pitney bowes

Customer Engagement

EngageOne® Compose

Content Author

User's Guide

Version 6.6 Service Pack 9

Contents

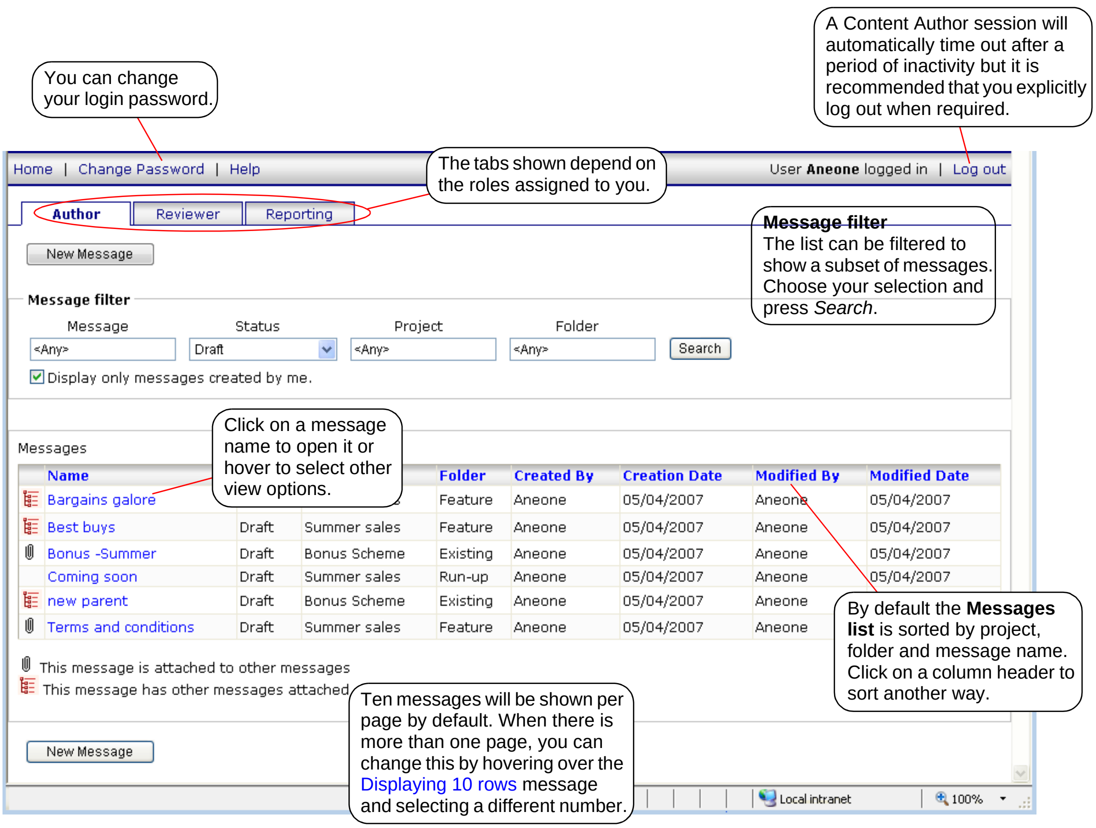
About the Content Author client

The Content Author client is used for creating, maintaining and reviewing *messages* that provide dynamic content for publications produced by Designer.

> FOR BACKGROUND INFORMATION ABOUT MESSAGES, DESIGN RESOURCES AND THE RELATIONSHIP WITH DESIGNER PUBLICATIONS PLEASE SEE THE CONTENT AUTHOR PRIMER.

Content Author is a web client that runs in your local browser. Authors, reviewers and readers use the same client although the views that are available will depend on the *roles* you are assigned.

To launch Content Author: enter the URL provided by your Content Author administrator into your web browser and the logon screen will be displayed. Enter your user name and password.



User accounts and passwords

The Content Author administrator is responsible for creating user accounts and the roles and permissions they identify. Your account will be assigned an initial password that you can change at any time. Contact your administrator if you forget your password or believe you need different levels of access.

▶ **To change your password:** select the *Change Password* option at the top of the Content Author home page. You will be asked to enter your existing password and then enter and confirm your new password. Click *Change* to save the password.

Time-out

By default a time-out is specified for Content Author which will disconnect you from your session after a long period of inactivity. In order to continue you will need to log in again. If you were currently editing a message any changes you made will be preserved locally and restored once you login again, but you should save them at the earliest opportunity.

Installing the Content Editor

The Content Editor is the part of Content Author that allows you to work with actual messages. If your installation was configured to install this as an ActiveX control, then you will be asked to install it on your computer when you first create or view a message. You may also be asked to install the control when the component has been upgraded on the Content Author server.

Working with messages

A message is the basic design object of the Content Author environment. It is a segment of page content intended to be placed within documents composed by Designer.

Messages are created and maintained by **authors** within a framework set up by the Content Author **administrator**. This includes the projects and folders to which messages are added and the message areas for which messages are targeted. The administrator may also create preview applications to allow you to see how your message will look in the context of the intended document design. **Readers** can view messages – their content and attributes, but cannot edit or change them.

Projects and folders

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.

Projects are typically used to organize messages according to the main Designer publications they will be used with. For example you might have projects for "Travel Insurance Renewals" or "Savings Account Statements". Folders typically group messages according to the same theme or project phase. For example, you might have folders for "Loyalty Scheme" or "Winter Campaign".

Work with your administrator to understand the projects and folders you need to use.

Message areas

Message areas represent reserved space in document designs for which messages are scheduled for inclusion. They can be thought of as rectangles that define the maximum size of an individual message.

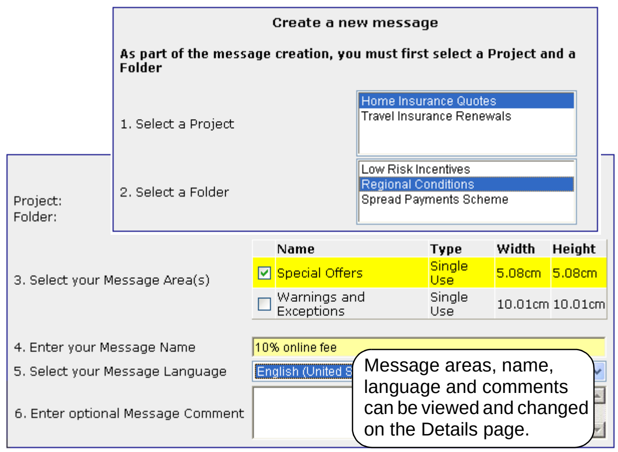
Messages occupy the entire width of the message area but not necessarily the entire height. Simple document designs may have a single message area to which a range of full size messages are conditionally applied. More complex designs may allow for a range of messages to be placed one after another in a single area until the available height is used up. A document design may also have more than one message area and you may be able to target a particular message at any or all such areas. Messages may also be inserted directly into the main flow of the document, where they will not be restricted to dimensions of the message area but will be the same width as the rest of the text. You will need to work with the administrator to establish the appropriate area for your message and its optimum size.

Languages

A message's language attribute is an additional selection criteria that may be used by some Designer publications to select only those messages suitable for a particular language. The language specified for the message is compared with the active Locale within the main application and the message can only be selected where there is a match.

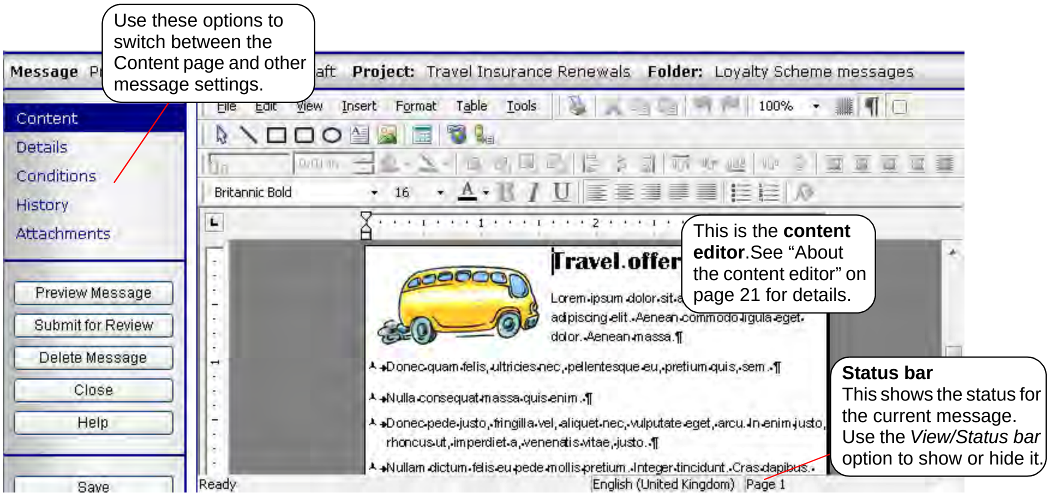
Creating and editing messages

Before creating a new message you must be aware of the project and folder to which the message needs to be added, the message areas to which it should be scheduled and, optionally, the language attribute to be applied to the message. Other attributes can be specified later.



To create a new message:

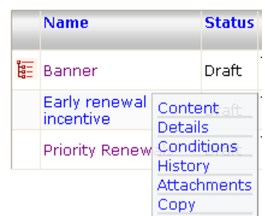
1. From the Author view in Content Author select *New Message*.
2. Select the *Project* and *Folder* you want the message to be included in and at least one *Message area*. Note that you may only be allowed to select a single message area depending on restrictions defined by the administrator. If required select a *Language* from the drop-down list. The message will then only qualify for inclusion when the Designer system locale uses that language. You can also enter a *Comment* as required.
3. Click *Create* to open the message in the editor.



▶ **To work with an existing message:** click on a message name in the Content Author home page. The *Content* page is loaded by default;

– or –

hover over a message name in the Content Author home page and select the page you initially want to work with.



▶ **To save a message:** in the editor, select the *Save* option;

– or –

use the *Save as* option to save the message with a new name. Changes made since the message was last saved will only be in the new copy.

▶ **To copy a message:** hover over the message name in the Content Author home page and select *Copy*. Enter a new name for the copy and, if appropriate, choose whether to include its attachments.

▶ **To delete a message:** click on the required message in the Content Author home page to open it in the editor. Select the *Delete message* option and confirm the deletion.

Submit for review

When a message is created or amended the author must submit it for review. Before a message can be deployed for production it must be approved by all the reviewers assigned by the administrator to the project to which it applies. You can see who the reviewers for a particular message are on the Details page of the content editor.

> ⓘ FOR FULL DETAILS OF THE REVIEW AND APPROVAL CYCLE SEE “THE REVIEW PROCESS” ON PAGE 54.

If a reviewer denies a message the review cycle is stopped and the author is informed by e-mail.

▶ **To submit a message for review:** in the Content Author home page open the required message in the editor and select the *Submit for review* option.

