Content Publisher User Guide 10g Release 3 (10.1.3.3.0)

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Contributing Authors: Ron van de Crommert

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General BSD License	C-5
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Glossary

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INTRODUCTION

OVERVIEW

This section covers the following topics:

- About Content Publisher (page 1-1)
- ✤ What's New (page 1-2)
- Using the Help System (page 1-3)
- Upgrading to Content Publisher 10gR3 (page 1-6)

ABOUT CONTENT PUBLISHER

With Content Publisher, you can streamline the publishing process by converting standard business content into professional, well-designed, interactive Web sites.



Figure 1-1 Content Publisher screens

The Content Publisher suite comprises Site Builder, Site Scheduler, and Site Server. When you use these together, you can create a Web site true to your professional image without altering sensitive source documents (word processing, data sheets, presentation files, etc.)

You can use the online Help to make the most of Content Publisher. (See About the Help System on page 1-3.) Additionally, you will find two learning exercises, the Seven Easy Lessons and the comprehensive Tutorial, both available from the Help menu. Lastly, you may refer to the Installation and Configuration Guide, Release Notes, Creating a WML Project, and Enabling Section 508 Compliance for more information.



Note: See User Documentation (page 1-3) for a complete summary of the documentation available for Content Publisher.

WHAT'S NEW

Content Publisher 10gR3 is a version that contains performance improvements, updated filters for greater conversion fidelity, and fixes for known problems. It also comes with "TCConsole".

- New filters—This release of Content Publisher includes updated conversion filters that can handle Microsoft Office 2007 applications. See Appendix B (*Office 2007 Limitations*) for a number of conversion considerations.
- TCConsole—This release of Content Publisher includes the console application TCCONSOLE.EXE, which provides Site Server with limited command functionality

to control the execution of an existing project. For more information, see the *Command Line Functionality.pdf* in the Documentation folder.

USING THE HELP SYSTEM

This section covers the following topics:

- About the Help System (page 1-3)
- User Documentation (page 1-3)
- Using Site Builder Help (page 1-4)
- Help From the Menu Bar (page 1-5)

About the Help System

The Content Publisher Help system consists of individual Help topics in HTML format. You can view the Help system in a Web browser such as Internet Explorer or Firefox, and you can use conventional Web browser controls to navigate and view the Help topics (Back, Forward, Favorites, Print, and so on).

You can access Help topics related to each feature in Site Builder by clicking the Help button (you can also access the Help system from the Help menu in Site Builder and Site Scheduler).

User Documentation

Following is a complete summary of the user documentation available for Content Publisher. The PDF manuals can be opened from the drop-down list on the top pane of the Help window.

- Release Notes (PDF)—Open from the Content Publisher program group. Available in the Documentation folder of your Content Publisher directory and in the root directory of your product disc.
- Installation & Configuration Guide (PDF, print)—PDF version available in the Documentation folder of both your Content Publisher directory and product disc.
- Getting Started (PDF)—PDF version available in the Documentation folder of both your Content Publisher directory and product disc.

- Seven Easy Lessons (PDF)—Open from the Startup Screen and Help menu in Site Builder. Available in the Documentation folder of both your Content Publisher directory and product disc.
- Tutorial (PDF)—Open from the Startup Screen and Help menu in Site Builder. Available in the Documentation folder of both your Content Publisher directory and product disc.
- Enabling Section 508 Compliance (PDF)—Available in the Documentation folder of both your Content Publisher directory and product disc.
- Creating a WML Project (PDF)—Available in the Documentation folder of both your Content Publisher directory and product disc.
- Online Help (Help)—Open from Help menu in Site Builder.
- What's New (Help)—Open from Help menu in Site Builder. See the "What's New" book on the Contents tab of Help.

Using Site Builder Help

Site Builder has an extensive Help system to help you use all of the tools available for creating Web pages. You can access Help at any time, from the main window or from any tab dialog or dialog box that has a Help button.

- Help menu—On the menu bar of the main window. Choose Help Topics to open the Help system. Note the other commands on this menu.
- Help buttons—On any tab dialog or dialog box. Click the Help button to display a topic specific to that tab dialog or dialog box.
- F1— Press at any time in Site Builder. On any tab dialog or dialog box, F1 works like a Help button to display a topic specific to that tab dialog or dialog box.
- Status bar Help—Available from the status bar on the main screen. When you pass the cursor over a menu command, a brief description of the function of that command appears at the bottom of the main window.
- Wizards—Four wizards are available in Site Builder to assist you in using the program. The Add a Document Wizard is available on the large toolbar. The Template Wizard is available in the Edit Template dialog box. The Folder Import Wizard is available when you choose Import from the File menu. And the Project Export wizard is available from the Server menu. See Wizards in Site Builder (page 2-4) for more information.

Help From the Menu Bar

The Help menu contains the following commands for obtaining assistance in Site Builder:

- Help Topics—Opens this Help system. Pressing F1 from anywhere in Site Builder will perform the same function.
- What's New—Opens the Help topic 'What's New in Site Builder', which highlights the latest Site Builder features.
- Seven Easy Lessons—Opens the seven introductory lessons in PDF format. These are recommended for new users.
- Tutorial—Opens the Tutorial in PDF format. These lessons are a comprehensive version of the Seven Easy Lessons.
- Show Startup Screen—Opens the Startup Screen with commands for starting a new or existing publication, and also for running the Seven Easy Lessons and the Tutorial.
- Site Models—Provides a direct link to the Site Models, a variety of Web site examples built with technology. (Each site model is located on the Support Web site.)
- About Site Builder—Provides the version number and copyright information for the Content Publisher product you are using.

Internet Explorer on Windows XP SP2

The Help systems in Content Publisher use client-side JavaScript to display the Contents pane. If you are running Windows XP Service Pack 2 and open Help from Designer, you may not see its contents because Internet Explorer, by default, prevents users from viewing active content on a local file system. To view the Help system, click on the Information Bar and choose Allow Blocked Content..

Follow these steps to prevent this message from appearing each time:

- 1. Open Internet Explorer and choose **Tools > Internet Options**.
- 2. Click the **Advanced** tab.
- 3. Scroll down to Security.
- 4. Check the box Allow active content to run in files on My Computer.
- 5. Click **OK** to close the Internet Options dialog box.

For more information, see Internet Explorer Help.

UPGRADING TO CONTENT PUBLISHER 10gR3

This section covers the following topics:

- Migrating From a Previous Version (page 1-6)
- Importing the Previous Version Default.tcp (page 1-6)
- Importing Project Files From a Previous Version (page 1-7)
- Converting Older Projects in Site Server (page 1-8)
- Importing Templates From a Previous Version (page 1-9)

Migrating From a Previous Version

If you are upgrading from a previous version of Content Publisher, you may need to do one of the following:

- Importing Project Files From a Previous Version (page 1-7)
- Importing Templates From a Previous Version (page 1-9)
- Importing the Previous Version Default.tcp (page 1-6) (assuming you customized your default project file in a previous version of Content Publisher and want to use it in version 10gR3)
- Automatically Running Pre-7.2 Projects in Site Server (page 8-26) (when using Site Server)

You can run version 7.2, 7.5, and 7.6 project files immediately. Pre-7.2 project files will need to be converted to the 10gR3 format (and once saved in that format, they can no longer be run in the previous version of Content Publisher).

Importing the Previous Version Default.tcp

If you customize the default project file for a previous version of Content Publisher and want to use it in version 10gR3, you can do so easily. This assumes that you preserved a copy of the Default.tcp before you installed version 10gR3 of Content Publisher.

- 1. Close Site Builder, if you currently have the application open.
- 2. Copy the old default project file into the ..\Resources\en folder of your Content Publisher directory (first changing its extension back to .tcp, if necessary), thus overwriting the default project file that was installed with Content Publisher 10gR3.

Any new projects you now create in Site Builder will be based on the customized Default.tcp you were using in version 7.2, 7.5, or 7.6. That is, you have preserved all the customization you did to the older project file.

Use these instructions to import Default.tcp from a pre-7.2 version:

- 1. Close Site Builder, if you currently have the application open.
- 2. Copy the old default project file into the ...\Resources\en folder of your Content Publisher directory (first changing its extension back to .tcp, if necessary), thus overwriting the default project file that was installed with Content Publisher 10gR3.
- 3. Open Site Builder.
- 4. When the dialog box as shown in Figure 1-2 opens, click Save.

You have now converted your customized pre-7.2 Default.tcp into the 10gR3 format. You have preserved all the customization of the older project file. In addition, you can take advantage of new features available for 10gR3 projects.

If you have never customized Default.tcp but may be interested in doing so, see Editing the Default Project File (page 4-5).

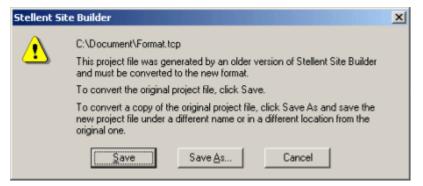
If the installed version of Default.tcp becomes corrupted or ever needs to be replaced for whatever reason, you can find a copy of the file in the Support folder on your Content Publisher product disc.

Importing Project Files From a Previous Version

When you open a project file from version 7.2, 7.5, or 7.6 of Site Builder in version 10gR3, it will run immediately, just as if it were a 10gR3 project file. Likewise, you can schedule version 7.2, 7.5, and 7.6 project files to run on your installed instance of Site Server 10gR3.

However, if you open a pre-7.2 project file in Site Builder for the first time, the following dialog box appears:

Figure	1-2	Dialog box	
- igui c		Dialog box	



Click **Save** to convert your pre-7.2 project file into a 10gR3 project file that can be run immediately in Site Builder 10gR3. (The history file for the older-version project file will remain associated with the new version in the 10gR3 format.)

Click **Save As** to make a copy of the existing (older version) file, either with a new name or in another directory. Once you do this, however, the history file will no longer be associated with the project file. Moreover, once you convert a pre-7.2 project file to the 10gR3 format, you cannot run that project again in the older version of Site Builder.

If you plan to import a large number of pre-7.2 project files into Site Builder 10gR3, and want to keep copies of your older project files, you may want to start out by making those copies (which you can do in Windows Explorer). Then, each time you import a project, you can simply click Save when the above dialog box appears.

Site Server will not automatically convert pre-7.2 project files to the 10gR3 format. However, there is a switch in Site Server that allows you to convert the older project files into the new format so that you can schedule the project to run in Site Server. See Converting Older Projects in Site Server (page 1-8).

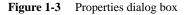
Converting Older Projects in Site Server

Like Site Builder, Site Server will automatically translate 7.2, 7.5, and 7.6 projects; however, it will not automatically translate pre-7.2 projects. If you plan to schedule pre-7.2 projects for translation on Site Server, you have two options:

- Open the pre-7.2 project files in Site Builder and save them to the 10gR3 format, as explained above, and then schedule them for translation by Site Server.
- Change a setting in the Site Server Properties dialog box so that the server will automatically convert all scheduled pre-7.2 projects to the 10gR3 format before translating them. Since Site Server simply converts an existing file to the 10gR3

format (and does not preserve a copy of the pre-7.2 version), this switch is off by default.

If you installed Site Server as an OLE Automation Server on Windows XP, and Site Server is running, right-click the Site Server icon on the taskbar and choose Properties. The Properties dialog box will open. Then select **Update old project files to the current format.**



Stellent Site Server	x
Options Notifications Control	
Logging Server Log File: ocuments\Stellent\SERVERLOG.TXT Logging Level: 4 - Client Task Edit/Create/Delete	
Options Server threads Image: Update old project files to the current format 1 Image: Allow recovery of project files when possible 1	
Language Application language preference: English (en)	
OK Cancel	

If you are running Site Server as a Service, the same option is available by opening the Control Panel and clicking the Site Server icon.

Importing Templates From a Previous Version

You can use a template from a previous version of Site Builder in version 10gR3 in three different ways:

- Import the template as part of a project file from a previous version that you convert to the 10gR3 format, or
- Import the template as a standalone file directly into any Site Builder 10gR3 project file (including the default project file, Default.tcp), or
- Link to the standalone template file, assuming it is accessible on your network

Templates imported as part of an older project will be available only for the projects of which they are a part, unless you formally export them and then import them into any new version project you create (or link your projects to the external, standalone file). If you want such a template to be available for *all* new Site Builder projects, you should import the template into the default project file.

You can view all the templates that ship with Content Publisher 10gR3 in the Manage Templates dialog box. The templates listed are "internal." You can also have "external" or "linked" templates. You create a linked template by linking to a standalone template file on your file system or in a content server (using the Link button in the Manage Templates dialog box). You can use a linked template to format your Web pages just as you would an internal template. However, you must import the standalone template into a 10gR3 project in order to edit it.

Chapter

USING CONTENT PUBLISHER

This section covers the following topics:

- Startup Screen (page 2-1)
- How Site Builder Works (page 2-2)
- ✤ Wizards in Site Builder (page 2-4)
- Exiting Site Builder (page 2-4)
- Setup and Configuration (page 2-5)

STARTUP SCREEN

Site Builder opens with the Startup Screen on top of the main window. (You can open it at any time by choosing Startup Screen from the Help menu.)

The Startup Screen offers ways to start a project plus some learning opportunities.

- Wizard—Walks you through the process of starting a new publication. Helpful if you are new to Site Builder and not yet familiar with its basic features and commands.
- Blank Publication—The same as starting a new publication from the File menu or the toolbar. Opens the Publication Properties dialog box for the default publication "Unnamed." You can rename the publication and change the output directories, if you want. The new name appears at the top of the Publication Hierarchy pane and just above the Contents pane. But the title bar still shows "Unsaved," because Site Builder lets you name a publication and its project file differently, and you still haven't named the project file. (To name and save a project file, choose Save As from the File menu.)

- Open an existing publication—The same as opening an existing publication from the File menu or the toolbar. When the Open dialog box appears, you can locate the project file you want to use. When you select the file and click OK, the dialog box closes, the name of the project file appears in the title bar, the name of the publication appears at the top of the Publication Hierarchy pane and immediately above the Contents pane, and publication details appear in the Contents pane.
- Open the last publication used—A quick way to open the project you worked on during your previous session in Site Builder.
- Seven Easy Lessons—Opens Adobe Reader to display a series of lessons to help you learn the basics of Site Builder. The PDF manual is also available from the Help menu.
- Tutorial—A series of lessons for the more advanced user that explore the many features of Site Builder in detail. The PDF manual is also available from the Help menu.

Note: If you don't want the screen to show the next time you open Site Builder, select **Don't show this screen again**. To open the screen at any time, click **Show Startup Screen** on the Help menu.

HOW SITE BUILDER WORKS

In its simplest terms, Site Builder converts source documents into Web pages using elements and templates.

Small Publication

In a small Web publication, you might perform the following tasks to create a Web page from a source document:

- 1. Start a new project (see The Project File on page 4-3) in Site Builder.
- 2. Create a new publication (see Adding a Publication on page 5-3).
- 3. Select a source document from a repository (could be the file system, an FTP, HTTP, or a content server). (See Adding a Document on page 5-31).
- 4. Associate a template (see Choosing a Template on page 6-3) with that document when you add it to your publication (this process involves applying styles, patterns, or ranks to the document).

- 5. Modify the template (see Template Editing Options on page 6-9) to create a desirable look and feel for your publication (you do this using the Element Setup, Formatting, Navigation, and Globals tab dialogs).
- 6. Design a page layout (see Layout Options: Frameset, HTML Table, and Custom Table on page 5-56) for the Web site using HTML tables or framesets (you do this using the Layout dialog box).
- 7. Translate the document into a Web page (which is stored on your local file system). (See Translating Source Documents on page 5-41).
- 8. Publish the Web page to a Web server (could be the file system, an FTP, HTTP, or a content server). (See Publishing a Project on page 8-17).

Large Publication

Thanks to the power of Site Builder, you can easily handle more complex projects. A more sophisticated Web publication might include the following:

- Add a variety of source documents (Microsoft Word, Excel, Powerpoint, Adobe FrameMaker, Lotus 1-2-3, and more) to your project (See File Formats and Translation on page 5-44.)
- Build a publication hierarchy by adding publications to the root publication and then adding source documents and reference pages to each publication. (See Publication Hierarchy on page 5-8.)
- Build reference pages for each publication and subpublication (such as a table of contents, key word index, or query page) to aid navigation and information retrieval. (See Adding a Reference Page on page 5-53.)
- Add a directory item to a publication, to let content authors drop documents into that directory and to have those documents automatically translated to become a part of the Web publication. (See Adding a Directory Item on page 5-89.)
- Add a linked publication to your project. A linked publication is a separate project file that becomes part of your master project. (See Adding a Linked Publication to a Project on page 5-2.)
- Stage and publish your project using Content Publisher's dual publishing capabilities. (See The Dual Publishing Model on page 8-2.)

WIZARDS IN SITE BUILDER

There are four wizards in Site Builder:

- You can use the Add a Document wizard to add a document to a new or existing publication, pick a graphics set and select formatting options, and preview the results. You may find it especially useful if you are new to Site Builder. The Add a Document wizard is available from the large toolbar by clicking the wizard button (), as well as the Startup Screen.
- The Template wizard is available from the Edit Template dialog box, also by clicking the wizard button (). You can use it to pick a graphics set, format the top heading levels in the source document, and split the source document into multiple Web pages. This wizard also may be especially useful to those new to Site Builder.
- The Folder Import wizard is available by choosing Import from the File menu. It is designed to let you add a portion of your file system hierarchy to the publication hierarchy of your Content Publisher project. See Importing Folders From the File System Hierarchy (page 5-97) for details.
- The Project Export wizard is designed to let you move your project to another location on the network. See Project Export Wizard (page 4-13) for details.

EXITING SITE BUILDER

You can exit Site Builder at any time. Site Builder prompts you to save changes, if any, to the project currently open.

To exit Site Builder, do one of the following:

- ✤ From the File menu, choose Exit.
- ✤ Use the keyboard shortcut Alt, F, X.
- ♦ Use the keyboard shortcut Alt+F4.
- On the main screen, click the **Close** button on the title bar.



Note: If you have a project open when you choose to exit the program, Site Builder prompts you to save any unsaved formatting or other instructions before it closes the program.

SETUP AND CONFIGURATION

This section covers the following topics:

- Configuring Content Publisher (page 2-5)
- Anti-Virus Software (page 2-5)
- Disk Space (page 2-6)

Configuring Content Publisher

Content Publisher comprises the workstation Site Builder and the server Site Server. To successfully integrate Content Publisher with Content Server, you must first configure both Site Builder and Site Server.

- On each machine on which either Site Builder or Site Server is installed, install Internet Explorer version 4.0 or higher. See Installing Internet Explorer (page 7-3).
- On each machine on which either Site Builder or Site Server is installed, register (a) the name of each content server you want to have access to, and (b) the name of the HTTP server hosting each content server. See Registering a Content Server (page 5-24).
- On each machine on which Site Server is installed, create Registry entries for a username and password for each content server that Site Server will access. See Registering a Username and Password for Site Server (page 8-77).
- On each machine on which Site Server is installed, make sure that you have installed the server either as an OLE Automation Server or Service, depending on your preference. If the server is to run as a Service, complete the necessary additional configuration. See Setting Up Site Server as a Service (page 8-29).
- On each machine on which Site Builder is installed, import any project files and templates you have been using with a previous version of the product and want to convert for use with version 10gR3. See Migrating From a Previous Version (page 1-6).

Anti-Virus Software

Conflicts can occur with anti-virus software if you frequently run translations that can result in large log files. If translations occur frequently, the translation log file may be more or less continuously updated. Since the file is frequently changing, it can attract a lot

of attention from anti-virus software. As the anti-virus software attempts to review the entire file, more changes could get made to the file. This results in a deadlock situation, where the anti-virus software cannot catch up.

We recommend that you use a unique extension for the translation log file and set your anti-virus software to ignore files of that extension type.



Note: Choose **Application Options** from the View menu to change the logging options as well as the log file name and location. If you are scheduling a project for translation by Site Server, the server log file must be set up in the New Task dialog box for each project you schedule. You can view the log file for the latest translation by choosing Log File from the View menu.

Disk Space

If you experience performance difficulties, especially in displaying previews, check to see that you have adequate disk space. Adequate disk space depends upon the number of documents you are trying to translate and their complexity. A range of 25 to 50 megabytes of free disk space is highly recommended for translation purposes, though you may require much more for a large project. This disk space must be on the drive that contains your \\Temp directory. Of course, you will also require disk space at the staging and publishing areas for your translated output.

Chapter

3

CONTENT PUBLISHER INTERFACE

This section covers the following topics:

- Site Builder Main Window (page 3-2)
- Publication Hierarchy Pane (page 3-3)
- Contents Pane (page 3-3)
- Title Bar (page 3-4)
- Status Bar (page 3-4)
- Menu Bar (page 3-5)
- Popup Menus (page 3-5)
- Toolbars (page 3-6)
- Toolbar Commands (page 3-12)
- Application Options (page 3-14)
- ✤ Viewers (page 3-17)
- Showing and Hiding Toolbars (page 3-18)
- Showing Dialog Boxes (page 3-19)

SITE BUILDER MAIN WINDOW

Site Builder opens with a Startup Screen on top of the main window. You can make your initial choices from the Startup Screen or close the screen and begin project setup in the main window.

- Startup Screen—Lets you start a new project or open an existing one. Also offers two learning opportunities. See Startup Screen (page 2-1).
- Publication Hierarchy pane—Where you set up the hierarchy for your publication. You can add publications to the root publication, and add publications to those publications. Each publication becomes a subpublication when added to another publication. See Publication Hierarchy Pane (page 3-3).
- Contents pane—Where you display key setup information about a publication. See Contents Pane (page 3-3).
- Title bar—The horizontal bar at the very top of the main window. See Title Bar (page 3-4).
- Menu bar—The horizontal list of menu names below the title bar. See Menu Bar (page 3-5).
- Standard toolbar—The horizontal series of buttons below the menu bar. See Standard Toolbar (page 3-11).
- Large toolbar—The series of labels and buttons down the right-hand side of the main window. See Large Toolbar (page 3-9).
- Status bar—The information bar across the bottom of the main window. See Status Bar (page 3-4).

You complete project setup in the main window before you begin editing templates and formatting your Web pages. You can add publications to the root publication, and then add source documents and reference pages to each publication. Only publications appear in the Publication Hierarchy pane. All publication details, including the output page and template for each document, appear in the Contents pane.

PUBLICATION HIERARCHY PANE

The Publication Hierarchy pane is one of two panes in the Site Builder main window. The Publication Hierarchy pane shows the publication hierarchy (see Publication Hierarchy on page 5-8) for the current project (the root publication plus any subpublications). The Contents pane (see Contents Pane on page 3-3) displays publication details for whichever publication in the hierarchy is currently selected.

Publications are containers for organizing the source documents you want to turn into Web pages. Each project has a root publication. You can add publications to the root publication, and add publications to those publications, to create a multi-tiered publication.

You can use the plus and minus boxes to expand and contract the publication hierarchy. You can also right-click any publication and choose **Expand All** or **Collapse All** from the Tree submenu of the popup menu that appears. And with the left mouse button held down, you can drag a publication in the Publication Hierarchy pane to reposition it at a different level or in a different order in the publication hierarchy.

When you save the project file (see The Project File on page 4-3) at the end of a session, all the information you see in the Publication Hierarchy pane is saved, along with all the information in the Contents pane and the formatting instructions captured in the templates.

CONTENTS PANE

The Contents pane is one of two panes in the Site Builder main window. The Publication Hierarchy pane (see Publication Hierarchy Pane on page 3-3) shows the publication hierarchy (see Publication Hierarchy on page 5-8) for the current project. The Contents pane displays publication details for whichever publication in the hierarchy is currently selected.

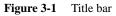
Each time you select a source document to add to a publication, details about the source document appear in the Contents pane: the name of the output file you will create when you translate the source document, the full path and name of the source document itself, the name of the template associated with the document, and the translation status of the source document.

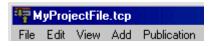
The Contents pane also displays the names of any reference pages you add to the publication. The only key information not visible here is the location of the output directories, which can be checked in the Publication Properties or Document Properties dialog box.

Once project setup is complete here, you are ready to edit the template for each document. When you save the project file (see The Project File on page 4-3) at the end of a session, all the information you see in the Contents pane is saved along with all the formatting instructions captured in the templates (and the publication hierarchy and location of output directories).

TITLE BAR

The title bar is the horizontal bar at the top of the Site Builder main window. The title bar always displays the name of the project file currently open.





To the left are the program icon, the name of the current project file, and the name of the program. To the right are buttons to minimize the main window, maximize or restore the window, and close the program.

You can right-click the program icon to open a popup menu with commands that duplicate these buttons.

STATUS BAR

The status bar is the horizontal bar at the bottom of the Site Builder main window.

Figure 3-2 Status bar

For Help, press F1

When you pass your cursor over a specific command in a menu or on the toolbar, the field to the left of the status bar displays a brief explanation.

MENU BAR

The menu bar is the horizontal list of menu names below the title bar at the top of the Site Builder main window.

Figure 3-3 Menu bar File Edit View Add Publication Template Run Viewers Server Help

Click a menu name to open the menu. Choose any command by clicking the command name or using its keyboard shortcut.

Some menu commands may be grayed out. For example, most of the Template commands are not available until you select a source document in the Contents pane.

POPUP MENUS

Throughout Site Builder there are many opportunities to right-click in order to open a popup menu with a selection of commands appropriate to where you are in the interface.

Add Delete	۲
Cut Copy Paste	
Open Source Document Translate Selected	
Import	۲
Update Versions	۲
Publication	۲
Properties	

Figure 3-4 Popup menu example

Popup menus can be opened from different parts of the interface. The commands available will vary, depending on where you are in the interface and what you right-click.

There are many "right-click opportunities" in Site Builder to help you speed up the execution of commands.

TOOLBARS

This section covers the following topics:

- Toolbars (page 3-6)
- ✤ Add Toolbar (page 3-6)
- Customizing the Standard Toolbar (page 3-7)
- Edit Toolbar (page 3-8)
- File Toolbar (page 3-9)
- Moving a Toolbar (page 3-9)
- Large Toolbar (page 3-9)
- Standard Toolbar (page 3-11)
- Template Toolbar (page 3-11)

Toolbars

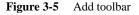
There are two toolbars in Site Builder: standard and large.

- The standard toolbar is the horizontal series of buttons at the top of the main window, below the menu bar (see Standard Toolbar on page 3-11).
- The large toolbar is the series of labels and buttons down the right side of the window. See Large Toolbar on page 3-9.

The command buttons on the standard toolbar duplicate many of the commands in the menus. To identify a command, hold the mouse briefly over the button and its name will display in a screentip. Some command buttons may be grayed to denote they are temporarily unavailable.

Add Toolbar

The Add toolbar commands on the standard toolbar duplicate three of the four commands on the Add menu: Add Document, Add Reference Page, and Add Publication.





These commands do the following:

- Add Document—Opens the Add Document dialog box so you can add a source document to the publication currently selected in the Publication Hierarchy pane. The Select a Repository dialog box may open first so that you can identify the repository containing the document you want to add. See Selecting a Repository (page 5-8) and Adding a Document (page 5-31).
- Add Reference Page—Opens the Add Reference Page dialog box so that you can add a reference page to the publication currently selected in the Publication Hierarchy pane. See Adding a Reference Page (page 5-53).
- Add Publication—Opens the Publication Properties dialog box so that you can add a subpublication to the publication currently selected in the Publication Hierarchy pane. See Adding a Publication (page 5-3).



Note: The Directory Item command is available only from the Add menu. This command lets you add a folder to your publication. All source documents that have one of the specified file formats and are in that folder at translation time will be translated.

Customizing the Standard Toolbar

The standard toolbar is the horizontal series of buttons at the top of the main window, below the menu bar. You can remove buttons and separators from the toolbar or rearrange the order of the buttons.

- 1. Click **Toolbars** on the View menu and then **Customize** on the submenu to open the Customize Toolbar dialog box.
- 2. To remove a toolbar button or separator, select the button or separator under Toolbar Buttons and click **Remove**.
- 3. If you have previously removed a button or separator that you now want to add back to the toolbar, select the button or separator under Available Buttons and click **Add**.
- 4. To change the position of a button or separator on the toolbar, select the button or separator under Toolbar Buttons and click the **Move Up** or **Move Down** button until the button or separator is in the correct position on the toolbar.
- 5. To reset the standard toolbar, click the **Reset** button. The toolbar will now be returned to its original form, with all buttons and separators in place.
- 6. Click **OK**.

You can also remove an individual toolbar button when working in the main window. With the Shift key held down, drag the button off the toolbar and then let go of the mouse. (You cannot remove a separator this way.)

Separators keep related toolbar buttons together. If you create a toolbox, related buttons will always appear on the same line if they are separated by a separator from the adjacent group of related buttons.

Edit Toolbar

The Edit toolbar commands on the standard toolbar duplicate the commands on the Edit menu: Cut, Copy, Paste, and Delete.

Figure 3-6 Edit toolbar



These standard Windows commands work the same way in Site Builder:

- Cut—Removes the selected item from the project: a source document or reference page from the Contents pane, or a publication from the Publication Hierarchy pane.
- Copy—Makes a copy of the selected item: a source document or reference page from the Contents pane, or a publication from the Publication Hierarchy pane.
- Paste—Pastes into the project the last item that was copied by use of the Copy command during your current session in Site Builder.
- Delete—Removes the selected item from the project: a source document or reference page from the Contents pane, or a publication from the Publication Hierarchy pane. The deleted item cannot be returned to the project by using the Paste command.

The Cut, Copy, and Delete commands are available only if you have selected a publication in the Publication Hierarchy pane or a document or reference page in the Contents pane. The Paste command is active only if you have used the Copy command during your current session in Site Builder.

File Toolbar

The File toolbar commands on the standard toolbar duplicate some of the commands on the File menu: New, Open, Save.

Figure 3-7 File toobar



These commands do the following:

- New—Starts a new project (by opening a copy of Default.tcp, the default project file).
- Open—Opens an existing project.
- Save—Saves an existing project. In the case of a new project that has not yet been saved, opens the Save As dialog box.

Moving a Toolbar

The standard toolbar in the Site Builder main window is movable and dockable. It can be positioned anywhere on the desktop. You can also re-arrange the order of the buttons and delete some, if you want (see Customizing the Standard Toolbar on page 3-7).

You can move the large toolbar the same way, but you can position it only within the main window. To move the standard toolbar

- 1. Click a blank portion of the toolbar and, with left mouse button held down, drag the toolbar to its new position. Note how the outline of the toolbar thickens once it is removed from the main toolbar.
- 2. Drop the outline of the toolbar in the desired position by letting go of the mouse button.

The toolbar now has its own title bar, name, and Close button. You can reshape the toolbar into a vertical or horizontal row of buttons, or turn it into a square or rectangular toolbox.

Large Toolbar

The large toolbar duplicates some of the buttons on the main toolbar.

Wizard—Opens the Add a Document wizard, which shows you how to add a source document to a new or existing publication. Command also available from the Startup Screen.

- Add Document—Opens the Add Document dialog box, which allows you to select a source document to add to a publication. Command also available from the Add menu and the standard toolbar.
- Add Reference Page—Opens the Add Reference Page dialog box, which allows you to add a reference page to a publication. Command also available from the Add menu and the standard toolbar.
- Add Publication—Opens the Add Publication dialog box, which allows you to add a publication to the publication. Command also available from the Add menu and the standard toolbar.
- Choose Template—Opens the Choose Template dialog box, where you associate a template with a source document. Opens automatically when you add a document to a publication. But you can enter the dialog box at any time to change the association between a template and a document.
- Edit Template—Opens the Edit Template dialog box, where you can move between the four template editing options without returning to the main window. You can also preview any document associated with the selected template.
- Update Versions—Updates source documents in the repository by checking for the latest versions. Can be used when your source documents are from Content Server or from an FTP or HTTP site. (Site Builder automatically recognizes when files in the file system need to be updated.)
- Translate—Runs an incremental translation to translate only those source documents that have changed since the last translation of the publication.
- View—Opens the default Web browser or other viewer associated with Site Builder. If you have several Web browsers associated with the program, you can click the down arrow to the right of the default viewer name and select another from the popup menu that appears.
- Stage—Copies translated output from the file system to a staging server in Content Server.
- Publish—Copies translated output from the file system to a publishing server in Content Server.

You can move the large toolbar anywhere in the main window.

Standard Toolbar

The standard toolbar is the horizontal series of buttons at the top of the main window, below the menu bar.

Figure 3-8 Standard toolbar



The standard toolbar duplicates commands on the various menus. The command buttons are grouped to reflect their assignment on the menus.

You can drag and drop the standard toolbar to position it anywhere in the main window or dock it along either side, or the bottom, of the window. You can also resize the toolbar to create a toolbox. Finally, you can remove individual buttons, if you want. See Customizing the Standard Toolbar (page 3-7).

Template Toolbar

The Template toolbar commands on the standard toolbar duplicate the commands on the Template menu: Element Setup, Formatting, Navigation, and Globals; also, Choose Template, Edit Template, and Manage Templates.

Figure 3-9 Template toolbar



These commands do the following:

- Element Setup—Opens the Element Setup property sheet, where you edit and promote the elements in your project. See Element Setup (page 6-16).
- Formatting—Opens the Formatting property sheet, where you format your Web pages. See Formatting (page 6-96).
- Navigation—Opens the Navigation property sheet, where you set navigation between and within Web pages. See Navigation Topics (page 6-134).
- Globals—Opens the Globals property sheet, where you set global options for your Web publication. See Globals (page 6-173).

The other three commands open dialog boxes:

- Choose Template—Where you choose the template you want to associate with a source document. You can change this association at any time. See Choosing a Template (page 6-3).
- Edit Template—Where you can edit your template by previewing the source document and opening the four property sheets. See Using the Edit Template Dialog Box (page 6-7).
- Manage Templates—Where you create new templates, import and export templates, and link to an external template. See Managing Templates (page 6-12).

The four property sheets can also be opened from the Edit Template dialog box.

TOOLBAR COMMANDS

This section covers the following topics:

- Run Toolbar Commands (page 3-12)
- Publication Toolbar Commands (page 3-13)
- Server Toolbar Commands (page 3-13)

Run Toolbar Commands

The Run toolbar commands on the standard toolbar duplicate some of the commands on the Run menu: Update All Versions, Incremental Translation, Stage, and Publish.

Figure 3-10 Run toolbar



These commands do the following:

Update All Versions—Updates source documents so that your translation includes the latest versions of these documents in a repository. For use when the source documents are from an FTP or HTTP site, or a content server. Site Builder automatically recognizes when source documents in the file system are dated and will automatically translate these files with the next incremental translation. (However, you must formally update source documents in a Directory Item on the file system.)

- Incremental Translation—Runs an incremental translation of the project, translating only those documents that have changed since the last translation. If you are using a repository other then the file system, you should use the Update Versions command first.
- Stage—Copies translated output from the file system to a content server designated for staging.
- Publish—Copies translated output from the file system to a content server designated for publishing.

Publication Toolbar Commands

The Publication toolbar commands on the standard toolbar duplicate the commands on the Publication menu: Layout, Associated Files, and Publication Properties.

Figure 3-11 Publication toolbar



These commands do the following:

- Layout—Opens the Layout dialog box, where you create a frameset or HTML table for your publication. See Creating a Frameset (page 5-59) and Creating an HTML Table (page 5-73).
- Associated Files—Opens the Associated Files dialog box, where you can list files that are associated with the project but are not formally a part of it. See Associating a File With a Publication (page 5-99).
- Publication Properties—Opens the Publication Properties dialog box, where you can change the name or title of the publication, add a Map file property, and change the output directories. See Publication Properties (page 5-6).

Server Toolbar Commands

The Server toolbar commands on the standard toolbar duplicate commands on the Server menu.

Figure 3-12 Server toolbar



These commands do the following:

- Project Export wizard—Lets you copy a project file and its related source documents and graphics files to a shared network location, to be accessible to Site Server for translation. The command is grayed out unless you have a saved publication open in Site Builder.
- Site Scheduler—Opens a utility that lets you schedule the automatic translation of projects by Site Server.

APPLICATION OPTIONS

This section covers the following topics:

- Application Options (page 3-14)
- Setting Application Options (page 3-16)
- Options Available in Site Builder (page 3-16)

Application Options

Application options are user-specific for a given machine. They apply only to translations on that machine. If multiple users share a machine and set different options, the options in effect will be those that have been set by the user who is currently logged in.

The Application Options dialog box has three tab dialogs with the following settings.

Logging

- Level—Select the level of logging you want to use. See Setting Up the Translation Log on Site Builder (page A-5).
- Log file—Type the path and file name for the log file you want to use. (You can change the name of the log file as well as the path.) Alternatively, use the Browse button to search for the directory you want to use.
- HTML or Text—Choose a format for the log file. With HTML formatting enabled, you can quickly find what you are looking for using a color-coded logging system. The HTML log file includes a set of preferences for customizing the layout of the log file.
- Reset log file for each translation—Select this option to create a log file just for the current translation. Clear this check box to create a continuous record of all logging.

General

- Word Processor Default Character Style Name—An important option if you are using an international version of Microsoft Word. See Working With International Versions of Microsoft Word (page 6-50).
- Default Output Extension—You can change the extension to match a scripting language in your project if you prefer (such as ASP, JSP, and IdocScript). Once you change this setting, it will be used on all new documents added to your publication (but not to any existing documents). See Specifying the Extension for Output Files (page 5-106). The wml extension is the default for WML projects (see Creating a WML Project on page 4-10).
- Default Output File Names—The default setting is to use the file name of the source document for the output file name. Click Use this property for file naming if you prefer to use a metadata property (e.g., dDocAuthor or dDocTitle) for files from the content server. You can also choose to strip the file extension from the original file name at the same time.

Dialogs

- Startup Screen—Lets you toggle between showing and hiding the Startup Screen each time Site Builder opens. See Showing the Startup Screen (page 3-19).
- CSS Caution—Alerts you when formatting characters and paragraphs with CSS turned on. See Showing the Caution for Using CSS (page 3-20).
- Select a Repository—Lets you toggle between showing and hiding the Select a Repository dialog box. See Showing the Select a Repository Dialog Box (page 3-21).
- Print Warning—Alerts you when adding a Print button without the required options enabled in the Map File / Print Publication tab dialog of the Project Options dialog box. See Enabling the Print Functionality (page 6-139).
- Update Versions—Determines whether the Update Versions dialog box displays before each translation. See Update Versions Command (page 8-9).
- Project Type—Determines whether the New Project Type dialog box displays when you start a new project. This dialog box lets you toggle between creating an HTML project or a WML project. (See Creating a WML Project (page 4-10).)
- Selective Incremental Translation—Lets you toggle between showing and hiding the Selective Incremental Translation dialog box. See Showing the Selective Incremental Translation Dialog Box (page 3-20).

Show Template Export Format—Lets you toggle between showing and hiding the Template Export Format dialog box. See Exporting a Template (page 6-5).

Note: You can also set project options in Site Builder, which are saved with the project and apply even if you export the project file to a network location or schedule the project for translation by Site Server. See Project Options (page 4-7).

Setting Application Options

The Application Options dialog box contains a number of options that are set by default in Site Builder and that apply to whatever projects you create. The options are user-specific for a given machine settings and will apply to all projects you translate on the machine until you decide to change them.



Note: If multiple users share a machine and set different options, the options in effect will be those that have been set by the user who is currently logged in.

- 1. Click Application Options on the View menu to open that dialog box.
- 2. Click the tab to open the appropriate tab dialog.
- 3. Under the appropriate heading, change the setting for the option you want to change.
- 4. Click OK.

Options Available in Site Builder

You can set two types of options in Site Builder: application and project.

- Application options are user-specific for a given machine. They apply to all projects you translate on that machine, but no longer apply once you export the project file to a network location or schedule the project for translation by Site Server. See Application Options (page 3-14) for more details.
- Project options are specific to the project and are therefore saved with the project file. They apply to your project whether you run it locally, export the project file to a network location, or schedule the project for translation by Site Server. See Project Options (page 4-7) for more details.

VIEWERS

This section covers the following topics:

- Changing the Default Viewer (page 3-17)
- Viewer Toolbar Command (page 3-17)

Changing the Default Viewer

When you install Site Builder, Site Builder will select a browser on your machine as the default viewer for viewing the Web pages you create. You open this browser by choosing Launch Viewer on the Viewers menu or clicking the View button on the standard toolbar or large toolbar.

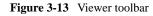
You can change the default viewer at any time.

- From the Viewers menu, choose the viewer you now want to use, or
- On the large toolbar, click the down arrow next to the button displaying the icon and name of the default viewer and choose the new viewer from the popup menu that appears.

The new default browser will now open each time you view Web pages in Site Builder. If the viewer you want to use is not currently associated with Site Builder, you can set up the viewer by choosing Setup from the Viewers menu. See Setting Up a Viewer (page 7-2).

Viewer Toolbar Command

The Launch Default Viewer command on the standard toolbar duplicates the Launch Viewer command on the Viewers menu. The toolbar icon matches the browser you are using, and as such could look like either of the following graphics.



3

This command does the following:

Launch Default Viewer—Launches the default viewer for viewing the Web publication you have created in Site Builder. You must first translate a project for the viewer to open.

If your publication has a frameset, a Web browser will open the frameset, no matter what is selected in the Contents pane. Otherwise, the browser will open the first document or reference page selected in the Content pane. (If nothing is selected and the publication has no frameset, the browser will display the first page of the publication.)

The toolbar icon is determined by the default viewer. You can change the default by choosing another viewer from the Viewers menu. Alternatively, you can click the down arrow to the right of the default viewer shown on the large toolbar and choose another viewer from the popup menu that appears.

SHOWING AND HIDING TOOLBARS

This section covers the following topics:

- Displaying and Hiding the Large Toolbar (page 3-18)
- Displaying and Hiding the Standard Toolbar (page 3-18)
- Displaying and Hiding the Status Bar (page 3-19)

Displaying and Hiding the Large Toolbar

The large toolbar on the right of the main window can be hidden from view.

To hide the large toolbar:

- 1. From the View menu, choose Toolbars.
- 2. From the Toolbars submenu, choose Large Toolbar.

The large toolbar is now hidden. To show the toolbar again, repeat this action.

Displaying and Hiding the Standard Toolbar

The standard toolbar in the main window can be hidden from view.

- 1. From the View menu, choose Toolbars.
- 2. From the Toolbars submenu, choose Standard Toolbar.

The standard toolbar is now hidden. To show the toolbar again, repeat this action.

You can also customize the standard toolbar by removing buttons from the toolbar or changing the order of the buttons. See Customizing the Standard Toolbar (page 3-7).

Displaying and Hiding the Status Bar

The status bar is the horizontal bar at the bottom of the main window. When you pass your cursor over a command in the menu bar or toolbar, the status bar displays a short explanation of the command. You can hide the status bar, if you want.

- 1. From the View menu, choose Toolbars.
- 2. From the Toolbars submenu, choose Status Bar.

The status bar is now hidden. To show the status bar again, repeat this action.

SHOWING DIALOG BOXES

This section covers the following topics:

- Showing the Startup Screen (page 3-19)
- Showing the Caution for Using CSS (page 3-20)
- Showing the Selective Incremental Translation Dialog Box (page 3-20)
- Showing the Warning When Adding a Print Button (page 3-21)
- Showing the Select a Repository Dialog Box (page 3-21)

Showing the Startup Screen

The Startup Screen opens each time you start Site Builder. It provides different ways to start a project and also some learning opportunities. If you don't want the screen to show the next time you open Site Builder, select the **Don't show this screen again** check box. If you have selected this check box and want to view the Startup Screen, do the following.

- 1. From the View menu, choose Application Options to open that dialog box.
- 2. Click **Dialogs** to open that tab dialog.
- 3. Select the Show Startup Screen when starting Site Builder check box.
- 4. Click OK.

The next time you start Site Builder, the Startup Screen will appear.

If you want to view the Startup Screen at any time, click **Show Startup Screen** on the Help menu.

Showing the Caution for Using CSS

Site Builder can be configured to generate formatting with standard HTML tags or with CSS (cascading style sheet) markup. Enabling CSS for a template changes options in the Character and Paragraph tab dialogs in **Formatting**.

Since support for the advanced paragraph features may vary significantly between browsers, a caution appears onscreen when you click the Advanced button in the Paragraph tab dialog of **Formatting** to open the Advanced Settings dialog box.

If you click the **Don't show this warning again** check box, you may later want this caution to appear as a reminder.

- 1. TFrom the View menu, choose Application Options to open that dialog box.
- 2. Click the **Dialogs** tab to open that tab dialog.
- 3. Select the Show Caution when using advanced paragraph formatting with CSS turned on check box.
- 4. Click OK.

This setting is user-specific on a given machine. It applies to all projects run on the machine by the user logged in at the time of the change.

Showing the Selective Incremental Translation Dialog Box

The Selective Incremental Translation dialog box displays the items that are currently selected for translation, and the items that are currently omitted from translation. You can easily add or remove any item from translation by placing a check mark to the left of the item if you want to translate it, or clearing the box if you do not.

- To hide the Selective Incremental Translation dialog, click **Don't show this screen again** from within the dialog box. You may choose to hide the dialog box if you frequently use the selective translation option and do not want to see all of the items that can be translated.
- To show the Selective Incremental Translation dialog box again after it has been hidden, click Show Selective Incremental Translation dialog on the Dialogs tab in Application Options.

If you choose to hide the Selective Incremental Translation dialog box, you can still selectively translate items using the methods described in Translating Source Documents (page 5-41).

Showing the Warning When Adding a Print Button

The print functionality is set up by default so that when you add a Print button to a publication it should work immediately.

The first time you try to add a Print button to a publication and the print functionality is not enabled, the Print Publication Setup Warning dialog box will appear. If you click the **Don't show this warning again** check box, you may later want this warning to appear as a reminder.

- 1. From the View menu, choose Application Options to open that dialog box.
- 2. Click the **Dialogs** tab to open that tab dialog.
- 3. Select the Show warning when adding a print publication button check box.
- 4. Click OK.

This setting is user-specific on a given machine. It applies to all projects run on the machine by the user logged in at the time of the change.

Showing the Select a Repository Dialog Box

In Site Builder you can work in your file system or in Content Server. You can also add documents to a publication from an FTP or HTTP site.

You make your selection in the Select a Repository dialog box, which opens by default the first time you you add a source document (see Adding a Document on page 5-31) or Directory Item (see Adding a Directory Item on page 5-89) to a project. Once you select a repository from the drop-down list, you can hide this dialog box from view as you work in Site Builder.

If you later want to add source documents or Directory Items from another source, you need to show the Select a Repository dialog box again.

- 1. Click Application Options on the View menu to open that dialog box.
- 2. Click **Dialogs** to open that tab dialog.
- 3. Select the check box Show Select a Repository dialog box when adding a source document or directory item to a publication.
- 4. Click OK.

The Select a Repository dialog box will open the next time you choose the Add Document or Add Directory Item command. You can show or hide the dialog box at any time by selecting or clearing this option.

This setting is user-specific on a given machine. It applies to all projects run on the machine by the user logged in at the time of the change.

You can create a project by adding documents and directory items from different sources. To do this, you would want the Select a Repository dialog box to open each time.

C h a p t e r

CREATING AND MANAGING PROJECTS

This section covers the following topics:

- Projects (page 4-1)
- Exporting a Project (page 4-13)
- Path Conflicts (page 4-18)

PROJECTS

This section covers the following topics:

- ✤ About Projects (page 4-2)
- The Project File (page 4-3)
- The History File (page 4-3)
- Project Setup (page 4-4)
- Editing the Default Project File (page 4-5)
- ✤ About the Default Project File (page 4-6)
- Customizing the Default Project File (page 4-6)
- Project Options (page 4-7)
- Setting Project Options (page 4-9)
- Versioning the Project File (page 4-9)

- Copying a Project File (page 4-10)
- Creating a WML Project (page 4-10)
- Starting a Project (page 4-11)
- Saving a Project File (page 4-12)

About Projects

A Content Publisher project consists of a project file, source documents, related graphics, templates, and any other files associated with the project.

Each project has a unique project file. A copy of the default project file Default.tcp is already open when you start a new project. You can save the file with a new name to capture all key information about the project you are creating. The Publication Hierarchy pane displays a root publication. The Contents pane is empty.

You use the root publication as a container for the source documents you want to translate, their associated templates, the reference pages you want to build, and the output pages that Site Builder creates when you translate. You can also add publications to the root publication to create a publication hierarchy.

Each publication when added in this way becomes a subpublication, which, in turn, can contain source documents, reference pages, templates and output pages. The Contents pane displays the contents of whichever publication is selected in the Publication Hierarchy pane.

If you open an existing project, the project file name appears in the title bar, the name of the root publication appears at the top of the Publication Hierarchy pane and just above the Contents pane, and the Contents pane displays the publication's contents: output pages, source documents, and templates.

If you have moved any source documents or removed any output directories since the last time you worked in the project, Site Builder will recognize this during project path verification as it loads the project file. A series of dialog boxes will appear so that you can direct Site Builder to the necessary files or output directories.



Note: Default.tcp is used to create HTML projects in Site Builder. A second default project file, DefaultWML.tcp, is available for creating WML projects. See Creating a WML Project (page 4-10).

The Project File

Each project has its own project file, which is used to capture key information about the project. The project file helps you create, maintain, and archive a Web publication.

When you start a new project, Site Builder creates an empty project (its name, "Unnamed," appears at the top of the Publication Hierarchy pane and immediately above the Contents pane) and opens a default project file ("Unsaved" displays in the title bar).

When you save a project file, you capture the following information about the publication:

- The Publication Hierarchy (page 5-8).
- The names of the output page that Site Builder will create when it translates the source documents and builds any reference page.
- The full path and file name of each source document.
- The template associated with each source document and the formatting instructions that each template contains
- The output directory for the output pages and any graphics files

When you open an existing project file, the Publication Hierarchy pane displays the publication hierarchy and the Contents pane displays key information for each publication: output pages, location of source documents, and templates. (The output directories can be viewed in the Publication Properties dialog box.)

If you have moved the project file, source documents, or any custom graphics since you last saved the project file, the Publication Paths Verification dialog box will appear so that you can reconcile the paths you are now using with the ones you were using before. See Path Verification (page 4-19).

If you are opening a project file from a repository, be sure to select the project file, not its companion history file. See Opening a Project File From Content Server (page 5-23).

The History File

When you create a project file, Site Builder automatically creates a companion history file, which it uses to track the date and time-stamp of each source document. As a result, when you run an incremental translation, Site Builder can identify those documents that have been updated since the last translation and translate only those.

So if you create the new project file "My Project," Site Builder will create two files: My Project.tcp (the project file) and My Project.tch (the history file). Should you delete the

history file, Site Builder will create a new one and run a full translation the next time you translate, even if you choose Translate for an incremental translation.

When you check a project file into Content Server for the first time, you actually check in both the project file and its companion history file, but you won't be aware of checking in the latter and you won't see it in Content Server. When you check out the project file, the history file is automatically checked out, too. As with source documents, you are always working with temporary versions of both the project file and the history file.

To reduce file size, both project and history files are automatically zipped by Content Publisher. (Though zipped, they retain their .tcp and .tch extensions.)

Project Setup

The process of setting up a project for translation takes place primarily in the main window. It consists of:

- Opening a new project
- Adding subpublications to the root publication, if necessary
- Adding source documents to each publication in the publication hierarchy
- Associating templates with those source documents
- ✤ Adding reference pages to each publication
- Designating output directories
- Creating a frameset for each publication, if necessary
- Saving key data in a project file

Once project setup is complete, you can begin editing the templates associated with the source documents. You select each template, in turn, in the Contents pane and work through each of four property sheets to set the various options that determine how the Web pages you create will look and behave.

The four property sheets—**Element Setup, Formatting, Navigation**, and **Globals**—can be opened from the Template menu, the standard toolbar, and the Edit Template dialog box.

You can use them in any order, but for a new publication, you should start with **Element Setup**. Any fine-tuning of elements or changes to ranks, styles, or patterns should be done before you start formatting the templates. **Element Setup** is especially important if you're working with a manually formatted document.

Editing the Default Project File

Default.tcp, the default project file, is installed in your Content Publisher directory. A copy of the file opens each time you start a new project in Site Builder.

You may want to edit this file, for example, to import some templates from a previous version of Site Builder so that these are available each time you start a new project in version 10gR3. Before doing so, you should create a backup file, Default.bak, and also export the templates to create standalone files, if you haven't already done so.

- Start Site Builder. A copy of Default.tcp opens by default (the title bar simply reads <Unsaved>, while the root publication in the Publication Hierarchy pane is "Unnamed").
- 2. Click Manage Template (
- 3. In the Manage Template dialog box, click the **Import** button to open the Template Import dialog box.
- 4. Locate the folder containing the template file you want to import. Select the file and click **Open**.
- 5. Your template is now listed in the Manage Templates dialog box (as an internal template).
- 6. Click **OK** to return to the main window.
- 7. Click **Save As** to open the Save As dialog box. Locate and select Default.tcp in the Content Publisher directory.
- 8. Click Save.

However you edit the default project file, the changes will be immediately available each time you start a new project. (You can even change some of the default template settings. To do this, add some source documents to activate the template commands, make the template changes you want, and then delete the source documents before you save the project file as Default.tcp, writing over the existing file.)

If you want, you can continue to use the Default.tcp file shipped with earlier versions of Site Builder, by copying the old file into your Site Builder directory. (To avoid overwriting the default project file shipped with Site Builder 10gR3, you may want to first create a backup copy of the older version of the default project file.)

Version 7.2, 7.5, and 7.6 project files will automatically run in version 10gR3. If your previous default project file is pre-7.2, when you open Site Builder with that project file,

click Save when the Site Builder dialog box appears. This will convert the old project file to the new format.

If the installed version of Default.tcp becomes corrupted or ever needs to be replaced for whatever reason, you can find a copy of the file in the Support folder on your Content Publisher product disc.

For more information about templates, see Managing Templates (page 6-12).

About the Default Project File

Each time you start a new project, Site Builder opens a copy of Default.tcp, the default project file. As a result, several existing templates (Administration, etc.) are already part of the project. These are intended to help new users create great-looking Web pages on their first try.

Each template contains basic formatting for certain styles (Title, Heading 1, etc.), as well as three character patterns (HTTP, WWW, Email), which can be used to create live Web or email links. See Template Summary (page 6-3) for more about default settings.

Default.tcp is in the Content Publisher directory. So if you want to change the settings of the default project file, start a new project and change the project and template settings, as necessary. See Customizing the Default Project File (page 4-6) for more information.

Before you change Default.tcp, you should save the original as Default.bak so that it is always available as a backup.

Default.tcp is used to create HTML projects in Site Builder. A second default project file—DefaultWML.tcp—is available for creating WML projects. See Creating a WML Project (page 4-10) for more information.

Customizing the Default Project File

Each time you start a new project, Site Builder opens a copy of Default.tcp, the default project file, which contains a number of templates. (See About the Default Project File on page 4-6.)

You can easily change these templates and make a modified Default.tcp available to others in your organization who are using Site Builder. By copying this file into their Content Publisher directory, other users will have the same default settings available each time they start a new project. This is especially useful if you use standard style sheets or want to create a specific look and feel for your Web site. The following are ways to customize the default project file:

Deleting a template—You can delete a template in Default.tcp at any time. For more information, see Deleting a Template (page 6-5).

Importing a template—You may want to import a template from one project into another. Also, if you have modified a template in a particular project and realize you want the modified version to be available by default each time you start a new project, you can export the template from that project and import it into Default.tcp, overwriting the template of the same name in Default.tcp in the process. See Importing a Template (page 6-13).

Modifying a template—You can use the many editing options throughout Site Builder. But first you must add a document to the new publication to associate with each template you want to modify. You can delete this document later, when you've made your changes to the templates and are ready to save Default.tcp.

Ideally, this document should contain the styles from a style sheet you plan to use for your Web publishing activities. Alternatively, it could contain text formatting common to your manually formatted source documents, or be a document containing just two styles, Title and Heading1, with sample text associated with each style.

Before modifying any of the templates in Default.tcp, see Template Summary (page 6-3).

Changing a template name—Once you modify a template, you may want to change its name. A name such as "Policy and Procedures" or "Press Releases" may be more meaningful than "Administration," and could suggest which source documents should be associated with the template. See Template Names (page 6-7).

Creating a new template—You can create new templates at any time, and re-associate templates with source documents whenever you want. See Creating a New Template (page 6-4).



Note: Before you change Default.tcp, you should save the original as Default.bak so that it is always available as a backup.

Project Options

Project options are specific to the project and are therefore saved with the project file. They apply to your project whether you run it locally, export the project file to a network location, or schedule the project for translation by Site Server. The Project Options dialog box has three tab dialogs, containing the following settings:

General

- HTML Generation—Gives you the option of choosing Windows-specific characters instead of the ISO Latin-1 character set supported by HTML. See HTML Generation (page 5-109).
- Output Character Set—The default Unicode option ensures that the widest possible array of characters is available for your output. Not supported by older browsers (version 2.0 and earlier). See Output Character Sets (page 5-108).
- Containing frame name—The link used to navigate between frames. Should be changed if your publication is to be placed within an existing frameset. See Targeting a Frameset (page 5-65).
- Publish with errors—The option to publish a project even where Site Builder has failed to translate one or more source documents. See Publishing With Errors (page 8-11).
- No Script Support—Add any text to be displayed in your browser when an output page contains scripts and the browser may not support them. The addition of text for No Script Support isn't generally required, because Web publications built with Site Builder will still function when scripting is turned off. The only time you might want to use this feature is when you have created a Web publication that includes the Print button and you are not certain that all users will be able to use this functionality successfully.

File Naming

- File Names—Check Force all file names to lower case if the files you create will be passed to a case-sensitive server, such as a Unix machine. Note that Use ISO 9660 compliant file names not only forces all output file names to upper case but also truncates any long names to eight characters. See Complying With ISO 9660 (page 5-107).
- Output name prefix—The option to add a prefix to output files in a publication. See Adding a Prefix to Output File Names (page 8-79).

Map File / Print Publication

- Map file—Use to create an XML file that describes the output of your project on the Web site. See Map File (page 6-142).
- Print Publication—Reference to the script required in order to use the Print button.
 See Printing the Publication (page 6-141).

Repositories

- Output page name—See Output Page Names (page 5-105).
- Enable conditional disclosure—See Conditional Disclosure (page 8-53).

You can also set application options in Site Builder, which apply to whatever projects are translated on that machine. See Application Options (page 3-14).

