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Content Author

Administrator's Guide

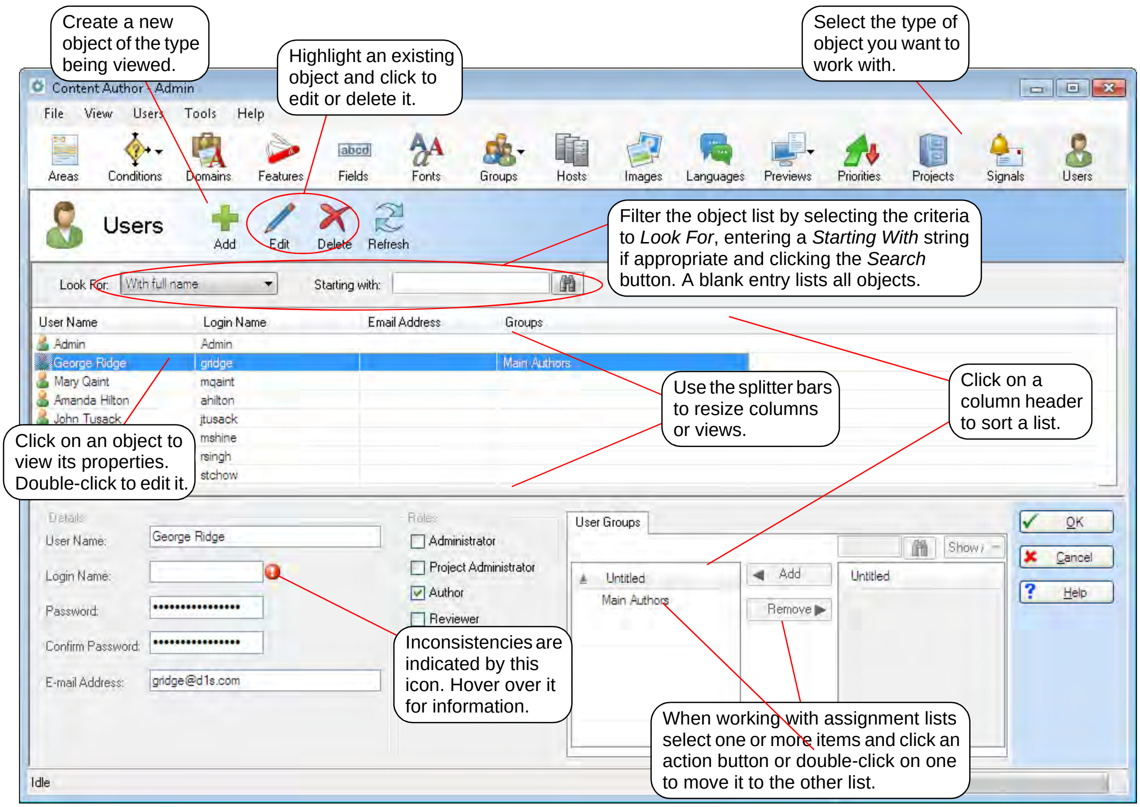
Version 6.6 Service Pack 8

Contents

About the Administration Client and administrators

The Content Author Administration Client is a Windows desktop program that allows designated administrators to specify and control the Content Author environment and to coordinate its interaction with the main Designer modules.

The main window of the Administration Client has a similar layout regardless of the object type you are working with. An upper pane allows you to list, filter and sort objects and a lower pane allows you to view and edit the properties of the selected object.



The *Options* available from the *Tools* menu enable you to customize the Administration Client:

Units: override the units of measure (UOM) – default is as set by the locale for your pc.

Colors: change the colors used in the activity bar.

Database: limit the number of items initially populating a list – this can speed up the screen refresh when there are many items stored.

Publishing: configure behavior when saving changes and selecting messages for publishing.

There are two administrator roles – the full Content Author Administrator who can perform all administrator functions and a Project Administrator who can manage users, groups and the message workflow at the project level for all users other than full administrators.

A full administrator creates the working environment for other Content Author users. In addition to defining and grouping the user accounts themselves you will need to create *message areas* that constrain content to a suitable space and make appropriate design resources available (fonts, images, data fields, etc.).

It follows that full administrators must have a good working knowledge of the Designer applications for which the content is intended. Ideally the Content Author administrator should also have control over the main publication design in the Designer to ensure the layout is suitable. The administrator is also responsible for deploying new and amended content to the production system when appropriate.

> REFER TO THE DESIGNER USER'S GUIDE FOR DETAILS OF USING THE DESIGNER TO CREATE THE REQUIRED LINKS TO THE CONTENT AUTHOR ENVIRONMENT AND FOR APPLYING CONTENT TO THE PRODUCTION SYSTEM.

Working with Content Author objects

Many types of object rely on other resources having been previously defined: for example, before creating a condition you must have defined at least one data field object to use as a parameter. For this reason it may be useful to create the objects in the order listed below when setting up a new Content Author project:

- users: login credentials and individual user roles – see page 8
- user groups: applies roles to multiple users – see page 9
- review groups: users in the approval workflow – see page 10
- fonts: typefaces that can be used in messages – see page 12
- images: graphic resources that can be used with messages – see page 13
- message areas: represent reserved space on document page designs – see page 11
- data fields: links to values available in main publication designs – see page 13
- conditions: criteria for including /excluding messages in documents – see page 14
- languages: also criteria for including /excluding messages in documents – see page 15
- feature sets: design options that can be used with messages – see page 16
- signals: enables actions to be performed when message is placed – see page 16
- priorities: settings to allow ranking of messages when space is limited– see page 17
- preview applications: publication resources to allow in-context viewing – see page 21
- hosts: production systems to which messages are to be deployed – see page 25
- domains: collections of control objects to be applied to projects – see page 20
- projects: groups of messages and associated controls – see page 20

▶ To create, edit or delete an object: open the appropriate view and click an option on the button bar or select the option from the *Edit* menu.

> Objects can only be deleted if they are empty and not used or referenced by any other object in the Content Author. You can use the Report option to check where an object is used. See "Generating reports" on page 31 for more details.

Administering users, roles and access rights

> Administrators do not automatically have *Author*, *Reviewer* or *Reader* rights.
> If these are required in addition to *Administration* rights then the roles must be specifically assigned.

All Content Author users must be registered before they can access either the Content Author itself or the Administration Client. Users are allocated one or more roles that indicate their usual activity within the system – *Administrator, Project administrator, Author, Reviewer* or *Reader*. Note that authors, reviewers and readers must also be specifically added to particular projects or folders before they can work with messages although user groups can be set up to simplify this process. Review groups are special user groups that identify people involved in the message approval workflow. Project administrators can manage all users except full administrators.

