeamSite job would be the set of tasks needed to prepare a new section in a marketing Web site to support a new product launch.

Each job is a specific instance of a workflow model. When a job is created, the job creator must supply all the specific information for that job. For example, the workflow model above might be used to create the job below.



Because jobs follow predefined workflow models, tasks cannot be added to or removed from individual jobs.

Tasks

A *task* is a unit of work performed by a single user or process. Each task in a job is associated with a particular TeamSite workarea and carries a set of files with it. The user or process owning a task can modify, add files to, or remove files from the task.

Tasks have two possible states: active and inactive. A task becomes active when its predecessor tasks signal it to do so (predecessor tasks and conditions for activation are all configured as part of the workflow model). Once the task has been activated, users or external programs can work on it. For example, once a user task has been activated, the user can work on the files contained in the task. Once an external task has been activated, the appropriate external program can run on the files contained in the task. Inactive tasks are tasks that have been completed, or that have not been activated yet.

Chapter 2

Getting Started

This chapter explains about:

- Setting up the TeamSite graphical user interface:

  - Choosing a Browser (page 16)
  - Logging In to TeamSite (page 16)
  - About LaunchPad (page 17)
  - Invoking LaunchPad (page 17)
  - Configuring LaunchPad (page 18)
  - Logging Out of TeamSite (page 25)

- TeamSite GUI views:

  - Using the TeamSite Workflow View (page 26)
  - Navigating Through the TeamSite Branch View (page 26)

- TeamSite GUI elements:

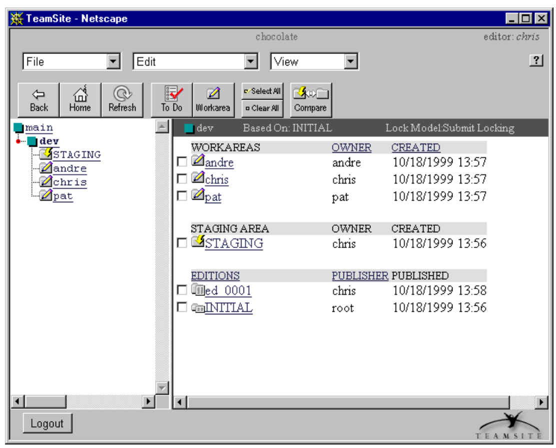
  - The Tool Bar (page 28)
  - The SmartContext Editing Tab (page 28)
  - The Casual Contributor Interface (page 30)

- The file system interface:

  - Accessing the TeamSite File System Interface (page 31)
  - Navigating Through TeamSite (page 31)

Setting Up the TeamSite Graphical User Interface

The TeamSite graphical user interface (GUI) gives you full access to TeamSite through a simple browser-based interface. The GUI is used to perform all functions specific to TeamSite, as well as some general file management functions such as creating new files and directories. The GUI is also used to edit files and perform in-context QA. TeamSite supports the input of multiple languages through the GUI. For details, see Appendix B, “Internationalization.”



TeamSite branch structure, as seen through the GUI

Choosing a Browser

The TeamSite GUI runs through a browser such as Netscape Communicator or Microsoft Internet Explorer. The TeamSite thin-client interface does not require you to install any other client software unless you will be editing files through the TeamSite GUI. If you will be editing files, you will need to install a small utility called LaunchPad (see page 17).

The following table shows compatibility for most popular browsers on all supported client platforms:

	Netscape	**Internet Explorer ***
Windows 98, Windows NT, Windows 2000	4.7x	5.0-5.5, 6.0
UNIX	4.7x	Not supported
MacOS	Not supported	5.1

* Some versions of Internet Explorer do not include the Java Virtual Machine. If you do not have the Java Virtual Machine, you can download it from Microsoft's Web site at www.microsoft.com.

Setting Browser Encoding

If you are using Netscape and you need to use international characters in file names, you will need to manually specify the encoding for TeamSite. If you are using Internet Explorer or if you do not need to use international characters, you do not need to do this step.

To specify the encoding to use:

1. In Netscape, select **Edit > Preferences**.
2. Click the **Fonts** option in the left pane.
3. In the **For the Encoding** menu choose **Unicode**.
4. Set the variable width and fixed width fonts to fonts that support the language you want to view TeamSite in.
5. Choose **Use my default fonts, overriding document-specific fonts**.
6. Click **OK**.

Before you log in:

1. Select **View > Character Set > UTF-8**.
2. Select **View > Character Set > Set Default Character Set**.
3. Select **View > Character Set > UTF-8** again.

Logging In to TeamSite

1. Access TeamSite through your browser:
   `http://`*`TeamSite_hostname`*`/iw/`
2. The TeamSite login screen will appear.
3. Select your user type (Author, Editor, Administrator, or Master) using the pull-down menu.

4. Enter your username and password.
5. Click **Login**.

TeamSite login screen

6. The TeamSite window will appear. The view that appears is called your Home page and can be returned to at any time by clicking the **Home** button in the Button Bar. You can set the **Home** button to go to any location in TeamSite where you have access (see page 27).

   If you have not set your Home page, TeamSite will show you a list of the jobs that you own. If you are an Author, TeamSite will show you a list of the tasks that you own.

In future logins, TeamSite will "remember" your latest settings (role and username) through a cookie it sets on your computer.

About LaunchPad

If you are going to edit files or view them in an editing application, you need to use LaunchPad. LaunchPad is an applet which runs in your browser (see page 17).

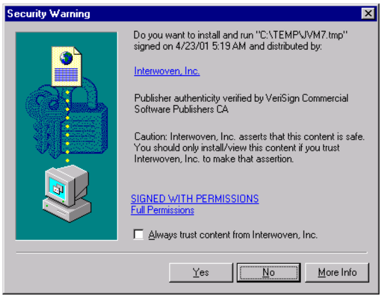
LaunchPad allows you to make associations between file types and the editing applications you want to use. For example, your computer may automatically be configured to always open HTML files in a browser. You can configure LaunchPad so that when you open an HTML file through the TeamSite GUI, it will open in your editing application instead.

Invoking LaunchPad

LaunchPad will be invoked automatically the first time you do something in TeamSite that requires LaunchPad, such as editing or importing files. The LaunchPad applet is available for:

- Windows
- Macintosh
- UNIX

The first time you edit a file through TeamSite, your browser will display a dialog asking whether or not you want to give permission to run the LaunchPad applet. Click **Yes**.



The LaunchPad permission dialog (Windows)

The LaunchPad permission dialog (Macintosh)

If you click the "Always trust" check box, this dialog will not appear again.

Configuring LaunchPad

When you edit, view, create, or import a file, TeamSite will start LaunchPad. You do not need to start LaunchPad manually unless you are installing or configuring it.

LaunchPad has several options that allow you to customize the way that you work. You will need to configure which file types are associated with your editing applications. To configure file types for Windows client platforms, see page 18. To configure file types for Macintosh or UNIX client platforms, see page 20.

You can also configure whether you edit files locally or remotely. You can choose to use Direct Edit, where you edit files directly on the server, or Remote Edit, which downloads files to your computer where you can edit them, then upload them to the server through LaunchPad.

Configuring File Types for Windows Platforms

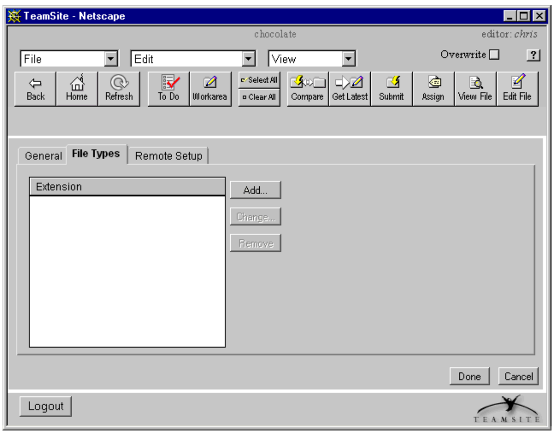
Windows associates different applications with different file types, so that when you double-click on a file, it knows what application to use to open it. You will only need to configure LaunchPad preferences for file types if they are *different* from your Windows preferences. For example, you may have a particular graphics editor set to open JPEG files in your Windows preferences, and want to use the same graphics editor to edit JPEGs from TeamSite, as well. In that case, you would not need to set preferences for JPEGs in LaunchPad.

However, you may have a browser set to open HTML files in your Windows preferences, but you may want to use a text editor or a WYSIWYG editor to edit HTML files from TeamSite. In that case, you would need to set preferences for HTML files in LaunchPad.

Adding a New File Type

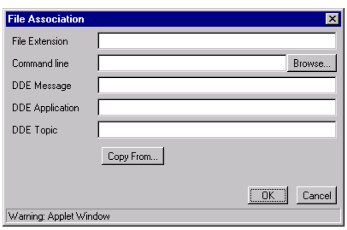
To add a new file type to your LaunchPad preferences:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear as part of the TeamSite window.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



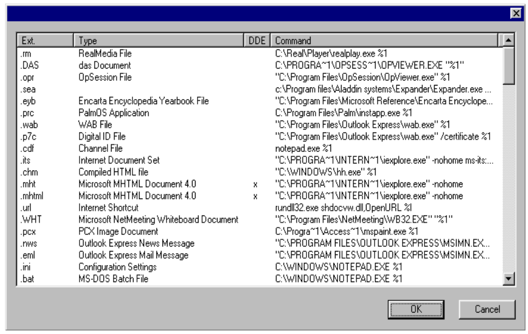
LaunchPad applet preferences: File Types tab

3. Click the **Add** button. An empty File Association window will appear.



File Association window

4. Unless you are familiar with DDE settings for your editing application, it is usually safest to copy all necessary information from an existing setting. Click the **Copy From** button.
5. An Extensions window will appear. Scroll down until you find an entry that uses the editing application that you want to use. Click the extension within that entry, then click **OK**.



Extensions window

6. All the necessary information will be copied into the File Type window. Edit the **Description of type** and the **Associated extension** boxes as necessary. The file extension must begin with a period (for example, `.html`, `.jpg`, `.gif`).

   Note: You can only configure one extension per entry. For example, although you might want to use the same editor for `.htm` and `.html` files, you would still need to create two different entries.

7. Click **OK**.

8. The new file type will appear in the File Types window. Click **OK**.

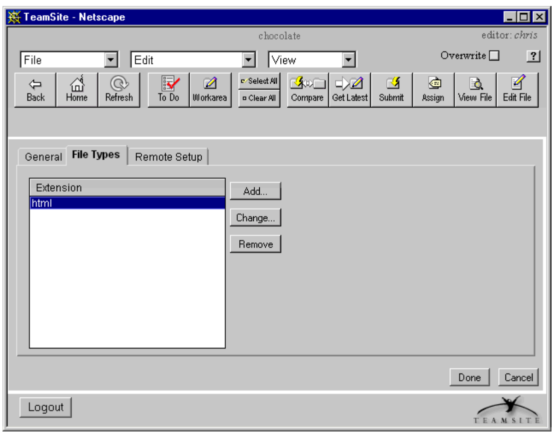
Editing File Types

To change the settings for an existing entry:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear as part of the TeamSite window.

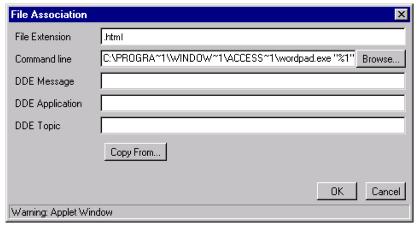
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.

3. Select the file type you want to change.



LaunchPad applet preferences: File Types tab

4. Click **Change**. The File Association window containing the settings for that file type will appear.



File Association window

5. From the File Association window, you can change settings using the **Copy From** button, as described above, or you can edit them manually. Click **OK**.

6. The edited file type will appear in the File Types window. Click **Done**.

Configuring File Types for Macintosh or UNIX

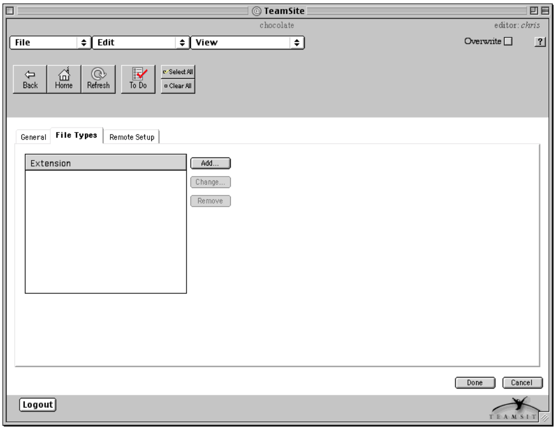
LaunchPad allows you to associate different applications with different file extensions, so that when you double-click on a file, it knows what application to use to open it. For example, if you plan to edit HTML files, you will need to configure the `.html` or `.htm` file type.

Adding a New File Type

To add a new type of file to your LaunchPad preferences:

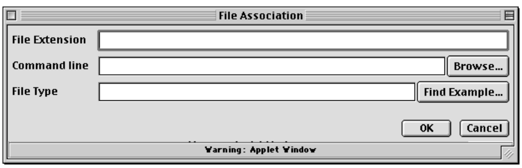
1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear as part of the TeamSite window.

2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



LaunchPad applet preferences: File Types tab

3. Click **Add**. An empty File Association window will appear.



File Association window

4. Enter the file extension you want to configure in the **File Extension** box. The file extension must begin with a period (for example, `.html`, `.jpg`, `.gif`).

   Note: You can only configure one extension per entry. For example, although you might want to use the same application for `.htm` and `.html` files, you would still need to create two different entries.

5. Click **Browse**. In the pop-up window, browse to the location of the application you want to use. Select the application and click **Choose**.

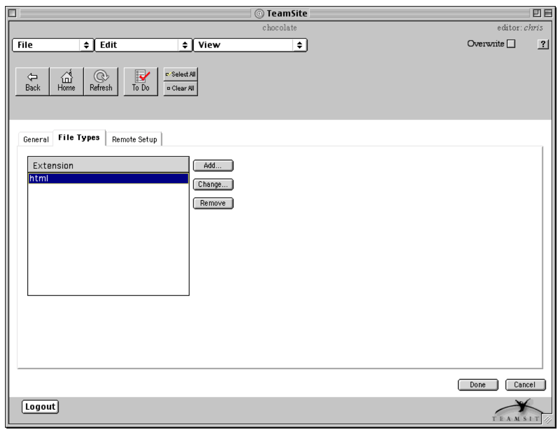
6. Click **OK**. The new file type will appear in the File Types window.

Editing File Types

To change the settings for an existing entry:

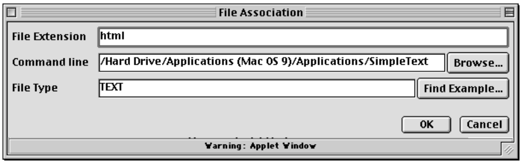
1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.

2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



LaunchPad applet preferences: File Types tab

3. Select the file type you want to change and click **Change**. The File Association dialog will appear.



File Association window

4. Click **Browse**. In the pop-up window, browse to the location of the application you want to use. Select the application and click **Choose**.

5. Click **OK**. The edited file type will appear in the File Types window.

Direct Edit: Saving Files Directly to the Server

You can use this option if you are using Windows and can access the TeamSite server on your LAN, or if you are using UNIX. Direct Edit is not recommended for Macintosh users.[1]

To use Direct Edit:

1. (Windows only)

   Using Windows Explorer, map your TeamSite server to a networked drive. In the Path field, type in the directory for your main branch (for example, `\\`*`SERVERNAME`*`\IWDEFAULT\MAIN` or `\\`*`SERVERNAME`*`\IWMAIN`).

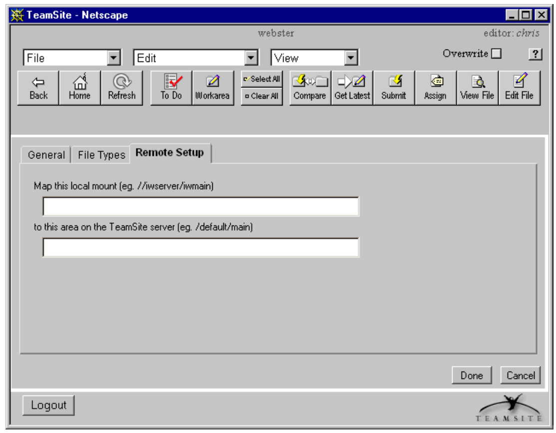
1. Certain Macintosh applications are incompatible with LaunchPad Direct Edit due to differences in the way they handle file types. Text editors such as BBEdit and SimpleText will usually work with Direct Edit for the Macintosh.

Map Network Drive window

2. (All platforms)

   From the TeamSite window, select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.

3. Select the **Remote Setup** tab.



The Remote Setup tab

4. Enter the local path in the **Map this local mount** box.

   For example (Windows client) `I:\`*`branchpath`*`\WORKAREA\`*`workarea name`* or (UNIX client) `//iwserver/iwmain/`*`branch-path`*`/WORKAREA/`*`workareaname`*).

5. Enter the TeamSite path in the **to this area on the TeamSite server** box (for example, `/default/main/`*`branch-path`*`/WORKAREA/`*`workareaname`*).

Remote Edit: Editing Files on Your Computer

All users can edit files remotely with LaunchPad. You should use this option if you are using a Macintosh, if you are using Windows and cannot access the TeamSite server through a LAN, or if you use multiple TeamSite servers on a regular basis.

With Remote Edit, when you edit a file, LaunchPad downloads a temporary copy of the file to your local computer. LaunchPad then opens the file in the editing application that you have configured.

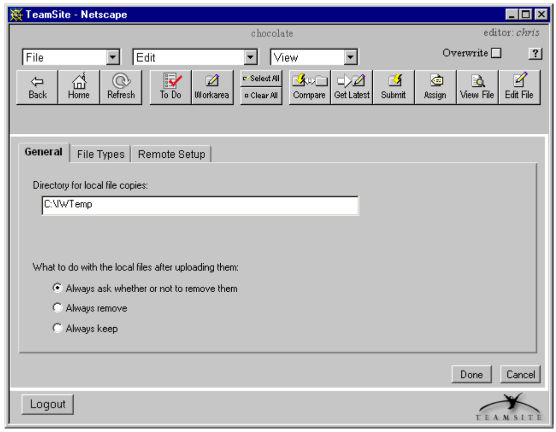
When you have finished editing the file, you must tell LaunchPad to upload the temporary copy to the TeamSite server.

Configuring Remote Edit Preferences

You can tell LaunchPad whether to remove or keep the temporary copies of files that you have edited when you upload these files. To set this preference:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.

2. Click the **General** tab. This tab allows you to change the directory for TeamSite temporary files. However, if you change this directory, LaunchPad may not work properly.



Setting preferences in the LaunchPad applet

3. Under **What to do with the local files after uploading them**, select the option that best describes the behavior you want.