Setting Project Options

The Project Options dialog box contains a number of options that are saved with your project file and apply to that project wherever it is run. You can change these settings, if you want.

- 1. Click **Project Options** on the View menu to open that dialog box.
- 2. Click the tab to open the appropriate tab dialog.
- 3. Under the appropriate heading, change the setting for the option you want to change.
- 4. Click OK.

Versioning the Project File

With an existing project open in Site Builder, you can create a new version of the project file at any time. You can also add comments to the document information for the project file.

When you schedule a project for translation on Site Server, you can choose to overwrite the existing version of the project file in the content server or create a new version.

- 1. With your project open in Site Builder, click **Save** () on toolbar or choose **Save** from the File menu. The Project Check In (New Revision) dialog box opens.
- 2. In the Comments box, type any information you want to associate with the new version you are creating. (You can change any of the editable values.)
- Click the Assign Info button to save your comments with the new version of the project file. The Project Check In (New Revision) dialog box closes.

If you want to create a new project file based on an existing project file, use the Save As command instead. In the Project Check In dialog box, you can give the project file a new name and change any of the properties of the original project file.

Follow these steps to create a new version of a project file in Site Server:

When you schedule projects for translation by Site Server, you can choose to overwrite the version of the project file in Content Server or create a new version each time the project runs.

- 1. Open Site Scheduler (click Site Scheduler on the Server menu in Site Builder).
- 2. Click **New** () on the toolbar to open the New Task dialog box.
- 3. Select **Content Server** from the Repository drop-down list, and then click **Browse** opposite the Project text box.
- 4. In the Select a Project dialog box, conduct a search for project files and then click the appropriate **Select** button for the one you want to schedule.
- 5. The Select a Project dialog box closes and the Content Publisher dialog box opens.
- 6. Click Yes to create a new revision of the project file in Content Server or No to overwrite the latest version in the content server. If you click Yes, a new version of the project file will be created each time Site Server runs the project and there has been a "meaningful" update (e.g., new documents have been added to a Directory Item).
- 7. Complete the other information in the New Task dialog box, as appropriate.

Copying a Project File

You can copy a project file just like any other file. You may want to do this to shortcut the process of creating a new project.

For example, you might want to create a new project using some or all of the templates of another project but none of the documents of that project. Once you copy the project file, you can delete all the documents in the project and retain the templates.

To copy a project file, open the project file and immediately save it under a new name.

Alternatively, if the file is in the file system, you can copy a project file in Windows Explorer just as you would any other file.

Creating a WML Project

You can create a WML project in Site Builder, publishing your WML output to a WAP server for it to be available via Internet-ready phones.

For more information on WML projects, see "Creating a WML project," a PDF file in the Documentation folder of your Content Publisher directory (the file is also available on your Content Publisher product disc).

Starting a Project

Each time you start Site Builder a default project file is already open. If you open an existing project, the project file name appears in the title bar and project details appear in the Publication Hierarchy and Contents panes.

Follow these steps to start a new project:

- 1. Do one of the following:
 - On the Startup Screen, select Blank Publication and click OK.
 - ♦ Click New (□) on the toolbar.
 - ✤ Choose New from the File menu.
- 2. In the Publication Properties dialog box, type over "Unnamed" to name the new publication. Change the default output directories, if you want.

You have named the publication. You still have to name the project file, which you do by choosing Save As from the File menu.

Follow these steps to start an existing project:

- 1. Do one of the following:
 - On the Startup Screen, select **Open an existing publication** and click **OK**.
 - ♦ Click Open () on the toolbar.
 - Choose Open from the File menu.
- 2. In the Select a Repository dialog box, select the repository containing the project file you want to open.
- 3. If you select the file system, the Open dialog box will open. Locate the appropriate drive and folder, open the folder, and select the project file.
- 4. If you select Content Server, and more than one content server is registered on the machine on which Site Builder is running, the Choose a Content Server dialog box will open. From the drop-down list, select the content server in which the project file resides, and click **OK**.
- 5. On the Search page, search for the project file you want to open. Click **Select** to open the file.

Alternatively, you can open an existing project by choosing one of the project files listed at the bottom of the File menu (Site Builder lists the last four projects you worked on).



Note: You can switch from one project to another at any time. Selecting a different project closes the current one, so it is a good idea to choose Save before you click Open. (Site Builder prompts you to save changes if you forget.)

Saving a Project File

When you save a project file you save key information about the project, including the publication hierarchy, the names of all output pages, the path and file name of each source document, the template associated with each source document, and the location of output directories.

The next time you open the project file, the Publication Hierarchy pane will display the publication hierarchy, and the Contents pane will initially display key details of the root publication.

Follow these steps to save a new project file:

- 1. From the File menu, choose Save As to open that dialog box.
- 2. In the File Name text box, type over "Unnamed.tcp" to give the project file a new name. Change the drive and path for the new project file, if necessary.
- 3. Click Save.

Follow these steps to save an existing project file:

- 1. Choose **Save** (**[]**) on the toolbar, or Choose **Save** from the File menu.
- If the file is in Content Server, the Assign Project Check In (New Revision) dialog box will open. Enter comments in the Comments box, if appropriate, and click the Assign Info button.

You can save a project file to the file system or Content Server, but not to an FTP or HTTP site. (See Creating a Project File in Content Server on page 5-20.)

You select the appropriate repository in the Select a Repository dialog box, which should open when you click Save As to save a new project file. If you need to display this dialog box, click Application Options on the View menu and then switch to the Dialogs tab dialog to select the appropriate option.

If you are saving the file to Content Server and you have more than one content server registered on your machine, the Choose a Content Server dialog box will open for you to choose the content server you want to save the file to.

EXPORTING A PROJECT

This section covers the following topics:

- Project Export Wizard (page 4-13)
- Starting the Project Export Wizard (page 4-14)
- Checking Output Directories (page 4-15)
- Checking Source Directories (page 4-16)
- Editing the Destination Directories (page 4-16)
- Ready to Export (page 4-17)

Project Export Wizard

Once you create publications in Site Builder, you may want to move them to a shared directory on the network so that they can be placed on a Web site. Or you may simply want to transfer them to a co-worker. You can do this easily with the Project Export wizard.

The Project Export wizard can copy the project file, all source documents, and custom graphics to any shared directory in your organization's network. It also "fixes up" the project file in the process.

The wizard can copy just the project file or all of the following files to the shared network location:

- project file
- \diamond source documents
- custom graphics (including those from the gallery)
- ✤ associated files

With the wizard, you specify the directories containing the files to be copied. The wizard copies only project-related files from those directories. Any graphics linked to source documents should be listed in the Associated Files dialog box; otherwise, they will have to be copied separately to the new location and possibly re-linked.

The wizard does not move a linked template. If a project file contains a link to an external template in a network location, the assumption is that the project file will still have access to the location after it is moved.

When you export project files using the wizard, Site Builder generates a report summarizing all the directories and files for the publication. The report project.pfl, where "project" is the name of the project file) is placed in the original source directory of the project file.

Starting the Project Export Wizard

Once you create publications in Site Builder, you may want to move them to a shared directory on the network so that they can be placed on a Web site. Or you may simply want to transfer them to a co-worker. You can do this easily with the Project Export wizard.

The Project Export wizard can copy the project file, all source documents, custom graphics, and associated files to any shared directory in your organization's network. It also "fixes up" the project file in the process.

Starting Project Export wizard

You are ready to use the wizard once you have a completed, saved project currently open in Site Builder.

- 1. In Site Builder, click **Project Export Wizard** (1) on the toolbar.
- 2. On the Welcome screen, enter the path and name of the shared directory in the Shared Destination Directory text box, or click **Browse** to locate the directory you want to use.
- 3. Click Next.

If as you work through the wizard you are in doubt about a particular option, click the Help button for a topic that provides information specific to that screen.



Note: When you move a project for the first time, Project Export wizard captures all the essential details about the move. The next time you start the wizard with that project open in Site Builder, the Welcome screen displays the check box Use Record of Previous Export to Expedite This Export.

You can select this check box to copy the project to the same shared directory as before. You will still have to move through each screen, in turn, to finish the wizard. But all the information will be completed in the appropriate text boxes already. You can change the pre-set information if you like.

Checking Output Directories

The Project Output Directories screen shows the current path and proposed path for output directories. The Project Source Directories column displays the current output directories, as specified in the project file. The Project Destination Directories displays the proposed output directories, as set when you chose a shared directory on the network.

A project can, of course, have multiple output directories. Entries in white show the full paths you set for the output files in your project. You can edit and modify these paths by selecting an output directory and clicking the Edit Destination Directory button to open that dialog box. Any entries in gray are for output directories that have relative paths. These are read-only.

1. Select the subdirectory you want to change and click Edit Destination Directory to open that dialog box.

The current path for the selected subdirectory displays in the Original Project Directory text box. The path to the shared directory is in the Current Destination Directory text box. The third text box, New Destination Directory, is where you specify a new path for the selected subdirectory.

 When you first enter the Edit Destination Directory dialog box, the paths in the Current Destination Directory and New Destination Directory text boxes are the same. Edit the path in the New Destination Directory text box to reflect the location you want to use. Use the Browse button, if necessary, to locate the new directory.

When you change a path for any directory listed in the Project Output Directories dialog box, you also change the paths for all directories listed below that directory in the Project Destination Directories list where a lower directory has the first directory as a stem.

- 3. When you have edited the path, click **OK** to return to the Project Output Directories dialog box.
- 4. Click **Next** to move to the next screen.



Note: The check box at the top of the screen determines whether any fixups will be done to the project file for destination directories. If the box is not checked, the project file will be copied to the destination directory, but no output destination paths will be modified.

Checking Source Directories

In the Project Source Directories screen, the wizard lists the paths of the directories containing all files referenced in the project file. The first column shows the current directories, as listed in the project file. The last column displays those same paths, with the proposed destination (shared directory) replacing the original drive (or the UNC equivalent of the original).

By default, all project-related files will be copied to the shared directory, as the green check marks in the Copy File column signify. You can choose not to copy files in a particular directory. You can also edit the destination directory.

UNC stands for Universal Naming Convention. For example, \\News\Share might be the UNC equivalent of the drive S:\.

Follow these steps to change the copy status of a subdirectory:

- 1. Select the appropriate subdirectory.
- 2. Click Change Copy Status.

The green check mark in the Copy File column changes to a red cross. Any project-related files in that directory will not be copied. You can use the Shift and Ctrl keys with the mouse to select multiple directories.

Follow these steps to edit a destination directory:

- 1. Select the directory you want to edit, and click **Edit Destination Directory** to open that dialog box.
- 2. Press F1 in the Edit Destination Directory dialog box if you need assistance.



Note: The check box at the top of the screen determines whether any fixups will be done to the project file for source directories. If the box is not checked, the project file will be copied to the destination directory, but no source paths will be modified.

Editing the Destination Directories

In the Project Source Directories screen the wizard lists the paths of the directories containing all files referenced in the project file. The first column shows the current directories, as listed in the project file. The last column displays those same paths, with the proposed destination (shared directory) replacing the original drive (or the UNC equivalent of the original).

The Edit Destination Directory dialog box is also used to edit project output directories, in which case references to "Project Source Directories" should be read as "Project Output Directories."

1. Select the directory you want to edit, and click **Edit Destination Directory** to open that dialog box.

The current path for the selected directory displays in the Original Project Directory text box. The path to the shared directory is in the Current Destination Directory text box. The third text box, New Destination Directory, is where you specify a new path for the selected directory. When you first enter the Edit Destination Directory dialog box, the paths in the Current Destination Directory and New Destination Directory text boxes are the same.

2. Edit the path in the New Destination Directory text box to reflect the new location you want to use for this directory. Use the Browse button, if necessary, to locate the directory.

When you change a path for any directory listed in the Project Source Directories dialog box, you also change the paths for all directories listed below this directory in the Destination Project Directory column where a lower directory has the first directory as a stem.

- 3. Click **OK** to return to the Project Source Directories dialog box.
- 4. Select another directory to edit and click the **Edit Designation Directory** button, or click **Next** to move to the next screen of the wizard.

Ready to Export

- 1. Clear the **Generate Project File List** check box if you do not want the wizard to generate a report summarizing all directories and files for the project. If you generate a report, its name will be project.pfl (where "project" is the name of the project file), and it will be placed in the same directory as the project file.
- 2. In the Current Settings box, review both the original and the proposed directories for the project.
- 3. Click Finish.

The Confirm File Replace dialog box will appear as the wizard begins to copy all projectrelated files to the destination directory in the event that a source file will overwrite an existing file in the shared directory. Also, the wizard creates directories, as necessary, to complete the project export operation.

PATH CONFLICTS

This section covers the following topics:

- Causes of Path Conflicts (page 4-18)
- Resolving Conflicting Paths (page 4-18)
- Path Verification (page 4-19)
- Path Verification Complete (page 4-20)
- Replacing a File or Directory (page 4-20)

Causes of Path Conflicts

When you open an existing project, Site Builder runs a "path verification" to verify all paths in the project file for source documents, output directories, and any referenced files (graphics, HTML, etc.) used to create your Web pages. A dialog box appears briefly onscreen as it does this.

Path conflicts can occur for several reasons:

- The project file has been moved since you last used it.
- The source documents have been moved since the project file was last saved, and so the paths are no longer valid.
- ✤ The source documents have been renamed.
- The output directories specified in the project file no longer exist.
- Graphics specified in the project file for the Web pages cannot be located. (Site Builder doesn't check graphics linked to the source documents, only graphics from the Gallery or elsewhere used for navigation buttons, visual aids, and backgrounds.)
- ✤ Graphics specified in the template cannot be located.

Resolving Conflicting Paths

When you open an existing project, Site Builder runs a "path verification" to verify all paths in the project file for source documents, associated files, output directories, and any graphics used to create your Web pages. It also does this when you import a template, to be sure all the graphics specified in the template can be found.

The Project Path Conflict dialog box appears if it encounters duplicate paths for a given file or directory. This may happen, for example, if you have copied the project file and its source documents to another directory, so that these files now reside in two places.

Use one of these methods to resolve conflicting paths:

- Click Use Original Path to use the original path for the file specified in the Original Path text box.
- Click Use Original Path Always to use the original path for the file specified in the Original Path text box plus all other files that have ambiguous resolutions.
- Click Use Proposed Path to use the proposed path for the file specified in the Proposed Path text box.
- Click Use Proposed Path Always to use the proposed path for the file specified in the Proposed Path text box plus all other files that have ambiguous resolutions.

After you have verified the paths for the files and directories, Site Builder displays the Project File Paths Verification dialog box, which summarizes your changes. You should check this carefully to confirm that all files have been successfully re-located and are now specified in the project file or template file according to their new path.

You can then click **OK** to begin work on your project. If you click **Cancel**, none of the changes will be implemented. You can still work in your project, but it will be missing the files that couldn't be verified.

If you click **Cancel All Fixups** in the Project Path Conflict dialog box, Site Builder cancels any fixups you have already approved and return the project file to its original state. You will then exit the dialog box.

Path Verification

When you open an existing project, Site Builder runs a "path verification" to verify all paths in the project file for source documents, associated files, output directories, and any graphics used to create your Web pages. It also does this when you import a template, to be sure that all the graphics specified in the template can be found.

A Progress dialog box appears briefly onscreen during the process. If the verification is successful, the project opens and the Contents pane displays the source documents, output pages, and templates for the root publication. (If you are importing a template, the template will now display in the Manage Templates dialog box.)

If a problem is encountered, one of two dialog boxes will appear, depending on the nature of the problem.

- The Project Path Replacement dialog box appears if Site Builder cannot find a file or directory specified in the project file or template.
- The Project Path Conflict dialog box appears if it encounters duplicate paths for a given file or directory.

Path Verification Complete

When you see the Project Paths Verification dialog box onscreen, Site Builder has completed "path verification." This means it has completed one of two processes:

- the path verification process it runs each time you open a project file or import a template
- the path fixup process according to your instructions in the Project Path Conflict dialog box or the Project Path Replacement dialog box

You should carefully check the summary of paths for files and directories in the list box to be sure that you are not missing any files that are part of the project file or are referenced in the template.

If you have completed path fixup to replace missing files or resolve path conflicts, you can still cancel these changes by clicking **Cancel**. In that case, Site Builder will return the project file or template file to its original state. Otherwise, click **OK** to open your project or import the template file.



Tech Tip: You may want to copy all or a portion of the summary to the Clipboard so that it can be inspected in another program, such as Notepad, and saved, if necessary. Highlight the entries to copy and press Ctrl+C, or right-click the selected text and choose Copy from the popup menu. Then open Notepad and press Ctrl+V.

Replacing a File or Directory

When you open an existing project, Site Builder runs a "path verification" to verify all paths in the project file for source documents, associated files, output directories, and any graphics used to create your Web pages. It also does this when you import a template, to be sure that all the graphics specified in the template can be found.

The Project Path Replacement dialog box appears if Site Builder cannot find a file or directory specified in the project file or template file.

 In the second text box in the dialog box, enter the correct path for the file or directory. You can type the new path and name or use the Browse button to locate the file or directory. You can use an output directory that does not currently exist. (A directory will be created at translation, but only if it is possible to actually create the specified directory.)

2. Click **Yes** to accept the new path if this is the only file or directory that needs to be replaced. Click **Yes to All** if you know there are additional files in the old directory that also should be referenced by the new path.

After you have verified the paths for the files and directories, the Project File Paths Verification dialog box appears, which summarizes your changes. You can click **OK** to begin work on your project. If you click **Cancel**, none of the changes will be implemented. You can still work on your project, but it will be missing the files that couldn't be verified.

If you click **No** in the Project Path Replacement dialog box, you will reject any proposed new path in the text box and the original path will be retained. If you click **Cancel**, you will cancel all paths already fixed up plus any automatic fixups already performed.

Chapter

5

BUILDING A PUBLICATION

This section covers the following topics:

- Publications (page 5-1)
- Choosing a Repository (page 5-8)
- Source Documents (page 5-30)
- Reference Pages (page 5-52)
- Templates (page 5-55)
- ✤ Layout Options (page 5-55)
- Directory Items (page 5-88)
- ✤ Associating a File With a Publication (page 5-99)
- Output Files and Directories (page 5-100)
- Integrating Third-Party Applications (page 5-109)

PUBLICATIONS

This section covers the following topics:

- About Publications (page 5-2)
- Adding a Linked Publication to a Project (page 5-2)
- Adding a Publication (page 5-3)
- Exporting a Publication (page 5-4)

- Importing a Publication (page 5-5)
- Updating a Web Publication (page 5-6)
- Publication Properties (page 5-6)
- Publication Hierarchy (page 5-8)

About Publications

There are two types of publications in Site Builder:

- the publication you use as a container to organize source documents for translation
- the Web publication you create when you translate the publication and turn those source documents into Web pages to view in your Web browser.

There are two types of Web page: body and reference. Body page is another name for a translated source document. Reference page is an optional page that Site Builder builds during translation to create a table of contents, index, query, list of figures, or list of tables (you can create all five).

Adding a Linked Publication to a Project

Just as you can add a Directory Item as a subpublication to a project, so, too, you can add another project. When you add one project as a subpublication to a second project, the first project becomes a linked publication (or subproject) and the second project becomes the master project. Each time you run a translation of the master project, the contents of the linked publication are translated, too.

However, to change a linked publication, you must open the linked publication by itself in Site Builder. And the next time you open the master project, you must be sure to use Update Versions before translating so that the changes made to the linked publication are reflected in the translation of the master project. See Updating a Linked Publication (page 8-10).

Linked publications can be especially useful in large projects where a heavy workload and complex publication hierarchy demand multiple project authors (and multiple content authors). The lead project author can be responsible for the master project, with other project authors handling portions (linked publications) of the master project.

Follow these steps to add a linked publication:

1. With your project open in Site Builder, select the subpublication in the publication hierarchy that will contain the linked publication.

- 2. Click **Publication** on the Add menu to open the Add Publication dialog box.
- 3. Click the **Linked Publication** button, and in the Open dialog box locate the project file for the project you want to add as a linked publication.
- 4. Select the project file and click **OK** to return to the Add Publication dialog box.

The publication name of the project is used for the name and title of the new subpublication you have just created for the linked publication. It is also used for the subfolder of output directories. You can change this, if you want.

5. Click OK.

You have now added a linked publication, which appears as a subpublication of the publication originally selected. Both the linked publication (in the Publication Hierarchy pane) and its contents (as displayed in the Contents pane) are grayed out to signify that you cannot edit a linked publication while it is part of a master project. You can convert a linked publication into a regular publication at any time.

Follow these steps to convert a linked publication into a regular publication:

- 1. Right-click the linked publication in the Publication Hierarchy pane.
- 2. Choose Make embedded from the popup menu.
- 3. Click **Yes** in the dialog box that appears.

The publication is now a permanent part of the master project and its contents can be edited like those of any other subpublication. (The project file for the linked publication still exists in its original location and can be used for other purposes, if you want.)

Adding a Publication

You can add a publication to any other publication in the publication hierarchy. Any publication you add becomes a subpublication of the other publication and can be used to organize a source document for translation.

- 1. In the Publication pane, select the root publication or one of the other publications you want to add this publication to.
- 2. Do one of the following:
 - Right-click to open a popup menu and choose Add Publication.
 - Click the Add Publication button () on the toolbar or large toolbar.
 - Choose **Publication** from the Add menu.

When you add a publication to the publication hierarchy, you name the publication. You can also give it a title that will display at the beginning of the Web page you create. And you can designate output directories for the output pages and for the graphics you convert during translation.

These options are all properties of the publication. They can be changed at any time by right-clicking the publication name in the Publication Hierarchy pane and choosing Properties from the popup men to open the Publication Properties dialog box.

You can also add a linked publication (see Adding a Linked Publication to a Project on page 5-2) to a project, that is, link a second project to an existing one by creating a special subpublication.

Exporting a Publication

To export and import publications in Site Builder, you use the appropriate commands from the File menu. When you export you simply create a project file for the publication. You then use that project file to import the publication into another project.

- 1. Open the project containing the publication you want to export.
- 2. In the Publication Hierarchy pane, select the publication you want to export. Whatever publication you select, you export that publication plus all it contains.
- 3. Click Export Publication on the File menu to open the Save As dialog box.
- 4. By default, Site Builder creates a project file name, using the name of the publication you're exporting. It's probably best to keep the same name when you export and import publications in this fashion.
- 5. Use the Save In drop-down box to locate the directory you want to save the new project to.
- 6. Click Save to return to the main window.

The new project file you have just created contains information about source documents, reference pages, formatting in templates, and even other subpublications (if any) and their contents.

Another way to

publications between two different projects is to have two instances of Site Builder open at the same time and to use the Cut and Paste commands.

Importing a Publication

To export and import publications in Site Builder, you use the appropriate commands from the File menu. When you export you simply create a project file for the publication. You then use that project file to import that publication into another project.

Once you've imported the publication, the project file still exists on whatever directory you saved it to, but it's no longer relevant to the new project, since the imported publication is now part of another project file.



Tech Tip: If you are creating a new project from a publication you exported from another publication, start Site Builder and choose **Open** from the File menu to locate the project file you created when you exported the publication.

- 1. In the Publication Hierarchy pane, select the publication you want to add the imported publication to.
- 2. Choose **Import Publication** from the File menu. In the Open dialog box, use the Look In drop-down box to locate the project file for the publication to be imported.
- 3. Select the project file and click **Open**.

At this stage, the Project Paths Verification dialog box will appear, because the paths of files in the project file you're importing have not yet been verified by Site Builder for the project file of the existing publication. If you need assistance, click the Help buttons in the dialog boxes that appear for path verification.

4. The Change Template Name dialog box may also appear, if the project file you're importing contains a template with the same name as one in the existing publication. If the templates have different settings, change the name of the template being imported, and click **Yes**. (If they're the same, you can overwrite the existing template.)

Site Builder lets you to give the template you're importing a new name so that you won't overwrite the same template in the existing publication. If you want to associate the source documents in the imported publication with the template in the existing publication, you can simply import the publication with its renamed template, and then re-associate its source documents with the template in the existing publication later.

Another way to move publications between two different projects is to have two instances of Site Builder open at the same time and to use the Cut and Paste commands.

Updating a Web Publication

When you update a Web publication, you change content, formatting, or both.

- You change content by editing the source documents.
- You change formatting by making the appropriate changes to the templates used in the publication and saving those changes to the project file.

If you add new styles or create new patterns in your source document, you'll need to either re-import the styles from the source document before retranslating it, or create new styles and elements in the template, using the same names as the new styles in the source document. (See Importing New Styles From a Source Document on page 6-47.)

It is best to make content changes in your source document in most instances. Because once you create a Web page with the original source document and its associated template, updating that page is simple.

Publication Properties

The properties of a publication consist of its name, its title, the output directory used to store the output pages generated during translation of its source documents and also each graphic converted during translation, and any text you choose to include in the Map file.

You can use different output directories for each body page and the graphics files created when Site Builder converts the graphics in the source documents. (A publication's output directories are applied by default to all of its source documents and thus become properties of those documents, too.) In the case of a root publication, you can also create an output directory specifically for Gallery Graphics.

Follow these steps to change a publication's properties:

- In the Publication Hierarchy pane, right-click the publication and choose Properties from the popup menu to open the Publication Properties dialog box (or choose Properties from the Publication menu).
- 2. To change the publication name, type the new name over the existing one.
- 3. Type a new title, if necessary, to replace the default one (by default, Site Builder uses the publication name for the title).
- 4. In the **Map file property** text box, enter any information you want to appear in the publication element in the XML Map file that Site Builder will generate when it translates the project.

- 5. In the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this publication. See Adding a Prefix to Output File Names (page 8-79) for more information.
- 6. Click **Generate JavaScript navigation file** to generate TOC.js, a JavaScript file that will be created in the Pages output directory.

TOC.js can be used to build your own navigation scheme. It summarizes the output Web pages for the project by output name and title (the latter as created in document properties for each source document or reference page). TOC.js for the root publication includes entry points for all subpublications, consisting of the first reference page or document in each subpublication. To generate greater detail, you can create a TOC.js file for each subpublication in the project by selecting this option in the Publication Properties dialog box for each subpublication.

- 7. To change the output directories, type over the path given or click **Browse** to locate the directory you want to use.
- To specify an output directory for Gallery Graphics, click Use gallery graphics directory and enter the path and name of the directory you want to use, or click Browse to locate the directory. (This option is available only for the root publication.) Click OK.

Tech Tip: If you temporarily don't want to use the specified directory, clear the check box. The directory path and name will be retained. You can simply select the check box any time you want to use the directory again.

- 9. Select **Publication TOC will appear in parent publication** if you would like the TOC of this publication to be treated as a normal page in the parent publication. This option can be useful for navigation. It is not available for the root publication.
- 10. Click **OK** to return to the main window.

The **Translate** and **Translate All** commands always place your output files on the file system, in the output directories specified in the Publication Properties dialog box. The **Publish** command makes copies of all output pages and graphics files from your last translation and places these in the locations specified in the Publish Options dialog box. The locations can be on your file system or in a repository.

See the Titles tab dialog in **Globals** for more information on how the title entered in Publication Properties can be used.

Publication Hierarchy

A publication hierarchy consists of the root publication and any subpublication(s), which display in the Publication Hierarchy pane.

The publication hierarchy is similar to a directory structure, in that you have a root publication instead of a root directory, and publications instead of folders. And just as a folder can contain other folders and files, so a publication can contain other publications and documents.

The order of publications in the publication hierarchy is important, as is the order of documents in each publication. Site Builder translates and links documents in the order in which they are listed in publications, and so uses this order to:

- Display body pages once you link them
- Summarize the contents of the body pages in the table of contents
- Determine which style attributes take precedence if you import two styles with the same name but different attributes from different source files

CHOOSING A REPOSITORY

This section covers the following topics:

- Selecting a Repository (page 5-8)
- Showing the Select a Repository Dialog Box (page 5-9)
- ♦ Adding Content From an FTP Server (page 5-10)
- Adding Content From an HTTP Server (page 5-13)
- Adding Content From Content Server (page 5-16)

Selecting a Repository

You can add documents from different sources: the file system, an FTP site, an HTTP site, or Content Server.

The Select a Repository dialog box opens by default the first time you add a source document (see Adding a Document on page 5-31) or a Directory Item (see Adding a Directory Item on page 5-89) to a project. Once you select a repository from the drop-down list, you can hide this dialog box from view as you work in Site Builder. If you later want to add source documents or Directory Items from another source, you need to show

the Select a Repository dialog box again (see Showing the Select a Repository Dialog Box on page 5-9).

You can create a project by adding documents and directory items from different repositories. To do this, you would want the Select a Repository dialog box to open each time.

Showing the Select a Repository Dialog Box

In Site Builder you can work in your file system or in Content Server. You can also add documents to a publication from an FTP or HTTP site.

You make your selection in the Select a Repository dialog box, which opens by default the first time you add a source document (see Adding a Document on page 5-31) or a Directory Item (see Adding a Directory Item on page 5-89) to a project. Once you select a repository from the drop-down list, you can hide this dialog box from view as you work in Site Builder.

If you later want to add source documents or Directory Items from another source, you need to show the Select a Repository dialog box again.

- 1. Click Application Options on the View menu to open that dialog box.
- 2. Click **Dialogs** to open that tab dialog.
- 3. Select the check box Show Select a Repository dialog box when adding a source document or directory item to a publication.
- 4. Click OK.

The Select a Repository dialog box will open the next time you choose the Add Document or Add Directory Item command. You can show or hide the dialog box at any time by selecting or clearing this option.

This setting is user-specific on a given machine. It applies to all projects run on the machine by the user logged in at the time of the change.

You can create a project by adding documents and directory items from different sources. To do this, you would want the Select a Repository dialog box to open each time.

Adding Content From an FTP Server

This section covers the following topics:

- Adding a Directory Item From an FTP Site (page 5-10)
- Adding a Document From an FTP Site (page 5-11)
- Updating Source Documents From an FTP or HTTP Site (page 5-12)
- Adding Multiple Language Documents From an FTP Server (page 5-13)

Adding a Directory Item From an FTP Site

You can select a Directory Item from different repositories, including an FTP site. See Adding a Directory Item From the File System (page 5-89) for information on selecting a repository and choosing a template. Once the FTP Source Directory dialog box opens, do the following:

1. Under Destination, enter the FTP server name. Neither the protocol (ftp://) nor a closing forward slash is required.

Example ftp.oracle.com.

- 2. Under Login Credentials, click **Use Anonymous FTP** if you are accessing an FTP site as an anonymous user. If you require an FTP user account, click **Use specific credentials** and enter both your user account and password.
- 3. Click **Use specific server TCP/IP port** if the server at the FTP site you are connecting to does not use the standard FTP port. Then enter the port number in the box.
- 4. Click **Browse** to open the Browse for Directory dialog box. Locate the directory you want to add to the project and click **OK** to return to the FTP Source Directory dialog box. The Path To Source Documents text box displays the path and name of the selected directory.
- 5. In the **Wildcard specification** text box, accept the default *.* if you want to include all files in the directory to your project. (Site Builder will translate only supportable file formats). Alternatively, specify the file formats you want to use, using semicolons to separate the entries.

```
Example *.doc;*.123;*.wpd
```

6. Click **OK** to leave the FTP Source Directory dialog box and return to the New Directory Item Properties dialog box. Once you have completed the other required information in this dialog box, click **OK** to return to the main window.

You can add a Directory Item from any FTP site that you can connect to. But when using "Anonymous" you may find that you are restricted to certain levels of files (which may also be the case with an FTP user account).

If you are connecting to the FTP site through a proxy server, click **Proxy** in the FTP Source Directory dialog box to open the Proxy Settings dialog box (see Proxy Settings for an HTTP Site on page 8-65).

You can also add a Dynamic Directory Item from an FTP site. See Adding a Dynamic Directory Item From the File System or an FTP Site (page 5-93) for more information.

Adding a Document From an FTP Site

You can select source documents from different repositories, including an FTP site. See Adding a Document From the File System (page 5-31) for information on selecting a repository and choosing a template. Once the FTP Source Document dialog box opens, do the following:

1. Under Destination, enter the FTP server name. Neither the protocol (ftp://) nor a closing forward slash is required.

Example: ftp.oracle.com

- 2. Under Login Credentials, click **Use Anonymous FTP** if you are connecting to an FTP site as an anonymous user. If you require an FTP user account, click **Use specific credentials** and enter both your user account and password.
- 3. Click **Use specific server TCP/IP port** if the server at the FTP site you are connecting to does not use the standard FTP port. Then enter the port number in the box.
- 4. Click Browse to open the Browse for File dialog box. Locate the document you want to add to the project and click OK to return to the FTP Source Document dialog box. The Source Document Path text box displays the path and name of the document you have just added.

You can add only one document at a time from an FTP site.

5. Click **OK** to leave the FTP Source Document dialog box. The Choose Template dialog box will open so that you can associate a template with the source document.

You can add documents from any FTP site that you can connect to. But when using "Anonymous" you may find that you are restricted to certain levels of files (which may also be the case with an FTP user account).

If you are connecting to the FTP site through a proxy server, click **Proxy** to open the Proxy Settings dialog box (see Proxy Settings for an FTP Site on page 8-61).

The source documents you translate must have file extensions; otherwise, you will not be able to publish successfully.

Updating Source Documents From an FTP or HTTP Site

When you start a new project and add source documents from an FTP or HTTP site, Site Builder makes copies of those documents, places them in a temporary directory on the file system, and translates the copies. Site Builder will continue to use those copies for translation during your current session in Site Builder unless you formally update the source documents.

Note: Site Builder copies a source document the first time it is "requested." This could be when you associate a template with the source document in the Choose Template dialog box (with the preview functionality turned on), when you preview the document in the Edit Template dialog box, or when you first translate the document. Also, Site Builder will delete the temporary file each time you close the project and create a new one the next time you start the project and the document is first requested.

So if there is a delay between the first time you translate and the last time you translate before publishing, you should update the copies of the source documents in the temporary directory.

To update source documents from an FTP or HTTP site, click **Update Versions** (

Copies of the latest versions of the source documents on the FTP or HTTP site have been placed in a temporary directory on your file system. You can now translate one last time and then publish. (See Update Versions Command on page 8-9.)

Because Site Builder copies source documents only when they are "requested," the Status column in the main window may be misleading. You may see a green check mark even though a more recent version of a document is available from an FTP or HTTP site. So always click Update Versions (see Update Versions Command on page 8-9) before your final translation. If a green check mark opposite a document turns to a red cross, you'll know that Site Builder has just copied an updated version of that document into the temporary directory, ready for translation.

Adding Multiple Language Documents From an FTP Server

Content Publisher accepts documents of all languages from an FTP server as long as the FTP server can properly read and process the file names and the paths of the source documents. If you add a source document to a publication from an FTP server that does not recognize the language used in the document's file name or path, you will receive a "Preview Fail" error, and the process will close.

To resolve the problem, change the filename (and if necessary the path to the file) to a language that the FTP server will recognize. Alternatively, move the source documents to an FTP server that matches the language used in the source documents.

Adding Content From an HTTP Server

This section covers the following topics:

- Adding a Directory Item From an HTTP Site (page 5-13)
- ✤ Adding a Document From an HTTP Site (page 5-14)
- Updating Source Documents From an FTP or HTTP Site (page 5-15)

Adding a Directory Item From an HTTP Site

You can select a Directory Item from different repositories, including an HTTP site. See Adding a Directory Item From the File System (page 5-89) for information on selecting a repository and choosing a template.

You can only add a directory from an HTTP site if the server for that site provides virtual directory listings.

After the HTTP Source Directory dialog box opens, do the following to add a Directory Item from an HTTP site:

1. Under Destination, enter the HTTP server name. Neither the protocol (http://) nor a closing forward slash is required.

Example www.oracle.com.

2. Under Login Credentials, click **Use anonymous connection** if you are connecting to an HTTP site as an anonymous user. If you require an HTTP user account, click **Use specific credentials** and enter both your user account and password.

- 3. Click **Use specific server TCP/IP port** if the server at the HTTP site you are connecting to does not use the standard HTTP port. Then enter the port number in the box.
- 4. In the Path to Source Documents text box, enter the path and name of the directory you want to add to your project.

To specify the directory you want to add to your project, you can open the HTTP site in your browser and select the directory from the directory listing. Then copy the URL from the Address or Location bar and paste it into the Path to Source Documents text box.

5. In the **Wildcard specification** text box, accept the default *.* if you want to include all files in the directory to your project. Site Builder will translate only supportable file formats). Alternatively, specify the file formats you want to use, using semicolons to separate the entries.

Example *.doc;*.123;*.wpd

6. Click **OK** to leave the HTTP Source Directory dialog box and return to the New Directory Item Properties dialog box. Once you have completed the other required information in this dialog box, click **OK** to return to the main window.

You can add a Directory Item from any HTTP site that you can connect to. But when using "Anonymous" you may find that you are restricted to certain levels of files (which may also be the case with an HTTP user account).

If you are connecting to the HTTP site through a proxy server, click **Proxy** in the HTTP Source Directory dialog box to open the Proxy Settings dialog box (see Proxy Settings for an HTTP Site on page 8-65).

The source documents you translate must have file extensions; otherwise, you will not be able to publish successfully.

Adding a Document From an HTTP Site

You can select source documents from different repositories, including an HTTP site. See Adding a Document From the File System (page 5-31) for information on selecting a repository and choosing a template. Once the HTTP Source Document dialog box opens, do the following:

1. Under Destination, enter the HTTP server name. Neither the protocol (http://) nor a closing forward slash is required.

Example www.oracle.com.

- 2. Under Login Credentials, click **Use anonymous connection** if you are connecting to an HTTP site as an anonymous user. If you require an HTTP user account, click **Use specific credentials** and enter both your user account and password.
- 3. Click **Use specific server TCP/IP port** if the server at the HTTP site you are connecting to does not use the standard HTTP port. Then enter the port number in the box.
- 4. In the Source Document Path text box, enter the path and name of the document you want to add to your project.

You can add only one document at a time from an HTTP site.

5. Click **OK** to leave the HTTP Source Document dialog box. The Choose Template dialog box will open so that you can associate a template with the source document.

You can add documents from any HTTP site that you can connect to. But when using "Anonymous" you may find that you are restricted to certain levels of files (which may also be the case with an HTTP user account).

If you are connecting to the HTTP site through a proxy server, click **Proxy** to open the Proxy Settings dialog box (see Proxy Settings for an HTTP Site on page 8-65).

To specify the document you want to add to your project, you can open the HTTP site in your browser and navigate to the document. Then copy the URL from the Address or Location bar and paste it into the Source Document Path text box.

The source documents you translate must have file extensions; otherwise, you will not be able to publish successfully.

Updating Source Documents From an FTP or HTTP Site

When you start a new project and add source documents from an FTP or HTTP site, Site Builder makes copies of those documents, places them in a temporary directory on the file system, and translates the copies. Site Builder will continue to use those copies for translation during your current session in Site Builder unless you formally update the source documents.

So if there is a delay between the first time you translate and the last time you translate before publishing, you should update the copies of the source documents in the temporary directory.

To update source documents from an FTP or HTTP site click **Update Versions** (

Copies of the latest versions of the source documents on the FTP or HTTP site have been placed in a temporary directory on your file system. You can now translate one last time and then publish. (See Update Versions Command on page 8-9.)

Actually, Site Builder copies a source document the first time it is "requested." This could be when you associate a template with the source document in the Choose Template dialog box (with the preview functionality turned on), when you preview the document in the Edit Template dialog box, or when you first translate the document. Also, Site Builder will delete the temporary file each time you close the project and create a new one the next time you start the project and the document is first requested.

Because Site Builder copies source documents only when they are "requested," the Status column in the main window may be misleading. You may see a green check mark even though a more recent version of a document is available from an FTP or HTTP site. So always click Update Versions (see Update Versions Command on page 8-9) before your final translation. If a green check mark opposite a document turns to a red cross, you'll know that Site Builder has just copied an updated version of that document into the temporary directory, ready for translation.

Adding Content From Content Server

This section covers the following topics:

- Adding a Document From Content Server (page 5-17)
- Adding a Directory Item from Content Server (page 5-18)
- Creating a Project File in Content Server (page 5-20)
- Connecting to Content Server (page 5-21)
- Illegal Characters in a Title (page 5-22)
- Obtaining Source Documents From Content Server (page 5-22)
- Opening a Project File From Content Server (page 5-23)
- Registering a Content Server (page 5-24)
- Registering a Content Server by Manually Creating a Registry Entry (page 5-24)
- Registering a Content Server by Running the Mini-Installer (page 5-25)
- Specifying a Directory for Temporary Files (page 5-26)
- Updating to the Latest Released Version of a Source Document (page 5-27)
- Specifying a Particular Version of a Source Document (page 5-27)

- Version Options When Translating a Source Document (page 5-28)
- Specifying a Directory Item to Facilitate Previews (page 5-28)
- Creating a Restricted Directory Item in Content Server (page 5-29)
- Criteria of a Directory Item in Content Server (page 5-30)

Adding a Document From Content Server

To add documents from Content Server to a project in Site Builder, you must first ensure that Site Builder is connected to Content Server so that you can select the appropriate repository option.

- 1. Click Add Document (📄) on the toolbar.
- 2. If the Select a Repository dialog box opens, select **Content Server** from the dropdown list. If this is to be the sole source of those documents, click **Don't show this dialog box again**. Then click **OK**.
- 3. In the Select a Document dialog box, conduct a search for the documents you want to add to your project. Once the search results display, select the documents.
- 4. If you want to choose a version other than the native file format, select Alternate or Web from the Content Rendition drop-down list at the top of the dialog box. Alternate is the alternative format you may have used when you checked the documents into Content Server. Web is the browser-ready version of the document. In most cases, this will be the PDF format.
- 5. Click the **Add Selected to Project** button (or click the **Add All to Project** button to add all the documents listed from the search.)

The Select a Document dialog box closes and the Choose Template dialog box opens.

6. In the Choose Template dialog box, associate a template with the source documents and click **OK** to return to the main window. The documents selected from Content Server are now listed in the Contents pane, with their associated template displayed in the Template column.

If Site Builder is not yet set up to access documents in Content Server, see Configuring Content Publisher (page 2-5).

If you have access to multiple content servers, the Choose a Content Server dialog box will open once you select Content Server as the repository and click OK (step 2). You can then select a content server from the drop-down list and click OK. The Choose a Content Server dialog box will still open even if you choose to hide the Select a Repository dialog box.

Only those content servers registered on your machine are available from the Choose a Content Server dialog box (see Registering a Content Server on page 5-24).

See Obtaining Source Documents From Content Server (page 5-22) for more information on adding source documents to Site Builder.

You must associate a single template with multiple source documents when you first add them to a project. But you can later associate a different template with those documents or even a different template with each one.

The default setting in the Choose Template dialog box is None. To import styles or patterns from a source document, you must formally select Styles or Patterns (see Ranks, Styles, and Patterns on page 6-28).

Adding a Directory Item from Content Server

In Content Server, a Directory Item is defined by a query. Any source documents that meet the search criteria for the query are considered part of the Directory Item. You should use the Update Versions command to ensure that any source documents later added to Content Server that meet the search criteria are included in future translations.

- In the Publication Hierarchy pane, select the publication you want to add the Directory Item to, and click **Directory Item** on the Add menu to open the New Directory Item Properties dialog box. (If necessary, select **Content Server** from the drop-down list and click **OK**.)
- Click Browse opposite the Directory field to open the Directory Item Properties dialog box. Then click the Content Server button to open the Choose a Content Server dialog box, and select a content server from the drop-down list. (If only one content server is configured on your machine, it will be selected already.) Click OK to return to the New Directory Item Properties dialog box.
- 3. Under Directory Item Information, provide a name for the Directory Item. (This name will be added to the content server name and will display in the Contents pane. By naming Directory Items, you will be able to differentiate between multiple Directory Items that are added to the same publication of your project and drawn from the same content server.)
- 4. Select **Restricted** from the Type drop-down list (since it's the default setting, it should be selected already).
- 5. In the **Maximum document count** box, enter the maximum number of source documents you want to include in the Directory Item in Content Publisher.

If you leave this blank, the number of documents returned will equal the number of documents returned as a result of the query in Content Server, up to the query result limit imposed by Content Server. The default limit in Content Server is 200.

For example, if you set up a query in Content Server using the default of 200 and set the Maximum document count in Site Builder to 40, you will only receive 40 files or fewer, depending upon the query results. If, instead, you set the document count in Site Builder to 250, you will only receive 200 files or fewer depending upon the query results, because that is the limit set in the content server.

The Sort selections you make influence your results. See Sorting Directory Items (page 5-94) for more information.

- 6. From the Content Rendition drop-down list, select Alternate or Web if you prefer to add source documents to your project in other than their native format. Alternate is the alternative format, if any, that you provided the source document in when you added it to the content server. Web is the browser-ready version of your native file. Since this will be PDF in most cases, the Web option can be particularly useful for adding PDF files to your project.
- 7. Click the Query button to open the Specify a Search dialog box in Content Server. Set your search parameters and click the Search button. Review the list of current hits resulting from the query to be sure that your Directory Item will capture all the documents you want to capture and no additional ones. To refine the query, click the Back button and set new search parameters. If the list of documents is satisfactory, click the Add Query to Project button to return to the Directory Item Properties dialog box.

To create a folder hierarchy based on the metadata assigned to your content items, click **Hierarchy** (see Query Results Hierarchy on page 5-96).

- 8. Click **OK** to return to the New Directory Item Properties dialog box, where the Directory field will read \\<content server>\<query name>.
- 9. In the **Title** text box, enter a title for the Directory Item. (You don't have to enter one. If you do, it can be used to populate titles of your output pages.)
- 10. Under Map File Property, you can enter text to specify a custom item that will be added to the output Map file (MapFile.xml). This could enable you, for example, to place security information in the Map file.
- 11. In the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this Directory Item. If publishing to Content Server, ensure that the file name, including all prefixes, is no more than 30 characters. See Adding a Prefix to Output File Names (page 8-79) for more information.

12. Under Output Directories, specify directories for output pages and graphics. Click **Browse**, if necessary, to locate the directories you want to use.

You don't have to enter anything. By default, Site Builder uses the full path specified for the root publication and mirrors the publication hierarchy in the structure of the output directories it creates. So you may want to simply enter just the names for the output directories you want to use.

13. Under Template, click **Choose Template** to open the Choose template dialog box. Select the template you want to associate with the source documents in the Directory Item, and click **OK**. Click **OK** again, to return to the main window.

When you created a restricted Directory Item, you must select Restricted before you create the query.

To edit the query for a Directory Item at any time, click the Info button on the Directory Item Properties dialog box to open the Details dialog box, and then click Modify. See Criteria of a Directory Item in Content Server (page 5-30) for more information.

On the Options tab dialog, you can set conversion options for passing through documents (see Passing Through Source Documents Without Conversion on page 5-38) and changing the output file extension (see Setting Check-In File Extensions on page 8-82) during check-in to the content server.

Creating a Project File in Content Server

Creating a project file in Content Server is similar to creating one when working in the file system, except that you save the project file to the content server and thus take advantage of the security, versioning, and other features of the content management system.

- 1. With a new project open in Site Builder, click **Save** (**I**) on the File menu.
- 2. In the Select a Repository dialog box, select **Content Server** from the Repository drop-down list. Click **OK**.

If you have not yet logged onto Content Server during your current session in Site Builder, the Enter Network Password dialog box will open so that you can log on. Complete the required information to gain access to the repository, and then click **OK**.

- 3. The Assign Project Info dialog box displays. Under Content ID, accept the ID that displays, or enter a unique Content ID without spaces. Note that any Content ID you enter is permanently assigned to the project file after you save the information.
- 4. Under Type, select the type from the choice list that best describes the project file. (You may want to create a special Type for project files to facilitate future searches for them.)

5. In the Title text box, enter a descriptive title for the project.

Do not provide the standard .tcp extension. Content Server will add it automatically. The extension won't be visible in Content Server, but you will see it, for example, in the title bar of Site Builder.

- 6. Complete the other fields, as necessary. For example, you may want to create a special security group for project files. See your Content Server documentation for more information.
- 7. Click **Assign Info** to save the information and return to the main window in Site Builder, where the project file name now displays in the title bar (with the .tcp extension).

Once you save a project file to Content Server, each time you click **Save** on the File menu or the standard toolbar, you will create a new version of the project file in the content server. See Versioning the Project File (page 4-9).

If you have access to multiple content servers, the Choose a Content Server dialog box will open once you select Content Server as the repository and click **OK** (step 2). You can then select a content server from the drop-down list and click **OK**. The Choose a Content Server dialog box will still open even if you choose to hide the Select a Repository dialog box.

Only those content servers registered on your machine are available from the Choose a Content Server dialog box. See Registering a Content Server (page 5-24) for more information.

Connecting to Content Server

For Content Publisher to run successfully with Content Server, you need to complete the following:

On each machine on which either Site Builder or Site Server is installed

Register the name of each content server and also the name of the HTTP server that is hosting each content server. See Registering a Content Server (page 5-24).

On each machine on which Site Server is running

Register a username and password in order to access each content server.
 See Registering a Username and Password for Site Server (page 8-27).

Illegal Characters in a Title

When you add a document to a publication, Site Builder uses the document title of the source document in Content Server as the file name in Site Builder. When you translate the publication, Site Builder creates an output file using the same name (adding the extension .htm). The name of the output file that is created during translation is used as the title when you publish and place the output files in the repository.

In Content Server you can create a document title that includes characters that are illegal on the file system. (For example, you can use commas and quotation marks.) Content Publisher handles illegal characters in the document title by replacing them with an underscore (_) when it creates a file name. The file system therefore accepts the output file name that is created during translation and Content Publisher successfully translates the file. As a result, when the output file is published back to the repository, its title is now slightly different to the source document title.

This modification of the source document title to create an output file name occurs only when the title contains illegal characters. The source document title itself is not modified.

Obtaining Source Documents From Content Server

To use Site Builder with Content Server, you must first select the appropriate repository option in the Select a Repository dialog box (see Selecting a Repository on page 5-8). Thereafter, if you choose to hide this dialog box, each time you use the Add Document command, the Select a Document dialog box will open and you can immediately begin to select documents from the content server.

If you have access to multiple content servers, the Choose a Content Server dialog box will open once you select Content Server as the repository. You can then select a content server from the drop-down list and click OK. The Choose a Content Server dialog box will still open even if you choose to hide the Select a Repository dialog box.

Only those content servers registered on your machine are available from the Choose a Content Server dialog box. See Registering a Content Server (page 5-24) for more information.

When you add source documents to a project, the default setting in the Choose Template dialog box is None. With this setting, Site Builder won't import styles or patterns from the source documents. Rather, it will create a set of default ranks that will be applied to the content of the source documents at translation. (See Ranks, Styles, and Patterns on page 6-28 for more information.) If you change this setting, the new setting will prevail until you change it again.

Site Builder doesn't actually check out source documents from the content server. Rather, it identifies the current version of each document during project setup and obtains a working copy of that version for translation. The Update Versions command should therefore be used before your final translation, assuming you want to use the latest versions of source documents in the repository. See Updating Source Documents in Content Server (page 8-70).

If the Update Versions command identifies a newer version of a source document, the Status column in the Contents pane will display an 8to denote this. In that event, you can use the Translate command to run an incremental translation to update your publication.

If you choose to use a specific version of a document in your publication, that document will not be subject to the Update Versions command, and only the specified version will be used for translations. See Version Options When Translating a Source Document (page 5-28).

Site Builder places working copies of source documents in the directory designated on your machine for temporary files. You can change this directory, if you want. See Specifying a Directory for Temporary Files (page 5-26).

Opening a Project File From Content Server

Once you check a new project file into Content Server, you can begin using it right away. And you can open the file at any time from the content server for future sessions in Site Builder.

- 1. Click **Open** (🔁) on the toolbar.
- 2. If the Select a Repository dialog box opens, select **Content Server** from the Repository drop-down list, and click **OK**. The Select a Project dialog box opens.
- 3. Create a search in order to locate the project file you want to open.
- 4. Once the review of hits appears, click the **Select** button for the project file you want to open.

Each time you create a project file, Site Builder creates a companion history file. See The History File (page 4-3) for more information.

If you have access to multiple content servers, the Choose a Content Server dialog box will open once you select Content Server as a repository and click OK (step 2). You can then select a content server from the drop-down list and click OK. The Choose a Content Server dialog box will still open even if you choose to hide the Select a Repository dialog box.

Only those content servers registered on your machine are available from the Choose a Content Server dialog box. See Registering a Content Server (page 5-24) for more information.

Registering a Content Server

For Content Publisher to work successfully with Content Server, both Site Builder and Site Server must have access to each content server in use. This is true whether the content server is a source of documents for your projects or serves as a location for the staged and published output that your projects generate.

During installation you can register a single content server by providing the name of the content server and also the name of the HTTP server that is hosting the content server. You may need to register additional content servers (say, for the staged and published output your projects generate). You can do this in one of two ways:

- Running the mini-installer provided on your Content Publisher product disc (see Registering a Content Server by Running the Mini-Installer on page 5-25), or
- Manually creating a Registry entry (see Registering a Content Server by Manually Creating a Registry Entry on page 5-24).

Running the mini-Installer simply automates the process of creating the required Registry entry.

Registering a Content Server by Manually Creating a Registry Entry

During the installation of Site Builder or Site Server, you can register a single content server by providing the name of the content server and also the name of the HTTP server that is hosting the content server. This is essential if the client or server is to have access to Content Server.

You may need to register additional content servers (say, for the staged and published output your projects generate). You can do so at any time by manually creating the required Registry entry.

- 1. From the Start menu, click **Run**.
- 2. In the Open text box, type regedit and click OK.
- 3. Locate the following Registry key:

HKEY_LOCAL_MACHINE\SOFTWARE\Stellent\Content Publisher\Repository\ 6.0\Stellent\CS List

- 4. Right-click CS List, and choose New and then Key from the popup menu.
- 5. In the edit box that appears, replace **New Key #1** with the name of the content server, say, **Dev**. Press **Enter**.
- 6. Right-click the new Key (say, **Dev**) and select **New** and then **String Value** from the popup menu.
- 7. Enter the String Name CgiURL and press Enter.
- 8. Right-click **CgiURL** and choose **Modify** from the popup menu. In the Value Data text box, enter the following if you are using Microsoft Explorer Information Server to host Content Server:

http://<HTTP server name>/intradoc-cgi/idc_cgi_isapi.dll

For example, if your HTTP server is named ContentServer, you would enter:

http://contentserver/intradoc-cgi/idc_cgi_isapi.dll

If, instead, you are using Netscape Enterprise Server to host Content Server, enter the following in the Value Data box:

http://<HTTP server name>/intradoc-cgi/nph-idc_cgi.exe

Example:

http://contentserver/intradoc-cgi/nph-idc_cgi.exe

9. Press Enter.

You have created the necessary Registry entry. You can begin using the client or server immediately to access the content server you have just registered.

You can edit this entry at any time, should you later change the name of your content server or HTTP server.

Follow the above steps to register the same content server on additional machines, as necessary, and also to register additional content servers on the same machine.

You can automate the process of registering a content server by using the mini-Installer available on the Content Server product disc. See Registering a Content Server by Running the Mini-Installer (page 5-25).

Registering a Content Server by Running the Mini-Installer

During the installation of Site Builder or Site Server, you can register a single content server by providing the name of the content server and also the name of the HTTP server

that is hosting the content server. This is essential if the client or server is to have access to Content Server.

You may need to register additional content servers (say, for the staged and published output your projects generate). You can do so at any time by running the mini-Installer that is available on your Content Publisher product disc.

Follow these steps to run the mini-Installer:

- 1. Insert your Content Publisher product disc in the product disc drive of the machine on which either Site Builder or Site Server is installed.
- 2. Open the Support folder and double-click **CSSetup.exe**.
- 3. Complete the information requested on each of the installer screens that appear, in turn.
- 4. Click Finish to complete the running of the mini-Installer.

You have created the necessary Registry entry. You can begin using the client or server immediately to access the content server you have just registered.

Follow the above steps to register the same content server on any additional machines, as necessary, and also to register additional content servers on the same machine.

The mini-Installer simply automates the process of creating the required Registry entry. To manually create the entry or to edit an existing entry, see Registering a Content Server by Manually Creating a Registry Entry (page 5-24).

Specifying a Directory for Temporary Files

When you add a source document from Content Server to a project, Site Builder identifies the latest released version at that time and makes a working copy of the source document at translation time. It places the working copy in your TEMP directory. Site Builder uses that working copy for all future translations (unless you use the Update Versions command to update the source documents).

If you prefer, you can place the working copies elsewhere on your file system. To do this, you need to create the following Registry Key:

 $HKEY_LOCAL_MACHINE \ Software \ Stellent \ Content\ Publisher \ Repository \ 6.0 \ Stellent \ Content\ Publisher \ Repository \ 6.0 \ Stellent \ Content\ Publisher \ Repository \ Reposi$

Create a string value with the String Name "Cache" and the Data Value being <the directory you want to use> (the full path of the directory).

Updating to the Latest Released Version of a Source Document

The default behavior in Content Server is for the latest released version of a source document to be used each time you translate. Thus, each time you enter the Document Details dialog box, the **Allow refresh to latest released version** check box is selected at the top of the dialog box.

You may have previously specified that a particular version be used and now want the latest released version to be used, instead.

- 1. In Site Builder, right-click the appropriate source document in the Contents pane and choose **Properties** from the popup menu.
- 2. In the Document Properties dialog box, click the **Info** button ([[]]) to open the Document Details dialog box.
- 3. At the top of the dialog box, select the **Allow refresh to latest released version** check box.
- 4. Click the **Select** button to close the Document Details dialog box.

Each time you use the Update Versions Command (page 8-9), Site Builder will now use the latest released version of this source document when you translate or publish in future.

Specifying a Particular Version of a Source Document

When you add documents that reside in Content Server, you do not check out those documents as you do in your normal use of Content Server. Rather, Site Builder identifies the current version of each document at the time it is added to the publication and obtains a working copy of that version for translation.

By default, Site Builder automatically uses the latest released version of all source documents. When you click Update Versions (see Update Versions Command on page 8-9) Site Builder checks the repository to identify the latest released version of each document and uses that version for translation.

You can, instead, use a particular version of a source document.

- 1. On the Contents pane, right-click the appropriate source document and choose Properties from the popup menu.
- 2. In the Document Properties dialog box, click the **Info** button ([1]) to open the Document Details dialog box.
- 3. At the top of the dialog box, clear the **Allow refresh to latest released version** check box.