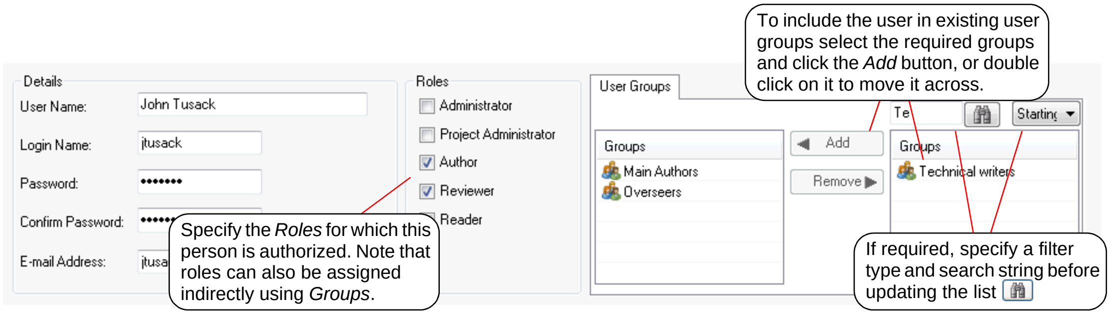
Users

You should provide the following *Details* for each user:

User Name:	the person's actual name. This must be a unique name.
Login Name:	the account name to be used at login time – typically an abbreviated version of the real name although any alias may be used. This also must be unique.
Password:	the password required at login time.
E-mail Address:	you should specify an e-mail address for any user that needs to participate in the approval workflow. Specify this as you would an external e-mail address, for example jsmith@bigcorp.com.

▶ To create or modify a user:

1. Select *View/Users* from the menu or click the Users icon 
2. Click *Add* to create a new user or select an existing user from the list and click *Edit* to modify it.
3. Use the properties section to supply user details, assign roles and include the new entry in existing groups. Click OK to save changes.



User groups

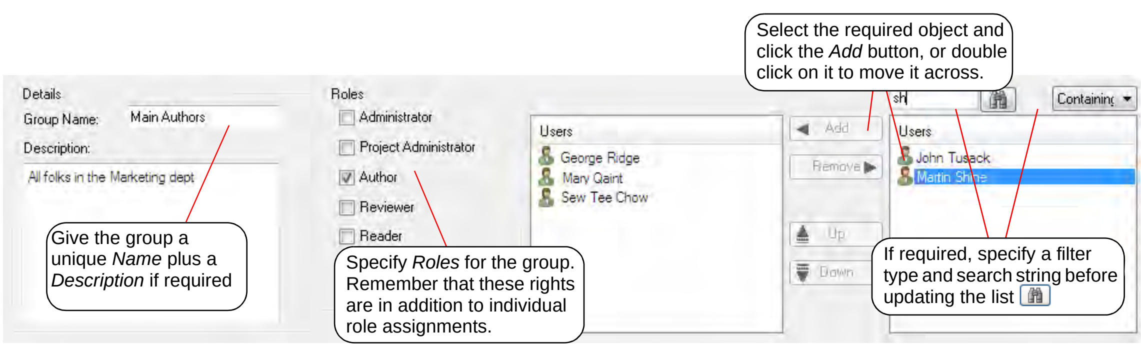
User groups allow you to manipulate multiple user accounts at the same time when:
– assigning roles
– giving authors access to particular projects and folders.

The permissions specified for a group are added to any rights assigned to the associated user accounts individually. For example, a user object has the *Author* role assigned and is permitted individual access to the 'Mainland Europe' project; the user is then added to a group that has the *Reviewer* role assigned and the group is given accesses to the 'South Asia' project. The user now has author access to both projects and reviewer access to 'South Asia'.

Note that project administrators will not be permitted to select or change groups that contain a full administrator.

▶ To create or modify a user group:

1. Select *View/Groups/User Groups* from the menu or click the Groups icon  and then select *User Groups*.
2. Click *Add* to create a new group or select an existing user from the list and click *Edit* to modify it.
3. Use the properties section to assign users and other details, and click OK to save changes.



Review groups

A review group specifies the users that need to be included in a review cycle. Reviewers must be included in such a group – individuals cannot be assigned to a review process – but a group can contain a single reviewer if required. You can specify that all of a group's members must review a message or that any one member can review it. Review groups are often organized around a particular function or those users who will review messages from a given point of view: for example, proof reading, which might have 'any' approval, content, legal and so on which might have 'all' approval. Approval must be given by all review groups before a message can be published, but the review cycle ends if and when a message is 'denied'.

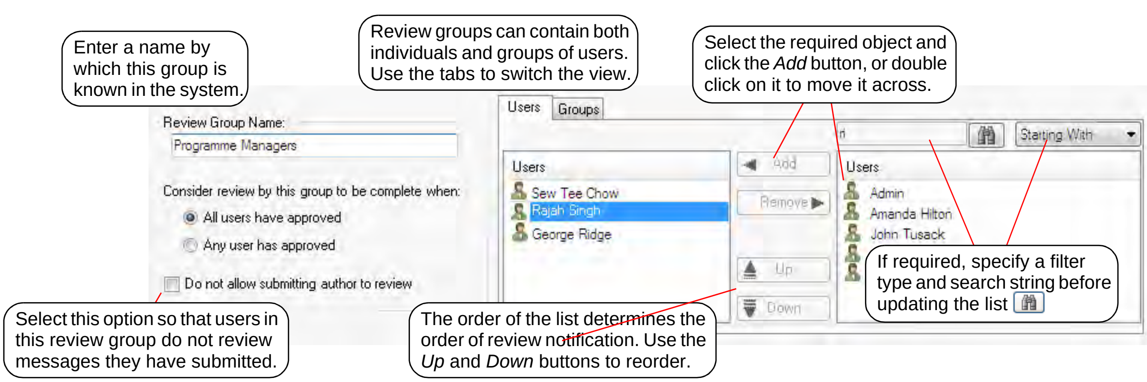
When <u>all</u> users must review a message the reviews are sequential and an e-mail will be sent to the next person in the chain once approval has been given by the previous person. The sequence is governed by the order of the review groups in the cycle, first of the project and then the folder, and within them, the order of the users and then the groups. A user will only review a message once per review cycle irrespective of how many groups or review groups they belong to.

When <u>any</u> user from the review group needs to review a message an e-mail is sent to all users in the group. Once the message has been reviewed by one member no other reviews from that group will be allowed. If the message needs to be reviewed again then it is open to any member of the group. Note that these single user reviews are identified by their review group name.

Review groups can be added to projects and folders and are applied to every message included in that project or folder – see "Projects and folders" on page 18 for details.

▶ To create or modify a review group:

1. Select *View/Groups/Review Groups* from the menu or click the Groups icon  and then select *Review Groups*.
2. Click *Add* to create a new group or select an existing group from the list and click *Edit* to modify it.
3. Use the properties section to assign users and other details, and click OK to save changes.



Creating design resources

Design resources are the objects that are made available to authors for use with message content or control. They consist of message areas, fonts, images, data fields, conditions, languages, feature sets, signals and priorities.

The messages created within Content Author eventually appear in the context of an overall Designer publication design so it is important to make sure design and style constraints are enforced and resources are properly linked. For these reasons authors may only work with the design resources made available to them via the Administration Client.

By default, all such resources can be used by any message. Where you need to apply different controls to different messages (for example where messages are intended for different publication designs) you can use a domain to restrict the resources available to messages within particular projects or project folders.

Message Areas

> BY DEFAULT, AUTHORS MAY PLACE MULTIPLE MESSAGES IN A PAGE DESIGN. HOWEVER YOU CAN SET UP A RESTRICTION AT FOLDER LEVEL THAT ONLY ALLOWS A SINGLE MESSAGE AREA TO BE PLACED ON THE PAGE, SEE “FOLDER PROPERTIES” ON PAGE 19.