   If you select **Always remove** or **Always keep** LaunchPad will not query you at the time of upload. **Always remove** only removes the temporary copies of files that LaunchPad has downloaded from TeamSite. It will not affect any other copies of the files that you have on your computer. **Always keep** leaves the temporary files on your computer for further use. You may want to use this option if you want to edit the files again after uploading them. If you use this option, you will need to remove the files manually at some point.

4. Click the **Remote Setup** tab and clear both fields.

Using Remote Edit

To edit files on your local computer:

1. From the TeamSite window, select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.
2. Select the **Remote Setup** tab.
3. Clear both fields.

Future edits will download a temporary copy of the file to your computer and automatically open it in the editing application that you have configured LaunchPad to use. You will then need to upload the file for your changes to show up in TeamSite.

If you have closed a file or quit your editing application, and you want to edit the file again:

1. Click the file name in the LaunchPad window.
2. Click **Edit**.
3. The file will open in your editing application.

Using a Different Editing Application

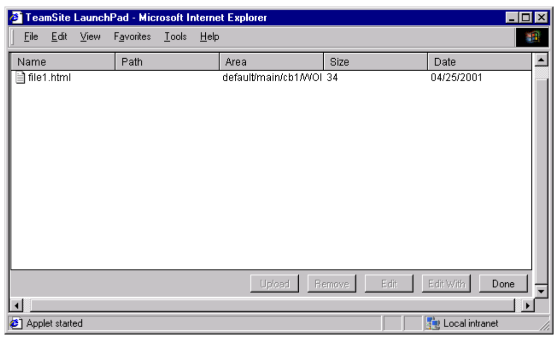
You can also choose a different editing application than the one you have set in your LaunchPad Preferences.

1. Click the file name in the LaunchPad window.
2. Click **Edit With**.
3. A browsing window will appear. Browse your computer until you locate the editing application that you want to use, and click its name.
4. Click **OK**. The file will open in the application that you have chosen.

Uploading Files

LaunchPad permits you to upload the files you have edited to the TeamSite server whenever you are connected to the TeamSite server.

A file that has been edited since it was last uploaded will be displayed in the LaunchPad window with a (Changed) icon. A file that has not been edited, or that has been uploaded since it was last edited, will be displayed with an (Unchanged) icon.



Viewing local files through the LaunchPad applet

To upload files:

1. Save your changes.

2. In the TeamSite GUI, select **View > List Local Files** and click the names of the files you want to upload.
3. Click **Upload**.
4. A dialog box will appear asking if you want to delete the copy of the files on your hard disk. If you want to continue editing the files, click **Keep**. If you are finished with the files, click **Remove**. To cancel the operation and close the dialog box, click **Cancel**.
5. TeamSite will upload the files you have just edited to the TeamSite server.

If you are finished with the files that appear in the LaunchPad window and do not want to upload them, you can delete them from your hard disk without uploading them first.

1. Click the file names in the LaunchPad window.
2. Click the **Remove** button.

Logging Out of TeamSite

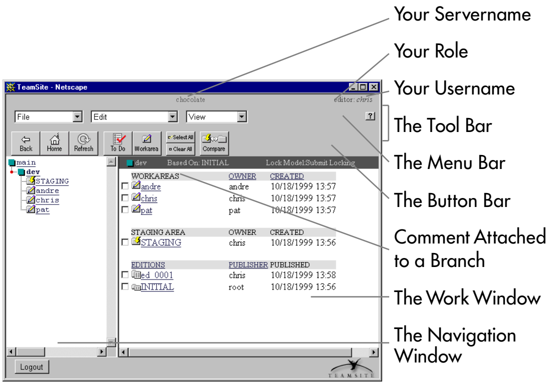
When you have finished your work and want to log out of TeamSite, click the **Logout** button in the lower left hand corner of the TeamSite window. A confirmation window will appear. Click **OK**. TeamSite will log you out and return you to the login screen.

TeamSite GUI Views

TeamSite has two main views: the Workflow view, which displays information about jobs and tasks, and the Branch view, which allows you to navigate through TeamSite areas. In the Workflow view, you can learn about the jobs and tasks relating to you by clicking the **To Do** button in the Button Bar. To view the details of an individual job or task, click its underlined name.

You can move from the Workflow view to the Branch view by clicking the **Workarea** button in the Button Bar. TeamSite will display a list of the branches and workareas where you have access. To navigate into a branch or workarea, click its name. The TeamSite window will display the Branch view.

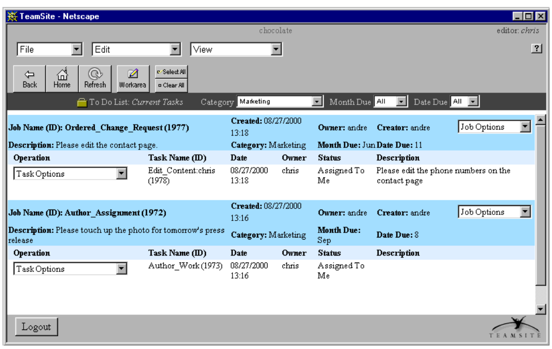
In the Branch view, the left-hand pane (the Navigation Window) allows you to navigate through TeamSite. The right-hand pane (the Work Window) will be updated as you navigate through the system. The top of the screen contains a Button Bar, containing buttons for the most frequently used commands, and a Menu Bar, containing drop-down menus for all TeamSite commands. To return to the Workflow view, click the **To Do** button in the Button Bar.



The TeamSite window, displaying a branch view

Using the TeamSite Workflow View

The TeamSite Workflow view allows you to track your current jobs and tasks, to see the history of a job, and to see what files make up a task. To see jobs and tasks that you own, click the **To Do** button in the Button Bar. To further refine this view, select one of the options in the **View** menu.



A Task list

To go to the Branch view, click the **Workarea** button in the Button Bar.

Navigating Through the TeamSite Branch View

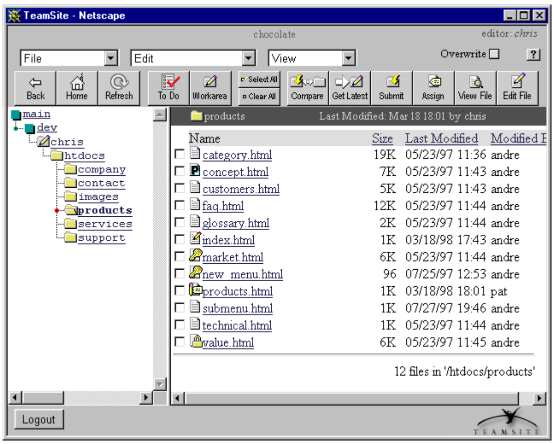
To navigate through TeamSite, single-click the underlined name of a branch, workarea, or directory in the Navigation Window (the left-hand pane of the TeamSite window). The contents of that branch, workarea, or directory will be displayed in the Work Window (the right-hand pane of the TeamSite window). Click the name of a workarea, staging area, edition, or directory in the Work Window to display its contents in the Work Window and to update the Navigation Window to show your current position in TeamSite. The Navigation Window will show the branch elements or directories at your current level, and your current location will be highlighted with a red dot. Click the **Back** button in the Button Bar to return to the previous view.

While both the Work Window and the Navigation Window can be used to navigate, you can only manipulate individual files in the Work Window. To view a file in a separate browser window, click its underlined name. To navigate into a directory, click its underlined name. To perform an operation on a file or directory, click the check box next to the file name. You can sort files and directories by name, owner or publisher, and date by clicking on the underlined attribute names in the Work Window. By default, files are sorted by name.

In a workarea, files and directories may be displayed with several different icons. Each icon contains information about that file or directory's status. See the "TeamSite Icon Reference" on page 87 for a complete list of TeamSite icons.

You may sometimes need to refresh the Work Window to see changes that have been made. You can do this by clicking the name of your current directory in the Navigation Window.

To return to the Workflow view, click the **To Do** button in the Button Bar.



A workarea containing modified, assigned, locked, and private files

Setting Your Home Page

To set your Home page:

1. In the TeamSite GUI, navigate to the location or workflow view that you would like to go to automatically when you first log in.
2. Select **Edit > Set Home Page**.

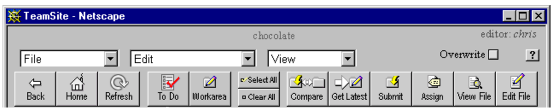
Your Home page setting will be stored on the TeamSite server. You can change this setting at any time, or reset it to the default setting. If you change the name of the path to your Home page (for example, if you rename a directory in the path), you will need to set your Home page again.

To reset your Home page to the default setting, select **Edit > Reset Home Page**.

TeamSite GUI Elements

The Tool Bar

The Tool Bar consists of a Button Bar, containing the most frequently used commands, and a Menu Bar which displays drop-down menus containing all available commands. Various commands are displayed in the Menu Bar and Button Bar at different times according to when you can use them.

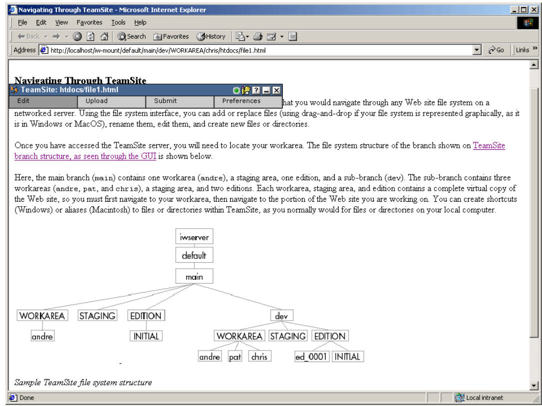


Editor's Tool Bar

The Menu Bar contains three drop-down menus: **File**, **Edit**, and **View**. Each menu is displayed only when you can use at least one of the commands that it contains. Individual commands within the menus are displayed only when you can use them. Your TeamSite server may have some custom menu items not described in this manual.

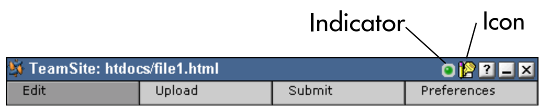
The SmartContext Editing Tab

When you click the name of a file in the TeamSite GUI, the file will appear in a new browser window containing the TeamSite SmartContext Editing tab. This tab displays information about the current status of the file shown in the browser window. The buttons on this tab allow you to edit the current page.



A browser window with the SmartContext Editing tab

The SmartContext Editing tab contains an icon and an indicator which tell you about the file's status. The icon tells you whether the file has been modified or locked. The indicator tells you whether or not you can edit the file.



The SmartContext Editing tab

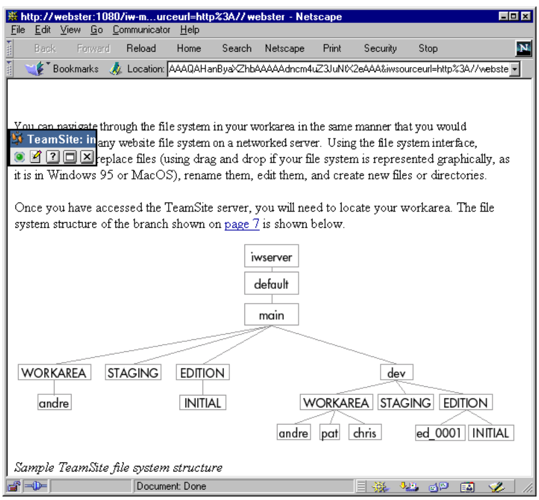
Indicator	Status
Black	You cannot modify this file; it is locked or you do not have permission.
Green	You can modify this file.
Yellow	You can modify this file, but a newer version is in the staging area.
Red	You can modify this file, but it is in conflict with the staging area.

To learn more about the file's status, move your mouse arrow over the icon. A ToolTip will appear with more detailed information.

The SmartContext Editing tab contains several buttons. You can configure which buttons appear through the Preferences button. For more information about configuring the SmartContext Editing tab, see "Setting Tab Preferences" on page 30.

Minimizing the SmartContext Editing Tab

If you don't need to use the SmartContext Editing tab, you can minimize it to reduce its size and loading time. To minimize the SmartContext Editing tab, open the tab and click the  (Minimize) button. The minimized version of the tab will replace the full version of the tab.



A browser window with the minimized SmartContext Editing tab

To reopen the SmartContext Editing tab, click the  (Maximize) button on the minimized tab.

Closing the SmartContext Editing Tab

To close the SmartContext Editing tab, click the  (Close) button on the tab. To get it back, click the **Back** button in your browser, or return to the TeamSite GUI and click the name of a file.

Moving the SmartContext Editing Tab

To move the SmartContext Editing tab, click on the blue title bar and drag it to where you want it to be.

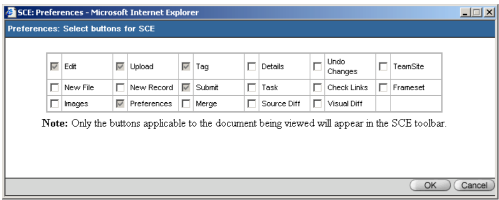
SmartContext Editing and LaunchPad

When you are using SmartContext Editing, if you have LaunchPad set to use Remote Edit, you should configure your LaunchPad to **Always Remove** uploaded files (see page 23). If you do not set this option, the LaunchPad window will rapidly fill up with the files that you edit, and they will not be automatically removed. You can, however, remove these files manually.

Setting Tab Preferences

You can configure which buttons make up the SmartContext Editing tab; however, only the buttons that apply to the document being viewed actually appear. To choose the buttons:

1. Click the **Preferences** button in the SmartContext Editing tab. The Preferences window will appear.



The SmartContext Editing Preferences window

2. Click the check boxes for the buttons you want to appear on the tab.

The Casual Contributor Interface

The Casual Contributor Interface allows you to click on links in Web pages that will take you to a specific part of the TeamSite GUI. Possible actions are:

- Assign—prompts you to create a new task with a specific file attached (available only for non-Authors).
- Edit—opens a file for editing.
- SCE—opens a file in a browser for use with SmartContext Editing.

If you have logged in to TeamSite recently enough that your authentication has not expired, you will be taken directly to the appropriate page or part of the TeamSite GUI. Otherwise, you will have to log in again, and you will be taken to your Home page. The amount of time you have before your authentication expires is configurable by your site administrator.

The appearance and placement of these links is configured on a site by site basis. Consult your site administrator for more information.

The File System Interface

The file system interface allows you to manage your web content in TeamSite as if it were on a mounted drive on the network. The file system interface is used primarily for file management functions such as moving and copying files, and it can also be used to edit files. It also allows the use of links checkers and scripts that need to be able to access or create files. In addition, most TeamSite operations can be performed from a UNIX command-line interface (see the *Command-Line Tool Reference Manual*).

Accessing the TeamSite File System Interface

You can access TeamSite as you would any networked UNIX server:

Windows client

1. Use Network Neighborhood to locate the TeamSite server. Alternatively, select **Start > Find…Computer** to locate the server.
2. Double-click the server name to open it. If you are asked for a username and password, enter your TeamSite username and password. The TeamSite server will appear on your desktop.

Macintosh client

1. In the Chooser, select **Appleshare**.
2. Select the name of the TeamSite server. Click **OK**.
3. If you are asked for your username and password, enter your TeamSite username and password, and click **OK**.
4. Select the items you want to use, and click **OK**. The TeamSite server will appear on your desktop.

UNIX client

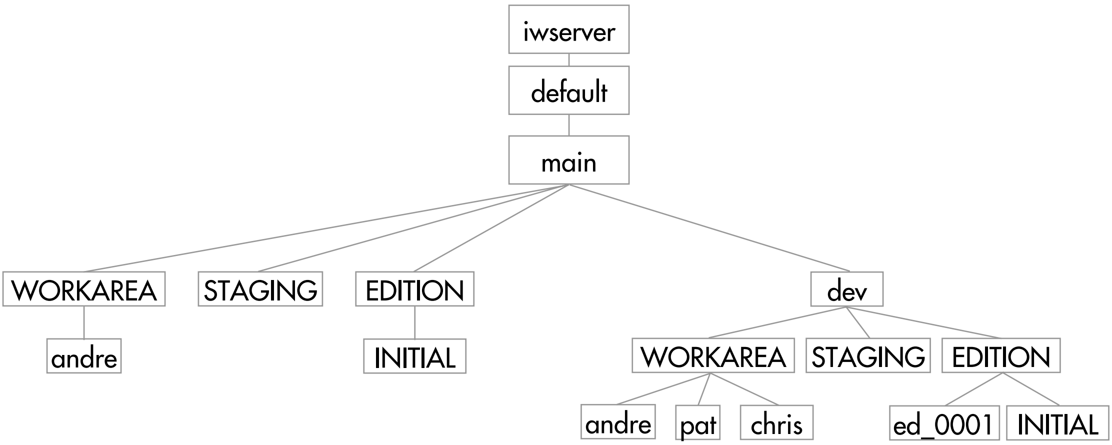
Log in to the TeamSite server using your TeamSite username and password.

Navigating Through TeamSite

You can navigate through the file system in your workarea in the same manner that you would navigate through any Web site file system on a networked server. Using the file system interface, you can add or replace files (using drag-and-drop if your file system is represented graphically, as it is in Windows or MacOS), rename them, edit them, and create new files or directories.

Once you have accessed the TeamSite server, you will need to locate your workarea. The file system structure of the branch shown on page 15 is shown below.

Here, the main branch (`main`) contains one workarea (`andre`), a staging area, one edition, and a sub-branch (`dev`). The sub-branch contains three workareas (`andre`, `pat`, and `chris`), a staging area, and two editions. Each workarea, staging area, and edition contains a complete virtual copy of the Web site, so you must first navigate to your workarea, then navigate to the portion of the Web site you are working on. You can create shortcuts (Windows) or aliases (Macintosh) to files or directories within TeamSite, as you normally would for files or directories on your local computer.



Sample TeamSite file system structure

Chapter 3

TeamSite Basics

This chapter discusses basic TeamSite functionality such as:

- Creating New Files (page 33)
- Creating New Directories (page 35)
- Deleting Files and Directories (page 35)
- Editing Files (page 35)
- Importing Files into Your Workarea (page 39)
- Renaming Files (page 40)
- Moving Files (page 40)
- Copying Files (page 41)
- Viewing Files (page 41)
- Submitting Files to the Staging Area (page 42)
- Updating Your Workarea (page 45)

TeamSite supports the input of multiple languages through the GUI. For details, see Appendix B, "Internationalization."

Creating New Files

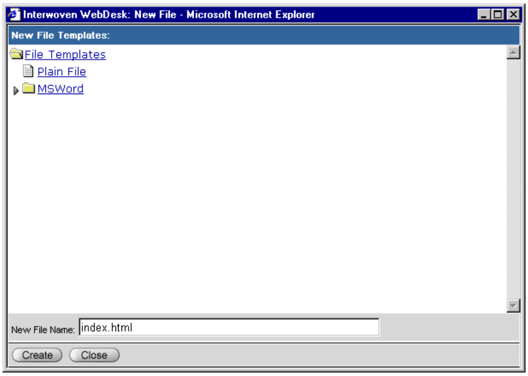
You can only create new files in directories where you have write permissions.