- 4. Scroll down the list of versions available for the document and click the **Revision** button for the version you want to use.
- 5. Click the **Select** button to return to the main window.

Even if you use Update Versions to update the other source documents in your publication, Site Builder will ignore any later versions of this document and translate only the specified version.

Version Options When Translating a Source Document

When you add documents that reside in Content Server, you do not check out those documents as you do in your normal use of Content Server. Rather, Site Builder identifies the current version of each document at the time it is added to the publication and obtains a working copy of that version for translation.

As you create a publication, you may translate your source documents several times before you finally stage and publish a project. And you may stage and publish many times as you maintain and update the project over time.

You can control the version of each source document you translate, and therefore the content you stage and publish:

- 1. **The latest released version**—With the Update Versions Command (page 8-9), you update your publication to use the latest released version of each source document, unless you have specified that a particular version of a source document be used. See Updating to the Latest Released Version of a Source Document (page 5-27).
- 2. **The specified version**—When you specify a particular version of a source document, this version is always used when you translate, even if you use the Update Versions command. See Specifying a Particular Version of a Source Document (page 5-27).

Specifying a Directory Item to Facilitate Previews

Each Directory Item you create is, by default, of the "restricted" type. With this setting, and once a project is registered, a content author can preview at check-in any source document that is assigned document information that associates the document with a restricted Directory Item in the project.

- 1. Click **Directory Item** on the Add menu. If necessary, select Content Server as the repository and choose a specific content server.
- 2. In the New Directory Item Properties dialog box, click **Browse** to open the Directory Item Properties dialog box.

- 3. Click the **Content Server** button to open the Choose a Content server and choose a content server from the drop-down list.
- 4. Under Directory Item Information, provide a name for the Directory Item.

This name will be added to the content server name and will display in the Contents pane. By naming Directory Items, you will be able to differentiate between multiple Directory Items that are added to the same publication of your project and drawn from the same content server.

- 5. Select **Restricted** from the Type drop-down list (since it's the default setting, it should be selected already).
- 6. In the Maximum Document Count box, enter the number of source documents you want to include in the query.

The default setting is blank, which means that the query will include all source documents that meet the query criteria (up to the limit set within Content Server). But you can, if you like, limit the number of documents by entering a number in the box or using the arrows to the right of the box to set the number.

If you set a limit, the source documents used will be those listed first according to the Sort selection you made for the search in Content Server and whether you wanted the results listed in ascending or descending order.

- Create a query in Content Server (see Adding a Directory Item From Content Server on page 5-91). Once you click the Add Query to Project button, you'll return to the Directory Item Properties dialog box.
- 8. Click OK.

When you create a restricted Directory Item, you must select Restricted (step 5) before you create the query (step 7).

You cannot conduct a full text search to create a restricted query. (You can use only document information for the search, not document content.)

To change a standard query to a restricted query, you must re-specify the query.

Creating a Restricted Directory Item in Content Server

When adding a Directory Item from Content Server, (see Adding a Directory Item From Content Server on page 5-91), you have the option of making it restricted or standard.

The following options are available from the Type drop-down list under Directory Item Information in the Directory Items Properties dialog box:

- Restricted—to be used to facilitate previews when source documents that are part of the Directory Item are checked into Content Server (you can use only document information to create the query, not document content)
- Standard—to be used if you want to use a full-text search in Content Server to create the query

Restricted is the default setting. Be sure to accept the default setting if you want to be able to preview source documents checked into Content Server.

Criteria of a Directory Item in Content Server

A Directory Item in Content Server is created from a query. Once the Directory Item is created, you may forget the criteria you used to create the query. Or you may want to edit the query once it has been set up.

- 1. Right-click the Directory Item in the Contents pane and choose **Properties** from the popup menu.
- 2. In the Directory Item Properties dialog box, click the **Info** button (**[11]**) to open the Details dialog box. The Details dialog box provides a summary of the Directory Item, including the criteria used to create the query for the Directory Item.
- 3. To edit the query, click **Modify**, to return to the Directory Item Properties dialog box. You can edit any of the information in this dialog box. You can also click **Query** to edit the query itself.

SOURCE DOCUMENTS

This section covers the following topics:

- Adding a Document (page 5-31)
- Adding a Document From the File System (page 5-31)
- Document Properties (page 5-32)
- Moving Source Documents in the Contents Pane (page 5-34)
- Associating Alternative Text with a Graphic From Source (page 5-34)
- Creating Alternative Text From a Caption (page 5-35)
- PDF Input Files (page 5-36)
- XML Input Files (page 5-36)

- Updating Source Documents (page 5-36)
- About Pass-Through Conversion (page 5-37)
- Opening a Source Document (page 5-38)
- Passing Through Source Documents Without Conversion (page 5-38)
- Passing Through HTML or Scripting Code During Translation (page 5-39)
- Removing a Document or Reference Page From a Publication (page 5-40)
- Translating Source Documents (page 5-41)
- Translation Status of Source Documents (page 5-42)
- HTML Input Files (page 5-43)
- File Formats and Translation (page 5-44)
- Text Formats Supported (page 5-45)
- OLE Object Support (page 5-51)

Adding a Document

You can add source documents to a project from the following repositories:

- File system—See Adding a Document From the File System (page 5-31).
- FTP site—See Adding a Document From an FTP Site (page 5-11).
- HTTP site—See Adding a Document From an HTTP Site (page 5-14).
- Content Server—See Adding a Document From Content Server (page 5-17).

The source documents you translate must have file extensions; otherwise, you will not be able to publish successfully.

Adding a Document From the File System

Adding a document to a publication is a two-step process: you select a document for translation and then associate a template with the document. Site Builder lets you select documents from different sources, including the file system.

- 1. Do one of the following:
 - Right-click anywhere in the Contents pane and choose Add Document from the popup menu that appears.

- Click Add Document () on the toolbar or large toolbar.
- Choose **Document** from the Add menu.
- 2. When the Select a Repository dialog box opens, select **File System** from the dropdown list and click **OK**. (If you need to display this dialog box, see Showing the Select a Repository Dialog Box on page 5-9.)

The Add Document dialog box appears.

- 3. Use the Look In drop-down box to display the directory structure and locate the folder containing the document you want to add.
- 4. Open the folder, select the document, and then click **Open**. The Choose Template dialog box opens.

To associate a template with the document

- 1. In the Choose Template dialog box, select the template from the Templates list that you want to associate with the document.
- 2. Under Import Styles or Patterns, accept the default **None** or select **Styles** or **Patterns** instead. (See Ranks, Styles, and Patterns on page 6-28.)
- 3. Click OK.

You can select multiple source documents in a directory. They will all be associated with the same template when you import them.

You can import multiple source documents of different file formats by selecting All Supported Formats from the Files of Type drop-down box.

You can also add documents to a publication by dragging them directly from Windows Explorer and dropping them into the Contents pane.

The source documents you translate must have file extensions; otherwise, you will not be able to publish successfully.

Document Properties

The general properties of a source document consist of its output page name, the template associated with the document, the output directories for the body page itself and for the graphics files created when Site Builder converts graphics in the source document.

Document options include settings for specifying an output character set and ensuring that the document is passed through without conversion, if desired.

Changing a Document's General Properties

Follow these steps to change a document's general properties:

- 1. In the Contents pane, right-click the document and choose **Properties** from the popup menu to open the Document Properties dialog box.
- 2. To change the output page name, type the new name over the existing one, which is already selected.
- 3. In the **Map File Property** text box, enter any information you want to appear in the Document element in the XML Map file that Site Builder will generate when it translates the project.
- 4. To change the output directories, type over the paths given or click **Browse** to locate the directory you want to use. If no paths are listed in the two text boxes, Site Builder will use the paths set in the Publication Properties dialog box.
- 5. To change the template associated with the document, click **Choose Template** to open that dialog box, and select another template from the Templates list box.
- 6. If the document is from Content Server, you can click the **Info** button (**()**) to open the Content Information page for the document (and, for example, specify a different version of the source document that you want to use.)
- 7. Click **OK**, and **OK** again to return to the main window.

Changing a Document's Options

Follow these steps to change a document's options:

- 1. In the Contents pane, right-click the document and choose **Properties** from the popup menu to open the Document Properties dialog box.
- 2. Select the Options tab dialog.
- 3. If this document requires a different output character set than the one displayed under Output Character Set, select a set from the drop-down list. See Output Character Sets (page 5-108) for information on character sets and setting the project default set.
- 4. If you want the document to be passed through to the output folder in its original format, retaining the original file name and extension, select Pass this file through without conversion and specify an output file location. See About Pass-Through Conversion (page 5-37) for more information.

Moving Source Documents in the Contents Pane

The order of source documents in a publication is important because it determines how the individual Web pages in your publication are linked.

Once you complete publication setup, you can "drag and drop" any source document to change its order in the publication. In the Contents pane, select the document, hold down the mouse button as you reposition the document, and then release the mouse button once you have the document where you want it positioned.

Associating Alternative Text with a Graphic From Source

You have three options in Site Builder for associating alternative text with a graphic from a source document. Whatever text is used will display in your browser in the event that the graphic does not display. (The text will also be visible when the mouse is passed over the graphic on your Web page.)

- 1. In the Formatting property sheet, select the element associated with the graphic.
- 2. Click Graphics to open that tab dialog.
- 3. Do one of the following:
 - Under Alternative Text, click Use Alternative text from source document if available, or
 - Under Captions, click Use caption, and then click the Caption button, and in the Captions dialog box, click Before the graphic or After the graphic, and then click OK, or
 - Under Alternative Text, enter text in the Alternative Text field that you want to display in place of the graphic.
- 4. Click OK.

You must select the element associated with a graphic in order to associate alternative text with it. However, you can select multiple elements, if you like, to be sure that you edit all the appropriate elements of the template that are associated with graphics.

You can also select multiple methods of associating alternative text, that is, all three bulleted options in Step 3. In that event, Site Builder will follow the order of the bulleted list items to determine what alternative text to display.

In other words, if you associate alternative text with a graphic that is embedded in a source document, that text will always be used, and the other two types of alternative text, if selected, will be ignored for that graphic. If you don't specify alternative text from the source document, then caption text will be used, if it has been specified, and any alternative text entered in the Alternative Text field will be ignored. Finally, alternative text is specified.

One benefit of using alternative text specified in the source document is that you can have a unique piece of text associated with each graphic. This isn't generally possible when you enter text in the Alternative Text field, unless, of course, you have created a unique style (and therefore element) for each graphic.

"Caption text" refers to any text immediately before or after the graphic. For more information, see Creating Alternative Text From a Caption (page 5-35).

Creating Alternative Text From a Caption

Site Builder provides three options for associating alternative text with a graphic in a source document (see Associating Alternative Text with a Graphic From Source on page 5-34). One is to use "caption text."

"Caption text" is any text that appears immediately before or after a graphic in your source document. Either portion of text can be used as alternative text in your output Web pages. It will appear onscreen when the user passes the mouse over the graphic. It will also take the place of the graphic in the event that the graphic does not display on the Web page.

- 1. On the main window, select the appropriate template and click Formatting (
- Select the element associated with the graphic and click Graphics to open that tab dialog.
- 3. Under Captions, click **Use caption** and then click the **Caption** button to open the Captions dialog box.
- 4. Under Caption Source, click Before the graphic or After the graphic.
- 5. Click OK, and OK again to return to the main window.

The text immediately before or after each graphic associated with the selected template will now be used as alternative text in your Web output pages.

If you want to use the text of actual captions in this way, the captions must immediately follow the graphic (and not a figure number, for example).

If you want to use caption text for alternative text, do not select the **Use alternative text from source document if available** check box on the Graphics tab dialog. Otherwise, that text will be used instead.

PDF Input Files

In addition to creating HTML and XML output files, Site Builder can also handle these formats as input files. It can also incorporate PDF files into a Web publication by creating a page linked to the original file, which can be opened in its native format if the user has Adobe Reader installed.

The original files are passed through to the staging or publishing area. Site Builder creates a page as a placeholder for the PDF file at the appropriate point in the publication. This page is linked to other output pages, according to its order in the translation process. In addition, the page contains a link to the PDF file, using the name of the file as an identifier. When the user clicks that link, the PDF file opens in its native format in Adobe Reader, assuming that application is installed on the user's machine.

You can also pass through PDF files without conversion and promote the file to a publication's TOC, creating a direct link from the TOC to the PDF file. See About Pass-Through Conversion (page 5-37) for more information.

XML Input Files

In addition to creating HTML and XML output files, Site Builder can also handle these formats as input files. It can also incorporate PDF files into a Web publication by creating a page linked to the original file, which can be opened in its native format if the user has Adobe Reader installed.

XML files are passed through, completely unchanged, to your staging or publishing area. Their existence is noted in the TOC and other navigational links. They are also noted in the XML Map file. How your browser or other viewer renders the file may vary.

Updating Source Documents

Site Builder automatically recognizes when single source documents on the file system have changed and includes those files in any incremental translation you run.

However, you must use the Update Versions Command (page 8-9) in all other instances in order to update source documents before translation:

- Updating a Dynamic Directory Item (page 5-94)
- Updating Source Documents in Content Server (page 8-70)
- Updating Source Documents From an FTP or HTTP Site (page 5-12)

About Pass-Through Conversion

The files you use to create a Web publication may include those in special formats (such as AVI or PDF) that you want Site Builder to preserve. Site Builder can pass through such files and place them in the appropriate output directory so that they are recognized as part of the project. They can then be referenced from within the project and even promoted to a publication Table of Contents (TOC) (page G-24).

You can set the pass-through conversion option for Directory Item and documents.

Passing Through a Document

When you set the pass-through conversion option for a document, that source document is passed through to the output folder in its original format, using the original file name and extension. You can then reference the file in your project. You can also promote the document to the publication TOC, creating a direct link from the TOC to the file.

This can be useful if you want to link to a PDF file directly from the TOC so the user can open the PDF file from the TOC. (In this case, the user will have to have Acrobat Reader installed on his or her machine. Other files you pass through may require other applications to be available on the user's machine.)

Passing Through a Directory Item

When you set a pass-through option for a Directory Item, the documents matching the criteria you specify are passed through to the output folder during translation in their original format, using their original file names and extensions.

You can set conversion options for one file type, multiple file types, or all documents in that directory. You could use this feature to place all of the files you want to include in your publication without translation into one central location.

Opening a Source Document

You can open any source document in your publication at any time by launching the file in its native application from Site Builder.

In the Contents pane, select the source document you want to open and

- Right-click and choose Open Source Document from the popup menu that appears, or
- Choose Source Document from the View menu.

You can only view the source document if the appropriate application is available from your machine. Also, the source document must be on your file system or in Content Server (this option is not available for source documents on an FTP or HTTP site). In the case of Content Server, clicking Open Source Document will take you to the Content Information page for the document.

You can also open a source document from your Web page. See Adding a Link to Source Link to a Page Button Bar (page 6-145).

Passing Through Source Documents Without Conversion

You can set pass-through conversion options for documents and Directory Items to preserve their original format. See About Pass-Through Conversion (page 5-37) for more information.

- 1. In the Contents pane, right-click the document or Directory Item and choose **Properties** from the popup menu to open the Properties dialog box.
- 2. Select the Options tab dialog.
- 3. Under Conversion Options, do one of the following:
 - if a document, select Pass this file through without conversion.
 - if a Directory Item, select Pass through files matching the following specification. In the File specification criteria text box, enter the specifications for the types of files included in the Directory Item that you want to pass through without modification during translation, such as *.avi;*.pdf. Separate entries with a semicolon.
- 4. Select the output location for passed-through files.
- 5. Click OK.

To reference a passed-through document in the TOC, promote Title (System), which is the only element available for TOC promotion when using this option.

If you do not promote the title of a passed-through document to the TOC, the file is essentially the same as an associated file in Site Builder. See Associating a File With a Publication (page 5-99) for more information on associated files.

If you choose to treat the files in a Directory Item in a manner similar to associated files, add the Directory Item to a publication containing no TOC and no framesets, and select a "blank" template containing no promotion to reference pages.

You can also include a PDF file in a Web publication as a Web page that contains a link to the original file. See PDF Input Files (page 5-36) for details.

Passing Through HTML or Scripting Code During Translation

You can pass through HTML or scripting code during translation. One simple example might be the HTML code embedded in your source documents in the form of a link to another Web page from the one you are creating.

Another example might be Word bookmarks. By default, when Site Builder regenerates target names in output files, it does not retain bookmark names in Word source files. This ensures uniqueness, because Site Builder can add its own navigation to a Web publication (navigation buttons, TOC links, etc.). But you may want to preserve links to specific bookmarks in the Word source documents. (See Retaining Original Bookmark Names on page 6-163.)

Hard coding the bookmarks will preserve them during conversion. This procedure can also be used to pass through Idoc Script and other scripting code.

Follow these steps to map hidden code for a Word bookmark to HTML in published output:

1. With your source document open in Word, place your cursor immediately before the word you want to bookmark and type the HTML code for a bookmark:

 Select the HTML code, click Format > Styles, and create a character style. Give that style the hidden font. You might want to name that style "Bookmark." (If you passed through Idoc Script, you might name the character style "idocscript.") If you want to display the hidden text in your Word document, click **Tools > Options**, and from the **General** tab check the option to show Hidden text. The hidden text will display with a dotted line below it.

- In Site Builder, add the file to your project. (If it is already a part of your project, rightclick the file name or Directory Item in the Contents pane and choose Import > Styles. Alternatively, manually add and associate this new style with a new element by using the Add buttons in the Element Setup, Element and Style tabs.)
- 4. Open **Formatting**. On the **Character** tab, select the character element that is associated with the hidden text (say, "Bookmark"), and click the **Effects** button.
- 5. In the lower section, scroll down and select **Hidden** as the input effect. Then rightclick the output effect opposite, and select **HTML** from the popup menu.
- 6. Translate and view your results.

Instead of using hidden text, you can use text attributes such as bold, italic, underline, and subscript. But these attributes might already be in use in your source documents, so hidden text is likely to be the best choice.

Removing a Document or Reference Page From a Publication

You can remove a document or reference page from a publication at any time.

- 1. In the Contents pane, select the source document or reference page.
- 2. Click **Delete** (X) on the toolbar or choose **Delete** from the Edit menu.

When you delete a source document or reference page in this way, you simply remove the source document or reference page from the publication. The original source document is unchanged. The template associated with the document or reference page is still available in the publication.

If you delete a source document or reference page after you have translated a publication, you might also want to the delete the appropriate files from your output directory.

You can also use the Cut command from the Edit menu or toolbar. If you do, and change your mind, you can then use the Paste command to return the source document or reference page to the publication.

Translating Source Documents

Translation in Content Publisher is the process of creating Web pages from source documents. (For a list of source documents, see File Formats and Translation on page 5-44.) The individual template settings control the translation details and ultimately the appearance of the Web page—the source documents remain unchanged.

Site Builder offers three translation options: Selective Incremental Translation, Translate, and Translate All.

- Use Selective Incremental Translation for a translation of only the item or items you specify (except reference pages). You may want to use this option if, for example, you change a template that impacts many documents, but you only want to translate one of those documents.
- Use Translate for an incremental translation, where Site Builder recognizes the source documents in the file system that have changed since the last translation and translates only those.
- ✤ Use Translate All for a full translation.

To determine the translation status of source documents (see Translation Status of Source Documents on page 5-42), check the Status column in the Contents pane.

For a Selective Incremental Translation

Perform a selective incremental translation in one of these ways:

- Select and right click any publication from the Publication Hierarchy Pane and click Translate Publication from the drop-down menu that displays.
- Select and right click any item except a reference page from the Contents Pane and click Translate Selected from the drop-down menu that displays.
- Select any item(s) except a reference page from the Contents Pane and click
 Translate Selected from the Run menu. To select multiple items, hold down the CTL key while you click the items you want to translate.

For an Incremental Translation

Perform an incremental translation in one of three ways:

- On the standard toolbar or large toolbar, click Incremental Translation ().
- From the Run menu, choose Translate.

For a Full Translation

From the Run menu, choose **Translate All**.

You use temporary disk space each time you translate. This can vary significantly, depending on the number and size of the files and graphics you convert. A range of 20–50 free megabytes of free disk space is highly recommended. Check your log file, which will warn you if you have run out of disk space. (See Setting Up the Translation Log on Site Builder on page A-5.)

You can always force a translation by right-clicking the appropriate green check mark in the Status column and choosing the red cross from the popup menu that appears. A red cross now appears in the Status column and Site Builder will include the source document in the next incremental translation. You can also select the document and translate it using Selective Incremental Translation. The Translate All command may be appropriate for your final translation before publishing. In that event, you might also want to clean out the output directories just in case there are remnants, for example, of source files that are no longer part of the project.

The Status column won't flag out-of-date source documents from an FTP or HTTP site, or from Content Server. In those cases, you can use the **Update Versions** command before translating to ensure that you use the latest versions available.

Likewise, since a Directory Item can contain multiple documents added to the directory or updated at any time, the Status column won't flag the status of the directory's contents. However, Site Builder will include new and updated files in any incremental translation.

For more information on selective translation options, see Showing the Selective Incremental Translation Dialog Box (page 3-20).

The source documents you translate must have file extensions; otherwise, you will not be able to publish successfully.

Translation Status of Source Documents

The Status column in the Contents pane summarizes the translation status of each source document in the project.

- **ü** Source document is currently up-to-date and has not been revised since the last translation.
- **r** Source document is out-of-date and should be included in the next incremental translation.

- ! As Site Builder translates a publication, this mark may appear temporarily as each source document is translated. If the mark is still there at the end of a translation, an error has occurred. In that event, Site Builder has been unable to translate the source document and you should consult the log file for logging errors (see Logging Errors on page A-3).
- Signifies a Directory Item, which can contain new files added at any time. You need to use the Update Versions command before each translation to ensure that Site Builder updates all files.

When you first translate a publication, a green check mark appears opposite each source document. A green check mark will revert to a red cross for one of three reasons: the content of the source document has changed, the template has changed, or an output file is missing.

If source documents on an FTP or HTTP site have been updated, the Status column won't necessarily reflect this, but you can use the Update Versions command to update such documents before translating.

You can force a translation very easily. Simply right-click the appropriate green check mark in the Status column and choose the red cross from the popup menu that appears. A red cross now appears in the Status column and Site Builder will include the source document in the next incremental translation. You can also use Selective Incremental Translation (see Showing the Selective Incremental Translation Dialog Box on page 3-20.

The Status column for reference pages reflects the status of the template. All reference pages are updated, as necessary, whenever you do an incremental translation. Reference pages are not updated using Selective Incremental Translation.

The source documents you translate must have file extensions; otherwise, you will not be able to publish successfully.

HTML Input Files

In addition to creating HTML output files, Site Builder can also handle files in this format as input. When HTML files are added to a project as source documents, the HTML files remain intact, but you can make them consistent with other Web pages in the project by enhancing them with a common background, a title, and navigation buttons.

When you translate files that have linked graphics, such as HTML files, the graphics are copied to the output directory. If you have two HTML source documents that have links to

different graphics with the same name, the resulting graphics file names will be incremented to keep them from overwriting each other.

When Site Builder translates an HTML file, information in the <HEAD> of the file, including Meta tags, is passed through unchanged. The element Title is assigned to any titles in the Head.

File Formats and Translation

Site Builder translates source documents from major word processing, spreadsheet, and presentation software programs, as well as those in other common file formats. In addition, Site Builder accepts many different graphics formats. Site Builder can convert more than 225 different document and graphics formats.

See	For
Text Formats Supported (page 5-45)	A complete list of the major formats that Site Builder accepts for source documents
Graphics Formats Supported (page 6-170)	A complete list of the major formats that Site Builder accepts for graphics embedded in or linked to source documents
OLE Object Support (page 5-51)	A special note about embedded OLE objects in Microsoft Word or Excel source documents
HTML Input Files (page 5-43) XML Input Files (page 5-36) PDF Input Files (page 5-36)	A note about HTML, XML and PDF files as input files
Graphics as Input Files (page 6-124)	A note about graphics as input files
Disk Space (page 2-6)	Recommended disk space for translating Content Publisher projects
Anti-Virus Software (page 2-5)	A special note about using Site Builder while running anti-virus software
Styles in Microsoft Excel (page 6-48)	A note about styles in Microsoft Excel spreadsheets

See	For
Styles in Microsoft PowerPoint (page 6-49)	A note about styles in Microsoft PowerPoint presentations

Text Formats Supported

Application / Format	Version
Word processing – DOS	
ANSI Text (7 & 8 bit)	all versions
ASCII Text (7 & 8 bit)	all versions
DEC WPS Plus (DX)	through 4.0
DEC WPS Plus (WPL)	through 4.1
DisplayWrite 2 & 3 (TXT)	all versions
DisplayWrite 4 & 5	through 2.0
Enable	3.0, 4.0, 4.5
First Choice	through 3.0
Framework	3.0
HTML	through 3.0
IBM FFT	all versions
IBM Revisable Form Text	all versions
IBM Writing Assistant	1.01
Lotus Manuscript	through 2.0
MASS11	through 8.0
Microsoft Word	through 6.0

Application / Format	Version
Microsoft Works	through 2.0
MultiMate	through 4.0
Navy DIF	all versions
Nota Bene	3.0
Novell WordPerfect	through 6.1
Office Writer	4.0 through 6.0
PC-File Letter	through 5.0
PC-File+ Letter	through 3.0
PFS:Write	A, B, C
Professional Write	through 2.1
Q&A	2.0
Samna Word	through IV+
SmartWare II	1.02
Sprint	1.0
Total Word	1.2
Unicode Text	all versions
Volkswriter 3 and 4	through 1.0
Wang PC (IWP)	through 2.6
WordMARC	through Composer+
WordStar	through 7.0
WordStar 2000	through 3.0
XyWrite	through III Plus

Application / Format	Version
Word processing – Windows	
Adobe FrameMaker (MIF)	6.0
Corel/Novell WordPerfect	through 12.0
Hangul	2002 (full conversion)
JustSystems Ichitaro	5.0, 6.0, 8.0 through 13.0, 2004
JustWrite	through 3.0
Legacy	through 1.1
Lotus Ami/Ami Professional	through 3.1
Lotus WordPro (Intel platforms)	96 through Millennium Edition 9.6
Microsoft Rich Text Format (RTF)	all versions
Microsoft Word	through 2003
Microsoft WordPad	all versions
Microsoft Works	through 4.0
Microsoft Write	through 3.0
Novell Perfect Works	2.0
Professional Write Plus	1.0
Q&A Write	3.0
StarOffice / Open Office Writer	5.2, 6.x, 7.x / 1.1 (text only)
Unicode Text	all versions
WordStar	1.0
Word Processing – Macintosh	
MacWrite II	1.1

Application / Format	Version
Microsoft Word	3.0, 4.0, 98, 2001, 2004
Microsoft Works	through 2.0
Novell WordPerfect	1.02 through 3.0
Word Processing – Unix	
Star Office Writer	Version 5.2
Spreadsheet	
Enable	3.0, 4.0, 4.5
First Choice	through 3.0
Framework	3.0
Lotus 1-2-3 Charts (DOS/Windows)	through 5.0
Lotus 1-2-3 (DOS/Windows)	through 5.0
Lotus 1-2-3 (OS/2)	through 2.0
Lotus 1-2-3 for SmartSuite	97 through Millennium 9.6
Lotus Symphony	1.0, 1.1, and 2.0
Microsoft Excel Charts	2.x through 7.0
Microsoft Excel (Mac)	3.0 through 4.0, 98, 2001, 2004
Microsoft Excel (Windows)	2.2 through 2003
Microsoft Multiplan	4.0
Microsoft Works (Mac)	through 2.0
Microsoft Works (Windows)	through 4.0
Microsoft Works (DOS)	through 2.0
Mosaic Twin	2.5

Application / Format	Version
Novell Perfect Works	2.0
PFS:Professional Plan	1.0
Quattro Pro (DOS)	through 5.0
Quattro Pro (Windows)	through 12.0
SmartWare II	1.02
StarOffice / Open Office Writer	5.2, 6.x, 7.x / 1.1 (text only)
SuperCalc 5	4.0
VP Planner 3D	1.0
Presentation	
Corel/Novell Presentations	through 12.0
Harvard Graphics (DOS)	2.x, 3.x
Harvard Graphics (Windows)	all versions
Freelance (Windows)	through Millennium 9.6
Freelance (OS/2)	through 2.0
Microsoft PowerPoint (Windows)	3.0 through 2003
Microsoft PowerPoint (Mac)	4.0 through 2001, 2004
StarOffice / Open Office Writer	5.2, 6.x, 7.x / 1.1 (text only)
Databases	
Access	through 2.0
dBASE	through 5.0
DataEase	4.x

Application / Format	Version
dBXL	1.3
Enable	3.0, 4.0, 4.5
First Choice	through 3.0
FoxBase	2.1
Framework	3.0
Microsoft Works (Mac)	through 2.0
Microsoft Works (Windows)	through 4.0
Microsoft Works (DOS)	through 2.0
Paradox (DOS)	through 4.0
Paradox (Windows)	through 1.0
Personal R:BASE	1.0
Q&A	through 2.0
R:BASE 5000	through 3.1
R:BASE System V	1.0
Reflex	2.0
SmartWare II	1.02
Other	
Executable (EXE, DLL)	no specific version
ID3 (MP3, AAC, WMA, Ogg Vorbis, etc.)	text only
Macromedia Flash (SWF)	text only
Microsoft Outlook Express (EML)	
Microsoft Outlook Folder (PST)	97, 98, 2002, 2003

Application / Format	Version
Microsoft Outlook Message (MSG)	all versions
Microsoft Project 98	98 through 2003 (Datasheet view)
Microsoft Visio	2003
Mime Internet mail format	
vCalendar Scheduling	1.0
vCard Electronic Business Card	Versit 2.1
WML	specification 5.2
XML	text only
Yahoo Instant Message (YIM)	text only

In addition to the above text formats, Site Builder supports many graphics formats. (See Graphics Formats Supported on page 6-170.)

You can also pass through source documents to preserve the original file type or file extension, such as HTML, XML, PDF, and so on. (See About Pass-Through Conversion on page 5-37.)

OLE Object Support

If a source document created in Microsoft Word or Excel (version 97 or 2000) contains an embedded OLE object, Site Builder will, if possible, export a copy of that object. It will create not only an output graphics file as a graphical representation of the object, but also a file for the linked object itself. It will then attempt to link the graphical representation of the OLE object in the output Web page to that file. If that object-type is supported by the browser setup, clicking the graphic will display the object in its native format (assuming you have the appropriate application installed on your machine).

Site Builder cannot export multimedia objects (only the graphical representation of the file will display in the output page).

To enable this functionality, you must check "Preserve links to embedded OLE objects where possible" on the Options tab dialog of Globals for the template you associate with

your source documents. Also, in the source document itself, be sure to turn off the options "Float Over Text" and "Link to File" for the object.

See Preserving Links to Embedded OLE Objects on page 6-203.

REFERENCE PAGES

This section covers the following topics:

- About Reference Pages (page 5-52)
- Adding a Reference Page (page 5-53)
- Creating Reference Pages (page 5-53)
- Removing a Document or Reference Page From a Publication (page 5-54)

About Reference Pages

A reference page is an optional page that Site Builder builds when you turn source documents into body pages. There are five types of reference page. Their content (except for the Query page) is derived from one or more body pages and is automatically linked to them.

Publication Table of Contents (TOC)—Used to summarize the content of a publication. Not to be confused with the page TOC. Site Builder can also create a page TOC for each body page. This is part of the body page and summarizes the content of only that page.

List of Figures (LOF)—Can be used to create a special reference page that lists the figures in source documents.

List of Tables (LOT)—Can be used to create a special reference page that lists the tables in source documents.

Index—If the source documents contain index markers, Site Builder can use these entries to automatically generate an index, and link the index entries to the content of the body pages.

Query—Used to search the contents of you Web publication (in fact, the complete contents of the Content Server in which the Web publication resides). See Query Reference Page (page 6-191) for more information.

You create a TOC, LOF, or LOT in exactly the same way. And you can promote any content from any source documents to any one, two, or all three of these reference pages.

Adding a Reference Page

A Web publication consists of two types of Web pages: body pages, which Site Builder creates when it translate a source documents, and optional reference pages, which Site Builder builds during translation.

Each publication can have four types of reference page (see About Reference Pages on page 5-52), which you add to the publication one at a time.

- 1. Do one of the following:
 - Right-click anywhere in the Contents pane and choose Add Reference Page from the popup menu.
 - Click Add Reference Page () on the toolbar or large toolbar.
 - Choose Reference Page from the Add menu.

The Add Reference Page dialog box opens.

2. Select the type of reference page you want to add, choose the appropriate template from the drop-down list, and click **OK**.

You can create an Index only if your source document contains index markers.

The Query is a special type of reference page that is used to search for content on a Web site. Once you add a Query page to a project, you must then specify the page in **Globals**. See Query Reference Page (page 6-191) for more information.

Creating Reference Pages

Creating a reference page is a three-step process, consisting of:

- Adding a reference page to a publication—In the Add Reference Page dialog box, you decide which reference page you want to add to your publication. (You can add all of them, if you want.) At this stage, the reference page has no content. It simply appears as an output page in the Contents pane.
- Promoting elements from source documents—You promote elements by editing the template containing those elements. You do this in the Promote tab dialog of Element Properties in Element Setup. When you "promote" elements, you simply make them available for inclusion in any reference page you choose to build. At this stage, the reference page still has no content.
- Selecting which of the promoted elements should be placed in the reference page—Since any promoted element is available for inclusion in any reference page, you must edit the template for the specific reference page you want to include the

promoted elements. (The same elements can be promoted to more than one reference page.) That is, you must formally add the element to the body of the reference page (in the Elements tab dialog of **Element Setup**). When this is done, you have determined what content will appear in the reference page once you translate the publication and build the reference page.

By default, the elements Heading 1 and Title (System) are promoted from source documents to the publication TOC (the latter is promoted as "Title").

The above applies to the publication TOC, List of Figures, and List of Tables. The Index is a special type of reference page that you can create only if your source documents contain index markers. Also, promotion is not required for an Index, since standard default elements are used for content.

The Query reference page is also a special reference page, which is used to search the content of your Web publication. Once you add a Query to your Web publication, you must set options for the page in the Query tab dialog of **Globals**. See Query Reference Page (page 6-191) for more information.

Removing a Document or Reference Page From a Publication

You can remove a document or reference page from a publication at any time.

To remove a document or reference page:

- 1. In the Contents pane, select the source document or reference page.
- 2. Click **Delete** (X) on the toolbar or choose **Delete** from the Edit menu.

When you delete a source document or reference page in this way, you simply remove the source document or reference page from the publication. The original source document is unchanged. The template associated with the document or reference page is still available in the publication.

If you delete a source document or reference page after you have translated a publication, you might also want to the delete the appropriate files from your output directory.

You can also use the Cut command from the Edit menu or toolbar. If you do, and change your mind, you can then use the Paste command to return the source document or reference page to the publication.

TEMPLATES

A template is a set of formatting instructions you can associate with one or more source documents in a publication. It is saved as part of the project file.

When you add a document to a publication, you associate a template with that document. When Site Builder imports styles (or patterns) from the document, it automatically generates an element for each style (or pattern), and places the elements in the template. (If you use the default setting None in the Choose Template dialog box, Site Builder will associate ranks with elements instead.)

To turn a source document into a Web page, you select the template associated with the document and edit the template, using the four Template Editing Options (page 6-9).

You can associate only one template with any given source document, but you can associate the same template with many different documents.

A template typically isn't a standalone file, but you can export a template to create one. You can then import the template file into another project (to become an internal template).

Alternatively, any workstation with access to a standalone template file on the file system can link to that template and use the template to format source documents. However, you cannot change the settings of a template while it is linked. You must import the linked template into a project in order to modify it.

If the template associated with a document is internal, you can change it at any time. In the Contents pane, select the template and open the Choose Template dialog box. (You can also open the Choose Template dialog box from the Document Properties dialog box.)

See Chapter 6 (*Templates*) for more information about templates.

LAYOUT OPTIONS

This section covers the following topics:

- Layout Options: Frameset, HTML Table, and Custom Table (page 5-56)
- HTML Framesets (page 5-57)
- HTML Tables (page 5-68)
- Custom HTML Tables (page 5-84)

Layout Options: Frameset, HTML Table, and Custom Table

The Layout feature can be used to create a frameset, HTML table, or custom table layout for your Web publication.

With a frameset layout, you use the individual frames for site navigation, source content, and referencing other files in a Web browser. Table-based layout can accomplish the same, while also lending structure and appearance to the Web page. Custom table layout gives you the opportunity to create your own Web page layout, possibly from a third-party HTML editor, and then use that layout for your Web publication.

Figure 5-1 Layout options

Publication Hierarchy	
Active Layout None Frameset Layout Table Layout C Custom Table Layout	This publication has no active layout
Components:	

When you first enter the Layout dialog box, the default setting under Active Layout is None. Once you select **Frame Layout** or **Table Layout**, you have a similar set of options available to create the frameset or table you want. You can select from the components in the lower left, place them in a frame or HTML table, and use the buttons on the right to modify the frameset or table properties.

If you select **Custom Table Layout**, you can copy and paste the supplied tokens (static, dynamic, and template) into your own custom HTML. You can include the HTML in the text box or browse to a separate HTML file on your file system or in Content Server.

You apply the layout to a single publication at a time (either the root or a subpublication) by selecting the publication in the **Publication Hierarchy** window. You can use the same layout for some or all of the publications in a project, and can easily apply one layout

you've created to any other publication. (See Copying a Frameset on page 5-59 and Copying an HTML Table on page 5-72.)

Framesets, HTML tables, and custom tables layout are explained in greater detail in the following Help topics:

- About Framesets (page 5-58)
- About HTML Tables (page 5-69)
- About Custom Table Layout (page 5-68)

You must assign a component to each frame of a frameset before you can switch to Table layout or exit the Layout dialog box. And you must assign the Body Pages icon to one of the cells of an HTML table before you can switch to the Frameset layout or exit the Layout dialog box. If you create a frameset or table and then change your mind, you can simply delete the existing layout and then exit the Layout dialog.

HTML Framesets

This section covers the following topics:

- About Framesets (page 5-58)
- Associating a Frameset With a Publication (page 5-58)
- Copying a Frameset (page 5-59)
- Creating a Frameset (page 5-59)
- Editing a Frameset (page 5-61)
- Editing Frame Properties (page 5-61)
- Editing Frameset Properties (page 5-62)
- Frame Properties (page 5-62)
- Frameset Properties (page 5-63)
- Handling an Event Within a Frameset (page 5-64)
- Populating the Frames of a Frameset (page 5-65)
- Targeting a Frameset (page 5-65)
- ♦ Adding a Frameset to the Frameset Gallery (page 5-66)
- Applying a Frameset From the Gallery (page 5-67)

- Selecting a Frameset From the Gallery (page 5-67)
- Selecting a Frameset From the Gallery (page 5-67)

About Framesets

A frameset is a structure of frames used to organize the content of a Web publication and control where content displays in a Web browser. You can create a frameset of a single frame or leave a publication unframed. But in either case your ability to display content and permit navigation through your Web publication will be severely limited.

Most publications will benefit from a frameset of at least two frames (one for a table of contents, the other for body pages). By using several frames, you can create a potentially more powerful publication that displays different kinds of information onscreen at the same time and offers the user multiple navigation options.

Each publication can have its own frameset. Alternatively, the same frameset can be used for some or all the publications in a project. Site Builder lets you populate the frames of a frameset with different kinds of content and to associate an event with the frameset itself.

Any frameset created for one project can be available for all other projects by adding it to the Frameset Gallery.

Associating a Frameset With a Publication

The Frameset Gallery contains all the framesets that are available to you in Site Builder. Included are those shipped with Site Builder as well as any you choose to create and add to the Gallery.

You can associate any frameset from the Gallery with one or more publications in your project.

- 1. Click **Layout** () on the toolbar to open the Layout dialog box.
- 2. In the Publication Hierarchy box, select the publication you want to associate a particular frameset with. If a frameset is already associated with the publication, it will display in the Frameset window.
- 3. Click **Gallery** to open the Frameset Gallery dialog box.
- 4. Select the frameset you want to associate with the publication and click OK.
- 5. Select one of the three options, depending on whether you want to apply the frameset to the selected publication, to that publication and its subpublications, or to all publications in the project.
- 6. Select the Active Layout option to make the frameset active for this publication.

7. Click **OK** to return to the main window.



Tech Tip: The simplest way to review all the framesets in a project is to enter the Layout dialog box. As you click on each publication in the Publication Hierarchy box, the frameset associated with the publication will display in the frameset window.

Copying a Frameset

You can simplify the creation of framesets by copying the frameset for one publication and applying it to one or more other publications in the same project.

- 1. In the Layout dialog box, right-click the publication in the Publication Hierarchy box for the frameset you want to copy. The frameset appears in the Frameset window opposite.
- 2. Choose **Copy** from the popup menu.
- 3. To apply the frameset to a single publication, right-click the target publication and choose **Paste** from the popup menu.
- 4. To apply the frameset to a specific publication and all its subpublications, right-click the target publication, choose **Paste Special** from the popup menu, and then choose **This publication and all subpublications** from the submenu.
- 5. To apply the frameset to all publications in the project, right-click any publication, choose **Paste Special** from the popup menu, and then choose **All publications in the project** from the submenu.
- 6. Click **OK** to return to the main window.

A frameset must be valid in order to copy and apply it to other publications. That is, you must assign content to each frame. (You can accomplish this, for example, by assigning a TOC to a frame in the Layout dialog box, even though you haven't formally added a TOC to your project.)

When you copy a frameset, you copy the frameset structure, the frame names and assigned content, and all frameset and frame properties.

Creating a Frameset

Each publication in a publication hierarchy can have its own frameset. You can either create a new frameset for the publication or select an existing frameset from the Gallery. (See Selecting a Frameset From the Gallery on page 5-67.)

- 1. Click **Layout** () on the toolbar or right-click anywhere in the Publication Hierarchy pane and choose **Layout** from the popup menu to open the Layout dialog box.
- 2. In the Publication Hierarchy box, select the publication you want to create a frameset for and then select **Frame Layout** beneath the Active Layout field.
- 3. Click the **New Vertical** or **New Horizontal** button to start the process of creating the frameset. Add additional frames to complete the frameset (see Tips below).
- 4. If necessary, drag-and-drop the Body Pages icon to another frame. (Body pages can populate only a single frame of a frameset but this can be any frame.)
- 5. To add reference pages to the frameset, drag-and-drop icons from the Components box to the appropriate frames.
- 6. To populate a frame with something other than body or reference pages, double-click the frame to open the Frame Properties dialog box.
- 7. Click the **Contents** tab. Select **This specific page** and enter the path and name of the file you want to include or reference, or click **Browse** to locate the file.
- 8. Click **OK** to return the Layout dialog box. To save the frameset for use with other projects or publications, click **Add to the Gallery**.
- 9. Click **OK** to return to the main window.

Tips

- To add a frame, right-click an existing frame and choose New Vertical or New Horizontal from the popup menu. You can also place your cursor on any existing frame border or the outside edge of the frameset, press the Control key, and use dragand-drop to create a new frame.
- ✤ To delete any frame, select the frame and click Delete.
- If you add a reference page icon to a frame, you must also add the reference page to the publication. Otherwise, you will create an empty frame when you translate the publication.
- Any file referenced in the Contents tab dialog of the Frame Properties dialog box will be automatically picked up by Site Builder for translation. However, if that file references a graphics file, say, then the graphics file will have to be listed in the Associated Files dialog box in order to become a part of the project.

Editing a Frameset

You can edit any frameset in your project or one that is in the Frameset Gallery.

Follow this process to edit a frameset in your project:

- 1. Click Layout ([]) on the toolbar to open the Layout dialog box.
- 2. In the Publication Hierarchy box, select the publication for the frameset you want to edit. The frameset displays in the frameset window.
- 3. Edit the frame, as appropriate.
- 4. To edit another frameset, select another publication in the Publication Hierarchy box to display the frameset for that publication in the frameset window.
- 5. To save any frameset to the Frameset Gallery, click **Add to Gallery** and either label the revised frameset with the same name (to overwrite the original version, if there is one in the Gallery) or give the frameset a new label.

Follow these steps to edit a frameset in the Frameset Gallery:

- 1. Click Layout ([]]) on the toolbar to open the Layout dialog box.
- 2. Click Gallery to open the Frameset Gallery.
- 3. Select the frameset you want to edit, and click **OK** to return to the Layout dialog box, where the frameset displays in the frameset window.
- 4. Edit the frameset.
- 5. Click **Add Frameset to Gallery**. To replace the original version of the frameset with the edited version, enter the same label in the textbox and click **OK**. To add the revised frameset to the Gallery while keeping the original version of the frameset, enter a new label and click **OK**.
- 6. Click **OK** in the Layout dialog box to return to the main window.

To edit a frameset, you change the properties of the frameset in the Frameset Properties dialog box and the properties of individual frames in the Frame Properties dialog box.

Editing Frame Properties

The properties of a frame are summarized in the Frame Properties dialog box. You can change these properties at any time.

To edit the properties of a frame:

1. In the Layout dialog box, double-click the frame you want to edit.

- 2. In the Frame Properties dialog box, edit each of the fields, as appropriate.
- 3. Click OK.

See Frame Properties (page 5-62) for details on each of the fields in this dialog box.

Editing Frameset Properties

The properties of a frameset are summarized in the Frameset Properties dialog box. You can change these properties at any time.

- 1. In the Layout dialog box, click the **Frameset Properties button** to open that dialog box.
- 2. In the Frameset file name text box, change the name of the file, if you want to.
- 3. In the Frameset Title text box, enter the title you want to give the frameset. The title will appear in the title bar of your browser. (It will override any title you set in the Titles tab dialog of **Globals**. If you leave this box empty, the path and name of the frameset file will appear in the browser title bar, instead.)
- 4. Under Events, click **Include HTML or scripting code** in the frameset if you want to include code in the frameset. Then make the appropriate selection depending on whether you are specifying the code itself or specifying a file that contains the code. (If the latter, see Handling an Event Within a Frameset (page 5-64).)

If you reference a file that is in Content Server, this will activate the **Info** (**1**) button and thereafter you will be able to open the Content Information page for that file.

5. Click **OK** to return to the Layout dialog box.

Frame Properties

The properties of a frame are summarized in the Frame Properties dialog box.

The General tab dialog contains:

- Name—The default name of the frame, which is used when linking between frames.
 For example, this would be the target name if you want another Web publication to display in the frame. Site Builder assigns a unique name to each frame of a frameset.
- Title—The title of the frame, which will appear in the source for the frameset. (Disabled visitors to your Web site can view this information in an HTML screen reader and thus quickly navigate through your Web site to read the contents of those frames they are interested in. Ideally, your frame titles should be as descriptive as

possible.) Once you create a title that is different from the frame name, the title will be visible at the top of the frame in the Layout dialog box.

- Sizes—Lets you adjust column width and row height, which may be "relative" by default where the size of one frame is determined by the size of another frame. For example, if you set a specific width for a TOC in the left-hand frame of a two-frame frameset, this will determine the column width of the second frame. Both measurements can be set in pixels or as a percentage of screen size (the default).
- Options—Settings for the border between frames, to allow users to re-size frames, and to display scrollbars. The first two options should be set the same for adjacent frames. A scrollbar will only appear in a frame of a Web publication if you select the Scrollable check box and the scrollbar is necessary in order to display additional information in the frame.
- Margins—Determine the distance (in pixels) between content and the borders of a frame. For text, you will probably want a margin. For graphics, you may want to eliminate the margin all together. To do this, select both check boxes and set the values to zero (as opposed to clearing the check boxes). This is best because different browsers may interpret this setting differently.

The **Contents tab dialog** contains options for content. If you have assigned one or more icons for body pages and reference pages to a frame, these will display in the Components box. Alternatively, you can specify a graphics file or other file here.

To open the Frame Properties dialog box, double-click the frame in the frameset in the Layout dialog box. To edit the properties of a frame, see Editing Frame Properties (page 5-61).

Any file referenced in the Contents tab dialog is automatically an "associated file" and will be translated by Site Builder with all the other files in your project. However, if the referenced file contains a reference to another file – say, a graphics file – that file should be added to your list of Associated Files. See Associating a File With a Publication (page 5-99).

If you reference a file that is in Content Server, this will activate the **Info** () button and thereafter you will be able to open the Content Information page for that file.

Frameset Properties

The properties of a frameset are summarized in the Frameset Properties dialog box. You can change these properties at any time, by clicking the Frameset Properties button in the Layout dialog box.

- Name The name of the frameset. Site Builder uses the same default name, Frame.htm, for every frameset. If you change the extension of output files to html, the name for any new frames created will be Frame.html.
- Frameset title The title that will appear in the title bar of your browser. See Editing Frameset Properties (page 5-62).
- Events Allows you to associate an event with a frameset, so that a particular event is triggered each time the frameset opens. See Handling an Event Within a Frameset (page 5-64).

Handling an Event Within a Frameset

You can assign an event handler to a frameset that is triggered each time an event occurs in your browser. Such an event handler might be onLoad or onUnload. You could also include HTML code or JavaScript within the frameset.

- 1. Click Layout () on the toolbar to open the Layout dialog box.
- 2. In the Publication Hierarchy box, select the publication containing the frameset you want to edit and click the **Frameset Properties** button to open that dialog box.
- 3. Under Events, click **Include HTML or scripting code in the frameset**, and then click either **Use the following** or **Use the contents of this file**.
- 4. If you click Use the following, enter the code you want to use in the box provided.
- 5. If you click **Use the contents of this file**, enter the path and file name in the text box, or click **Browse** to locate the file, or click **Gallery** to pick a file from the HTML Code folder in the Gallery.
- 6. Click OK.

If you select **Use the contents of this file** and the referenced file references another file, such as a graphic, this file should be listed in Associated Files so that Site Builder will copy this file to the output directory when you translate the publication. See Associating a File With a Publication (page 5-99).

If you reference a file (step 5) that is in Content Server, this will activate the **Info** (**1**) button and thereafter you will be able to open the Content Information page for that file.

To temporarily remove an event handler from a frameset but keep it available for future use, clear the **Include HTML or scripting code in the frameset** check box. When you're ready to assign the event handler once more within the frameset, select the check box.

See Handling an Event Within a Body Page (page 6-179), Handling an Event for an Element (page 6-23), and Tokens for Adding HTML Code (page 6-186).

Populating the Frames of a Frameset

You can populate the frames of a frameset with different kinds of content.

- Body pages—By default, the Body Pages icon is automatically added to one of the frames as you create a frameset. Body pages can be assigned to only a single frame in the frameset, but you can drag-and-drop the Body Pages icon to place this content in any frame.
- Reference pages—You can assign one, several, or all the reference pages to frames, using drag-and-drop to move the icons from the Components box to the appropriate frames. You can even assign more than one type of reference page to the same frame. If you do, you will have to be sure to link the reference pages.
- Other—In addition to body and reference pages, you can populate frames in other ways. For example, you could assign a banner graphic to a frame or specify a URL for a Web site to display in that frame. You do this by selecting a frame in the Layout dialog box and opening the Contents tab of the Frame Properties dialog box.

In addition to populating the frames of a frameset, you can also associate an event with the frameset itself. See Handling an Event Within a Frameset (page 5-64).

Depending on what type of content you assign to a frame in the Frame Properties dialog box, you may also need to reference files or graphics in the Associated Files dialog box. See Associating a File With a Publication (page 5-99).

Targeting a Frameset

If the publication you create is to be placed within a user-defined frameset, you will have to specifically target the user-defined frameset in your publication.

If you accept the default link when creating a Web publication in Site Builder, and your publication is referenced from within a user-defined frameset, problems inevitably arise as soon as you navigate within the publication. That's because any references to the default TARGET=_top override the existing frameset. Instead of appearing within just a single frame of the existing frameset, the publication takes control of the whole browser window.

To avoid this, you can specify a parent frame in an existing frameset within which the publication must appear. You do this by replacing the standard attribute parameter "_top" with one of your own, which can be used to reference the publication in any links within the existing frameset.

1. On the View menu, click **Project Options** to open that dialog box.

2. On the General tab dialog, under Containing Frame Name, enter the name of the target frame of the user-defined frameset. For example, you might target the frame named "custom" in the existing frameset (an underscore before "custom" is not required).

Any new frame name you enter will be available from the drop-down list when you enter the Project Options dialog box in future.

3. Click **OK** to return to the main window, and click **Save** () to save the change to your project file.

Adding a Frameset to the Frameset Gallery

The Frameset Gallery contains all the framesets that are available to you in Site Builder. Included are those shipped with Site Builder as well as any you choose to create and add to the Gallery.

A given publication can have only one frameset associated with it, but you can associate the same frameset with some or all of the publications in a given project. When you select a frameset from the Gallery, Site Builder gives you the option of applying the frameset to the publication only, to the publication plus all subpublications of the publication, or to all publications and subpublications in the project.

You can edit framesets at any time, including those shipped with Site Builder. You can also delete any frameset in the Gallery.

You can create new framesets and add them to the Gallery at any time.

- 1. In the Layout dialog box, create the frameset you want to preserve for future use.
- 2. Click the Add Frameset to Gallery button to open that dialog box.
- 3. In the text box, type the name you want to use for the frameset. Add a description of the frameset if you feel this will be useful when selecting a frameset from the Gallery in the future.
- 4. Click **OK**. The new frameset has now been added to the Framesets Gallery. You can confirm this by clicking the Frameset Gallery button to open the Gallery.

The frameset you have created can be associated with any publication.

The frameset name and the frameset file name are not the same. The frameset name is simply the name you give a frameset when you save it in order to differentiate it from other framesets in the Gallery. The frameset file name is a property of a frameset (see the Frameset Properties dialog box), which can be important when creating navigation links.

Applying a Frameset From the Gallery

The Frameset Gallery contains all the framesets available to you for your projects in Site Builder. Included are those shipped with Site Builder as well as any you choose to create and add to the Gallery.

When you open any frameset from the Gallery for a specific publication, you can apply the frameset to some or all of the other publications in the project, if you want.

- 1. In the Frameset Gallery, select the frameset you want to use and click **OK**. The Apply Gallery Frameset dialog box opens.
- 2. Select one of the three options, depending on whether you want to apply the frameset to just the selected publication, to that publication and its subpublications, or to all publications in the project.
- 3. Select the Active Layout option to make the frameset active for this publication.
- 4. Click OK.

You can also apply any existing frameset within a project to some or all the other framesets in a project. See Copying a Frameset (page 5-59).

Selecting a Frameset From the Gallery

The Frameset Gallery contains all the framesets that are available to you in Site Builder. Included are those shipped with Site Builder as well as any you choose to create and add to the Gallery. You can select any frameset from the Framesets Gallery to associate with one or more publications in your project.

- 1. Click **Layout** () on the toolbar or right-click anywhere in the Publication Hierarchy pane and choose **Layout** from the popup menu to open the Layout dialog box.
- 2. In the Publication Hierarchy box, select the publication you want to associate a frameset with and then select **Frame Layout** beneath the Active Layout field (if the publication is not currently associated with a frameset).
- 3. Click Gallery to Open the Framesets Gallery.
- 4. From the list of available framesets, select the one you want to associate with the selected publication and click **OK**.
- 5. In the **Apply Gallery Frameset** dialog box, select one of the three options for applying the frameset to the publications in your project.
- 6. Click OK.

If you apply the frameset to a publication and all its subpublications and later create a new subpublication for that publication, you will have to apply the frameset to the new subpublication.

HTML Tables

This section covers the following topics:

- About Custom Table Layout (page 5-68)
- About HTML Tables (page 5-69)
- Associating an HTML Table With a Publication (page 5-69)
- Cell Properties of an HTML Table (page 5-70)
- Copying an HTML Table (page 5-72)
- Creating an HTML Table (page 5-73)
- Editing an HTML Table (page 5-74)
- Editing the Cell Properties of an HTML Table (page 5-75)
- Editing the Table Properties of an HTML Table (page 5-76)
- HTML Table Cells and Dynamic Includes (page 5-77)
- Populating the Cells of an HTML Table (page 5-80)
- Table Properties of an HTML Table (page 5-81)
- HTML Table Gallery (page 5-83)

About Custom Table Layout

One of the layout options in Site Builder is to create your own Web site layout by using custom table layout. This option is especially useful if you are creating your Web site look and feel in a third-party HTML editor such as Macromedia Dreamweaver, Microsoft FrontPage, or Adobe GoLive.

You can create a custom table layout by inserting reference pages and body pages that use the tokens supplied on the Custom Table Layout page of the Layout dialog box. (See Tokens for Adding HTML Code on page 6-186.)

On the Custom Table Layout page, the tokens are grouped in three columns: For Static Inclusion, For Dynamic Inclusion, and Template Tokens. A static include token can be pasted directly into your HTML code. (Just select and copy the token, and then paste it

into your HTML code.) A static include places the contents of the reference page directly in the output page. Each time the source file is changed, a static include will rebuild your Web page. So you may encounter a performance degradation not found with a dynamic include.

You can create a dynamic include in the same way. A dynamic include requires scripting syntax around the dynamic include token. This scripting syntax will depend on the scripting language you have chosen for your include (Idoc, ASP, SSI, or JSP). A Web page with dynamic includes is assembled by the Webserver when the page is requested. For syntax examples, see HTML Table Cells and Dynamic Includes (page 5-77).

The third column on the Custom Table Layout page is for template tokens, which act as placeholders for HTML markup from templates.

Your custom HTML will be included in the output pages of your publication when you translate, stage, and publish. Any file that is referenced in your custom HTML (graphics, templates, CSS, etc.) will not be automatically included. As such, you will need to add these files as associated files to your project. (See Associating a File With a Publication on page 5-99.)

About HTML Tables

HTML tables are similar to tables in a source document. However, in addition to using HTML tables to present information in a tabular fashion, you can also use them to control the layout of a Web page.

An HTML table comprises individual cells (just as a frameset comprises frames). With a simple table of two cells, you could use the left cell for your site navigation and the right cell for body content. With a more sophisticated table that has multiple cells, you could place text, graphics, and various objects in the different cells. You can also assign table attributes and scripting events (onClick, onMouseOver, etc.) to the table itself.

Most publications would benefit greatly from the use of an HTML table layout. Current Web site design practices include the creative placement of items on a Web page, and HTML tables let you do just that. Each publication in your project can have its own table, or the same table can be applied to some or all of the publications in the project, thus allowing you to assign a mixture of static and dynamic content in a variety of ways.