Message areas represent reserved space in Designer page designs within which messages are scheduled for inclusion. They can be thought of as rectangles that define the maximum size of the content an author can include in an individual message. In the production system multiple messages can appear in the same area provided there is enough vertical space.

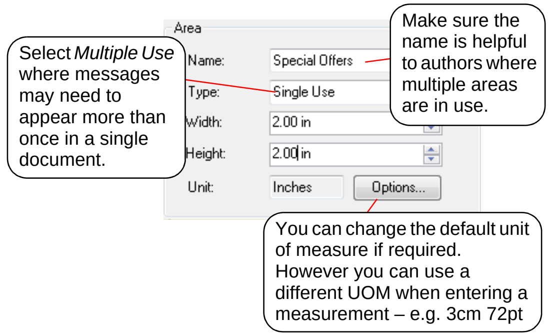
Typically you will need to create one message area for each piece of reserved space – the *message box* – in the relevant Designer publication design. Where multiple areas are available in the same project it is important that the name should enable authors to distinguish between them.

Messages can also be included directly in the flow of the text on the Designer page as a *message stream*, which has no specific size restrictions.

If required, the same message area can be scheduled for multiple boxes to allow its messages more opportunities to be placed. In these circumstances messages will still only appear once per document unless the *Multiple Use* type is selected.

To create or modify a message area:

1. Select *View/Areas* from the menu or click the Message Areas icon 
2. Click *Add* to create a new message areas or select an existing areas from the list and click *Edit* to modify it.
3. Use the properties section to name the area and provide its dimensions:
4. Click OK to save the changes.



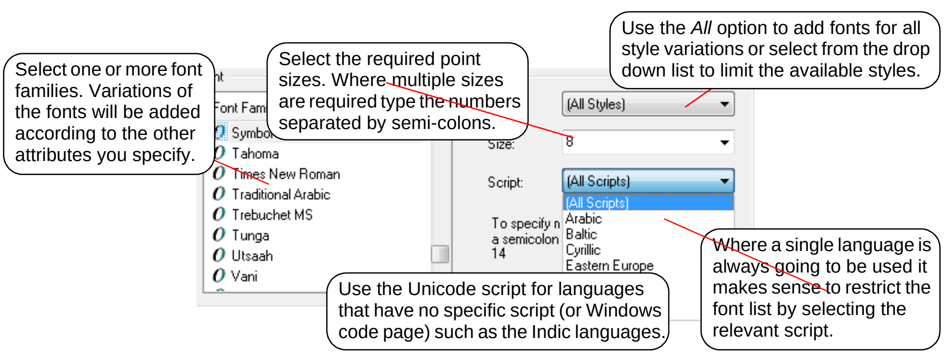
Fonts

Text elements in Content Author messages are created using standard Windows font resources. Where appropriate these are converted to the format required by the target output datastreams when the messages are deployed to the production system.

Fonts are identified using a combination of their typeface (font family), style, point size and language script. Each permutation of these attributes constitutes a separate font within Content Author.

To add fonts:

1. Select *View/Fonts* from the menu or click the Fonts icon 
2. Click *Add*.
3. Use the properties section to identify the fonts to be added and click OK to save changes.



Images

can be provided in many standard Windows formats including bmp, jpeg, gif, png, tif, etc. Where appropriate these are converted to the format required by the target output datastreams when the messages that make use of such images are deployed to the production system. Note that images are considered to be unique in Content Author and cannot be updated. If a new version of an image is required it must be imported using a new name and applied to the relevant messages.

To add images:

1. Select *View/Images* from the menu or click the Images icon 

   The current list of available images is displayed.

2. Click *Add*.

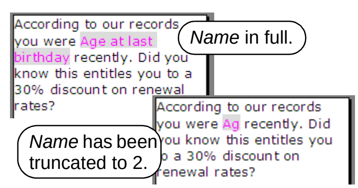
3. On the *Import* dialog box select one or more images and click *OK*.

Data fields

Data fields are links to values provided by main Designer applications and can be inserted directly into messages or used as part of message selection conditions. Within Content Author the data field objects created by the administrator are simply placeholders for the actual data that will eventually be available in the production environment.

The content of a data field is dynamic and is set in relation to individual documents as they are processed in the production environment. In the Designer the association between a Content Author data field and a value is made using a *Set Variable* action. The data field references themselves (i.e. their *Names*) are made available to the Designer as part of the message environment file. See “Creating resources for Designer” on page 24 for details of this file.

When a data field is used within message text its *Name* is displayed in place of the value that will eventually appear in the production environment. You can limit the length of this display value if required. The *Data type*, *Maximum length* and *Data Ranges* options are only significant when the field is to be used as part of a condition.

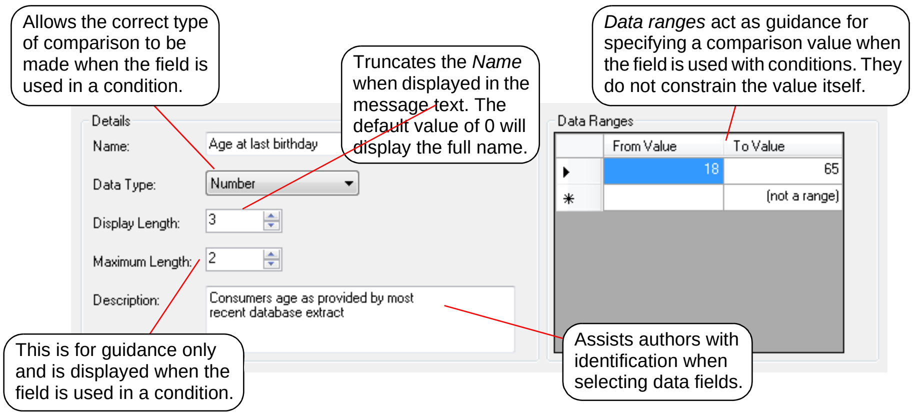


To create or modify a data field:

1. Select *View/Fields* from the menu or click the Data Fields icon 

2. Click *Add* to create a data field or select an existing field from the list and click *Edit* to modify it.

3. Use the properties section to give the field a name and other attributes if required, and click OK to save changes.



Conditions

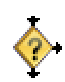
The decision to include or exclude a message from particular documents is often made according to general message attributes such as priority, language (see page 15), or effective date. For more complex requirements you will need to create condition objects that query one or more variable values available to documents as they are processed by the main Designer application. For example, you may specifically want to include a message in documents where the 'city' field contains 'New York' or perhaps exclude a message where the 'age' field is less than 30. Such values are known as data fields and are discussed on page 13.

> ⓘ BEAR IN MIND THAT MESSAGES MAY ALSO BE REJECTED SIMPLY BECAUSE THERE IS INSUFFICIENT SPACE IN THE APPROPRIATE MESSAGE AREAS. ADDITIONALLY, *MESSAGE CONDITIONS* CAN ALSO REJECT MESSAGES THAT A *PROJECT CONDITION* SELECTED FOR INCLUSION.