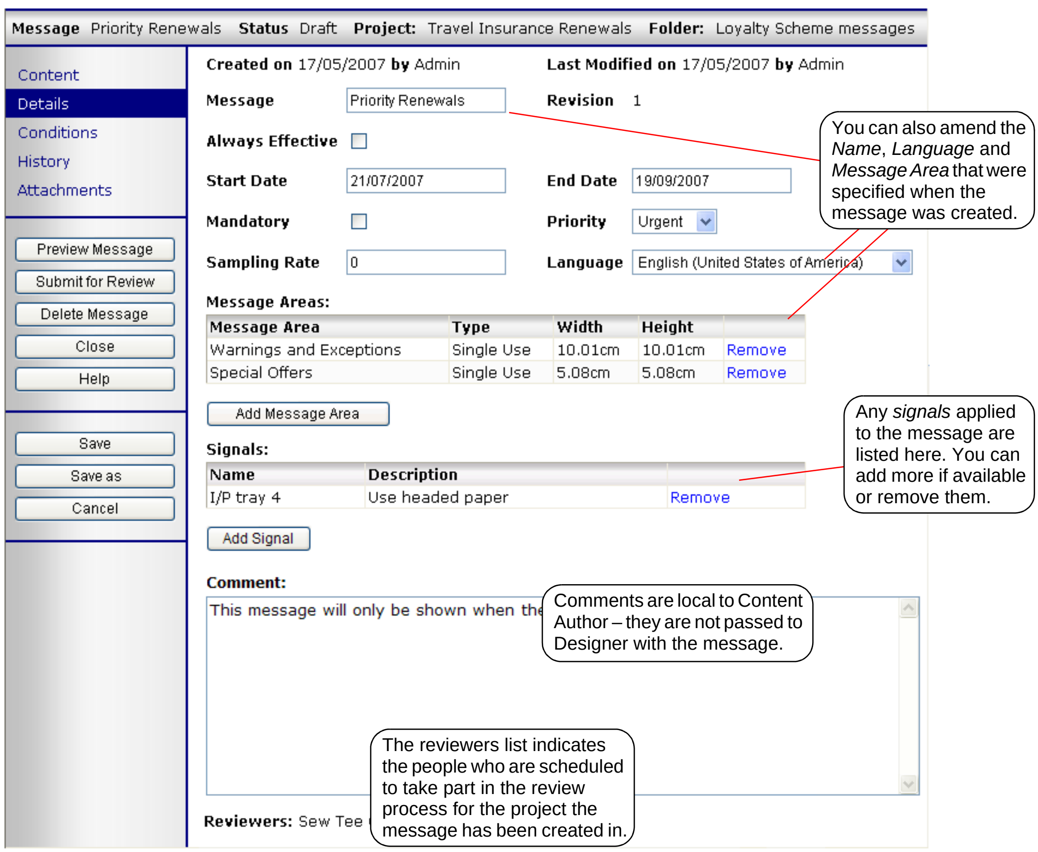
Reviewers are informed by e-mail when a review is required. You can track the review process using the History tab for the message.

Managing Message Properties

After a new message has been added you can use the *Details* tab to add or amend the message properties. Note that certain message properties such as *Mandatory, Sampling Rate, Signals* etc. may not be available depending on restrictions defined by the administrator.

> NOTE THAT A READER CAN VIEW MESSAGE PROPERTIES BUT CANNOT EDIT OR CHANGE THEM.

To work with message properties: click on a message name in the Content Author home page to load it into the content editor then click the *Details* tab. Specify the properties as required. See the following sections for details.



Signals

> Note that a reader can view signals but cannot edit or change them.

A signal assigned to a message 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 to use headed paper from a specific input tray on the printer. Provided that signals are available for a message, you can add more than one to a message and the same signal can be assigned to more than one message. The name and description indicate what the effect of the actions will be. Contact your Content Author administrator for more information.

Note that you can only add and remove signals if the message status is *draft* or *not approved*.

Priority

> See "Using Conditions" on page 15 for details of how conditions are used to include or exclude specific message. Refer to the Content Author Primer for information about selection criteria in general.

Messages are selected for inclusion in specific documents according to a range of criteria – most notably conditions. At production run-time several messages may be valid for the same message area in a particular document. In such circumstances the priority of the message determines the order in which the Designer publication will attempt to place messages in the space available.

The priority categories that are available are determined by the Content Author administrator. There will always be a *Default* priority which is automatically assigned to new messages unless you change it. This indicates the message has no particular priority requirement and will be selected after messages with specific priorities have been dealt with.

▶ **To set the message priority:** when editing a message, select the *Details* tab and choose the required priority level from the *Priority* list.

Mandatory messages

Messages can also be defined as *Mandatory* which indicates that the message must always be included in any document for which they are valid according to selection criteria. If a mandatory message cannot be placed in a document for which it is valid Generate will take the action defined by the administrator. Use this setting with care: by default the application will abort at this point although other options are available.

▶ **To make the message mandatory:** when editing a message, select the *Details* tab and select the *Mandatory* option.

Sampling rate

The sampling rate restricts the maximum number of times an individual message may be included in any single production run of a publication. For example, if the sampling rate is set at 500, the message will be included for a maximum of 500 times only, even if the rules and conditions allow the message to be included more than this. This may be useful for instance, where you want to limit the number of times a particular offer is made to your customers. The default rate is 0, meaning there is no restriction.

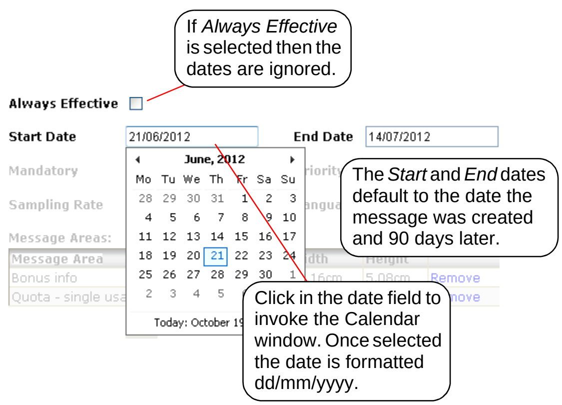
Specifying Effective Dates

It may be important to specify the dates between which a message is valid and can be included in documents. For example, if the message includes details of a special offer there may be an expiry date for the offer. In this case it is important that the message is not included in a production run after the offer has expired.

When a message is created, by default, no such date restrictions are applied.

To set effective dates:

1. While editing a message, select the *Details* tab.
2. Select *Always effective* if you require the message always to be included in production runs, disabling the *Start Date* and *End Date*.
   – or –
   enter the required dates in the *Start Date* and *End Date* fields – in the format dd/mm/yyyy – or click in either data field and use the calendar to select the dates.



Using Conditions

Messages are selected for inclusion in specific documents according to a range of criteria. Some criteria are generalized such as where the language attribute or effective dates are used. Where you want to use specific criteria you will need to include one or more conditions in a message.

> NOTE THAT A READER CAN VIEW CONDITIONS BUT CANNOT EDIT OR CHANGE THEM.

Conditions can be used either specifically to select a message for inclusion or specifically to exclude it. An individual message can contain multiple *Select-if* or *Exclude-if* conditions. You can choose if the action applies when either one or all conditions are satisfied in each category. If both *Select-if* and *Exclude-if* conditions are specified for a single message *Exclude-if* will win if both categories are satisfied

Each condition must include one or more comparison statements that compare the value of a particular data field with another value. For example, you may have a comparison that looks for the string "South-East" in the Area data field or where Balance field has a value greater than 100. Where multiple statements are coded you can choose whether any or all of the comparisons must be satisfied for the condition to be true.

> DATA FIELDS ARE LINKS TO VALUES PROVIDED BY THE MAIN PUBLICATION DESIGN AND WILL TYPICALLY PROVIDE VARIABLES SUCH AS CUSTOMER NAME, DATE OF BIRTH, AND SO ON. THEY ARE MADE AVAILABLE BY THE ADMINISTRATOR. DATA FIELDS CAN ALSO BE USED AS PART OF THE ACTUAL MESSAGE CONTENT.

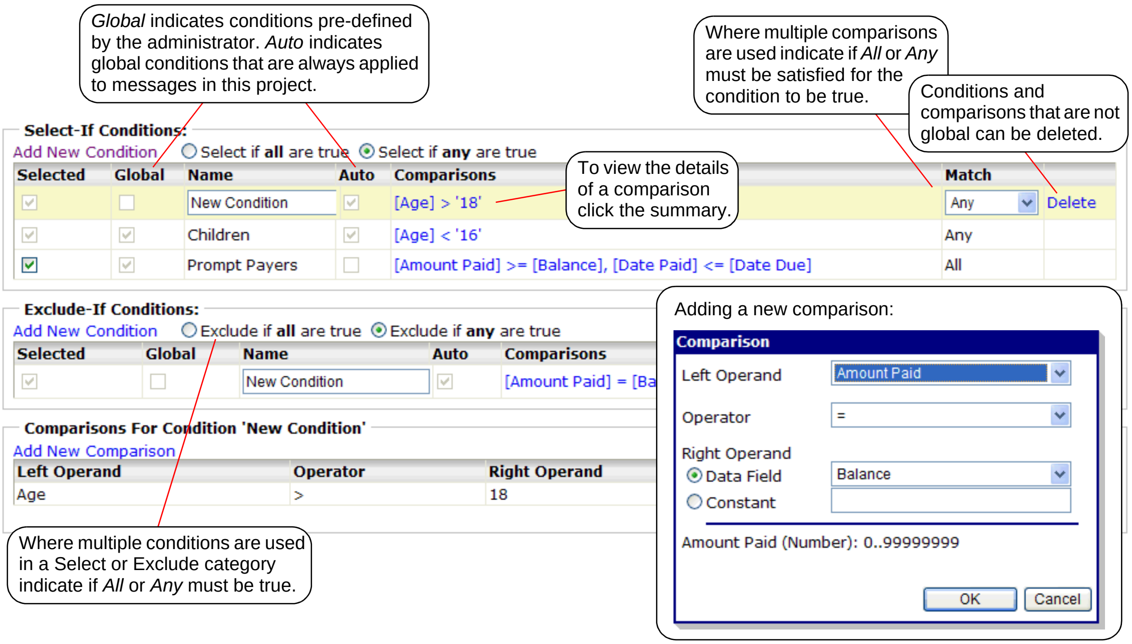
The administrator may have applied pre-defined global conditions to the project you are working on. Additionally the administrator may also flag one or more such conditions as *Auto* which means they are automatically applied to all messages within the project. Where this is not the case you may choose to apply such conditions as required or create new ones.

To apply existing conditions to a message: while editing a message select the *Conditions* tab. The available conditions are listed for both the *Select-if* and *Exclude-if* categories. Check the conditions you want to use with the message. Note that 'auto' conditions are automatically selected.

To create a condition:

1. While editing a message, select the *Conditions* tab.
2. In either the *Select-if* or *Exclude-if* category click *Add New Condition*.
3. Add comparisons.

   In the Comparisons section click *Add New Comparison*. Complete the dialog fields. Repeat for other comparisons if required.


Global indicates conditions pre-defined by the administrator. Auto indicates global conditions that are always applied to messages in this project.
Where multiple comparisons are used indicate if All or Any must be satisfied for the condition to be true.
Conditions and comparisons that are not global can be deleted.
Select-If Conditions:
Add New Condition
Select if all are true
Select if any are true
To view the details of a comparison click the summary.
Selected
Global
Name
Auto
Comparisons
Match
New Condition
[Age] > '18'
Any
Delete
Children
[Age] < '16'
Any
Prompt Payers
[Amount Paid] >= [Balance], [Date Paid] <= [Date Due]
All
Exclude-If Conditions:
Add New Condition
Exclude if all are true
Exclude if any are true
Selected
Global
Name
Auto
Comparisons
New Condition
[Amount Paid] = [Ba
Comparisons For Condition 'New Condition'
Add New Comparison
Left Operand
Operator
Right Operand
Age
>
18
Where multiple conditions are used in a Select or Exclude category indicate if All or Any must be true.
Adding a new comparison:
Comparison
Left Operand
Amount Paid
Operator
=
Right Operand
Data Field
Balance
Constant
Amount Paid (Number): 0..99999999
OK
Cancel

Attachments

> NOTE THAT A READER CAN VIEW ATTACHMENTS BUT CANNOT EDIT OR CHANGE THEM.

An attachment is a message that is associated with another 'parent' message. Attachments keep associated messages together within the Content Author review cycle and ensure that they only appear when their parent is placed in a document. For example, you may want to use attachments where you have a range of messages containing the text of terms and conditions relating to a special offer but you only want one of these to appear in a document when the offer to which they relate has already been placed.

It is important to note that the attachment attributes themselves do not guarantee that the attached message will appear when its parent is selected or be within the same message area. An attachment must have message areas assigned in the normal way and is subject to regular selection criteria including conditions, priority, language, and so on. You must ensure the criteria permit an attachment to be selected when its parent is placed in a document.