Associating an HTML Table With a Publication

The Table Gallery contains all the tables available to you for your projects in Site Builder. Included are the sample tables that are shipped with Site Builder as well as any tables you choose to create and add to the Gallery. You can associate any table from the Gallery with one or more publications in your project.

- 1. Click **Layout** () on the toolbar to open the Layout dialog box.
- 2. In the Publication Hierarchy window, select the publication you want to associate a particular table with. The existing table layout will display in the viewing area. If no table is associated with the publication, select **Table Layout** beneath the Active Layout field.
- 3. Click **Gallery** to open the Table Gallery dialog box.
- 4. Select the table you want to associate with the publication and click OK.
- 5. Select one of the three options, depending on whether you want to apply the table to the selected publication, to that publication and its subpublications, or to all publications in the project.
- 6. Select the Active Layout option to make the table layout active for this publication.
- 7. Click **OK** to return to the main window.

The simplest way to review all the tables in a project is to enter the Layout dialog box. As you click on each publication in the Publication Hierarchy box, the table associated with the publication will display in the table window.

The HTML table selected for a publication will be applied to each document in the publication. If you want to assign a unique table to a specific document, first create a publication for that document and then assign the table to that publication.

If you are associating an HTML table that contains dynamic scripting (IDOC, ASP/SSI, or JSP), then you must modify your publication to recognize that scripting language. See HTML Table Cells and Dynamic Includes (page 5-77).

Cell Properties of an HTML Table

An HTML table has both table and cell properties. The cell properties are summarized in the Cell Properties dialog box. You can view the properties by selecting a cell and clicking the **Cell Properties** button on the Layout dialog box. (See Table Properties of an HTML Table on page 5-81.)

Attributes Tab

Width and Height—Can be adjusted independently of table width and height. You can specify this value in pixels to maintain a specified aspect ratio or as a percentage

of the table, which will resize with a Web browser. This value can be changed in the Layout viewing area as well, using your mouse drag-and-drop \leftrightarrow function.

- Alignment—Controls the horizontal placement of text and graphics inside of a cell, much like the paragraph attributes of a Web page.
- Vertical alignment—Controls the vertical placement of text and graphics inside a cell.
- Background color—Creates a new background for the individual cell in a table, which will override the background color applied to the table itself.
- No wrap—Controls the behavior of the text in the cell. With this option selected, the text will extend beyond the margin of the Web page without returning to the next line.
- Header cell—Places an emphasis on the text inside the cell by making the default text centered and bold.

Contents Tab

- Don't specify or The following component—Determines what content will appear in the cell. You can choose a component from your publication (Body Pages, TOC, Query, etc.) or use your own HTML (<Custom HTML>).
- Include statically or Include dynamically—Allows you to include content statically or dynamically. To place content dynamically in the cell, you must select a scripting language: IDOC (proprietary to Content Server), ASP (Active Server Pages) / SSI (Server Side Include), JSP (JavaServer Pages) or your own scripting language. See HTML Table Cells and Dynamic Includes (page 5-77).
- Use the following or Use the contents of this file—Allows you to place the cell content in the field provided or to attach a file from your file system or from Content Server.

Events Tab

- Include HTML or scripting code in the cell tag—Allows you to include custom HTML or script inside the HTML cell tags. An example might be an event handler such as onClick or onMouseOver.
- Use the following or Use the contents of this file—Allows you to enter the contents of your script in the field provided or to use the Browse and Gallery buttons to locate a remote file.

If you reference a file that is in Content Server, the Info () button becomes active and thereafter you will be able to open the Content Information page for this file.

Copying an HTML Table

You can simplify the creation of HTML tables by copying an existing table for one publication and applying it to one or more other publications in the same project.

- 1. Click **Layout** () on the toolbar or right-click a publication in the Publication Hierarchy pane and choose **Layout** from the popup menu to open the Layout dialog box.
- 2. In the Layout dialog box, right-click the publication in the Publication Hierarchy box for the table you want to copy and choose **Copy** from the popup menu.
 - To apply the table to a single publication, right-click the target publication and choose Paste from the popup menu.
 - To apply the table to a specific publication and all its subpublications, right-click the target publication, choose Paste Special from the popup menu, and then choose This publication and all subpublications from the submenu.
 - To apply the table to all publications in the project, right-click any publication, choose Paste Special from the popup menu, and then choose All publications in the project from the submenu.
- 3. Click **OK** to return to the main window.

When you copy a table, you copy the table structure, assigned cell content, and all table and cell properties.

HTML tables are applied to each document in a publication. If you want to copy a table to a specific document, first create a publication for that document, and then copy the table layout to the publication.

If you are copying an HTML table that contains dynamic scripting (IDOC, ASP/SSI, or JSP), then you must modify your publication to recognize that scripting language. See HTML Table Cells and Dynamic Includes (page 5-77).

The simplest way to review all the tables in a project is to enter the Layout dialog box. As you click on each publication in the Publication Hierarchy window, the table associated with the publication will display in the table window.

Creating an HTML Table

When you use a table-based layout for your Web publication, each publication in the publication hierarchy can have its own HTML table. You can create a new table for each publication or select an existing table from the Gallery. (See Applying an HTML Table From the Gallery on page 5-83.)

- 1. Click **Layout** () on the toolbar or right-click a publication in the Publication Hierarchy pane and choose **Layout** from the popup menu to open the Layout dialog box.
- 2. In the Publication Hierarchy window, select the publication you want to create a table for (you can select a publication other than the one selected before you opened the dialog box). Under Active Layout, select **Table Layout**.
- 3. Click the Insert Table button to open the Insert Table dialog box.
- 4. Select the number of **Rows** and **Columns** for your table. (The rows and columns organize the individual cells of your table.) Click **OK** to return to Table Layout.
- 5. To modify the table or individual table cells, place your mouse over the appropriate border until it turns into a double arrow ← and then drag the border to modify the table or cell to your preferred size. Alternatively, you can click **Table Properties** and **Cell Properties** to set the exact size in pixels or percent. (See Editing an HTML Table on page 5-74.)
- 6. To add content to a table cell, drag a component from the components window and drop it into the cell. (The Body Page icon i must be placed in one of the cells to create a table.) To add content other than a component, or to modify the way content is included in the cell, perform the following steps:
 - Select a cell and click Cell Properties (or double-click the cell) to open the Cell Properties dialog box.
 - Click the Content tab.
 - Select The following component and choose the type of content to include in the cell.
 - Select Include dynamically if you want the content to be displayed dynamically in the cell. (The Include static option will insert your content between the HTML cell tags.) See HTML Table Cells and Dynamic Includes (page 5-77).
 - Click OK to return to the Table Layout dialog box.
- 7. To save your table for use with other projects or publications, click Add to Gallery.
- 8. Click **OK** to return to the main window.

If you add a reference page icon to a cell, you must also add the reference page to the publication. Otherwise, you will create an empty cell when you translate the publication.

The Query icon is not available when you create an HTML table layout. You can still add a Query reference page to your project in the usual way, in the Contents pane. It will then be automatically placed in the table cell reserved for body pages.

Any file referenced in the Contents tab dialog of the Cell Properties dialog box will be included in your publication. However, if that file references a graphics file, then the graphics file must be listed as an associated file in order to be included in the project (see Associating a File With a Publication on page 5-99).

Unlike framesets, tables do not have a title or file name. The HTML table layout is embedded in your output Web pages.

A cell can contain only a single component (TOC, Body Page, etc.). To place different components near one another, you can create multiple cells or split your current cells.

Editing an HTML Table

Once you create an HTML table for the layout of your publication, you may want to edit that table later. (For help in creating tables, see Creating an HTML Table on page 5-73.)

- 1. Click **Layout** () on the toolbar or right-click a publication in the Publication Hierarchy pane and choose **Layout** from the popup menu to open the Layout dialog box.
- 2. In the Publication Hierarchy window, select the publication you want to modify. The existing table layout displays in the viewing area.
- Click Table Properties to modify the framework of your table layout, that is, the table itself. (See Editing the Cell Properties of an HTML Table on page 5-75.) You can quickly adjust the table height and width by placing your mouse over the border until it turns into a double-arrow (↔) and then adjust the table size.

Under Table Properties, you can modify the following attributes:

- ✤ Table height and width
- Table borders and background color
- HTML or scripting to include before and after the table
- 4. Click Cell Properties to modify the content of your table layout, that is, the individual cells of the table. (See Editing the Cell Properties of an HTML Table on page 5-75.) You can quickly adjust the cell height and width by placing your mouse over the border until it turns into a double-arrow (↔) and then adjust the table size.

Under Cell Properties, you can modify the following attributes:

- Cell height and width
- Cell alignment (horizontal/vertical) and background color
- Content of the cell (component or source document)
- 5. To split a cell, highlight the cell (or cells) and click **Split Cells**.
- 6. To merge two cells together, drag your cursor over the cells you want to merge and click **Merge Cells**. (You can also navigate through the cells by using your arrow keys on the keyboard and select multiple cells to merge by using the Shift key in combination with the arrow keys.)

If you merge two cells that both have content, the content of only one cell will be preserved. If one cell is above the other, the content of the top cell will take priority. If the cells are side by side, the content of the left cell will take priority. You should try to complete the structure of your table layout before adding content to the cells.

7. To delete your entire table layout, click **Delete Table**. (To remove individual cells, use the **Merge Cells** option.)

Table layout often resembles frameset layout. However, you can include a reference page in a cell statically or dynamically. If you choose to include the reference page dynamically, you must choose a scripting format: IDOC (Content Server format), ASP (Active Server Pages) / SSI (Server Side Include), JSP (JavaServer Pages), or your own. See HTML Table Cells and Dynamic Includes (page 5-77) for more information.

When creating a table with multiple cells, you may find yourself limited in certain instances. For example, you cannot create a table as shown in A. You would have to use the table layout shown in B, instead.

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Editing the Cell Properties of an HTML Table

An HTML table has both table and cell properties. The cell properties are summarized in the Cell Properties dialog box. You can change them at any time. (See Editing the Table Properties of an HTML Table on page 5-76.)

- 1. In the Publication Hierarchy box, select the publication you want to modify. The table layout displays in the viewing area.
- 2. Double-click the cell you want to edit or select the cell and then click **Cell Properties** to open that dialog box.
- 3. Open the **Attributes**, **Content**, and **Events** tab dialogs, in turn, to specify the values for your cell. See Cell Properties of an HTML Table (page 5-70) for details on the cell property values.
- 4. Click **OK** to return to the Layout dialog box.

A cell can contain only a single component (TOC, Body Page, etc.). To place different components near to one another, create multiple cells or split an existing cell.

If you add a reference page icon to a cell, you must also add the reference page to the publication, in the main window. Otherwise, you will create an empty cell when you translate the publication.

If you want to include content dynamically in a table cell, you must select a scripting language and then modify your publication to recognize the selected scripting language. See HTML Table Cells and Dynamic Includes (page 5-77).

Any file referenced in the **Use the contents of this file** check box is automatically included in your project and is recognized by Site Builder when you translate. However, if that file references a graphics file, then you will have to make the graphics file an associated file in order for it to become a part of the project, too (see Associating a File With a Publication on page 5-99).

You can temporarily remove an event handler from a table but retain it for future use by clearing the **Include HTML or scripting code in the table tag** check box. When you're ready to assign the event handler once more, select the check box.

Editing the Table Properties of an HTML Table

The properties of a table are summarized in the Table Properties dialog box. You can change these properties at any time. (See Editing the Cell Properties of an HTML Table on page 5-75.)

- 1. In the Publication Hierarchy window, select the publication you want to modify. The existing table layout displays in the viewing area.
- 2. Click **Table Properties** to open that dialog box.

- 3. Open the **Attributes**, **Events**, and **HTML** tab dialogs to specify the values for your table. See Table Properties of an HTML Table (page 5-81) for details on the table property values.
- 4. Click **OK** to return to the Layout dialog box.

Unlike framesets, tables do not have their own title or file name. All of the information pertaining to HTML table layout is embedded in your body and reference page output files.

Any file referenced in the **Use the contents of this file** check box will be automatically picked up by Site Builder for translation. However, if that file references another file, such as a graphic, the second file should be included in your project as an associated file so that Site Builder will copy it to the output directory when you translate the publication (see Associating a File With a Publication on page 5-99).

You can temporarily remove an event handler from a table but retain it for future use by clearing the **Include HTML or scripting code in the table tag** check box. When you're ready to assign the event handler once more, select the check box.

HTML Table Cells and Dynamic Includes

The content of the cell of an HTML table may be included statically or dynamically. "Dynamic includes" rely on a scripting language to insert content into the cell. You can choose from IDOC script, Active Server Pages (ASP) / SSI (Server Side Include), JavaServer Pages (JSP), or your own scripting language.

Each scripting language has a unique syntax for retrieving and displaying content in a Web page. Regardless of the scripting format you choose, your project will need to be modified to recognize the newly implemented script.

IDOC Script

IDOC uses its own scripting syntax with a Transit token to dynamically include an existing reference page in a table cell. (See Tokens for Adding HTML Code on page 6-186.) The appropriate scripting syntax is placed in the Use the Following text box for you:

TOC

```
<$docLoadResourceIncludes( "dDocName=" & docRootFilename("%%TRANSIT-
PATH(TOC)%%") )$>
<$include TRANSIT_TOC_RESOURCE$>
```

LOF

```
<$docLoadResourceIncludes( "dDocName=" & docRootFilename("%%TRANSIT-
PATH(LOF)%%") )$>
<$include TRANSIT_LOF_RESOURCE$>
```

LOT

```
<$docLoadResourceIncludes( "dDocName=" & docRootFilename("%%TRANSIT-
PATH(LOT)%%") )$>
<$include TRANSIT_LOT_RESOURCE$>
```

INDEX

```
<$docLoadResourceIncludes( "dDocName=" & docRootFilename("%%TRANSIT-
PATH(INDEX)%%") )$>
<$include TRANSIT_INDEX_RESOURCE$>
```

QUERY

```
<$docLoadResourceIncludes( "dDocName=" & docRootFilename("%%TRANSIT-
PATH(QUERY)%%") )$>
<$include TRANSIT_QUERY_RESOURCE$>
```

- If you choose Use the contents of this file, your attached file must follow IDOC scripting standards.
- The reference pages must use the .idoc extension and the remaining Web pages must use the .hcsp file extension and reside in Content Server to include the reference page in the table cell. (See Setting Check-In File Extensions on page 8-82 and see Overriding Staging and Publishing Options on page 8-21.)
- The template for the included reference page must contain the following HTML before and after, where xxx is the name of the reference page you are including: TOC, LOT, LOF, INDEX, or QUERY. (See Including HTML or Scripting Code in a Web Page on page 6-180.)

```
<@dynamichtml TRANSIT_xxx_RESOURCE@>
<@end@>
```

 Conflicts can occur when an included reference page retains the promoted element anchor tags. You can avoid conflicts in named anchors by omitting hyperlink targets for promoted elements. (See Omitting Hyperlink Targets for Promoted Elements on page 6-197.)

ASP (Active Server Pages) / SSI (Server Side Include)

ASP and SSI use their own scripting syntax with a Transit token to dynamically include an existing reference page in a table cell. (See Tokens for Adding HTML Code on page 6-186.) The appropriate scripting syntax is placed in the Use the Following text box for you:

TOC

```
<!--#include file="%%TRANSIT-PATH(TOC)%%"-->
```

LOF

```
<!--#include file="%%TRANSIT-PATH(LOF)%%"-->
```

LOT

```
<!--#include file="%%TRANSIT-PATH(LOT)%%"-->
```

Index

```
<!--#include file="%%TRANSIT-PATH(INDEX)%%"-->
```

Query

```
<!--#include file="%%TRANSIT-PATH(QUERY)%%"-->
```

- If you choose Use the contents of this file, your attached file must follow ASP or SSI scripting standards.
- Your publication Web pages must use the .asp (Active Server Pages) or .shtml (Server Side Includes) file extension. (See Specifying the Extension for Output Files on page 5-106.)
- Conflicts can occur when an included reference page retains the promoted element anchor tags. You can avoid conflicts in named anchors by omitting hyperlink targets for promoted elements. (See Omitting Hyperlink Targets for Promoted Elements on page 6-197.)

JSP (JavaServer Pages)

JSP uses its own scripting syntax with a Transit token to dynamically include an existing reference page in a table cell. (See Tokens for Adding HTML Code on page 6-186.) The appropriate scripting syntax is placed in the Use the Following text box for you.

Scripting syntax

```
TOC
```

<%@ include file="%%TRANSIT-PATH(TOC)%%" %>

LOF

<%@ include file="%%TRANSIT-PATH(LOF)%%" %>

LOT

```
<%@ include file="%%TRANSIT-PATH(LOT)%%" %>
```

Index

<%@ include file="%%TRANSIT-PATH(INDEX)%%" %>

Query

<%@ include file="%%TRANSIT-PATH(QUERY)%%" %>

- If you choose Use the contents of this file, your attached file must follow JSP scripting standards.
- Your publication Web pages must use the .jsp file extension. (See Specifying the Extension for Output Files on page 5-106.)
- Conflicts can occur when an included reference page retains the promoted element anchor tags. You can avoid conflicts in named anchors by omitting hyperlink targets for promoted elements. (See Omitting Hyperlink Targets for Promoted Elements on page 6-197.)

If you add a reference page icon to a cell, you must also add the reference page to the publication, in the main window. Otherwise, you will create an empty cell when you translate the publication.

Any file referenced in the **Use the contents of this file** check box is automatically a part of the project and is recognized by Site Builder during translation. However, if that file references a graphics file, then you will have to make the graphics file an associated file in order to include it in the project (see Associating a File With a Publication on page 5-99).

Active Server Pages (ASP) and Server Side Includes (shtml) use the same syntax to include a dynamic reference page. As such, they share the same default scripting button.

Content Publisher provides two sample templates that can be used to generate dynamically includable reference pages. These specially formatted templates remove the HTML head and title tags. They also avoid conflicts in named anchors by omitting hyperlink targets for promoted elements. DynamicTOC_iDoc.ttp and DynamicTOC.ttp are available in the Support directory of your product disc. DynamicTOC_iDoc.ttp is used for IDOC scripting purposes. DynamicTOC.ttp is available for all other scripting languages.

Populating the Cells of an HTML Table

You can populate the cells of a table with different kinds of content.

Body pages—Body pages (the content of your source documents) can be added to one of the cells in a table. You can drag the Body page icon () and drop it into the cell. (Alternatively, you can open the Cell Properties dialog box and on the Content tab dialog select The following component and then select Body Pages from the drop-down list.)

- Reference pages—Reference pages (for the navigation for your site) can be added to one of the cells in the table just as you add body pages.
- Other—In addition to body and reference pages, you can populate cells in other ways.
 For example, you can assign custom HTML that references a banner graphic or another Web component for your site.

Each cell can contain only a single component (Body Pages, TOC, etc.). You can place two or more different components near each another by creating multiple cells or splitting an existing cell.

The Query icon is not available when you create an HTML table layout. You can still add a Query reference page to your project in the usual way, in the Contents pane. It will then be automatically placed in the table cell reserved for body pages.

If you choose to dynamically include content in a table cell, you must choose a scripting language and then modify your publication to recognize that scripting language. See HTML Table Cells and Dynamic Includes (page 5-77).

In addition to populating the cells of a table, you can also associate an event with the table itself. See Handling an Event Within a Frameset (page 5-64).

Depending on what type of content you assign to a cell in the Cell Properties dialog box, you may also need to reference files or graphics in the Associated Files dialog box. See Associating a File With a Publication (page 5-99).

If you are populating the cells of a table with a reference page (TOC, Index, Query, etc.) and do not want promoted element hyperlinks to interfere with your table navigation, you can disable this feature. See Omitting Hyperlink Targets for Promoted Elements (page 6-197).

Table Properties of an HTML Table

An HTML table has both table and cell properties. The table properties are summarized in the Table Properties dialog box. You can view the table properties by clicking the **Table Properties** button on the Layout dialog box. (See Cell Properties of an HTML Table on page 5-70.)

Attributes Tab Dialog

Width and Height—Determines the overall size of your table, including the cells embedded in your table. You can specify this value in pixels to maintain a specified aspect ratio or as a percentage of the screen, which will resize with a Web browser. This value can be changed in the Layout viewing area as well, using your mouse dragand-drop function (\leftrightarrow).

- Wrapping—Affects the items that surround your table. When table wrapping is enabled, the text on a Web page will wrap around a table much like it can wrap around an image.
- Background color—Creates a new background for your table and all the cells embedded in your table.
- Border thickness—Controls the size of the outer edge of your table. This value can be increased to make a table stand out (such as a chart or a table listing) or it can be resized to 0 when used as a layout device.
- Cell spacing—Determines the distance between the cells in your table and is frequently used to create necessary white space between objects on a Web page.
- Cell padding—Determines the distance between the objects in a cell and the edge of the cell. Cell padding is used in the same manner that margins are used on a Web page.

Events Tab Dialog

- Include HTML or scripting code in the table tag—Allows you to include custom HTML or script inside the HTML table tags. An example might be an event handler such as onClick or onMouseOver.
- Use the following or Use the contents of this file—Allows you to enter the contents of a script in the field provided or to use the Browse and Gallery buttons to locate a remote file.

HTML Tab Dialog

- Include HTML or scripting code before the table—Allows you to place HTML or scripting before the table layout. This setting affects the entire table layout and therefore has a much broader use than the scripting options under Events.
- Include HTML or scripting code after the table—Allows you to place HTML or scripting after the table layout. You would likely use this to close out the variables or functions declared in the previous include.
- If you reference a file that is in Content Server, the Info button () becomes active and thereafter you will be able to open the Content Information page for that file.

HTML Table Gallery

This section covers the following topics:

- Applying an HTML Table From the Gallery (page 5-83)
- HTML Table Gallery (page 5-83)
- ♦ Adding an HTML Table to the Table Gallery (page 5-84)

Applying an HTML Table From the Gallery

The Table Gallery contains all the tables available to you for your projects in Site Builder. Included are the sample tables that are shipped with Site Builder as well as any tables you choose to create and add to the Gallery.

When you open any table from the Gallery for a specific publication, you can apply the table to some or all of the publications in the project.

- 1. In the Publication Hierarchy box, select the publication you want to associate an HTML table with and then select **Table Layout** under Active Layout (if the publication is not currently associated with a table).
- 2. Click **Gallery** to open the Table Gallery dialog box.
- 3. Select the table you want to use and click **OK**. The Apply Gallery Table dialog box opens.
- 4. Select one of the three options, depending on whether you want to apply the table to just the selected publication, to that publication and its subpublications, or to all publications in the project. Click **OK** to return to the Layout dialog box.
- 5. Click **OK** again to return to the main window.

You can also apply any existing table within a project to some or all of the other publications in a project. See Copying an HTML Table (page 5-72).

If you are applying an HTML table that contains dynamic scripting (IDOC, ASP/SSI, or JSP), then you must modify your publication to recognize that scripting language. See HTML Table Cells and Dynamic Includes (page 5-77).

HTML Table Gallery

The Table Gallery contains all the tables that are available to you in Site Builder. Included are those shipped with Site Builder as well as any you choose to create and add to the Gallery.

A given publication can have only one table associated with it, but you can associate the same table with some or all of the publications in a given project. When you select a table from the Gallery, Site Builder gives you the option of applying the table to the publication only, to the publication plus all subpublications of the publication, or to all publications and subpublications in the project.

You can edit tables at any time, including those shipped with Site Builder. You can also delete any table in the Gallery.

Adding an HTML Table to the Table Gallery

The Table Gallery contains all the tables available to you for your projects in Site Builder. Included are the sample tables that are shipped with Site Builder as well as any tables you choose to create and add to the Gallery.

- 1. In the Layout dialog box, create the table you want to preserve for future use.
- 2. Click the Add to Gallery button to open that dialog box.
- 3. In the label text box, type the name you want to use for the table. Add a description of the table if you feel this will be useful when selecting a table from the Gallery in the future.
- 4. Click **OK**. The new table has been added to the Table Gallery. You can confirm this by clicking the **Gallery** button to see the most current Gallery.

The table you have created can be associated with any publication.

The label you assign to your HTML table (Step 3) is simply used to differentiate it from other tables in the Gallery. The label is not used in your project or Web publication.

Custom HTML Tables

This section covers the following topics:

- Creating a Custom Table Layout (page 5-84)
- Pulling Third-Party Web Pages Into a Publication (page 5-86)

Creating a Custom Table Layout

As an alternative to a frameset layout (see Creating a Frameset on page 5-59) or an HTML table layout (see Creating an HTML Table on page 5-73), you can create your own custom table layout for a publication. A custom table layout may be ideal for those wishing to

create a Web site look and feel by using an HTML editor that they are already familiar with.

- 1. Determine where your translated source documents (reference and body pages) will be placed in the custom HTML and place the tokens accordingly.
- 2. Click **Layout** () on the toolbar or right-click a publication in the Publication Hierarchy pane and choose **Layout** from the popup menu to open the Layout dialog box.
- 3. In the Publication Hierarchy window, select the publication you want to create a custom table layout for. (You can select a publication other than the one selected before you opened the dialog box.) Under Active Layout, select **Custom Table Layout**.
- 4. Copy the appropriate token from the **For Static Inclusion** or **For Dynamic Inclusion** column and paste it into your custom HTML, where the source document (reference page or body page) should go. (See Tokens for Adding HTML Code on page 6-186.)

Dynamic includes require scripting syntax (Idoc, ASP, SSI, JSP) around the token. For syntax examples, see HTML Table Cells and Dynamic Includes (page 5-77).

- 5. Copy three tokens (all except <!-- TRANSIT CUSTOMLAYOUT(BODY) -->) from the **Template Tokens** category into your custom HTML as follows:
 - The 'TOP' token should be placed at the top of the Web page before the <HTML> tag.
 - \bullet The 'HEAD' token should be placed between the <HEAD> tags.
 - ✤ The 'Body Attributes' token should be placed in the <BODY> tag.
- 6. Finally, copy and paste all of your custom HTML from your HTML editor into the Use the following text box or browse to your custom HTML file with the Use the contents of this file option. (Your custom HTML file can be stored on a file system or in Content Server.)
- 7. Click **OK** to return to the main window.

If you add a reference page token to your custom HTML, you must also add the reference page to your publication. Otherwise, you will create an empty placeholder when you translate the publication.

Your custom HTML will be included in your publication when you translate, stage, and publish. However, if the custom HTML references another file, then that file must be added as an associated file in order to be included in the project. (See Associating a File With a Publication on page 5-99.)

You can include reference pages in your custom HTML by using static or dynamic inclusion (see Step 4). As a static include, the reference page token will be replaced with the contents of the reference page. As a dynamic include, the reference page token will be replaced with a path to the reference page file, stored on your file system or in Content Server. Dynamic includes are preferred, because they allow for incremental translation, whereas changes to source content for static includes require your project to be published in full, which may result in a performance degradation.

The custom layout is applied to each source document in the selected publication. If you want to create a custom layout for a specific document, first create a publication just for that document, and then create a custom layout for that publication.

If you create a custom layout that involves scripting (IDOC, ASP/SSI, or JSP) and dynamic includes, then you must modify the file extensions of the output files of your project to recognize that scripting language. (See HTML Table Cells and Dynamic Includes on page 5-77.)

Content Publisher provides two sample templates that can be used to generate dynamically included reference pages: DynamicTOC_iDoc.ttp (for Idoc script) and DynamicTOC.ttp (for all other scripting languages), which are located in the Support directory of the product disc. These specially formatted templates remove potentially problematic HTML tags in your dynamic includes.

If you don't place the <!--TRANSIT - CUSTOMLAYOUT(BODY)--> token, your output page will not have any body content.

Pulling Third-Party Web Pages Into a Publication

The web page you create in your third-party application, containing tokens, can be used as a custom layout for a publication. Content Publisher uses layouts to control the placement of items on a web page. (Content Publisher also uses templates to control the appearance and behavior of source content.)

Once your web page is complete in your third-party application (with template, reference, and body page tokens in place), the next step is to pull this file into a project. Depending on your company's organization, this step might be performed by another individual (one who administers Content Publisher).

1. With your project open in Content Publisher, click **Layout** () on the toolbar or right-click a publication in the Publication Hierarchy pane and choose **Layout** from the popup menu.

2. In the Layout dialog box, select the publication you want to create a custom table layout for (you can select a publication other than the one selected before you opened the dialog box). Under Active Layout, select **Custom Table Layout**.

Publication Hierarchy			
- 4 Custon Table	You may use custom HTML as the layout for documents in this publication. The following takens can be used to insert document and reference page content into the layout:		
	For Static Inclusion: - TRANSIT - LAYOUT(TOC) -> - TRANSIT - LAYOUT(LOP) -> - TRANSIT - LAYOUT(LOT) -> - TRANSIT - LAYOUT(INDEX) -> 	For Dynamic Inclusion: 2017 RANSIT PATH(TOC)23: 2017 RANSIT PATH(LOF)23: 2017 RANSIT PATH(LOT)33: 2017 RANSIT PATH(INDEX)23:	
	Template Tokens: <i- -="" customlayout(top)="" transit="" ·=""> <i- -="" customlayout(head)="" transit="" ·=""> <i- -="" customlayout(bddy)="" transit="" ·=""> 2;2;TRANSIT · BODYATTRIBUTES2;2;</i-></i-></i->	C Use the contents of this file: i Browse Gallegy File name:	
Active Layout			
C None	Include custom HTML		
C Frameset Layout	C Use the following:		
C Table Layout			
· Cutton Laber Layour			
Components:	×	× 2	
		_	
	OK	Cancel Help	

Figure 5-2 Custom Table Layout page

- 3. Copy and paste your third-party source code into the **Use the following** text box or select **Use the contents of this file** and then browse to your third-party web page (stored on your file system or in Content Server).
- 4. Click **OK** to return to the main window.

If you add a reference page token to your custom HTML, you must also add the reference page to your publication. Otherwise, you will create an empty placeholder when you translate the publication.

Your custom HTML will be included in your publication when you translate, stage, and publish. If your custom HTML references another file (graphic, style sheet, etc.), then that file must be added as an associated file in order to be included in the project. (See Including Third-Party Content in Projects on page 5-115.)

If your custom table layout uses a scripting language (IDOC, ASP, SSI, or JSP), then the file extensions in the project output directories must match the scripting language. (See Modifying File Extensions in a Project on page 5-116.)

The custom table layout is applied to each document in the selected publication. To create a custom table layout for a specific document, first create a publication for that document, and then create a custom table layout for that publication.

Conflicts can occur when an included reference page retains promoted element anchor tags. You can avoid this by selecting Omit hyperlink targets for promoted elements in the Globals area of your templates.

Content Publisher provides two sample templates that can be used to generate dynamically included reference pages: DynamicTOC_iDoc.ttp (for Idoc Script) and DynamicTOC.ttp (for all other scripting languages), both located in the Support directory of the Content Publisher product disc. These specially formatted templates remove potentially problematic HTML tags in your dynamic includes.

In addition to the Custom Table Layout option, Content Publisher provides a Frameset and Table layout, each of which contains a design area, sample galleries, and more.

DIRECTORY ITEMS

This section covers the following topics:

- Adding a Directory Item (page 5-89)
- ✤ Adding a Directory Item From the File System (page 5-89)
- Adding a Directory Item From Content Server (page 5-91)
- Adding a Dynamic Directory Item From the File System or an FTP Site (page 5-93)
- Updating a Dynamic Directory Item (page 5-94)
- Sorting Directory Items (page 5-94)
- Directory Item Options (page 5-95)
- Query Results Hierarchy (page 5-96)
- Importing Folders From the File System Hierarchy (page 5-97)
- The Dynamic Directory Item Versus the Folder Import Wizard (page 5-98)

Adding a Directory Item

You can add a Directory Item from the following repositories:

- File system—See Adding a Directory Item From the File System (page 5-89)
- FTP site—See Adding a Directory Item From an FTP Site (page 5-10)
- HTTP site—See Adding a Directory Item From an HTTP Site (page 5-13)
- Content Server—See Adding a Directory Item From Content Server (page 5-91)

When using Site Builder standalone, the Directory Item command on the Add menu is grayed out and the Directory Item option in the Folder Import wizard is not available.

Adding a Directory Item From the File System

You can add a Directory Item to a project from different repositories, including the file system. (See Adding a Directory Item on page 5-89.) As a result, each time you run a translation, all files of the specified types in the directory at the time of translation are translated.

- 1. In the Publication Hierarchy pane, right-click the publication you want to add the Directory Item to and choose **Add Directory Item** from the popup menu.
- 2. In the Select a Repository dialog box, select **File System** from the drop-down list to open the New Directory Item Properties dialog box.
- 3. In the Directory text box, enter the path and name of the directory you want to add to the publication. Click **Browse**, if necessary, to locate the desired directory.
- 4. In the Title text box, enter a name for the directory.

This name can be used to create a title for your Web pages (see the Titles tab dialog in **Globals**). It will also appear on the title bar of the Properties dialog box once you exit the dialog box and then return to it again.

5. In the **Include files matching the following file specification** text box, enter file specifications for the types of files you want to translate. Separate multiple entries with semicolons. You can also use the wildcard to specify a partial file name.

Example 1 *.doc;*.123;*.wpd

Example 2 Sales*.doc (Site Builder will translate such files as SalesQ1.doc and SalesQ2.doc)

- 6. In the **Map file property** text box, enter any information you want to appear in the directory element in the XML Map file that Site Builder will generate when it translates the project.
- 7. In the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this Directory Item. See Adding a Prefix to Output File Names (page 8-79) for more information.
- 8. Under Output Directories, enter the paths and names of the directories you want to use for the translated files from this directory. You can use different directories for output pages and graphics files, and you can enter a directory that doesn't exist. (Site Builder will create the directory when it translates the files, assuming the directory can be created.)
- 9. Under Template, click **Choose Template**, to open the Choose Template dialog box. The Documents box in this dialog box lists all the documents currently in the selected directory that have the file specifications. A temporary translation of the first document on the list will display in the Preview window if the Auto button is checked. Pick the template you want to associate with the documents.

The default setting in Choose Template is None, which means that Site Builder will create a default set of ranks for the source documents. To import styles or patterns instead, select the appropriate option.

10. Click **OK** to return you to the New Directory Item Properties dialog box, and **OK** again to return to the main window.

The Contents pane now displays a single entry for the directory item you have just added to the publication. Only *.htm displays in the Output column. When Site Builder translates all files in this directory, it will name them after the original file names, except for the change in extension.

Once you have completed the basic setup of a directory in the General tab dialog, you can click the Sort tab dialog to refine the order in which items in the directory are to be translated. See Sorting Directory Items (page 5-94) for more information.

On the Options tab dialog, you can set conversion options for passing through documents (see Passing Through Source Documents Without Conversion on page 5-38) and changing the output file extension (see Setting Check-In File Extensions on page 8-82).

A Directory Item can be empty when you add it to your project. Site Builder will check the specified folder each time you translate the project. If the folder contains source documents with the specified extensions, those documents will be translated.

If you select Styles in the Choose Template dialog box, Site Builder will import styles only from those documents in the directory at the time the Directory Item is added. If you later add documents to the directory that contain new styles not in the template, you will have to import the new styles. To do so, right-click the Directory Item in the Contents pane and choose Import and then Styles from the popup menu.

Adding a Directory Item From Content Server

In Content Server, a Directory Item is defined by a query. Any source documents that meet the search criteria for the query are considered part of the Directory Item. You should use the Update Versions command to ensure that any source documents later added to Content Server that meet the search criteria are included in future translations.

- In the Publication Hierarchy pane, select the publication you want to add the Directory Item to, and click **Directory Item** on the Add menu to open the New Directory Item Properties dialog box. (If necessary, select **Content Server** from the drop-down list and click **OK**.)
- Click Browse opposite the Directory field to open the Directory Item Properties dialog box. Then click the Content Server button to open the Choose a Content Server dialog box, and select a content server from the drop-down list. (If only one content server is configured on your machine, it will be selected already.) Click OK to return to the New Directory Item Properties dialog box.
- 3. Under Directory Item Information, provide a name for the Directory Item. (This name will be added to the content server name and will display in the Contents pane. By naming Directory Items, you will be able to differentiate between multiple Directory Items that are added to the same publication of your project and drawn from the same content server.)
- 4. Select **Restricted** from the Type drop-down list (since it's the default setting, it should be selected already).
- 5. In the **Maximum document count** box, enter the maximum number of source documents you want to include in the Directory Item in Content Publisher.

If you leave this blank, the number of documents returned will equal the number of documents returned as a result of the query in Content Server, up to the query result limit imposed by Content Server. The default limit in Content Server is 200.

Example: If you set up a query in Content Server using the default of 200 and set the Maximum document count in Site Builder to 40, you will only receive 40 files or fewer, depending upon the query results. If, instead, you set the document count in

Site Builder to 250, you will only receive 200 files or fewer depending upon the query results, because that is the limit set in the content server.

The Sort selections you make influence your results. See Sorting Directory Items (page 5-94) for more information.

- 6. From the Content Rendition drop-down list, select Alternate or Web if you prefer to add source documents to your project in other than their native format. Alternate is the alternative format, if any, that you provided the source document in when you added it to the content server. Web is the browser-ready version of your native file. Since this will be PDF in most cases, the Web option can be particularly useful for adding PDF files to your project.
- 7. Click the Query button to open the Specify a Search dialog box in Content Server. Set your search parameters and click the Search button. Review the list of current hits resulting from the query to be sure that your Directory Item will capture all the documents you want to capture and no additional ones. To refine the query, click the Back button and set new search parameters. If the list of documents is satisfactory, click the Add Query to Project button to return to the Directory Item Properties dialog box.

To create a folder hierarchy based on the metadata assigned to your content items, click **Hierarchy** (see Query Results Hierarchy on page 5-96).

- 8. Click **OK** to return to the New Directory Item Properties dialog box, where the Directory field will read \\<content server>\<query name> .
- 9. In the **Title** text box, enter a title for the Directory Item. (You don't have to enter one. If you do, it can be used to populate titles of your output pages.)
- 10. Under Map File Property, you can enter text to specify a custom item that will be added to the output Map file (MapFile.xml). This could enable you, for example, to place security information in the Map file.
- 11. In the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this Directory Item. If publishing to Content Server, ensure that the file name, including all prefixes, is no more than 30 characters. See Adding a Prefix to Output File Names (page 8-79) for more information.
- 12. Under Output Directories, specify directories for output pages and graphics. Click **Browse**, if necessary, to locate the directories you want to use.

You don't have to enter anything. By default, Site Builder uses the full path specified for the root publication and mirrors the publication hierarchy in the structure of the

output directories it creates. So you may want to simply enter just the names for the output directories you want to use.

13. Under Template, click Choose Template to open the Choose template dialog box. Select the template you want to associate with the source documents in the Directory Item, and click OK. Click OK again, to return to the main window.

When you created a restricted Directory Item, you must select Restricted (step 4) before you create the query (step 6).

To edit the query for a Directory Item at any time, click the Info button on the Directory Item Properties dialog box to open the Details dialog box, and then click Modify. See Criteria of a Directory Item in Content Server (page 5-30) for more information.

On the Options tab dialog, you can set conversion options for passing through documents (see Passing Through Source Documents Without Conversion on page 5-38) and changing the output file extension (see Setting Check-In File Extensions on page 8-82) during check-in to the content server.

Adding a Dynamic Directory Item From the File System or an FTP Site

When you add a Directory Item from the file system or an FTP Site, you can turn it into a dynamic Directory Item by selecting the Include Subfolders option, which is turned off by default.

With the default setting, you add a Directory Item and therefore only the individual source documents of the specified folder. When you select Include Subfolders, Site Builder not only imports the specified folder, but also the complete hierarchy of folders below that folder. It automatically processes source documents in all of the folders.

- 1. In the New Directory Item Properties dialog box, once you have specified the Directory Item and selected a template, click **Options** to open that tab dialog.
- 2. Under Dynamic, select Include subfolders.
- 3. Click **OK** to return to the main window.

The dynamic Directory Item and the Folder Import wizard both can be used to add source documents to a publication. For a comparison of the two methods, see The Dynamic Directory Item Versus the Folder Import Wizard (page 5-98).

Updating a Dynamic Directory Item

When your project contains dynamic Directory Items, you must use the Update Versions Command (page 8-9) to update the project before translation. That's because Site Builder not only checks for the newest version of each source document, but also for any structural change in the dynamic Directory Item.

If you have added a new folder to a dynamic Directory Item since the last time you translated, Site Builder will recognize this and include the new folder in the next translation.

- 1. Click **Update Versions** on standard toolbar (4) or on the **Run** menu.
- 2. If the Update Versions dialog box opens, click OK.

See Update Versions Command (page 8-9) for more information on this dialog box and how to automate the updating process in Site Builder.

When you schedule projects to run on Site Server, all source documents and Directory Items are automatically updated, because Site Server can execute four commands— Update Versions, Translate, Stage, and Publish—automatically.

Sorting Directory Items

When you add a Directory Item to a publication, you can determine the sort order of the documents in that directory when they are translated. The order is important because it will determine how the output files are linked and the order in which the Web pages you create can be browsed onscreen.

See Adding a Directory Item From the File System (page 5-89) for information on setting up a Directory Item.

- 1. If you previously specified a Directory Item, right-click the directory Item in the Contents pane and choose **Properties** from the popup menu.
- 2. In the Directory Item Properties dialog box, click Sort to switch to that tab dialog.
- 3. If you are setting sort options for a Directory Item added from Content Server, you may want to select **Do not sort this Directory Item**. When selected, the sort order that is specified for the query in the content server will be used in Site Builder.
- 4. Under Sort Order, select **Ascending** or **Descending** according to how the documents will be sorted.
- 5. Under Sort By, select the file attribute you want to sort by.

6. Click **OK** to return to the main screen.

Ascending means that documents will be linked from A to Z (if you sort by document name), smallest to largest (by document size), and oldest to newest (by date and time). Descending means the opposite.

When you add a Directory Item from Content Server, the documents that are returned by the query will be those listed first according to the Sort selection you made in Content Server, and then by the Sort selection set here.

If you are adding a Directory Item from Content Server and you want to set sort options in the content server and Site Builder differently, such as sorting the query in ascending order and the Directory Item in descending order, you can do so if you prefer.

Directory Item Options

When you create a Directory Item, you can set options that determine how Site Builder translates documents in the selected Directory Item.

Conversion Options—To pass through documents in their native format, using their original file name and extension.

To select the pass-through conversion option, select **Pass through files matching the following specification**. In the **File specification criteria** text box, enter the specifications for the types of files included in the Directory Item that you want to pass through without modification during translation, such as ***.avi;*.pdf**. Separate entries with semicolons. Select the output location for passed-through files. See Passing Through Source Documents Without Conversion (page 5-38) for more information.

Output page extension—to set the extension for all translated output generated from source documents in this directory. The default extension is .htm.

To change the extension, enter the new extension in the Output page extension text box. To change the default at the project level (for example, to **.html**), see the Application Options dialog box, from the **View** menu. When you change this extension, the new extension applies only to new saved documents added to the project after the change is made.

 File naming—to change output file names for those source documents drawn from the content server (as defined by the Query you create for the Directory Item). You can specify a unique identifier (custom metadata) to be used for the output file names. You can also choose to strip the file extension from the original file name at the same time. Dynamic—to create a Dynamic Directory Item, which means that Site Builder imports not only the specified folder but also the complete hierarchy of folders below that folder. It automatically processes source documents in all of the folders.

To specify a directory item as dynamic, select **Include Subdirectories**. This option is available only when adding a directory item from the file system or from an FTP site. See Adding a Dynamic Directory Item From the File System or an FTP Site (page 5-93) for more information.

Query Results Hierarchy

A Directory Item in Content Server is defined by a query. Any source documents that meet the search criteria for the query are considered part of the Directory Item. When you translate and publish your project, the entire contents of the Directory Item are placed in one folder, thus creating a flat hierarchy.

You can, however, create a dynamic Directory Item whereby the metadata assigned to source documents in Content Server is used to create a folder hierarchy in your published output. You can then base your reference pages and site navigation off of this hierarchy.

- 1. Follow the steps to add a Directory Item from Content Server (see Adding a Directory Item from Content Server on page 5-18).
- 2. On the Directory Item Properties dialog, click the **Hierarchy** button.
- 3. Select the metadata values that you would like to use in your folder hierarchy by checking the **Field Caption** next to your metadata field names.
- To set the order of the fields, highlight the appropriate Field Caption and click Move Up or Move Down. The order of the fields will determine which metadata value produces a top level folder, a second level folder, a third level folder, and so on.
- 5. Click **OK** to close the Query Results Hierarchy dialog, and click **OK** again to close the Directory Item Properties dialog.
- In the General tab dialog of the New Directory Item Properties dialog box, click the Choose Template button to choose a template for the Directory Item, if you haven't done so already.
- 7. Then click the **Options** tab, and under Dynamic, select **Include subfolders**. (This option must be enabled to create the folder hierarchy.)
- 8. Click **OK** to return to the main window. (If you haven't already chosen a template for your Directory Item, you will be prompted to do so and should return to the General tab dialog and click **Choose Template.**)

A query results hierarchy uses the metadata assigned to source documents in Content Server to create a folder hierarchy. The metadata values (Field Names) that are selected in the Query Results Hierarchy dialog will become the folders and subfolders. The order of the metadata values in the Query Results Hierarchy dialog will determine the folder level. And lastly, the order of the query results will determine the order of output folders and files, with output folders coming before output files.

If a source document does not have a metadata value for a given field in the query results hierarchy, that source document will be placed in the parent folder. (This rule applies even if a source document is missing one metadata value but meets another metadata value in the query.) Also, if a source document does not have any of the metadata values specified, it will be placed in the root of the Directory Item hierarchy.

To control the order of items in your directory reference pages, use the Sort feature on the Properties dialog (see Sorting Directory Items on page 5-94).

The Query Results Hierarchy feature is designed for users who are creating Directory Items in Content Server and publishing to a hierarchical repository, such as a file system or FTP.

The query results hierarchy reads a fixed list of metadata—it does not create a hierarchy that deepens over time. If you add new metadata values in Content Server, then you need to update your Directory Item query to include those values. If you create new metadata that is used only to organize your hierarchy and does not affect the Directory Item query, then you need to update your Directory Item by selecting the new metadata in the Query Results Hierarchy dialog.

Importing Folders From the File System Hierarchy

In addition to adding individual documents, reference pages, publications, and Directory Items to your publication, you can use the Folder Import wizard to create a publication hierarchy from an existing hierarchy in your file system. As a result, you can create multiple new publications for your project from the folders in the file system hierarchy. You can either treat the folders as Directory Items or add the documents in the folders to your project.

Use this process to start the Folder Import wizard:

- 1. From the File menu, choose Import to open the Folder Import wizard
- 2. Follow the instructions on the wizard screens.

When you select a root folder, you are selecting that folder and everything in it. Site Builder will create a Directory Item for the root folder itself (even if it is empty), as well as for all the other folders it contains. But you won't see the name of the root folder in the publication hierarchy of your project.

The Folder Import wizard and the dynamic Directory Item both can be used to add source documents to a publication. For a comparison of the two methods, see The Dynamic Directory Item Versus the Folder Import Wizard (page 5-98).

Whether you import the folders as Directory Items or import the documents in the folders, you can use wildcards to specify which file formats to be imported. For example, if you want to import all .doc and all .txt files, you would enter ***.doc;*.txt** (with the semicolon as a separator) in the wizard screen.

The Dynamic Directory Item Versus the Folder Import Wizard

When adding source documents from the file system, it's worth comparing the dynamic Directory Item to the Folder Import wizard. Both the dynamic Directory Item and the Folder Import wizard can import a portion of a hierarchy from the file system. The important differences are listed below:

The Dynamic Directory Item

- Only the parent Directory Item is visible in the Contents pane. Site Builder creates a hidden subpublication for the subfolders of the parent Directory Item. The subpublication inherits the properties of the publication in which the dynamic Directory Item resides.
- If you create a TOC for the parent Directory Item, you are, in effect, creating a TOC for each subfolder—and the contents of the subfolders are promoted so that the TOC for the parent Directory Item summarizes the complete hierarchy of the dynamic Directory Item.
- 3. Promotion and linking specified in the template for the TOC of the parent Directory Item apply to all subfolders. Likewise, any reference pages you assign to the parent Directory Item (as well as any files associated with the parent) are automatically inherited by the subfolders, too.
- 4. Site Builder includes in translation any new subfolders added to the hierarchy in the future. This can be handled automatically. (See Updating a Dynamic Directory Item (page 5-94).)

The Folder Import Wizard

- 1. When you select a root folder, you are selecting that folder and everything within it. Site Builder will create a Directory Item for the root folder itself (even if it is empty), as well as for all the other folders it contains. But you won't see the name of the root folder in the publication hierarchy of your project.
- 2. You must associate the same template with all folders and source documents. If you import the folders as Directory Items, you can choose a different template for each Directory Item later, if you want, in the Choose Template dialog box. Likewise, if you import the documents in the folders, you can (after the initial importation) associate any template with any document.

ASSOCIATING A FILE WITH A PUBLICATION

During translation, Site Builder generates output files for your body pages and for any graphics embedded or referenced in your source documents. It makes copies of all graphics from the Gallery used for navigation and places these in the output directories, too. But it does not recognize "associated files" that may be an integral part of your project.

Say you reference a file for the content of a specific frame and the referenced file, in turn, references a graphics file. The graphics file would not be recognized by Site Builder. So the behavior or content of your Web publication would be affected in some way.

You can associate such files with a project to ensure that Site Builder recognizes them during translation and places copies of the files in the appropriate output directories. You do this at the publication level.

- 1. In the Publication Hierarchy pane, select the publication for which you want to create an associated files list.
- 2. Click Associated Files (1) on the toolbar to open that dialog box.
- 3. To add an associated file to the list, click the Add button.
- 4. In the Open dialog box, locate the file you want to add to the list, select the file, and click **OK**. The file appears in the Associated Files list. To place it another output directory, double-click the red cross in the Graphics or Gallery Graphics column opposite the file name or select the appropriate radio button under Output Directory.
- 5. Click the **Add** button to add another file to the list, if you want. You can add multiple files at the same time if they are in the same folder.

- 6. To change the output file name of an associated file, select the file in the Associated File list. Its default output file name displays in the Output File Name text box. Enter the name of the output file name you want to use.
- 7. Click OK.

The output directories for the Associated Files list are set in the Publication Properties dialog box. For Pages and Graphics they can be set for each publication. The output directory for Gallery Graphics can be set only for the root publication (see Gallery Graphics Output Directory on page 5-102).

If you do not specify an output directory for Gallery Graphics, any associated files specified to appear in that directory will appear in the Graphics output directory instead.

For output pages and other graphics, the default directories for subpublications mirror the publication hierarchy, based on the path specified for the root publication.

You can also set documents and Directory Items to act essentially the same as associated files by setting a pass-through conversion option for those items. See About Pass-Through Conversion (page 5-37) for more information.

OUTPUT FILES AND DIRECTORIES

This section covers the following topics:

- Case Sensitivity of Output File Names (page 5-101)
- Designating Output Directories (page 5-101)
- Gallery Graphics Output Directory (page 5-102)
- Output HTML Pages (page 5-102)
- File Conflicts Notice (page 5-103)
- Output Page Names (page 5-105)
- Output Directories on page 5-105
- Specifying the Extension for Output Files (page 5-106)
- Complying With ISO 9660 (page 5-107)
- Output Character Sets (page 5-108)
- Selecting an Output Character Set for a Document (page 5-108)
- HTML Generation (page 5-109)

Case Sensitivity of Output File Names

Site Builder is case sensitive regarding output file names, directories, and HTML links. In a Windows environment this typically isn't an issue, but you may plan to move your output to a Unix-based Web server. If so, pay careful attention to case sensitivity when you set up your publication, because such servers are case sensitive.

Designating Output Directories

Site Builder automatically designates a default directory for the output pages you create and the graphics converted during translation. The default is a property of the root publication and is applied to all source documents and reference pages in the root publication as well as to the contents of any subpublications.

You can set a different output directory for each publication in your project, and even different directories for source documents. The output directories can be anywhere on the network that is accessible from your workstation. Site Builder will create the directories if none exist.

- 1. In the Publication Hierarchy pane, right-click the root publication and choose **Properties** from the popup menu to open the Publication Properties dialog box.
- 2. Under Output Directories, enter a new path for the Pages output directory. Do the same for the Graphics directory if you want to use a separate output directory for graphics. Use the Browse button, if necessary, to locate the directories you want to use.
- 3. Click **Use gallery graphics directory** if you want to designate a special directory for Gallery graphics. Then specify the path and name of the directory.

This directory will be used for all graphics from the Gallery used in the project. In this way, you will avoid generating duplicate graphics in your output.

- 4. Click OK.
- 5. For any other publication in the Publication Hierarchy pane, open the Publication Properties dialog box and repeat step 2. (You can designate a gallery graphics directory only for the root publication.)
- 6. To designate an output directory for a source document, right-click the source document in the Contents pane and choose Properties from the popup menu. Then repeat step 2 in the Document Properties dialog box.

If you designate an output directory only for the root publication, Site Builder will mirror the publication hierarchy in the output directories it creates for subpublications. So if the output directory for your root publication is \\Application Data\Output and your root publication contains the subpublications Marketing and Finance, Site Builder will create the subdirectories \\Application Data\Output\Marketing and \\Application Data\Output\Finance, unless you specify otherwise

See Output Directories (page 5-105) for more information.

Gallery Graphics Output Directory

You can create an output directory for all graphics from the Gallery used in your Web publication. This way, you can eliminate the need for duplicate graphics if you are using a hierarchy of output directories for output files. For example, with such a directory you would need only one set of the graphics for the navigation buttons that are used throughout your Web publication.

Because the Graphics Gallery is for the project as a whole, you create it in the root publication, in the Properties dialog box.

- 1. Right-click the root publication and choose **Properties** from the popup menu. (You can also choose **Proper ties** from the Publication menu.)
- 2. Click the Use gallery graphics directory check box.
- 3. Enter the path and name of the directory to be used for gallery graphics. Or click **Browse** to locate the directory you want to use.
- 4. Click **OK** to return to the main window.

You can assign any associated file to the Gallery Graphics output directory, no matter its type. If you will only need one copy of an associated file for your project, you should place it in the Gallery Graphics output directory.

Output HTML Pages

If you delete a source document from a project, the history file will also be updated but the output HTML file from the last translation will not be removed. It is recommended that you delete all files from your output directories before carrying out your final translation.

File Conflicts Notice

The File Conflicts Notice dialog box appears when you are about to translate a publication and one or more of the output files you are about to create will overwrite existing files in your output directory or may conflict with other output files about to be created.

This may happen if the same source documents are included in different publications, if multiple source documents have the same output filename, or if you are using one of the default titles for a reference page (Table of Contents.htm is a common output file).



Note: This notice won't appear if you are repeatedly translating a document and overwriting files created for the same document. Site Builder recognizes when a file was previously created for another document and issues the warning only then.

When a File Conflicts Notice appears, either:

- Click OK if you don't mind overwriting the files specified in the File Conflicts Notice dialog box, or
- Click Cancel if you don't want to overwrite the specified files.

If you click Cancel, do the following:

Change the output page name of the file or files in your current publication that are in danger of replacing other files with the same names. Once you have done this, you are ready to translate the current publication.

It is recommended that you translate when the project is free of any conflicts. You can avoid the File Conflicts Notice by using unique output directories and file names for all publications.

If you publish to Content Server, you may want to add a prefix to file names (see Adding a Prefix to Output File Names on page 8-79) and publish using the original file name (see Publishing to the Content Server Without a Unique Suffix on page 8-81) to ensure that your file names are unique in the content server. This also helps you create predictable file names. If you know that you will publish "pub1_salesfigures.hcsp" into the content server, you can plan for it, and link to that file more easily than you would if the timestamp and unique suffix is added to the file while it is published.

About the File Conflicts Notice

The File Conflicts Notice dialog initially displays all of the items in your project in the left-hand pane, and all of the conflicts that Site Builder noted prior to translation in the right-hand pane. You can change the default display options if you wish:

Show Conflicting Items Only: Select this box when you want to view only conflicting items, not all of the items contained in the project. Clear the box to view every item contained in the project, regardless of whether or not it represents a conflict.

Filter Possible Duplicates: Select this box to omit possible duplicate conflict notices from the File Conflicts Notice dialog. Clear the box to view every conflict found, regardless of whether or not it may be a duplicate entry.

You can navigate through the File Conflicts Notice in one of two different ways to see which conflicts are associated with which items:

- Select an item in the left-hand pane to view conflicts that are associated with that item in the right-hand pane. If no conflicts are associated with the item, nothing displays in the right-hand pane. If you select a project, you will see every conflict associated with that project; if you select a subpublication, you will see every conflict associated with that subpublication, and if you select an individual item, you will see every conflict associated with that item. (Note that if you select **Filter Possible Duplicates**, you may not see every conflict, because possible duplicate messages do not display.)
- Select a conflict message in the right-hand pane to identify which items are associated with that conflict, as shown below, where the "Other Issues" items are associated with the highlighted conflict notice.

A blue ! displays next to the items that are associated with the conflict message that is highlighted on the right. The entire conflict message displays in the bottom window of the File Conflicts Notice so that you can easily read the full text of the message.

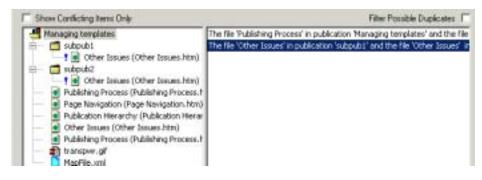


Figure 5-3 Conflict message

Output Page Names

When Site Builder translates a source document, it uses the name of the source document for the output page, changing the extension to **htm**. So if you add Tutor.doc to your publication, Site Builder will display Tutor.htm in the Contents pane to denote the proposed name of the output file upon translation.

- 1. Click Project Options on the View menu to open that dialog box.
- 2. Click **Repositories** to open that tab dialog.
- 3. Under Output Page Naming, select either **Replace name with source ID** or **Add source ID to name**.
- 4. Click OK.

This setting is project-specific and is therefore saved to the project file. The setting will apply whether you run the project locally, move it to a network location, or schedule it for translation by Site Server.

Since the output page name is a property of the document, you can change the name to anything you want, in the Document Properties dialog box. You can also change the extension. See Specifying the Extension for Output Files (page 5-106).