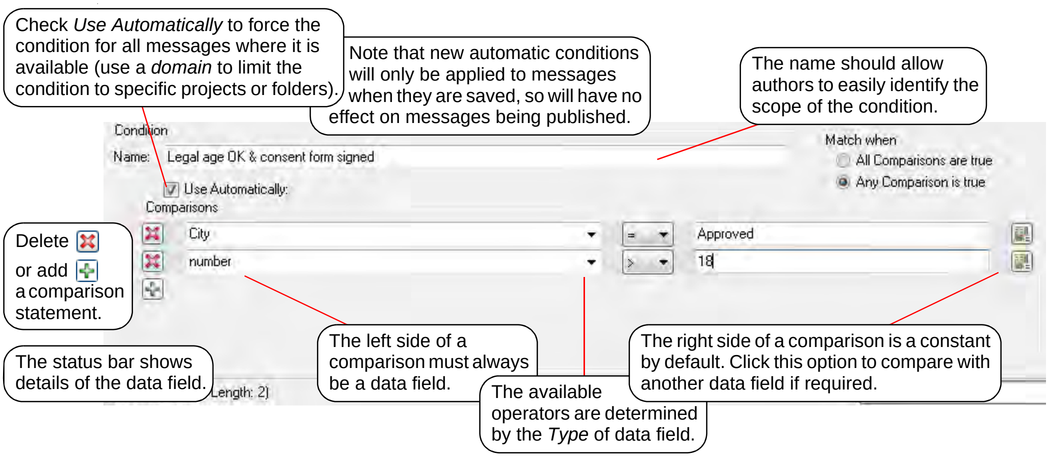
An administrator can set up global conditions for use by authors (and restrict their availability using a domain as with other objects). Additionally, providing the relevant data fields are made available to them and conditions have not been disallowed via the folder (see “Folder Properties” on page 19), authors can set up conditions that relate to a specific message only.

Conditions are always created as one of two types – *Select if* or *Exclude if* – indicating the effect the condition has on message selection when its criteria evaluates true. You cannot mix inclusion and exclusion criteria in a single condition but multiple conditions can be applied to a single message if required.

To create or modify a condition:

1. Select *View/Conditions/Select If* or *Exclude If* or click the Conditions icon 
2. Click *Add* to create a new condition or select an existing condition from the list and click *Edit* to modify it.

3. Use the properties section to name the condition and specify its comparison statements, and click OK to save changes.



Languages

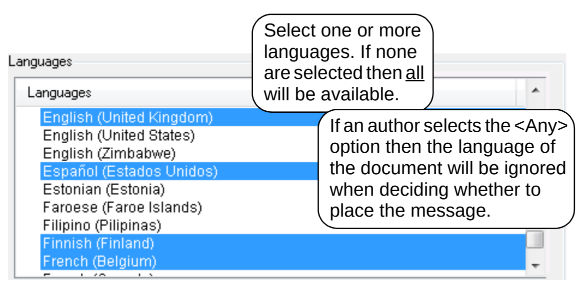
Languages can be used as part of the selection criteria when deciding if a message should be included in or excluded from a document when it is published – i.e. a document whose locale (as set in Designer) matches the language. By default the languages that are available when an author creates a message are all those that are available in Content Author. You can subset this list by specifying that only certain languages will be used. Languages can be restricted globally or via a domain.

To restrict available languages globally:

1. Select *View/Languages* from the menu or click the Languages icon 

2. Click *Add*.

3. Use the properties section to identify the languages to be added and click OK to save changes.



Feature Sets

You can restrict the use of certain format and drawing options available to an author when designing a message. These editor options are configured in a feature set and can be assigned to one or more domains. By default, all editor features are available for use with a message. Features can be restricted globally or via a domain.

> WHERE MULTIPLE FEATURE SETS APPLY TO A MESSAGE, AND A SPECIFIC FEATURE IS ENABLED IN ONE FEATURE SET AND DISABLED IN ANOTHER THEN THE ENABLED SETTING TAKES PRIORITY.

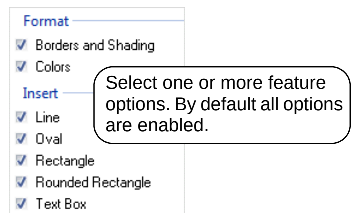
To create or modify a feature set:

1. Select *View/Features* from the menu or click the Feature Sets icon 

   The current list of available feature sets is displayed.

2. Click *Add* to create a feature set or select an existing feature set from the list and click *Edit* to modify it.

3. Use the properties section to enable or disable the required options and click OK to save changes.



Signals

When a signal is applied to a message, it is an indication to Generate to perform a set of actions as specified in the Designer when that message is placed in a document. For example passing information to inserter equipment so that brochures, flyers etc. can be added to the same envelope.

Signals can be assigned to any message and messages can have any number of signals. As with other objects the use of signals is not restricted, unless they are assigned to a domain or disallowed via the folder (see “Folder Properties” on page 19). Signals consist only of a name and description.

Signal information is passed to Designer in the environment file which must be exported to Designer following any changes to signal configuration, including domain assignment. See “Creating resources for Designer” on page 24 for more details.

To create or modify a signal:

1. Select *View/Signals* or click the Signals icon 

2. Click *Add* to create a new signal or select an existing signal from the list and click *Edit* to modify it.

3. Use the properties section to give the signal a name and description. The signal name is mandatory and must be unique; the description is optional, but both should be chosen carefully as they serve as a guide to the message authors and to the Designer user as to what should happen when the signal is raised.

Priorities

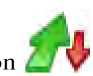
A message's priority determines the sequence in which the production environment adds it to the documents for which it has been selected. It is common to have more messages aimed at a particular document than can be placed within the available message area space and when this occurs those with a higher priority have a greater chance of being included.

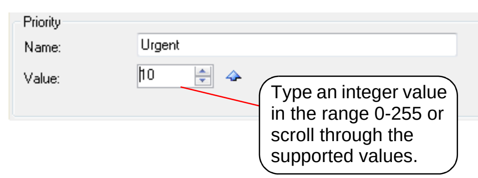
A MESSAGE CAN ALSO BE FLAGGED AS *MANDATORY* INDICATING THAT IT MUST ALWAYS BE PLACED IN DOCUMENTS FOR WHICH IT IS SELECTED (REGARDLESS OF PRIORITY). WHERE THIS IS THE CASE YOU CAN USE A JOB SETTING TO DETERMINE HOW THE PRODUCTION SYSTEM SHOULD DEAL WITH MANDATORY MESSAGES THAT CANNOT BE PLACED.

The priority settings that can be assigned to individual messages by authors are created and maintained by an administrator. Unlike other design resources the settings apply globally to all applications supported by the Content Author environment. Each priority is defined as an integer value between 0 (highest priority) and 255 (lowest) and has an associated name by which it is presented to authors and reviewers. When Content Author is first installed the following priority is created:

255 *Default* (lowest priority – assigned to new messages by default)

To create or modify a priority setting:

1. Select *View/Priorities* from the menu or click the Priorities icon 
2. Click *Add* to create a new priority setting or select an existing priority from the list and click *Edit* to modify it.
3. Use the properties section to give the priority a name and assign a priority value.
4. Click OK to save the changes.



Managing Content Author projects

Messages are always created within a project structure created by an administrator. A project is made up of one or more folders that contain the actual messages. Users are assigned permission to create messages within specific projects or folders. Project administrators will only have access to those projects they have created themselves, and those assigned to them by an administrator.

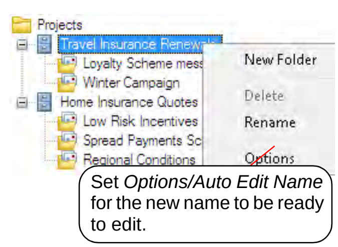
You can also control the design resources that can be used by messages within a project via a *domain*.