An attachment differs from a regular message in the following ways:

- An attachment will only be selected for a document when its parent has already been placed.
- The effective dates and sample rate attributes are assumed to be the same as the parent unless these are specifically defined for the attachment.
- The effective date of an attachment must be within the range specified for its parent (the actual range specified for the attachment may be different provided it is within this range).
- In the production system attachments will be selected ahead of other messages with the same priority.

Additionally a parent record differs from a regular message because:

- It cannot be approved while any of its attachments are in review.

Messages can have one or more attachments associated with them, and more than one message can use the same attachment. Both message and attachment must be in the same project folder. An attachment cannot itself have an attachment.

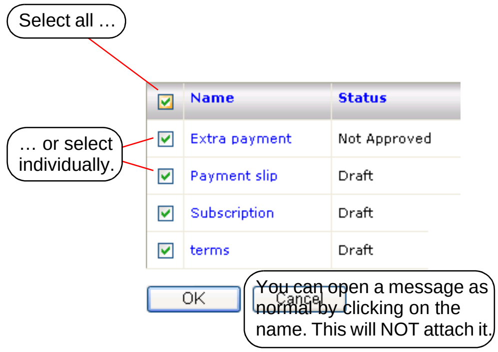
▶ **To list and work with attachments for a message:** while viewing or editing the message click the *Attachments* tab.

▶ **To attach the message to other messages:** click *Add as attachment*, and select the required messages from the *Attachments* window and click *OK*.

▶ **To attach the message to a new message:** select *Add as attachment to new message* to create a new parent message. The new message will be loaded in the editor. The original message will automatically be attached to the new message.

▶ To add attachments to the message: click *Add attachment*. The *Attachments* window will list available messages that can be used as attachments. Select the messages you want to attach and click *OK*.

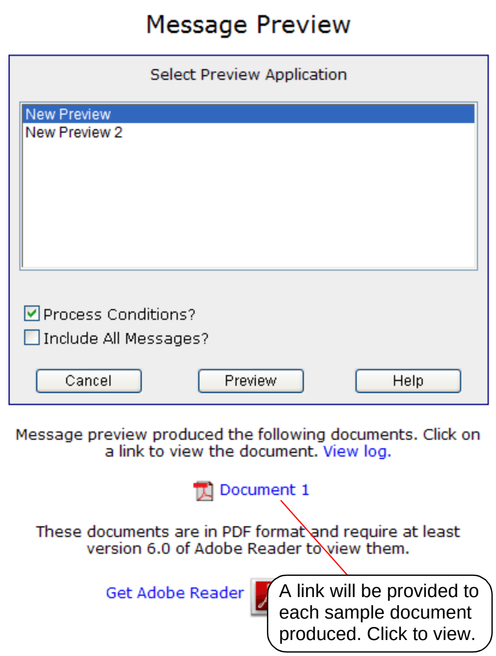
▶ To create a new attachment for the message: click *Add new attachment*. The new attachment message will be loaded in the editor and will automatically be attached to the original message.



Previewing

You may be able to preview message content within the context of sample output from the Designer publication for which it is intended. This option is only available when the administrator has previously set up a preview application suitable for your project. You can, if required, use the conditions associated with the message as part of the process but note that this may result in the message being excluded in some sample documents.

A message preview should produce one or more PDF files each containing a document output by the application. The number of documents is determined by the sample data assigned by the administrator.



▶ To preview a message:

1. While editing a message select the *Preview Message* option.
2. Choose the application you want to preview from the list.
3. Choose whether or not to process the conditions associated with the message and whether to include all messages from the same folder.
4. Click *Preview*. When they are ready the preview documents will be listed for you to open in Adobe Reader.

Reports

Reports can be generated that list messages in specific review states and categories. Only messages that are in the projects to which you are assigned will be included in the report.

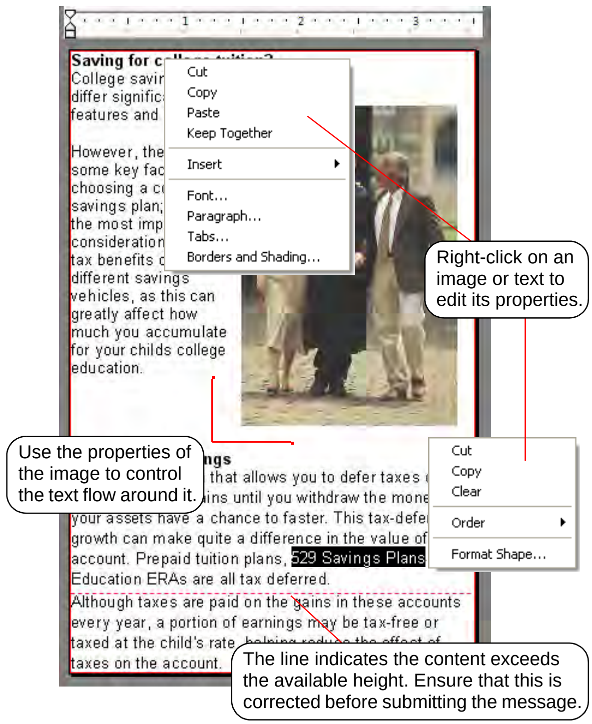
▶ **To generate a report:** in the editor click the *Reporting* tab and select the type of report you require from the list. Then select the criteria you want for the report and click *View Report*. The report will be generated and displayed in the *Message Report Viewer* window.

About the content editor

The content editor is where the actual messages that will appear within document pages are viewed and designed. It includes standard text editor features plus some tools that deal specifically with messages. Authors can edit more than one message at the same time – each will appear in a separate window. The layout of the menus and toolbars can be customized to some extent. Readers can only view messages and their attributes; they can't change them in any way.

A message can contain text and graphics, and the size of the workspace in which you create it represents the size of the message area that has been selected for the message. Where multiple areas are selected the largest width and height is represented. Remember that document designs often expect more than one message in a message area so while your message will always occupy the entire width of the area it does not necessarily have to occupy the entire height.

Note that not all editing features may be available to every author.



Borders and shading

Borders and shading can be applied to a message area but note that this will force the message to occupy the height of the entire area.

▶ **To apply borders and shading to a message area:** on the *Format* menu select *Borders and Shading*.

▶ **To zoom in or out of the edit area:** from the *View/Zoom* menu and select *Zoom in* or *Zoom out*. You can also change the zoom percentage in the toolbar.

Design Resources

Resources such as fonts, images, data fields and so on must be added to the Content Author repository by an administrator before they can be used with messages. Content Author also provides administrators the ability to restrict the design resources that can be used with messages in particular projects and folders. Such restrictions are referred to as a *domain* and are often used to ensure a common style across messages and the overall document design.

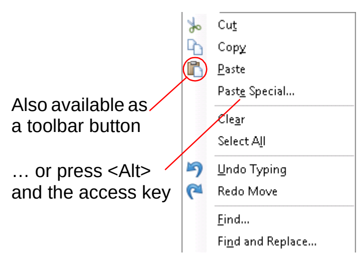
Editing features

The editor provides standard editing features that enable you view and to create messages. The menus and toolbars give you access to all the editing options. The layout of these can be customized to some extent.

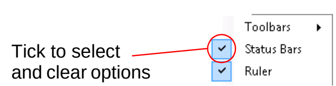
Text and graphics can be copied and moved by selecting it and using the clipboard as a temporary store for it. If you make a mistake when editing, you can retrace your steps using the undo and redo options.

Menus and toolbars

The menu gives you access to most of the editor functions and commands. You will also be able to access many of these using the toolbar buttons or keyboard access keys, both of which will be shown on the menu. Note that you may have to press the <Alt> key in order to see the access keys.

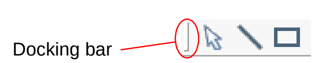


Buttons are grouped together into a range of separate toolbars that cater for a particular group of editor functions. You can hide toolbars that you don't need to work with to simplify the layout, or to make more space for the editor window. For instance, if your design does not include any shapes you may want to hide the drawing toolbar. You can also move the toolbars in relation to one another to suit your own style of working.



▶ **To hide or display a toolbar:** on the *View* menu click *Toolbars* and then clear or select the relevant toolbar check box.

▶ **To move a toolbar:** drag its docking bar to a new position.



Measuring and positioning aids

You can customize the unit of measure (UOM) used by the editor to suit your requirements. The UOM specified is used in rulers and coordinate displays.

The preferred UOM is also used as the default in dialogs that require a measurement although you can override this as required. You can specify a different UOM simply by adding one of the following abbreviations after the number.

UOM	Specify	Example
inches	in	2.1 in
centimeters	cm	1.2 cm
millimeters	mm	32 mm
points	pt	12 pt
picas	pi	2 pi

The on-screen **rulers** help you with positioning objects accurately. The top ruler is also used when setting tab stops and indents for paragraph text. You can turn off the ruler display if required by using the *View/Ruler* option.

For information about setting tab stops and indents using the ruler see “Positioning text” on page 31.

You can also use the **grid** to help with placement. You can set the grid size to your preference and optionally have graphics snap to grid intersections when you are creating or moving them.

▶ **To set all grid, ruler and UOM preferences:** from the *Tools* menu select *Options* and apply settings as required.

▶ **To override ruler settings and UOM:** right-click on the ruler and select from the drop-down list.

▶ **To turn the grid on and off:** click on the *Toggle Grid* button
– or –
on the *View* menu click *Grid*.

Selecting text and graphics

When you want to move, delete, or overwrite design elements you must first select what you want to work with. You can do this either by using the mouse or via the keyboard, refer to “Keyboard shortcuts” on page 25 for further information.

▶ **To select text and graphics using the mouse:** use one of the following shortcuts:

Anything:	drag across it from beginning to end.
A word:	double-click in it.
A paragraph:	triple-click in it.
Start a selection:	click at start of selection.
End a selection:	hold down SHIFT and click at end of selection.

▶ **To cancel a selection:** click anywhere else on the page or press any arrow key.

▶ **To delete selected elements:** use the *Delete* key on the keyboard or click *Clear* from the Edit menu.

Using the clipboard

You can copy, cut and paste design elements using the system clipboard. This is an easy way of transferring content both within the editor and to and from other applications.refer to “Keyboard shortcuts” on page 25 for further information.

Undo and redo

If you create, edit or format a design element by mistake, you can reverse the action by using the *Undo* command. Similarly, if you undo an action by mistake, you can use the *Redo* command to switch back again. You can undo actions progressively, each time restoring to the state before the previous change was made, up to a limit of 10 previous actions.

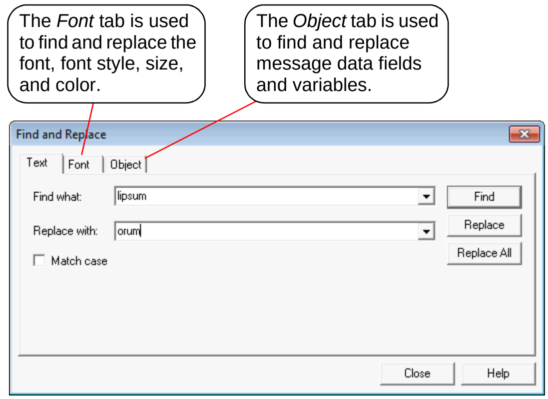
▶ **To undo an action:** click the *Undo* button
– or –
on the *Edit* menu click *Undo*. Note that the action that will be canceled is shown in the *Undo* command.

▶ **To reverse an undo action:** click the *Redo* button
– or –
on the *Edit* menu click *Redo*. Note that the action that will be reversed is shown in the *Undo* command.

Find and replace

You can search and make changes to text, fonts and data fields in a message by using the find and replace feature. You can replace specific instances or change every occurrence within the message. Note that not all features may be available to every author.

▶ **To find and replace:** from the *Edit* menu select *Find and Replace*. Select the relevant tab to search for *text*, *fonts* or *objects*.