Before you create or edit files with TeamSite, you must configure TeamSite's helper applet, LaunchPad (see "About LaunchPad" on page 17).

To create a new file in a workarea where you have access:

1. Go into the workarea by clicking its name. When you are in a workarea, the **New File** command will appear in the **File** menu. Within the workarea, navigate to the directory where you want to place the new file.
2. Select **File > New File**. The New File dialog box will appear.

   In the New File dialog box, if the current directory location is not where you want to put the new file, navigate to the directory where you want to put the file.



The New File window

3. Select the type of template you want to use, then select the specific template that you want to use.[1] If you do not want to use a template, select **Plain File**.

4. In the **New File Name** box, type the name of the file you want to create. You will need to include the suffix (that is, *filename*.html). Do not use the following characters in file names:

   \ / : * ? " < > |

   If a file with the same name exists in another workarea and is locked, you will not be able to create the file. If a file with this name exists in the staging area, you will be asked whether you want to create a new file or bring a copy of the file in the staging area into your workarea. Follow the directions in the dialog boxes that appear.

5. Click **Create**.

UNIX users: The file will open in the application associated with its file extension. Edit the file as you normally would, and save your changes. If you are using Direct Edit (see page 22), the file will be saved to the TeamSite server each time you save it. If you are using Remote Edit (see page 23), your changes will not be uploaded until you quit your editing application.

Windows and Macintosh users: The file will open in the application associated with its file extension. If you are using Direct Edit (see page 22), changes will be saved to the TeamSite server when you save the file. If you are using Remote Edit (see page 23), its name will appear in the LaunchPad window, and you must upload it after you have saved it.

1. The templates you select through the New File window are not TeamSite Templating templates. For more information about New File templates, see page 99. For more information about TeamSite Templating, consult *Using and Configuring TeamSite Templating*.

Creating New Directories

You can only create directories inside directories where you have write permissions.

To create a new directory in a workarea to which you have access:

1. Go into the workarea by clicking on its name. Within the workarea, navigate to where you want to place the new directory. When you are in a workarea, the **New Directory** command will appear in the **File** menu.
2. Select **File > New Directory**. A dialog box will appear, asking you to enter the name of the new directory.
3. Type the name of the directory you want to create. Do not use the following characters in directory names:

   `\ / : * ? " < > |`
4. Click **OK**. An empty directory will be created.

Deleting Files and Directories

To delete files or directories in your workarea:

1. Navigate into your workarea and click the check boxes next to the files or directories that you want to delete.
2. Select **File > Delete**. A dialog box will appear asking you to confirm these deletions.
3. Click **OK**.

The list of files in your workarea will be updated to reflect the deletions.

Editing Files

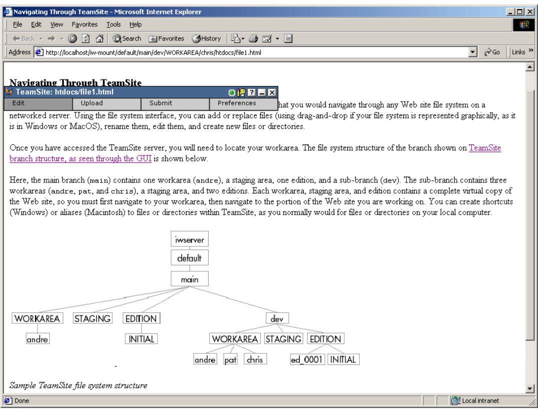
TeamSite allows you to edit files from the TeamSite GUI in two ways: through SmartContext Editing, where you browse the Web site and edit pages as you view them, or through the main TeamSite GUI, where you browse the directory structure of the Web site and edit individual files.

Before you create or edit files with TeamSite, you must configure LaunchPad on your computer (see “About LaunchPad” on page 17).

Editing Files Through SmartContext Editing

1. To edit a file using TeamSite SmartContext Editing, click the name of a file in the Work Window or a Task Details window in the TeamSite GUI. The file will open in a new browser window containing the TeamSite SmartContext Editing Tab.

2. Navigate through the Web site by clicking links until you reach the page you want to edit.



A browser window with the SmartContext Editing tab

3. Click the **Edit** button on the tab. The file will open in your editing application.

4. Edit the file as you normally would. Save the file when you are finished editing it.

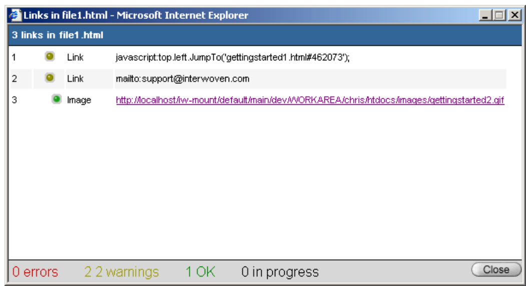
5. To see the changes you made, return to the SmartContext Editing window and click the **Refresh** button on the pulled-out tab. Your changes will be uploaded at this time.

Checking Links with SmartContext Editing

To check links in your current page:

1. If the **Check Links** button does not appear in the SmartContext tab, use the Preferences button to add it (see "Setting Tab Preferences" on page 30).

2. Click the **Check Links** button. The Links window will appear.



The Links window

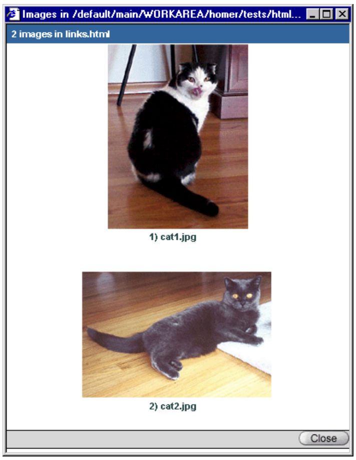
3. This window shows the status of the links that appear on the current page:

Green	The link works.
Red	The link is broken.
Yellow	The link can't be validated as either correct or broken by this link checker.

Editing Images with SmartContext Editing

To edit the images that appear in a page:

1. If the **Images** button does not appear in the SmartContext tab, use the Preferences button to add it (see "Setting Tab Preferences" on page 30).
2. Click the **Images** button on the tab. An Images window will appear, containing all the images that appear on the page.



The Edit Images window

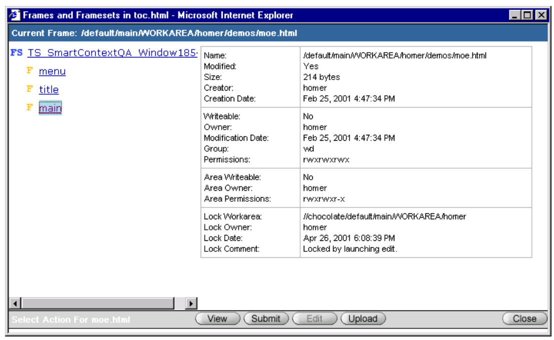
3. In the Images window, click the image you want to edit. A new window will appear, displaying the image and the SmartContext Editing tab.
4. Edit the file using SmartContext Editing (see page 36). Save the file when you are finished editing it.

SmartContext Editing and Framesets

If you are editing a frame-based page, a SmartContext Editing tab will appear in each frame so that you can select which file to edit. However, you can also edit the frameset file itself.

To edit a frame-based page's frameset file:

1. If the **Frameset** button does not appear in the SmartContext tab, use the Preferences button to add it (see "Setting Tab Preferences" on page 30).
2. Click the **Frameset** button on the tab. The Frames and Framesets window will appear with a list of the frameset file and all the files it contains. Frameset files are marked with an FS; files contained within the frameset are marked with an F.



The Frames and Framesets window

- To get information about any of the files listed, click its name.
- To edit one of the files, click its name, then click **Edit**.

- To submit one of the files, click its name, then click **Submit**.
- To view one of the files in its editing application, click its name, then click **View**.
- To upload one of the files you have edited to TeamSite, click its name, then click **Upload**. This will do the same thing as the Upload button in LaunchPad (see "Uploading Files" on page 24.

Editing Files Through the TeamSite GUI

To edit a file through the main TeamSite GUI using your default editing application:

1. In the TeamSite GUI, navigate to the directory containing the file you want to edit.

2. Click the check box next to that file.

3. Click the **Edit File** button in the Button Bar or select **Edit > Edit File**.

   If you are using LaunchPad's Direct Edit feature (see page 22), changes will appear on the server as soon as you save them. If you are using Remote Edit (see page 23), a temporary version of the file will be downloaded to your computer, and its name will appear in the LaunchPad window. Changes will not appear until you upload the files from LaunchPad.

4. The file will open in your editing application. Edit the file as you normally would. If you are using Remote Edit, you will need to upload the file from LaunchPad after you have saved it.

Editing Files With an Alternate Application

To edit a file using an alternate editing application:

Macintosh and Windows users only:

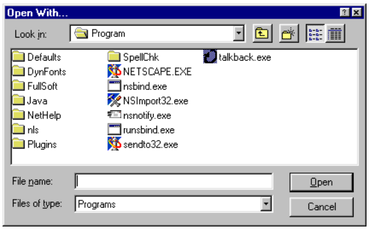
1. Navigate to the directory containing the file you want to edit. Click the check box next to that file.

2. Select **Edit > Edit With.**

   An Open With window will appear. Select the editing application you want to use from the list displayed.

The Open With window

   If you cannot find the application you want to use, click the **Other** button and navigate to the location of the editing application. Click **Open**.



Locating an editing application

3. The file will open in your editing application. Edit the file as you normally would. If you are not using Direct Edit, you will need to upload the file from LaunchPad after you have saved it.

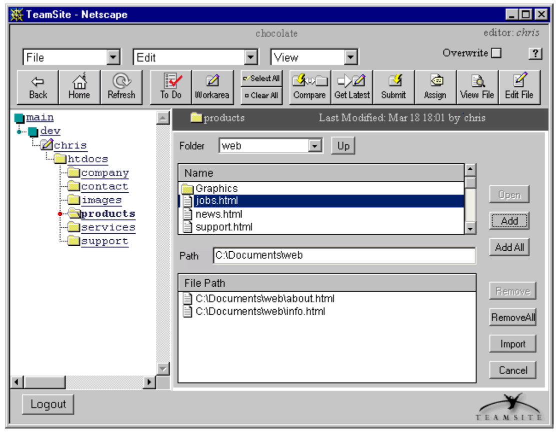
Importing Files into Your Workarea

TeamSite lets you import files residing on your hard drive into the TeamSite system.

Importing Files

To import a file:

1. Select **File** > **Import Files**.
2. The LaunchPad applet will open within the TeamSite window.
3. Use the **Name** navigation box to browse to the location of your files on your hard drive.
4. Select the file you want to import and click **Add**. The selected file will appear in the list at the bottom of the window. Continue adding files until you are finished.



Importing Files

5. When you are finished adding files, click **Import**. Your files will be imported to the TeamSite server.

Renaming Files

The TeamSite Rename command gives a file a new name, but does not change the directory path to the file. If you want to both rename and move a file, you must use the Move command.

You can only rename files if you have write permissions for the directory containing the files. To rename a file:

1. Select the check box next to the name of the file that you want to rename.
2. Select **File** > **Rename**.
3. A dialog box will appear. Type the new name (not the full path) of the file, including extension. Do not use the following characters in the file's name:

   `\ / : * ? " < > |`
4. The file will appear in the workarea with a (Modified) icon.

Renaming a file creates a new file with the new name and deletes the old file. The version history of the file will keep track of the name change—older versions of the file will not be lost.

You should submit the deleted file to the staging area (see page 65).

Moving Files

To move a file from one directory to another:

1. Select the check box next to the name of the file that you want to move.
2. Select **File** > **Move**.
3. A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be moved to. Be sure to include the file name in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

   `/htdocs/products/index.html` would specify an absolute path.

   `products/index.html` would specify a relative path.

   `../support/index.html` would specify a relative path.
4. The file will appear in the new location with a (Modified) icon.

The version history of the file will keep track of the change in location—older versions of the file will not be lost.

Copying Files

To copy a file from one directory to another:

1. Select the check box next to the name of the file that you want to copy.
2. Select **File > Copy**.
3. A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be copied. Be sure to include the file name in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

   `/htdocs/products/index.html` would specify an absolute path.

   `products/index.html` would specify a relative path.

   `../support/index.html` would specify a relative path.
4. A copy of the file will appear in the new location with a  (Modified) icon.

Viewing Files

You can view any file that you have read access to, even if it is locked by another user.

Browser View

To view a file within the context of the Web site, click its underlined file name within a workarea, staging area, or edition. The file will appear in a new browser window. You may need to clear the disk cache in order to see changes immediately.

If your Web site uses frames, you may need to click the top-level file (often `index.html`) and navigate to the file you need within the frame.

If you need to see the end of the page's URL (for example, if you need to see the name of the displayed file), click the browser's **Location** text box, then press the **End** key. To return to the beginning of the URL, press the **Home** key.

Source View

To view a read-only copy of a document in your preferred editing application, click the check box next to that file, then click the **View File** button in the Button Bar or select **Edit > View File**. A read-only copy of the file will be opened in your preferred editing application. You will be able to edit this copy, but you will not be able to save any changes you make.

Submitting Files to the Staging Area

Submitting Files Using SmartContext Editing

If you have been using SmartContext Editing and want to submit the file that you have edited:

1. Click the **Submit** button in the SmartContext Editing tab for the file you want to submit.
2. A dialog box will appear. Enter any comment you want to attach to the file's history, and click **OK**.

Your changes will be uploaded (if they haven't been already) and the file will be submitted to the staging area.

Submitting Files Using the TeamSite GUI

When you submit files to the staging area, you can either submit them directly, or invoke a workflow process (using a submit job template) which will submit the files.

Submit job templates are configured on an individual site basis. They may perform automated tasks such as post-processing or links checking before submitting your files. To find out what submit job templates are available on your system, consult your system administrator.

The **Submit** button in the TeamSite GUI may be configured to use either the direct submit or the workflow process submit (see below). Consult your system administrator to find out how your system is configured.

Submitting Files Directly

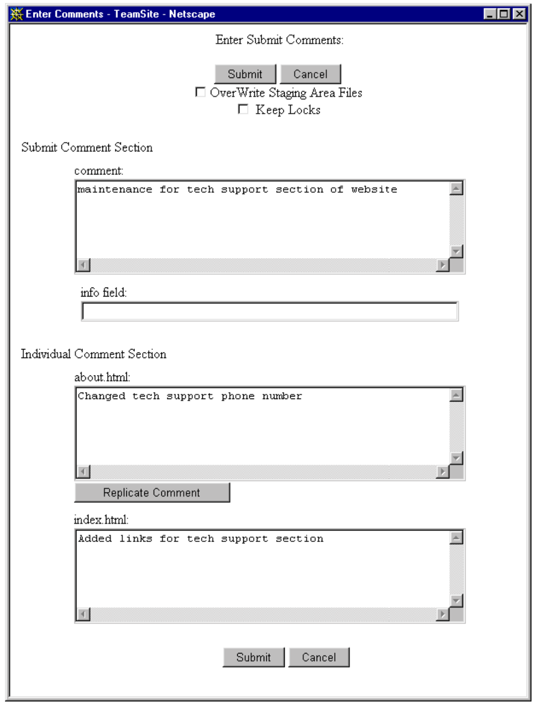
To submit files or a directory to the staging area (you can only submit one directory at a time):

1. Select the check boxes next to the items that you want to submit in your workarea. If no items are selected, TeamSite will submit your entire current directory. To submit an entire workarea, go to the top level of the workarea and do not select any check boxes.
2. Select **File > Submit--Direct**. A Submit window will appear.
3. Enter any comments you have in the comment boxes. The Submit window contains two sections: a Submit Comments section, which consists of a section where you can enter comments for the entire Submit operation and a field where you can enter keywords (for example, for automatic triggers), and an Individual Comments section, where you can attach comments to each file's history.

4. If you want to overwrite files and directories in the staging area with the files in your workarea, regardless of which version is newer, click the **OverWrite Staging Area Files** check box. If you are submitting a directory, this operation is equivalent to deleting the directory from the staging area and then submitting the directory from your workarea. Any files that are in that directory in the staging area but which are not in the directory in your workarea will be deleted from the staging area.

5. If you want to retain any locks you have on files being submitted, click the **Keep Locks** check box. If you do not select this option, all locks will automatically be released upon submission.

6. Click the **Submit Files** button.



Submit Comments window

Submitting Through a Workflow Process

To submit files using TeamSite workflow:

1. Select the check boxes next to the items that you want to submit in your workarea. If no items are selected, TeamSite will submit your entire current directory. To submit an entire workarea, go to the top level of the workarea and do not select any check boxes.

2. Select **File > Submit**.

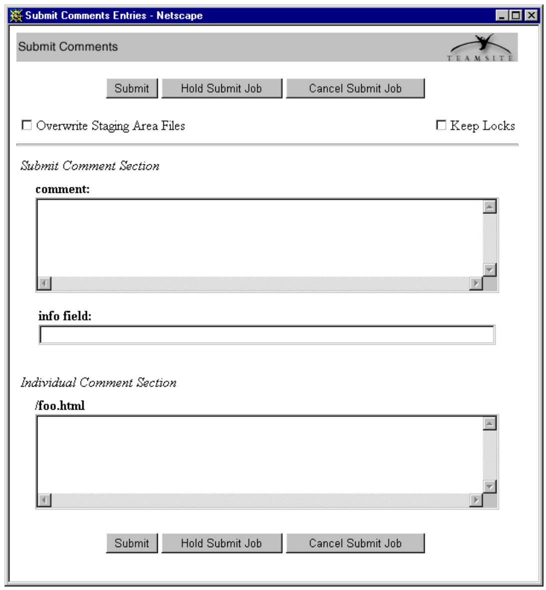
3. If there are multiple submit job templates available, you will be asked to choose one. If there is only one, its Submit window will appear. The Submit window's appearance may vary from one job template to another. The rest of this section refers to the default submit job template.

4. Enter any comments you have in the comment boxes. The Submit window contains two sections: a Submit Comments section, which consists of a section where you can enter comments for the entire Submit operation and a field where you can enter keywords (for example, for automatic triggers), and an Individual Comments section, where you can attach comments to each file's history.

5. If you want to overwrite files and directories in the staging area with the files in your workarea, regardless of which version is newer, click the **OverWrite Staging Area Files** check box. If you are submitting a directory, this operation is equivalent to deleting the directory from the staging area and then submitting the directory from your workarea. Any files that are in that directory in the staging area but which are not in the directory in your workarea will be deleted from the staging area.

6. If you want to retain any locks you have on files being submitted, click the **Keep Locks** check box. If you do not select this option, all locks will automatically be released upon submission.