If you split a source document into several smaller files, Site Builder modifies the output file name to create multiple file names. If the output file name initially is Tutor.htm, Site Builder will probably create multiple files with the names Tutor-01.htm, Tutor-02.htm, etc. You cannot control the naming of files when you split a document. The actual names will depend on the number of characters in the output file name and how many files you create. It will also depend on the existence of other similarly named files.

Output Directories

Site Builder automatically designates a default directory for the output pages you create and the graphics converted during translation. The default is a property of the root publication and is applied to all source documents and reference pages in the root publication as well as to the contents of any subpublications.

The default output directory is:

C:\Documents and Settings\<username>\My Documents\Stellent\Output

 You designate output directories in the Publication and Document Properties dialog boxes. You can set a different output directory for each publication in your project, and even different directories for source documents. You can use any output directories on the network that are accessible from your workstation. See Designating Output Directories (page 5-101).

- If you designate an output directory only for the root publication, Site Builder will mirror the publication hierarchy in the output directories it creates for subpublications. So if the output directory for your root publication is \\Application Data\Output and your root publication contains the subpublications Marketing and Finance, Site Builder will create the directories \\Application Data\Output\Marketing and \\Application Data\Output\Finance for the output for those subpublications, unless you specify otherwise.
- You can use a single output directory for all output files or use two or three separate output directories instead. The Pages output directory is designed for body pages (which Site Builder creates from source documents), and the Graphics output directory is designed for graphics files (which Site Builder creates when it converts or passes through graphics in the source documents).
- Gallery Graphics is a special output directory that can be set only for the root publication. It is designed to avoid duplication in graphics for navigation buttons in a project where multiple output subdirectories are created. The Gallery Graphics output directory can, in fact, be used for files of any kind, whether or not they are graphics, to avoid creating duplicate copies.

All output body and reference pages have an HTM extension. Any converted graphics files will have one of three extensions, depending on which format you choose: GIF (.gif), JPEG (.jpg), or PNG (.png).

You can change the default .htm extension for output pages to .html, if you want. See Output Page Names (page 5-105).

Specifying the Extension for Output Files

By default, Site Builder applies the **htm** extension to all output files it creates from source documents. You can use **html**, if you prefer. (You may also want to use **xml** if you are generating XML-compliant output.)

- 1. Choose Application Options from the View menu.
- 2. Click General to open that tab.
- 3. Under Default Output Extension, select htm and type over html.
- 4. Click OK.

This setting is user-specific on a given machine. It applies to all projects run on the machine by the user logged in at the time of the change.

The extension you have specified will be used only for new source documents added to the project after the change is made.

You can also set documents and Directory Items to be passed through during conversion in their original format, using their original file name and extension. See About Pass-Through Conversion (page 5-37) for more information.

Complying With ISO 9660

If you distribute publications on CD-ROM, your file naming conventions should comply with ISO 9660, which requires that all file names:

- contain a maximum of 8 characters, followed by a dot, and then by a maximum of 3 characters for the extension (the file name or the extension may be empty, but not both).
- use only letters, numbers, and underscores (no hyphens, tildes, equals signs, or pluses)
- use only upper case for the letters

To comply with ISO 9660:

- 1. Click Project Options on the View menu to open that dialog box.
- 2. In the General tab dialog, under File Names, click **Use ISO 9660 compliant file names**.
- 3. Click **OK** to return to the main window.

For all future translations, Site Builder will produce ISO 9660-compliant file names.

This setting is project-specific and is therefore saved to the project file. The setting selected will apply whether you run the project locally, move it to a network location, or schedule it for translation by Content Server.

If you know that your output HTML and graphics files must follow the 8.3 convention, you should carefully consider the naming of all source documents and externally linked graphics files to begin with. Starting out with short file names will help you avoid problems that may arise when longer names are truncated.

Site Builder sometimes modifies the original file name. For example, if you split a source document on a particular element, Site Builder will modify the file name to accommodate the necessary numbering needed to create multiple output files.

Site Builder will not force ISO-compliant directory names, so you must be sure to name directories properly.

Output Character Sets

Output Character Set is a setting in the Project Options dialog box where you can choose the character set to be used by Site Builder in creating your output pages. The default setting is Western (ISO-8859-1).

To select an output character set

- 1. Click **Project Options** on the View menu to open that dialog box.
- 2. In the General tab dialog, under Output Character Set, select an output character set from the drop-down list.
- 3. Click OK.

This setting is project-specific and is therefore saved to the project file. The setting will apply whether you run the project locally, move it to a network location, or schedule it for translation by Site Server.

Unicode, which is supported by HTML 4.0, offers the broadest range of characters for all browsers, except older ones (version 2.0 and earlier).

This setting should be used in conjunction with HTML Generation, also in the Project Options dialog box. (See HTML Generation on page 5-109.)

Selecting an Output Character Set for a Document

Output Character Set is a setting in the Project Options dialog box where you can choose the character set to be used for output pages. The default setting is Western (ISO-8859-1).

You can select an output character set for a single document, if you want.

- 1. Right-click the document in the Contents pane and choose **Properties** from the popup menu.
- 2. Click **Options** to switch to that tab dialog.
- 3. Under Output Character Set, select an output character set from the drop-down list.
- 4. Click OK.

This setting is specific to the selected document and will override the character set selected for the project.

Unicode, which is supported by HTML 4.0, offers the broadest range of characters for all browsers, except older ones (version 2.0 and earlier).

HTML Generation

HTML Generation is a setting in the Project Options dialog box where you can choose between the Standard HTML (Latin 1) and Windows-specific characters. The **Allow Windows-specific characters** options lets you use a richer character set, but should be used only if your users will be able to display these characters in their browsers. This won't be possible, for example, with Unix browsers.

- 1. Click **Project Options** on the View menu to open that dialog box.
- 2. Under HTML generation, select the appropriate option for your Web publication.
- 3. Click OK.

This setting is project-specific and is therefore saved to the project file. The setting will apply whether you run the project locally, move it to a network location, or schedule it for translation by Site Server.

This setting should be used in conjunction with Output Character Set option, also in the Project Options dialog box. (See Output Character Sets on page 5-108.)

INTEGRATING THIRD-PARTY APPLICATIONS

This section covers the following topics:

- Integrating Third-Party Applications With Content Publisher (page 5-110)
- About Tokens (page 5-110)
- Using Layout Tokens (page 5-110)
- Layout Token Syntax (page 5-111)
- Dynamic Include Token Syntax (page 5-112)
- Template Tokens (page 5-114)
- Including Third-Party Content in Projects (page 5-115)
- Modifying File Extensions in a Project (page 5-116)

Integrating Third-Party Applications With Content Publisher

You can use a third-party web site development tool in tandem with Content Publisher to create highly dynamic web pages for enterprise-level web sites. Third-party applications can be used with the Custom Table Layout feature in Content Publisher.

About Tokens

Third-party applications can take advantage of the tokens in Content Publisher. A token is a snippet of code that serves as a placeholder for web content. Content Publisher offers a library of tokens that you can choose from when creating web pages.

A token represents content in another part of your web publication. As such, you can use one in place of a hyperlink target or directory path statement.

When you publish a project to a web server or content server, your web pages will continue to work even when source content (represented by the token) changes.

Using Layout Tokens

A third-party web development application can be used with Content Publisher.

Tokens can be used to include content in your web page either dynamically or statically: a dynamic include is for reference page content (TOC, Index, LOF, LOT), and a static include is for body page content. In a dynamic include, the token is replaced with a path to the file (that the token represents) when the page is served by a web server. In a static include, the token is replaced with the contents of the file (that the token represents) when a project is translated.

A dynamic include requires a scripting language to support the include action, and each scripting language uses a different syntax with the token. You have four scripting languages to choose from: Idoc Script (Idoc), Active Server Pages (ASP), Server Side Includes (SSI), and JavaServer Pages (JSP).

The body page is different from reference pages in that it can only be included statically. As a static include, no scripting syntax is required. The body token by itself can be placed in your source code:

<!-- TRANSIT - CUSTOMLAYOUT(BODY) -->

A query reference page is added and defined in Content Publisher; as a result, it displays as a static body page.

Please note the following:

- 1. If you add a reference page in the HTML source code of a third-party application, you must also add the reference page to your publication.
- 2. The scripting language you choose must follow the appropriate syntax required for that scripting language.
- 3. The file extensions in the project output directories need to match your chosen scripting language.
- 4. Dynamic includes are assembled by the web server when the web page is viewed in a browser. As such, you cannot preview your dynamic includes on a local file system.

Layout Token Syntax

Third-party applications can take advantage of the following tokens in Content Publisher.

Template Tokens

In addition to the reference page and body page content that you add to your third-party source code, you should insert template tokens for added functionality in Content Publisher. These tokens are replaced with template settings (top, head, and body attributes) that you make in Content Publisher.

TOP (Before <HTML> tag) <!-- TRANSIT - CUSTOMLAYOUT(TOP) --> HEAD (Between <HEAD> tags)

<!-- TRANSIT - CUSTOMLAYOUT(HEAD) -->

BODY (Included in <BODY> tag) %%TRANSIT-BODYATTRIBUTES%%

Dynamically Included Reference Pages

The following tokens will dynamically include the path to a reference page file in place of the token. The dynamic tokens require a scripting language (Idoc, ASP, SSI, or JSP) to perform the include action. (See Dynamic Include Token Syntax on page 5-112.)

TOC (Table of Contents) %%TRANSIT-PATH(TOC)%%

LOT (List of Tables)

%%TRANSIT-PATH(LOT)%%

INDEX

%%TRANSIT-PATH(INDEX)%%

LOF (List of Figures)

%%TRANSIT-PATH(LOF)%%

Statically Included Reference Pages

The following tokens will statically include the contents of a reference page in place of the token. The static tokens do not require a scripting language to perform the include action.

TOC (Table of Contents)

```
<!-- TRANSIT - LAYOUT(TOC) -->
```

```
LOT (List of Tables)
```

```
<!-- TRANSIT - LAYOUT(LOT) -->
```

```
INDEX
```

```
<!-- TRANSIT - LAYOUT(INDEX) -->
```

LOF (List of Figures)

<!-- TRANSIT - LAYOUT(LOF) -->

Statically Included Body Page

The body page token is a static include that contains no scripting syntax. The body token represents source documents in a project. If you add multiple body page tokens, only the first one will work.

BODY

```
<!-- TRANSIT - CUSTOMLAYOUT(BODY) -->
```

All tokens and their parameters are case sensitive.

Dynamic Include Token Syntax

Third-party applications can take advantage of the tokens in Content Publisher. Following is a summary of how the the tokens can be used with different scripting syntax.

Idoc Script

Idoc Script is a proprietary scripting language for use with Content Server. Idoc Script uses the following syntax for each token:

TOC (Table of Contents)

<!--TOC--><!--\$docLoadResourceIncludes("RevisionSelectionMethod=Latest&dDocName=" & docRootFilename("%%TRANSIT-PATH(TOC)%%")), inc("TRANSIT_TOC_RESOURCE")-->

LOF (List of Figures)

<!--LOF--><!--\$docLoadResourceIncludes("RevisionSelectionMethod=Latest&dDocName=" & docRootFilename("%%TRANSIT-PATH(LOF)%%")), inc("TRANSIT_LOF_RESOURCE")-->

INDEX

<!--INDEX--><!--\$docLoadResourceIncludes("RevisionSelectionMethod=Latest&dDocName=" & docRootFilename("%%TRANSIT-PATH(INDEX)%%")), inc("TRANSIT_INDEX_RESOURCE")-->

LOT (List of Tables)

```
<!--LOT--><!--$docLoadResourceIncludes(
"RevisionSelectionMethod=Latest&dDocName=" & docRootFilename("%%TRANSIT-
PATH(LOT)%%") ), inc("TRANSIT_LOT_RESOURCE")-->
```

ASP/SSI

Active Server Pages (ASP) and Server Side Includes (SSI) use the same scripting syntax for each token:

TOC (Table of Contents)

<!--#include file="%%TRANSIT-PATH(TOC)%%"-->

LOF (List of Figures)

<!--#include file="%%TRANSIT-PATH(LOF)%%"-->

INDEX

<!--#include file="%%TRANSIT-PATH(INDEX)%%"-->

LOT (List of Tables)

<!--#include file="%%TRANSIT-PATH(LOT)%%"-->

JSP

JavaServer Pages (JSP) use the following syntax for each token:

TOC (Table of Contents)

```
<%@ include file="%%TRANSIT-PATH(TOC)%%" %>
```

LOF (List of Figures)

<%@ include file="%%TRANSIT-PATH(LOF)%%" %>

INDEX

```
<%@ include file="%%TRANSIT-PATH(INDEX)%%" %>
```

LOT (List of Tables)

<%@ include file="%%TRANSIT-PATH(LOT)%%" %>

Please note the following:

- 1. All tokens and their parameters are case sensitive.
- 2. The body page token is a static include. As a result, no scripting syntax is necessary, and the body token by itself can be placed in your source code:

<!-- TRANSIT - CUSTOMLAYOUT(BODY) -->

Template Tokens

In addition to the reference page and body page content that you add to your third-party source code, you should insert template tokens for added functionality in Content Publisher. These tokens are summarized in layout token syntax.

These template tokens are placed in your HTML code as follows:

```
<!-- TRANSIT - CUSTOMLAYOUT(TOP) -->
<html>
<head>
<!-- TRANSIT - CUSTOMLAYOUT(HEAD) -->
</head>
<body %%TRANSIT-BODYATTRIBUTES%%>
</body>
</html>
```

By inserting template tokens into your web page, you can modify your web site using templates rather than changing each web page in your publication.

For example, you may decide to add custom HTML or script to the body tag of a template. As long as you add the Body Attributes template token to your custom table layout in your third-party application, then the modified template body tag will be placed in each web page on your web site. As a result, the templates and the custom table layout are tightly linked and scalable for future changes.

The body page token, <!-- TRANSIT - CUSTOMLAYOUT(BODY) -->, contains template information as well, and must be included in your HTML code (where source content should appear).

Including Third-Party Content in Projects

The custom HTML and script you create in a third-party application can be made available to the project you are designing a custom table layout for.

However, any file that is referenced by your custom HTML, such as graphics, templates, style sheets, etc., will not be automatically included. You will need to add these items as associated files in Content Publisher. (Associated files are added at the publication level in a project.)

- 1. With your project open in Content Publisher, select the publication for which you want to add an associated file.
- 2. Click Associated Files (👔) on the toolbar to open the Associated File dialog box.
- 3. Click the Add button to add an associated file.
- 4. In the Open dialog box, locate the file you want to add to the list, select the file, and click **OK**. The file appears in the Associated Files list. To change the output directory location for this file, double-click the red cross in the Graphics or Gallery Graphics column or select the appropriate radio button under Output Directory.
- 5. Repeat this process for each file. (You can add multiple files at once if they are stored in the same directory.)
- 6. To change the output file name of an associated file, select the file in the Associated File list and modify its name beneath the Output File Name text box.
- 7. Click OK.

As an alternative to associated files, you can create a Directory Item for your included third-party content and then assign a pass-through value to the Directory Item so that content is preserved in its original format.

The output directories for the Associated Files list are set in the publication properties dialog box. For Pages and Graphics, they can be set for each publication. The output directory for Gallery Graphics can be set only at the root publication.

If you do not specify an output directory for Gallery Graphics (as specified in the publication properties dialog), any associated file specified to appear in that directory will appear in the Graphics output directory instead.

Modifying File Extensions in a Project

By default, Content Publisher applies the .htm extension to all output files it creates from source documents. Dynamic includes, however, require a scripting language to support the include action, and scripting languages require the appropriate file extension in order to parse the web page on a web server (or Content Server).

- 1. With your project open in Content Publisher, choose **Application Options** from the **View** menu.
- 2. Click the General tab.
- 3. Under **Default Output Extension**, specify the file extension appropriate for your scripting language.
- 4. Click OK.

File extensions must be specified in Content Publisher. Any file extension you have specified in your third-party application for the custom table layout will not be used by the project.

The supplied scripting languages have the following file extension requirements: Idoc Script requires .idoc for the included reference page and .hcsp for all other pages; ASP requires .asp; SSI requires .shtml (this value is dependent on web server settings); and JSP requires .jsp.

Idoc Script pages must also be stored in Content Server, and the template for the included reference page must contain the same Idoc Script reference as the include statement. (This text is entered in the Before and After text boxes in the Globals HTML tab dialog.)

Example: The Idoc Script TOC supplied in your third-party application (see Dynamic Include Token Syntax on page 5-112) would require the following HTML before and after tags in your TOC template: <@dynamichtml TRANSIT_TOC_RESOURCE@> [before] <@end@> [after]

The extension you specify in Content Publisher will be used only for new source documents added to the project after the change.

Chapter 60

TEMPLATES

This section covers the following topics:

- ✤ About Templates (page 6-2)
- Template Summary (page 6-3)
- Choosing a Template (page 6-3)
- Copying a Template (page 6-4)
- Creating a New Template (page 6-4)
- Deleting a Template (page 6-5)
- Exporting a Template (page 6-5)
- Using the Edit Template Dialog Box (page 6-7)
- Template Names (page 6-7)
- Template Name Conflict (page 6-8)
- Saving a Template (page 6-9)
- Template Editing Options (page 6-9)
- Default Template Settings (page 6-10)
- Templates and Associated Graphics Sets (page 6-11)
- Managing Templates (page 6-12)
- Importing a Template (page 6-13)
- Template Name Conflict (page 6-8)
- Linking to an External Template (page 6-14)

Templates

- Template Guidelines (page 6-15)
- Element Setup (page 6-16)
- Formatting (page 6-96)
- Navigation Topics (page 6-134)
- Global Settings (page 6-173)

ABOUT TEMPLATES

A template is a set of formatting instructions you can associate with one or more source documents in a publication. It is saved as part of the project file.

When you add a document to a publication, you associate a template with that document. When Site Builder imports styles (or patterns) from the document, it automatically generates an element for each style (or pattern), and places the elements in the template. (If you use the default setting None in the Choose Template dialog box, Site Builder will associate ranks with elements instead.)

To turn a source document into a Web page, you select the template associated with the document and edit the template, using the four Template Editing Options (page 6-9).

You can associate only one template with any given source document, but you can associate the same template with many different documents.

A template typically isn't a standalone file, but you can export a template to create one. You can then import the template file into another project (to become an internal template).

Alternatively, any workstation with access to a standalone template file on the file system can link to that template and use the template to format source documents. However, you cannot change the settings of a template while it is linked. You must import the linked template into a project in order to modify it.

If the template associated with a document is internal, you can change it at any time. In the Contents pane, select the template and open the Choose Template dialog box. (You can also open the Choose Template dialog box from the Document Properties dialog box.)

TEMPLATE SUMMARY

Each time you start a new project, Site Builder opens a copy of Default.tcp, the default project file. As a result, several existing templates (Administration, etc.) are already part of the project. You can check the templates, available by opening the Manage Templates dialog box.

Site Builder ships with 19 body templates:

- The Blank template contains no ranks, styles, patterns, or metadata, or any other default settings. This template is often useful the first time you translate a source document to see how the document will look when "passed through" Site Builder without any formatting being done.
- 14 body templates have various default settings for promotion, splitting, and so forth. (See Default Template Settings on page 6-10.) These body templates also have a complementary TOC, Index, and Query template. In each case, the same graphics set is associated with all four templates—body, TOC, Index, and Query—to ensure a consistent look throughout your publication.
- 4 special-purpose templates are designed for use with source documents created in certain spreadsheet and presentation applications; each has a complementary TOC template but no Index template. (See Default Template Settings on page 6-10.)
- Templates with "CSS" in the name have Cascading Style Sheets turned on.

CHOOSING A TEMPLATE

When you select a source document to add to a publication, the Choose Template dialog box opens automatically for you to associate a template with that document. You can change the template at any time.

In the Contents pane, select the source document you want to edit and click Choose Template () on the toolbar.

In the Choose Template dialog box, the source document is highlighted in the Documents list box, and the template currently associated with the document is highlighted in the Templates list box.

2. In the Templates list box, select the template you now want to associate with the source document (or click the New button to create a new template).

If the Auto check box is turned on, you will see a temporary translation of the document in the Preview window for the template you have just selected. (If the Auto check box is clear, you can either select the check box or click the Update Now button.)

3. Click **OK** to return to the main window, where the new template is now listed for that source document in the Contents pane.

You can also enter the Choose Template dialog box from the Document Properties dialog box.

The default setting for importing styles or patterns is None. If, when you first associate a template with a source document, you select Styles or Patterns, Site Builder will import styles or patterns at that time. You can also select one of these options when you change the template associated with a particular source document. However, if you have already selected None and later want to import styles or patterns, you must do so from the Contents pane. Select all the source documents associated with the template, right-click, and choose Import and then Styles (or Patterns) from the popup menu.

COPYING A TEMPLATE

The simplest way to copy a template is to open a publication containing the template you want to copy, and then create a new template based on that template. See Creating a New Template (page 6-4).

CREATING A NEW TEMPLATE

When you select a document in the Add Document dialog box, the Choose Template dialog box opens automatically to show the first template in the Template list already associated with the document. You can associate another template with the document, instead, or create a new template. In fact, you can create a new template at any time and associate the new template with any document in a publication.

- 1. In the Contents pane, click Manage Templates (
- 2. Click New to open the New Template dialog box.
- 3. In the text box, enter the name of the new template. If you want the new template to contain some of the formatting instructions of an existing template, select the existing template from the Based On list. Until you modify its settings, the new template will be identical to the one it is based on.

- 4. Check the appropriate radio button for the type of template you want to create: Body, Reference, or Index.
- 5. Select **This template should use CSS style formatting by default** if you want to allow CSS formatting in the new template. With the check box selected, additional formatting options will be available in the Character and Paragraph tab dialogs of **Formatting**.
- 6. Click **OK** to return to the Manage Templates dialog box.

The new template is now listed with other templates in the project and can be associated with any document. The templates are listed alphabetically.

If you create a reference template, the same template will be used each time you add a TOC (table of contents), LOT (list of tables), or LOF (list of figures) to your project. In other words, these three default reference templates differ only in name.

DELETING A TEMPLATE

You delete a template in the Manage Templates dialog box.

- 1. In the Contents pane, click Manage Templates (
- 2. In the Manage Templates dialog box, select the template you want to delete.
- 3. Click **Delete** (or press the Delete key on your keyboard).
- 4. Repeat steps 2 and 3 to delete any other templates in the project.
- 5. Click **OK** to return to the main window.

You cannot delete a template that is associated with a source document. The Delete button is grayed out each time you select such a template.

EXPORTING A TEMPLATE

Templates are typically not standalone files. You create and name templates and save them as part of a project file. The project file contains all key data for the project, including information about the publication hierarchy, source documents and output files, as well as formatting instructions captured in the templates.

But if one project contains a template you want to use in another project, you can export a template file from the first project for use in the second.

1. Open the project containing the template you want to export.

- 2. Click Manage Templates () on the toolbar to open that dialog box.
- 3. In the Template list, select the template you want to export.
- 4. Click **Export** to open the Export Template Format dialog box. (If this dialog box doesn't open and you want to pick a format other than the default binary, you can choose to show this dialog box by setting a switch in the Dialogs tab dialog of the Application Options dialog box.

Binary is the default format for any template export to create a standalone template file. You can also export a template in the Full or Compact XML formats. You can open an XML template in an XML editor or Notepad. Generally, you should not edit this file, but you might find it useful if you want to make a global change for a path to a network server, say, that has been renamed. The Full XML format explicitly states all settings, including the default ones; the Compact XML explicitly states only changes to default settings

- 5. In the Export Template Format dialog box, select a format for the template you are exporting and click **OK**.
- 6. In the Export Template dialog box, use the Save In drop-down box and other commands to locate the folder in which you want to place the exported template.
- 7. In the File Name text box, change the file name, if you want.

When you export a template, the default template file name is the same as the template name. But you can name the template file differently. If you do, the template will still retain its original name, and this will be recognized by Site Builder when the template file is later imported into another project. So when you import a template, the name that displays in the Manage Templates dialog box may be different from the file name. See Template Names (page 6-7).

8. Select the folder and click **Save**.

You have saved the template as a file in the specified directory. The extension .ttp has been assigned by default.

Instead of importing a standalone template file, any user at a Site Builder workstation who has access to that template file on the network can link to it and associate the template with any source document in any project on the workstation. (However, a template cannot be modified while linked. It must be imported into a project in order to be modified.)

USING THE EDIT TEMPLATE DIALOG BOX

You can simplify the editing of a template by using the Edit Template dialog box to move easily between **Element Setup**, **Formatting**, **Navigation**, and **Globals** without returning to the main window. In the Edit Template dialog box you can:

- Quickly identify the elements you want to edit because as you pass your cursor over the content of the Preview window a screentip displays the name of each element.
- See your changes in the Preview window each time you return to the dialog box after working in one of the property sheets.

To open the Edit Template dialog box In the Contents pane, select the template you want to edit. Click **Edit Template** on the standard toolbar or large toolbar.

You can use the commands in the Edit Template dialog box to open the four property sheets to complete all editing for the template.

Follow these steps to preview another document:

- 1. In the Edit Template dialog box, click **Change Preview** to open that dialog box.
- 2. From the list of documents the template is associated with, select the one you want to preview as you edit the template.
- 3. Click OK.
- 4. In the Edit Template dialog box, click **Update Now**. The document appears in the Preview window.

To preview your Web pages, you must have Internet Explorer 4.0 or higher or Netscape Navigator 6.01 or higher installed on your machine. See Previewing Web pages (page 7-3).

TEMPLATE NAMES

Each template has its own name, as listed in the Manage Templates dialog box. A template name must be unique for each project. When you export a template to create a standalone template file, you can give the template a file name different from the name shown in the Manage Templates dialog box. However, the original, underlying template name is retained.

When you import a template, Site Builder always recognizes the underlying template name (as listed originally in the Manage Templates dialog box). If you rename a template as you export it, and then try to import it into another project, you will receive an error message if the second project has a template with the same name as the original, underlying name of the template you exported.

Tips

- If you want to change the name of a template, it is best to do this in the Manage Templates dialog box, before you export it. (Double-click the template name, with a pause between clicks, and then change the name.) In fact, you can change the original name of a template only in the Manage Templates dialog box.
- If you export a template and want to keep the template name and the file name the same -- and that name is different from the original template name -- change the template name before you export the template (see Tip 1).
- When you import a template into a project, Site Builder recognizes the template by its original template name not its file name. If a template by the original template name already exists in the project, the Template Name Conflict dialog box will open as soon as you try to import the template. You can overwrite the template already in the project or give the template your are importing a new name.
- Template names must be unique in Site Builder. If, when you create a new template, you enter a name in the Name text box of the New Template dialog box that is already being used by an existing template, you will get an error message.

TEMPLATE NAME CONFLICT

When you import a template, the name of the template as originally created in the Manage Templates dialog box is the name that will be used during import. That is, Site Builder always recognizes the original, underlying template name.

Say you export the template Academy as Academy2 (renaming it in the Export Template dialog box). If the Academy is part of a project when you later try to import Academy2, you will receive a "Template Name Conflict" message. To avoid this, you should always rename templates in the Manage Templates dialog box.

If you receive a warning message, you may choose to overwrite the existing template with the one you're importing or enter a new name in the dialog box. If you don't mind overwriting the file specified, click **OK**; otherwise, enter a new name in the Template Name text box, and then click **OK**.

SAVING A TEMPLATE

A template and its formatting instructions are saved as part of the project file. The instructions include those applied to the template itself and those applied to the elements in the template.

To save a template, click Save on the toolbar or choose Save from the File menu.

You have now saved the project file for the publication and therefore all the templates in that project file.

TEMPLATE EDITING OPTIONS

After you have selected source documents for translation, you work with the templates associated with those documents. You create a set of instructions for each template, in turn, to determine how its source document will look when turned into Web pages.

Some instructions are applied to the template itself. Most are applied to the individual elements that reside in each template. There are four options for editing templates:

Element Setup—Where you manage elements. You can change the relationships between elements and the ranks, styles, or patterns in your template; use elements to determine the placement of content in body and reference pages; create new elements, ranks, styles, or patterns; and create metadata to include information about your source documents in the Web pages you create and in the Head of your output HTML.

Formatting—Contains numerous options for formatting the text in your source document. When you create Web pages, you'll spend much of your time in the Character and Paragraph tab dialogs, in particular, formatting each element in the template. Additional formatting options are available in these two tab dialogs when Cascading Style Sheets (CSS) are turned on.

Navigation—Where you set links for the pages of your Web publication, either for Web pages (Page Button Bar and Page Text Bar tab dialogs) or individual elements (Element Button Bar and Element Text Bar tab dialogs). Optional navigation buttons allow you to print all or a portion of your Web publication, to return to the top of your root publication from anywhere in the publication, and to you open the source document used to create a Web page in its native format.

Globals—These settings are generally for the Web page as a whole, and include inserting an address to appear at the end of your Web page. Some settings in the Options tab dialog are template-based, for example, whether to allow CSS in your template.

DEFAULT TEMPLATE SETTINGS

Following is a list of the default settings for the 14 general-purpose body templates. This isn't necessarily a complete list of the settings. If you decide to use any of these templates, you should check the template before using it.

Feature **Default Setting** See Templates and Associated Graphics Sets **Graphics Set** (page 6-11) Elements promoted to TOC Title and Heading 1 Treatment of elements on TOC Title flush left, Heading 1 indented Split On Heading 1 Fonts Take from Source, Arial, or Verdana Navigation buttons in Body Previous Page, Next Page, TOC, and Index (TOC and Index display only if your publication has a TOC and Index) None Navigation buttons in TOC Navigation buttons in Index None; Index may contain an Element Text Bar Navigation buttons in Query None Ranks Lowest 1, Title, Lowest 2, Heading 1 Character patterns HTTP, Weblink, Email Metadata Keywords Imported graphics Converted to Gifs; no alignment Cascading Style Sheets (CSS) Turned on for those templates with 'CSS' in their name

General-Purpose Templates

Feature	Default Setting
Link colors	Specified, but vary with template

The following table lists the four specialized templates for use when the source documents were created with one of the following spreadsheet or presentation applications shown below.

Template	Comment
Lotus 1-2-3 Lotus 1-2-3 TOC	No ranks or metadata
Lotus Freelance Lotus Freelance TOC	Default styles: Automatic Heading, Heading 1, Normal, Slide, and Speaker Notes
MS Excel MS Excel TOC	No ranks or metadata
MS PowerPoint MS PowerPoint TOC	Includes a number of default styles not assigned to elements: Body #1, Body #2, etc.; Center Body 1, Center Body 2, etc.

TEMPLATES AND ASSOCIATED GRAPHICS SETS

The table below lists all 19 body templates in the default project file. The graphics set listed for each body template is also associated with the TOC, Query, and Index templates, where available. (There are 28 graphics sets in Site Builder, so not all are used.)

Template	Graphics Set
Academy	Aqua Weave
Acclaim CSS	Investment
Account	Clearing House
Adagio CSS	Gray Tab

Template	Graphics Set
Administration	Planner
Analysis	Grouted Tiles
Archive CSS	Scalloped
Blank	None
Business	Blue Bevel
Ceremonial	Blue Mexico
Courtesy CSS	Cranberry Script
Executive	Gray Tab
Introduction CSS	Blue Peach
Lotus 1-2-3	Royal Cloth
Lotus Freelance	Olive
MS Excel	Skill Set
MS PowerPoint	Maroon Sand
Purple Frost	Lilac Spiral
Retrofied! CSS	Salmon Retro

MANAGING TEMPLATES

The Manage Templates dialog box lists all the templates and source documents in a project.

In the main window, click **Manage Templates** ()) on the standard toolbar or the large toolbar. You do not need to select a template in the Contents pane to open the dialog box.

The Manage Templates dialog box lists, alphabetically, all the templates available in the project currently open in Site Builder. If no project is open, you will see all the templates available for the default template, Default.tcp.

The Location column tells you whether a template is internal or linked. You can recognize a linked template by the path and file name for the template file somewhere on the file system or in Content Server.

From this dialog box, you can click:

- ✤ New to create a new template
- Delete to remove the selected template from the Template list
- Import or Export to import a standalone template file or to create a standalone file of the selected template (placing the file either on the file system or in a content server)
- Link to create a link to an external template. You can use a linked template to format your Web pages as you would an internal template. However, you must import the template into a project in order to edit it.
- Details to view the Content Information page for the selected template (which must be a linked template in Content Server)
- Update Versions to update the selected template (which must be a linked template from the file system or Content Server)

Site Builder ships with 19 template sets. See Template Summary (page 6-3) for the list of templates and their default settings.

IMPORTING A TEMPLATE

Templates are typically not standalone files. You save them as part of a project file. The project file contains all key data for the project, including information about the publication hierarchy, source documents and output files, as well as formatting instructions captured in the templates.

But if one project contains a template you want to use in another project, you can export a template file from the first project for use in the second.

- 1. Open the project you want to import the template into.
- 2. Click Manage Templates () on the toolbar to open that dialog box.
- 3. Click **Import** to open the Import Template dialog box. Use the Look In drop-down box and other commands to locate the folder containing the template you want to import, and then open the folder.

If the template has the recommended .ttp extension, the template will display in the window when you open the appropriate folder. If you are using another extension for

the template file, type this extension, preceded by *. in the File Name text box (*.ext), and then press the Return key.

- 4. Select the template and click **Open**.
- 5. The Template Paths Verification dialog box will open. Site Builder is simply verifying the location of Gallery and other images. Click **OK**.
- 6. The Template Name Conflict dialog box may open. This will happen if the original name (not the file name) of the template you are importing happens to be the same as an internal template in your project. See Template Names (page 6-7). Select Overwrite existing template if you want the imported template to overwrite the existing template in your project. Alternatively, enter a new name in the text box for the template you are importing.
- 7. The Import Template dialog box closes and you return to the Manage Templates dialog box. The template displays in the Templates list. (Templates are listed alphabetically in the list box.)

The template can now be associated with any source document in the project.

Instead of importing a standalone template file, any user at a Site Builder workstation with access to that file on the network can link to it and associate the template with any source document in any project on the workstation. (However, a template cannot be modified while linked. It must be imported into a project in order to be modified.)

LINKING TO AN EXTERNAL TEMPLATE

Templates typically are part of a project file. But you can export a template to create a standalone template file. You then have the option of importing that file into another project (see Importing a Template on page 6-13) or creating a link to the external template.

Linking to an external template can be a useful way for several content creators in an organization to use the same template and thus maintain consistent standards for the creation of Web publications. Control is maintained because you cannot change the settings of a template while it is linked. The template must be imported into a project in order to edit it. As long as the linked template is available to users on a network, any number of users can link to it.

- 1. Click Manage Templates () on the toolbar to open that dialog box.
- 2. Click the **Link button** to open the Link Template dialog box. Locate the external template on your file system. Select the template and click **Open**.

The Template Paths Verification dialog box will open. Site Builder is simply verifying the location of Gallery and other images. Click **OK**.

- 3. The Template Name Conflict dialog box may open. This will happen if the original template name (not the file name) of the template you are linking to happens to be the same as an internal template in your project. Site Builder treats an imported template and a linked template in the same way. See Template Names (page 6-7).
- 4. Select **Overwrite existing template** if you want the linked template to overwrite the existing template in your project. Alternatively, enter a new name in the text box for the template you are linking to.
- 5. Click **OK**. The linked template now appears in the Manage Templates dialog box, with its path and file name shown in the Location column.

TEMPLATE GUIDELINES

Consider these guidelines when managing templates:

- The templates in the default project file are simply a starter list. If you use any of them, it would be best to first review the template settings to confirm what is listed and to identify any settings that may not be listed.
- If you use one of the templates in the default project file, it would be best to create a new template based on the template provided—giving it a unique name in the process. That way, there will be no danger of overwriting the new template.
- When you rename a template, it's best to do so in the Manage Templates dialog box, which displays the underlying name of each template. This name will be retained in the template even if you rename the template as you export it or rename the template file in Windows Explorer. When you import a template into a project, Site Builder recognizes the underlying template name and compares it to the list of templates already in the project. If there's a match, you can either overwrite the existing template or rename the one you are importing.
- Project files can be quite large (even when zipped). If you want to keep project files small, you might want to delete the templates you are not using. Alternatively, you can edit the project file by exporting most of the templates and 'parking' them in a safe place. You can then simply import them as you need them. You might want to do this with the template files you create as well as the ones supplied by Site Builder. Of course, with Site Builder's linking functionality, you can always link to an external template. (You will need to import the template into a project in order to edit it.)

Any templates you have been using with a previous version of Site Builder can still be used when you import a project file into Site Builder. You can also import old templates into the new default project file. (You will first need to export those templates from the old projects and import them into the default project file.)

ELEMENT SETUP

This section covers the following topics:

- About Elements (page 6-16)
- Element Setup (page 6-17)
- Elements (page 6-17)
- Ranks (page 6-31)
- Styles (page 6-43)
- Patterns (page 6-51)
- Metadata (page 6-67)
- Elements and HTML tags (page 6-88)
- Styles in Source Documents (page 6-90)

About Elements

Site Builder uses elements as "handles" to format the content of source documents and associate the styles or patterns in those documents with the HTML tags that control the appearance of Web pages. Site Builder does this automatically, so you don't need to worry about the HTML tags themselves. Site Builder likewise associates ranks with HTML tags if you choose not to import styles or patterns.

When you add a source document to a publication, you choose a template for the document. And when Site Builder imports styles or patterns from the document, or creates a default set of ranks, it generates a corresponding element for each rank, style, or pattern, and places those elements in the template.

You create the look of a particular Web page by editing the template that is associated with the source document. Some of the instructions apply to the template itself, but most apply to the individual elements in the template. Elements lists throughout Site Builder can help you select the elements to edit. For example, an Elements list is always available in **Formatting**, no matter which tab dialog you're working in, and the currently selected element is always highlighted on the list.

Element Setup

Element Setup is one of four property sheets used to edit templates. Once you set up a project, you use the property sheets to complete settings for each template in the project. The settings determine the look and behavior of a Web page created from any source document associated with the template.

In **Element Setup** you can review the elements generated for the styles or patterns imported from the source document, or for the ranks created by Site Builder (if you import neither styles nor patterns). With a new project, in particular, you may want to fine-tune the elements and possibly merge some ranks, styles, or patterns, or create new ones.

Among the options are the ability to control the placement of content in the Web pages you create and to "promote" elements so that the content of body pages can be included in reference pages.

After you select a template for editing, you can open **Element Setup** and the other property sheets by clicking the buttons on the Template toolbar. Or you can open the Edit Template dialog box and move between the four property sheets from there. You can use the property sheets in any order.

Elements

This section covers the following topics:

- Changing Element Assignments (page 6-18)
- Changing Element Properties (page 6-19)
- The Elements List (page 6-19)
- Changing the Name of an Element (page 6-21)
- Creating a New Element (page 6-21)
- Element Properties (page 6-22)
- Elements Tab Dialog (page 6-22)
- Handling an Event for an Element (page 6-23)
- Linking Reference Pages (page 6-24)

- Placing an Element in a Meta Tag (page 6-25)
- Placing an Element in Your Web Pages (page 6-26)
- Removing an Element From a Template (page 6-27)
- Promoting an Element (page 6-27)
- Ranks, Styles, and Patterns (page 6-28)
- Changing the Association Between a Rank, Style, or Pattern and an Element (page 6-29)
- Special Elements (page 6-30)

Changing Element Assignments

When you select a source document for translation, you formally associate a template with that document. As a result, Site Builder either creates a set of default ranks to apply to the content or it imports styles or patterns from the document. At the same time, Site Builder generates an element for each rank, style, or pattern. The elements are saved in the template.

You use the elements to edit the template to determine how the Web page will look once you translate the source document. One editing choice is to decide what content to place in the body page and in the page table of contents (TOC), which is part of the body page. By default, Site Builder assigns all elements to the body page and none to the page TOC.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (1) on the toolbar.
- 2. Click **Elements** to open that tab dialog.

The green check marks and the red crosses in the In Body and In Page TOC columns indicate whether content associated with an element has been assigned to the body page or page TOC, respectively.

- 3. Under Name, select the element you want to re-assign.
- 4. Right-click the green check mark or red cross in whichever column (In Body or In Page TOC) that you want to change.
- 5. From the popup menu that appears, choose the cross or check mark you want to use instead. The popup menu closes and the association is now changed.

With the element selected, you can also click Properties to open that dialog box and change the association there. The Properties dialog box provides an additional option to

include content associated with an element in Meta tags in the Head of HTML files. See Placing an Element in a Meta Tag (page 6-25).

Changing Element Properties

elements contain a number of properties you can change in Element Properties in Element Setup.

To change the property of an element:

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Elements** to open that tab dialog.
- 3. From the Elements list, right-click the name of the element you want to change and choose **Properties** from the popup menu (or select the element and click the Properties button).
- 4. In the Element Properties property sheet, click the appropriate tab to open that tab dialog and make the changes you want.
- 5. Click OK.

Click Related Topics for topics that explain the tab dialogs in Element Properties.

The Elements List

When you view the Elements list in Formatting or elsewhere in Site Builder, typically you will see the following:

Figure 6-1 Typical elements list

Elements
💶 Heading 1
Para Indent
💶 🔁 Intro
💶 🚽 List Number
💶 🗧 Normal
💶 🔁 Title
🗳 🗧 Email
E HTTP
🗳 Vebsite
🖳 Address (System)
💶 Default
🖳 Email (System)
🖳 Title (System)
🛂 Default Character
E Heading 2
1

It is important to understand the different kinds of elements and how they are listed throughout Site Builder. The elements in the above list are presented alphabetically as follows:

0 A	Paragraph elements. These are derived from styles or patterns in the source document, or have been associated with ranks.
₽ >	Character elements. These are derived from character styles or pattern matching on special formatting in the source document.
	System paragraph elements. These are common to all templates and cannot be removed.
<u>a</u>	System character element. Default Character is the only such element.
П _л	Paragraph elements not currently assigned to any rank, style, or pattern are grayed out and placed below the bar.

Three system paragraph elements not shown are **Index Heading, Index Entry**, and **Index SubEntry**, which are found only in the template for an Index reference page.

For more on the system paragraph elements, see Special Elements (page 6-30).

Changing the Name of an Element

Elements contain a number of properties you can change in Element Properties in Element Setup.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Elements** to open that tab dialog.
- 3. Right-click the element you want to change and choose **Properties** from the popup menu.
- 4. Click General to open that tab dialog.
- 5. In the Name text box, type the new name for the element.
- 6. Click OK.

Creating a New Element

When you select a source document for translation, you formally associate a template with that document. As a result, Site Builder either creates a set of default ranks to apply to the content or it imports styles or patterns from the document. At the same time, Site Builder generates an element for each rank, style, or pattern. The elements are saved in the template.

You can create new elements, if you want. This is especially useful when you import patterns from a manually formatted source document, because only four elements are assigned initially to the content of such a document. Since Default Paragraph is assigned to most of the patterns, you might want to create unique elements for all patterns after the top three. This will increase your formatting options.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click New to open the New Template dialog box.
- 3. Under Name, enter the name of the new element you want to create.
- 4. Change the default HTML tag <P>, if necessary.
- 5. Under Element Type, select Paragraph or Character.
- 6. Click **OK** to return to the Elements tab dialog.

The new element appears grayed out at the bottom of the Elements list. Once you assign the element to a rank, style, or pattern, it becomes active and appears in regular type in the top portion of the list. In most cases you will create a paragraph element. But you may need to create a character element for a character style or pattern, for example, if you want to search for a specific word or phrase in the document.

Element Properties

Elements contain a number of properties you can change in Element Properties in Element Setup.

- In the General tab dialog you change the name of an element. You also specify its inclusion in the body or page TOC, or within a Meta tag in the Head of the HTML file.
- In the Promote tab dialog you can promote content from body pages to any reference pages you build. You can also promote elements from reference pages at one level in a publication to a higher level. This can be especially useful if you want to create a single master TOC at the root level for a multi-tiered publication.
- The Links tab dialog is used to link a reference page to a body document or page TOC. (This tab dialog is available only when you edit a reference page template.)
- The Split tab dialog is used to split a source document into a series of smaller body pages to facilitate viewing and downloading. You can split a source document on any element.
- In the HTML Tags tab dialog you can place custom HTML tags before and after elements.
- In the Meta Tag tab dialog you can give a name to the element when it is included in a Meta tag in the Head of the HTML file. You can also specify custom tags. (This tab dialog is available only when you edit a body page template.)
- In the Events tab dialog you can specify an event for the element, that is, HTML or scripting code to be included in the tag for the element.

You can change element properties at any time (see Changing Element Properties on page 6-19).

Elements Tab Dialog

When you select a source document for translation, you formally associate a template with that document. As a result, Site Builder either creates a set of default ranks to apply to the content or it imports styles or patterns from the document. At the same time, Site Builder generates an element for each rank, style, or pattern. The elements are saved in the template.

Element Setup contains four tab dialogs that let you view ranks or imported styles or patterns, along with the elements assigned to them. (A fifth tab dialog summarizes any metadata in the template.)

In the Elements tab dialog, you can perform the following actions:

- Control the placement of content in the body and reference pages of your publication
- Change the assignment of content to the page table of contents, which appears at the beginning of the body page
- Select an element to split a source document into a series of smaller Web pages for ease of browsing and downloading (separately, you can choose to split a source document on hard page breaks)
- "Promote" elements to the reference pages you build when you translate the source document.

Handling an Event for an Element

You can assign an event handler to an element that is triggered by an event in your browser. Such an event handler might be onClick or onMouseOver. You could also include HTML code or JavaScript.

Follow these steps to assign an event handler or include HTML or scripting code:

- 1. Click Element Setup (**P**) on the toolbar to open the Element Setup property sheet.
- 2. Select the element you want to assign an event handler to, and click Properties.
- 3. Click **Include HTML or scripting code in the element's tag**, and then click either **Use the following** or **Use the contents of this file**.
- 4. If you click **Use the following**, enter the code you want to use in the box provided.
- 5. If you click **Use the contents of this file**, enter the path and file name in the text box, or click **Browse** to locate the file, or click **Gallery** to pick a file from the HTML Code folder in the Gallery.
- 6. If you pick a file from Content Server, you will activate the **Info** button (**1**) and thereafter will be able to open the Content Information page for that file at any time.
- 7. Click OK.

If you select **Use the contents of this file** and the referenced file references another file, such as a graphic, this file should be listed in the Associated Files dialog box so that Site Builder will copy the latter file to the output directory when you translate the publication. See Associating a File With a Publication (page 5-99).

To temporarily remove an event handler from an element but keep it available for future use, clear the **Include HTML or scripting code in the element's tag** check box. When you are ready to assign the event handler once more, select the check box.

See Handling an Event Within a Frameset (page 5-64), Handling an Event Within a Body Page (page 6-179), and Tokens for Adding HTML Code (page 6-186).

Linking Reference Pages

Elements contain a number of properties you can change in Element Properties in Element Setup.

When you include a promoted element in a reference page, Site Builder automatically creates a link from the reference page to the body page for the content associated with that element. You have the option to link in other ways to the body page or to not link at all.

- 1. In the Contents pane, select the reference page template you want to edit and click **Element Setup** (
- 2. Click Elements to open that tab dialog.
- 3. Select the element you want to change and click **Properties**.
- 4. Click Links to open that tab dialog.
- 5. From the Links Type drop-down list, select the appropriate option.
- 6. Click OK.

Each link option serves a specific purpose:

- No link might be useful with an abstract, to preserve the links to chapter headings in the source document while eliminating the links to the introductory material (abstract) that follows each heading.
- Site Builder uses Link to content in body document, for example, to link TOC entries to headings in body pages. The Link to page TOC entry in body document option would be appropriate for linking a TOC to entries in the page TOC of a body page.
- Link to next level reference document of same type is appropriate when promoting elements through the same type of reference page at different levels.
- Link to top of body document can be useful when you have navigation bars at the top of body pages. This link will take the user to the top of a body document, so the user won't have to scroll to the top of a page to see the navigation buttons.

The Links tab dialog is available in the Element Properties tab dialog only when you edit a reference page template.

Placing an Element in a Meta Tag

Any element can be placed in a Meta tag in the Head of your HTML files, to facilitate searches on your Web server. It can also be placed in your Web pages, (see Placing an Element in Your Web Pages on page 6-26) to be visible to users.

Site Builder automatically creates elements for the styles, patterns, and ranks in each template, but it doesn't do so for metadata. (The standard metadata Keywords was created specially for the templates that ship with Site Builder.) You must make a metadata element-based (see Making a Metadata Element-Based on page 6-78) in order to include it in your Web publications.

Certain elements are automatically included in the Meta tag of your HTML files. So the following procedure may not be necessary.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. In the Elements tab dialog, select the element you want to include in the Head of your output HTML.
- 3. Click Properties to open the Element Properties dialog box.
- 4. In the General tab dialog, select Include in Head with Meta tag.
- 5. Click Meta Tag to open that tab dialog.
- 6. Select **Use standard Meta tag** and enter the name you want to appear within the Meta tag to describe this element. You may want to use the element name itself.
- To use custom tags instead, click Use custom tags, select the appropriate check boxes, and enter the opening and closing tags in the text boxes. See Using Custom Tags for New Metadata (page 6-82).
- 8. Click OK, and OK again.

For a metadata to appear in a Meta tag, it must exist in the source document (in the case of standard or custom metadata) or in the content server (in the case of content server metadata). As with the elements for styles, patterns, and ranks, the metadata you create will apply to all source documents associated with the template you edit.

The order in which metadata are listed in the Metadata tab dialog of Element Setup determines the order in which the metadata will appear in the Meta tags of your HTML

output. You can use drag-and-drop to move an element up or down the list of metadata. See Ordering Metadata (page 6-86).

In addition to being placed in Meta tags, metadata can also be published to a content server (see Publishing Metadata to a Content Server on page 6-79) to be used for searching and categorizing documents in the content server.

Placing an Element in Your Web Pages

Any element can be placed in your Web pages, to be visible to users. It can also be placed in a Meta tag (see Placing an Element in a Meta Tag on page 6-25) in the Head of your HTML files, to facilitate searches on your Web server.)

Site Builder automatically creates elements for the styles, patterns, and ranks in each template, but it doesn't do so for metadata. (The standard metadata Keywords was created specially for the templates that ship with Site Builder.) You must make a metadata element-based (see Making a Metadata Element-Based on page 6-78) in order to include it in your Web publications.

Certain elements are automatically included in your Web pages. So the following procedure may not be necessary.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. In the Elements tab dialog, select the element associated with the metadata you want to include in your publication.
- 3. Click **Properties** to open the Element Properties dialog box. In the General tab dialog, by default, the element is already checked to appear in the Head of your HTML output files. You can also include the metadata in the body of your Web pages and/or the page TOC.
- 4. Select or clear the **Include in Body** and **Include in Page TOC** check boxes, so that the appropriate metadata will display automatically in your Web pages once you translate your publication.
- 5. Click OK, and OK again.

For a metadata to appear in your Web pages, it must exist in the source document (in the case of standard or custom metadata) or in the content server (in the case of content server metadata). As with the elements for styles, patterns, and ranks, the metadata you create will apply to all source documents associated with the template you edit.

The order in which metadata are listed in the Metadata tab dialog of Element Setup determines the order in which the metadata will appear in your Web pages. You can use

drag-and-drop to move an element up or down the list of metadata. See Ordering Metadata (page 6-86).

In addition to being placed in your Web output, metadata can also be published to a content server (see Publishing Metadata to a Content Server on page 6-79), to be used for searching and categorizing documents in the content server.

Removing an Element From a Template

When you select a source document for translation, you formally associate a template with that document. As a result, Site Builder either creates a set of default ranks to apply to the content at translation or it imports styles or patterns from the document. At the same time, Site Builder generates an element for each rank, style, or pattern. The elements are saved in the template.

You can remove an element, if you want. You may want to do this if you import duplicate styles under different names. You can associate all the styles with a single element and remove the elements you don't need. This shortens the list of elements and makes it easier to manage.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Elements** to open that tab dialog.
- 3. Select the element you want to remove and click Delete.
- 4. The rank, style, or pattern associated with the element is now associated with the Default Paragraph element. You can associate the rank, style, or pattern with another element, instead.
- 5. When you've finished removing elements, click **OK**.

Promoting an Element

Elements contain a number of properties you can change in Element Properties in Element Setup.

The Promote property lets you promote content from body pages to any reference page in your publication. You still need to add the reference page to your publication and formally include the promoted element in the body of the reference page (see Creating Reference Pages on page 5-53).

1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.

- 2. Click **Elements** to open that tab dialog.
- 3. Select the element you want to promote and click the Properties button.
- 4. Click **Promote** to open that tab dialog.
- 5. Click Promote this element, making it available to all reference pages.
- 6. In the Promote As text box, enter the name you want to use for formatting the element in the reference page template. You don't have to give the element a different name. Do so only if you are promoting different elements from different templates and want to format them all the same way.
- 7. Click **OK**. When you return to the Elements tab dialog, the name you enter in the Promote As text box is listed in the Promote As column opposite the element.

In the Elements tab dialog, you can double-click on the appropriate line in the Promote As column to promote an element under its own name. The element name will appear immediately in the Promote As column. You can also right-click and choose Promote from the popup menu.

Ranks, Styles, and Patterns

When you select a source document for translation, you formally associate a template with that document. As a result, Site Builder either applies a default set of ranks to the content or it imports styles or patterns from the document. At the same time, Site Builder generates an element for each rank, style, or pattern. The elements are saved in the template.

With documents that contain named styles, Site Builder can automatically create an element for each style, and you can use these elements to format your documents and turn them into Web pages. With manually formatted styles, Site Builder can instead identify patterns and create elements for those patterns. Where source documents are "mixed," ranks are best.

You decide how Site Builder should handle source documents in the Choose Template dialog box, under Import Styles or Patterns. The default setting is None. Unless you change this, Site Builder will ignore styles and patterns in your source document and recognize content hierarchy in terms of ranks.

- If all your source documents contain named styles consistently applied, select Styles in the Choose Template dialog box and import styles from those documents.
- If all your source documents are formatted manually in a consistent fashion, select Patterns and import patterns instead (but also consider ranks, because they might do a better job).

 If your source documents are "mixed" (some contain named styles, others are manually formatted) or where the styles (whether named or manually formatted) have been inconsistently applied, use the default None for ranks.

The advantage of using ranks for documents is that you avoid any clash of styles or patterns that might arise when adding a large number of source documents. You also avoid importing more styles or patterns than you need for formatting. Ranks can be especially useful if you add a Directory Item to your project.

If you choose None (Site Builder applies a pre-existing set of ranks in order to identify top-level content hierarchy), that doesn't mean you might still not use patterns. Where content is consistent throughout all the source documents, patterns can be used to create additional elements for your template. For example, you could create patterns for bulleted and numbered lists.

If your source documents are text files, you are limited in how you can format the content. Creating patterns, if you can, is probably your best chance.

Changing the Association Between a Rank, Style, or Pattern and an Element

You can change the association between a rank, style, or pattern and its element. You may want to do this if, say, you import two similar styles that you want to format the same way in a body page.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click Ranks, Styles, or Patterns to open the appropriate tab dialog.
- 3. Depending on which tab dialog you are in, select the rank, style, or pattern you want to associate with a different element, and click **Association**.
- 4. In the Change Associations dialog box, select the new element from the drop-down elements list.
- 5. Click OK.

The new element associated with the rank, style, or pattern can be seen in the element column opposite the rank, style, or pattern name.

Special Elements

Site Builder automatically creates elements when you add a document to a project:

- If you accept the default None in the Choose Template dialog box, Site Builder will create four default ranks for the document.
- If you choose Styles, Site Builder will create an element for each imported style in the source document, and gives each element the same name as the style it is associated with.
- In you choose Patterns, Site Builder will create patterns named Pattern1, Pattern2, etc., and uses standard element names such as Title and Heading 1 for the top patterns.

Whichever approach you take, the information will be captured in the template used to translate the document. That template will also contain a number of predefined elements that are part of any body or reference page template and cannot be removed. These special elements represent special source content.

In addition, the template will contain some pre-set elements that can be useful in many projects and which can be deleted, if you want. These -a metadata and three character patterns -a re listed first in the following table.

Icon	Element	Description
0 5	Keywords	Used for keyword metadata in source documents, which by default is included in the Meta tags of output pages.
8 5	Email	Used for links in source documents that contain an email address. Formatting includes necessary HTML code to make such links active in output pages.
₽ <mark>.</mark> }	НТТР	Used for links in source documents that use the HTTP protocol. Formatting includes necessary HTML code to make such links active in output pages.
2	Weblink	Used specifically for links in source documents to the World Wide Web. Formatting includes necessary HTML code to make such links active in output pages.

Icon	Element	Description
1	Address (System)	Used to format the address information entered on the Address tab of the Globals property sheet.
1	Default Paragraph	Associated with any paragraph not matched by a style or pattern.
9 _	Email (System)	Used to format the email information entered on the Address tab of the Globals property sheet.
1 _	Title (System)	Used to format the title information entered on the Titles tab of the Globals property sheet.
9	Index Entry	Assigned to first-level index entries embedded in source files. Controls the appearance of these entries in the index document. Can be assigned only to an index.
9	Index Heading	Assigned to the index headings generated automatically when Site Builder builds an index. Controls the appearance of these headings in the index document. Can be assigned only to an index.
9	IndexSubEntry	Assigned to second-level index entries embedded in source files. Controls the appearance of these entries in the index document. Can be assigned only to an index.
8 <u>.</u>	Default Character	Associated with any character style or pattern that is not associated with a character element.

Ranks

This section covers the following topics:

- Removing a Rank From a Template (page 6-32)
- Ranks Tab Dialog (page 6-33)
- Rank Rules (page 6-33)
- Rank Properties (page 6-34)

- Rank Order (page 6-35)
- About Ranks (page 6-36)
- Changing the Alignment Property of a Rank (page 6-37)
- Changing the Association Between a Rank and an Element (page 6-38)
- Changing the Ront Property of a Rank (page 6-38)
- Changing the Color Property of a Rank (page 6-39)
- Changing the Properties of a Rank (page 6-40)
- Changing the Rank Rules (page 6-40)
- Creating a New Rank (page 6-41)
- Hierarchy and Frequency of Ranks (page 6-43)

Removing a Rank From a Template

When you add source documents to a project and accept the default setting None under Import Styles or Patterns in the Choose Template dialog box, Site Builder applies a default set of ranks in the template to content at translation time: Lowest 1, Title, Lowest 2, Heading 1. These ranks are designed to identify content hierarchy in source documents so that top-level content, in particular, can be handled consistently.