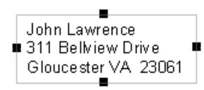


Boundary indicators

You can optionally choose to show the outline of layout areas such as text boxes, address blocks, charts and so on. Boundaries are indicated by a grey outline around the layout area.

▶ **To switch boundaries on and off:** click the ☐ toolbar button
– or –
from the *View* menu choose *Show Boundaries*.

Note that by default boundaries are switched on.



Select the object by clicking anywhere in the layout area or on its border.

Keyboard shortcuts

You can use keyboard shortcuts to move the focus to a frequently used menu option or command without using the mouse. This section lists the keyboard shortcuts available in the content editor.

▶ **To access toolbar options:**

Select magnification from the zoom box:	CTRL+SHIFT+Z
Select font size from the size box:	CTRL+SHIFT+P
Select the font from the font box:	CTRL+SHIFT+F
Select text color options:	CTRL+SHIFT+C

To exit from the toolbar controls, press the “Esc” (Escape) key.

To select paragraph design elements**:**

A character to the right:	SHIFT + →
A character to the left:	SHIFT + ←
A line before:	SHIFT + ↑
A line after:	SHIFT + ↓
To end of line:	SHIFT + END
To beginning of line:	SHIFT + HOME
All	CTRL + A or on *Edit* menu click *Select All*

To use the clipboard:

Copy selected text and graphics onto the clipboard:	on *Edit* menu click *Copy* or press  or CTRL+C
Move (i.e. copy and delete) selected text and graphics onto the clipboard:	on *Edit* menu click *Cut* or press  or CTRL+X
Paste contents of the clipboard into the message:	on *Edit* menu click *Paste* or press  or CTRL+V
Paste contents of the clipboard, such as content from a spreadsheet or PDF into the message:	on *Edit* menu click *Paste Special*. If applicable, select the format you want to use to paste the contents and click *OK*.

To navigate through browser frames:

Move to Next Frame:	F6
Move to Previous Frame:	SHIFT + F6

Creating paragraphs

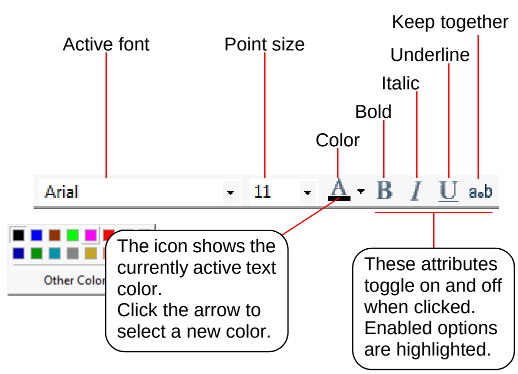
Entering and formatting text

Paragraphs are created simply by typing with the insertion point positioned in the message. A new paragraph is automatically created when you press the return key. You can also create new paragraphs by double-clicking in any open space below the previous paragraph in the message.

Text will automatically wrap onto new lines when the available width is exceeded, using hyphenation when specified, although you can force particular text strings to be kept together on the same line if required. Pressing the Shift and Return keys together forces a new line without creating a new paragraph.

When you start typing, the text is created using the active format – the font being used, its style, color and so on. You can change the format at any time or amend the format of existing text as required. Note that when you move the insertion point into existing text, the current format will be picked up from the text to the right of the insertion point. You can, of course, change the format before typing. Note that not all features may be available to every author.

Text attributes are normally specified using the text formatting toolbar. Note that you can specify a global default font – see “Default editor font” on page 28.



Changes to the formatting of text will be applied to any highlighted text, or, if none is highlighted then to any new text that is entered at the insertion point.

▶ **To show the text formatting toolbar:** select *View/Toolbars/Text Formatting* from the menu.

▶ **To adjust the formatting of text:** highlight the text to be changed and either use the text formatting toolbar options
– or –
on the *Format* menu click *Font*. This will invoke the *Font* dialog box where you can format the selected text.

▶ **To stop a line breaking at a space:** use Shift+Ctrl+Space to insert a non-breaking space character.

▶ **To keep text together:** highlight the relevant text and on the *Edit* menu select *Keep together*
– or –
use the *Keep together* button on the text formatting toolbar.
This replaces all spaces with non-breaking spaces to keep as much of the text as possible on a single line. Hyphenation will not be applied. Note that the *keep together* attribute will remain in force and be applied to all new text until specifically cleared.

> IF YOU APPLY *KEEP TOGETHER* TO A DATA FIELD IT WILL BE APPLIED TO ALL THE TEXT INSERTED BY THE DATA FIELD.

Right to left text entry

The default direction of paragraph text is determined by the active Windows input language (see “Changing the input language” on page 28). This is generally left to right, but for languages such as Arabic, would be right to left.

When the direction is right to left, text is entered using the keyboard in the same manner as if typing left to right text. Paragraphs can include bidirectional text and you must ensure that the direction of the paragraph is correct.

▶ **To set the direction of a paragraph to right to left:** invoke the corresponding *Paragraph* dialog box. Under *Presentation* set the *alignment* as required and the *direction* to *right to left*.
– or –
use the *Right-to-left* button on the Text formatting toolbar.

Default editor font

The editor’s default font is used for text entered in messages. The default font is set using the *Options* dialog box and enables you to choose the font, point size etc.

You can use the formatting toolbar to change font attributes without affecting the default font. Changes made to the default font do not affect the text in existing messages.

▶ **To change the default font:** select *Tools/Options*. Click the *Edit* tab and choose the required font.

Changing the input language

The input language controls how characters will be mapped to the font used within an output datastream – i.e. the code page to be used. Normally the intended language of text is automatically assumed from the active Windows input language when characters are entered. In some exceptional circumstances this may not be the case and you will need to set the intended language for specific text. You can use the Unicode Language option for complex scripts and languages that do not map to a standard Windows character set.

▶ To set the language of existing text: highlight the text you want to change and select *Tools/Set language*. Select a supported language and click *OK*.

> When creating your message ensure that you have the correct input language set or you may be unable to select some language specific fonts in the editor.

Changing the language mapping

Normally the default encoding for an input language is sufficient. However, there may be situations when you may want to change that encoding, for instance to view a field from a data format that uses a different encoding scheme to the one used by the publication. This option is only used for viewing content in the Content Editor and is done to prevent the Windows operating system from automatically substituting fonts in a publication.

An additional option is available for changing the language mapping when text is entered in the Content Editor using a Windows Input Method Editor (IME). If this option is selected when characters are entered into a message using the IME, the characters displayed in the message will use the mappings that correspond to the custom code page in the Designer and not the character set associated with the language and font of the IME.

▶ To change the language mapping:

> Changing the encoding for one language, may impact a number of other languages that share the same encoding. These languages are displayed in the *Affected Languages* list.

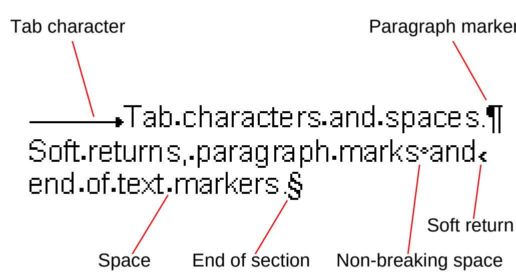
1. Select *Tools/Options* and select the *Language/Encoding mapping* tab.
2. Select the language you want to change and click *Modify*.
3. Select the code page you want to use from the *Encoding* list and click OK.
4. The new mapping is now displayed in the *Options* dialog box. Click *OK*.

▶ To use custom code pages for keyboard entry: select *Tools/Options* and select the *Language/Encoding mapping* tab and click the *Use custom code pages for keyboard entry* option.

▶ To reset the language mapping: select *Tools/Options* and select the *Language/Encoding mapping* tab and click *Reset All*.

Formatting marks

Formatting marks are non-printing characters that indicate controls within paragraphs such as end markers, spaces, tab characters and so on. Displaying them shows you exactly what you have typed and can help to highlight layout problems, for example, where you have



typed several spaces rather than a tab character. Hiding them shows you more how the finished message might look. Even if formatting marks are showing, they will not be in the final output.

▶ **To show/hide formatting marks:** click the *Formatting Marks* button or select *View/Show all Paragraphs* to switch them on or off.

Hyphenation

The Designer document in which messages are to be placed may have hyphenation switched on and this will automatically be applied to the messages as they are included by Designer. However you can override this for any paragraph in the message. Note that hyphenation is not shown in the editor but may be seen when previewing the message – see “Previewing” on page 18.

▶ **To turn off hyphenation for a specific paragraph:** select the relevant paragraph and on the *Format* menu click *Paragraph*. In the *Presentation* section of the *Paragraph* dialog box select the *Don’t hyphenate* option.

Spell checking

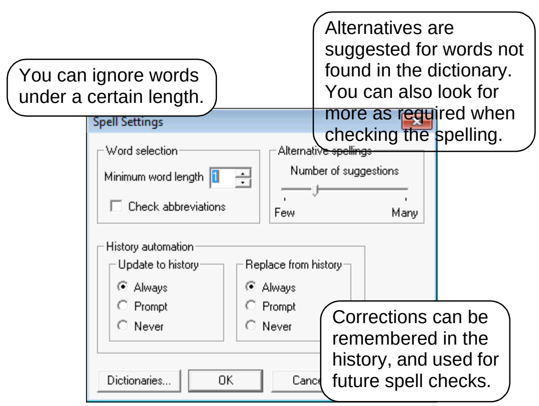
Spell checking is performed using the dictionary associated with the language of the text. You can change this dictionary if required to use a specific variant of the language – subject to your license keycode.

If text is selected, then only this will be checked, otherwise, all text will be checked. You can customize the way the spell checker works by changing the spell settings – for instance, whether to check abbreviations, whether to remember previous changes.

▶ **To run the spell checker:** on the *Tools* menu select *Spell check*.

▶ **To change the spell settings:** on the *Tools* menu select *Spell settings* and change the settings as required. Click *Dictionaries* to change the dictionary used for specific languages.

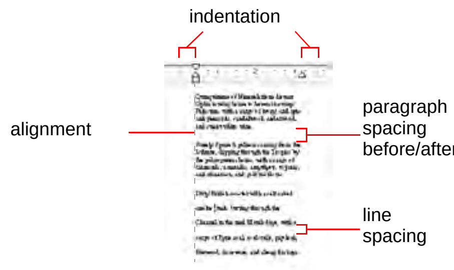
▶ **To change the language:** on the *Tools* menu select *Set language* and choose the required language. This will be used for the selected text. or, if none is selected, for the complete message.



Positioning text

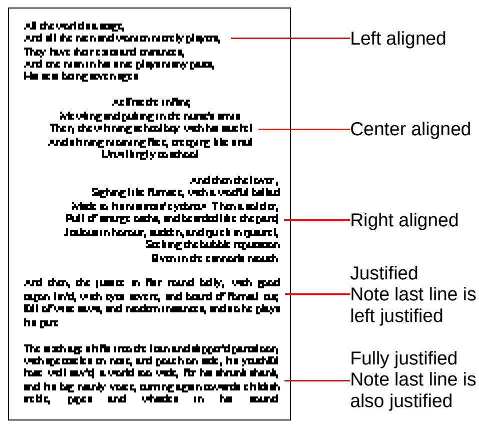
Paragraphs are positioned in relation to one another and the edges of the message area. You can customize how they are aligned (or justified) between the left and right edges, any indentation to be used from those edges, the line spacing within individual paragraphs and the gap required between adjacent paragraphs.

Tab stops can also be used to align text within a paragraph.



Paragraph alignment

Paragraphs are aligned between their left and right indentations – shown as ⌂ on the ruler. Alignment is applied to the whole paragraph, so if you want a different layout for certain lines, you must create a separate paragraph for them.