It is often useful for authors and others to view messages within the context of the document designs for which they are intended. You can create *previews* to support this.

Projects and folders

Projects are typically used to organize messages according to the main Designer applications they will be used with. For example you might have projects for "Travel Insurance Renewals" or "Savings Account Statements". Within such projects you will need to create one or more folders to contain the actual messages. Folders typically group messages according to the same theme or project phase. For example, you might have folders for "Loyalty Scheme" or "Winter Campaign". The approval workflow is managed at the project/folder level. Information about data fields and message areas in projects is made available to the Designer as part of the message environment file.

▶ **To work with projects or folders:**
Select *View/Projects* from the menu or click the Projects icon 



▶ **To create a new project:** right-click on the main Projects folder and select *New Project* from the menu.

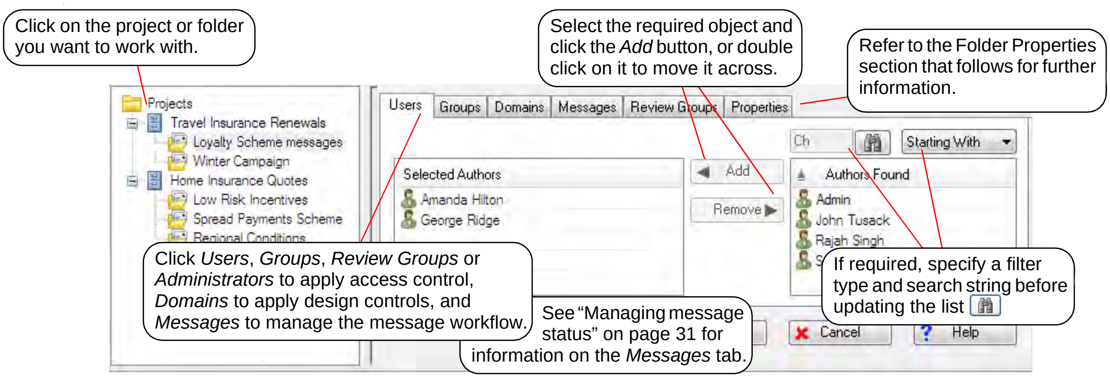
▶ **To create a new folder:** right-click on the project you want to add a folder to and select *New Folder* from the menu.

Applying user and design controls

Users and groups must be specifically assigned to projects and folders in order to be able to use them. However, by default, authors are able to use all available design resources unless one or more domains are assigned to the project or folder. Project administrators can only work with those projects they have created, or to which they have been assigned.

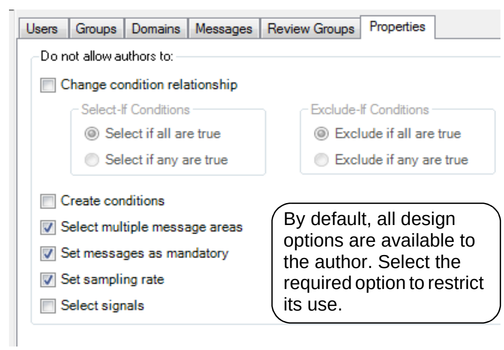
You can choose to apply such user or design controls to either an entire project or to a specific folder. The effects of these controls are cumulative within the project structure. For example, you specify that the 'Technical Author' user group can access the Travel Insurance project. This project contains a Loyalty Scheme folder to which only the 'Proof Readers' group is assigned. The Technical Author group will be able to create messages in any folder within the project including Loyalty Scheme but Proof Readers will only be able to access the specific folder to which they are assigned.

To apply user or design controls: select the required settings and click *OK*.



Folder Properties

The *Properties* tab allows you to restrict the use of certain design options available to authors at folder level, such as:



- Whether conditions can be changed or created through the use of the *Change conditions relationship* and *Create conditions* restrictions.
- The selection of message areas for a message. Click on the *Select multiple message areas* option to allow only a single message area to be chosen.
- The ability to flag a message as mandatory, indicating that it must always be placed in documents for which it is selected. Select the *Set messages as mandatory* option to disallow its use.
- Controlling the number of times a message can appear in a production run of a publication. Select the *Set sampling rate* option to disallow its use.
- The selection of signals to ensure certain predefined actions are performed by Generate during production. Choose the *Select signals* option to disallow its use.

Note that messages that have already been created before folder restrictions are set will have the restrictions applied only if that option is edited.

Domains

By default, all design resources including actual message areas are assumed to be applicable to all messages. This may be suitable for situations where all messages are intended for use with a single publication design. Where Content Author needs to interact with multiple publication designs however, or where particular types of messages require different design constraints you will probably want to control the resources available to authors. To do this you must create domain groups which, once applied to specific projects and folders, limit the design resources that can be used when creating messages within these containers. Administrators may also use domains to apply specific workflow controls to messages such as identifying the appropriate review groups that need to involved.

> NO CONSTRAINTS ARE APPLIED TO OBJECTS IN A DOMAIN; I.E ALL OBJECTS OF THAT TYPE WILL BE AVAILABLE TO AUTHORS WITH THE EXCEPTION OF CONDITIONS – SEE BELOW.

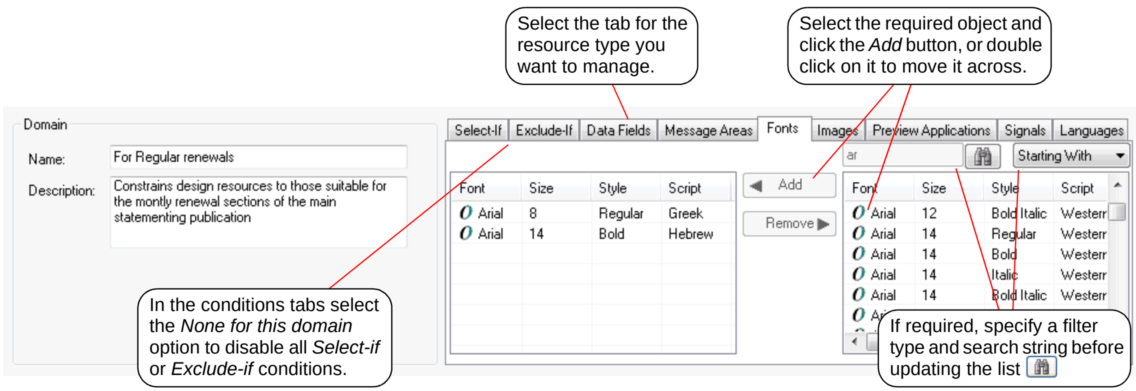
A domain is simply a listing of associated control objects. For example, you may want to create a domain that references all the resources to be used by messages aimed at a particular Designer publication. This will typically include the specific message areas that are suitable for the document layouts plus the data fields that are based on the publication's input data. The administrator may often make available predefined message selection conditions that reference the data fields. Such domains will often also constrain the fonts available to authors to those that are in keeping with the main document designs and may also include a list of authorized images.

Conditions

As with other control objects in a domain you can restrict the predefined conditions that will be available for use with a message, and if none are restricted then all will be available.
If required you can specify that no predefined conditions are available for Select-if or Exclude-if in a domain. The author will still be able to define their own message conditions, but this can be restricted using the folder – see "Folder Properties" on page 19.