After initial setup, you may create a number of additional ranks for a particular template only to discover later that one or more of the ranks is no longer needed. You can easily remove any rank from a template.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (
- 2. Click **Ranks** to open that tab dialog.
- 3. Under Rank, select the rank you want to delete, and click Delete.
- 4. Click Elements to switch to the Elements tab dialog. The element is now grayed out, below the line.
- 5. Select the element and click **Delete**.

The content associated with that rank is now associated with the Default Paragraph element.



Important: When you remove a rank, Site Builder re-evaluates content in terms of the remaining ranks the next time you translate. If you deleted Title, say, Site Builder would assign Heading 1 to content it formerly assigned Title to. So you should be careful how you delete ranks. Also, the element associated with the rank remains. You can associate the element with another rank or remove the element, too, from the template.

Ranks Tab Dialog

When you add source documents to a project and accept the default setting None under Import Styles or Patterns in the Choose Template dialog box, Site Builder applies a default set of ranks in the template to content at translation time: Lowest 1, Title, Lowest 2, Heading 1.

You can complete project setup in Element Setup, where the Ranks tab dialogs lets you view the ranks initially created by Site Builder for the template, as well as the elements Site Builder has associated with these ranks.

In the Ranks tab dialog, you can

- Control the relationship between ranks and the elements assigned to them
- Add new ranks
- Delete unwanted ranks
- Change the properties of ranks
- Change the rank rules

The order of ranks in the Ranks tab dialog is important. Generally, you should not change it. See Rank Order (page 6-35).

The hierarchy and frequency of each rank is summarized in the Properties box on the tab dialog.

Rank Rules

Rank rules dictate how content in your source documents will be treated at translation when Site Builder assigns ranks to identify content hierarchy. They consist of "effects," which represent all possible characteristics of text. For ranking purposes, each effect has the properties "significance" and "order." By changing these, you change the rank rules that govern how Site Builder assigns ranks.

The default settings can be seen in the Rank Rules dialog box (click Advanced on the Advanced tab dialog of **Element Setup**).

Effect	Significance	OK
Hidden	Negative	
Strikethrough	Negative	Cancel
Size	Positive	
Bold	Positive	Help
) ouble Underline	Positive	
Jnderline	Positive	Properties
talic	Positive	
Superscript	Positive	Move <u>U</u> p
Subscript	Positive	
Color	Positive	Move <u>D</u> own
Font	Positive	
Alignment	Positive	Reset

Figure 6-2 Rank rules dialog box

By default, hidden and strikethrough text have "negative" significance so that Site Builder can quickly identify any content associated with these effects in the source documents and place that content at the bottom of its list.

The effects that matter are the "positive" ones, in order. By default, then, when Site Builder applies ranks to source documents at translation, it places text with the largest font size at the highest hierarchical level.

Three effects can be especially important in Site Builder: Color, Font, and Alignment. In addition to significance and order, you can change the properties of these effects in different ways. See Changing the Color Property of a Rank (page 6-39), Changing the Ront Property of a Rank (page 6-38), and Changing the Alignment Property of a Rank (page 6-37).

Rank rules work in conjunction with Rank Properties, in particular, Hierarchy and Frequency.

Rank Properties

Ranks contain properties that can be changed in the Ranks Properties dialog box in Element Setup. You can change the name of a rank and also the element assigned to it. You can also change the hierarchical level of the rank plus the frequency with which the rank appears in the source document. These properties are especially important when creating new ranks to help identify unique content in source documents. You may have to experiment with hierarchy and frequency to successfully identify unique content.

Rank Order

When you add source documents to a project and accept the default setting None under Import Styles or Patterns in the Choose Template dialog box, Site Builder applies a default set of ranks in the template to content at translation time: Lowest 1, Title, Lowest 2, Heading 1.

These ranks are designed to identify content hierarchy in source documents so that toplevel content, in particular, can be handled consistently Site Builder use the following rules:

Rank	Element	Availability	Number of occurrences
Lowest 1	Default Paragraph	Lowest	Greater than 0
Title	Title	Highest	Equals 1
Lowest 2	Default Paragraph	Lowest	Greater than 0
Heading 1	Heading 1	Highest	Greater than 0

Site Builder always looks first for content defined as the "lowest" because, in most instances, this will be your body text. Also, if one of your source documents is a text file, all the text will be in the same font size, and you wouldn't want the text designated Title. What Site Builder identifies as body text will be determined by the rules used to create ranks. See Rank Rules (page 6-33) for more information.

This order is important because ranks are set by Site Builder at translation (styles and patterns, on the other hand, are imported from source documents). So if you changed the order, with Lowest 1 second and Title first, say, you would find Title assigned to all the content in the case of a text file. Likewise, the order is important when you create new ranks and add them to the list in the Ranks tab dialog. See Creating a New Rank (page 6-41).

To review the way Site Builder has assigned the Title and Heading 1 ranks to a specific source document, open the Edit Template dialog box for the template and pass your cursor slowly over the Preview window. A screentip will display the element for each portion of content.

Strictly speaking, Site Builder identifies only a single instance of the highest level content. Even if manual line breaks have been used to spread the title of a source document over two or more lines, Site Builder will treat this "block" of text as a single instance and successfully assign the Title rank to it.

About Ranks

Ranks are an alternative to styles and patterns. They can be particularly useful where the styles of your source documents are inconsistently applied or the documents contain a mixture of named and manually formatted styles.



Tech Tip: Ranks are especially recommended when you are dealing with large numbers of legacy documents or your project contains one or more Directory Items.

When you add a document to a project, None is the default setting under Import Styles or Patterns in the Choose Template dialog box. With this setting, Site Builder ignores any named styles or patterns. Instead, it applies a default set of ranks in the template to content at translation time: Lowest 1, Title, Lowest 2, Heading 1.

The following table shows a simple example of what would happen for two documents with the manually formatted styles shown:

Content	Doc A	Doc B	Rank	Element
Title	Times 20 pt Bold	Arial 16pt Bold	Title	Title
First level Heading	Times 14 pt Italic	Arial 12 pt Bold	Heading 1	Heading 1
Other Heading	Times 12 pt Underscore		Lowest 2	Default Paragraph
Caption		Times 9 pt Bold	Lowest 2	Default Paragraph
Text	Times 10 pt	Times 9 pt	Lowest 1	Default Paragraph

By using patterns, you would end up with nine patterns, where only five are required. So you would have to map some of the patterns to common elements to ensure a consistency of presentation in your Web pages.

In this example, you would have to specifically identify the second-level heading and the caption and map these to their own elements. However, you could immediately format the elements associated with the Title and Heading 1 ranks. And once you create patterns for

"Other Heading" and "Caption," you could also format the Default element so that the Times 10 pt and Times 9 pt text could be handled consistently.

With ranks, Site Builder doesn't recognize the complete variety of content your source documents might contain. But with ranks, Site Builder can

- recognize content that helps define the top-level hierarchy of your source documents and thus successfully format the most important content in your source documents
- eliminate potential problems with clashing styles or patterns or with too many styles or patterns

Note how Site Builder determines which portion of content should be designated. Title, Heading 1, Lowest 1, or Lowest 2 is determined by Rank Rules. You can customize these. See Rank Rules (page 6-33).

Changing the Alignment Property of a Rank

Rank rules dictate how content in your source documents will be treated at translation when Site Builder assigns ranks to identify hierarchy. They consist of "effects," which represent all possible characteristics of text.

If you use ranks a great deal – as opposed to importing styles or patterns from source documents – you may want to change the rank rules, depending on the nature of the content of your source documents. If, say, you use specific alignments in your source documents to differentiate content and define hierarchy, you may want to change the default settings for the Alignment effect.

- 1. On the Ranks tab dialog on **Element Setup**, click **Advanced** to open the Rank Rules dialog box.
- 2. Select the Alignment effect and click Properties.
- 3. Under Significance, be sure that **Has Positive Effect** is selected.
- 4. The Alignments box contains three possible alignments: Right, Center, and Left. To delete any alignment, select the alignment and click **Delete**. To change the order of the alignments, select any alignment and click **Move Up** or **Move Down**.
- 5. To add Justify to the selection of alignments, click **Add** to open the Add Alignment dialog box. Select **Justify** and click **OK**.
- 6. Click **OK** again, to return to the Ranks tab dialog.

If alignment is used consistently in your source documents and can be helpful in creating ranks for special content, you may also want to change the order of the Alignment effect in the Ranks Rules dialog box.

Changing the Association Between a Rank and an Element

You can change the association between a rank and its element. You may want to do this if you have created ranks for two distinct types of content that you now want to format the same way in a body page.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Ranks** to open that tab dialog.
- 3. From the Ranks list, select the rank you want to associate with a different element, and click **Association**.
- 4. In the Change Associations dialog box, select the new element from the drop-down elements list.
- 5. Click OK.

The new element associated with the rank can be seen in the element column opposite the rank name.

Changing the Ront Property of a Rank

Rank rules dictate how content in your source documents will be treated at translation when Site Builder assigns ranks to identify hierarchy. They consist of "effects," which represent all possible characteristics of text.

If you use ranks a great deal – as opposed to importing styles or patterns from source documents – you may want to change the rank rules, depending on the nature of the content of your source documents. If, say, you use specific fonts in your source documents to differentiate content and define hierarchy, you may want to change the default settings of the Font effect.

- 1. On the Ranks tab dialog on **Element Setup**, click **Advanced** to open the Rank Rules dialog box.
- 2. Select the Font effect and click Properties.
- 3. Under Significance, be sure that **Has Positive Effect** is selected.
- 4. Click the Add button to open the Add Font dialog box. From the drop-down list, select the font that you want to become a property of the Font effect, and then click OK. The font name displays in the Font box. If the name of the font used in your source documents is not on the list, type it into the text box.

- 5. Click Add again if you want to add a second font property to the Font effect.
- 6. If you add two or more fonts to the Font effect, you can arrange the order of the fonts by selecting any font and clicking **Move Up** or **Move Down**.
- 7. Click **OK** to return to the Ranks Rules dialog box.



Tech Tip: If fonts are used consistently in your source documents and can be helpful in creating ranks for special content, you may also want to change the order of the Font effect in the Ranks Rules dialog box.

Changing the Color Property of a Rank

Rank rules dictate how content in your source documents will be treated at translation when Site Builder assigns ranks to identify hierarchy. They consist of "effects," which represent all possible characteristics of text.

If you use ranks a great deal – as opposed to importing styles or patterns from source documents – you may want to change the rank rules, depending on the nature of the content of your source documents. If, say, you use color in your source documents to differentiate content and define hierarchy, you may want to change the default settings of the Color effect.

- 1. On the Ranks tab dialog on **Element Setup**, click **Advanced** to open the Rank Rules dialog box.
- 2. Select the Color effect and click Properties.
- 3. Under Significance, be sure that **Has Positive Effect** is selected.
- 4. Click the **Add button** to open the Color dialog box. Select the color you want to become a property of the Color effect, and then click **OK**. A color bar representing that color appears in the Color box. Click **Add** again if you want to add a second color property.
- 5. If you add two or more colors to the Color effect, you can arrange the order of the colors by selecting any color and clicking **Move Up** or **Move Down**.
- 6. Click **OK** to return to the Ranks Rules dialog box.



Tech Tip: If color is used consistently in your source documents and can be helpful in creating ranks for special content, you may also want to change the order of the Color effect in the Ranks Rules dialog box.

Changing the Properties of a Rank

The properties of a rank consist of its name, the element it is associated with, and its hierarchical level and frequency.

When you create ranks to help identify unique content in source documents, hierarchical level and frequency are important properties. Typically, with the Title and Heading 1 ranks successfully assigned, you will want to create additional ranks for additional headings levels and special content.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (
- 2. Click **Ranks** to open that tab dialog.
- 3. From the Ranks list, right-click the rank whose properties you want to change and choose **Properties** from the popup menu (or select the rank and click the **Properties** button).
- 4. If you want to change the rank name, type a new name in the Name text box.
- 5. If you want to change the element associated with the rank, choose another element from the Elements drop-down list.
- 6. Under Hierarchy, select the appropriate radio button. Under Frequency, select the appropriate choice from the drop-down list and enter a value in the text box. See Hierarchy and Frequency of Ranks (page 6-43) for more information.
- 7. Click OK.

Changing the Rank Rules

Rank rules dictate how content in your source documents will be treated at translation time when Site Builder assigns ranks to identify hierarchy. Rank rules consist of "effects," which represent all possible characteristics of text. For ranking purposes, each effect has the properties "significance" and "order." By changing these, you change the rank rules that govern how Site Builder assigns ranks.

If you use ranks a great deal – as opposed to importing styles or patterns from source documents – you may want to change the rank rules, depending on the nature of the content of your source documents. You can change the rules by changing the significance and/or order of each effect.

- 1. On the Ranks tab dialog in **Element Setup**, click **Advanced** to open the Rank Rules dialog box.
- 2. To change the significance of an effect, select the effect and click Properties.

- 3. In the Rank Properties dialog box, change the significance by selecting the appropriate radio button.
 - Has negative effect means that Site Builder will place ranks with this effect at the bottom of its list when it is determining content hierarchy.
 - Has no effect means that the effect is not taken into account by Site Builder at translation when Site Builder determines content hierarchy.
 - Has positive effect means that Site Builder will use this effect to ascertain the ranks for top-level content in source documents.
- 4. Click **OK** to return to the Rank Rules dialog box.
- 5. To change the order of the effect, select the effect and click **Move Up** or **Move Down**, as necessary, to position the effect in the desired order in the list of effects.
- 6. Select another effect and repeat steps 3 to 5.
- 7. Click **OK** to return to the Ranks tab dialog.

The effects Color, Font, and Alignment have additional properties that may be useful in ranking content if your source documents consistently use color, font, or alignment in special ways to define hierarchy. See Changing the Color Property of a Rank (page 6-39), Changing the Ront Property of a Rank (page 6-38), and Changing the Alignment Property of a Rank (page 6-37).

Creating a New Rank

When you add source documents to a project and accept the default setting None under Import Styles or Patterns in the Choose Template dialog box, Site Builder applies a default set of ranks in the template to content at translation time: Lowest 1, Title, Lowest 2, Heading 1. These ranks are designed to identify content hierarchy in source documents so that top-level content, in particular, can be handled consistently.

Follow these steps to complete project setup:

- Check that Site Builder has successfully assigned the Title and Heading 1 ranks to the content. The best way is to open the Edit Template dialog box and pass your cursor over the Preview window. A screentip will display the element associated with each portion of content.
- 2. Review content associated with Default Paragraph and decide how many new ranks you should create in order to identify the different kinds of content in your source documents and maximize your formatting options.

Follow these steps to create a new rank:

- 1. On the Ranks tab dialog of **Element Setup**, click the **New button** to open the New Rank dialog box.
- 2. In the Name text box, type the name you want to use for the new rank. You may care to use a descriptive name such as Intro (if your source document contained, say, introductory text in a specific style).
- 3. Under Associated Element, select an element from the drop-down list or click the **New button** to open the New Element dialog box.
- 4. In the text box, enter the name you want to use for the new element. Typically, you will want to create a new element for each new rank, and to use the same name for the elements as the rank.
- 5. Click **OK** to return to the New Rank dialog box, and **OK** again to return to the Ranks tab dialog.
- 6. Select the new rank from the Ranks list and click **Properties** to open that dialog box. Having given the new rank a name and associated it with a new element, you must now specify its properties.
- 7. Under Hierarchy, select one of the options. Highest Available means Site Builder will create the new rank by identifying content, based on the current rank rules, immediately below the Title and Heading 1 ranks.
- 8. Under Frequency, select the appropriate option from the drop-down list, and in the second text box enter a value. For example, if you were seeking to create a rank for a second-level heading, you would probably select the frequency **Number of** occurrences if greater than and enter the value **0**.
- 9. Click **OK** to return to the Ranks tab dialog.

The rank you create will take effect the next time you translate your project. If you are working in the Edit Template dialog box, Site Builder will do a temporary translation of your source documents as soon as you return there and the new rank should be apparent as soon as you pass your cursor over the Preview window.

If you already know how many elements you will need, you can always create these first. If you do so, they will be available from the drop-down Associated Element list in the New Rank dialog. But they will be "below the line," grayed out, until you select each one and formally associate it with a rank.

Once you create a new rank and associate it with a new element, your next step is to review the rank's properties. (Select the rank in the Ranks tab dialog and click Properties.) Your choice of Hierarchy and Frequency options (see Hierarchy and Frequency of Ranks

on page 6-43) along with Rank rules (see Rank Rules on page 6-33), will determine what content the new rank is associated with.

Hierarchy and Frequency of Ranks

Hierarchy and frequency are two important properties of a rank. When Site Builder creates ranks, it uses these properties, in conjunction with rank rules, to identify unique content in source documents.

Once you create a new rank and associate it with a new element, your next step is to review the rank's properties. (Select the rank in the Ranks tab dialog and click Properties.) Your choice of Hierarchy and Frequency options, along with Rank Rules, will determine what content the new rank is associated with.

In Rank Properties dialog box, you have these hierarchy options:

- Number of occurrences equals—Use when you know the exact number of occurrences of the content you're trying to associate the rank with, and enter that number in the companion text box. This option, with the value 1, is used by Site Builder to create the Title rank when you first add source documents to a project.
- Number of occurrences is fewer than—Use when you want to limit the instances of specific content to the value entered in the companion text box.
- Number of occurrences is greater than—Typically used with a value of 0 in the text box. Three of the four default ranks created by Site Builder have this property.

Remember: these options work in conjunction with the Ranks Rules.

The value for **Number of occurrences equals** should always be set to **1** in order to identify the title. Even if manual line breaks have been used to spread the title of a source document over two or more lines, Site Builder will treat this "block" of text as a single instance and successfully assign the Title rank to it. (This value can be set to **1** for other ranks, too.)

Styles

This section covers the following topics:

- Styles Tab Dialog (page 6-44)
- Style Properties (page 6-44)
- Removing a Style From a Template (page 6-44)
- Creating a New Style (page 6-45)

- About Styles (page 6-46)
- Changing the Association Between a Style and an Element (page 6-46)
- Changing the Properties of a Style (page 6-47)
- Importing New Styles From a Source Document (page 6-47)
- Creating a New Style in Microsoft Excel (page 6-48)
- Styles in Microsoft Excel (page 6-48)
- Styles in Microsoft PowerPoint (page 6-49)
- Working With International Versions of Microsoft Word (page 6-50)

Styles Tab Dialog

When you add a styled document to a project and select Styles in the Choose Template dialog box, Site Builder imports styles from the document and assigns a element to each style. It then places those elements in the template you associate with the document.

Element Setup contains tab dialogs that let you view the imported styles along with the elements assigned to them. In the Styles tab dialog, you can

- Control the relationship between imported styles and the elements assigned to them
- Add new styles
- Delete unwanted styles
- Change the properties of styles

Style Properties

Styles contain properties that can be changed in Styles Properties in Element Setup. On the General tab dialog, you can change the name of a style and also the element assigned to it.

See Changing the Properties of a Style (page 6-47) and Styles (page 6-43).

Removing a Style From a Template

When you add a styled document to a project and select Styles in the Choose Template dialog box, Site Builder imports styles from the document and assigns an element to each style. It then places those elements in the template you associate with the document. You can easily remove a style from a template.

For example, you may be translating revised source documents that no longer contain a certain style. When you remove a style, the element associated with the style remains. You can associate the element with another style or remove the element, too, from the template.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (
- 2. Click **Styles** to open that tab dialog.
- 3. Under Input Style, select the style you want to delete, and click Delete.
- 4. Click OK.

The content associated with that style is now associated with the Default Paragraph element.

Creating a New Style

When you add a styled document to a project and select Styles in the Choose Template dialog box, Site Builder imports styles from the document and assigns an element to each style. It then places those elements in the template you associate with the document.

You can create new styles, if you want. For example, if you later add a new source document that contains a style that isn't in your template, you can create a new style with the same name as the one in the source document. You can create a new element for the style at the same time. Just be sure to accurately name the new style you create.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (1) on the toolbar.
- 2. Click Styles to open that tab dialog, and then click New.
- 3. In the New Style dialog box, type the name of the new style in the text box.
- 4. From the Associated Element drop-down list, select the element to you want to associate with the new style. If necessary, click **New** to create a new element.
- 5. Under Style Type, select **Paragraph** for a paragraph style or **Character** for a character style.
- 6. Click OK.

Typically, you will want to create a paragraph style, since character styles are used for the specialized treatment of text or data within a paragraph.

If you add a new style to a source document after you have added that document to your project, there is an alternative to creating a new style as explained above. You can right-

click that document in the Contents pane of the main window, click **Import**, and then select **Styles**. Any used styles in the source document that are not currently a part of the template will be imported.

About Styles

"Styles" in Site Builder refers to named styles typically found in word processing documents. A named style is a set of formatting characteristics that are saved and given a name so that they can be applied to any paragraph in a document.

When Site Builder translates a styled document, it imports the named styles, automatically generates an element for each style, and saves those elements to the template you choose to associate with the document. It also assigns an HTML tag to each element. You create the look of your Web page by formatting the template and its elements.

If a source document contains the named style Heading 1, Site Builder imports that style and creates an element named Heading 1 and saves it in the template. You format the content of the source document associated with the style Heading 1 by selecting the template, selecting the element Heading 1, and then setting options for that element.

You don't have to change the original style attributes, but you can. You can also use elements to suppress content, place content in reference pages, create text bars, and more.

The default setting in the Choose Template dialog box is None. You have to formally select Styles in order to import styles from a source document. If you don't select Styles at that time, you can always import styles later by right-clicking the source document in the Contents pane and choosing Import and then Styles from the popup menu.

When Site Builder imports styles, it imports only those styles that are used in the source document.

Changing the Association Between a Style and an Element

You can change the association between a style and its element. You may want to do this if, say, you import two similar styles that you want to format the same way in a body page.

- In the Contents pane, select the template you want to edit and click Element Setup () on the toolbar.
- 2. Click **Styles** to open the appropriate tab dialog.
- 3. Depending on which tab dialog you are in, select the style you want to associate with a different element, and click **Association**.

- 4. In the Change Style Associations dialog box, select the new element from the dropdown elements list.
- 5. Click OK.

The new element associated with the style can be seen in the element column opposite the style name.

Changing the Properties of a Style

The properties of a style consist of its name and the element it is associated with. You can change them in Style Properties in Element Setup.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Styles** to open that tab dialog.
- 3. From the Input Style list, right-click the style whose name you want to change and choose **Properties** from the popup menu (or select the style and click the Properties button).
- 4. In the Name text box, type the name for the new style.
- 5. If you want to change the element associated with the style, choose another element from the Elements drop-down list.
- 6. Click OK.

Importing New Styles From a Source Document

When you add a styled document to a project and select Styles in the Choose Template dialog box, Site Builder imports the document's styles, generates an element for each style, and saves those elements to the template you associate with the document. If you later add new styles to a source document, you should re-import the styles from that document.

- 1. In the Contents pane, right-click the source document that contains the new styles.
- 2. From the popup menu that appears, choose Import and then Styles.
- 3. The Progress dialog box displays briefly as the styles in the source document are imported once again. You can check the new styles in **Elements**, and use **Formatting** and the other property sheets to edit the new elements created for the styles.

Creating a New Style in Microsoft Excel

If you want to create a new style in Microsoft Excel, open your spreadsheet in the program and do the following:

- 1. Select a cell that has the combination of formats you want to include in the new style.
- 2. From the Format menu, choose **Style** to open that dialog box.
- 3. In the Style Name text box, type a name for the new style.
- 4. Click OK.

The new style you have created can now be applied to any selected cells in your spreadsheet. It will be saved with the spreadsheet and used to create a new element when the spreadsheet is imported. If the spreadsheet is already part of a project in Site Builder, you can simply open that publication, right-click the spreadsheet in the Contents pane, and choose Import and then Styles.

Styles in Microsoft Excel

When you create Web pages from spreadsheets, note that styles in Microsoft Excel are based on the formatting of the cell. The default styles are:

- Heading 1
- Comma
- ✤ Comma [0]
- Currency
- Currency [0]
- Normal
- Percent

The Heading 1 style represents each worksheet. By default, Site Builder will split a spreadsheet during translation to create a separate HTML file for each worksheet.

Site Builder ships with templates specifically designed for source documents created in Microsoft Excel. The MS Excel template is listed in the Manage Templates dialog box for the default project file. The MS Excel TOC template is available from the drop-down list whenever you add a reference page to a project (assuming you have associated the MS Excel template with your source document).

Styles in Microsoft PowerPoint

When you add a Microsoft PowerPoint presentation to a project, Site Builder imports the styles in the slides that form the presentation. In general, Site Builder translates content relating to the following:

- ✤ Title
- ✤ Body text
- Top-level text objects (the content of text boxes that are not inserted in graphics)

The following table summarizes styles available after a PowerPoint presentation has been added to a project, and shows how the styles are mapped in Site Builder.

Style	Element	Comment
Style	Element	Comment
Automatic Heading	Heading 1	Style created by Site Builder where a slide has no title or heading. It is applied to the title that Site Builder also creates, based on the slide's position in the presentation (e.g., "Slide 7").
Center Title	Heading 1	A PowerPoint style used for the title of a Title slide.
Heading 1	Heading 1	Style created by Site Builder and applied to the title of a regular slide.
Slide	Slide	Style created by Site Builder for all slide images (thus allowing them to be turned on or off in the output Web pages).
Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element
Center Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element
Half Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element

Style	Element	Comment
Quarter Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element
Note 1 to 5	Note 1 to 5	Notes displayed in PowerPoint's "Speaker Notes" view.
Text 1 to 5	Text 1 to 5	Text added by the user (only top-level text objects are translated)
Notes Footer		Ignored by Site Builder
Notes Header		Ignored by Site Builder
Slide Footer		Ignored by Site Builder

Site Builder ships with templates specifically designed for source documents created in Microsoft PowerPoint. The MS PowerPoint template is listed in the Manage Templates dialog box for the default project file. The MS PowerPoint TOC template is available from the drop-down list whenever you add a reference page to a project.

Working With International Versions of Microsoft Word

Microsoft Word contains a default character style that provides the font for the underlying paragraph style of all styles in every template you use. In the English version of Word, Site Builder recognizes this style by name and does not import it.

By ignoring this style, Site Builder lets you address paragraph styles throughout your publication without worrying about the default character style overriding them. (In Site Builder, character elements take precedence over paragraph elements.) So if you want to change the color of a particular heading, for example, you simply select the appropriate element and apply the color you want.

If you are using an international version of Microsoft Word, Site Builder needs to know the name of the default character style so that it can ignore this style. Otherwise, Site Builder will import the style and you will have limited control over paragraph formatting.

Follow these steps to recognize the default character style:

- 1. Click Application Options on the View menu.
- 2. In the text box under Word Processor Default Character Style Name, click the **Add button** to open the Add Default Character Style dialog box. Then type in the name of

the default character style appropriate for the particular international version of Word you are using and click **OK**.

Default Paragraph Font is the name of this style in the English version of Word. If you are not sure of the name of this style in your international version, check the Styles drop-down list in Word (or choose Style from the Format menu to review all styles in use).

3. Click **OK** to return to the main window.

When this is set, Site Builder ignores the default character style as it imports styles from new documents that have been created in Microsoft Word.

This setting is user-specific on a given machine. It applies to all projects run on the machine by the user logged in at the time of the change.

When you add a new default character style, it will be available from the drop-down list in the future, unless you delete it.

If you already have publications that contain the default character style, you can delete the style by opening **Element Setup**, selecting the appropriate element in the Elements tab dialog, and deleting it. You will also have to open the Styles tab dialog to delete the corresponding style (which will now be associated with the Default element). And you will have to delete both the element and style from each template in your project file.

Patterns

This section covers the following topics:

- About Patterns (page 6-52)
- Changing Pattern Properties (page 6-53)
- Changing the Association Between a Pattern and an Element (page 6-53)
- Changing the Name of a Pattern (page 6-54)
- Changing the Order of Patterns (page 6-54)
- Character Patterns (page 6-55)
- Creating a New Pattern (page 6-56)
- Creating a Paragraph Pattern for Figure Numbers (page 6-57)
- Creating a Paragraph Pattern for Graphics in a Source Document (page 6-57)
- Creating a Paragraph Pattern for Numbered Lists (page 6-58)

- Creating a Paragraph Pattern for Bulleted Lists (page 6-59)
- Creating a Paragraph Pattern for Tables (page 6-60)
- Examples of Pattern Matching (page 6-60)
- Font Properties of a Pattern (page 6-61)
- Paragraph Properties of a Pattern (page 6-62)
- Pattern Properties (page 6-63)
- Patterns Tab Dialog (page 6-63)
- Previewing Patterns (page 6-63)
- Removing a Pattern From a Template (page 6-64)
- Text Expression Properties of a Pattern (page 6-65)

About Patterns

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder analyzes the documents for formatting patterns. By identifying such characteristics as typeface, font size, font effects (bold, italic, etc.), and color, Site Builder can separate content in the document into similarly formatted groups, known as patterns.

Site Builder ranks the patterns, first by font size, then by text effects (bold, italic, underline). It associates the element Title with the highest ranking pattern, and the Heading 1 and Heading 2 elements with the next highest rankings. The Default Paragraph element is assigned to all other patterns. It names the patterns Pattern1, Pattern2, etc., in the order in which they appear in the document.

After Site Builder has created this series of patterns for your publication, you'll probably want to rename all the patterns and create some new elements (see Setting Up a Manually Formatted Document on page 6-93). You will then be ready to format the elements associated with these patterns just as you would elements associated with styles.

Site Builder assigns the Title element only if it finds only one instance of the highest ranking pattern in the source document. Otherwise, it will use only the Heading 1, Heading 2 and Default Paragraph elements.

Changing Pattern Properties

Patterns contain a number of properties that can be changed in Pattern Properties in Element Setup.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click Patterns to open that tab dialog.
- 3. From the Pattern list, right-click the name of the pattern you want to change and choose **Properties** from the popup menu (or select the pattern and click the Properties button).
- 4. In the Pattern Properties property sheet, click the appropriate tab to open that tab dialog and make the changes you want.
- 5. Click OK.

Options in the Font, Paragraph, and Text Expression tab dialogs are used for pattern matching when you create new patterns. Should the nature of content in the source document change after you've created a pattern, you can use these options to update the pattern.

Click the Related topics button for topics that explain the tab dialogs in Pattern Properties.

Changing the Association Between a Pattern and an Element

You can change the association between a pattern and its element easily. You may want to do this if you import two similar patterns that you want to format the same way.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. In the Patterns tab dialog, select the pattern you want to associate with a different element, and click **Association**.
- 3. In the Change Pattern Associations dialog box, select the element you now want to associate with the pattern from the drop-down list.
- 4. Click OK.

Changing the Name of a Pattern

Patterns contain a number of properties that can be changed in Pattern Properties in Element Setup.

Once you complete project setup, you might want to change the names of the patterns that Site Builder assigns, and the elements assigned to them, to make it easier to edit the template.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (
- 2. Click **Patterns** to open that tab dialog.
- 3. Right-click the pattern you want to change, and choose **Properties** from the popup menu.
- 4. Click General to open that tab dialog.
- 5. In the Name text box, type in the new name for the pattern.
- 6. To change the element associated with the pattern, select a new element from the Elements drop-down list.
- 7. Click OK.

The General tab dialog also tells you the type of pattern selected (paragraph or character) and the template that contains the pattern. The Description window summarizes the characteristics associated with the pattern, which can be changed in the Font, Paragraph, and Text Expression tab dialogs and viewed in the Preview tab dialog.

Changing the Order of Patterns

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns it identifies in the document and assigns an element to each pattern. It then places those elements in the template you associate with the document.

A list of imported patterns can be viewed in the Patterns tab dialog in Element Setup. Patterns are listed according to their importance (font size, boldness, etc.), but named (Pattern1, Pattern2, etc.) according to the order of their appearance in the source document. Changing the order is simple.

- 1. In the Patterns tab dialog in **Element Setup**, select the pattern you want to move.
- 2. Use the **Move Up** or **Move Down** button, as appropriate, to reposition the selected pattern in the list of Patterns.

Generally, you won't want to change the order of patterns unless you create a new pattern to identify special content in the source document. In that event, the order can be critical to successful pattern matching. In most instances, this won't be an issue, however, because new patterns are added by default to the top of the Pattern list.

Example: Your source document is set entirely in the Normal style. Your body text, including a bulleted list, has been named Pattern4 and assigned to Default Paragraph. You create a new pattern (and element) named List Bullet and use pattern matching to define this pattern. Your new pattern will be automatically placed at the top of the Pattern list, thus,

List Bullet	List Bullet
Pattern4	Default Paragraph

In this example, it's important that List Bullet appears before Pattern4. It doesn't matter where the two patterns appear on the pattern list, as long as List Bullet appears somewhere before Pattern4. In this way, Site Builder will be able to identify the bulleted list first and format it appropriately before formatting all the other patterns that are associated with Default Paragraph.

If you also created a pattern named List Number to identify numbered lists, the order of List Number and List Bullet wouldn't matter, as long as both appear before Default Paragraph. That's because the two patterns are mutually exclusive.

Character Patterns

Character patterns can be used to identify specific characters within a paragraph. This allows you to recognize a word, phrase, or any data within a paragraph, and to control the formatting of just the matched data.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (
- 2. Click **Elements** to open that tab dialog, and then click **New** to open the New Element dialog box.
- 3. In the Name text box, type in the new name, and under Element Type, select **Character**. Then click **OK**.
- 4. Click **Patterns** to open that tab dialog, and then **New** to open the New Pattern dialog box.

- 5. In the Name text box, type in a name for your character pattern, and select the element you created in step 3. Then click **OK**.
- 6. Select the Pattern you have created, and then click Properties.
- 7. In Pattern Properties, set up the properties you would like to use to find content to associate with this pattern.

In matching character patterns, some selections such as Paragraph Alignment and Paragraph Contains a Table (in the Paragraph tab dialog) are not relevant and therefore aren't available. Also, Character Patterns can use only sub expressions, so a Character Pattern such as "FISHING AND BOATING" would not be valid.

Creating a New Pattern

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document and assigns an element to each pattern. It then places those elements in the template you associate with the document. You can create new patterns, if you want.

Site Builder assigns no more than four elements to the content of a manually formatted document. The special element named Default Paragraph is assigned to much of the content. As a result, you might want to use pattern matching to identify specialized content and assign a new pattern name to that content.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Patterns** to open that tab dialog, and then click **New**.
- 3. In the New Pattern dialog box, type the new pattern name in the text box.
- 4. From the Associated Element drop-down list, select the element you want to associate with the new pattern.
- 5. Under Pattern Type, select Paragraph.
- 6. Click OK.

You will probably want to create a new element each time you create a new pattern. And you will probably find it best to use the same name for both the pattern and the element.

Typically, you will want to create a paragraph pattern, since character patterns are used for the specialized treatment of text or data within a paragraph.

Creating a Paragraph Pattern for Figure Numbers

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document and assigns an element to each pattern. It places those elements in the template you associate with the document. Site Builder assigns the elements Title, Heading 1, and Heading 2 to the top three patterns, and the element Default to all other content.

You can use pattern matching to identify and format specific content currently associated with the Default element. Let's say you have a series of figures in your source document and these are numbered Figure 1, Figure 2, etc.

- 1. In the Patterns tab dialog, click New to open the New Pattern dialog box.
- 2. Type **Figure** in the Name text box (or whatever name you want to use), and click the **New** button to open the New Element dialog box.
- 3. Type **Figure** in the Name text box, and click **OK** to return to the New Pattern dialog box.
- 4. Click **OK** to return to the Patterns tab dialog.
- 5. With the new pattern Figure selected, click **Properties** to open Pattern Properties, and then click **Text Expression** to open that tab dialog.
- 6. Under Text Paragraph Position, click Beginning.
- 7. In the Text Expression text box, type the following string between the quotation marks

Figure \d+

The pattern created will also match successfully if the figures in the source document are numbered Figure 1-1, Figure 1-2, etc.

8. Click **OK** to return to the Patterns tab dialog. The Pattern Details box now lists the characteristic you have used to define the figures in your source document. You can now use this element to format this text in **Formatting**. Moreover, you could use this new element to create a List of Figures.

Creating a Paragraph Pattern for Graphics in a Source Document

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document and assigns an element to each pattern. It places those elements in the template you associate with the document. Site Builder assigns the elements Title, Heading 1, and Heading 2 to the top three patterns, and the element Default to all other content.

You can use pattern matching to identify and format specific content currently associated with the Default element. Let's say you want to create a pattern specifically for those paragraphs in the source document that contain graphics. You could then format the new element for this pattern to format the graphics (in the Graphics tab dialog in Formatting).

- 1. In the Patterns tab dialog, click New to open the New Pattern dialog box.
- 2. Type **Graphic** in the Name text box (or whatever name you want to use), and click the New button to open the New Element dialog box.
- 3. Type **Graphic** in the Name text box, and click **OK** to return to the New Pattern dialog box.
- 4. Click **OK** to return to the Patterns tab dialog.
- 5. With the new pattern Graphic selected, click **Properties** to open Pattern Properties, and then click **Paragraph** to open that tab dialog.
- 6. From the Paragraph Contains a Graphic drop-down box, select Yes.
- 7. Click **OK** to return to the Patterns tab dialog. The Pattern Details box now lists the paragraph characteristic you have used to define the new pattern.

If the graphics are associated with the Default Paragraph element, Site Builder will still convert them when you translate the publication. If the graphics are not GIFs, they will be converted to GIFs by default. By assigning a special element to the graphics, however, you increase your formatting options.

Creating a Paragraph Pattern for Numbered Lists

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document and assigns an element to each pattern. It places those elements in the template you associate with the document. Site Builder assigns the elements Title, Heading 1, and Heading 2 to the top three patterns, and the element Default to all other content.

You can use pattern matching to identify and format special content currently associated with the Default element. Let's say you have a numbered list in the source document and have used the same font and font size for the list as for the rest of the source document.

- 1. In the Patterns tab dialog, click New to open the New Pattern dialog box.
- 2. Type **ListNumber** in the Name text box (or whatever name you want to use), and click the **New** button to open the New Element dialog box.
- 3. Type **ListNumber** in the Name text box, and click **OK** to return to the New Pattern dialog box.

- 4. Click **OK** to return to the Patterns tab dialog.
- 5. With the new pattern ListNumber selected, click **Properties** to open Pattern Properties, and then click **Text Expression** to open that tab dialog.
- 6. In the Text Expression text box, type the following string:

"\d+\.[\t|]"

What you have instructed Site Builder to do in its pattern search is look for one or more of any digit (d+), followed by a period (.), followed by a tab or a space (t). The last instruction would cover situations in which some lists have tabs after the numbers while others do not.

7. Click **OK** to return to the Patterns tab dialog. The Pattern Details box now lists the characteristic you have used to define the numbered list in your source document. You can now format the numbered list in the Lists tab dialog in **Formatting**.

Creating a Paragraph Pattern for Bulleted Lists

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document and assigns an element to each pattern. It places those elements in the template you associate with the document. Site Builder assigns the elements Title, Heading 1, and Heading 2 to the top three patterns, and the element Default to all other content.

You can use pattern matching to identify and format specific content currently associated with the Default element. Let's say you have a bulleted list in the source document and have used the same font and font size for the list as the rest of the source document.

- 1. In the Patterns tab dialog, click New to open the New Pattern dialog box.
- 2. Type **ListBullet** in the Name text box (or whatever name you want to use), and click the **New** button to open the New Element dialog box.
- 3. Type **ListBullet** in the Name text box, and click **OK** to return to the New Pattern dialog box.
- 4. Click **OK** to return to the Patterns tab dialog.
- 5. With the new pattern ListBullet selected, click **Properties** to open Pattern Properties, and then click **Text Expression** to open that tab dialog.
- 6. Under Text Paragraph Position, make sure that **Beginning** is selected.
- 7. Place your cursor between the quotation marks in the Text Expression text box and do the following: Click the **Bullet button** and type [\t]].

You could click the Bullet button if in pattern matching it didn't matter what followed the bullet.

8. Click **OK** to return to the Patterns tab dialog. The Pattern Details box now lists the characteristic you have used to define the bulleted list in your source document. You can now format the bulleted list in the Lists tab dialog in **Formatting**.

Creating a Paragraph Pattern for Tables

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document and assigns an element to each pattern. It places those elements in the template you associate with the document. Site Builder assigns the elements Title, Heading 1, and Heading 2 to the top three patterns, and the element Default to all other content.

You can use pattern matching to identify and format specific content currently associated with the Default element.

- 1. In the Patterns tab dialog, click New to open the New Pattern dialog box.
- 2. Type **Table** in the Name text box (or whatever name you want to use), and click the New button to open the New Element dialog box.
- 3. Type **Table** in the Name text box, and click **OK** to return to the New Pattern dialog box.
- 4. Click **OK** to return to the Patterns tab dialog.
- 5. With the new pattern Table selected, click **Properties** to open Pattern Properties, and then click **Paragraph** to open that tab dialog.
- 6. From the Paragraph Contains a Table drop-down box, select Yes.
- 7. Click **OK** to return to the Patterns tab dialog. The Pattern Details box now lists the paragraph characteristic you have used to define the new pattern.

What you have done is select the paragraph immediately preceding the table. In order to format the appearance of a table (in the Tables tab dialog in **Formatting**), you must select the element that immediately precedes the table.

Examples of Pattern Matching

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document, names each pattern, and assigns an element to each pattern. It places those elements in the template you associate with the document. Site Builder assigns the elements Title, Heading 1, and Heading 2 to the top three patterns in the document, and the element Default Paragraph to all other patterns. Since Default may be assigned to most of the content of the source document, the first thing you will probably want to do is create new elements for those patterns assigned to Default Paragraph.

You may also need to create new elements for the other content not specifically identified in the source document. That way, you will have more formatting options when you edit the template. You do this by using pattern matching to identify the content. The patterns you create can be paragraph or character.

Following are some examples of pattern matching.

- Creating a Paragraph Pattern for Graphics in a Source Document (page 6-57)
- Creating a Paragraph Pattern for Tables (page 6-60)
- Creating a Paragraph Pattern for Numbered Lists (page 6-58)
- Creating a Paragraph Pattern for Bulleted Lists (page 6-59)
- Creating a Paragraph Pattern for Figure Numbers (page 6-57)

Several of the templates that ship with Site Builder contain three default character patterns: HTTP, WWW, and Email (the element names are HTTP, Weblink, and Email, respectively). Each contains HTML code to ensure that any character strings in the source documents that begin with the protocol **http**, the **www** designation that signifies a link to the Web, or the **Mailto:** link for electronic mail, will be automatically activated in the output pages that Site Builder creates.

Font Properties of a Pattern

Patterns contain a number of properties that can be changed in the series of tab dialogs in Pattern Properties in Element Setup. In the Patterns tab dialog you select the pattern you want to change or define, and click Properties to open Pattern Properties.

The Font tab dialog lets you use characteristics of the text in the source document to match patterns.

The drop-down boxes for Bold, Italic, etc., have three settings. Yes means a pattern match will occur only if content contains this characteristic. No means it will occur only if content does not contain this characteristic. And N/A means that matching will be successful whether or not this characteristic is present.

You can also choose a type face, font size, and font color for matching purposes.
 Clearing any of these boxes means that pattern matching will be successful regardless of the value for that characteristic.

If you choose any of these font characteristics in matching a paragraph pattern, it must apply to the entire paragraph. If you choose any in matching a character pattern, the entire character string must contain the characteristic.

Paragraph Properties of a Pattern

Patterns contain a number of properties that can be changed in the series of tab dialogs in Pattern Properties in Element Setup. In the Patterns tab dialog you select the pattern you want to change or define, and click Properties to open Pattern Properties.

The Paragraph tab dialog lets you identify paragraphs that contain graphics or tables, and also by their alignment. Each paragraph contains drop-down boxes (for a graphic, a table, and alignment), which have three settings.

- Graphic: Yes means that pattern matching will be successful only if a paragraph in the source document contains a graphic. No means that pattern matching will be successful only if the content does not contain a graphic. N/A means that pattern matching will be successful whether or not this characteristic is present. This option is useful when you want to create a new pattern for all paragraphs containing graphics so you can format the graphics consistently (in the Graphics tab dialog in Formatting).
- Tables: Yes means that pattern matching will be successful only if a paragraph in the source document contains a table. No means that pattern matching will be successful only if the content does not contain a table. N/A means that pattern matching will be successful whether or not this characteristic is present. Here, you are actually identifying the paragraph that precedes the table, because it is the element associated with that style that must be selected in the Tables tab dialog in Formatting if you want to format the appearance of a table.
- Alignment: Here, pattern matching will be successful only if the paragraph has the alignment selected: Left, Center, or Right. N/A means that pattern matching will be successful whether or not this characteristic is present. This option might be useful, for example, if you want to create a pattern for a particular heading that is centered on the page. You would combine the Center option with specific font settings in the Font tab dialog.

Pattern Properties

Patterns contain a number of properties that can be changed in Pattern Properties in Element Setup. See Changing Pattern Properties (page 6-53).

- In the General tab dialog you can change the name of a pattern and also the element assigned to the pattern.
- The Font tab dialog is used in pattern matching to help identify portions of text by the font used, the font size and color, and character attributes such as bold and italic.
- The Paragraph tab dialog is used in pattern matching to identify paragraphs containing graphics or tables, as well as by their alignment.
- In the Text Expression tab dialog you can modify the text expression property settings for the current pattern and check syntax for pattern matching.
- The Preview tab dialog allows you to preview the content of your source document that matches the pattern, as you change properties and test patterns.

Patterns Tab Dialog

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns it identifies in the document and assigns an element to each pattern. It then places those elements in the template you associate with the document.

Element Setup contains tab dialogs that let you view the imported patterns along with the elements assigned to them. In the Patterns tab dialog, you can

- Control the relationship between imported patterns and the elements assigned to them
- Add new patterns
- Delete unwanted patterns
- Change the properties of patterns

Previewing Patterns

Patterns contain a number of properties that can be changed in Pattern Properties in Element Setup.

In the Preview tab dialog you can see which paragraphs the selected pattern matches to.

1. In the Patterns tab dialog, right-click the pattern you want to preview and choose **Properties** from the popup menu.

- 2. Click **Preview** to open that tab dialog.
- 3. Click Change Preview to open that dialog box.
- 4. Choose one of the documents associated with the current template, and click OK.

When you return to the Preview tab dialog, the first instance of the pattern in the selected document will appear in the Preview window. You can use the Previous and Next buttons to scroll back and forth to preview every instance of the pattern in the document. A tally of the number of "hits" is displayed in the upper right of the dialog box.

If nothing appears in the Preview window the document currently being previewed contains no examples of the pattern being matched.

Removing a Pattern From a Template

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns that it identifies in the document and assigns an element to each pattern. It then places those elements in the template you associate with the document. Site Builder assigns the elements Title, Heading 1, and Heading 2 to the top three patterns in the document, and Default to all the others.

You may decide to remove a pattern, either during project setup (if you decide to format two or more patterns the same way) or later (if a revised source document no longer contains paragraph or text formatting of a particular nature).

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (
- 2. Click **Patterns** to open that tab dialog.
- 3. From the Pattern column, select the pattern you want to delete and click **Delete**.

The selected pattern is removed from the template.

4. Click OK.

When you remove a pattern, Site Builder automatically re-associates the content with another element. In most cases, this will be Default Paragraph. But the content may be associated with the next pattern lower on the pattern list, instead.

For example, if you delete an element associated with Pattern4, 11 pt Arial Bold Italic, and the template also contains Pattern5, 11 pt Arial Bold, the content associated with Pattern4 would then be associated with Pattern5.

Text Expression Properties of a Pattern

Patterns contain a number of properties that can be changed in the series of tab dialogs in Pattern Properties in Element Setup. In the Patterns tab dialog you select the pattern you want to change or define, and click Properties to open Pattern Properties.

In the Text Expression tab dialog you can modify text expression settings, which allow you to match paragraphs (or text strings for character elements) based on their content instead of their formatting. You can match content at the beginning or end of a paragraph, or anywhere in a paragraph, by using the appropriate radio button under Text Paragraph Position.

The Text Expression edit box allows you to edit the string you want to match. You can use the Check button to parse and validate the string to ensure that it has proper syntax for pattern matching.

	Quotation marks – every expression must be surrounded by quotation marks to denote the start and end of an expression
<>	Can be used to nest expressions
AND	Used to command that both sub expressions be found
OR	Used to command that either sub expression be found
NOT	Used to command that a sub expression not be found

Expression Operators

Sub Expression Operators

[]	Allows you to express a character range; for example, from the digits zero to nine, use [0-9]
()	Allows you to nest sub expressions
	Used to set an OR expression within a sub expression
?	Look for zero or one of the previous – used to express when only one more of the previous expression may exist

+	Look for one or more of the previous – used to express when more than one of the previous expression definitely exists
*	Look for zero or more of the previous – used to express when more of the previous expression may exist

Common Character Definitions

These are used to match certain characters:

	Use to find any character
[0-9]	Use to find any digit
[A-Z]	Use to find any uppercase character in the English alphabet.
[a-z]	Use to find any lowercase character in the English alphabet
[A-Za-z]	Use to find any uppercase or lowercase character in the English alphabet
Bullet	Use to find any bullet character. Bullets are frequently ANSI characters 0149 or 0183. The characters inserted represent these ANSI values.
Tab	Use to find any tab character. The representation of a tab character is the result of an ANSI value insertion.

Text Combinations

The following four text combinations can also be used:

\d	Use to find any digit
\u	Use to find any uppercase character
\1	Use to find any lowercase character
\t	Use to find a tab

Another character that can be used is the caret, which represents any character but the one that follows it. For example [^] would represent any character except a space.

The backslash is used as an escape character. If you need to match characters that are used in the search syntax, such as the quotation marks or parentheses, place a backslash before each.

Metadata

This section covers the following topics:

- ✤ A Metadata Strategy (page 6-67)
- About Metadata (page 6-69)
- Applying the Hierarchy of Metadata (page 6-70)
- Content Server Metadata (page 6-73)
- Creating New Metadata (page 6-74)
- List of Standard Metadata (page 6-76)
- Metadata Options (page 6-77)
- Making a Metadata Element-Based (page 6-78)
- Publishing Metadata to a Content Server (page 6-79)
- The Hierarchy of Metadata (page 6-81)
- Using Custom Tags for New Metadata (page 6-82)
- Changing the Association Between a Metadata and an Element (page 6-82)
- Standard and Custom Metadata (page 6-83)
- Changing the Properties of Metadata (page 6-84)
- Metadata Tab Dialog (page 6-85)
- Ordering Metadata (page 6-86)
- Removing Metadata From a Template (page 6-87)

A Metadata Strategy

In handling metadata, you are essentially trying to do two things:

- Place the metadata in your Web output, to be visible in your Web pages and/or to facilitate searches for information on your Web server
- Place the metadata in your content server, to facilitate searches there

Placing metadata in your Web output is straightforward. Once you make the metadata element-based (see Making a Metadata Element-Based on page 6-78), you can treat the metadata like any other content in . That is, you can place the metadata in your Web pages (see Placing an Element in Your Web Pages on page 6-26) and also promote the metadata to reference pages (as you would any other element). You can also place the metadata in Meta tags (see Placing an Element in a Meta Tag on page 6-25) to facilitate searches of your Web site.

The key to placing metadata in your content server is to coordinate how you inherit metadata from source (when you set staging and publishing options) with how you publish element-based metadata in Element Setup.

- When you stage or publish your project, metadata for each output page is placed in one or more of the metadata fields that exist in the content server. (See Content Server Metadata on page 6-73 for more information.)
- No matter the type of metadata (content server, standard, or custom) or the source of the metadata (a content server or the file system), the metadata must be assigned to one of these fields.
- Content server metadata is recognized by default when you inherit. That is, if your project contains no element-based metadata, the metadata used to stage or publish your project will be the metadata used to check the original source documents into Content Server (assuming it has been selected in Inheritance Settings on page 8-51).
- You can assign any metadata to any field (e.g., you could place Author in the Comments field), and different metadata to the same field. But this is unlikely to be useful. Conversely, if you want to publish Keywords metadata , say, you will likely want to create a custom metadata field named Keywords in your content server.
- For each output page that is staged or published, Content Server will accept only one instance of metadata for a given metadata field. As a result, if you have published element-based metadata, that metadata may compete with content server metadata. Site Builder uses a hierarchy of metadata (see The Hierarchy of Metadata on page 6-81) to determine which metadata will be associated with the staged or published output.

When Site Builder inherits from source, it applies the hierarchy to all non-empty metadata fields in the source documents. Say you publish the standard metadata Author to override the content server metadata Author. If a particular source document has no standard metadata for Author, Site Builder will inherit the content server metadata for that document, instead.

 If you are staging or publishing to a content server other than the one used for source documents, you will likely want the metadata fields to be set up the same way on both content servers.

You can only stage or publish metadata that exists. If you have used a set procedure for checking source documents in Content Server, it should be easy to control the metadata that is associated with your source documents. To determine what standard or custom metadata is also associated with those documents, you may have to examine the properties of individual files.

Metadata is not element-based by default (except for the standard metadata Keywords, which is included in most templates that ship with Site Builder). You must make metadata element-based (see Making a Metadata Element-Based on page 6-78) in order to place the metadata in your Web pages and in the Meta tags of those pages.

Once metadata becomes element-based, it can also be published to the content server in the Element Properties tab dialog of **Element Setup** (see Publishing Metadata to a Content Server on page 6-79). When you publish element-based metadata, you are making it available for inheritance. What is actually inherited will depend on a number of things, including the hierarchy of metadata that Site Builder uses.

When Site Builder inherits from source, it applies the hierarchy to all non-empty metadata fields in the source documents. Say you publish the standard metadata Author to override the content server metadata Author. If a particular source document has no standard metadata for Author, Site Builder will inherit the content server metadata for that document, instead.

About Metadata

Metadata is simply "data about data." In addition to content, the typical source document has a title, author, and other information that is associated with the document and can be used in different ways. In Site Builder, document information, content information, document properties, property values, and security settings are all metadata.

Site Builder recognizes three types of metadata:

- Content server metadata— information you apply to a source document when you check the document into a content server. (See Content Server Metadata on page 6-73 for more information.)
- Standard metadata—properties automatically generated by the application that was used to create the source document.

Custom metadata—special properties you create in the application for the source document.

Not every source document has standard or custom metadata. (See Standard and Custom Metadata on page 6-83 for more information.)

Content server metadata is used to check source documents, as well as staged and published output, into Content Server. All three types of metadata can be used to:

- Improve the usability of your Web site by being placed in Web pages and also the Meta tags of those Web pages, to facilitate information searches on your site.
- Improve the usability of your content server by being published to the content server, to facilitate the indexing and categorization of content.

You must make metadata element-based (see Making a Metadata Element-Based on page 6-78) in order to place the metadata in your Web pages and in Meta tags. Once element-based, standard and custom metadata can be published to a content server (see Publishing Metadata to a Content Server on page 6-79). (When you inherit document information (see Inheriting Document Information From Source on page 8-50), content server metadata is automatically recognized, so it doesn't have to be element-based.

When different types of metadata are inherited from source, content server metadata may clash with standard and custom metadata. Site Builder uses a hierarchy of metadata (see The Hierarchy of Metadata on page 6-81) to determine which metadata is to be given preference during staging and publishing.

Whatever metadata you plan to use must exist in, or be associated with, the source documents if Site Builder is to successfully place that metadata in your Web output or in the content server.

The properties (standard metadata) of a source document may not accurately describe the document. For example, if you create a new document by making a copy of an existing one, the new document may inherit the properties of the existing one.

Applying the Hierarchy of Metadata

Following are five simple examples to show how Site Builder associates metadata with Web output in the content server when it stages or publishes a project. (See A Metadata Strategy on page 6-67 for more information on how Site Builder inherits metadata from source.)

Example 1

- In the Word source document, John Doe is the property for Author. Jane Doe checks the document into Content Server. The document is then added to a project. When the project is staged, a third author -- Jack Frost -- is selected in the document information that is specified for all output pages in the project.
- What metadata do we have? Three authors defined by two different types of metadata: John Doe = standard metadata, Jane Doe = content server metadata (for the source document), and Jack Frost = content server metadata (for check-in purposes for the Web output). All the metadata are non-element-based.
- What metadata will be used? In this simple instance, Jack Frost is the author who will be associated with all Web output. The two other types of metadata are irrelevant because you're not inheriting from source. So if you were searching by author for the output Web page in your content server, you would use Jack Frost.

Example 2

- The same as Example 1, except that this time, when the project is staged, document information is specified only for those output pages (frames, reference pages, etc.) that do not originate in a content server or the file system. For the body pages, metadata (including Author) is inherited from source.
- What metadata do we have? Still three authors defined by two different types of metadata.
- What metadata will be used? This time, two metadata will be used by Site Builder when it checks the staged output into the content server. Jack Frost again will be used, but this time only for frames, reference pages, etc. For body pages, Site Builder will recognize Jane Doe because you selected Author in Inheritance Settings and the content server Author is inherited by default in the absence of any element-based standard metadata Author being published.

Example 3

- Let's say that in Example 2 you also associate the John Doe standard metadata with an element and publish that element to the content server as "Author."
- What metadata do we have? Still three authors, defined by two different types of metadata. But one metadata -- John Doe -- is now element-based and has been published to the content server.

What metadata will be used? When Site Builder inherits metadata during staging, it will recognize John Doe rather than Jane Doe, because you have made the standard metadata Author element-based and published it to the content server. Jack Frost will still be used for the other output pages (frames, reference pages, etc.).

Example 4

- Let's say that in Example 3, you now make the Jane Doe content server metadata element-based. In addition, we'll call the original file that was checked into the content server Word1, and add a second file, Word2, to our project. John Doe is also the standard metadata Author for this second file, which resides on the file system. Oh, one other thing. When we order the metadata in the Metadata tab dialog of Element Setup, we place content server metadata Author (i.e., Jane Doe) before standard metadata Author (i.e., John Doe).
- What metadata do we have? Still three authors, now defined by three different types of metadata. John Doe = a standard element-based metadata, Jane Doe = a content server element-based metadata, and Jack Frost = content server metadata.
- What metadata will be used? For both Word1 and Word2, Jack Frost will once again be used to check frames, reference pages, etc. into the content server. For Word1 (the source document in the content server), Jane Doe will be used for the output body pages. That's because while both the content server metadata Author (Jane Doe) and standard metadata Author (John Doe) are now both element-based, the content server metadata is listed before the standard metadata in Element Setup. For Word2 (the source document in the file system), John Doe will be used because there is no content server metadata competing with the standard metadata in this instance.