▶ **To align a paragraph:** use one of the following buttons on the Text Formatting toolbar:

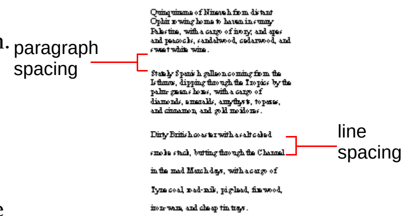
- Left
- Centered
- Right
- Justified
- Fully justified

– or –

on the *Format* menu click *Paragraph*. In the *Presentation* section of the *Paragraph* dialog box set the required *Alignment* option.

Spacing

You can specify both space before and after a paragraph, and space between lines within a paragraph.



For paragraphs you can specify both the amount of space to be inserted after the preceding paragraph, and the amount of space before the following paragraph. If consecutive paragraphs have conflicting 'before' and 'after' values then the greater value will be used – for example if two paragraphs have the space above set to 0.1″ and the space after set to 0.2″, then the paragraph spacing will be 0.2″.

Line spacing determines the space between the lines within a paragraph.

Single: represents the standard amount of line spacing for the largest font in the paragraph. *1.5 lines* and *Double* are increments of this default.

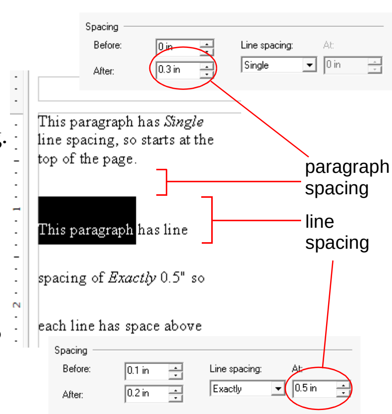
Multiple: as for *Single*, but uses the value specified as a multiple of the line, e.g. 1.2 will increase the line spacing by 20%; 0.8 will decrease it by 20%.

At least: lines will be spaced by at least the specified amount, but will be more as required by the content of each line.

Exactly: lines are spaced using the specified value, regardless of the size of the content of a line.

> ⓘ NOTE THAT ONLY *EXACTLY* WILL SPACE ALL THE LINES IN THE PARAGRAPH THE SAME. ALL OTHER SETTINGS CAN PRODUCE DIFFERENT LINE SPACINGS WITHIN A PARAGRAPH DEPENDING ON THE CONTENT OF EACH INDIVIDUAL LINE, FOR EXAMPLE IF THERE IS AN INLINE GRAPHIC.

Line spacing is measured from the bottom of the line upwards, so if you specify a value in *At* that is much larger than the font, the additional space is above the line. This can affect the gap between paragraphs as the paragraph spacing is applied in addition to line spacing.

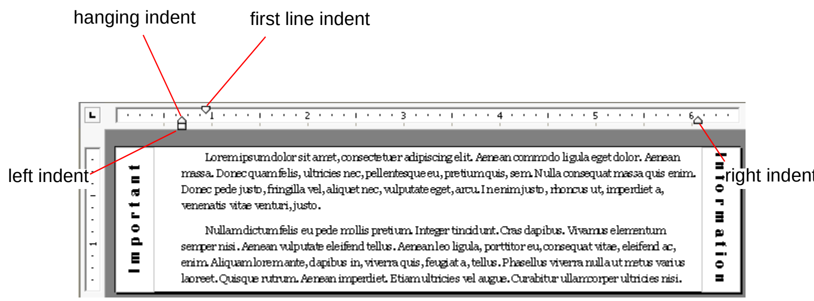


Paragraph and line spacing should be used in preference to inserting blank paragraphs between text, as it gives more control over the overall layout in the message. For instance, if a paragraph doesn't quite fit you may be able to reduce the paragraph spacing and the line spacing so that it does – say by using *Multiple* to reduce the line spacing by a small amount, e.g. 0.7 of a line.

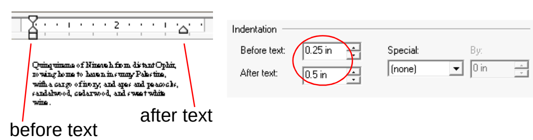
▶ **To adjust paragraph or line spacing:** on the *Format* menu click *Paragraph*. In the *Paragraph* section of the *Paragraph* dialog box set the required *Spacing* options.

Indentation

Paragraphs are, by default, positioned at the left and right edges of the message. However, you can specify a gap between these edges and the paragraph by applying indentation.

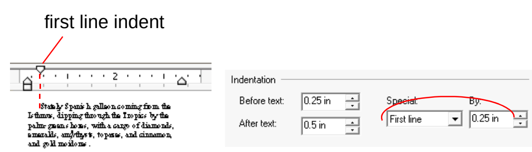


▶ To indent a paragraph: move the left and right indent markers on the ruler to the required positions
– or –
on the *Format* menu click *Paragraph*. In the *Indentation* section of the *Paragraph* dialog box set the *Before text* and *After text* indentation.



Indenting the first line

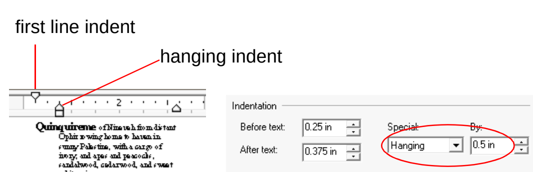
You can indent the first line of a paragraph in relation to other lines it contains.



▶ To indent the first line: move the first line indent marker on the ruler to the required position
– or –
on the *Format* menu click *Paragraph* and select *First Line* from the *Special* indentation drop-down list. Enter the amount to indent in the *By* field.

Hanging indent

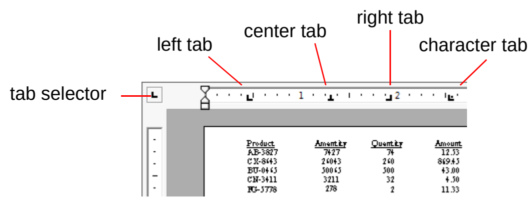
A hanging indent is where all lines except the first one are indented. The hanging indent is measured from the left, or first line indent.



▶ **To create a hanging indent:** move the hanging indent marker on the ruler to the required position
– or –
on the *Format* menu click *Paragraph*. Select *Hanging* from the *Special* indentation drop-down list. Enter the amount to indent in the *By* field.

Tab stops

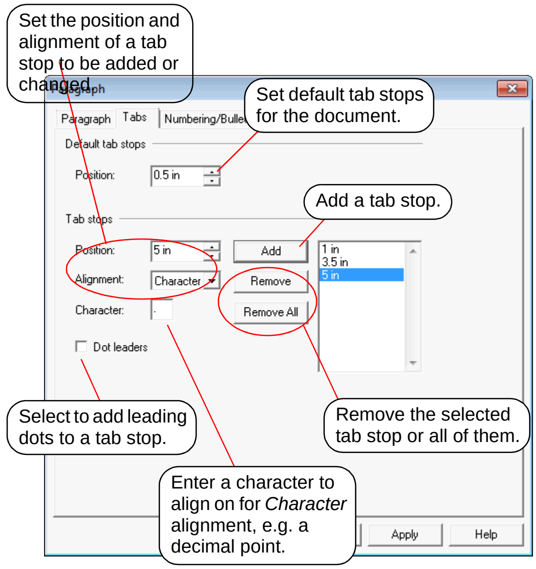
Any number of tab stops can be specified in a paragraph. They can be left, right, centered, or aligned on a character. A character tab will align on the first occurrence of the specified character. If this is not in the text, then a tab the same as the paragraph justification will be used.



If there are no tab stops specifically set in a paragraph, then, by default, tab stops will be set at regular intervals on the ruler. These will be the same as the paragraph alignment, e.g. right tabs in a right aligned paragraph.

Tab selector	Tab stop
	left
	centered
	right
	character

▶ **To insert a tab stop:** click the tab selector on the ruler until the required tab stop is shown. Then click on the ruler at the position where you want to place the tab stop. The tab stop will be inserted on the ruler
– or –
on the *Format* menu click *Tabs*. The *Tabs* page of the *Paragraph* dialog box will be displayed. Specify a tab stop and click *Add*.



▶ **To move a tab stop:** either select the tab stop on the ruler and drag it to its new position
– or –
on the *Format* menu click *Tabs*, select the relevant tab stop from the list and enter the new position under *Tab Stops/ Position*.

▶ **To modify an existing tab stop:** on the *Format* menu click *Tabs*, select the tab stop from the list and change its *Alignment*, *Character* and *Dot leaders* as required.

▶ **To remove a tab stop:** either select the tab stop on the ruler and drag it off the ruler
– or –
on the *Format* menu click *Tabs*, select the tab stop from the list and then click *Remove*, or click *Remove All* to delete all tab stops.

▶ **To remove all tab stops:** on the *Format* menu click *Tabs* and then click *Remove All*.

▶ **To set default tab stops:** on the *Format* menu click *Tabs*. Enter the interval between tab stops under *Default Tab Stops*.

Dot leaders

Dot leaders can be used between tab stops to help readability. When a leader is applied to a tab, a row of dots is inserted between the end of preceding text and the current tab stop. This is typical of table of contents and similar styles.

▶ **To insert a dot leader:** on the *Format* menu click *Tabs*, select the tab stop from the list and tick *Dot leaders*.

Rotating text

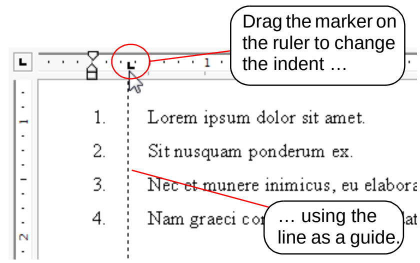
Text can be rotated only when it is in a text box, see “Rotating text” on page 44 for details.

Bullets and numbering

Bullets or numbering can be applied to paragraphs if you want to emphasize them or to create lists. When they are applied the paragraph indentation will automatically be changed to suit. Numbering can be reset at any time back to '1' and you can add a character to follow the number, for example, a dot. You can specify a different font (or font attribute) for the bullet or numbering character. By default, bullets use the '•' character, but you can change this, if required, to a different character.

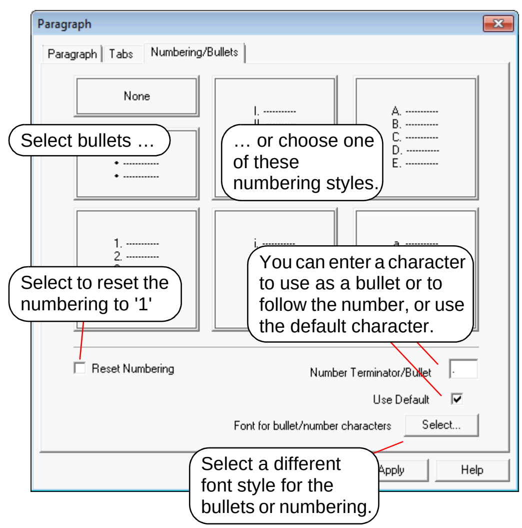
▶ **To set bullets or numbering:** use the *Bullet* or *Numbering* toolbar buttons
– or –
on the *Format* menu click *Paragraph* and on the *Numbering/Bullets* page select the style that you want.

A hanging indent is automatically applied with a tab between the bullet/number and the text.



▶ **To format bullets and numbering:** on the *Format* menu click *Paragraph* and on the *Numbering/Bullets* page select formatting as required.

▶ **To turn off bullets or numbering:** de-select the appropriate toolbar button.
– or –
on the *Format* menu click *Paragraph* and on the *Numbering/Bullets* page select *None*.



Importing paragraph content

You can include RTF content created outside Content Author in your message. You can import the contents of an RTF file directly into your message, and also copy and paste the RTF – see “Using the clipboard” on page 24 for details.

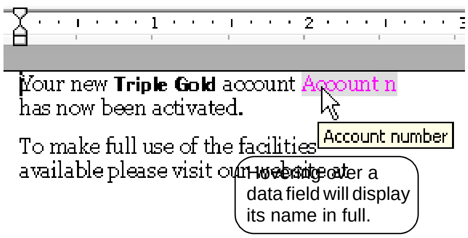
The text, colors, tabs and justification used in the RTF are included when it is imported. Only fonts that are available in Content Author will be imported – otherwise the nearest matching font will be used. Images are not imported.