7. Click the **Submit** button to continue with the Submit operation. You also have the option of holding the submit job and submitting the files later, or cancelling it.



Default Submit job window

After You Submit

Submitting Conflicting Files

If you are submitting a workarea or directory and there are conflicts, the Compare screen will appear. In this screen, you have the option to merge files (see page 56), overwrite your changes (see page 51), or overwrite the changes in the staging area.

To overwrite changes in the staging area with your modifications:

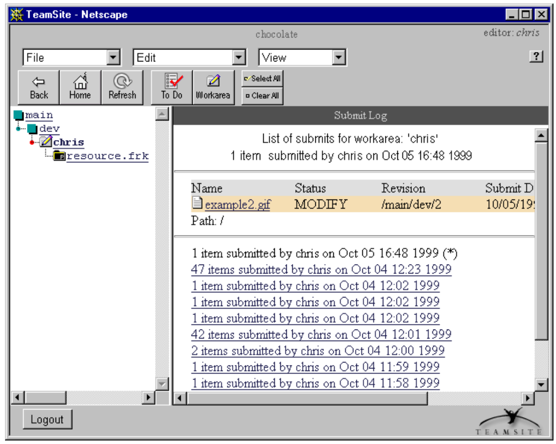
1. In the Compare screen, the **Overwrite** button in the Button Bar will already be selected. Select the check boxes next to the files that you want to overwrite in the staging area.
2. Click **Submit**. This will overwrite the files in the staging area with the selected files in your workarea and submit any files that were not in conflict from the original submission.

Submitting Directories

When you submit a directory, only the files that have been changed (including modified files in subdirectories) are actually submitted. For a complete list of which individual files were submitted from a workarea, go into that workarea and select **View > Submit Log**.

Viewing Submit Logs

To learn which files have been changed in the staging area since it was last published, go into the staging area and select **View > Submit Log**.



Submit Log

Updating Your Workarea

Files in the staging area can be changed by other users without ever affecting your workarea. If you want to be working on the latest versions of all the files in your branch, you will need to update your workarea from the staging area. If you want to continue working on the version of your files already in your workarea, do not update your workarea. However, if you do not update your workarea, you may encounter conflicts when you edit files and submit them to the staging area.

To update your workarea:

1. Click the check box next to the files or directory in your workarea that you want to update from the staging area. If no files or directory is selected, your current directory will be updated. If you are the top level of your workarea and no items are selected, your entire workarea will be updated.
2. Click the **Get Latest** button in the Button Bar, or choose **File > Get Latest**.

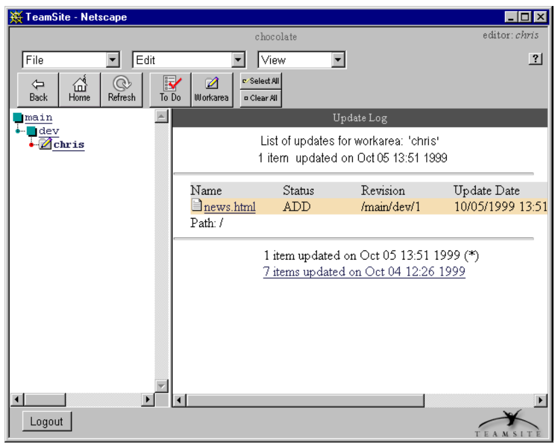
If there are no conflicts, the Get Latest command compares all of the files in the selected area with the corresponding files in the staging area and updates your workarea with the latest versions. If a file in your workarea is a newer version than the file in the staging area, it will be left alone.

If there are conflicts (corresponding files have been changed both in your workarea and in the staging area), a Compare screen will appear. For more information about the Compare screen, see page 51. Using the Compare screen, you can merge the two versions or choose one over the other (see page 51). To overwrite the files in your workarea with files from the staging area, regardless of which version is newer, select the **Overwrite** button in the Button Bar (it will turn red), then choose **Get Latest**. Use this option only if you want to throw away modifications that you have made.

If you use the **Overwrite** button to overwrite a directory, this operation is equivalent to deleting the directory from the workarea and then copying the directory from the staging area. Any files that are in that directory in the workarea but which are not in the corresponding directory in the staging area will be deleted from the workarea.

To learn what files the Get Latest command has updated in your workarea, select **View > Update Log**. Click underlined entries in the Update Log window to see a list of the files that were updated in each Get Latest operation. Click individual filenames to view the version of the file that was submitted.

The entries are sorted by date.



Update Log

Chapter 4

Version Management

This chapter discusses advanced TeamSite version management features such as:

- Viewing File Properties (page 47)
- Copying Files to Other Areas (page 49)
- Comparing Files (page 51)
- Listing Modified Files (page 58)
- Locking Files (page 59)
- Viewing File Histories (page 61)
- Marking Files and Directories Public or Private (page 64)
- Deleting Files and Directories from the Staging Area (page 65)
- Metadata Capture (page 65)
- Metadata Search (page 67)
- Publishing Your Work (page 68)

Viewing File Properties

TeamSite's File Properties feature allows you to determine basic file properties such as the size of a file, when it was created and by whom, whether you have write access to it, what exactly the permissions are, what user and group have access to it, whether you have access to the area it resides in, who the owner and group for that area are, whether it is locked (and by whom and in what workarea), whether it is part of a task, and what comments and metadata are currently attached to it.

To view the properties of a file:

1. Select the check boxes next to the files whose properties you want to view.
2. Select **File > File Properties**.
3. The File Properties window will appear.

   Look in this window to find the properties you're most interested in.

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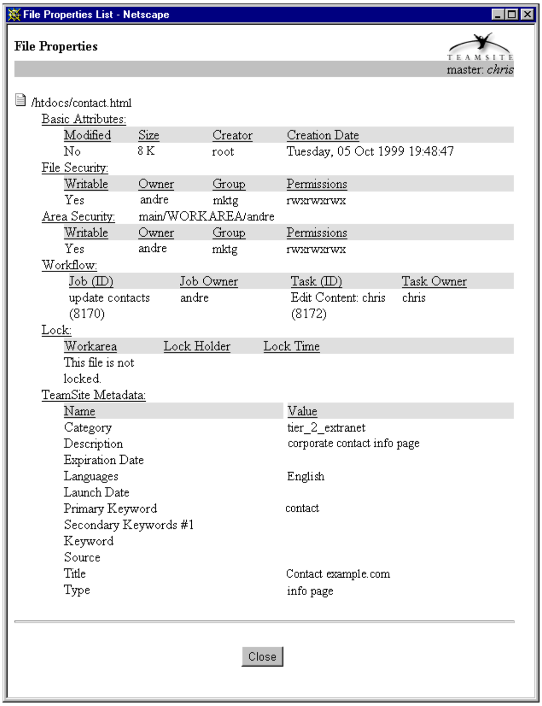


The File Properties window

About the File Properties Window

Basic

Modified	Tells whether the file has been modified in the current workarea
Size	Size of the file
Creator	Username of the creator of the file
Creation Date	Date the file was created

File Security

Writable	Tells whether you can write to the file
Permissions	Access permissions for the file in UNIX notation[1]
Owner	Owner of the file (according to UNIX permissions)
Group	Group which has access to the file (according to UNIX permissions)

1. In UNIX permissions, `r` stands for "read," `w` stands for "write" and `x` stands for "execute."The first three letters are the permissions for the owner of the file, the next three are the permissions for the group which has access to the file, and the last three are the permissions that the rest of the world has. For example, a file might have permissions which read `rwxrwxr--`, which means that the owner and everybody in the group can read, write, and execute the file, but everybody else can only read it.

Area Security

Writable	Tells whether you can edit files in the current workarea
Permissions	Access permissions for the workarea in UNIX notation
Owner	Owner of the workarea
Group	Group which has access to the workarea

Workflow

Job (ID)	Name and ID of the job (if any) associated with this file
Job Owner	Username of the owner of the job (if any) associated with this file
Task (ID)	Name and ID of the task (if any) associated with this file
Task Owner	Username of the owner of the task (if any) associated with this file

Lock

Workarea	Workarea (if any) in which the file is locked
Lock Holder	Username of the lock owner
Lock Time	Time the file was locked

Metadata

Metadata that has been set on this file. Metadata will vary from site to site and from file to file.

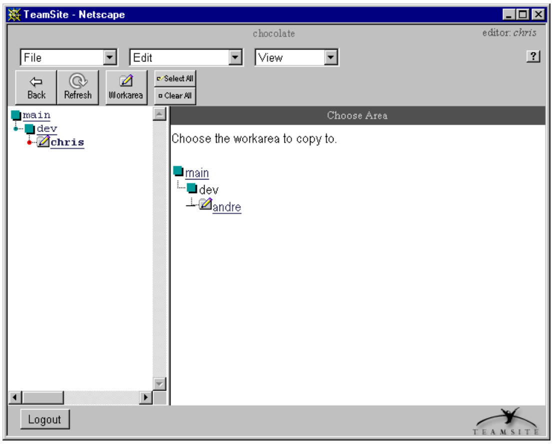
Copying Files to Other Areas

The Copy To Area command allows you to select a version of a file or directory in a workarea, staging area, or edition and copy it to the corresponding directory in another workarea. If this workarea already contains an older version of the same file or directory, it (and, for a directory, its contents) will be overwritten. The Copy To Area command will take both the file's name and its directory path into account when copying.

To cancel a Copy To Area operation, click the name of a directory or area in the Navigation Window at any step.

To copy a file or directory:

1. Navigate through the TeamSite file system until you have located the file or directory you want to copy.
2. Click the check box next to this item. If you do not select anything, TeamSite will assume that you want to copy the entire contents of your current directory.
3. Select **File > Copy To Area**.
4. A Choose Area window will appear. Using this window, navigate to the workarea you want to copy the item to. To find a workarea on another branch, click the name of the branch.



Choose Area window

5. Click the underlined name of the workarea. The item will be copied, and TeamSite will return you to the location you were copying from. The file will appear in the new location with a  (Modified) icon.

To learn what files the Copy To Area command has changed in your workarea, select **View > Update Log**. Click underlined entries in the Update Log window to see a list of the files that were updated in each operation (see page 45).

Copying Over Newer Files

If you use the Copy To Area command to overwrite more recent version than the one you want to copy, one of two things will happen:

- If the file has only been modified in the destination workarea, the message "'filename' is newer in workarea 'workareaname'" will appear, and the operation will fail.
- If the file has been modified in both the source area and the destination workarea, TeamSite will take you to the Conflicts screen. From there, you can choose to overwrite one version (see page 55) or to merge the two versions (see page 56).

TeamSite will not overwrite a newer version of a file with an older one unless specifically directed to do so. To overwrite a newer file, you must use the **Overwrite** button, as described below. Be careful when using this command, because it cannot be undone. If you use the **Overwrite** button to overwrite a directory, this operation is equivalent to deleting the directory from the destination area and then copying the directory from the source area. Any files that are in that directory in the destination area but which are not in the directory in the source area will be deleted from the destination area.

To copy over newer files:

1. Navigate through the TeamSite file system until you have located the files or directories you want to copy.
2. Click the check boxes next to these items.
3. Click the **Overwrite** button in the Button Bar. The **Overwrite** button will turn red.

4. Select **File > Copy To Area**.
5. A Choose Area window will appear. Using this window, navigate to the workarea you want to copy these items to.
6. Click the underlined name of the workarea. The files or directories you have selected will overwrite the corresponding files or directories in this workarea (directories will be copied with all their contents and all contents of the previously existing directory will be removed), and TeamSite will return you to the location you were copying from.

Restoring Deleted Files

If you have accidentally deleted a file in your workarea and want to restore it with a file from the staging area, an edition, or from another workarea, TeamSite will consider your deleted file to be more recently modified than the file you are trying to overwrite it with, and it will return a warning. You must therefore use the Overwrite command, as described above.

Comparing Files

You can compare a file or directory in any workarea, staging area, or edition to a corresponding file or directory in any other workarea, staging area, or edition. The Compare function checks corresponding files in each workarea, staging area, or edition and tells you which files have changed in one, the other, or both workareas, staging areas, or editions.

You can use this feature to see what items have changed between one edition and the next, how one person's workarea differs from another's, or whether there will be conflicts between a workarea and the staging area.

Using TeamSite File Comparison

You can compare individual files and directories, or you can compare the entire contents of workareas, staging areas, or editions. If you are comparing individual files or directories, you can only compare one file or directory at a time. If you are comparing directories, the entire contents of the directory you select (including subdirectories) will be compared.

To cancel the Compare operation, click the name of a directory or area in the Navigation Window at any step.

Comparing Individual Files or Directories

To compare individual files or directories in a workarea, staging area, or edition:

1. Navigate into the workarea, staging area, or edition containing the item that you want to compare. Find the first file or directory that you want to compare, and select its check box. If no item is selected, TeamSite will compare the entire current directory.
2. Select **File > Compare Any**.

3. TeamSite will ask you to select the workarea, staging area, or edition containing the file or directory that you want to compare the first item against. Using the Choose Area window (see page 50), navigate through the site until you have found the area containing this item. If the area is on another branch, click the branch's name to access its workareas, staging areas, editions, or sub-branches.

4. Click the name of the workarea, staging area, or edition. TeamSite will compare the first file or directory you selected with the corresponding file or directory in this location and display the results in the Compare Results window.

5. If files have only changed in one area, TeamSite will display the results immediately. If files have changed in both areas, TeamSite will ask you which set of results you want to view. You can switch from one set of results to another at any time by clicking the underlined text.

Comparing Entire Areas

To compare the entire contents of workareas, staging areas, or editions:

1. From the branch view, select **File > Compare Any**.

2. TeamSite will ask you to select the first area that you want to compare. Using the Choose Area window, navigate through the site until you have found the workarea, staging area, or edition that you want to compare.

3. Click the name of the area that you want to compare.

4. TeamSite will ask you to select the second area that you want to compare. Using the Choose Area window, navigate through the site until you have found the workarea, staging area, or edition. If the area is on another branch, click the branch's name to access its workareas, staging areas, editions, or sub-branches.

5. Click the name of the workarea, staging area, or edition. TeamSite will compare the first set of files you selected with the corresponding files in this location and display the results in the Compare Results window.

6. If files have only changed in one area, TeamSite will display the results immediately. If files have changed in both areas, TeamSite will bring up a Choose Results window where you may choose which set of results you want to view: changes that have been made in one area, changes that have been made in the other area, or conflicts where files have been changed in both areas. You may switch from one set of results to another at any time by clicking the underlined text.

Comparing Files with the Staging Area

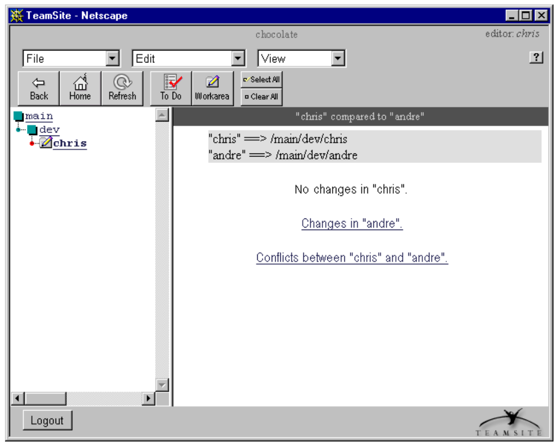
To compare files or directories in a workarea or edition with the staging area on that branch:

1. In the workarea or edition, find the file or directory that you want to compare, and select its check box. If no item is selected, TeamSite will compare the entire current directory.
2. Click the **Compare** button in the Button Bar.
3. TeamSite will automatically compare the first item you selected with the corresponding file or directory in the staging area on that branch and display the results in the Compare Results window.
4. If files have only changed in one area, TeamSite will display the results immediately. If files have changed in both areas, TeamSite will ask you which set of results you want to view. You may switch from one set of results to another at any time by clicking the underlined text.

Viewing the Results of Your Comparison

If files have changed in both areas, TeamSite will bring up a Choose Results window where you may choose which set of results you want to view: changes that have been made in one area, changes that have been made in the other area, or conflicts where files have been changed in both areas. You may switch from one set of results to another at any time by clicking the underlined text. Note that the sets of files are non-overlapping. That is, a link for changes in one area does not include the files that conflict with the other area.

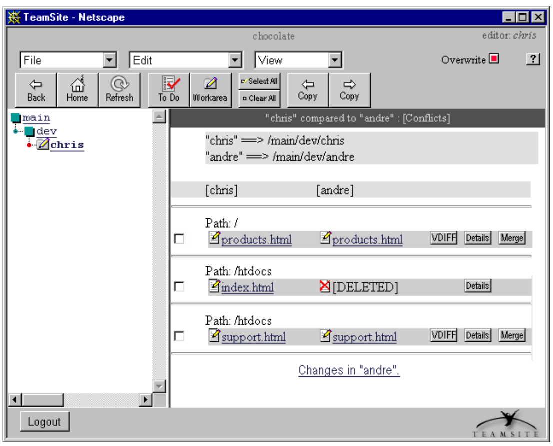
For example, the following screenshot shows the results of comparing workareas `andre` and `chris`. The Compare Results screen contains a line that says, `No changes in “chris.”` This means that there are no changes in `chris` other than those changes that conflict with `andre`.



Choose Results window

In the Compare Results window, unchanged files are marked with an (Unchanged) icon. Modified files or newer versions of a file are marked with a (Modified) icon or with one of the Modified icon variants, as appropriate (see “TeamSite Icon Reference”). Deleted files and directories are marked with a (Deleted) icon.

From the Compare Results window, you can see information about the two versions, such as modification date, user information, and version. You can display the two versions of a file side by side, either as it will be displayed in a browser window (see page 54), or as source code (see page 55). You can also copy files from one area that you are comparing into the other (see page 55), or merge the two versions (see page 56).



Compare Results window

Comparing File Details

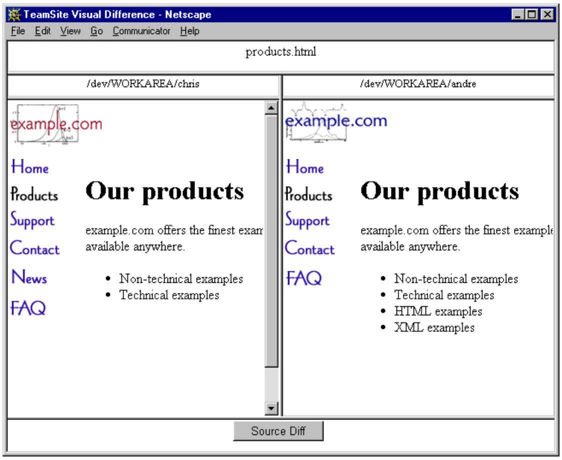
To see information such as modification date, user information, and version on two versions of a file that you have compared, click the Details button next to those files in the Compare Results window. A popup window will appear with the information for each version of the file.