▶ To create or modify a domain:

1. Select *View/Domains* from the menu or click the Domains icon 
2. Click *Add* to create a new domain or select an existing domain from the list and click *Edit* to modify it.
3. Use the properties section to give the domain a name and a description, and to add the relevant control objects of each type. Click OK to save changes.



▶ To apply a domain to messages: add it to the properties of the relevant projects and folders. Open the Projects view, select the required project or folder from the list and use the properties section to add the domain. See “Applying user and design controls” on page 18 for details.

Configuring previews

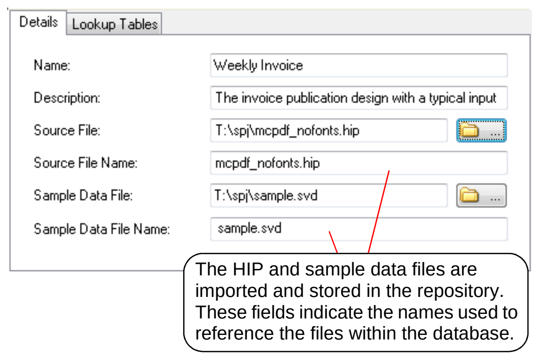
Preview applications allow Content Author users to view messages within the context of sample output from the full Designer publications for which they are intended. Such previews make use of the .HIP file that controls a Designer publication in the production environment and which is created when it is published in the Designer. Effectively a preview runs an embedded version of the Generate production engine using a sample of the input data that normally drives the application. A preview application (configured for PDF) must be created in Designer and both the HIP file and sample data file made available for Content Author preview. (Note that the HIP file must be a complete publication containing both design and resources.) Any lookup tables used by the application must also be made available or, if they are not required for the preview, can be disabled. All files are loaded to the Content Author repository for use when the preview is run. See the Designer User’s Guide for information on HIP file generation.

Once configured a preview can be used in two different ways.

- **Preview Message**: when used by authors and reviewers in the Content Author client a preview forces the current message to be selected for the defined message area so that it can be viewed within the context of the relevant page layouts. The possible effects of other messages are ignored in this mode.
- **Message Proofing**: a preview can also be used by administrators to view the effects of all the messages in entire projects or folders in the context of publication output. This is effectively previewing the output that would be produced if the selected messages were published. You should also run proofing to verify that the preview application is working correctly before making it available to authors and reviewers.

⧐ To create or modify a preview application:

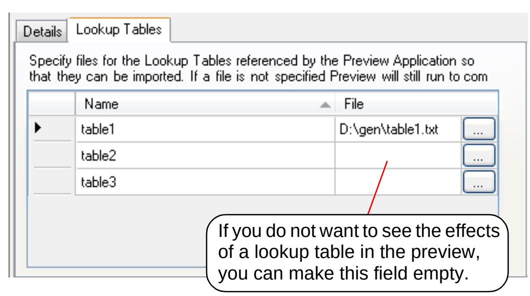
1. Select *View/Previews* from the menu or click the Previews icon 
2. Click *Add* to create a new preview application or select an existing preview from the list and click *Edit* to modify it.



3. Provide details of the Designer application to be used for preview.

   Use the *Details* tab in the properties section to give the preview a name and description, and identify the Designer HIP and sample data files that will generate the sample output.

   Use the *Lookup Tables* tab to specify any lookup tables that are in the Designer application and are to be used for the preview. The lookup tables are imported and stored in the repository.



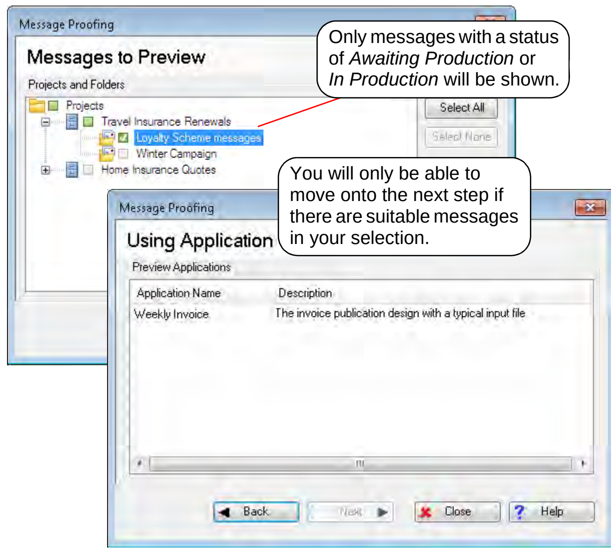
4. Click OK to save the changes.

⧐ To make a preview available for use with messages in the Content Author client: add the preview to a domain and then add the domain to the relevant projects or folders. See “Domains” on page 20 for details.

Running message proofing

When you proof messages in a preview application you need to select the messages that you want to be included in the sample job. These can only be either *Awaiting Production* or *In Production*. You would normally select the project or folder that relates to the publication referenced by the preview application, but if required you can select any combination of projects and folders for this purpose.

To proof messages:



1. Select *Tools/Message Proofing* from the menu.
2. In the *Message Proofing* dialog box select the projects and folders that contain the messages to be included in the run.
3. Click *Next* and select an existing preview application for the publication expecting the selected messages.
4. Click *Finish*.The system will automatically switch to the Message Proofing Output view.

   This view always contains the output from the last time a message proofing job was run. If a new job is run the content of the view is updated.
5. Check the job log.

   You should check the *Log File* tab to make sure the job ran correctly, and if not, correct any problems and rerun the proof job.
6. Check the output.

   The *PDF Files* tab will contain a separate PDF document for each document produced by the Designer application. The number of documents available will depend on the sample data file specified for the preview application and whether the run completed successfully or not. Double-click any document to load it into a local browser for viewing.

Interfacing with Designer applications

At least one administrator must be responsible for interfacing with the main Designer & Generate applications at both the design and production levels. Ideally, an administrator should be assigned responsibility for all aspects of a particular application that makes use of Content Author messages including the tasks related to Designer, Generate and Content Author. Such administrators need to ensure that information about the message environment is correctly integrated into the main publication design and that new or updated messages are deployed for use in the production system as appropriate.

Creating resources for Designer

The design of Designer applications that need to include Content Author messages must take account of:

- The message areas created for the application: these must be included in *message box* or *message stream* objects in publication designs.
- The data fields used by messages or selection conditions intended for the application: these must each be mapped to actual values using a *Set Variable* object.
- Any signals that have been applied to messages: the required Designer logic must be supplied for each signal.

The names and properties of the available message areas, data fields and signals, along with related project information, are passed to the Designer in a Content Author *environment file*. Such files are created on demand by an administrator and automatically include references to all message areas, data field and signal objects in the Content Author repository. Note that it is not possible to work with message related objects in the Designer until an environment file has been created.

Note that during application development it is often useful for the Designer to have a sample messages file (see “Configuring the production environment” on page 25) for use with the preview feature. You can create and approve a range of test messages in the normal way and then publish them to a local file. In Designer use the Advanced Preview function to specify the messages file to the preview process.

The environment file is an XML construct that is written to disk as part of the export process. It can then be imported into the Designer as required.

▶ **To export an environment file:** select *Tools/Export Environment* from the menu and the *Export* dialog box is displayed. Browse to the folder where you want to save the environment file, provide a name for it and click *Save*.