Text in RTF format may be slightly different depending on which application it was created by. Should you experience inconsistencies, open the RTF file in Windows WordPad and save it (as an RTF file). You can then import from this file.

▶ **To import RTF content:** from the *Insert* menu select *RTF*. Browse to the RTF file and click *Open*.

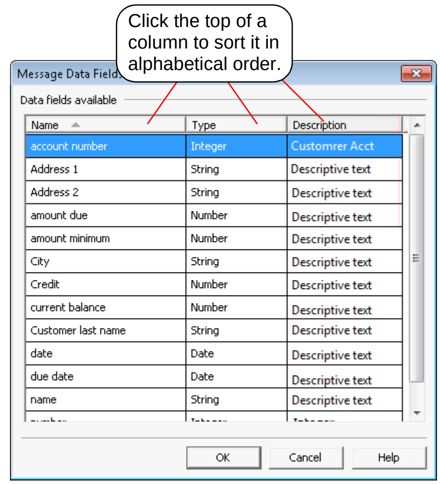
Data fields

Data fields are inserted into the body of a message in order to customize messages and make them more personal at run time. For example, you may wish to include the customer's name in the message. A data field is a link to information in the Designer publication. The actual information will be substituted in the production environment.



Data fields are selected from a list of those that are available for the message, and inserted directly into the text at the current insertion point. They are displayed in a gray box. The data field name may have been truncated to provide a better representation of the actual length of the eventual data, for example, the data field 'Amount' could be truncated to 'Am', to represent a two digit number.

▶ **To insert a data field:** in the *Insert* menu click *Data Field*
– or –
click the tool button.
Choose a data field from the *Message data fields* dialog box and click *Insert*.



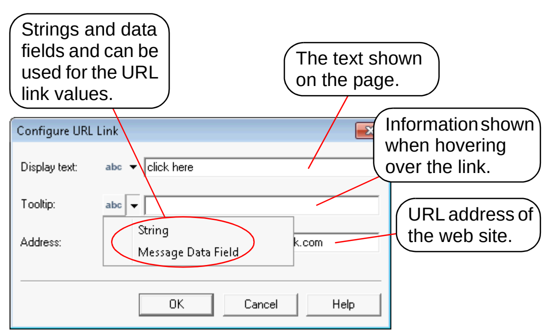
URL links

URL links can be included in applications that are intended for web enabled output. If they are used in non–web enabled output then the display text or graphic is still shown, but the link will be inactive.

Strings and message data fields can be used for the URL link values. For information on data fields, see "Data fields" on page 37.

> NO CHECK IS MADE THAT THE URL LINK REFERENCES A VALID ADDRESS.

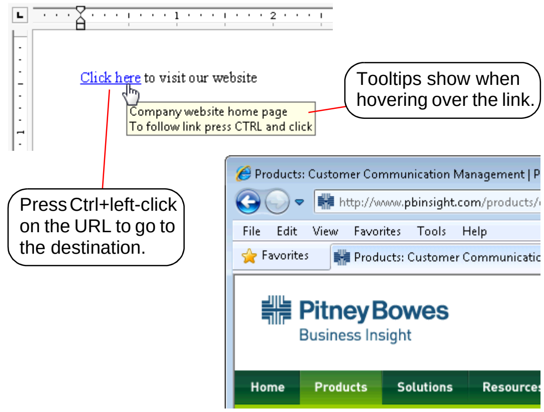
▶ To create a URL link:
in the *Insert* menu click *URL Link*
– or –
click the toolbar button.
In the *Configure URL Link* dialog box specify the options for the link.



▶ **To create a URL link for an image:** select the image and from the *Format* menu click on *Shape*. In the *Image* tab, select *Clickable image* and specify the options for the link. Use the *Alternative text* option to specify the tooltip. This text is also shown if the image cannot be displayed.

▶ **To edit a URL link:** highlight or click in the URL and in the *Format* menu click *Field*. Change the options for the link as required in the *Configure URL Link* dialog box.

▶ **To test a URL link:** hover over the link and hold down Ctrl and click the left mouse button. Your internet browser will start up with the URL in the address.



Working with graphics

In a message you can insert images and text boxes, or you can draw simple graphics using the editor's drawing tools. These are known collectively as shapes.

Text boxes are treated as graphics. The rectangle shape of a text box can be filled and given a border as for other graphics and it has the same controls for flowing into paragraph text. Unlike other graphics however, a text box is intended to contain other presentation objects.

You can control how graphics interact with paragraphs by specifying how text flows in relation to individual graphics and how much margin space is required where text flows around.

You are able to specify the order in which overlapping graphics are presented and can use the tools provided to align and space graphics in relation to one another.

Anchors and positioning

A graphic is always positioned in relation either to a paragraph or to the message area; this is known as its anchor. There are three different types of anchor – inline, anchored and fixed.

When a graphic is inserted it is initially anchored according to the type of graphic. When you move the cursor over the graphic the type of anchor used is displayed. You can change the anchors of individual graphics once they have been inserted.

The following anchor types are available:

In-line	Positioned as a character within paragraph text. Paragraph line spacing will be increased to accommodate the graphic, unless it has been set to an 'exact' value. In-line is the default for images.
Anchored	Positioned relative within the message flow. In the vertical plane the object is offset in relation to the previous paragraph or the top of the message if no paragraph exists. In the horizontal plane the offset is always in relation to the left side of the message. Anchored is the default for shapes, such as lines, rectangles, ovals and text boxes.
Fixed	Positioned at a specified offset in relation to the top left corner of the message.

To change the anchor type: select the graphic and from the *Format* menu select *Shape*. In the *Layout* tab under *Flow* select the required anchor type and click *OK*.

NOTE THAT NOT ALL ANCHORING METHODS ARE APPLICABLE TO ALL TYPES OF GRAPHIC.

Co-ordinates and dynamic positioning

Graphics using anchored or fixed methods are typically positioned by dragging the object to the required position in the message or by specifying co-ordinates as constant values using the shape properties, see “Moving and resizing” on page 45 for details.

WHEN POSITIONING GRAPHICS USING VARIABLE DATA IT IS VITAL TO CARRY OUT THE APPROPRIATE LEVEL OF TESTING TO ENSURE CORRECT PLACEMENT IN THE PRODUCTION ENVIRONMENT.

You can also use data fields to specify co-ordinates which means that the graphic can have dynamic offsets that differ from message to message.

To position using co-ordinates: select the shape and on the *Format* menu click *Shape*. In the *Layout* tab select the required unit of measurement. Choose the appropriate value object using the value option button for the X and Y offsets.

Drawing shapes

You can create simple graphics directly in the message by using the shape drawing tools. These include lines, rectangles and ovals. You can customize the line thickness, shading, fill color etc. used for such shapes. When you create a new shape the attributes of the previously created shape will be used. You can adjust these by editing the shape’s attributes once it has been created.

Graphics are, by default, anchored to a paragraph. However you can change this once the graphic has been drawn, see “Anchors and positioning” on page 40.

Note that some or all shapes may not be available to every author.

To draw a shape: click in the paragraph that you want the graphic anchored to and on the *Insert* menu select the required shape or click the appropriate toolbar icon. Click where you want to start drawing and drag out the shape to the required size. Note that holding down SHIFT while drawing will create a square, a circle, or a horizontal or vertical line.

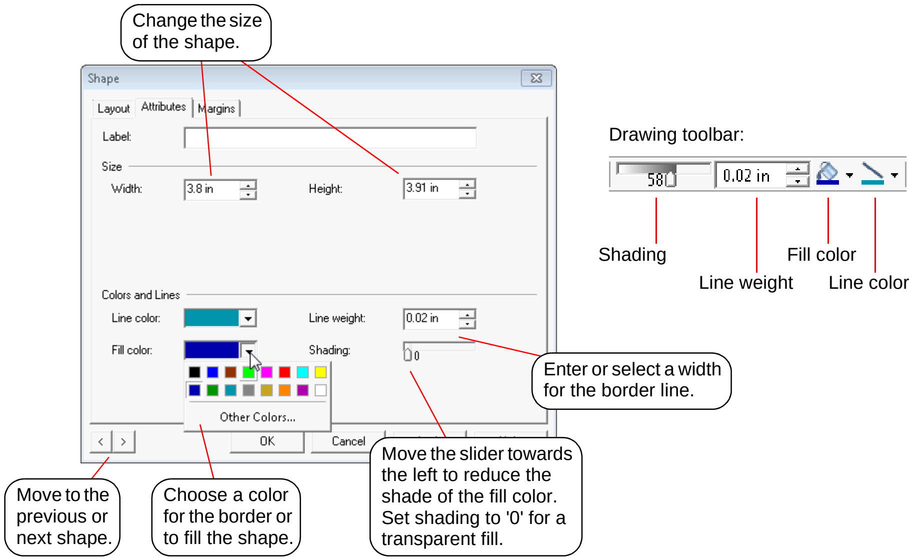

Line


Rectangle

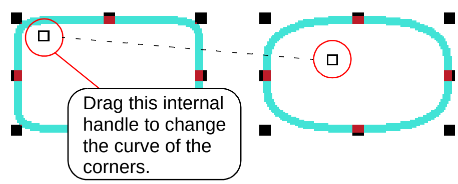

Rounded Rectangle


Oval

▶ **To change shape attributes:** select the shape in the editor and on the *Format* menu click *Shape*.
Use the *Attributes* tab to set the required color, shading and line settings.



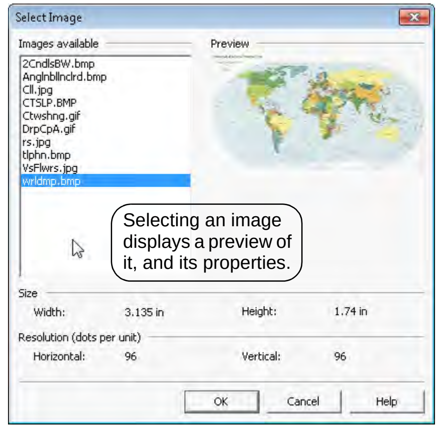
▶ **To change the corners of a rounded rectangle:** select the rectangle and drag the internal handle. Both the amount and the shape of the curve will change.



Using images

Images can be inserted into a message area provided that the message area is large enough. The image is initially inserted at the insertion point as an in-line graphic but, as with all shapes, you can change its anchor type – see “Anchors and positioning” on page 40. If the image is too large for the message area you will be able to save the message but you will not be able to submit it for review.

An image can also be used as a URL link (for PDF, HTML and eHTML datastreams only) by selecting the *Clickable image* option. See “URL links” on page 38 for details.



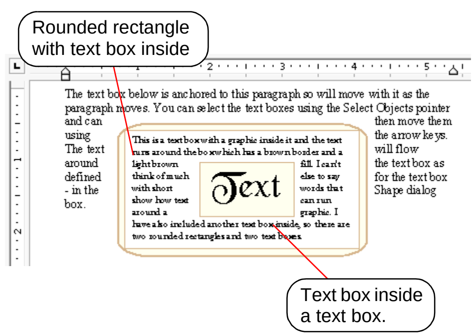
▶ To insert an image:

1. Click in the paragraph where the image is to be inserted.
2. From the *Insert* menu select *Image*
   – or –
   click the *Image* button in the Objects toolbar.
3. Use the *Open* dialog box to select the image you want to insert.

▶ To change the image used: select it and from the *Format* menu choose *Shape*. Select the *Image* tab in the *Image* dialog box and enter or browse for a different image.

Text boxes

A text box is used as a container for specific message content and can be drawn anywhere in a message area. It can contain anything that a message can – text, images and so on – and you can apply colored borders and shading to it. This allows message content to be placed at any position in the message. Text boxes can be embedded within text boxes as shown in the example.