Compare Details window

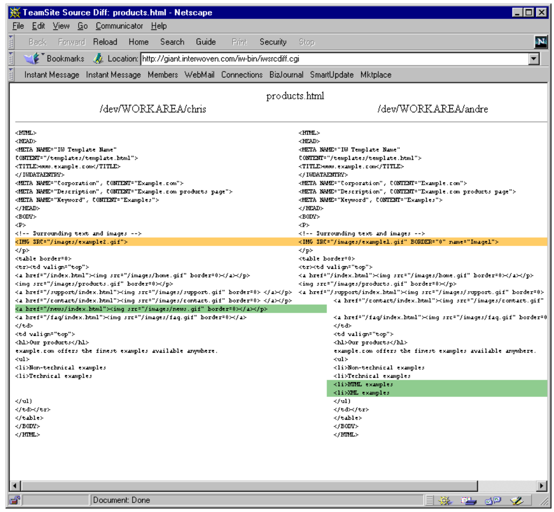
Visual Differencing

When you are comparing files in different workareas, staging areas, or editions, you can view corresponding files side by side, in the context of their respective versions of the Web site. Click the **VDIFF** button next to the pair of corresponding files you want to view in the Compare Results window. A Visual Difference window will appear, displaying the two versions side by side.

You can also use this function with SmartContext Editing: select **Advanced > File > Vdiff with Staging**, and a Visual Difference window will appear that displays the current version of the file side-by-side with the version in the staging area.



Visual Difference window



Source Difference window

Source Differencing

To view the HTML or text source of the two documents, click the **Source Diff** button in the Visual Difference window. A Source Diff window will appear, displaying the source of the two documents side by side. Changes will be highlighted in red. You can jump from one change to another using the buttons at the bottom of the screen. Source Differencing is only available for text files, and will not work for other formats such as graphics or sound files. You can also obtain Source Differences by clicking the **SDiff** button in the Compare window.

Copying Files From the Compare Results Window

To copy files from the Compare Results window:

1. Select the check boxes next to the files you want to update.
2. Click the 

(Copy Left) or the 

(Copy Right) button in the Button Bar.

If you click the Copy Left button, the selected files in the right-hand column will be copied over the files in the left-hand column. If you click the Copy Right button, the selected files in the left-hand column will be copied over the files in the right-hand column. The Copy Left and Copy Right buttons are only available when you are comparing one or more workareas.

If you want to copy older files over newer or conflicting versions, you will need to click the **Overwrite** button before clicking one of the **Copy** buttons. The **Overwrite** button is automatically turned on when you view the Conflicts section of the Compare Results window.

Merging Files

If two files are in conflict and you want to combine both sets of changes, you can use Interwoven Merge to reconcile them.

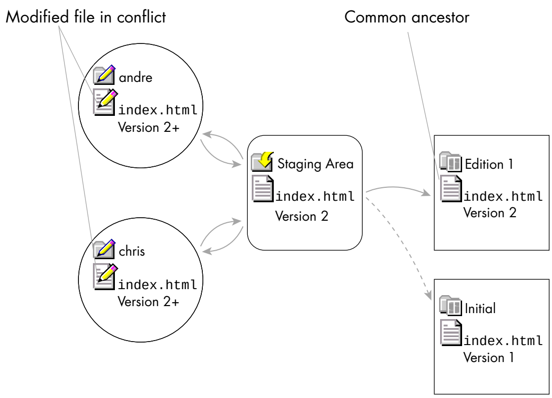
Merging is only available for text files, and will not work for other formats such as graphics or sound files.

About Interwoven Merge

Interwoven Merge compares each of the two conflicting file versions against their common ancestor, and is therefore able to determine which version contains a particular change. This allows Interwoven Merge to intelligently recommend which changes to incorporate into the merged file.

For example, Chris and Andre might both change the same file (`index.html`) in their own private workareas. The common ancestor of this file might reside in an earlier edition (`Edition_1`), as shown below.

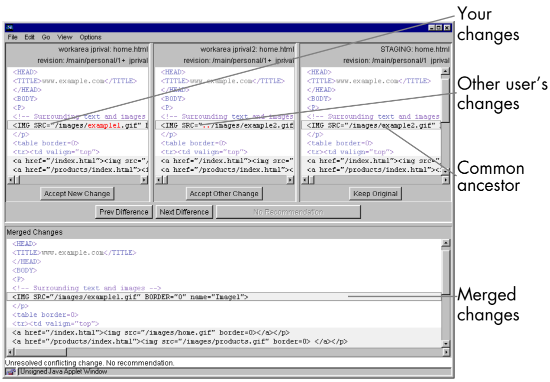
In this case, Interwoven Merge would check Version 2+ of `index.html` in both workareas against Version 2, which happens to be located in `Edition_1`. This way, Interwoven Merge can tell which lines in each new version have changed from the original version. If a line changed in Andre's version but not in Chris's, Interwoven Merge will recommend that you accept that change. And if a line changed in Chris's version but not in Andre's, Interwoven Merge will recommend that you accept that change, as well. However, if a line changes in both versions, then Interwoven Merge will ask you to reconcile the change.



Branch structure showing the version history of a file that has been modified in two workareas

Using Interwoven Merge

To use Interwoven Merge, click the **Merge** button next to the two files in the Compare Results window. The Interwoven Merge window will appear, showing the changes you have made, the changes another user has made, the common ancestor of the file, and the file that results from reconciling changes.

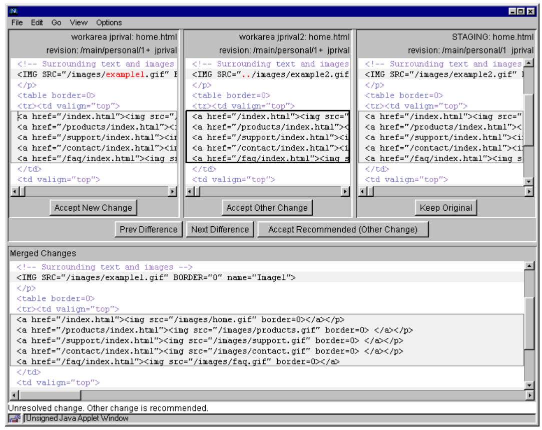


The Interwoven Merge window

You can also view a subset of these files by selecting any of the options in the **View** menu.

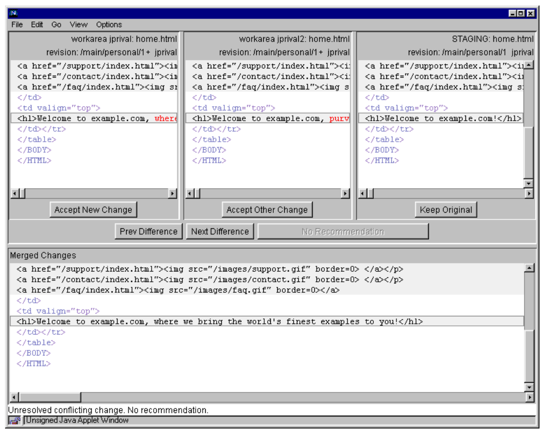
Differences found between the three versions will be highlighted in red. The lines containing the differences will be colored gray. You can use the **Next Difference** and **Prev Difference** buttons to jump from difference to difference, or you scroll through the files using the scroll bars.

If a line has been changed in only one version, when you select that difference it will be highlighted strongly, as shown below. The corresponding lines in the other versions of the file will be highlighted weakly:



The Merge window, showing a change made to a single file

If a line has been changed in both versions, when you select that difference the corresponding line will be highlighted weakly in all versions, as shown below:



The Merge window, showing changes made in both files

For each change, you have three choices:

- Click the **Accept New Change** button to keep the change you have made, discarding any changes that have been made to the corresponding line in the other version.
- Click the **Accept Other Change** button to keep the change that the other user made, discarding your own changes.
- Or, click the **Keep Original** button to discard the changes that both you and the other user made to the file.

The Merged Changes window will be updated to reflect your decisions. After you have chosen which change to keep, you can still go back and choose another option. You can also manually edit the file in the Merged Changes window.

Once you have resolved all the differences between the different versions of the file, you can save it and exit Interwoven Merge. To save your file and exit, select **File > Save and Exit**. The merged file will be saved in your workarea, and a backup copy of the original file will be placed in your workarea under the name `*filename*.original`.

Listing Modified Files

To view a list of all the files that have been modified in a workarea:

1. Go into the workarea.
2. Select **View > List Modified**. A list of all files that have been modified since the last time they were submitted will appear, including statistics such as size, modification date, and the username of the person who modified them.

To view a list of all the files that have been modified in multiple workareas:

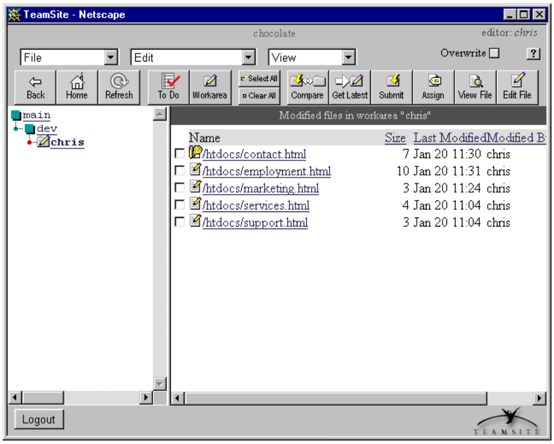
1. Go to a view of the branch containing these workareas.
2. Click the check boxes next to the workareas whose modified files you want to view.
3. Select **View > List Modified**. A list of all files in these workareas that have been modified since the last time they were submitted will appear, including statistics such as size, modification date, and the username of the person who modified them.

To view a list of all the files that have been modified on a branch:

1. Go to the branch view.
2. Select **View > List Modified**. A list of all files on the branch that have been modified since the last time they were submitted will

appear, including statistics such as size, modification date, and the username of the person who modified them.

Using this list, you can select files in order to view their histories (see page 61), lock or unlock them (see page 59), or submit them (see page 42).



List Modified Files window

Locking Files

TeamSite supports three different types of file locking: Submit Locking, Optional Write Locking, and Mandatory Write Locking. Ask your Branch Administrator which type you are using. Different branches on your Web site may use different types of locking. All workareas on a branch use the same type of locking.

In the browser interface, the TeamSite commands New File, Import File, Rename, and Edit all automatically lock the files they are operating on. Some tasks may also try to lock files.

When a file is locked, it is locked for a particular workarea. That is, all users who have access to that workarea can edit the file. In addition, all users who have previously modified the file can edit it in their workareas (but not lock it).

TeamSite may be configured to allow only the owner or creator of the lock to submit a locked file to the staging area (as opposed to allowing any member of the workarea where the file is locked). For more information on this option, and on locking and user permissions, see the *TeamSite Administration Guide*.

Submit Locking

Submit locking means that if a file is locked, only users within the workarea where it is locked may submit the file to the staging area. Users are still allowed to edit the file within the context of other workareas but may not submit it until the user who holds the lock has submitted his version or manually released the lock.

If a file is not locked, anyone with the appropriate permissions may submit it.

If someone else has the lock on a file that you are editing, and you try to submit a workarea or directory containing your version after the lock holder has submitted the file and released the lock, the Compare Results window will appear showing the conflicting versions of the file. From this window, you can choose to merge the two files, or to overwrite the version in the staging area with your own.

If someone else has locked a file, and you edit it through the TeamSite GUI, a warning will appear:

You can continue to edit the file, but you will have to merge your changes with those of the lock owner after he submits it.

Write Locking

Write locking means that a locked file may only be edited in the workarea where it is locked. Users in other workareas may not edit the same file even within the context of their own workareas, but they may view a read-only copy if they have the necessary permissions. Write locking may be optional, in which case the user may choose whether or not to lock the file that he edits, or mandatory, in which case a user cannot edit a file without locking it first. Under Mandatory Write Locking, all files in a workarea are read-only until a user locks them for editing. Once you've modified a file while holding a lock, you will be able to continue to modify the file even after releasing the lock. Once you submit the file, it will become read-only again.

If you edit an unlocked file, and somebody edits the file at the same time but in a different workarea, the second person to submit the file to the staging area will have a conflict and will need to either merge the two versions (see page 56), overwrite the version in the staging area with his own, or overwrite his own version with the version in the staging area (see page 50).

Locking and Unlocking Files

To lock files:

1. Click the check box next to the file or files that you want to lock in your workarea.
2. Select **Edit > Lock**.
3. A Lock window will appear. Type any comments you have in the comment box next to each item.
4. The Lock function will automatically compare the version in the workarea and the version in the staging area, and take the most recent. If you want to keep the version in your workarea, whether or not it is newer, deselect the **Get Latest** check box.
5. Click **OK**. TeamSite will lock the files.

To unlock files:

1. Click the check box next to the file or files that you want to edit in your workarea.
2. Select **Edit > Unlock**.

Viewing Locks

To list locks in your workarea:

1. Go into your workarea.
2. Select **View > List Locks**. A list of all files that have been locked in your workarea will appear.

To list locks in multiple workareas:

1. Navigate to the branch view of the branch containing the workareas.
2. Click the check boxes of the workareas in question. If you are in the branch view and you do not select any check boxes, TeamSite will display all the locks on that branch.
3. Select **View > List Locks**.

To list all locks on a branch:

1. Go to the branch view.
2. Select **View > List Locks**. A list of all locked files on the branch will appear.

A  (Key) or  (Modified Key) icon is displayed next to files that are locked in your current workarea.

A  (Locked) or  (Modified Locked) icon is displayed next to files that are locked in other workareas.

Locking Files and the Overwrite Button

If you click the **Overwrite** button and then try to lock a file, TeamSite will take the version of the file in the staging area regardless of whether or not it is newer than the version in your workarea, copy it into the workarea, and lock it (if the file is not already locked).

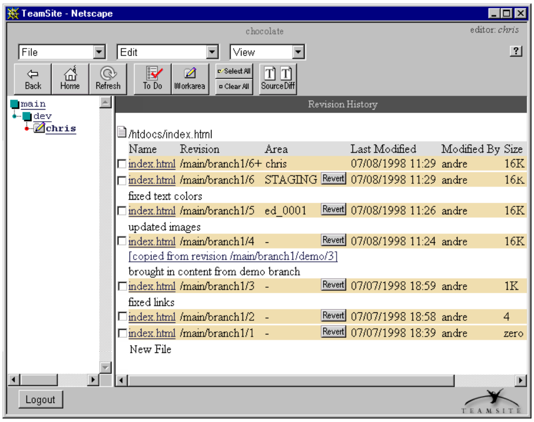
Viewing File Histories

TeamSite's History feature allows you to view any previous version of a file, along with such statistics as dates of modification and usernames of the people who modified the file. Further, it allows you to revert to any previous version of the file. History only displays versions that have been submitted to the staging area, and it does not display sibling versions of the file that may appear on other branches.

To view the modification history of a file or files:

1. Click the check boxes next to those files in your workarea.
2. Select **View > History**. A Version History window will appear, displaying statistics such as revision ID, the area that contains that version of the file, size, modification

date, comments that were attached at the time of submission, and the username of the person who submitted the files. For each file, the version at the top of the list is the version that currently appears in your workarea.



Version History window

The revision ID is unique for each version of a given file, and it has the format `branchpath/versionnumber`, where `branchpath` is the path to the branch (for example, `main/branch1`) and `versionnumber` is the number of the revision of the file on that branch. If you copy the file to another branch, it will have a different version number there. A + after the version number means that it is a version that has been modified in a workarea but not yet submitted to the staging area.

If this file has been copied from another branch, it will be noted in the entry for the version that was copied. You can click the link to see the revision history of the file on the other branch.

You can view older versions of files by clicking their underlined file names.

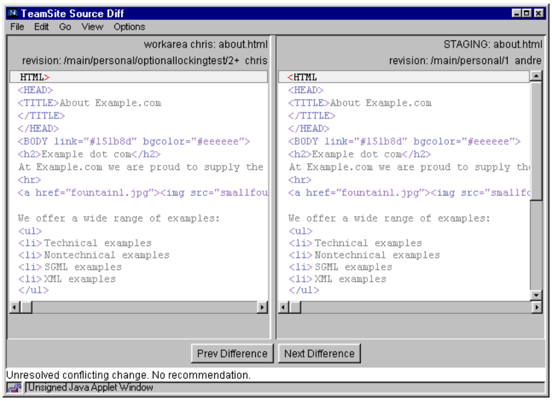
Comparing Versions

You can compare the source of any two versions of a text file, side by side, using Source Differencing.[1]

To compare two versions of a file:

1. In the History window, click the check boxes next to the two versions you want to compare.
2. Click the **Source Diff** button in the Button Bar.
3. The Source Differencing window will appear. You can jump from difference to difference by clicking the **Prev Difference** and **Next Difference** buttons.

1. Requires a browser that will support Interwoven Merge. See "Choosing a Browser" on page 16.



Version History Source Differencing window

Reverting to an Older Version

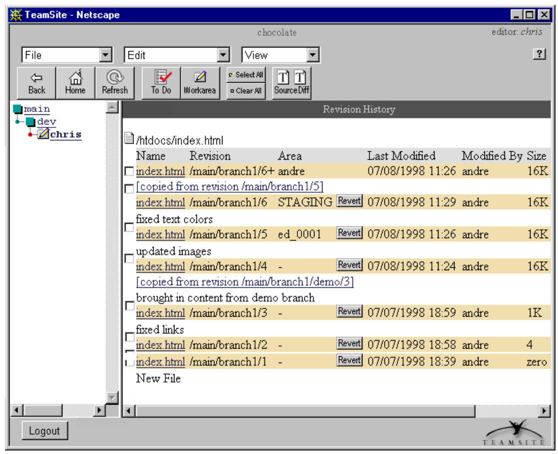
The Version History window will allow you to revert to any previous version of a file that appears in the window. This version will then appear at the top of the History list. This type of modification, like all modifications, does not become a permanent part of the file's history until it is submitted to the staging area. Therefore, you can revert to an older version and view it in the context of the current Web site, then go back to a newer version.

If you have a modified version of the file in your workarea and you revert it, the modification will be lost. Revert will overwrite the file, and you will only be able to go back to a version that has been submitted to the staging area.

To revert a file to an older version:

1. In the Version History window, click the **Revert** button next to the version you want to revert to. A confirmation dialog will appear.
2. Click **OK**.

TeamSite will return you to the Version History window, showing the change that you have made. The file in your workarea will be reverted to the selected version.



Reverted file in the Version History window

Marking Files and Directories Public or Private

By default, files in your workarea are public. That is, they can be submitted to the staging area, so that other users can access them when they update their workareas.[1] Private files are files in your workarea that are not made available to other workareas. They are ignored during all submissions to the staging area and when you use Copy To to copy files from your workarea to another location. However, private files may be overwritten if you copy files into your workarea or use the Get Latest command. To deliberately overwrite a private file, click the **Overwrite** button before a Copy To or Get Latest operation.