Configuring the production environment

When new or amended messages are published they are batched into a *messages file* along with any resources required by the target output datastreams. You can specify that the publish process will automatically send the messages file to the target production system via an FTP link or that it will save the messages file locally for transferring manually. Content Author uses a *Host* object to contain the deployment settings required for a particular production system. Messages can be published for use with Generate or EngageOne® and the file produced will be a .HIM file for Generate or a zip file for EngageOne.

> To see your messages in the Advanced Preview feature in Designer you must also publish to PDF for Generate.

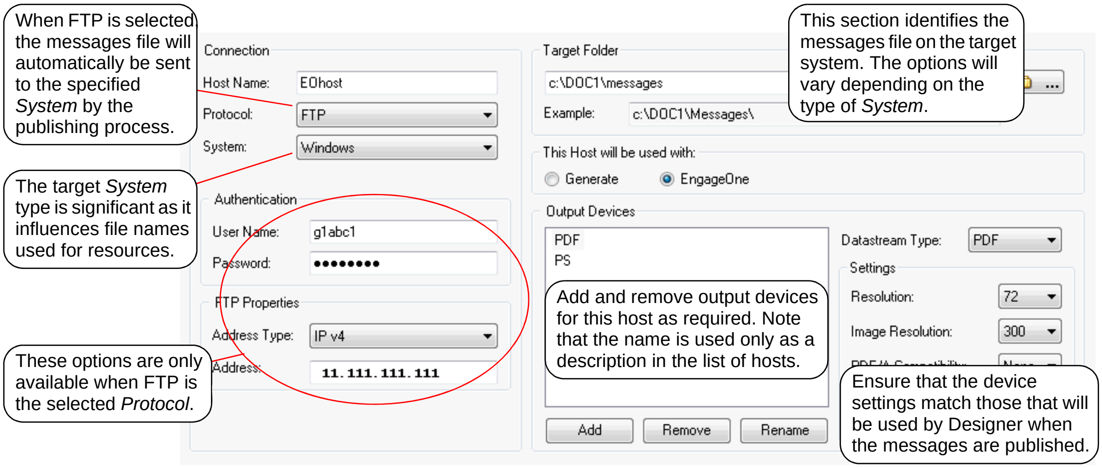
You will need to identify the types of output datastreams, or devices, being produced by the publications that the messages will be used with. This is to allow Content Author to generate the correct type of font and image resources so that message content can be reproduced on the relevant output devices.

> If you are setting up host objects that may be used by more than one user, make sure that the protocol and target locations you specify are available to all.

Content Author uses an FTP connection to send messages files to the target system. As with most FTP transactions you will need to be able to identify the server according to its name or IP address, and you will need to specify a valid account name and password.

▶ To create or modify a Host:

1. Select *View/Hosts* from the menu or click the Hosts icon 
2. Click *Add* to create a new host or select an existing host from the list and click *Edit* to modify it.
3. Use the properties section to specify details of the output devices to be supported and the target production system if appropriate. Click OK to save the changes.



Publishing messages for production use

Content Author publishing prepares selected messages for use with a production system, batches them into a single messages file for Generate or zip file for EngageOne® and deploys this file to the system and file location specified in the *Host* object used with the process. The publishing task also prepares any font and image resources used by the selected messages into the format required by the *Output* types indicated in the Host object and includes these in the messages file. See “Configuring the production environment” on page 25 for details of the Host object.

You can publish Content Author messages either directly in the Administration Client or by running a command line utility, which you can schedule to run as required.

> NOTE THAT YOU CANNOT RUN MORE THAN ONE PUBLISHING TASK AT THE SAME TIME.

All status information for publishing tasks is automatically logged – see “Working with the publishing log file” on page 29. Note that any critical publishing errors, for example an invalid file name, are reported and terminate the publishing job.

Publishing using Administration Client

The administrator can choose which approved messages to publish as part of the task although typically this be will the project or folder related to a particular Designer publication. By default, all messages for the selected project/folder are included in the messages file; if required you can use the *Incremental Generation* option to restrict the messages published to just those that have been approved but not yet published. This may be useful if you want to limit the size of the messages file being produced but when using this method you will need to specify both the current and all earlier versions of messages files to Generate to ensure a complete set of messages are available to the production system.

You can save the settings you use when running a publishing task so they can easily be reloaded when needed again.

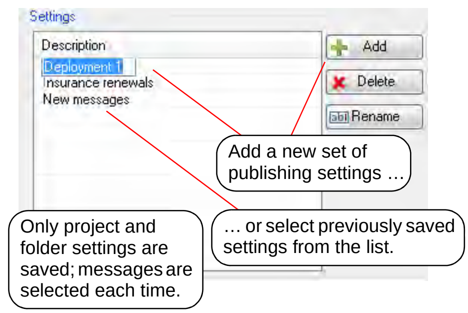
A messages file is associated by name with a particular production job either as part of the publishing task in Designer or within an override setting file (OPS) supplied to Generate in the production environment itself.

REFER TO THE "INTO PRODUCTION" SECTION OF THE DESIGNER USER'S GUIDE FOR INFORMATION ABOUT THE MAIN PUBLISHING TASK AND SETTINGS, OPS FILES AND RUNNING GENERATE.

You may specify multiple messages files for a production job. Where the same message appears in multiple files the message with the latest version number will automatically be used and any earlier versions discarded. Version numbers for messages are generated automatically by the Content Author system.

To publish approved messages:

1. Select *Tools/Message Publishing* from the menu.
2. In the Message Publishing Wizard you can choose to reload earlier publishing settings if required. Click *Next*.
3. Select or amend the projects, folders and messages you want to be published. Click *Next*.



4. Select the Hosts for which you want the messages file to be created. Remember that Host objects contain information about the output types supported for the application as well as the target server and file location. If the messages are going to be used within advanced graphics – such as rotated text boxes – in the Designer publication then you must select the *Include resources for advanced graphics features* option. Click *Next*.
5. Verify the chosen settings on the Summary page. Click *Next*.
6. Click *Publish* to launch the process.
   If required use the *Save* option to store the settings for reuse.

Publishing from the command line

The command line utility CAPublish is provided with the Content Author distribution material in the Admin folder. It uses the settings from a previously saved publishing task (as created within the Administrator Client) to define the message environment to be published.

Parameters that control the publication process are provided to CAPublish on the command line. Only a single publishing task can be run at a time.

▶ **To publish from the command line:** from the appropriate command console, type the syntax in the command line as shown below, replacing the argument descriptions with the required values.

CAPublish under Windows

Purpose:	To publish Content Author resources ready for production without loading the Administration Client.
Preparation:	CAPublish is run from Content Author's client folder from a command prompt. The Content Author repository containing the required production resources must be accessible to the program.

Syntax:

`CAPUBLISH /u:`*`username`*` /p:`*`password`*` /JOB:`*`name`*

Parameters:

/u:	*username* identifies the user name for the repository. This setting is mandatory.
/p:	*password* associated with the user name. This setting is mandatory.
/JOB:	*name* of the publishing settings that was set in the Message Publishing wizard – see publishing settings on page 27.

The command line utility CAPublish can be run using a scheduler. The following outlines the steps to run a task using the Windows Scheduler.