The dimensions of a text box are as drawn. If content does not fit you must resize the text box appropriately. It is important to note, however, that data fields can cause the text box to overflow in production. Any content that does overflow the available space will be lost.

Text boxes are, by default, anchored to a paragraph. This can be changed once the text box has been drawn; see “Anchors and positioning” on page 40“.

▶ To create a text box: click in the paragraph where you want the text box anchored and from the *Insert* menu select *Text Box*
– or –
use the *Text Box* button in the Objects toolbar.
Drag out the box to the required size. A text box will be created with an empty paragraph. Enter content as normal.

▶ **To change text box line and fill settings:** select the text box and on the *Format* menu click on *Shape*. Use the *Attributes* tab to customize the settings. See “Drawing shapes” on page 41 for more information.

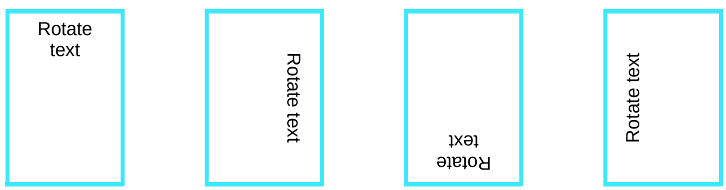
Rotating text

Only text that is inside a text box can be rotated – by 90˚, 180˚ or 270˚.

The text box itself will not be rotated, although it will adjust to cater for extra lines. However, you may need to resize it to the required dimensions once the text has been rotated.

> ⓘ ANY IMAGE OR GRAPHIC THAT IS ALSO IN THE TEXT BOX WILL NOT BE ROTATED. YOU WILL HAVE TO PROVIDE IT IN THE REQUIRED ROTATION.

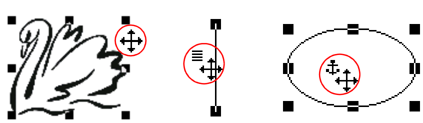
▶ **To rotate text within a text box:** place the pointer inside the text box and on the *Format* menu select *Rotate Text* – or use the *Rotate* button in the Text Formatting toolbar.



Rotated by 90° Rotated by 180° Rotated by 270°

Selecting and adjusting graphics

In order to adjust a graphic, you must first select it. When it is selected, handles are displayed on the corners and sides of a bounding box. The pointer will indicate how the graphic is anchored.



Anchored fixed Anchored in-line Anchored to a paragraph

You can also select an existing graphic from the dialog box, cycling through them in the order they were created. This means that when you have changed the attributes for one graphic, you can move on to another one and change it without closing the dialog.

Note that white handles indicate that the graphic is open for input, e.g. a text box is ready for you to type in. Black handles indicate that the graphic is just selected, and can be moved, or if appropriate, resized.

To select a graphic: click anywhere in the graphic or on its border.

To select multiple graphics: select the first graphic and then hold down SHIFT whilst you click the others
– or –
use the *Select Objects* toolbar button and drag across all the graphics, ensuring that you enclose them all completely.

To view the next or previous graphic: on the relevant shape formatting dialog box use the next > or previous < buttons.

To select all graphics: click the *Select Objects* toolbar button to turn the select mode on and on the *Edit* menu click *Select All*.

To deselect a graphic when many are selected: hold down SHIFT and click the graphic. The handles will disappear from the graphic when it is deselected.

Moving and resizing

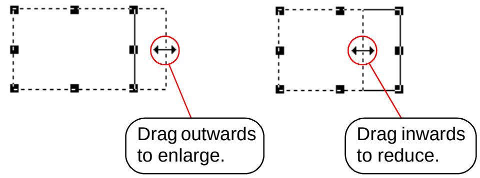
Graphics other than those using an inline anchor can be moved either directly within the message, or with precision using the settings in the dialog box. Graphics can be resized in the same way.

You can also align graphics to each other, or move them so that the space between them is evenly distributed.

> IF YOU WANT TO MOVE GRAPHICS IN RELATION TO TEXT, RATHER THAN OTHER GRAPHICS, THEN YOU MUST USE THE TEXT RUNAROUND PROPERTIES. SEE "LAYOUT" ON PAGE 48.

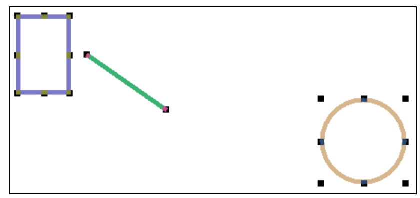
To move a graphic: hover over the graphic and when the movement pointer displays, drag to its new position
– or –
select it in the editor and use the arrow keys to nudge it
– or –
select it in the editor and on the *Format* menu click *Shape*. Under the *Layout* tab enter the new position for the top left corner of the graphic. You can also use any object or function that supplies a value to specify co-ordinates to position the graphic, see "Co-ordinates and dynamic positioning" on page 41 for details.

▶ **To resize a shape:** select the graphic and drag any of the handles to the new size.
– or –
on the *Format* menu click *Shape*. Under the *Attributes* tab enter the new *Width* or *Height* amounts as appropriate. If you enter a value of zero for the width or height of a line, then the line will become horizontal (width=0) or vertical (height=0).

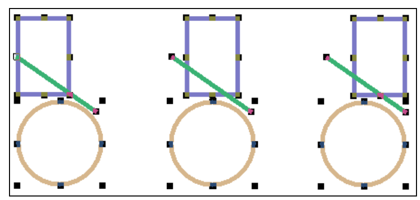


Aligning

If you have several graphics in a message, you can line them up with each other. They can be aligned on their edges or so that the middle of each graphic lines up.



Shapes selected for alignment



Aligned left Aligned center Aligned right

All graphics that are selected will be aligned with each other. They are aligned inside an imaginary box drawn around all the selected graphics, for instance, aligning graphics on the left will place them against the left of this box; aligning them in the center will align the centers of each graphic in the center of the box. It is important to ensure that the relevant graphic is in the correct position before alignment, for example, the right most graphic when aligning right.

▶ **To align graphics:** select the graphics and on the *Format* menu click *Align or Distribute* and select one of the following alignment options:

 Left – align with the leftmost graphic

 Centered between the leftmost and the rightmost graphics

 Right – align with the rightmost graphic

 Top – align with the topmost graphic

 Middle – between the topmost and the bottommost graphics

 Bottom – align with the bottommost graphic

Distributing

Graphics can be distributed so that the space between each graphic is the same. The graphics on the outside stay in the same position, and all those in between are moved so that the space between the borders of each graphic is evenly distributed. This is only available when there are three or more graphics selected.

▶ **To distribute graphics:** select the graphics, and on the *Format* menu click *Align or Distribute* and select one of the following distribution options:

 Distribute horizontally – left to right

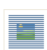
 Distribute vertically – top to bottom

Layout

Depending on the type of anchor, you can choose how adjacent text should flow around the graphic or whether the text should appear behind or in front of it, and its alignment across the page.

Graphics that are anchored inline are treated as just another character in the text and the line spacing will normally be increased automatically to accommodate them.

▶ **To select the runaround properties for a graphic:** select the graphic and on the *Format* menu click on *Shape*. On the *Layout* tab click the required *Wrapping style*:

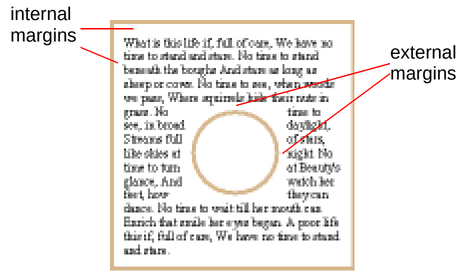
	*Square*	Text will flow evenly around the graphic.
	*Top and Bottom*	Text will flow down to the graphic and continue after it.
	*Left*	Text will only be placed to the left of the graphic.
	*Right*	Text will only be placed to the right of the graphic.
	*Behind*	Text will flow over the graphic.
	*In Front*	The graphic will sit on top of any text.

▶ **To select the alignment for a graphic:** select the graphic and on the *Format* menu click *Shape*. On the *Layout* tab set the *Flow* to *Anchored* and click the required *Horizontal alignment*:

Other	The graphic will be aligned according to the co-ordinates specified in *Position*.
Left	The graphic will be aligned with the left margin of the paragraph, with text flowing to the right.
Center	The graphic will be placed centrally between paragraph margins, with text flowing to the right and to the left.
Right	The graphic will be aligned with the right margin of the paragraph, with text flowing to the left.

Runaround margins

When a graphic is placed in the message you can specify how far away any text that flows around it should be. The margins and the runaround properties together determine how the graphic sits within the content of the message. Most graphics only have external margins, but text boxes have internal margins as well. These determine how far text and graphics that are inside the graphic are from the border.



▶ **To set the margins of a graphic:** select the graphic and on the *Format* menu click on *Shape*. On the *Margins* tab enter the required *Internal* or *External* margins.

Order of graphics

As graphics are inserted onto the page they are initially layered in the order they are placed on the page. This means that later graphics will be displayed over earlier graphics if they overlap. You can adjust this order as required.

You cannot move graphics in front of or behind text in this way. You must use the runaround properties of the graphic to do this – see “Layout” on page 48.

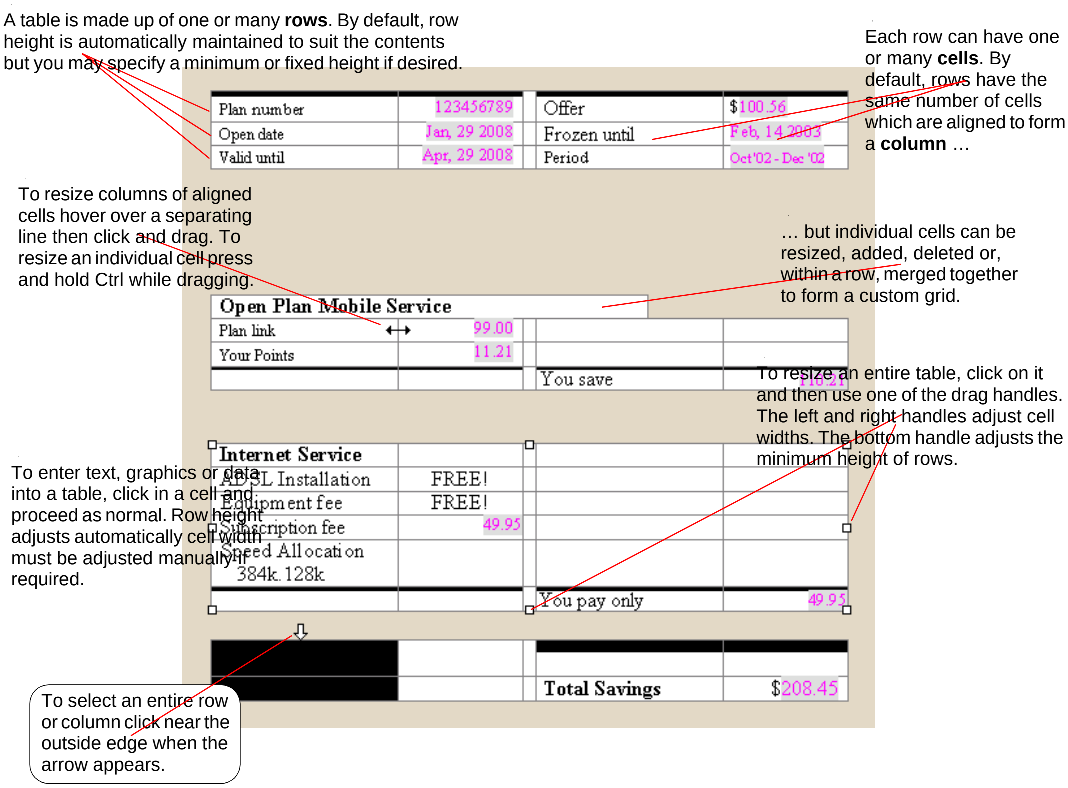
Note that you can cycle through graphics in their 'layer' order by using the previous < and next > buttons at the bottom of the *Image* dialog box.