You can also mark a directory as private, and everything inside the directory will be treated as private when you are performing a Submit, Get Latest, Compare, or other operation on the directory. However, if you go inside the directory and perform these operations on the individual files and directories that it contains, they will not be treated as private unless they are specifically marked so.

For example, if you submit a directory that contains a private directory to the staging area, the private directory and all of its contents will not be submitted. However, if you go inside the private directory and submit any public files or directories, they will appear in the staging area with the same directory path that they have in the workarea.

1. You can only edit a file if you have permissions, whether the file is public or private.

To make a file or directory private:

1. Click the check boxes next to the files or directories that you want to make private in your workarea.
2. Select **Edit > Private**.

A  (Private File) icon appears next to each file that you have selected, signifying that the file is private.

A  (Private Directory) icon appears next to each directory that you have selected, signifying that the directory is private.

To make private files or directories public:

1. Click the check box next to the file or files that you want to edit in your workarea.
2. Select **Edit > Public**.

All files not marked with the  or  icons are public by default.

Autoprivate

Autoprivate may or may not be implemented on your system. Autoprivate automatically marks certain files in your workarea as private, so that they won't be propagated into the staging area and editions. Examples of files that Autoprivate may mark as private are: temporary files, backup files, and resource forks. Autoprivate is configured by your system administrator on a system-wide basis.

Deleting Files and Directories from the Staging Area

The staging area is read-only, so if you submit a file in error, you cannot delete it directly.

To delete a file from the staging area:

1. Delete the file from your workarea.
2. List modified files in that workarea (see page 58). The deleted file in your workarea will have a (Deleted File) icon.
3. From the list of modified files, select the deleted file. Click the **Submit** button in the Button Bar or select **File > Submit**.

To delete a directory from the staging area:

1. Delete the directory from your workarea.
2. List modified files in that workarea (see page 58). The deleted directory in your workarea will have a (Deleted File) icon.
3. From the list of modified files, select the deleted directory. Click the **Overwrite** button in the Button Bar, then click the **Submit** button or select **File > Submit**.

Metadata Capture

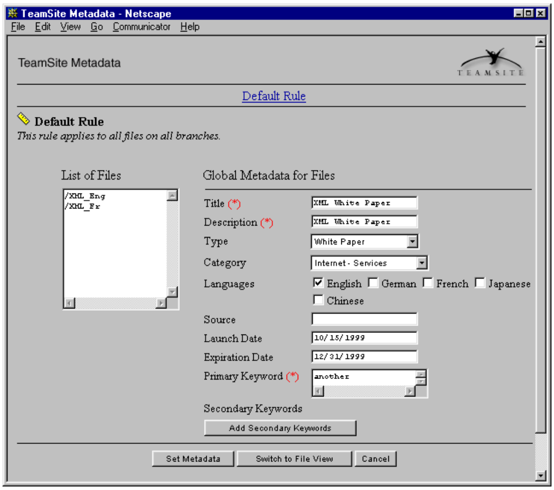
Metadata capture may or may not be implemented on your system.

You can set metadata on a file or set of files through the GUI. Different files may require different types of metadata to be set (this may be configured on an individual basis). Information about configuring rules for capturing metadata is available in *Administering TeamSite*.

You can also use the `iwextattr` command-line tool to set metadata (extended attributes).

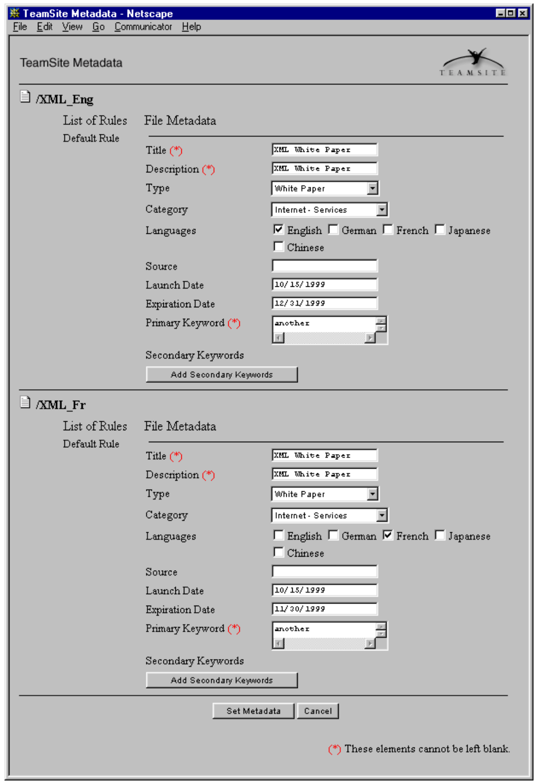
To set metadata through the GUI:

1. Select the check boxes next to the files you want to set metadata on, then select **File > Metadata**. The TeamSite Metadata window will appear.



Metadata Capture window—Rules view

2. The initial window that appears allows you to set metadata on all the selected files, according to the rules that have been configured for those files. All the files will have the same metadata.
3. To set different metadata on different files, click the **Switch to File View** button in the Button Bar. The Metadata File view will appear.



Metadata Capture window—File view

If you want to set similar metadata on a group of files, set the metadata in the Rules view, then switch to the File view to make any necessary changes in individual files' metadata.

4. When you are finished setting metadata, click **Set Metadata**.

Metadata Search

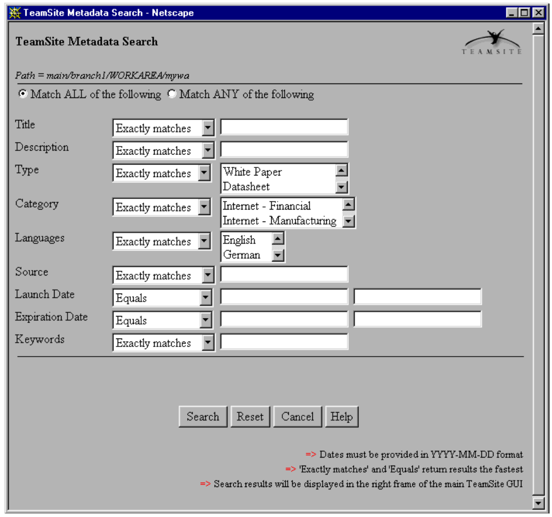
Metadata search may or may not be implemented on your system.

You can search for files based on metadata set for them. For instance, if a file's metadata categorizes it as a "Press Release" and associates the key words "July" and "Acquisition" with it, then a search based on any one or any combination of those values retrieves that file (provided that document type and keywords are configured as searchable attributes).[1] A metadata search must be conducted within a workarea and is recursive through the selected directory and its subdirectories. Text fields in search forms are case-sensitive.

To search metadata through the TeamSite GUI:

1. Within your workarea, navigate to the directory where you want to begin your search.
2. Select **View > Search Metadata** (located past the third separator in the menu).

   The TeamSite Metadata Search window appears in a new browser window.



TeamSite Metadata Search Window

3. Decide whether you want your search to match all or any of your criteria and select the appropriate radio button at the top of the TeamSite Metadata Search window.
4. Set the criteria for your search. You may set just one or several search criteria. Focus your search by selecting operators from the drop down menus. Also, remember that text fields are case-sensitive.

   Note that dates must be entered in YYYY-MM-DD format with dashes between year, month and day. Also, when you use the **Between** operator for a numerical range, you must enter a starting value in the first field and an ending value in the second. When you use operators other than **Between** you need only enter a value in the first field.

1. Note that some metadata attributes may be set by your administrator as non-searchable. Therefore, the fact that you can set a particular metadata attribute on a file does not necessarily mean you can search against that attribute.

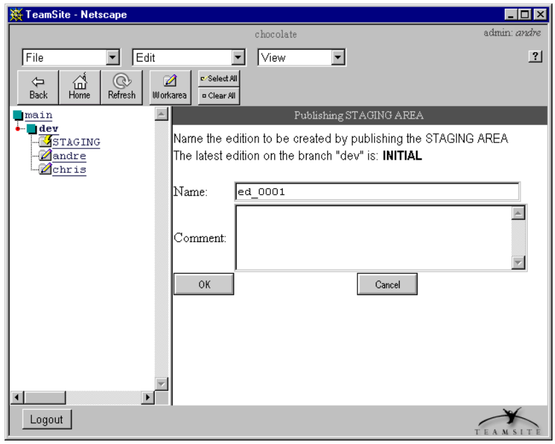
5. When you have set your criteria, click **Search**.

   The results display in the right frame of the main TeamSite GUI. Although the results display in order by file name, be aware that regardless of where you initiate your search the relative path from the workarea to the file is included in the file name. For example, a search hit that retrieves a file named `Zeus.html` in a directory named `Apollo` in a workarea named `Janus` displays the file as `/Apollo/Zeus.html` even if the search was initiated in `Apollo`.

Publishing Your Work

To create a new edition from the contents of the staging area:

1. Select **File** > **Publish** from anywhere within your branch. The Publish window will appear.
2. TeamSite will suggest a name for the new edition. If you want to give the edition a different name, enter the name of the new edition in the **Name** box in the Publish window.



Publish window

3. Enter any comments you have in the **Comments** box.
4. Click **OK**. The staging area will be published as a new edition.

To find out which files in an edition have changed from the previous edition, go into the edition and select **View** > **Submit Log**. You can also use the Compare function to find differences between editions.

Chapter 5

TeamSite Workflow

This chapter discusses the following TeamSite workflow features:

- Workflow Process Overview (page 69)
- Managing Tasks (page 70)
  - Viewing Your To Do List (page 70)
  - Viewing Task Details (page 70)
  - Performing Tasks (page 70)
  - Editing Task Files (page 71)
  - Adding Comments to Task Files (page 71)
  - Renaming Task Files (page 72)
  - Editing Tasks (page 72)
  - Adding and Removing Files from Tasks (page 72)
  - Adding Comments to Tasks (page 74)
  - Editing Task Descriptions (page 74)
  - Renaming Tasks (page 75)
  - Approving Tasks (page 75)
  - Completing Tasks (page 75)
  - Taking Ownership of Tasks (page 75)
  - Resolving Task Conflicts (page 76)
  - Comparing Tasks to the Staging Area (page 76)
- Managing Jobs (page 78)
  - Viewing Jobs (page 78)
  - Creating Jobs (page 78)
  - Viewing Job Details (page 79)

Workflow Process Overview

TeamSite workflow begins when a user creates a job, based on a *workflow template*. A workflow template describes a particular workflow model. For information about configuring workflow templates, consult *Administering TeamSite*.

The user who creates the job specifies the parameters of this job, such as the users who are to perform specific tasks, the workarea a task is to take place in, and the files associated with a task.

The users who are assigned specific tasks may be notified by email (if the workflow template is configured to do this) or by checking their To Do lists in the TeamSite GUI.

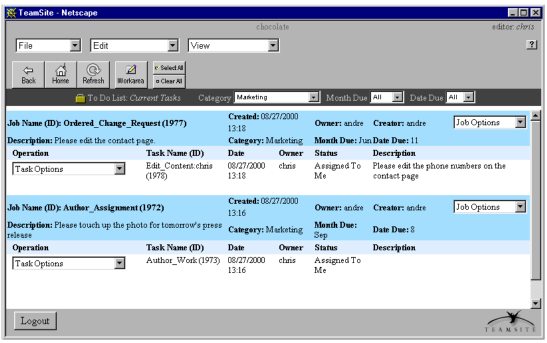
When users complete tasks, they send them to the next step of the workflow process by selecting a transition. If the task is a decision point within this workflow model, they may need to select from several possible transitions (for example, if the task is an approval task, they will need to decide whether to approve or reject the file).

When all the tasks in a job have finished, the job will no longer appear in the TeamSite GUI.

Managing Tasks

Viewing Your To Do List

To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. TeamSite will take you to the To Do list in the Workflow view and show you all the tasks and jobs that are assigned to you. You can filter your list by using the drop-down menus in the title bar.



A To Do list using filtering

The To Do List defaults to a maximum of 55 jobs per page. If you have more than 55 jobs, navigation buttons at the bottom of the screen allow you to view the other jobs.

The To Do list gives you two new menus: **Job Options** and **Task Options**. These menus allow you to get further information on tasks or jobs, edit the attributes of a job, perform tasks, edit tasks (see page 72), or complete tasks (see page 75).

Viewing Task Details

To view the Task Details window, select either **Start Task** or **Edit Task** from the **Task Options** menu.

TeamSite includes all custom **File** menu items in the **File Options** drop-down list for each file listed in the Task Details screen. These custom menu items are configured by your administrator during the installation process. Custom menu items for other menus (**Edit** and **View**) are not included in the Task Details screen.

Performing Tasks

TeamSite workflow includes many kinds of tasks. Tasks may require you to add files to the task, edit files or set metadata, or they may be performed by external programs that require no user input. Some tasks may require review and approval or rejection (these tasks are often marked as read-only).

To perform a task, select **Task Options > Start Task**. If the task involves file operations such as editing or adding files, or task operations such as approving files, the Task Files window will appear. Do these things as described elsewhere in this manual (see page 71 for information on editing files, page 72 for information on adding files, and page 75 for information on approving tasks). When you are finished, you will need to complete the task (see page 75).

Tasks performed by external programs often do not require user input, and may run invisibly to the user. Some automated tasks may require user input, in which case a separate form will appear when needed for data entry. When you select **Task Options > Start Task**, the task window will appear. Enter information as it directs you.

Editing Task Files

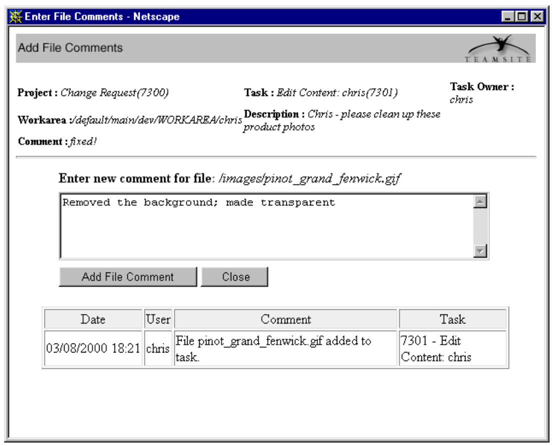
To edit a file in a task, go to the Task Details page (select **Task Options > Start Task** from your To Do list). Locate the file you want to edit, and select **File Options > Edit File/Data Record**. Edit the file as described in “Editing Files” on page 35.

Adding Comments to Task Files

At any point in a task, you can add information in the form of comments on the files contained in the task. These comments may convey information to other users involved with the job (for example, content contributors or approvers).

To add a comment to a task file:

1. Go to the Task Details page (select **Task Options > Edit Task** from your To Do list).
2. Locate the file you want to add the comment to. Select **File Options > Edit Comment**.
3. The File Comments page will appear, containing a list of the task’s existing comments at the bottom of the page, and a text box at the top of the page. Enter your comments in the text box and click **Add File Comment**.
4. You will be returned to the File Comments page, where you can enter another comment. To exit this page, click the **Close** button.



The File Comments page

Renaming Task Files

To rename a file in one of your tasks:

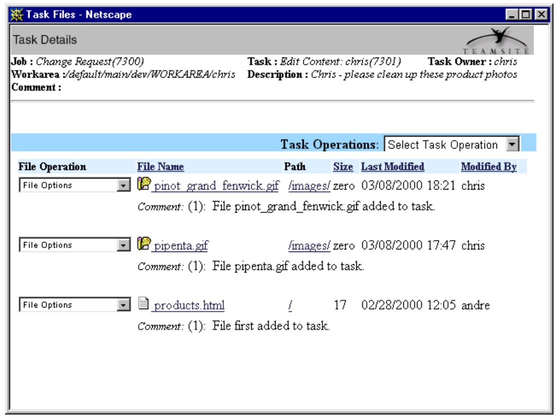
1. Go to the Task Details page (select **Task Options > Edit Task** from your To Do list).
2. Locate the file whose name you want to change. Select **File Options > Rename**.
3. A dialog box will appear. Type the new name into the space provided. Click **OK**.

   The file will appear in the Task Details page with the new name. A deleted file with the old name will also appear in the Task Details page, for future submission to the staging area.

Editing Tasks

To view task information or edit tasks:

1. Go to your To Do list and locate the task you want to view.
2. Select **Task Options > Edit Task**. The Task Details window will appear.



The Task Details window

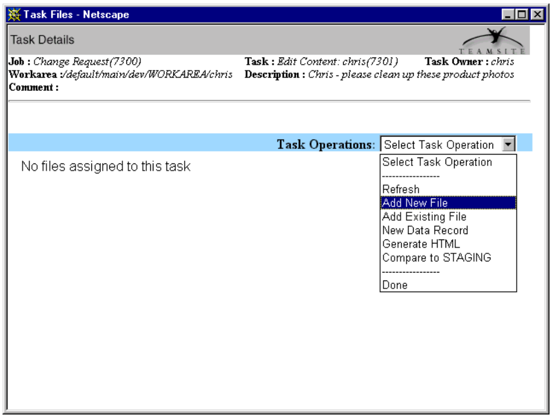
In this window, you can perform file operations and task operations. File operations include editing task files, removing task files, and adding comments to task files. Task operations include adding and removing files from tasks, adding comments to tasks, completing tasks, and comparing task files to the staging area.

Adding and Removing Files from Tasks

Adding a New File to a Task

To add a new file to a task:

1. In your To Do list, select **Task Options > Edit Task**.
2. The Task Details window will appear. Select **Task Operation > Add New File**.



Adding new files to a task

3. A New File window will appear. Enter the name of the new file, and if necessary, navigate to the directory where you want to put the file. Select the type of template you want to use (if you do not want to use a template, make sure Plain File is selected), and select the specific template you want to use.[1] Click **OK**.

4. The file will be added to the task, and it will open in your editing application.

   This file will not be visible in the Task Details window until you select **Task Operation > Refresh**.

Adding Existing Files to a Task

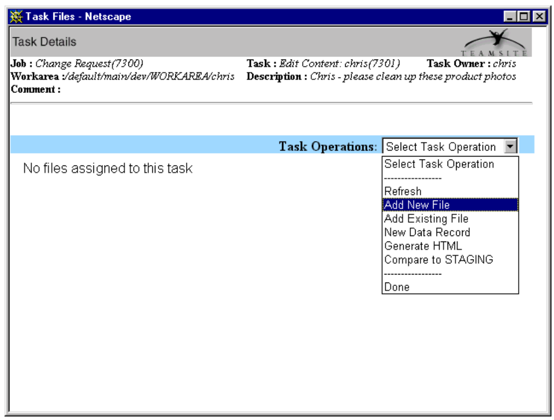
To add existing files to a task:

1. In your To Do list, select **Task Options > Edit Task**.

2. The Task Details window will appear. Select **Task Operation > Add Existing File**.

3. The Add Files to Task window will appear. Use the left-hand pane to locate the file or files you want to add to the task. When you have located them, check the check boxes next to them and click **Add Files to List**. They will appear in the right-hand pane.