What's key in Example 4 is that the content server metadata is listed before the standard metadata in Element Setup. (See Ordering Metadata on page 6-86 for more information.) Had the standard metadata been listed first, it would have overridden the content server metadata, and John Doe would have been inherited from both Word1 and Word2.

The following, unrelated example reinforces the issues covered in Example 4.

Example 5

Let's say that your project contains source documents from both the file system and a content server. Ideally, you want to inherit the content server metadata Author from those documents. In the case of documents on the file system, however, you can't do that and you're prepared to inherit the standard metadata Author, instead. There are several options.

- If you set Inheritance Settings and select Author -- and do nothing else -- you will inherit only the content server metadata Author -- and therefore will inherit Author only from the source documents in the content server. (Output pages generated from the source documents in the file system will be checked into the content server with the document information that was specified. See Specifying Document Information (page 8-49).)
- If you then make the standard metadata Author element-based and publish it to the Author metadata field in the content server, you will inherit only the standard metadata Author -- from both sets of source documents (in the content server and on the file system). That's because element-based metadata always overrides content server metadata (see The Hierarchy of Metadata on page 6-81).
- However, if you also make the content server metadata Author element-based, publish it to the content server, and list it before the standard metadata Author in the list of elements in Element Setup -- then you will have the best of both worlds. That is, Content Publisher will inherit the content server metadata Author from documents in the content server and will inherit the standard metadata Author from documents on the file system.

Content Server Metadata

Site Builder recognizes different types of metadata: content server, standard and custom (see Standard and Custom Metadata on page 6-83). Content server metadata is the document information that you assign when you check a file into Content Server. At a minimum, you must assign Type, Author, and Security Group to each file.

Like standard and custom metadata, content server metadata can be associated with elements and placed in your Web output (in your body and reference pages, as well as in Meta tags to facilitate searches on your Web site). It can also be inherited from the source documents when you stage or publish your project.

Following are the metadata used by Content Server, which can be applied to all new documents checked into the content server and also inherited from source.

of the output files can be inherited hat generated them. Specify which	∑ OK Cancel <u>H</u> elp

Figure 6-3 Metadata used by Content Server

If you plan to use metadata in your publications, you should experiment to see what is possible, especially if you have source documents of different types associated with the same template.

The field caption "Account" was previously named "Document Account." You can still use "Document Account" (any projects that already use this field caption will still run fine). Likewise, you can still use "Document Author," "Document Title," and "Document Type."

Creating New Metadata

When you start a new project and add source documents to your publication, Site Builder can import styles or patterns from those documents or create a default set of ranks instead. But it does not automatically import metadata.

To include metadata from source documents in your Web pages, you must first "create" the metadata you want to use and associate it with an element. You must then decide how you want to include the metadata in your publication. (See Placing an Element in Your Web Pages on page 6-26.) If including metadata from the repository, you must also set publish option properties for the element.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Metadata** to open that tab dialog, and then click the **New** button to open the New Metadata dialog box.
- 3. Select Standard, Custom or Repository:
 - If you select Standard, choose from the drop-down list the specific type of metadata you want to create for your publication. See Metadata Options (page 6-77).
 - If you select Custom, enter the name of the custom metadata you created for your source document.
 - If you select Repository, enter the property name (such as "Document Author") or the user interface name (such as dDocAuthor) of the metadata that is contained in the content server. Property names must contain quotes. Do not enter quotes if you enter the user interface name.
- 4. Click the **New** button to open the New Element dialog box. It is always best to create a new element for each metadata you create.
- 5. In the Name text box, type the name you want to use for the metadata. Typically, using the name of the metadata itself will simplify identification of the metadata.
- 6. Click **OK** to return to the New Metadata dialog box, and **OK** again. The new metadata is now listed in the Metadata tab dialog.
- 7. Click **Elements** to switch to that tab dialog. The new element for the metadata has been added to the list of elements.
- 8. If you are adding repository-based metadata, select the new element and click Properties. Click Publish to open that tab dialog. Select Publish this element, and enter the property name or user interface name that matches the content server in the Publish as text box. The name entered here should match the name entered in the New Metadata dialog box (see step 3). Place all user property names in quotes (such as "Document Author"). Enter the user interface name without quotes.

What metadata is actually included in your publication will depend on what is available from your content server or from your source documents. See Metadata Options (page 6-77).

By default, the metadata you have created will be included in the Meta tag in the <HEAD> of the output HTML for your publication. You can also include metadata in the body pages and/or page TOC to display with content.

It is usually best to create a new element for each metadata you create. Be careful if you use Title from the standard drop-down list. Your document may already have a Title element (based on an imported style). In that case, you may want to name the new element for that metadata Title (Meta).

To find the formal name of a repository-based metadata, go to the Staging or Publishing Options dialog box and select the **Browse** button opposite pages. Click **Inheritance Settings** to open the Inherited Document Information dialog box, which displays the property and user interface metadata names that are available in the content server.

List of Standard Metadata

The following list summarizes all standard metadata recognized by Site Builder. Not all metadata are available for every source document. Some of the following will appear only in Word files, others in PowerPoint files, and so on. Some source documents contain no standard metadata at all.

See Standard and Custom Metadata (page 6-83) for a list of applications that can create standard and custom metadata.

These metadata can be selected from the Standard drop-down list when you make a metadata element-based (see Making a Metadata Element-Based on page 6-78).

Title	Number of characters	From
Author	Number of words	Reply to
Subject	Edit time	Number of revisions
Keywords	Number of bytes	Version
Creation date	Number of lines	Last author
Modification date	Number of paragraphs	Account
Description	Number of slides	Category
Comments	Number of notes	Presentation target
Time	Number of hidden slides	Scale or crop
Manager	Number of sounds or video clips	Links up to date

Company name	То	Characters (with spaces)
Number of pages	CC	

When you make a standard metadata element-based, the metadata isn't necessarily available from your source documents. You should experiment to see what is possible, especially if you have source documents of different types associated with the same template.

Metadata Options

Site Builder lets you include metadata from source documents or the content server in your Web publications. In the New Metadata dialog box you can select the specific form of metadata you want to use from the Standard drop-down list, specify custom metadata, or enter repository-based metadata instead.

When you are including metadata from source documents using the standard or custom option, keep in mind the new metadata you create isn't necessarily available from your source documents. If you plan to use metadata in your publications, you should experiment to see what is possible, especially if you have source documents of different types associated with the same template.

The standard and custom metadata available will vary with different types of source documents and, in some instances, with the version of the application used to create the source documents.

Standard metadata may vary. For Microsoft Word, Microsoft Excel, and Microsoft PowerPoint, information in the Summary and Statistics tab dialogs of the Document Properties dialog box may be available: For the other applications, only metadata from the Summary tab dialog may be available.

Custom metadata is available only from those applications indicated in the table.

Metadata as defined in Document Properties may differ from actual metadata for a document. This could happen if you create a new document by copying an existing one, for example. In that event, the new document may inherit the properties of the existing one.

	Standard	Custom
Word 97/2000/2002	٠	٠

	Standard	Custom
Excel 97/2000/2002	٠	٠
PowerPoint 97/2000/2002	٠	٠
Ami Pro	٠	
Word Pro	٠	
Word versions 2, 6	٠	
Excel	٠	
RTF	٠	
Corel WordPerfect	٠	

Repository-based metadata applies to all source documents, if the information exists in the content server.

Any repository-based metadata you specify must exist in the content server. The metadata does not need to exist in source documents. If the content server contains the metadata, you can apply the repository-based metadata to all of your output files. Any repository-based metadata you set takes precedence over standard and custom metadata settings. (See Inheriting Document Information From Source on page 8-50 for more information.)

Making a Metadata Element-Based

Metadata in source documents isn't automatically included in your Web publication. (The standard metadata Keywords was created specially for the templates that ship with Site Builder). To place a metadata in your Web pages and in the Meta tags of the HTML files, you must formally associate the metadata with an element.

The metadata itself must exist in the source document (in the case of standard or custom metadata) or in the content server (in the case of content server metadata). The metadata you create will apply to all source documents associated with the template you edit.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (
- 2. Click **Metadata** to open that tab dialog, and then click the **New** button to open the New Metadata dialog box.

- 3. Select Standard, Custom or Repository.
 - If you select Standard, select the specific type of metadata from the drop-down list as used in the source document. See Standard and Custom Metadata (page 6-83) and also List of Standard Metadata (page 6-76).
 - If you select Custom, enter the name of the custom metadata you created for your source document.
 - If you select Repository (for content server metadata), enter the field caption or field name as assigned to the source documents in the content server. Use quotes for the field caption ("Author") but not for the field name (dDocAuthor). See Content Server Metadata (page 6-73) and Inheritance Settings (page 8-51).
- 4. Under Associated element, click the **New** button to open the New Element dialog box. It is always best to create a new element for each metadata you create.
- 5. In the Name text box, type the name you want to use for the metadata. Typically, using the name of the metadata itself will simplify identification of the metadata.
- 6. Click **OK** to return to the New Metadata dialog box, and **OK** again. The new metadata is now listed in the Metadata tab dialog.
- 7. Click **Elements** to switch to that tab dialog. The new element for the metadata has been added to the list of elements.
- 8. Click **OK** to return to the main window.

By default, any new metadata is placed in the Meta tag (see Placing an Element in a Meta Tag on page 6-25) of the Head of the output HTML file. You can also place metadata in your Web pages (see Placing an Element in Your Web Pages on page 6-26) and promote them to the reference pages of your Web output.

Which metadata are actually included in your publication will depend on what is available in your source documents or the content server. See Content Server Metadata (page 6-73) and Standard and Custom Metadata (page 6-83).

It is usually best to create a new element for each metadata you create. But be careful if you use Title from the Standard drop-down list. Your document may already have a Title element (based on an imported style). In that case, you may want to name the new element for metadata "Title (Meta)," say.

Publishing Metadata to a Content Server

When you set staging and publishing options, you must specify certain document information in order to check Web output into the content server. This metadata—Type, Author, and Security Group (and any other metadata you've specified as required)—is the

minimum needed for check-in, and is always used for those output pages (frames, reference pages, etc.) that do not originate in a content server or the file system. For output body pages, you can inherit metadata from source, instead.

When you inherit from source, Site Builder gives preference to content server metadata by default. To inherit such metadata, simply select the metadata in Inheritance Settings (page 8-51) when you set staging and publishing options. If you also want to inherit standard and custom metadata, you must associate the metadata with elements and formally publish those elements to the content server.

If you inherit both content server metadata and standard and custom metadata, some metadata may clash. Site Builder uses a hierarchy of metadata (see The Hierarchy of Metadata on page 6-81) to determine which metadata will be given preference when you stage or publish your output. (See A Metadata Strategy on page 6-67.)

- 1. If you have not already done so, create a new metadata, associate it with an element, and select where you would like the element to display. See Making a metadata element-based for instructions.
- 2. In Elements tab dialog, select the new element, click **Properties**, and then click **Publish**.
- 3. In the Publish tab dialog, select **Publish this element**.
- 4. In the **Publish as** text box, enter the name of the metadata field in the content server that you want to publish to. Enter either the field caption or field name as it is used in the content server. Use quotes for field captions (such as "Author"), but not for field names (such as dDocAuthor). See Content Server Metadata (page 6-73) for a list of the default field captions and names.

For standard and custom metadata, you will likely want to use the metadata name for publishing purposes. To do so, however, you will have to create a metadata field in the content server with that name.

5. Click **OK**, and **OK** again to return to the main window.

When you inherit from source, you should, at the very least, select Type, Author, and Security Group in Inheritance Settings, unless you want to use the specified document information, instead (see Specifying Document Information on page 8-49).

There's generally no need to publish element-based content server metadata, since by default Site Builder gives preference to this type of metadata when you inherit from source. (All you have to do is select the appropriate metadata in Inheritance Settings on page 8-51 when you set staging and publishing options). However, see Examples 4 and 5 in Applying the Hierarchy of Metadata (page 6-70).

If the metadata name changes in the content server, you may need to change the name in the Publish As text box to reflect this. You may also need to change the metadata name entered in Metadata Properties to ensure that the template contains the correct metadata name (see Changing the Properties of Metadata on page 6-84).

When Site Builder inherits from source, it applies the hierarchy to all non-empty metadata fields in the source documents. Say you publish the standard metadata Author to override the content server metadata Author. If a particular source document has no standard metadata for Author, Site Builder will inherit the content server metadata for that document, instead.

The Hierarchy of Metadata

Key metadata (Type, Author, and Security Group) are used to check Web output into Content Server. In other, more powerful uses, a broader range of metadata can help to improve the usability of your Web output and facilitate the search for information on both your Web server and content server.

There are different types and sources of metadata. Moreover, element-based metadata can be published to a content server (see Publishing Metadata to a Content Server on page 6-79). However, when Web output is staged or published, Content Server can accept only a single instance of metadata for a particular metadata field for each output page that is checked into the content server.

As a result, when you inherit from source during staging and publishing, you may have "competing" metadata. Site Builder uses a hierarchy to determine which metadata will take precedence and be applied to the staged or published output. (In other words, when you publish element-based metadata to a content server, you're simply making it available for inheritance.)

When Site Builder stages or publishes a project, it recognizes metadata in the following order:

- ✤ 1: Metadata associated with elements
- ✤ 2: Metadata direct from the source in Content Server
- 3: Metadata (document information) that you specified when you set staging and publishing options

By default, when Site Builder inherits metadata from source, it inherits content server metadata. Once you start publishing element-based metadata, however, content server metadata may clash with standard or custom metadata.

The optimum strategy for any project will depend on the nature and location of your source documents, the types of metadata associated with them, and what you're ideally trying to accomplish. See A Metadata Strategy (page 6-67) for more information.

When Site Builder inherits from source, it applies the hierarchy to all non-empty metadata fields in the source documents. Say you publish the standard metadata Author to override the content server metadata Author. If a particular source document has no standard metadata for Author, Site Builder will inherit the content server metadata for that document, instead.

Using Custom Tags for New Metadata

When you create new metadata to be included in the Head of the HTML output of your publication, by default Site Builder places the metadata in Meta tags. You can use custom tags, instead, if you want.

- 1. In the Elements tab dialog, select the new element that your metadata is associated with, and then click **Properties** to open the Element Properties dialog box.
- 2. Click Meta Tag to open that tab dialog.
- 3. Select **Use custom tags**, and then click **Use custom tag before metadata**. Enter the opening custom tag you want to use in the text box. For example, you might enter <TITLE> here.
- 4. Click **Use custom tag after metadata** and enter the closing tag. You might enter </TITLE> here.
- 5. Click **OK**, and **OK** again.

You cannot have two title tags in your HTML output. So if, in the above example, you used the Title tag as your custom tag, you would want to turn off titles in the Titles tab dialog of Globals.

Changing the Association Between a Metadata and an Element

You can change the association between a metadata and its element at any time.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click Metadata to open that tab dialog.
- 3. Select the metadata you want to associate with a different element, and click **Association**.

- 4. In the Change Associations dialog box, select the new element from the drop-down list.
- 5. Click **OK**. The new element associated with the metadata can be seen in the Elements column, opposite the metadata name.
- 6. Click **OK** to return to the main window.

You can also enter the Metadata Properties dialog box and change the element there. If you want to change just the name of the element, open the Elements tab dialog, select the element, and click Properties. Then change the name in the Element Properties dialog box.

Standard and Custom Metadata

Site Builder recognizes different types of metadata: content server (see Content Server Metadata on page 6-73), standard and custom. Standard and custom metadata originate in the source document, with the application used to create it.

Like content server metadata, standard and custom metadata can be associated with elements and placed in your Web output in your body and reference pages, as well as in Meta tags to facilitate searches on your Web site. (It can also be inherited from the source documents when you stage or publish your project.)

See List of Standard Metadata (page 6-76) for a summary of the standard metadata recognized by Site Builder. You can create element-based standard metadata using the metadata names listed there. The table below shows the type of metadata available from certain applications.

	Standard	Custom
Word 97/2000/2002	٠	٠
Excel 97/2000/2002	٠	•
PowerPoint 97/2000/2002	٠	•
Ami Pro	٠	
Word Pro	٠	
Word versions 2, 6	٠	
Excel	٠	

	Standard	Custom
RTF	٠	
Corel WordPerfect	٠	

- The metadata names you use in Site Builder should be the same as those used in your source documents.
- The metadata available will vary with different types of source documents and, in some instances, with the version of the application used to create the source documents.
- Standard metadata may vary between applications. For Microsoft Word, Microsoft Excel, and Microsoft PowerPoint, information in the Summary and Statistics tab dialogs of the Document Properties dialog box may be available. For the other applications, only metadata from the Summary tab dialog may be available.
- Metadata as defined in Document Properties may differ from actual metadata for a document. This could happen if you create a new document by copying an existing one, for example. In that event, the new document may inherit the properties of the existing one.
- Custom metadata is available only from those applications indicated in the table.
- In order to inherit standard and custom metadata from source documents, you must make the metadata element-based (see Making a Metadata Element-Based on page 6-78) and formally publish the metadata to the content server (see Publishing Metadata to a Content Server on page 6-79) This makes the metadata available for inheritance.
- When Site Builder inherits from source, content server metadata may clash with standard or custom metadata. Site Builder uses a hierarchy of metadata (see The Hierarchy of Metadata on page 6-81) to determine what metadata will be associated with the staged or published output.
- If the source documents are on the file system, only standard and custom metadata can be inherited. (See Inheriting Document Information From Source on page 8-50.)

Changing the Properties of Metadata

The properties of a metadata in Site Builder are the name of the metadata and the element associated with the metadata.

After you create the name of a standard metadata, you cannot change it. But you can change the name of a custom or content server metadata. (Of course, you must be careful how you create a metadata name in the first place. See Making a Metadata Element-Based on page 6-78.) In all cases, you can always change the element associated with the metadata.

- 1. In the Contents pane, select the template that contains the metadata you want to modify.
- 2. Click **Element Setup** (**I**) on the toolbar, and then click **Metadata** to open that tab dialog.
- 3. Select the metadata you want to modify and click **Properties** to open the Metadata Properties dialog box.
- 4. Change the name of the metadata, if you want, assuming it is a custom or repositorybased metadata.
- 5. If you want to associate another element with the metadata, select the element from the drop-down list.

If you want to create a new element for the metadata, you will have to do so before you enter the Metadata Properties dialog box. In that event, when you select the new element from the Element drop down list in the Metadata Properties dialog box, you will find it grayed out, below the line.

6. Click **OK**, and **OK** again.

The element you associate with metadata has its own properties. To view these, open the Elements tab dialog, select the element, and then click **Properties**.

If you change the name of a content server metadata, the new name (like the original) must be one of the recognized metadata fields (see Content Server Metadata on page 6-73). You will also need to update the **Publish as** name in the **Publish** tab dialog of Element properties (the two names should be the same).

Metadata Tab Dialog

The Metadata tab dialog is one of five tab dialogs in the Element Setup property sheet, where you organize your templates initially in terms of ranks, styles, and patterns, and then elements.

With elements for ranks, styles, and patterns, you can format the content of your Web pages, promote content to reference pages, create navigation links, and so forth.

While Site Builder can import styles or patterns from source documents, or create a default set of ranks instead, it doesn't automatically recognize metadata in source documents. That's why (except for the Keywords metadata) the Metadata tab dialog is empty when you start a new project.

Once you make a metadata element-based (see Making a Metadata Element-Based on page 6-78), it is automatically included in the Meta tag of the head of your output HTML files. It can also be placed in your Web output in the body page and page TOC (see Placing an Element in Your Web Pages on page 6-26), as well as promoted to reference pages (just like any other element) and published to a content server (see Publishing Metadata to a Content Server on page 6-79).

Ordering Metadata

The order in which metadata appear in the Metadata tab dialog of Element Setup determines the order in which the metadata appear in your Web pages and in the Meta tags of your HTML files. It may also determine which metadata Site Builder publishes to Content Server.

You can use drag-and-drop to move any metadata up or down the list.

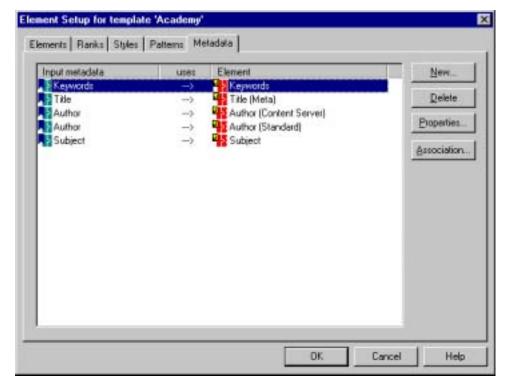


Figure 6-4 Element setup dialog

The Metadata tab dialog (above) shows all the element-based metadata for a given template of a project. If all of the metadata shown have been placed in Meta tags and included in the body pages and/or page TOCs, the metadata for the source documents associated with the template will appear in the corresponding output pages in the order shown.

All of the metadata shown will also be published to the content server, assuming that you have formally published the metadata (see Publishing Metadata to a Content Server on page 6-79) in the Publish tab dialog of the Metadata dialog box of **Element Setup**. The metadata will then be available for inheritance from the source documents.

Note there are two metadata named Author on the list. However, Content Server will accept only one instance of a given metadata field when you stage or publish a project.

Site Builder initially uses a hierarchy of metadata (see The Hierarchy of Metadata on page 6-81) to determine which metadata are to be associated with staged and published output. In this case, Site Builder will recognize the two element-based metadata for Author -- and will use the content server metadata because it is listed before the standard metadata Author.

Removing Metadata From a Template

When you add a source document to a publication, its metadata isn't automatically associated with elements in the template. You have to make each metadata element-based (see Making a Metadata Element-Based on page 6-78) in order to place the metadata in the Meta tag of your output HTML files and in the Web pages themselves. Any metadata you create can easily be removed from a template.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (**1**) on the toolbar.
- 2. Click Metadata to open that tab dialog.
- 3. Select the metadata you want to remove and click **Delete**. You have now removed the metadata from your template. However, the element you created specifically for the metadata is still in your template.
- 4. Click **Elements** to switch to that tab dialog. The element associated with the metadata you deleted is now grayed out, below the line, to denote it is no longer being used in the template. If you no longer want the element as part of the template, select the element and click **Delete**.
- 5. Click **OK** to return to the main window.

Elements and HTML tags

This section covers the following topics:

- Adding Custom Tags Before and After an Element (page 6-88)
- Changing the HTML Tag Assigned to an Element (page 6-89)
- ✤ About HTML Tags (page 6-89)

Adding Custom Tags Before and After an Element

Elements contain a number of properties you can change in Element Properties in Element Setup.

One property is the HTML tag assigned to an element. Site Builder assigns heading tags to elements that have heading styles associated with them, and the paragraph tag to all other elements. You can change these assignments, if you want. One option is to use custom tags.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (**1**) on the toolbar.
- 2. Click **Elements** to open that tab dialog.
- 3. Select the element you want to change and click Properties.
- 4. Click **HTML Tags** to open that tab dialog.
- 5. Under Use Custom Tags, click **Use custom tag before content**, and in the text box enter the HTML tag you want to place before the element.
- 6. Click **Use custom tag after content**, and in the text box enter the HTML tag you want to place after the element.

Example If you use the <marquee> tag (Internet Explorer only), the content associated with the tag will move slowly across the screen when displayed. The

 tag (in Netscape Navigator) will cause the content to blink on and off while your Web page is displayed.

7. Click OK.

If you want to remove the carriage return before each paragraph for the content associated with a particular element, click the **Remove aesthetic formatting before custom tags** check box. This option might be especially useful where you are including JavaScript in your code.

Changing the HTML Tag Assigned to an Element

Elements contain a number of properties you can change in Element Properties in Element Setup.

One property is the HTML tag assigned to an element. Site Builder assigns heading tags to elements that have heading styles associated with them, and the paragraph tag to all other elements. You can change these assignments, if you want.

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** (1) on the toolbar.
- 2. Click **Elements** to open that tab dialog.
- 3. Right-click the element for the assignment you want to change, and choose **Properties** from the popup menu.
- 4. Click HTML Tag to open that tab dialog.
- 5. Under Standard Tags, the HTML tag assigned by default to the selected element displays in the Tag text box. Select another tag from the drop-down list or type the new tag in the text box.
- 6. Click OK.
- 7. Repeat steps 3 to 6 to assign new HTML tags to other elements you want to change.

You can assign custom tags instead of using standard HTML tags. See Adding Custom Tags Before and After an Element (page 6-88).

About HTML Tags

Site Builder automatically assigns HTML tags to elements, which represent the ranks, styles, and patterns in your source documents and are used to define the look of your content in HTML format. You can change the default assignments, if you want. Here are some of the standard HTML tags defined by the industry that Site Builder uses.

HTML Tag	"Extension"	Explanation
address block	<address></address>	To set off the address of the Web site sponsor.
block quote	<blockquote></blockquote>	To set off long quotations or citations.
line break	 	Forces a line break in text flow.

HTML Tag	"Extension"	Explanation
definition	<dd></dd>	Definition for a term in a glossary list.
division	<div></div>	To set off different kinds of containers (say, chapter, section, abstract, or appendix).
term	<dt></dt>	Descriptive part of a definition entry.
heading 1 through heading 6	<h1> through <h6></h6></h1>	First-level heading through sixth-level heading.
list header	<lh></lh>	Marks a heading of a list.
list item		Marks a member item within a list of any kind.
no tag		Used when content is not assigned to any tag.
note	<note></note>	For admonishments (say, a Caution or Warning).
paragraph	<p></p>	Breaks up text into spaced regions.
preformatted	<pre></pre>	Renders text using a fixed font and treats white space characters literally.

Styles in Source Documents

This section covers the following topics:

- Importing Source Documents That Share Styles (page 6-91)
- Import Conflicts (page 6-91)
- Resolving Import Conflicts Between Styles and Patterns (page 6-92)

- Setting Up a Manually Formatted Document (page 6-93)
- Splitting a Source Document Into Several Web Pages (page 6-95)
- Using Hard Page Breaks to Create Multiple Output Pages (page 6-96)

Importing Source Documents That Share Styles

If you add several documents to a publication and the documents share a common set of named styles, a problem may arise if some of the styles have the same names but different attributes.

When Site Builder imports the styles of those documents, the style attributes of the first document translated will prevail throughout the publication (that is, to all documents that share the same template). In other words, the styles in the document that is listed highest in the Contents pane -- and is therefore highest in the translation order -- will prevail.

You might want to change the translation order to place a particular document first for translation purposes. But if you plan to format the shared styles extensively in Site Builder, the differences in attributes may not matter.

This is relevant only if you are passing through formatting characteristics "from source," which is the default setting for most elements throughout Site Builder.

Import Conflicts

Conflicts can occur between patterns and styles because patterns take precedence over styles. In the event of a conflict, the formatting associated with a particular style may be ignored when you translate a publication. And unless you carefully review the formatting of your publication after translation, you may not be aware that this has happened.

Because of potential conflicts, you will receive an error message whenever you add a styled document to a publication containing manually formatted documents or add a manually formatted document to a publication containing only styled documents. In fact, a conflict may arise even if you've create a single pattern in an otherwise styled document and later add another styled document to the publication.

If you receive an "Import Conflict" error message when importing a document, you can still go ahead and import the document. What matters is that you then resolve the conflict so that when you later translate the publication, you don't find that certain styles in your styled documents are being overridden by patterns.

There are two possible ways to resolve conflicts. In a simple situation, you may be able to remap a pattern or a style to another element if you know where the potential conflicts will

occur. Alternatively, you may have to create two identical templates and use one only for styled documents and the other only for manually formatted documents.

Resolving Import Conflicts Between Styles and Patterns

When a project consists solely of styled or manually formatted source documents, you have a great deal of flexibility in how you associate templates with the documents and how you edit the elements in those templates. When you combine a styled document with a manually formatted one in the same template, however, conflicts can occur.

In fact, conflicts can occur when you,

- Try to import a manually formatted document and associate it with a template that contains only styles (from styled documents)
- Try to import a styled document and associate it with a template that contains only patterns (from manually formatted documents)
- Create a paragraph pattern in a template that contains styles and later add a styled document to the template.

In short, a conflict can arise when you combine patterns with styles in the same template. That's because patterns always take precedence over styles. Say you have a template containing only patterns, and one of those patterns is named Heading 1. In that event, the formatting associated with that pattern will be applied to any content that matches that pattern's attributes, even if the content is styled "List," for instance.

There are two solutions, depending on whether the source of potential conflicts can be easily identified or is widespread.

Problem 1

You've created a paragraph pattern in a template containing only styles. The pattern is used to identify bulleted lists, which don't have a unique style. A conflict could arise if you later import a styled document that has bulleted lists with a unique style assigned to them and you want to format the two types of bulleted lists differently.

Solution 1

Let's say you named the pattern (and the element) for bulleted lists in the original document Pattern Bullet, and that the style (and element) associated with bulleted lists in the new document is Style Bullet. Thus,

Style / Pattern	Element
Pattern Bullet	Pattern Bullet
Style Bullet	Style Bullet

Map either the Pattern Bullet pattern to the Style Bullet element, or the Style Bullet style to the Pattern Bullet element. See Changing the Association Between a Pattern and an Element (page 6-53) or Changing the Association Between a Style and an Element (page 6-46).

This will work only if the pattern is looking for formatting (in this case, a unique bullet) that doesn't appear elsewhere in the source documents.

Problem 2

Your project contains many source documents. All the documents are styled but you know that, from time to time, you'll want to import a manually formatted document. (Alternatively, your documents are all manually formatted and you may be importing a styled document in future.)

Solution 2

Since you can't anticipate all the styles or patterns that will come into play in your publication, the simplest solution is to create two identical templates and always use one template for all documents containing styles and the other for all documents containing patterns. This means,

- Creating a new template for the styled document you import into a publication containing patterns (or vice versa)
- Editing only one of the two templates, but periodically replacing the dated template with a new template based on the one that is being continually updated.

To create a new template based on another, see Copying a Template (page 6-4).

Setting Up a Manually Formatted Document

When you add a manually formatted document to a project and select Patterns in the Choose Template dialog box, Site Builder imports patterns it identifies in the document and assigns an element to each pattern. It then places those elements in the template you associate with the document.

No matter how many patterns there are in the document, Site Builder associates, at most, only four elements with the patterns: Title, Heading 1, Heading 2, and Default Paragraph. (It assigns Title only if the top pattern appears only once in the document.)

Initial Setup

In the Patterns tab dialog of Element Setup, the patterns are listed in their order of importance but named in their order of appearance in the document. So when you first enter the Patterns tab dialog to review the patterns imported, you might find something like this,

Pattern	Element
Pattern1	Title
Pattern2	Heading 1
Pattern4	Heading 2
Pattern3	Default Paragraph
Pattern5	Default Paragraph
Pattern6	Default Paragraph

Setup Task

As part of project setup, you might want to do the following:

- ✤ Rename all patterns.
- Create new elements for those patterns associated with Default Paragraph. (Generally, it is best to use the same names for elements as for the styles or patterns.)

In this way, you will create the equivalent of a styled document and should find it easier to relate the elements you are formatting to the content of the source documents.

Revised Setup

In the above example, you might end up with the following:

Pattern	Element
Title	Title
Heading 1	Heading 1
Heading 2	Heading 2
Heading 3	Heading 3
Body Text	Body Text
List Bullet	List Bullet

To learn more about naming patterns and creating new elements, see,

- Changing the Name of a Pattern (page 6-54)
- Creating a New Element (page 6-21)

Splitting a Source Document Into Several Web Pages

Elements contain a number of properties you can change in Element Properties in Element Setup.

The Split property lets you split a long source document into a series of smaller Web pages to simplify navigation and facilitate downloading. Each Web page becomes a separate HTML file in the process.

To split a source document into several Web pages

- 1. In the Contents pane, select the template you want to edit and click **Element Setup** () on the toolbar.
- 2. Click **Elements** to open that tab dialog.
- 3. From the Elements list, select the element you want to use to split the source document.

Right-click the red cross in the Split column opposite the element and choose the green tick mark from the popup menu that appears. (You can also click **Properties** and in the Split tab dialog click the **Split the source document into multiple output pages** check box.)

When Site Builder splits a source document, it starts the second Web page with the second instance of the element. It creates a new Web page for each instance of the element after that. To split a document beginning with the first instance of the element, clear the appropriate check box in the Options tab dialog of **Globals**.

In addition to or instead of splitting on an element, you can use hard page breaks to create multiple output pages (see Using Hard Page Breaks to Create Multiple Output Pages on page 6-96).

Using Hard Page Breaks to Create Multiple Output Pages

As an alternative to splitting a source document on an element (see Splitting a Source Document Into Several Web Pages on page 6-95), you can use the hard page breaks of your source document to create multiple output pages.

- 1. In the main window, select the template associated with the source documents you want to edit and click Element Setup () on the toolbar to open the Element Setup property sheet.
- 2. On the Elements tab dialog, click **Split the source document into multiple output pages at each hard page break.**
- 3. Click OK.

When you translate your source document, Site Builder will create a new Web page for each hard page break in each source document associated with the template.

FORMATTING

This section covers the following topics:

- Formatting (page 6-97)
- Captions (page 6-98)
- Paragraphs (page 6-100)
- Style Sheets (page 6-107)
- ✤ Tables (page 6-113)
- ✤ Lists (page 6-119)
- ✤ Graphics (page 6-123)
- Background (page 6-126)

- Associating HTML or Scripting Code With an Element (page 6-127)
- Text Effects (page 6-128)
- Visual Aids (page 6-130)

Formatting

Formatting is one of four property sheets used to edit templates. Once you set up a project, you use the property sheets to complete settings for each template. The settings determine the look and behavior of a Web page created from any source document associated with the template.

In **Formatting**, most of the work is done in the Character and Paragraph tab dialogs, where you decide how text will display in a Web browser.

Among the many options in Formatting are the ability to

- Handle the special challenges posed by tables and lists
- Add graphical aids to set off content and reinforce document hierarchy
- Select conversion options for graphics in source documents
- Associate HTML code with elements

Once you select a template for editing, you can open Formatting by

- Clicking Formatting () on the toolbar, or
- Opening the Edit Template dialog box and clicking the Formatting button.

In the Edit Template dialog box, you can move between the four property sheets and use them in any order. And you can check your changes in the Preview window as you make them. Also, as you pass your cursor over the content of the Preview window, a screentip will display the name of each element.

The Character and Paragraph tab dialogs have different options available, depending on whether CSS (cascading style sheets) is turned on or off in **Globals**. See Cascading Style Sheets (CSS) (page 6-107).

Captions

This section covers the following topics:

- Promoting Captions to a Reference Page (page 6-98)
- Promoting the Captions of Graphics (page 6-98)
- Promoting the Captions of Tables (page 6-99)

Promoting Captions to a Reference Page

If your source documents contain tables or graphics with captions, you can promote the captions to a reference page and link directly to the tables or graphics from the reference page.

Since such links are to the top of the table or graphic in the Web pages you create, this feature is especially useful where source documents contain captions following the tables or graphics.

See:

- Promoting the Captions of Graphics (page 6-98)
- Promoting the Captions of Tables (page 6-99)

You can also create alternative text from a caption (see Creating Alternative Text From a Caption on page 5-35).

Promoting the Captions of Graphics

If your source documents contain graphics with captions, you can promote the captions to a reference page and link directly to the graphics from the reference page.

Because such links are to the top of the graphics in the Web pages you create, this feature is especially useful where source documents contain captions following the graphics.

Use this procedure to promote captions to a reference page:

- 1. In **Formatting**, from the Elements list, select the element associated with the graphics in your source documents, and click **Graphics** to open that tab dialog.
- 2. Under Captions, click **Use caption** and then click the **Caption** button to open the Captions dialog box.
- 3. Under Caption source, select **Before the graphic** or **After the graphic**, depending on where the content should be taken from in the source document.

Site Builder uses the content immediately before or after the graphic. It doesn't matter whether the content is a true caption or whether it is associated with a unique element. Site Builder will promote whatever that content is.

4. Under Promote, click **Promote this caption with the following name**, and enter a name in the text box below. You should give the caption a unique name.

With the name, you create an element for promotion. It isn't included in the template for the body page you are promoting from, but it will be listed in the template for any reference page you add to your project (except for the Index). You must formally include the caption in the body of that reference page.

5. Click **OK** to return to the Graphics tab dialog.

After you include the promoted caption in reference page, Site Builder will automatically link the caption to the top of the graphic in the body page. In addition, it will use the contents of the caption as the alternative text for the image. (Alternative text is the text that appears in a popup window when the cursor is held over the image.)

Promoting the Captions of Tables

If your source documents contain tables with captions, you can promote the captions to a reference page and link directly to the tables from the reference page.



Tech Tip: Because such links are to the top of the tables in the Web pages you create, this feature is especially useful where source documents contain captions following the tables.

To promote captions to a reference page:

- 1. In **Formatting**, from the Elements list, select the element for the style immediately before the table in the source document. Then click **Tables** to open that tab dialog.
- 2. Under Captions, click **Use caption** and then click the **Caption** button to open the Captions dialog box.
- 3. Under Caption source, select **Before the table** or **After the table**, depending on where the content should be taken from in the source document.

Site Builder uses the content immediately before or after the table. It doesn't matter whether the content is a true caption or whether it is associated with a unique element. Site Builder will promote whatever that content is.

4. Under Promote, click **Promote this caption with the following name**, and enter a name in the text box below. You should give the caption a unique name.

With the name, you create an element for promotion. It isn't included in the template for the body page you are promoting from, but it will be listed in the template for any reference page you add to your project (except for the Index). You must formally include the caption in the body of that reference page.

5. Click **OK** to return to the Tables tab dialog.

After you include the promoted caption in a reference page, Site Builder will automatically link the caption to the top of the table in the body page. In addition, it will add the caption to the output page, centered immediately below the table.

Because Site Builder adds the caption to the table in the output page, you will end up with two captions. If you have a unique element associated with the original caption in the source document, you can choose not to include the caption generated from the source document in the translated output. That way, you will only see one caption — the one Site Builder creates for the output page.

If you have graphics and tables in the same source documents, and you want to eliminate the table captions from the body content (per note 2), you will need to be able to associate different elements with the table and graphics captions.

Paragraphs

This section covers the following topics:

- Adding Padding to Paragraphs (page 6-100)
- Setting Advanced Options for Paragraphs (page 6-101)
- Setting Paragraph Borders (page 6-102)
- Indents, Margins, Borders, and Padding (page 6-103)
- Setting First-Line Indentation (page 6-104)
- Setting Paragraph Margins (page 6-105)
- Setting Line Height (page 6-106)
- Setting Paragraph Width (page 6-106)

Adding Padding to Paragraphs

Among the options available for formatting paragraphs with CSS turned on is the addition of padding to paragraphs. Padding typically is added when you set borders, and is the amount of space between the border and actual content.

See Indents, Margins, Borders, and Padding (page 6-103) for more information on how these options relate to each other.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (**1**) on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements that you want to set padding for. The padding you add will apply to all paragraphs associated with these elements.
- 3. Under Advanced, click the **Advanced** button. A Caution dialog box may open to remind you that support for the different features in the Advanced section may vary between browsers. Click **OK**.
- 4. Click **Borders** to switch to that tab dialog. Then click the **Padding** button under Padding to open the Padding dialog box. It doesn't matter which tab you have selected on the Borders tab dialog when you do this.
- 5. In the Padding dialog box, select the tab for the border you want to set padding for: Left, Top, Right, Bottom. You can set padding for any one, any two or three, or all four borders. You can also apply the settings of any one border to all borders by simply clicking the Set All button.
- 6. Under Left, click **Set left padding**. Enter a value in the first text box and select the unit of measure from the drop-down list: points, inches, centimeters, or pixels. Repeat these steps to set padding for Top, Right, or Bottom.
- 7. If you want any setting in the Padding dialog to apply to all other settings, click **Set All** in the appropriate panel.

Setting Advanced Options for Paragraphs

The Paragraph tab dialog in **Formatting** is used to set options for paragraphs such as alignment, first line indentation, and spacing. (You format text in the Character tab dialog.) The options available vary significantly, depending on whether CSS is turned on or off. See Cascading Style Sheets (CSS) (page 6-107).

With CSS turned on, there are a number of additional settings available. Under Advanced, you can set the following:

- Line height—See Setting Line Height (page 6-106).
- Background color—See Setting a Background Color (page 6-126).
- Background image—See Setting a Background Image (page 6-126).
- First line indent—See Setting First-Line Indentation (page 6-104).
- Borders—Setting Paragraph Borders (page 6-102).

Paragraph width—Setting Paragraph Width (page 6-106).

Setting Paragraph Borders

Among the options available for formatting paragraphs with CSS turned on is the setting of borders for paragraphs. Borders are different from indentation, margins, and padding. With those three, you inject space between the edge of your screen or frame and the content. With borders, you can inject a rule of varying form, thickness, and color.

See Indents, Margins, Borders, and Padding (page 6-103) for more information on how these options relate to each other.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (**____**) on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements that you want to set borders for. The indentation you set will be used for all paragraphs associated with these elements.
- 3. Under Advanced, click the **Advanced** button. A Caution dialog box may open to remind you that support for the different features in the Advanced section may vary between browsers. Click **OK**.
- 4. Click Borders to switch to that tab dialog. Select the tab for the border you want to set: Left, Top, Right, Bottom. You can set a border for one, any two or three, or all four. You can also apply the settings of one tab to all the others by clicking the Apply these settings to all sides button.
- 5. For the selected tab, under Size, select Take from source, Don't specify, or Set to.

Take From Source means that Site Builder uses what is in the source document. Don't Specify means the Web browser used to view the Web page may substitute its own default settings. With the Set To option, you can specify the size of the border you want to use.

- 6. If under Size you select **Set to**, enter a value in the first text box and select a unit of measure from the second: points, inches, centimeters, or pixels.
- Under Style, select Take from source, Don't specify, or Use this style. If you select Use this style, select the style of border you want to use from the drop-down list.
- 8. Under Color, select Take from source, Don't specify, or Use this color. If you select Use this color, click the color button to open the Color dialog box and choose a color for the border there.

9. To add Padding, click the **Padding button**. See Adding Padding to Paragraphs (page 6-100).

Indents, Margins, Borders, and Padding

When you format source documents with CSS (cascading style sheets) turned on, you enjoy a great deal of flexibility in setting indents, margins, borders, and padding for your template. See Cascading Style Sheets (CSS) (page 6-107).

The illustration below shows how these formatting options relate to each other.

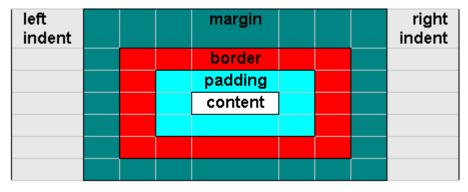


Figure 6-5 Formatting options

- Indent—Can be set left and right only. Creates space that represents the distance between the edge of the frame and content. (Set in the Paragraph tab dialog of Formatting.)
- margin—Can be set top, bottom, left and right. Creates space that represents the distance between the indent (or frame, for top and bottom) and the border. (Click the Margins button in the Paragraph tab dialog of Formatting.)
- border—Can be set top, bottom, left and right. A visual effect that represents the distance between the margin and padding. (Click the Advanced button in the Paragraph tab dialog of Formatting.)
- padding—Can be set top, bottom, left and right. Represents the distance between the border and content. If you assign a background color or image to an element, the color or image will apply both to the content associated with the element and any padding you have set. (Click the Padding button on the Borders tab dialog of the Advanced dialog box.)

All these settings are zero by default. If all are zero except, say, padding, then padding would represent the distance between the frame and content. And so on.

If you set a horizontal margin for a frame in the Frame Properties dialog box, any indent will be measured from that horizontal margin.

You can set a first-line indent for any element that is negative. If, at the same time, zero is the setting for indents, margins, borders, and padding, then you will lose the beginning of the line in your the Web page (unless you set a sufficient margin in the Frame Properties dialog box.)

Setting First-Line Indentation

Among the options available for formatting paragraphs with CSS turned on is setting the indentation for the first line of text in each paragraph of text. It is often helpful to set off paragraphs from each other by using a different indentation for the first line. This can be positive or negative. If you set negative indentation, you in effect create a hanging paragraph after the first line.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (**____**) on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements that you want to set a first line of indentation for. The indentation set will be used for all paragraphs associated with these elements.
- 3. Under Advanced, click the **Advanced** button. A Caution dialog box may open to remind you that support for the different features in the Advanced section may vary between browsers. Click **OK**.
- 4. Under First Line Indent, on the General tab dialog, select **Take from source**, **No indent**, or **Set to**.

Take From Source means that Site Builder uses what is in the source document. Don't Specify means the Web browser used to view the Web page may substitute its own default settings. With the Set To option, you can control the line indentation precisely.

- 5. If you select **Set to**, in the first text box select the units for the indent. In the second, select the unit of measure: points, inches, or centimeters. You can set a negative value if you want to create a hanging indent.
- 6. Click OK.

If you set a negative value for the indent (step 5), be sure to create sufficient space with either indent, margins, borders, or padding. Otherwise, part of the first line of your paragraph may not be visible. See Indents, Margins, Borders, and Padding (page 6-103).

Setting Paragraph Margins

Among the options available for formatting paragraphs with CSS turned on is the setting of margins. The margin is simply the distance between the edge of the screen and where text begins. If the text is within a frame, then it is the distance from the edge of the frame to text.

See Indents, Margins, Borders, and Padding (page 6-103) for more information on how these options relate to each other.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (**I**) on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements associated with the content you want to set line height for.
- 3. Under Margins, click the Margins button to open that dialog box.
- 4. Set the margin for Left, Top, Right and Bottom, as appropriate. In each case, select Take from source, Don't specify, or Set to.

Take From Source means that Site Builder uses what is in the source document. Don't Specify means the Web browser used to view the Web page may substitute its own default settings.

5. If you select **Set to**, enter a value in the first text box (or use the Up/Down controls to set the value) and from the second, drop-down list, choose a unit of measure: points, inches, centimeters, or pixels.

If you want to apply the same margin for Left, Top, Right, and Bottom, complete the settings for just one of the four panels and click Set All.

6. Click **OK** to return to the Paragraph tab dialog.

Verify your results carefully when setting margins. Top and bottom margins aren't handled with uniformly by all browsers.

If you have created a frameset and already set a margin for a frame in the frameset, any margin you create for the paragraphs that display in that frame will be in addition to the frame margin.

If you apply a top and/or bottom margin, you will increase the space between all paragraphs associated with the element you have formatted.

Setting Line Height

Among the options available for formatting paragraphs with CSS turned on is the setting of line height. Line height is the height that a line of text occupies, from its base line to the base line of the line above or below.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (**I**) on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements associated with the content you want to set line height for.
- 3. Under Advanced, click the **Advanced button**. A Caution dialog box opens to remind you that support for the different features in the Advanced section may vary between browsers. Click **OK**.
- 4. Under Line Height, on the General tab dialog, select **Take from source, Don't specify**, or **Set to**.

Take From Source means that Site Builder uses what is in the source document. Don't Specify means the Web browser used to view the Web page may substitute its own default settings. With the Set To option, you can control the line height precisely.

- 5. If you select **Set to**, enter a value for the number of units and select a unit of measure: points, inches, centimeters, or pixels. The line height you set will be used for all lines in paragraphs associated with the element you are editing.
- 6. Click **OK** to return to the Paragraph tab dialog.

Line height should be set in conjunction with font size. You shouldn't set a line height of 12 points if your font size is 20 points unless you intentionally want lines of text to overlap.

Setting Paragraph Width

Among the options available for formatting paragraphs with CSS turned on is setting paragraph width.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements that you want to set paragraph width for. The width will be used for all paragraphs associated with these elements.

- 3. Under Advanced, click the **Advanced** button. A Caution dialog box may open to remind you that support for the different features in the Advanced section may vary between browsers. Click **OK**.
- 4. In the Advanced Settings dialog box, click Width to open that tab dialog.
- 5. Under Content Width, select **Don't specify** or **Set to**.

Don't Specify means the Web browser used to view the Web page may substitute its own default settings. With the Set To option, you can control the width of paragraphs precisely.

- 6. If you select **Set to**, in the first text box select a value for the width. In the second, select the unit of measure: points, inches, centimeters, pixels, or percent. Click **OK** to return to **Formatting**.
- 7. Click OK.

How text displays in a Web publication will also be affected by the use of other features. See Indents, Margins, Borders, and Padding (page 6-103). How browsers display paragraph width onscreen and print pages with this CSS setting may vary significantly.

Style Sheets

This section covers the following topics:

- Cascading Style Sheets (CSS) (page 6-107)
- Formatting Characters With CSS (page 6-108)
- Formatting Characters Without CSS (page 6-110)
- Formatting Paragraphs With CSS (page 6-111)
- Formatting Paragraphs Without CSS (page 6-112)

Cascading Style Sheets (CSS)

Site Builder implements CSS (cascading style sheets) by means of embedded, inline styles, which you create mostly in the Character and Paragraph tab dialogs of Formatting.

- Since CSS is template-based, you turn CSS on or off for each template in your project.
- Some templates already have CSS turned on those with "CSS" in their name (see the Manage Templates dialog box).
- As you create the template, you can turn on CSS in the New Template dialog box.

- Settings affected by CSS are in the Character and Paragraph tab dialogs of Formatting. These include settings in the Table Overrides dialog boxes and the Page TOC tab dialog.
- Options in Navigation for creating text bars are also affected by CSS.
- For some CSS settings, especially those in the Advanced section of the Paragraph tab dialog, browser behavior is inconsistent. You may need to experiment to see how CSS can enhance the look of your Web pages.

Use this procedure to enable or disable Cascading Style Sheets:

- 1. In the Contents pane, select the template that you want to enable Cascading Style Sheets for and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Select the Allow CSS character and paragraph formatting check box.
- 4. Click **OK** to return to the main window and then modify the element or elements you want to format.

You can use a style sheet in Site Builder, either by referencing a file or by entering the complete style sheet as HTML code in your HTML file. You can do this in the HTML tab dialog of **Globals**. However, the results may not be what you expect.

Site Builder generates CSS1- and CSS2-compatible style sheets inline. (CSS1 and CSS2 are both W3C standards. The more recently recommended CSS2 builds on CSS1.)

With CSS, you can enhance the onscreen presentation of your text. But your browser may not handle CSS well when you print what is on the screen.

Formatting Characters With CSS

Site Builder can be configured to generate formatting with standard HTML tags or with CSS (cascading style sheet) markup. Enabling CSS for a template changes options in the Character and Paragraph tab dialogs in **Formatting**. See Cascading Style Sheets (CSS) (page 6-107).

The Character tab dialog in **Formatting** is used to format text for your Web page at the character level. Options under Font Size are different when you have the CSS functionality turned off. See Formatting Characters Without CSS (page 6-110).

- 1. In **Globals**, click **Options** to open that tab dialog and select the **Allow CSS character and paragraph formatting** check box.
- 2. In Formatting, click Character to open that tab dialog.

- 3. From the Elements list, select the element or elements you want to format.
- 4. Under Font Name, Font Color, and Font Size, select radio buttons for the desired options.

Take From Source means that Site Builder uses what is in the source document. Don't Specify means the Web browser used to view the Web page may substitute its own default settings.

- 5. If you select **Use this font**, click the down arrow on the appropriate drop-down box to select a specific font.
- 6. If you select **Use this size**, you have several options from the drop-down box. In addition to Larger and Smaller and a range of seven sizes from xx-Small to xx-Large (analogous to the sizes numbered 1 through 7 available when CSS is turned off), there is now a Custom option.

By selecting Custom, you can fine-tune the size of text in your Web pages, using one of four units of measure: points, inches, centimeters, or percent. Enter a value for font size and select a unit of measure.

1 inch = 72 points. "Percent" means percentage of the parent element's font size. (For example, the default font size for the $\langle P \rangle$ tag is Medium.)

- 7. If you select **Use this color**, click the color button to open the Color dialog box to select a color.
- 8. Under Text Effects, click **Effects** if you want to change some of the effects used in your source document. (See Text Effects on page 6-128.)
- 9. Under Table Overrides, click **Override when in a table** if you want to format the content of tables in the document differently. (See Formatting Characters in Tables on page 6-113.)
- 10. Click **OK** to save the changes to the template and return to the Edit Template dialog box or the main window.

You may want to use Table Overrides when the same styles have been used for the content of tables as well as for other content in the source document.

The actual font, font size, and font color that display in a Web page are dependent on the Web browser used as well as options on the user's machine.

You use options in the Character and Paragraph tab dialogs of **Formatting** to format the content of tables. You use options in the Tables tab dialog to format the appearance of tables.

Formatting Characters Without CSS

Site Builder can be configured to generate formatting with standard HTML tags or with CSS (cascading style sheet) markup. Enabling CSS for a template changes options in the Character and Paragraph tab dialogs in **Formatting**. See Cascading Style Sheets (CSS) (page 6-107).

The Character tab dialog in **Formatting** is used to format text for your Web page at the character level. Options under Font Size are different when you have the CSS functionality turned on. See Formatting Characters With CSS (page 6-108).

- In the Contents pane, select the template you want to edit and click **Options** in Globals to open that tab dialog, and clear the Allow CSS character and paragraph formatting check box.
- 2. In Formatting, click Character to open that tab dialog.
- 3. From the Elements list, select the element or elements you want to format.
- 4. Under Font Name, Font Color, and Font Size, select radio buttons for the desired options.

Take From Source means that Site Builder uses what is in the source document. Don't Specify means the Web browser used to view the Web page may substitute its own default settings.

- 5. If you select **Use this font** or **Use this size**, click the down arrow on the appropriate drop-down box to select a specific font or size.
- 6. If you select **Use this color**, click the **Color** button to open the Color dialog box to select a color.
- 7. Under Text Effects, click **Effects** if you want to change some of the effects used in your source document. (See Text Effects on page 6-128.)
- 8. Under Table Overrides, click **Override when in a table** if you want to format the content of tables in the document differently. (See Formatting Characters in Tables on page 6-113.)
- 9. Click **OK** to save the changes to the template and return to the Edit Template dialog box or the main window.

You may want to use Table Overrides when the same styles have been used for the content of tables as well as for other content in the source document.

The actual font, font size, and font color that display in a Web page are dependent on the Web browser used as well as options on the user's machine.

Options in the Character and Paragraph tab dialogs of **Formatting** are used to format the content of tables. Options in the Tables tab dialog are used to format the appearance of tables.

Formatting Paragraphs With CSS

Site Builder can be configured to generate formatting with standard HTML tags or CSS (cascading style sheet) markup. Enabling CSS for a template changes the options available in the Character and Paragraph tab dialogs of **Formatting**. See Cascading Style Sheets (CSS) (page 6-107).

The Paragraph tab dialog in **Formatting** is used to set options for paragraphs such as alignment, indentation, and spacing. (You format text in the Character tab dialog.) These options differ significantly with CSS turned off. See Formatting Paragraphs Without CSS (page 6-112).

- 1. In **Globals**, click **Options** to open that tab dialog and select the **Allow CSS character and paragraph formatting** check box.
- 2. In Formatting, click Paragraph to open that tab dialog.
- 3. From the Elements list, select the element or elements you want to format.
- 4. Under Alignment, select one of the three options. If you select **Use this alignment**, use the down arrow to select **Left**, **Center**, **Right**, or **Justify** from the drop-down box.
- 5. Under Indentation, select one of the three options for Left Side. Do likewise for Right Side. If you select Set To in either case, enter the desired value in the edit box or use the Up/Down control to set the value. Click the down arrow on the second box to select a unit of measure: points, inches, or centimeters (1 inch = 72 points).
- 6. Under Spacing, set the additional line space you want before or after each paragraph. Your browser may automatically add space between paragraphs.
- 7. Under Special, click **Render paragraph as a graphic** to save the element information in a graphic format during translation. This could be useful, for example, where you are using an unusual font that users are unlikely to have available on their machines.
- Under Advanced, to set advanced options such as borders and padding, click the Advanced button to open that dialog box. See Setting Advanced Options for Paragraphs (page 6-101).
- 9. Under Table Overrides, click **Override when in a table** if you want to format the content of tables in the document differently. See Formatting Paragraphs in Tables (page 6-115).

10. Click **OK** to save the changes to the template and return to the Edit Template dialog box or to the main window. Or click another tab to format other aspects of the document.

If you work in the Edit Template dialog box, you can use the Preview box to see how your Web page changes with each modification. Also, as you pass your cursor over the content of the Preview window, a tool tip will display the name of each element.

Formatting Paragraphs Without CSS

Site Builder can be configured to generate formatting with standard HTML tags or CSS (cascading style sheet) markup. Enabling CSS for a template changes the options available in the Character and Paragraph tab dialogs of **Formatting**. See Cascading Style Sheets (CSS) (page 6-107).

The Paragraph tab dialog in **Formatting** is used to set options for paragraphs such as alignment, indentation, and spacing. These options differ significantly with CSS turned on. See Formatting Paragraphs With CSS (page 6-111).

- 1. In **Globals**, click **Options** to open that tab dialog and clear the **Allow CSS character and paragraph formatting** check box.
- 2. In Formatting, click Paragraph to open that tab dialog.
- 3. From the Elements list, select the element or elements you want to format.
- 4. Under Alignment, select one of the three options. If you select **Use this alignment**, use the down arrow to select **Left**, **Center**, or **Right** from the drop-down box.
- Under Indentation, select one of the four options. If you select Indent left side only by or Indent both sides by, enter the desired value in the edit box or use the Up/Down control to select the number of tab stops you want to use.
- 6. Under Spacing, set the additional line space you want before or after each paragraph. Your browser may automatically add space between paragraphs.
- 7. Under Special, click **Render paragraph as a graphic** to save the element information in a graphic format during translation. This could be useful, for example, where you are using an unusual font that users are unlikely to have available on their machines.
- 8. Under Table Overrides, click **Override when in a table** if you want to format the content of tables in the document differently. (See Formatting Paragraphs in Tables on page 6-115 for more information.)

9. Click **OK** to save the changes to the template and return to the Edit Template dialog box or to the main window. Or click another tab to format other aspects of the document.

If you work in the Edit Template dialog box, you can use the Preview box to see how your Web page changes with each modification. Also, as you pass your cursor over the content of the Preview window, a screentip will display the name of each element.