▶ **To move a graphic forwards or backwards one layer:** select the graphic and on the *Format* menu point to *Order* and select either *Bring Forward* or *Send Backward*.

▶ **To move a graphic in front of or behind all other graphics:** select the graphic and on the *Format* menu point to *Order* and select *Bring To Front* or *Send To Back*.

Using tables

Tables can be used in messages, enabling you to position content in a structured way without using tab characters. Text and graphics are aligned in rows and columns – as with most word processing tools.



▶ **To create a table:** position the insertion point where you want to insert the table and from the *Table* menu select *Insert/Table*. Specify the number and size of rows and columns as required.

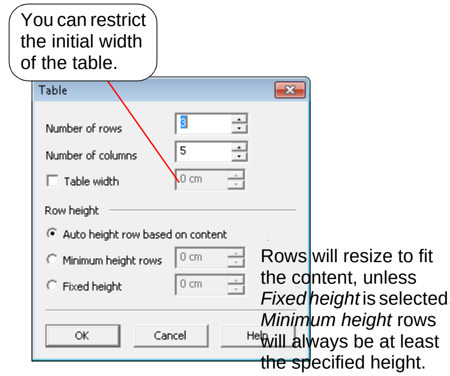


Table positioning

A table within a message is always positioned in relation to the object selected when it was inserted. You cannot move a table except by cutting and pasting it so that it is relative to a different object.

If you want to position a table at a fixed position in a message or at fixed offset from an object you will need to include it in a text box.

SEE "TEXT BOXES" ON PAGE 43 FOR INFORMATION ABOUT USING TEXT BOXES.

As with other presentation objects you can edit the table's properties to change the amount of space to be left between the table and the objects that appear before and after it in the message.

By default, a table is positioned as close as possible to the left hand margin. You can specify an indent to shift it to the right if required.

▶ **To customize table positioning properties:** on the menu click *Table/ Properties*. Use the *General* page to select special positioning options.

Editing tables

Content is added to a table by clicking in a cell then typing text, adding a data field or inserting an object as you would elsewhere. You cannot insert another table within a table cell.

Each table row starts off with a default minimum height. As content is added to the table, the height of individual rows will automatically grow to fit by default. You can specify that rows have a different minimum height or that they may not exceed a maximum height.

▶ **To adjust row height:** select any part of the table and on the menu click *Table/Properties/Table*. Use the *Advanced* page to select the appropriate *Row Height* setting and specify a measurement if required.

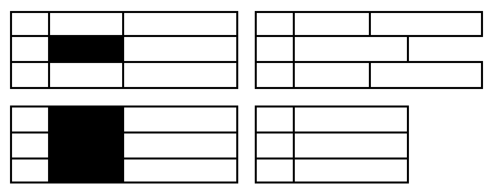
When new rows or cells are added they adopt the attributes and dimensions of the currently selected element by default.

▶ **To add a row, column or cell:** place the insertion point in an existing cell of the table, and from the *Table* menu click *Insert* and select the required row, column or cell option.

Most of the common resizing and editing operations can be performed using mouse operations. However, you may want to specify precise settings for some rows and cells.

When cells are deleted or resized, all remaining cells to their right retain their existing dimensions but close up to the left.

▶ **To resize cell widths:** select the cells to be adjusted and from the Table menu select *Properties/Cell*. In the *Cell* dialog box enter a new *Width* and click *OK*.



Before delete After

Adjacent cells in a row can be merged together to form a single cell (existing content will also be merged). This can be used, for example, for a description that applies to more than one column.

▶ **To merge cells:** select the relevant cells and from the *Table* menu click *Merge cells*.

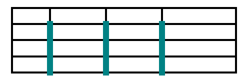
▶ **To delete tables rows, columns or cells:** click in or select what you want to delete, and from the *Table* menu click *Remove* and select the required table, row, column or cell option.

Borders and shading

You can customize the borders and shading used for cells, rows and tables. For borders you can specify the width and color of the line to be used for each edge of a cell, row or table. You can also specify rounded corners for the table. For shading, select the color to be used to fill the cell behind any contents it might have. As with all color issues, bear in mind the capabilities of your target output environment when setting these options.

The settings you specify for a selection of cells are applied individually to each selected cell.


Specifying a colored left hand border for these cells …


… will adjust borders for these edges.

▶ To adjust borders and shading:

1. Select the table, row or cells to be amended.
2. From the *Table* menu, select *Properties* and *Table*, *Row*, or *Cell* as appropriate.
3. On the *Style* page of the *Table Properties* dialog box specify the required color and line settings.

   For borders use the edge palette to select the edges you want to be changed. Note that any unselected edges will have existing settings removed.

   These 2 edges are selected.

   For shading, select a shading percentage for the color – 0 will be no color; 100 will be full color.
4. Click *Apply* to see the effect of your changes or click *OK* to apply the new settings and close the dialog box.

Tables can have rounded corners. They are applied to each corner of the table, on every page if the table overflows. The rounded corner is drawn in corner cells only; if the size specified is larger than the cell can accommodate, then that particular corner will not be rounded. Note that you may have to adjust the cell margin or format to prevent the contents of a cell overprinting the rounded corner.

▶ To specify rounded corners for a table: select the table and from the *Table* menu, select *Properties*. On the *Style* page of the *Table Properties* dialog box select *Enable rounded corners* and specify the required radius of the curve.

I

See “System variables” on page 172 for further information.

The Review Process

In Content Author every new or updated message must be approved by each assigned reviewer before it becomes available for deployment to the production system. Reviewers are assigned responsibility for the messages in one or more Content Author projects by an administrator. The Content Author review mechanism can include automated e-mail notifications to those involved in the process.

The Review Cycle

An administrator specifies who should be involved in reviewing messages. *Review groups* are created and assigned to specific projects and all messages in the project must be reviewed by the users indicated in the groups. The sequence of the reviewers within the groups and the sequence of the review groups within a project dictates the review order. It can be specified that either all reviewers, or any one reviewer, in each review group must approve a message before it can be deployed to the production system.

Provided Content Author is configured appropriately e-mail notifications are sent to reviewers in turn once the preceding reviewer in the sequence has approved a message. If a message is denied an e-mail is sent to the author; similarly when it has completed the review process successfully. Messages that are waiting for you to review will be shown in the Reviewer tab when you next log in.

Once *In production* a new revision of the message must be created before it can be edited again. Administrators and authors with access to the message can do this.

A list of the reviewers is shown in the *Properties* tab for a message. You can monitor the progress of a message through the review cycle on the *History* page of the message properties view. The following statuses are used during the review process:

> Review groups specified as ‘all reviewers in the group must review’ show individual user names; those specified as ‘any one reviewer in the group can review’ show only the name of the review group.

- **Draft.** A newly created message always starts in Draft status.
- **Being Reviewed.** A new or amended version of the message is in review.
- **Unapproved**. A message has been denied by a reviewer and not yet resubmitted.
- **Awaiting production.** All reviewers have approved but the message is not yet deployed.
- **In production**. Has been deployed to the production system.

 **Awaiting Expiry**. The message has been set to expire but is not yet deployed.

 **Expired**.

To see the review status: select a message from the *Messages* list and then click the *History* tab to display the current review status of the message.

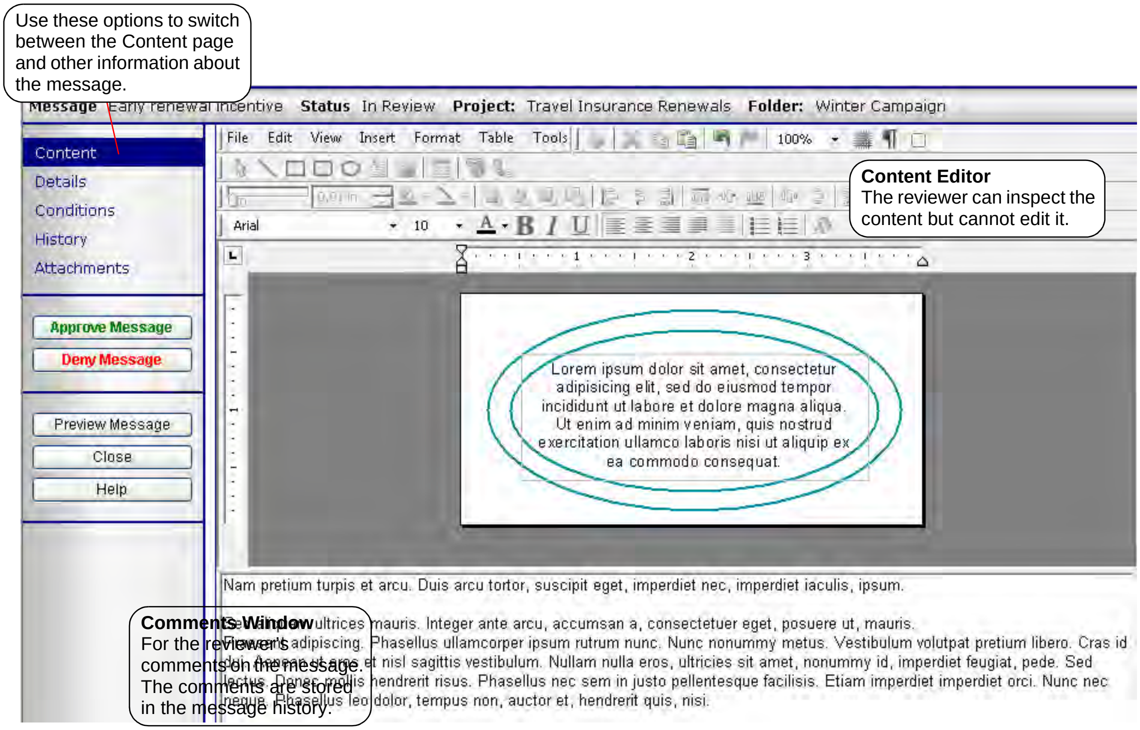
To see the review cycle list: select a message from the *Messages* list and then click the *Details* tab to display the list of reviewers associated with the message.

Reviewing messages

When you log on to Content Author as a reviewer, all messages that are ready for you to review are listed. They are shown by project and folder. Messages are displayed in the Message view and you can make any comments in the Comments window.
Note that if you are part of a review group where any reviewer can review, messages reviewed by someone else in the group will be removed from your list.

Messages shown will have been approved by all preceding reviewers, as, if a message is not approved, it is immediately returned to the author, corrected and then re-submitted to the review cycle again.

▶ **To review a message:** click the message name in the *Messages* list. Once you are satisfied click the *Approve Message* option. Or click *Deny Message* to return it to the author.



Tips on reviewing

Review both the content and the message properties found in the *Summary* page.

Check that a sensible priority has been used and that effective dates are correct.

Check that the conditions associated with the message will mean it is selected for the appropriate documents.

Check any message comment in the *Details* page for any information relevant to the review.

If the administrator has set up a preview application for use with the project use the *Preview Message* option to see how it will look within the context of a Designer publication.

If it is available for the text language used in the message use the spell checker to verify it.

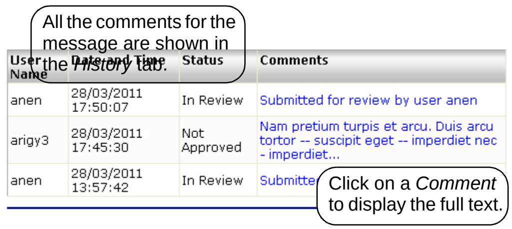
Provide comments about your review. These are stored with the message and are available to other reviewers and authors.

▶ **To run the spell checker:** on the *Tools* menu select *Spell Check*.

Comment History

Previous comments made about a message can be viewed in the *History* tab of the message. You can see all comments and status changes since the message was first submitted for review. As you will only receive messages that have been approved by all preceding reviewers, you can use this to confirm that previous comments have been actioned satisfactorily.

▶ **To view previous comments:** while editing the message click the *History* tab. Click on a *Comment* to display it in full.



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