   If you add files to the list in error, click the check boxes next to the files you want to remove in the right-hand pane and click **Remove Files from List**.



The Add Files to Task window

1. The templates you select through the New File window are not TeamSite Templating templates. For more information about New File templates, see page 99. For more information about TeamSite Templating, consult *Using and Configuring TeamSite Templating*.

4. When the list in the right-hand pane contains all the files you want to add to the task, click **Add Listed Files to Task**. The files will be added to the task.

Removing Files from Tasks

To remove files from a task:

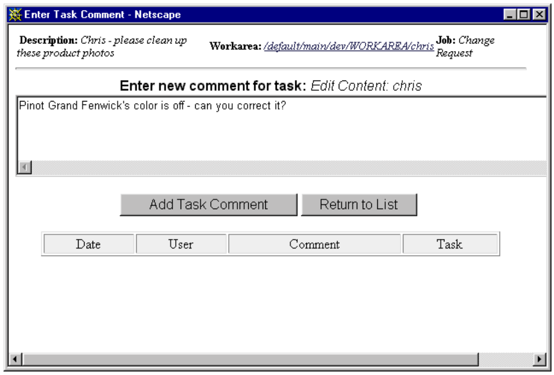
1. In your To Do list, select **Task Options > Edit Task**.
2. The Task Details window will appear. Locate the file you want to remove, and select **File Operation > Remove From Task**.
3. A confirmation box will appear; click **OK**.
4. The file will be removed from the task.

Adding Comments to Tasks

At any point in a task, you can add information in the form of comments. These comments may convey information to other users involved with the job (for example, content contributors or approvers).

To add a comment to a task:

1. Go into your To Do list (click the **To Do** button in the Button Bar).
2. Locate the task you want to add the comment to. Select **Task Options > Add Task Comment**.
3. The Task Comments page will appear, containing a list of the task's existing comments at the bottom of the page, and a text box at the top of the page. Enter your comments in the text box and click **Add Task Comment**.



The Add Comments page

4. You will be returned to the Task Comments page, where you can enter another comment. To exit this page, click the **Return to List** button.

Editing Task Descriptions

To change the task description that appears in your To Do list:

1. Go to your To Do list (click the **To Do** button in the Button Bar).
2. Locate the task whose description you want to change. Select **Task Options > Change Description**.

3. A dialog box will appear. Type the new description into the space provided. Click **OK**.

   The new task description will appear in your To Do list.

Renaming Tasks

To rename a task that appears in your To Do list:

1. Go to your To Do list (click the **To Do** button in the Button Bar).
2. Locate the task whose name you want to change. Select **Task Options > Rename**.
3. A dialog box will appear. Type the new name into the space provided. Click **OK**.

   The new task name will appear in your To Do list.

Approving Tasks

Approval tasks require you to review the files, and then approve or reject them. To approve or reject the task, select the appropriate successor option (see “Completing Tasks” on page 75). Confirmation of your choice will appear in the TeamSite window.

Completing Tasks

When you have completed a task, you need to select a transition to move the job along the workflow process.

To select a transition:

1. Go to the Task Details page (select **Task Options > Edit Task** from your To Do list).
2. Select the **Task Operation** menu. All possible task transitions will appear at the bottom of the menu. These transitions will vary from task to task (for example, **Approve**, **Reject**, **Done**).
3. Select a transition.

The job will now move on to the next task. The task will appear in your To Do list with an updated status.

Some tasks may be retrieved after you have selected a transition (this is only possible if the next task has not been activated). If you want to take a task back, go to your To Do list and select **Task Options > Take back task** (if available). If this menu option is not available, then this task cannot be retrieved.

Taking Ownership of Tasks

You can only take ownership of group tasks, which are created without a specific owner. These tasks will say `<no user>` in the Owner column of the Job History window.

To take ownership of a task:

1. Go to your To Do list (click the **To Do** button in the Button Bar). Select **View > Unassigned Tasks**.
2. Locate the task you want to own. Select **Task Options > Take Ownership of Task**.
3. The task will now appear in your To Do list.

Resolving Task Conflicts

If, during the course of a workflow operation, you create conflicts[1] in a file or files, and a task tries to submit the conflicting files to the staging area, you will be taken to the Compare Tasks page to resolve the conflict (see page 76).

You can resolve the conflict by merging the two versions of the file (see page 77), by overwriting the version in the staging area (see below), or by overwriting your version with the one in the staging area.

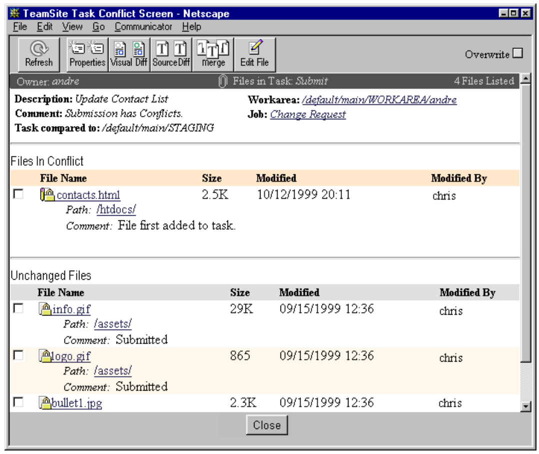
To overwrite the version in the staging area with your own version, select the check box next to the file, click the **Overwrite** button, then click **Submit**.

To overwrite your version with the version in the staging area, select the check box next to the file, click the **Overwrite** button, then click the **Copy** button.

1. See “Comparing Files” on page 51.

Comparing Tasks to the Staging Area

To compare the files in a task to the versions of those files contained in the staging area, go into the Task Details window and select **Task Operation > Compare to Staging**.



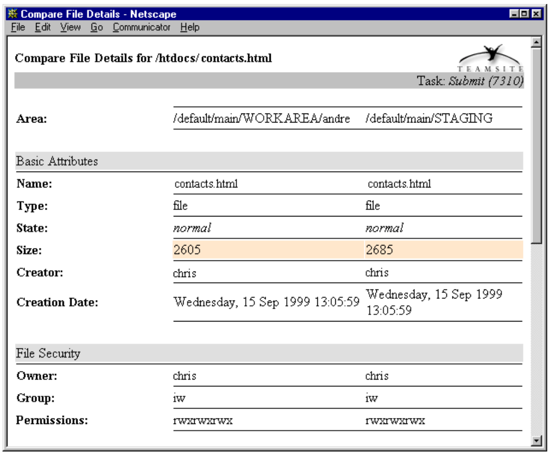
The Compare Tasks page

The Compare Tasks page allows you to see the differences between two versions of a set of files (in this case, the version of the files in the task, and the version of the files in the staging area). You can view the differences in the file properties and metadata, you can view the two versions of a page side by side, or you can view the source of two files side by side (available only for text files). You can also merge the two versions of the files (available only for text files).

File Properties and Metadata

To view the properties of two versions of a file, side by side:

1. Select the check box next to the file in the Compare Tasks page.
2. Click the **Properties** button in the Button Bar.
3. The Compare File Details page will appear, showing you information such as name, type, size, permissions, status, extended attributes, and metadata side by side.



The Compare File Details page

Visual Differencing

To use the Visual Difference feature with the files in your task, select the check box next to a file in the Compare Tasks page, then click the **Visual Diff** button in the Button Bar. For more information about Visual Differencing, see page 54.

Source Differencing

You can view the differences between the source of any two files. To use the Source Difference feature with the files in your task, select the check box next to a file in the Compare Tasks page, then click the **Source Diff** button in the Button Bar. For more information about Source Differencing, see page 55.

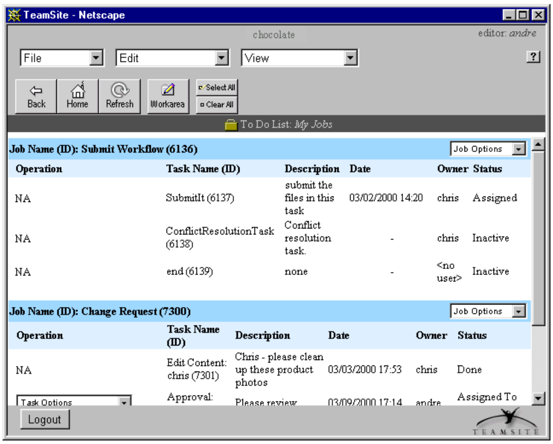
Merging Files

If you have been brought to the Compare Tasks page because you need to resolve a conflict in a task, and you want to merge the two files, click the check box next to the file, then click the **Merge** button in the Button Bar. For more information about merging files, see page 56.

Managing Jobs

Viewing Jobs

To view all the jobs that you have created, select **View > My Jobs**. The TeamSite window will display all the jobs you own, with information about the tasks contained in each job.



The Jobs window

A general outline of future tasks will be shown. However, this outline is subject to change, as some workflow models permit different paths to be taken through a job.

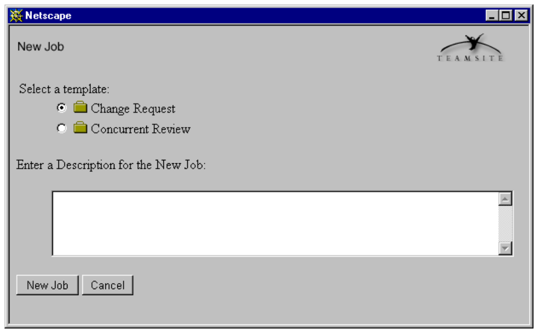
You can also view all jobs currently active in the system; to do this, select **View > All Jobs**.

Creating Jobs

To create a new job:

1. Select **File > New Job**. A new window will appear, asking you to select the workflow template you want to base the job on.

   The workflow templates that appear in this window are the templates that have been configured for your system. They may therefore differ from the example shown.



The New Job window

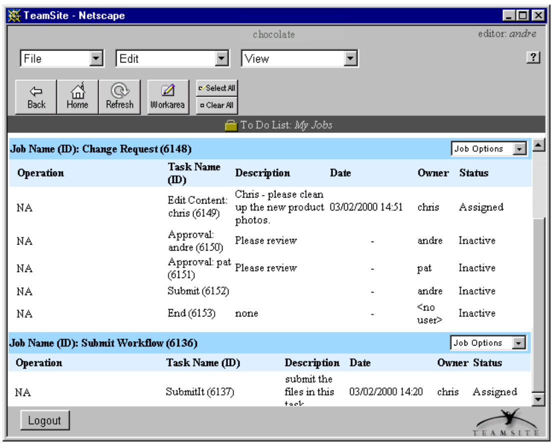
2. Select the radio button next to the workflow template you want to use, and enter descriptive comments in the text boxes. Click **New Job**.

3. A Job Template window will appear (this window will look different for different workflow templates). Enter the parameters of the new job in this window. The required parameters may differ for each workflow template. Click **Create Job**.

If you have not entered data in required fields, or if you have entered invalid data, the fields that require your attention will be highlighted. Correct the data and click **Create Job** again.

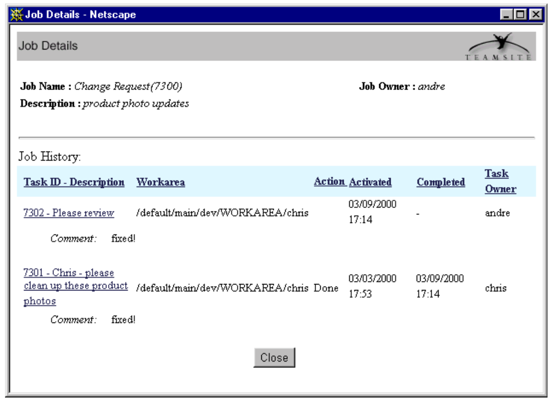
Viewing Job Details

To view the tasks contained in a job you own, select **View > My Jobs**. All the previous and current tasks will appear, with their status indicated. Note that this outline is subject to change, as some workflow models permit different paths to be taken through a job.



A "My Jobs" view

You can get more information about a job by selecting **Job Options > Job Details**.



Job Details window

The Job Details window shows the job owner, name, description, and past tasks. To view information about a particular task, click its name in this window. The Task Details window will appear (see page 72).

Chapter 6

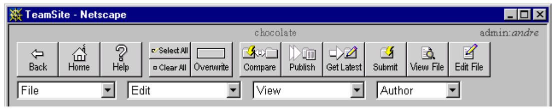
Administrator Features

An Administrator can perform all the functions of an Author or an Editor. In addition, an Administrator can create and delete new branches, sub-branches, and workareas. An Administrator also determines the type of locking being used on a branch, can compress and uncompress old editions, and can view custom reports of user activities.

- The Tool Bar (page 81)
- Creating Branches (page 81)
- Creating Workareas (page 82)
- Deleting Workareas, Branches, and Editions (page 83)
- Viewing Reports (page 83)

The Tool Bar

The Administrator’s Tool Bar contains all the functions that an Editor has access to, in addition to some more advanced branch management functions. The Tool Bar consists of a Button Bar, containing the most frequently used commands, and a Menu Bar, which displays drop-down menus containing all the commands. Various commands are displayed at different times according to when you can use them.



The Administrator’s Tool Bar

The Menu Bar contains three drop-down menus: **File**, **Edit**, and **View**. Each menu is displayed only when you can use at least one of the commands that it contains. Individual commands within the menus are displayed only when you can use them.

Creating Branches

When you create a branch, you can choose to base it on any edition of another branch.

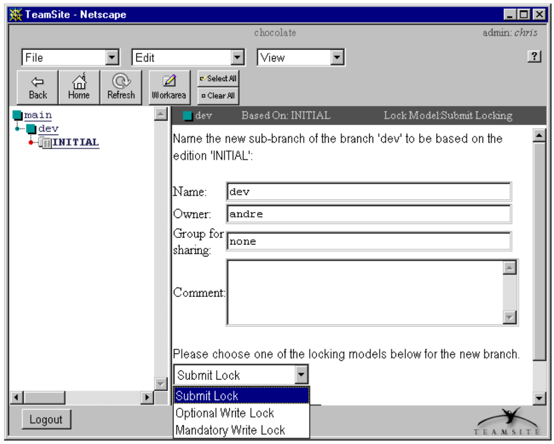
To create a branch:

1. Select **File > New Branch**.
2. You will be asked what edition you want to base the new branch on. Click the name of the edition you want to use as a starting point.

3. A Create Branch window will appear.
4. Enter the name of the branch in the Name box. Do not use spaces or the following characters in the branch name:

   \ / : * ? " < > |
5. Your username will appear in the Owner box. If you want to assign the branch to someone else, enter the owner's name in this box.
6. If you want this branch to have multiple Administrators, enter the name of the group who will be able to administer this branch in the Group for Sharing box.
7. Use the pull-down menu to select the type of locking you want to be used on this branch (see page 59 for an explanation of the different types of locking).
8. Add any comments in the Comment box.
9. Click **OK**.

Your newly created branch will contain no workareas, a staging area, and an edition called INITIAL, which will be a copy of the edition you used as a starting point.



Create Branch window

Creating Workareas

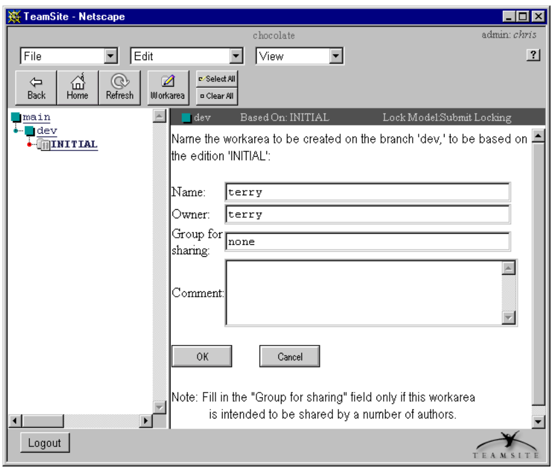
To create a workarea:

1. Select **File > New Workarea**.
2. If there are multiple editions on the branch, TeamSite will ask you what edition you want to base the new workarea on. Click the name of the edition you want to use as a starting point.
3. The Create Workarea window will appear. Enter the name you want to give the workarea in the Name box. Do not use spaces or the following characters in the workarea name:

   \ / : * ? " < > |
4. Enter the username of the workarea's owner in the Owner box.

5. If you want a group to be able to share this workarea, enter the name of the group in the Group for Sharing box. If you want this workarea to be private, so that only the owner can modify files in it, type `none` in the Group for Sharing box.
6. Add any comments in the Comments box.
7. Click **OK**.

If you want this workarea to have the most recent content, you will need to use Get Latest on the entire workarea, because changes may have been made to the staging area since the edition you selected in Step 2 was published. If you want to work on the older version of the Web site content, do not use Get Latest.



Create Workarea window

Deleting Workareas, Branches, and Editions

To delete a workarea, branch, or edition:

1. In the branch view, click the check box next to the item you want to delete.
2. Select **File > Delete**.
3. A confirmation window will appear. Click **OK**.

The workarea, branch, or edition will be deleted together with all its contents. Deleting a branch will delete all editions, workareas, and subordinate branches contained in that branch. In addition, deleting a branch or edition will delete all versions of a file that are contained within that branch or edition.

When you delete an edition, all Submit Log entries will be transferred to the next most recent edition. If the edition you have deleted is the newest one, the Submit Log entries will be transferred to the staging area.

Viewing Reports

TeamSite's Global Report Center lets you view reports of most common user activities in any TeamSite area or branch. You can select from three quick reports, or you can generate a custom report.

Quick Reports

The three quick reports show lists of all files submitted, deleted, or created on the entire TeamSite server for today's date.

To generate a report of all files submitted, deleted, or added today:

1. Select **View > Reports**.
2. The Event Reporting window will appear. Select one of: **Today's Submissions**, **Today's Deletions**, or **Today's Additions** from the **Quick Reports** pull-down menu.
3. Click the **Go!** button.
4. Your report will appear in the Event Reporting window.

Custom Reports

Custom reports allow you to specify the type of event to report on, the area affected, the users involved, and the timespan for the events covered by the report, and the order in which you want this data sorted.