▶ **To schedule CAPublish using Windows Scheduler:**

1. Click *Start/ Control Panel* and open *Scheduled Task*.
2. Double-click *Add Scheduled Task* and click *Next* on the Scheduled Task Wizard.
3. Click *Browse* to locate *CAPublish.exe*. The installation path, by default, is `c:\Program files\PBBI CCM\DOC1\Content Author\Admin` although this may have been changed at installation time. Click *Next*.
4. You can allocate a name to this task by overwriting the default program name. Then select an appropriate option to indicate when you want the task to be performed and click *Next*.
5. Indicate how often you want the task to run together with the start date and then click *Next*.
6. Enter your Windows user name and password details and click *Next*.
7. Check *Open advanced properties for this task when I click Finish*. Then click *Finish*.

8. In the resulting properties dialog box specify the publishing settings name to be published in the *Run* field.

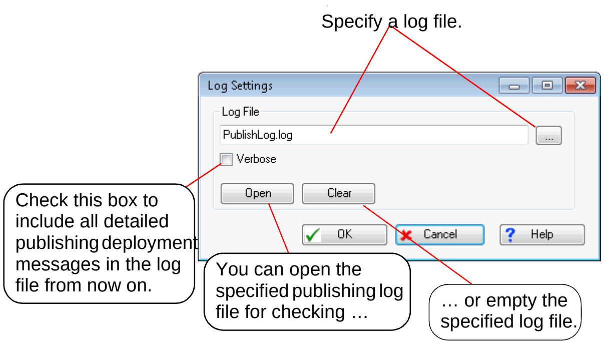
NOTE THAT YOU CAN CREATE A SCRIPT THAT CONTAINS MORE THAN ONE PUBLISHING SETTINGS NAME TO BE PUBLISHED AND ENTER THAT NAME HERE.

Working with the publishing log file

All publishing status information from publishing settings is recorded in a common log file which, by default, is located in the Content Author folder in your user temporary folder %temp%. You can monitor this file after each run and if necessary correct any issues before rerunning the job.

Using the *Log Settings* dialog box you can customize the file name and location. You can also delete all entries in a log file when they are no longer required.

▶ **To open the log file:** select *Tools/Publish Log Setting* from the menu.



Creating a production audit trail for messages

It may be important to your installation to keep a track of which Content Author messages were included in particular documents produced by the production runs. An audit trail feature is provided to assist with this.

The audit trail is an optional file produced by a Generate job. It is enabled when an audit trail file name is specified either as part of the publishing task in Designer or within an override setting file (OPS) supplied to Generate in the production environment itself.

When enabled Generate will output a record to the audit trail for each message included in a document. The records are added sequentially at the time the message is processed and recurring messages will produce multiple records. The records contain a fixed number of comma separated fields suitable for importing into spreadsheets and databases as required.

The record structure is as follows:

`Publication_Sequence_Number, Document_Sequence_Number, [User_Defined], Message_Area_Name, Project_Name, Folder_Name, Message_Name, Revision_Number`

The sequence numbers are in relation to job output. Publication numbers increment for each publication produced by the job. Document numbers are reset for each publication produced.

The *User_Defined* value can be specified by creating a *Set Customer ID* action within publication logic in the Designer. The value output is defined by the last such object to be processed before a message is included. If the value has never been set then this field will be blank.

All other values are attributes of the message itself as detailed in this guide.

Database reporting and problem management

Content Author provides a range of reports to help you manage messages and control objects. From time-to-time an administrator may need to review messages within the Content Author workflow and override the status where appropriate. An administrator may also want to create a snapshot to capture the current status of the Content Author database.

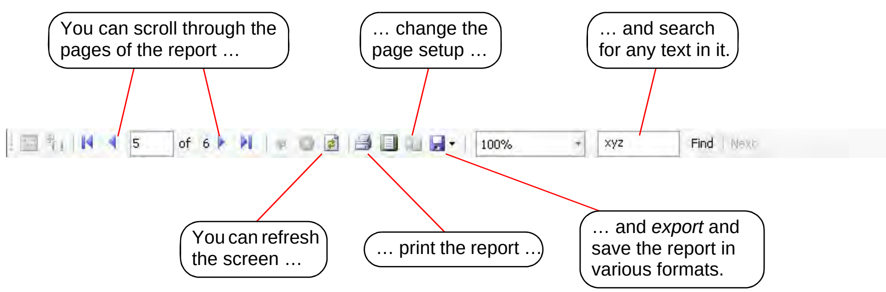
Generating reports

Administrators can generate reports for most configurable objects in Content Author. Such reports provide an inventory of object associations; for instance, you can create a report that shows the domains and messages associated with a message area. Project administrators are only able to generate reports for objects to which they have access.

▶ To generate a report:

1. Open the view for the object type you want to report on.
2. If you want to generate a report for a subset of objects select *Tools/Report On/Selected Items* from the menu otherwise select *All Items*.
3. The report will be generated and automatically displayed in the Report Viewer window.

   Use the toolbar to navigate through the pages of the report:



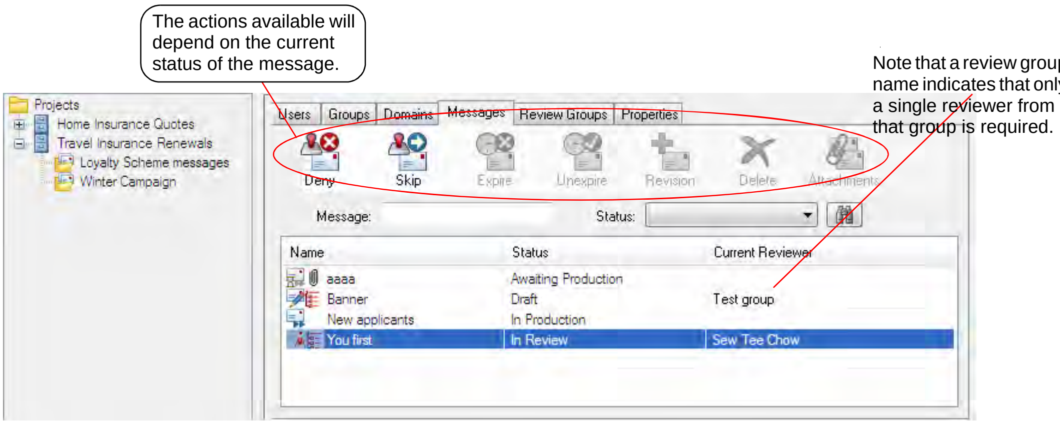
Managing message status

From time-to-time an administrator may need to override the status of a message within the Content Author workflow. For example, a message may be in review but the next reviewer in sequence is unavailable for an indefinite period.

▶ To override a message status:

1. Select *View/Projects* from the menu or click the projects icon 
2. In the navigator select the folder containing the message you want to work with.
3. Click the *Messages* tab.

4. Select the message to be amended and choose an action from the *Action* menu or select the appropriate button:



Creating a database snapshot

The snapshot feature allows you to capture the current state of all messages, resources and control objects currently in the Content Author database. It is used when you need to transfer resources to Pitney Bowes Software Support for analysis. Snapshot files are written to disk and logged in the Content Author repository. Using the Administration Client you can create and manage snapshots.

> SNAPSHOTS CANNOT BE USED FOR BACKUP OR VERSION CONTROL PURPOSES. TO DO THIS, USE SQL SERVER MANAGEMENT.

▶ **To work with snapshots:** select *Tools/Snapshots* from the menu.

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