To generate a custom report:

1. In the **Custom Report** section of the Event Reporting window, select the type of report you want (**Submit**, **Workflow**, or **General**).
2. From the **Event Condition** pull-down menu, select the event you want to report on. Different events appear according to which type of custom report you have selected:

Submit	General
Add	Create Branch
ForceAdd	Delete Branch
Modify	Create Workarea
ForceModify	Delete Workarea
Delete	Compress Edition
ForceDelete	Uncompress Edition
All	Publish Staging Area
	Reset Config
	All

3. In the **Version Path** box, type the vpath (version path) of the file, directory, or TeamSite area you want to be included in the report. If you do not specify a vpath, it will default to your current location within TeamSite. For information on vpaths, see the *Command-Line Tool Reference*.
4. In the **User(s)** box, type the usernames of the users whose activities you want the report to cover. Separate usernames by commas. For example:

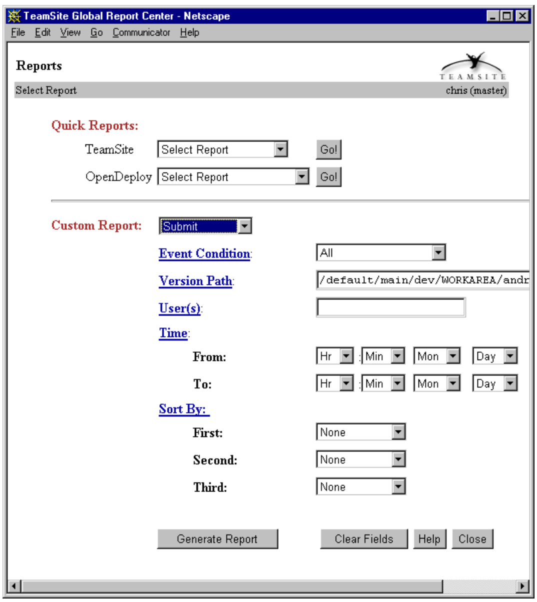
   `andre,chris,pat`

   If you do not specify a username, it will default to all users.

5. In the **Time** section, use the drop-down menus to select the start and end times for the time period to be covered by the report. If you do not specify a time, it will default to the entire time since TeamSite was installed.

6. Select the sort order for your results. You can sort by time, user, and version path.

7. Click **Generate Report**. Your report will appear in the Event Reporting window. You can re-sort your results by clicking on the underlined **Time**, **User**, or **Version Path** headings.



The Event Reporting window

Appendix A

TeamSite Icon Reference

TeamSite Areas

 Backing Store

 Branch

 Workarea

 Staging Area

 Edition

Files and Directories in TeamSite

 File

 Directory

 Deleted File or Directory

 Modified File

 Locked File (locked by you) (see page 60)

 Modified Locked File

 Locked File (not available to you) (see page 60)

 Modified Locked File

 Private File (see page 64)

 Private Directory (see page 64)

 Symbolic Link

Appendix B

Internationalization

This appendix contains the following information:

- An overview of TeamSite multibyte character support.
- Supported client platforms and browsers, server locales, GUI elements, and content.
- Information about UTF-8.
- General recommendations and information regarding specifying the encoding of web assets and the browser behavior when interpreting encoding.
- Information about file encoding relative to your text editor.
- Usage scenarios including a couple specific to Netscape Navigator.

Overview

TeamSite is engineered with your global enterprise in mind. This includes updating the TeamSite server to support multi-byte languages and locales at the operating system, client, and data management levels.

Internationalized TeamSite supports the following needs:

- International user data—Enables users to enter data, content, and field values in English, Traditional Chinese, Simplified Chinese, French, German, and Japanese.
- Localized operating system—The TeamSite server runs on any one of the following localized operating systems: English, French, German, and Japanese (one locale per instance of `iwserver`).
- Localized user interface—The WebDesk interface has been localized in French, German and Japanese.
- Localized file names—You are no longer restricted to file and directory names in ASCII character encoding. File, directory, branch, workarea, and edition names can have Japanese names on Japanese servers, German names on German servers, and French names on French servers.
- Continued support for processing of non-English Metadata and Templating content (first introduced in TeamSite 4.2.1 and 4.5.1).

What's Supported?

The following sections describe the supported client platforms and browsers, server locales, GUI elements, and content.

Client Platforms and Browsers

TeamSite supports the following client platforms:

- Windows 98 (US English, French, German, Japanese)
- Windows NT (US English, French, German, Japanese)
- Windows 2000 (US English, French, German, Japanese)
- Solaris 2.6, 2.7, and 2.8 US English
- MacOS 9.x (US English, Japanese)

TeamSite supports the following browsers:

- Internet Explorer 5.x , 6.0
- Netscape 4.76 through 5.x (Netscape 6 is not supported, Netscape is not supported on MacOS 9.x)

Note: Refer to the table on page 16 for additional information about browser compatibility.

Server Locales

The following table describes the supported TeamSite server locales:

Language	Server Locale Supported
Japanese	`ja_JP.PCK` and `ja` (also known as `ja_JP.EUC-JP`)
German	`de`
French	`fr`
English	`C` (C locale)

The client connecting to the TeamSite server must use the same language (they can be different locales of the same language) as the server. For example, running WebDesk on French Windows 98 connected to a Solaris 2.7 TeamSite server running in the French Latin 1 locale (`fr`) is supported. However, if that same French Windows 98 client logged into a Windows 2000 Japanese TeamSite server, and added files with names containing French characters, those files would not be supported by the TeamSite server due to limitations with the native operating system and handling of characters outside of its code pages.

Note: If you have any questions about your server locale or language support, contact your TeamSite administrator.

What's Been Translated?

The following TeamSite 5.5.2 features have been translated into French, German, and Japanese:

- TeamSite login screen
- WebDesk user interface and online help
- WebDesk submit workflow
- Visual Format
- LaunchPad
- SmartContext Editing (SCE)
- The following printed documentation (including PDF versions on TeamSite CD-ROM):
  - *TeamSite Author's Guide*
  - *TeamSite User's Guide*

What's Not Been Translated?

The following TeamSite 5.5.2 features are available in English only:

- WebDesk Pro user interface and online help
- Metadata capture form
- The remainder of the printed documentation and Release Notes

WebDesk Pro Elements

WebDesk Pro elements, including buttons and drop down menus, retain English names but may look slightly different because all HTML pages of our browser-based GUI are UTF-8 encoded, even for US English installations. Your client browsers may therefore choose different fonts to render UTF-8 encoded HTML pages.

Configuring Netscape for Multibyte Characters

Complete the following procedure if you are using a Netscape browser to display multibyte characters:

1. Open your Netscape browser.
2. Select **Edit** > **Preferences** to display the Preferences dialog box.
3. Click **Appearance** > **Fonts** to display the Fonts settings.
4. Set the **For the Encoding** field to Unicode.
5. Set the **Variable Width Font** field to a font that supports the language you want to use.
6. Set the **Fixed Width Font** field to a font that supports the language you want to use.
7. Click the **Use my default fonts, overriding document-specified fonts** option.
8. Click **OK**.

If this procedure does not deliver the expected results (that is, certain characters are not displayed properly), try the following procedure:

1. Select **View** > **Character Set** > **Set Default Character Set**.
2. Select **View** > **Character Set** > **Unicode (UTF-8)**.

Content

TeamSite supports non-ASCII characters in branch, area, directory, `vpath`, and file names in addition to the contents of a file.

Accessing the Localized Interface

To display the localized (French, German, or Japanese) WebDesk interface, you must change your browser's language settings to the appropriate language.

To display the localized (French, German, or Japanese) LaunchPad and Java Templating interfaces, your client operating system must be in the same locale as the interface you want to display.

About UTF-8

UTF-8 is the 8-bit encoding format for Unicode. Unicode is a system for exchanging, processing, and displaying diverse written languages. Unicode supports the principal written languages of the world as well as many classical languages.

Specifying File Encoding

All browsers rely on default settings to "guess" the encoding of pages whose encoding is not explicitly declared. If the browser's default setting is different than that of the actual encoding of the page passed to the browser, the browser may render the page incorrectly. Therefore, the best practice is for your web pages to always declare their encoding. This prevents your browser from guessing incorrectly when you use TeamSite, and ensures that your Web site viewers' browsers will not have to guess which encoding they should use.

For HTML documents, SmartContext Editing (SCE) honors the encoding specified by the `charset` parameter in either a `Content-Type HTTP` header or in an HTML `META` tag. For example:

- `Content-Type: text/plain; charset=UTF-8`
- `<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">`

To display multibyte characters in non-HTML text documents in SCE with the desired character encoding, the content web server must be configured to return a `Content-`

`Type HTTP` header that specifies the encoding, for example:

```
Content-Type: text/plain;
charset=UTF-8
```

If the `charset` is not specified—either by the content web server's `Content-type HTTP` header, or by the `charset` tag within the file—SCE assumes that the document is encoded in `ISO-8859-1`, which may cause the document to be displayed with "garbage" characters.

For additional information, consult the *TeamSite Administration Guide*.

Text Editor Encodings

Both emacs and vi derive their encoding from the locale of their active process. They cannot save files or render text in UTF-8 encoding.

Usage Scenarios

The following examples illustrate some of the advantages of using TeamSite in a global enterprise. Note that a branch scenario could also apply to a workarea, directory, or file operation (for example, New Branch, New Workarea, and Import File). They can also be applied to other locales (French or German).

Scenario 1

1. The TeamSite server is running in the `ja_JP.PCK` (Shift-JIS) locale on Solaris 2.7.
2. You create a branch with a Japanese name using WebDesk Pro running on Japanese Windows NT. This branch is created in the TeamSite Intelligent File System with Shift-JIS encoding.
3. You can navigate this branch with the Japanese name using WebDesk or WebDesk Pro.
4. You can also log on to the server machine and access this branch with Japanese name using the file system interface.

Scenario 2

1. The TeamSite server is running in the `ja_JP.PCK` (Shift-JIS) locale on Solaris 2.7.
2. Your TeamSite Administrator copies a directory from the file system into the TeamSite Intelligent File System. This directory contains file and directory names with Japanese encoded names.
3. Your TeamSite Administrator creates a file in the TeamSite Intelligent File System with a Japanese (Shift-JIS) encoded name.

4. WebDeskPro and WebDesk users (on any client platform) can view and access this directory (and corresponding files) with a Japanese name.

Netscape Navigator Behavior

Once Netscape finds a UTF-8 page, it uses UTF-8 as its default encoding for pages that do not specify their encoding. This may cause the browser to display pages incorrectly if the user browses pages that do not specify their encoding, or creates pages without specifying the encoding. Consider the two following scenarios:

Scenario 1

1. A Japanese user goes to a Japanese site that does not specify its encoding. Netscape defaults to Japanese (Auto-Detect).
2. The Japanese user logs into TeamSite (UTF-8 pages). Netscape switches to UTF-8.
3. The Japanese user opens a new window and returns to the Japanese site that does not specify its encoding. Now Netscape defaults to UTF-8.

   This would not happen if the site specified the encoding of its web pages.

Scenario 2

1. A Japanese user logs into TeamSite (UTF-8 pages). Netscape switches to UTF-8.
2. The Japanese user's content in TeamSite does not include the 'Content-type' META tag.
3. Upon entering SmartContext QA, Netscape tries to render the content as UTF-8, which is probably wrong. The solution to this problem is to always specify the encoding for all HTML content.

Multiple Languages, One Web Site

TeamSite allows contributors to use any or all of the supported languages in its GUI. However, users who want to see multi-language content must have browsers capable of doing this. For example:

1. In TeamSite, a Japanese user enters some submit comments in Japanese.
2. If an American user wants to view the version history, then the American user's browser must be capable of correctly displaying Japanese characters.

Glossary

Administrator

The owner of a branch, responsible for the project being developed on it. An Administrator can perform all the functions that an Author or an Editor can, and can also create and delete new sub-branches and workareas on his branch. Administrators exercise control over workflow by giving workareas to editors and sub-branches to other administrators.

Advanced File Merging

TeamSite can automatically merge two separately modified versions of a file, producing a new file containing the changes made by both users. Advanced File Merging is completely automatic if the edits were made to different parts of the file (non-conflicting edits).

Author

A primary web content contributor with limited access to the TeamSite system. Authors can access, create, and modify web content through their Editors' workareas. An Editor can assign specific files to an Author, which will appear in the Author's To Do list.

Autoprivate

The Autoprivate feature helps minimize clutter on the development server. Autoprivate automatically identifies file types that should not be submitted to the staging area and marks them as Private. These files typically include Macintosh resource forks (.FRK), Microsoft temporary files (.TMP) and various backup files (.BAK).

branch

A path of development for a body of content developed and maintained by a team. Each branch contains one or more workareas, a staging area, and a published edition and may contain sub-branches and previous editions.

Branches are depicted in TeamSite with the  icon.

comment

A note attached to a file, directory, workarea, branch, edition, job, or task. Comments can be attached to workareas, branches and editions when they are created. Comments can be attached to files and directories when they are assigned, returned, rejected, locked or submitted. Global comments can be set when these functions involve multiple files.

Compare

A function that displays a list of the differences between any two TeamSite objects. Objects that can be compared include workareas, staging areas, or editions.

conflict

Occurs when multiple users make changes to the same file in multiple locations, for example, when a file has been changed in two different workareas.

conflicting edits

Occur when multiple users make changes to the same parts of the same file, producing two versions of the file that cannot be automatically merged. Conflicting edits require users to specify which individual changes will go into the merged version.

contributor

Any user of TeamSite that modifies or creates content for the Web site. "Contributor" is a generic term that does not designate any specific TeamSite role (for example, Author, Editor, Administrator, or Master).

edition

A frozen, read-only snapshot of a branch of development. An edition contains a copy of all the files in the staging area at the time it was published. New editions can be released to production servers as complete, functional Web sites. Editions also serve as rollback points for projects in development, and they provide permanent archives of the Web site for Site Rollback. Editions are depicted in TeamSite with the  icon.

Editor

The owner of a workarea or workareas. Editors assign files to Authors, manage files, and edit and create files, submit content to the staging area, and may publish editions. Editors may have access to workareas that they do not own, but they cannot assign files in these workareas.

history

A complete record of all changes that have been made to a file through time. A user can see the complete history of a file by selecting it and selecting **History** from the **View** menu.

Home page

A user's overview of the TeamSite system. By default, an Author's Home page will display his Task list. An Editor's or Administrator's Home page will display an overview of the TeamSite system. The Home page can be set to any directory where the user has access.

initial edition

The first edition on a newly created branch. The initial edition serves as the original source of content for all workareas on a new branch. This edition may be empty, or it may be a copy of an edition from another branch.

job

A set of interdependent tasks. Each job is a specific instance of a workflow model.

locking

Restricting file access within a branch. Locking a file reduces the possibility of conflicting edits but also reduces the team's ability to work on files simultaneously. Every time a file is locked, the version in the workarea is compared with the version in the staging area and the latest is taken (although this behavior can be overridden). TeamSite supports three types of locking, or locking models: Submit Locking, Optional Write Locking, and Mandatory Write locking. The locking model is defined at the branch level by the Administrator.

main branch

The first branch created when TeamSite is installed. The Main Branch is owned by the Master user. All branches in the TeamSite system are subordinate to the main branch.

Mandatory Write locking

A type of locking where users are required to lock a file in order to edit it. Until a user locks a file, all files in his workarea are read-only. Taking the write lock allows only a single person to modify the file at a given time, ensuring serial development and eliminating conflicting edits.

Master

The owner of the main branch. The Master user is responsible for the entire Web site. The Master organizes the structure of the TeamSite system and coordinates the activities of all users, and can also perform all functions on all branches.

merge

The process of reconciling conflicts between versions of a file that have been edited by two people. The two versions can be merged in the staging area to produce a new version of the file, incorporating changes made by both users. Merging can be automated with TeamSite's Advanced File Merging.

Navigation Window

The left-hand side of the TeamSite window, which allows you to navigate through TeamSite by clicking on the underlined names of branches, workareas, staging areas, editions, or directories.

Optional Write Locking

A type of locking in which users can choose to lock a file to ensure no other users edit the file, even within their own workareas. When a user locks a file, it becomes read-only to all other users. Under the Optional Write Lock model, locking files ensures serial development of those files and reduces the risk of conflicting edits

Private

Within a workarea, a user can mark a file as *Private*, which prevents the file from being submitted to the staging area if the file is a part of a workarea or directory that is submitted. It also prevents the file from being copied to another workarea during a *Copy To* operation.

Public

The opposite of *Private*, the *Public* function removes the private marking on a file. All files are public by default.

publish

To create a new edition based on the current staging area.

Site Rollback

The process of deploying a previous edition in place of the current Web site. Because TeamSite editions are complete copies of the entire Web site at the time of publication, they can be referenced to revert to prior versions of files, directories, or the entire Web site.

SmartContext™ QA

The use of individual workareas and staging areas to allow users to test their work in the context of the entire Web site without actually deploying the Web site. This allows Authors, Editors and Administrators to catch and fix their own mistakes at an early stage.

SmartContext™ Editing

The ability to edit a file while browsing the Web site. This provides a simple, intuitive way of finding the file you want to edit, editing it in context and see your changes immediately.

staging area

The area where users integrate the contents of their workareas. Users submit read-only copies of files from their workareas to the staging area to integrate with other contributions, and test the integrity of the resulting Web site. Staging areas are depicted in TeamSite with the  icon.

sub-branch

A branch subordinate to a major branch. To separate development efforts among teams or team members, an Administrator can create sub-branches. The sub-branch receives its own unique staging area and workareas and generates its own editions. Editions published on a sub-branch can be integrated back into work on the higher branch, or released as stand-alone Web sites.

submit

The act of transferring Web site content from a workarea to the staging area.

Submit Locking

A type of locking in which users can choose to lock a file to insure that their changes will be submitted to the staging area. While a file is locked, other users can edit their own version of the locked file within their workarea, but they cannot submit to the staging area. Once the lock holder has released the file lock, other users can merge their modifications with the new file version.

task

A unit of work performed by a single user or process. Each task in a job is associated with a particular TeamSite workarea and carries a set of files with it.

task transition

Selecting a task transition moves the job along the workflow process by activating successor task(s).

TeamSite Templating

A TeamSite module that allows you to configure the look and feel of your web pages. For more information, consult *Using and Configuring TeamSite Templating*.

template

A file that specifies attributes of another file, such as look and feel. When you create a file, you can choose to base that file on a template.

To Do list

A user's initial view of the TeamSite system. The To Do list shows the user which tasks and jobs he is responsible for, and allows the user to do the necessary work to complete the tasks.

unlock

To remove a lock from a file. If an Editor has locked a file, the branch Administrator or Master user can also remove the lock. The Master user can remove any lock from any file.

user

A TeamSite Author, Editor, Administrator, or Master.

Web site

A generic term, meaning a set of interrelated files viewed through a browser. In TeamSite, the term "Web site" generally refers to all the contents on a branch of development, though these may be a superset or a subset of an organization's actual Web site.

workarea

A virtual copy of a Web site, which may be worked on independently without affecting the actual site or the work of other contributors. A workarea can be owned by a single user or a number of users together. Editors and Administrators can own workareas, but Authors cannot. Workareas are depicted in TeamSite with the  icon.

workflow

A system for defining the necessary processes for content creation and approval. See also "workflow model," "job," and "task."

workflow model

A general workflow configuration that can be used repeatedly. Each workflow model describes a process which may include user tasks and a wide variety of automated tasks.

Work Window

The right-hand side of the TeamSite screen, which allows you both to navigate through TeamSite and to manipulate files.

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