Indentation is the only option you have for affecting the layout of paragraphs with CSS turned off. With CSS turned on, however, you can also set margins, borders, padding, and paragraph width.

If you have created a frameset for your publication and have set margins for any of the frames in the frameset, this will affect the indentation setting in the Paragraph tab dialog. In other words, indentation is measured from the margin set for the frame, not from the edge of the frame.

Tables

This section covers the following topics:

- Formatting Characters in Tables (page 6-113)
- Formatting the Appearance of Tables (page 6-114)
- Setting Colors in Tables (page 6-115)
- Formatting Paragraphs in Tables (page 6-115)
- Setting Up Styles to Format the Appearance of Tables (page 6-116)
- Setting Table Borders and Size (page 6-117)
- Setting Table Alignment (page 6-117)
- Formatting Headings in Tables (page 6-118)

Formatting Characters in Tables

When you format characters for an element in a template, the formatting instructions apply throughout your Web pages, including to text in tables.

Ideally, you will want to use unique styles for table content. But if you use the same styles as for the rest of your source document, you can still use Table Overrides to format text in tables differently.

- 1. In **Formatting**, click **Character** to open that tab dialog. Select the element or elements you want to format for tables.
- 2. Under Table Overrides, click **Override when in a table**, and then click **Character**.
- 3. In the Character dialog box for table overrides, select the font name, font color, and font size you want to use. See Formatting Characters Without CSS (page 6-110).
- 4. If you want to change text effects, click **Effects** and set the appropriate options in that dialog box (see Changing Text Effects on page 6-129).
- 5. Click **OK** to save the changes to the template and return to the Character tab dialog.

You use options in the Character and Paragraph tab dialogs of **Formatting** to format the content of tables. You use options in the Tables tab dialog to format their appearance.

Formatting the Appearance of Tables

You can format both the content of tables and their appearance. You format table content in the Character and Paragraph tab dialogs in **Formatting**, using the Table Overrides feature, if necessary. (See Formatting Characters in Tables on page 6-113 and Formatting Paragraphs in Tables on page 6-115.) You format the appearance of tables in the Tables tab dialog.

To format the appearance of a table, you must select the element that is associated with the style that immediately precedes the table in the source document. See Setting Up Styles to Format the Appearance of Tables (page 6-116) for more information on how to make the most of Site Builder's table formatting features.

- 1. In the Contents pane, select the template you want to edit, click **Formatting**, and then click **Tables** to open that tab dialog.
- 2. From the Elements list, select the element that immediately precedes the table in the source document.
- 3. Under Appearance, do one of the following:
 - if you want to format the appearance of the table, click Borders and sizing,
 Alignment, or Colors (all three buttons open the same property sheet, but with a different tab dialog open initially).
 - if you want to ensure that no tables are contained in your output, select Omit all table markup tags from output HTML. When selected, the preview window for that element becomes blank, because no output for that element will appear within a table.

- 4. Under Special, select **Convert two column tables with no visible border to heading and paragraph and use this tag for the heading part**, then select a heading, if you want to convert tables containing two columns and no border into headings and paragraphs.
- 5. Under Empty Cells, accept the default of **Non breaking space** to place a non-breaking space in the output HTML for the table. In HTML, non-breaking spaces are required in blank cells of tables to retain proper formatting. If you would rather add text than leave an empty cell, select the blank text box and enter the text you want to appear, such as "intentionally left blank."
- 6. Under Headers, select **Use row headings** or **Use column headings** if you want the first row of the table or the first column to be treated as headings on your Web pages. (For more information, see Formatting Headings in Tables on page 6-118.)
- 7. Complete formatting for the table, as appropriate.

Setting Colors in Tables

Among the options for formatting the appearance of tables are setting colors for four separate table elements: table border, cell, border, table background, and cell background.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar.
- 2. From the Elements list, select the element that immediately precedes the table in the source document.
- 3. Click Tables to open that tab dialog, and then click Colors.
- 4. Under Table Border, click one of the radio buttons.
- 5. If you select **Use this color**, click the **Color button** to open the Color dialog box and select a color you want to use. Click **OK** to return to the Colors tab dialog in Tables.
- 6. Repeat steps 4 and 5 to set colors for table background and also cell borders and background.
- 7. Click OK.

The Preview box displays your changes.

Formatting Paragraphs in Tables

The Paragraph tab dialog in **Formatting** is used to set options for paragraphs such as alignment, indentation, and spacing. For each element selected, the formatting instructions apply throughout the Web page, including to paragraphs in tables.

Ideally, you will want to use unique styles for table content. But if you use the same styles for the content of tables as for the rest of your source document, you can still use Table Overrides to format paragraphs in tables differently.

- 1. In **Formatting**, click **Paragraph** to open that tab dialog. From the Elements list, select the element or elements you want to format for tables.
- 2. Under Table Overrides, click Override when in a table, and then click Paragraph.
- 3. In the Paragraph dialog box for Table Overrides, select the alignment, indentation, and spacing you want to use. See Formatting Paragraphs Without CSS (page 6-112).
- 4. Click **OK** to save the changes and return to the Paragraph tab dialog.

You use options in the Character and Paragraph tab dialogs of **Formatting** to format the content of tables. You use options in the Tables tab dialog to format the appearance of tables.

Setting Up Styles to Format the Appearance of Tables

To use the Tables tab dialog in **Formatting** to format the appearance of a table, you must select the element that immediately precedes the table. This has the advantage of letting you use unique styles for the content of all your tables while retaining the option of formatting the appearance of the tables differently.

If you plan to format all the tables the same way, you need to identify the styles that precede the tables in your source documents. Then, when you are ready to use the Tables tab dialog in **Formatting**, simply select all the elements based on those styles. Site Builder lets you format multiple elements simultaneously, and this approach will save you time.

On the other hand, if you plan to format some tables differently, minimal editing of your source documents may be required. But you will have much greater control over how your tables display in your Web pages, as a result.

- 1. In your source documents, create a special series of styles named, say, Table1, Table2, etc. They all can have the same attributes and be based on Normal (their attributes don't matter if you use them only for this purpose).
- 2. Assign these styles to the tables in your documents. For example, you might want Table1 to be used for certain tables that you want to appear flush left with a blue border and yellow cell background. Likewise, you might want Table2 to be used for tables that are to be centered, with extra "padding" to set the cells apart.
- 3. That is, before each table in your source document, place the appropriate style. Remember, all you're entering is an empty paragraph. So you can minimize the space the paragraph occupies by setting the font size to 2 or 3 points.

4. Next, re-import the styles from your source documents so that you now have elements for those styles in your publication. When you format the appearance of tables in the Tables tab dialog of **Formatting**, pick the appropriate element: Table1, Table2, etc.

Setting Table Borders and Size

Among the options for formatting the appearance of tables are setting table borders and size. Formatting borders is a three-part process of setting the border width and then adjusting both cell spacing and cell padding. Setting table size refers to setting the width of the table itself.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar.
- 2. From the Elements list, select the element that immediately precedes the table in the source document.
- 3. Click Tables to open that tab dialog, and then click Borders and sizing.
- 4. Under **Table Width**, click the appropriate radio button to set the width of the table in your Web page. If you check Pixels or Percent, you must also enter a value in the appropriate box opposite. You can use the up/down controls to reset the values.
- 5. Under Cell width, click Take from source or Don't specify.
- 6. Under **Border thickness**, select one of the radio buttons. If you select **Use this thickness**, use the Up/Down control to set a value in the box.
- 7. Check Set Cell Spacing and enter value in the box opposite.
- 8. Check Set Cell Padding and enter a value in the box opposite.

The Preview box displays your changes.

Setting Table Alignment

Among the options for formatting the appearance of tables are setting table alignment. This involves setting the horizontal position of the table on the Web page and adjusting the vertical position of cell contents.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar.
- 2. From the Elements list, select the element that immediately precedes the table in the source document.
- 3. Click **Tables** to open that tab dialog, and then click **Alignment**.

- 4. Under Table Horizontal, click one of the radio buttons.
- 5. If you check **Use this alignment**, select **Left**, **Right**, or **Center** from the drop-down list.
- 6. Under **Cell Contents**, select one of the four radio buttons according to how you want to align the contents of the table vertically within the table cells.
- 7. Click OK.

The Preview box displays your changes.

Formatting Headings in Tables

When formatting the appearance of tables (see Formatting the Appearance of Tables on page 6-114), one option is to treat the first row or column of the tables as headings in your Web output. You may want to do this if the tables of your source documents do not have a distinct style (and therefore element) associated with them.

By using this formatting option, the content associated with the heading will be associated with the <TH> tag in the output and not the <TD> tag. Your browser will treat this content differently to make it more distinctive.

The use of the <TH> tag will also make the table's content more accessible to those with disabilities who are using an HTML screen reader to gain access to your Web site and navigate its contents.

- 1. With the appropriate template selected on the main window, click **Formatting** (**I**) to open that property sheet.
- 2. Select the element immediately before the table you want to format and click **Tables** to open that tab dialog.
- 3. Under **Headings**, select **Use row headings** and/or **Use column headings**. You can use both, assuming that all the tables associated with the selected template are structured the same way and it makes sense to treat both the first column and first row of each table as a heading.
- 4. Click **OK** to save your changes and return to the main window.

When you translate your source documents (or view a temporary translation in the Edit Template dialog box), your table row heading and/or table column heading will now be formatted differently, according to how your browser interprets the <TH> tag. For example, in Internet Explorer 5.5 the headings will be bold, centered within each cell.

Lists

This section covers the following topics:

- ✤ Applying the Tag as a Custom Tag (page 6-119)
- Choosing Bullets for Lists (page 6-120)
- Formatting Bulleted Lists (page 6-120)
- Formatting Lists (page 6-121)
- Formatting Numbered Lists (page 6-122)
- Stripping Non-List Items (page 6-123)

Applying the Tag as a Custom Tag

When you work with bulleted lists, you have the option of applying the tag as a custom tag to get the list to display flush left in your Web pages.

When you first translate a list, Site Builder applies the <P> tag to the element associated with list content so that the list displays in your Web pages just as it does in your source documents. To achieve greater control over formatting, you can select **Bulleted list** in the Lists tab dialog in **Formatting**, check **Strip input to first blank space or tab**, and choose a bullet for the list item (see Formatting Bulleted Lists on page 6-120).

With these changes, Site Builder replaces the $\langle P \rangle$ tag with the $\langle LI \rangle$ tag. The bulleted list appears correctly in your Web page, with the old bullet stripped out and the new one in its place. However, the list is indented. That is because when Site Builder applies an $\langle LI \rangle$ tag to each list item, it also applies the $\langle UL \rangle$ tag to the list itself, and the $\langle UL \rangle$ tag forces indentation.

If you want your list to display flush left in your Web pages, you can apply the $\langle LI \rangle$ tag as a custom tag and thus avoid use of the $\langle UL \rangle$ tag.

- 1. In **Formatting**, select the element associated with list items and open the Lists tab dialog.
- 2. Under Type, select Not a list. Check Strip input to first blank space or tab.
- 3. With the element still selected, right-click and choose **Properties** from the popup menu.
- 4. In the Properties dialog box, click **HTML Tag** to open that tab dialog.
- 5. Click **Use custom tag**. Enter **** for the tag to be used before content, and **<**/**LI>** for the tag to be used after content.

6. Click OK, and OK again.

When you translate your source document, Site Builder will create a Web page with the bulleted list flush left. If you view the source, you will see that the tag has been applied to each list item but that no tag has been used.

By treating the list as Not a List (step 2) you won't be able to use a custom bullet.

Choosing Bullets for Lists

When you format bulleted lists, you can select the type of bullet for the list.

- 1. In the Lists tab dialog, click **Bullets**.
- 2. Do one of the following,
 - Under Bullet Type, check Use standard bullet and select a bullet type from the drop-down list, or
 - Check Use custom bullet, and in the File Name text box, enter the name of the file for the bullet you want to use. Alternatively, click Browse to locate the file, or click Gallery to select a bullet from the Gallery.

If you pick a graphic from Content Server, you will activate the **Info** (1) button and thereafter will be able to open the Content Information page for that file at any time.

- 3. In the Alternative Text box, enter information that you would like to display onscreen in the event that the bullet doesn't display. The alternative text will display when (a) a user's browser is text only, (b) a user chooses to disable the browser's graphics functionality, or (c) a visually impaired user is viewing Web pages with an HTML screen reader.). If you do not add alternative text, no default text will be used
- 4. Click OK.

If you check Use Custom Bullet and are using a default graphics set for your template, the path and name of the graphic will appear immediately in the File Name text box. When you return to the Lists tab dialog, the bullet from that Set will display in the Bullet panel as well as in the Preview box.

Formatting Bulleted Lists

Lists are a special kind of content consisting of a series of related items that are either numbered or bulleted. Lists must be treated a special way in Site Builder to ensure they display properly in Web pages. Best results are obtained when you use unique elements for list content. You also need to assign the *<*LI*>* list tag to these elements. The following instructions assume you have done both. If not, see the note in Formatting Lists (page 6-121).

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar.
- 2. Click Lists to open that tab dialog, and select the element you want to format.
- 3. Under Type, select Bulleted list.
- 4. Under Bullet, select **Don't specify** or **Use this bullet**. If the latter, click **Bullets** to open that dialog box. (See Choosing Bullets for Lists on page 6-120 for more information.)
- 5. Check **Strip input to first blank space or tab** if you want to strip out the original bullets from the source data.
- 6. Web browsers don't always properly display the bullets used in the source document. Choose this option to strip out the original bullets and add new ones.
- 7. Click OK.

By selecting Bulleted List (step 3), Site Builder will apply not only the tag to each list item, but also the to the list itself. As a result, the list will appear indented in your Web page. If you prefer, you can avoid use of the tag and display your list flush left by applying the tag as a custom tag. See Applying the Tag as a Custom Tag (page 6-119).

Formatting Lists

Lists are a special kind of content consisting of a related series of items that are either numbered or bulleted. You may have to apply special formatting instructions to a template to ensure that lists display properly in a Web browser.

Among the problems:

- Lists often use tabs to set off the numbers or bullets from the content, but Web browsers do not recognize tabs. So if you "pass through" a list in Site Builder, the space between the numbers or bullets and the content will be eliminated.
- Solid bullets in a source document may be barely visible when translated.
- The number of the first item of a numbered list may no longer be 1.
- Web browsers often "double up" the numbers or bullets of a list, so you often need to have Site Builder strip out the numbers or bullets in the source document.

 The automatic numbering and bulleting features of word processors can create problems, too.

Site Builder does not apply the list tag to lists in source documents. As a result, any list in your source document can be "passed through" during translation. Tabs may be lost and bullets may appear smaller, but otherwise the list content will display satisfactorily in your Web pages.

For best results in formatting lists, you should assign the list tag to list content. To do this, you must associate a unique style with lists in the source document, which is highly recommended. If you haven not done so, you can either create a new style in the source document (and re-import styles), or create a character pattern to search for list content. You can use patterns even if your document is styled (as long as the pattern is mapped to a unique element).

For more information, see:

- Formatting Numbered Lists (page 6-122)
- Formatting Bulleted Lists (page 6-120)
- Changing the HTML Tag Assigned to an Element (page 6-89)
- ✤ Lists (page 6-119)

Formatting Numbered Lists

Lists are a special kind of content consisting of a series of related items that are either numbered or bulleted. You may have to apply special formatting instructions to a template to ensure that lists display properly in a Web browser.

Best results are obtained when you use unique elements for list content. You also need to assign the list tag to these elements. The following instructions assume you have done both. If not, see Formatting Lists (page 6-121).

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar.
- 2. Click **Lists** to open that tab dialog, and select the element associated with the list content.
- 3. Under Type, select Numbered list.
- 4. Under Numbering Type, select **Don't specify** or **Use this type**. If the latter, select the type of numbering you want to use from the Numbering Type drop-down list.

Check **Strip input to first blank space or tab** to strip out numbers from the source data.

Web browsers typically add numbers to numbered lists. Choose this option to avoid having the numbers "double up" on your Web pages.

5. Click OK.

Stripping Non-List Items

Site Builder allows you to strip to the first white space after the first character or word of each paragraph associated with a particular element.

This option typically is used to strip out the bullets a browser automatically adds to a bulleted list so that you can then add your own custom bullets. But you may also want to strip out, for example, other content such as a special paragraph numbering system in the original source document.

- 1. In the Contents pane, select the template you want to edit.
- 2. Click **Formatting** () on the toolbar.
- 3. In the Elements list, select the element associated with the content you want to strip in this fashion.
- 4. Click Lists to open that tab dialog.
- 5. Under Type, select Not a list.
- 6. Click the Strip input to first blank space or tab check box.
- 7. Click OK.

When you translate the project, the content associated with this element will have been stripped of whatever precedes the first blank space or tab of each paragraph.

Graphics

This section covers the following topics:

- Graphics as Input Files (page 6-124)
- Converting Graphics in Source Documents (page 6-124)

Graphics as Input Files

You can use graphics as input files in Site Builder. When Site Builder converts a graphics file, it generates a separate HTML file with navigation buttons and a link to the graphic file (just as it does for a source document).

Site Builder also handles multi-page graphics. The multiple images will be displayed in single HTML file with a title based on the source file name. The title will be represented as a Heading 1 element, which you can use to split the multiple images into multiple HTML files.

Converting Graphics in Source Documents

If your source documents contain graphics, you can control how they are converted during translation and display in Web pages.

Any GIFs, JPEG, PNG, BMP, and WBMP graphics that are externally linked can be passed through unchanged. But any embedded graphics will be converted according to the settings in the Graphics tab dialog. (The default is GIF for an HTML project, and WBMP for a WML project.)

- 1. In the Contents pane, select the template you want to edit, click **Formatting** on the toolbar, and click **Graphics** to open that tab dialog.
- 2. From the Elements box, select the element or elements associated with graphics in the source document.
- 3. Under Format, click **GIF**, **JPEG**, **PNG**, **BMP** or **WBMP**, depending on which format you want to convert your graphics into. (Not all browsers support the PNG format. The WBMP option is designed for WML projects.)
- 4. If you want to make one of the colors in the graphic transparent, click **Make this color transparent** and click the Color button to open the Color dialog box. Select the color and then click **OK** to return to the Graphics tab dialog.
- 5. Under Alignment, select the appropriate radio button to determine the alignment of graphics in Web pages.

Center means the graphic will be centered on a line by itself. Top means the top of the graphic will align with the base line of the text. Bottom means the bottom of the graphic will align with the base line of the text. And Middle means the middle of the graphic will align with the base line of the text.

6. Under Appearance, check **Base image sizes on original graphic size if available** if you want to use the original sizes of the graphics for your Web page. (For example,

you may have resized a graphic when you placed it in a Word file. With this option, you can revert to the original size of the graphic for displaying in your body pages.)

7. If you want to promote the captions of graphics in your source documents to a reference page, click Use caption and then click the Captions button to open that dialog box. See Promoting Captions to a Reference Page (page 6-98) for more information. You can also create alternative text from a caption (see Creating Alternative Text From a Caption on page 5-35).

Use this procedure to embed graphics:

- 1. Under Appearance, check Embed graphic in output page.
- 2. In the Alternate Text text box, type what you want to display in the Web page should the reader's Web browser fail to display a particular graphic. Alternatively, click Use alternative text from source document if available. See Associating Alternative Text with a Graphic From Source (page 5-34) for more information.

Your decision to embed graphics in your files or use placeholders will depend on the number of graphics, their size, and so on. Also, when you embed graphics, Site Builder still creates an output graphics file.

Use this procedure if you link graphics:

- 1. Check Create a link to the graphic.
- 2. If you want text to display as a hotspot in your Web page so that when it is clicked the graphic opens, select **Link using alternative text**, and in the text box enter the text that you want to display.
- 3. Alternatively, select **Link using a thumbnail**, instead, if you want the graphic to display as a thumbnail in the Web page. Either select a specific thumbnail size from the drop-down list, or select **Custom** and enter the width and height of the thumbnail in pixels in the two boxes. If you click **Keep aspect ratio**, you need enter only the height or the width.
- 4. Click OK.

When Site Builder translates source files that contain graphics, the converted graphics are placed in the output directory specified in the Publication or Document Properties dialog box.

Background

This section covers the following topics:

- Setting a Background Image (page 6-126)
- Setting a Background Color (page 6-126)

Setting a Background Image

Among the options available for formatting paragraphs with CSS turned on is setting a background image.

To set a background image

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (**____**) on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements that you want to set a background image for. The image you select will be used as a background for all content associated with these elements.
- 3. Under Advanced, click the **Advanced** button. A Caution dialog box may open to remind you that support for the different features in the Advanced section may vary between browsers. Click **OK**.
- 4. Under Background Image, on the General tab dialog, select **Set background image**, and then click the **Browse** button to locate the graphics file that you want to use. Alternatively, if you know the path and file name of the image, you can enter it directly in the text box.

If you select a graphic from Content Server, you can use the **Info** button (**1**) thereafter at any time to open the Content Information page for that file.

5. Click **OK**, to leave the Advanced dialog box and return to the Paragraph dialog box.

You can set a background color instead of an image. See Setting a Background Color (page 6-126).

Setting a Background Color

Among the options available for formatting paragraphs with CSS turned on is the setting of a background color.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** (**I**) on the toolbar to open that property sheet. Then click **Paragraph** to open that tab dialog.
- 2. From the Elements list, select the element or elements that you want to set a background color for. The color you select will be used as a background for all content associated with these elements.
- 3. Under Advanced, click the **Advanced** button. A Caution dialog box may open to remind you that support for the different features in the Advanced section may vary between browsers. Click **OK**.
- 4. Under Background Color, on the General tab dialog, select **Take from source**, **Don't specify**, or **Use this color**.

Take From Source means that Site Builder uses what is in the source document. Don't Specify means the Web browser used to view the Web page may substitute its own default settings. Use This Color lets you specify the color you want to use.

- If you select Use this color, double-click the Color button to open the Color dialog box. Select the color you want to use and click OK. See Using the Color Dialog Box (page 6-129) for more information.
- 6. Click **OK**, again, to leave the Advanced dialog box and return to the Paragraph dialog box.

You can set a background image instead of a color. See Setting a Background Image (page 6-126). The color that actually displays in the user's browser may differ from the color you select.

Associating HTML or Scripting Code With an Element

You may want to incorporate HTML or scripting code in your Web page. You can associate HTML or scripting code with a specific element of a Web page or associate it globally with the page itself. (To do so globally, see Including HTML or Scripting Code in a Web Page on page 6-180.)

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar.
- 2. Click **HTML** to open that tab dialog.
- 3. From the Elements list, select the element you want to associate the HTML or scripting code with.

- 4. Click Include HTML or scripting code before content.
- 5. You can enter HTML code in the text box provided or select a file containing the code. Do one of the following:
 - Select Use the following and in the text box type the HTML or scripting code you want to associate with the element, or
 - Select Use the contents of this file and in the text box type the fill path and name of the file that contains the code. Alternatively, click Browse or Gallery to locate the file containing the HTML or scripting code.

If you pick a graphic from Content Server, you will activate the **Info** () button and thereafter will be able to open the Content Information page for that file at any time.

6. To include HTML or scripting code after the element selected, click **Include HTML** or scripting code after content, and repeat step 5.

Text Effects

This section covers the following topics:

- Text Effects (page 6-128)
- Changing Text Effects (page 6-129)
- Using the Color Dialog Box (page 6-129)

Text Effects

Text effects are formatting attributes associated with individual characters within a paragraph. Paragraphs often contain words or phrases set in bold or italic, say, that are not part of the paragraph style. When you translate a source document, you can retain these input effects in your Web pages. You can also turn them off or map them to different output effects.

For each effect listed, the following options are available from the drop-down boxes,

- From Source—Select this option if you want to retain a particular effect during translation or want Site Builder to re-map the effect.
- Always On—Select if you always want the effect to apply to all content controlled by the element.
- Always Off—Select if you want to turn off the effect entirely so that it won't display in the Web page. The effect will apply to the whole element.

See Changing Text Effects (page 6-129) and Text Effects (page 6-128).

If you select Always On or Always Off, the effect is removed from the current mappings box because it is no longer available for a change in mapping.

Changing Text Effects

Text effects are formatting attributes associated with individual characters within a paragraph. Paragraphs often contain words or phrases set in bold or italic, say, that are not part of the paragraph style. When you translate a source document, you can map individual input effects to other output effects.

- 1. In Formatting, click Character to open that tab dialog.
- 2. Select the element containing the text effect you want to edit, and click **Effects** to open that dialog box.
- 3. In the Output Effect column, select the effect you want to change, and do one of the following,
 - Right-click to display a popup menu and select the new effect you want to map to, or
 - Click Change to open the Change Text Effects dialog box, and from the dropdown box select the effect you want to use. Then click OK.
- 4. Click **OK** to return to **Formatting**.

The effects Inserted Text and Deleted Text relate to revisions in your source document. They are mapped to Underline and Strikethrough, respectively. For revision text to display in your output pages, you must open the Options tab dialog of **Globals** and select the **Include revision information from source documents** check box. Any colors associated with revision text in your source documents will not be preserved in your output pages.

Using the Color Dialog Box

You use the Color dialog box to set colors for text and other elements of your Web page. When you open the dialog box, a sample of any default color used displays under Custom Colors.

 Select a color under Basic Colors, or click **Define custom color** and use your cursor to select a color from the color matrix. You can use the color bar to fine-tune the color selected. You can also enter RGB values to specify the hue.

The Color | Solid sample box displays each color you choose.

2. Click **Add to custom colors** if you want to make the color available in future. Then click **OK** to accept the color and close the dialog box.

When you return to the previous dialog box, the selected color appears in place of the color sample originally displayed.

The colors that appear in your Web pages are browser dependent. Thus, the settings shown in the **Color** dialog box may not be exactly those that appear in your Web page.

Visual Aids

This section covers the following topics:

- Setting the Order of Navigation and Visual Aids (page 6-130)
- Inserting Icons (page 6-131)
- Inserting Rules (page 6-132)
- Inserting Separators (page 6-133)
- Formatting the Page TOC (page 6-134)

Setting the Order of Navigation and Visual Aids

As you format a template, you may associate a number of navigation or visual aids with a specific element, for example, text bars, button bars, rules, separators, icons, and HTML or scripting code. You can control the order in which these aids appear on your Web page.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar.
- 2. Click Layout to open that tab dialog.
- 3. Select the element you want to set this order for.

Sample text and icons appear in the three preview windows. You can see all the possible navigation and visual aids, as well as HTML or scripting code, that you might associate with an element.

- 4. Use your mouse to drag and drop individual navigation or visual aids, or "Custom HTML," to set the order in which these should appear before or after content, or on the same line as content. You can also change alignment in this way. Or select an item and use the Reorder buttons.
- 5. Click OK.

Unlike other tab dialogs in **Formatting**, you can only format a single element at a time when you are using the Layout tab dialog.

See the Layout tab dialog in **Globals** for setting the layout order of navigation and visual aids for the Web page as a whole.

Inserting Icons

Icons are graphics you can add to Web pages to set off content. Icons, separators, and rules all can be used the same way. So in creating Web pages, you should consider the effect you're trying to achieve before deciding which to use. You insert icons in **Formatting**, once you've selected the template you want to edit.

- 1. In Formatting, click Icons to open that tab dialog.
- 2. From the Elements list, select the element you want to modify.
- 3. To insert an icon before the selected element, check Insert icon before content.
- 4. Do one of the following:
 - ✤ In the File Name text box, enter the file name of the icon graphic, or
 - Click Browse to locate the graphic, or
 - Click Gallery to open the Gallery and select an icon from the graphics available in Site Builder. Select one and click OK.

If you pick a graphic from Content Server, you will activate the **Info** () button and thereafter will be able to open the Content Information page for that file at any time.

- 5. Under Alignment, select Flush left or With content, depending on how the icon should appear in the Web page.
- 6. To insert an icon after the element, check **Insert icon after element** and repeat steps 4 and 5.
- 7. In the Alternative Text box, enter information that you would like to display as a screen tip on the Web page in the event that the separator doesn't display. The alternative text will display when (a) a user's browser is text only, (b) a user chooses to disable the browser's graphics functionality, or (c) a visually impaired user is viewing Web pages with an HTML screen reader. If you do not add alternative text, no default text will be used.
- 8. If the element you are formatting is also used in tables and you do not want icons to display in those tables, check **Omit icons when element is within a table**.

9. Click another tab to format another aspect of the document. Or click **OK** to return to the Edit Template dialog box or to the main window.

Inserting Rules

You can add rules to Web pages to set off content. Rules, separators, and icons all can be used the same way. So in creating Web pages, you should consider the effect you're trying to achieve before deciding which to use. You insert rules in **Formatting**, once you have selected the template you want to edit.

- 1. In Formatting, click Rules to open that tab dialog.
- 2. From the Elements list, select the element you want to modify.
- 3. To insert a rule before the selected element, check Insert rule before content.

If you have picked a graphics set as the default, the path and name of the rule from that Set will appear automatically in the File Name text box, and the rule will appear in the Preview box below. (See Selecting a Graphics Set for a Web Page on page 6-198.) In which case, go to step 8. If you haven't, and the default settings are fine, go to step 7.

- 4. In the **Set Width** edit box, enter the percentage (of the Web browser window) for the width of the rule, or use the up/down control to set the percentage. If you selected Pixels under Width Is, the value you enter will be in pixels.
- 5. In the **Set Height** edit box, enter the height of the rule in pixels, or use the up/down controls to set the pixel height.
- Check **3D Shading** if you want to apply a 3D effect to the rule rather than color it. To color the rule, under Color, click **Set color** and click the **Color button** to open the Color dialog box. Select a color and click **OK** (see Using the Color Dialog Box on page 6-129).
- 7. Under **Alignment**, select **Left**, **Center**, or **Right**, depending on how the rule should appear in the Web page.
- 8. To insert a rule after the element, check **Insert rule after content** and repeat steps 4 to 7.
- 9. If the element you are formatting is also used in tables and you do not want rules to display in those tables, check **Omit rules when element is within a table**. Then click **OK**.

You can also set rules for an entire Web page. See Adding Rules to a Web Page (page 6-174).

Inserting Separators

Separators are graphics you add to Web pages to set off content. Separators, rules, and icons all can be used the same way. So in creating Web pages, you should consider the effect you are trying to achieve before deciding which to use. You insert separators in **Formatting**, once you have selected the template you want to edit.

- 1. In Formatting, click Separators to open that tab dialog.
- 2. From the Elements list, select the element you want to modify.
- 3. To insert a separator before the selected element, check **Insert separator before** element.
- 4. Do one of the following,
 - ✤ In the File Name text box, enter the file name of the separator graphic, or
 - Click Browse to locate the graphic, or
 - Click Gallery to open the Gallery and select a separator from the Separators group of graphics.

If you have picked a graphics set as the default, the path and name of the separator from that Set will appear automatically in the File Name text box, and the separator will appear in the Preview box below. (See Selecting a Graphics Set for a Web Page (page 6-198).)

If you pick a graphic from Content Server, you will activate the **Info** () button and thereafter will be able to open the Content Information page for that file at any time.

- 5. Under Alignment, select Left, Center, or Right, depending on how the separator should appear in the Web page.
- 6. To insert a separator after the element, check **Insert separator after element** and repeat steps 4 and 5.
- 7. In the Alternative Text box, enter information that you would like to display onscreen in the event that the separator doesn't display.
- 8. If the element you're formatting is also used in tables and you don't want separators to display in those tables, check **Omit separators when element is within a table**.
- 9. Click another tab to format other aspects of the document. Or click **OK** to save the changes to the template and return to the Edit Template dialog box or the main window.

You can also set separators for an entire Web page. See Adding Separators to a Web Page (page 6-175).

The alternative text will display when (a) a user's browser is text only, (b) a user chooses to disable the browser's graphics functionality, or (c) a visually impaired user is viewing Web pages with an HTML screen reader.

Formatting the Page TOC

Each Web page can have its own table of contents, which is part of the body page. The elements used in the page TOC will be formatted the same way as for the body page, unless you specify differently.

- 1. In the Contents pane, select the template you want to edit and click **Formatting** on the toolbar to open that property sheet.
- 2. Click Page TOC to open that tab dialog.
- 3. From the Elements list, select the element or elements you want to format.
- 4. There are five formatting option buttons on this tab dialog. Click any button to open a property sheet with tabs available for all five options. The settings available in each of these tab dialogs are the same as can be found in other tab dialogs in Formatting: Character, Paragraph, Icons, Lists, and HTML.
- 5. For example, if you want to format the text itself, click **Character** to open that tab dialog to format character settings (see Formatting Characters Without CSS on page 6-110 for more information).
- 6. Once you are done formatting characters, use the other four tab dialogs, as appropriate, to complete the formatting of your page TOC. See **Related topics** for other topics on formatting the page TOC.

See the Page TOC tab dialog in **Globals** for option of applying global settings for HTML or scripting code, separators, and rules.

NAVIGATION TOPICS

This section covers the following topics:

- Navigation (page 6-135)
- Printing From the Web (page 6-136)
- Hyperlinks (page 6-143)

- Link to Source Button (page 6-145)
- Navigation Bars (page 6-150)
- Graphics (page 6-163)

Navigation

Navigation is one of four property sheets used to edit templates. Once you set up a project, you use the property sheets to complete settings for each template in the project. These settings determine the look and behavior of Web pages created from source documents associated with the templates.

In **Navigation**, you create links to help users move within and between the pages of your publication. Among the options are the ability to:

- Create a page button bar (page G-20) or a page text bar (page G-21)
- Create an element button bar (page G-7) or an element text bar (page G-7)

Whichever type of navigation bar you create, a range of buttons is available for the links. The Gallery offers 28 graphics sets, each consisting of a uniquely designed set of buttons suitable for all navigation purposes. In addition to the usual links for previous page, next page, etc., Site Builder provides several special-purpose links:

- Specific Page—Links to any URL anywhere (see Navigating to Another Web Site on page 6-144).
- Top of Project—Takes the user from anywhere in your Web publication to the highest-level Web page in the project (see Navigating to the Top Page of a Web Publication on page 6-145).
- Link to Source—Lets the user open the source document used to create the Web page on which the button resides (see Opening the Source Document of a Web Page on page 6-148).
- Print—Lets the user print all or select portions of your Web publication, when using the Internet Explorer browser (see Adding a Print Button to Your Web Publication on page 6-138).

Each of these special-purpose links can be added to the navigation button bars you create.

After you select a template for editing, you can open **Navigation** and the other property sheets from the Template toolbar. Or you can open the Edit Template dialog box and move between the four property sheets from there. You can use the property sheets in any order.

If you plan to use a default graphics set, you should pick one before you enter the **Navigation** property sheet. See Selecting a Graphics Set for a Web Page (page 6-198).

Printing From the Web

This section covers the following topics:

- About the Print Button (page 6-136)
- Adding a Print Button to Web Pages (page 6-137)
- Adding a Print Button to Your Web Publication (page 6-138)
- Associating a Print Button With an Element (page 6-138)
- Enabling the Print Functionality (page 6-139)
- Printing a Web Publication (page 6-140)
- PrintPublication.htm (page 6-141)
- Printing the Publication (page 6-141)
- ✤ Map File (page 6-142)

About the Print Button

You can add a Print button to your Web publication to print all or selected portions of the publication if you are using Internet Explorer. The button is not strictly a navigation button, but you use settings in **Navigation** to place it in your Web publication.

Keep these points in mind when working with Print buttons:

- To place a Print button in your Web publication, use options in the Page Button Bar and Element Button Bar of Navigation. See Adding a Print Button to Your Web Publication (page 6-138).
- Since Navigation is template-based, you will need to edit each template in your project if you plan to place the Print button on every Web page.
- You may need to place the Print button only in the most obvious places of your Web publication say, at the top of each TOC. The important thing is that it is accessible to your users at all times. The button functions the same way no matter where it is placed.
- The Print functionality is different for Internet Explorer than Netscape Navigator. In Internet Explorer, the button allows you to print all or select portions of your Web publication. In Netscape Navigator, you can print only the Web page on which the

button resides. (Thus, the button functions similar to the Print button on the browser toolbar.)

To enable the print functionality, you need to (a) add a Print button to the publication, (b) generate an XML Map file, and (c) include a script that will download a print control. Since Site Builder does the last two by default, all you need to do is add a Print button to your publication.

- See Adding a Print Button to Your Web Publication (page 6-138) for more on how to add the button to a page or element button bar.
- Site Builder automatically generates an XML Map file for each project. This file lists the hierarchy and output pages of your publication. The print control (which the Print button activates) uses this file to identify the output files available for printing. See Map File (page 6-142) for more information.
- Site Builder automatically references a file that contains a script that is run the first time the user clicks any Print button in a Web publication. See PrintPublication.htm (page 6-141).

If the print functionality is not enabled for a particular project, a warning message will appear as soon as you try to add a Print button to a project. This could happen, for example, if you import a version 3.x project or publication file. See Enabling the Print Functionality (page 6-139).

Adding a Print Button to Web Pages

The Print button is one of several navigation buttons available for Web pages. Like the other navigation buttons, it can be added to a button bar at the top or bottom of a Web page as part of a Page Button Bar.

The Print button functions differently from the other navigation buttons. Moreover, it functions differently for Internet Explorer than Netscape Navigator. See About the Print Button (page 6-136) and Enabling the Print Functionality (page 6-139).

- 1. In the Contents pane, select the template you want to edit and click Navigation (
- 2. Click **Page Button Bar** to open that tab dialog.
- 3. Double-click in the Before and/or After column opposite Print in the Link Type list (you may have to scroll down to see Print).
- 4. If you already have a graphics set associated with the template, the Print button from that Set will appear in the Preview boxes at the bottom, and the path and file name will appear opposite Print in the Link Icon column. If you don't, click the Gallery button

and choose a Print button from one of the graphics sets. You can click Groups under Mode and then select Print to review all the Print buttons available.

You can also click Browse to locate the file. This may be appropriate if you are substituting one of your own graphics for the buttons in the Gallery.

- 5. Select an alignment option for the button. You can use drag-and-drop to move the button in relation to any other buttons on the page button bar.
- 6. Click OK.

By default, Site Builder uses "Print" as the alternative text for the Print button. You can change this in Link Properties (page 6-143).

If you want the Print button to be accessible to your users at all times, you may want to place it on every TOC in your Web publication.

Adding a Print Button to Your Web Publication

The Print button is one of several navigation buttons available for Web pages. Like the other navigation buttons, you have the option of:

- Adding a Print button to Web pages as part of a page button bar (see Adding a Print Button to Web Pages on page 6-137), or
- Associating a Print button with an element as part of an element button bar (see Associating a Print Button With an Element on page 6-138)

The Print button functions differently from the other navigation buttons. Moreover, it functions differently for Internet Explorer than Netscape Navigator. See About the Print Button (page 6-136) and Enabling the Print Functionality (page 6-139).

Associating a Print Button With an Element

The Print button is one of several navigation buttons available for Web pages. Like the other navigation buttons, it can be associated with a specific element on the Web page as part of an Element Button Bar.

The Print button functions differently from the other navigation buttons, Moreover, it functions differently for Internet Explorer than Netscape Navigator. See About the Print Button (page 6-136) and Enabling the Print Functionality (page 6-139).

- 1. In the Contents pane, select the template you want to edit and click Navigation (
- 2. Click Element Button Bar to open that tab dialog.

- 3. Select the element you want to associate the button with, and then double-click in the Before and/or After column opposite Print in the Link Type list (you may have to scroll down to see Print).
- 4. If you already have a graphics set associated with the template, the Print button from that Set will appear in the Preview box at the bottom, and the path and file name will appear opposite Print in the Link Icon column. If you don't, click the Gallery button and choose a Print button from one of the graphics sets. You can click Groups under Mode and then select Print to review all the Print buttons available.

You can also click Browse to locate the file. This may be appropriate if you are substituting one of your own graphics for the buttons in the Gallery.

- 5. Select an alignment option for the button. You can use drag-and-drop to move the button in relation to any other buttons on the page button bar.
- 6. Click OK.

By default, Site Builder uses "Print" as the alternative text for the Print button. You can change this in Link Properties (page 6-143).

If you want the Print button to be accessible to your users at all times, you may want to place it on every TOC in your Web publication.

Enabling the Print Functionality

The Print button is one of several navigation buttons available for creating Web pages. To use the button, you must enable the print functionality, which entails:

- Adding a Print Button to Your Web Publication (page 6-138)
- ✤ Generating a Map File (page 6-142).
- Running a script to download a print control from the Web site (see About the Print Button on page 6-136 and PrintPublication.htm on page 6-141)

Generally, adding the Print button is the only formal step you need to take. Generating a Map file and including the script are handled by default. You should find the following options set in the Map File/Print Publication tab dialog of the Project Options dialog box:

- Under Map file, the Create XML Map file check box is selected. (For the purposes of enabling the print functionality, it doesn't matter whether the Map file contains source file details or not.)
- The File Name text box should display the path for the script file required to enable the print functionality. If you accepted the default installation, it should read:

 $\label{eq:c:Program Files} C: Program Files \\ Stellent Content Publisher \\ gallery \\ en \\ HTMLCode \\ PrintPublication.htm$

If necessary, click Gallery to open the HTML Code subdirectory, and select the file.

It you are using the Internet Explorer browser, you can select which portions of your Web publication you want to print. In Netscape Navigator, the Print button prints only the Web page on which it resides (and therefore works like the Print button on the browser toolbar).

If for any reason the print functionality is not enabled, a warning will appear as soon as you try to add a Print button to the project. You can then set the above options in the Project Options dialog box.

Printing a Web Publication

One of the navigation options is to add a Print button to your Web publication. The Print button works the same way, no matter where it is placed in your Web publication. See Adding a Print Button to Your Web Publication (page 6-138).

If you are using the Internet Explorer browser, you can select which portions of your Web publication you want to print. With Netscape Navigator, the Print button prints only the Web page on which it resides (and therefore works like the Print button on the browser toolbar).

- 1. Click the Print button in your Web publication. The Select Files to Print dialog box opens.
- 2. Select the appropriate boxes to specify what you want to print.

You can print any combination of pages you want. By default, whatever box you select, all pages below that level will be printed, too. But you can then clear any boxes below that level for those documents you don't want to print. You can thus print any combination of Web pages you want.

- 3. Click OK. The Windows Print dialog box opens.
- 4. Click OK again.

The first time a user clicks the Print button, there will be a short delay until the print functionality is enabled. Thereafter, the user will be able to select and print Web pages immediately. See Enabling the Print Functionality (page 6-139).

PrintPublication.htm

PrintPublication.htm plays an important role in enabling the print functionality when you add a Print button to your Web publication.

- The file is shipped with Site Builder and installed in the \\Gallery\en\HTMLCode directory.
- It contains JavaScript that is placed in the head of every Web page on which you choose to place a Print button. Since the file is referenced by default in the Project Options dialog box, Site Builder does this automatically when it translates a project.
- The first time a user clicks a Print button anywhere in a Web publication, Site Builder runs a script that causes the user's browser to download the file PrintCtl.cab from the Web site. (In the process, the browser displays a message asking the user to confirm the download). The browser then examines this file and extracts, and registers, the file PrintCtl.ocx. It is this file that enables the print functionality.
- In creating a Web publication that contains the Print button, you may want to alert users that the first time they click the Print button there will be a short delay before the PrintCtl.cab file is downloaded and the PrintCtl.ocx file is extracted and registered that is, before the Select Files to Print dialog box actually opens (see Printing a Web Publication on page 6-140).
- This delay will only occur the first time the Print button is used on the first Content Publisher publication run on a user's machine. Once PrintCtl.ocx is downloaded and registered, the Select Files to Print dialog box will open immediately each time the Print button is clicked.
- You can view the contents of this file by opening it in any text editor.

To enable print functionality, you also need a Map File (page 6-142), which Site Builder generates automatically each time you translate.

Printing the Publication

You can add a Print Publication button to your publication, just as you do navigation buttons in **Navigation**. Unlike navigation buttons, however, the print button won't function unless you also identify a script to be used with the button.

- 1. Click Project Options on the View menu to open that dialog box.
- 2. Click Map File / Print Publication to open that tab dialog.

 Under Print Publication, in the File Name text box, enter the path and name of the script you want to use to enable the print publication functionality. Alternatively, click Browse or Gallery to locate the script file.

If you installed Site Builder to the default directory, the default setting is:

 $\label{eq:c:Program Files} C: Program Files \\ Stellent Content Publisher \\ Gallery \\ en \\ HTMLCode \\ PrintPublication.htm$

4. Click OK.

These settings are project-specific and are therefore saved to the project file. The settings will apply whether you run the project locally, move it to a network location, or schedule it for translation by Site Server.

If in step 3 you select a file from Content Server, you will activate the **Info** () button and thereafter will be able to open the Content Information page for that file.

Map File

A Map file is an XML file that Site Builder generates to describe the output of your project on your Web site. The file plays a key role in enabling the print functionality.

- 1. Choose **Project Options** from the **View** menu to open that dialog box.
- 2. Click Map File / Print Publication to open that tab dialog.
- 3. Under Map File, select the Create XML map file check box.
- 4. In the File Name text box, enter the name you want to use for the map file (the default is MapFile). Site Builder will apply the **.xml** extension to the file name when it translates your project and creates the file.
- 5. Select **Map file contains source file details** only if you want the file to reveal the input document names corresponding to your source documents.
- 6. Click OK.

Site Builder places the Map file in the root output directory. If you are moving your output files, you must be sure to move the Map file, too.

When a user clicks a Print button on a Web page, the print control (PrintCtl.ocx) examines the Map file to identify all the output pages that are available for printing. See Printing a Web Publication (page 6-140).

The Map file contains information on output files only for the project it was created for. So the Print functionality created for a publication won't apply to content you may import from another publication (for example, if you placed a non-Content Publisher publication in the frame of a Content Publisher publication). Likewise, if a Content Publisher publication were to become part of a non-Content Publisher publication, the Map file would have to reside at the root level of the Content Publisher output files and could be used to enable print functionality only for those files.

The Map file settings are project-specific and are therefore saved to the project file. They will apply whether you run the project locally, move it to a network location, or schedule it for translation by Site Server.

Hyperlinks

This section covers the following topics:

- Link Properties (page 6-143)
- Navigating to Another Web Site (page 6-144)
- Navigating to the Top Page of a Web Publication (page 6-145)

Link Properties

Link properties are the properties of a navigation link you select when creating a page or element button bar. They comprise:

- Link Type—The type of link you are adding to the page or element button bar. In addition to the usual links for Previous Page, Next Page, etc., Site Builder offers special links for Top of Project, Link to Source, Print, and Specific Page. You must choose a Link Type before entering the Link Properties dialog box.
- Link icon—The button, representing the link, that will display on your Web page. If you have already selected a button for a particular link, it will display in the Link Properties dialog box.
- Include a link of this type—Places the link in your Web publication. The Before content option places the link at the top of the Web page for a page button bar and before the selected element for an element button bar. The After content option places it at the bottom of the Web page or after the element.
- File name—The path and file name for the graphic representing the link. If you have associated a graphics set with your template, the appropriate button will be selected automatically. If a button isn't automatically selected, click the Gallery button to open the Gallery and choose a button. To use one of your own graphics, click the Browse button and locate the graphic in a repository.

If you select a graphic from Content Server, you can open the Content Information page for that graphic at any time by clicking the **Info** button ().

- Alternative text—The text that displays as a screen tip when you pass your cursor over the navigation button on a Web page. Also the text that displays instead of the graphic if the user chooses to view only text in the browser.
- Source page URL—Applicable only when creating a Link to Source navigation button. You can use different URLs (the default is %%TRANSIT-INPUTPATH%%), depending on the location of the source document you are linking to. See Opening the Source Document of a Web Page (page 6-148) for more information.
- Specific page URL—Applicable only when creating a link to a specific page on another Web site. The complete URL for the page you are targeting is entered here. Site Builder provides three links for this purpose. See Navigating to Another Web Site (page 6-144) for more information.

There are 28 graphics sets available from the Gallery in Site Builder. Each one includes a unique set of buttons for creating navigation links.

The button used for a Specific Page link varies from graphics set to graphics set. In some instances the Home button is used. Since this button is also used for a Link to Source link, you may want to consider the best selection of buttons if you happen to be using both types of links in the same navigation bar.

Navigating to Another Web Site

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Specific Page link, which lets you link to any URL anywhere.

See the following for more information:

- Adding a Specific Page Link to a Page Button Bar (page 6-151)
- Adding a Specific Page Link to an Element Button Bar (page 6-152)
- Hyperlinks (page 6-143)

Navigating to the Top Page of a Web Publication

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Top of Project link, which lets the user return to the top page of the highest-level publication in your project from anywhere in the project.

- Adding a Top of Project Link to a Page Button Bar (page 6-153)
- Adding a Top of Project Link to an Element Button Bar (page 6-154)
- Hyperlinks (page 6-143)

Link to Source Button

This section covers the following topics:

- Adding a Link to Source Link to a Page Button Bar (page 6-145)
- Adding a Link to Source Link to an Element Button Bar (page 6-147)
- Opening the Source Document of a Web Page (page 6-148)
- Optional URLs for Linking to a Source Document (page 6-148)

Adding a Link to Source Link to a Page Button Bar

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Link to Source link, which lets users open the source document used to create the Web page on which the link resides.

For a user to be able to open a source document in its native format from a Web page, the application used to create the source document must be available on the user's machine.

To add a Link to Source link to a page button bar

- 1. In the Contents pane, select the template you want to edit and click **Navigation** () on the toolbar.
- 2. Click **Page Button Bar** to open that tab dialog.
- 3. Under **Link Type**, select **Link to Source**, and then click **Properties** to open the Link Properties dialog box.
- 4. Select the **Include a link of this type** check box, and then select the **Before** and/or **After** check box.

- 5. In **File Name** text box, enter the path and name of the graphic to be used for the button. Or click **Browse** or **Gallery** to locate the graphic, if necessary. If you have picked a default graphics set for the template, a button from that Set appears in the appropriate Preview window as soon as you specify a link and leave the Link Properties dialog box. Otherwise, open the Gallery in the groups mode and select a button from the Link to Source group of graphics available. Or click Browse to locate the file you want to use.
- 6. In the **Alternative Text** text box, type the alternative text you want to appear in your Web page (the default text is "Source Document").
- 7. Under **Source page URL** enter the required URL to identify the location of your source document. The default is:

%%TRANSIT-INPUTPATH%%

This "token" will work for all intranet environments where the source file is in a shared location. See Optional URLs for Linking to a Source Document (page 6-148) for more information on alternative URLs.

- 8. Click **OK** to return to the Page Button Bar tab dialog. The path and file name for the navigation button now displays in the Link Icon column.
- Under Align top and/or Align bottom, select Left, Center, or Right to position the graphic on the page. If several graphics are displayed in the preview boxes, you can use drag and drop to change their order. Then click OK to return to the main window.

Note:

To select or clear a button, you can also double-click in the Before or After column (in the Page Button Bar tab dialog) to change the red cross to a green check mark. Alternatively, you can right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column).

If you select a file from Content Server, the **Info** button (**1**) becomes active, and you can check the Content Information page for that file at any time.

The button used for a Specific Page link varies from graphics set to graphics set. In some instances the Home button is used. Since this button is also used for a Link to Source link, you may want to consider the best selection of buttons if you happen to be using both types of links in the same navigation bar.

Adding a Link to Source Link to an Element Button Bar

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Link to Source link, which lets users open the source document used to create the Web page on which the link resides.

For a user to be able to open a source document in its native format from a Web page, the application used to create the source document must be available on the user's machine.

- 1. In the Contents pane, select the template you want to edit and click **Navigation** (
- 2. Click **Element Button Bar** to open that tab dialog.
- 3. From the Elements list, select the element you want to associate the button bar with. Under Link Type, select Link to Source, and then click **Properties** to open the Link Properties dialog box.
- 4. Select the **Include a link of this type** check box, and then select the **Before** and/or **After** check box.
- 5. In File Name text box, enter the path and name of the graphic to be used for the button. Or click Browse or Gallery to locate the graphic, if necessary. If you have picked a default graphics set for the template, a button from that Set appears in the appropriate Preview window as soon as you specify a link and leave the Link Properties dialog box. Otherwise, open the Gallery in the groups mode and select a button from the Specific Page group of graphics available. Or click Browse to locate the file you want to use.
- 6. In the **Alternative Text** text box, type the alternative text you want to appear in your Web page (the default text is "Source Document").
- 7. Under **Source page URL** enter the required URL to identify the location of your source document. The default is:

%%TRANSIT-INPUTPATH%%

This URL will work for all intranet environments where the source file is in a shared location. See Optional URLs for Linking to a Source Document (page 6-148) for more information on alternative URLs.

- 8. Click **OK** to return to the Element Button Bar tab dialog. The path and file name for the navigation button now displays in the Link Icon column.
- 9. Under **Alignment**, select the appropriate radio button, depending on how you want the new link to be positioned on the page. Then click **OK** to return to the main window.

The button used for a Specific Page link varies from graphics set to graphics set. In some instances the Home button is used. Since this button is also used for a Link to Source link, you may want to consider the best selection of buttons if you happen to be using both types of links in the same navigation bar.

To select or clear a button, you can also double-click in the Before or After column (in the Element Button Bar tab dialog) to change the red cross to a green check mark. Alternatively, you can right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column).

If you select a file from Content Server, the **Info** button (**1**) becomes active, and you can check the Content Information page for that file at any time.

When a button is associated with an element and set to align away from content, Site Builder uses an HTML table to achieve this effect. If your audience uses browsers that do not support tables, you should avoid using icons, bullets, or navigation buttons that are formatted to appear away from content.

Opening the Source Document of a Web Page

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Link to Source link, which lets the user open the source document used to create the Web page on which the link resides.

See:

- Adding a Link to Source Link to a Page Button Bar (page 6-145)
- Adding a Link to Source Link to an Element Button Bar (page 6-147)
- Link to Source Button (page 6-145)

Optional URLs for Linking to a Source Document

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Link to Source link, which lets users open the source document used to create the Web page on which the link resides.

This link is set in the Link Properties dialog box in **Navigation**. (In the Page Button Bar or Element Button Bar tab dialog, select Link to Source under Link Type and click Properties to open the dialog box.) You can use different URLs for this link. Each URL uses one of two tokens to help identify the location of the source document.

%%TRANSIT-INPUTPATH%% — Token is replaced by the path and file name of the source document. %%TRANSIT-INPUTFILENAME%% — Token is replaced by the file name of the source document.

Sample URLs

- %%TRANSIT-INPUTFILENAME%% Suitable for an Internet environment where the source document has been associated with a publication in the project and placed in the output Pages directory.
- file://%%TRANSIT-INPUTPATH%% The default setting. Suitable for an intranet environment where the source document is in a shared location that all browsers can see.
- file://\\NORTHEND\source%%TRANSIT-INPUTFILENAME%% Suitable for an intranet environment where it is desirable to convert the path to a UNC.
- http://www.yourname.com\source\%%TRANSIT-INPUTFILENAME%% Suitable for an Internet environment where the source directory has been mapped to the Web server.

Repository-Based Tokens

Where the source document is in the repository of Content Server, three additional tokens are available:

- %%TRANSIT-INPUTDOCID%% Token is replaced by the Content ID of the source document (internally known as dDocName)
- %%TRANSIT-INPUTLIBID%% Token is replaced by the database name (the full CGI URL of the content server).
- %%TRANSIT-INPUTVERSION%% Token is replaced by the unique version number of the source document (internally known as dID).

Example

If you are using Microsoft Internet Information Server (IIS) to host Content Server, the required string will be

http://<webserver>/intradoccgi/idc_cgi_isapi.dll?IdcService=GET_FILE&dID=%%TRANSIT-INPUTVERSION%%

If you are using Netscape Enterprise Server to host Content Server, the required string will be

http://<webserver>/intradoc-cgi/nphidc_cgi.exe?IdcService=GET_FILE&dID=%%TRANSIT-INPUTVERSION%%

In each case, replace **<webserver>** with the name of the Web server hosting your content server.

If you plan to use the same template for two source documents drawn from two different content servers, a better alternative to the above would be:

%%TRANSIT-INPUTLIBID%%?IdcService=GET_FILE&dID=%%TRANSIT-INPUTVERSION%%

For a user to be able to open a source document in its native format from a Web page, the application used to create the source document must be available on the user's machine.

A Link to Source can only be added to a body template. It cannot be placed on a reference page.

Navigation Bars

This section covers the following topics:

- Adding a Specific Page Link to a Page Button Bar (page 6-151)
- Adding a Specific Page Link to an Element Button Bar (page 6-152)
- Adding a Top of Project Link to a Page Button Bar (page 6-153)
- Adding a Top of Project Link to an Element Button Bar (page 6-154)
- Formatting a Text Bar with CSS (page 6-155)
- Navigating With a Page Button Bar (page 6-156)
- Navigating With a Page Text Bar (page 6-157)
- Navigating With an Element Button Bar (page 6-158)
- Navigating With an Element Text Bar (page 6-159)
- Using a Content Server URL to Create a Hyperlink (page 6-160)
- Using a Document Title to Create a Hyperlink (page 6-161)
- Using a Content ID to Create a Hyperlink (page 6-162)
- Retaining Original Bookmark Names (page 6-163)

Adding a Specific Page Link to a Page Button Bar

When you create a page button bar to help users navigate your Web publication, you can include a special link to any URL anywhere. Site Builder lets you create three such links.

- 1. In the Contents pane, select the template you want to edit and click **Navigation** () on the toolbar. Then click **Page Button Bar** to open that tab dialog.
- 2. Under Link Type, select one of the Specific Page entries, and then click Properties to open the Link Properties dialog box.
- 3. Select the **Include a link of this type** check box, and then select the **Before** and/or **After** check box. To select or clear a link, you can also double-click in the Before or After column (in the Page Button Bar tab dialog) to change the red cross to a green check mark. Alternatively, you can right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column).
- 4. In File Name text box, enter the path and name of the graphic to be used for the button. Or click Browse or Gallery to locate the graphic, if necessary. If you have picked a default graphics set for the template, a button from that Set appears in the appropriate Preview window as soon as you specify a link and leave the Link Properties dialog box. Otherwise, open the Gallery (in the Groups mode) and select a button from the Specific Page group. Or click Browse to locate the file you want to use.
- 5. In the **Alternative Text** text box, type the alternative text you want to appear in your Web page.

This text will display as a screentip when you pass your cursor over the navigation button on a Web page. It will also display instead of the graphic if the user chooses to view only text in the browser

- 6. In the **Specific Page URL** text box, enter the full URL for the specific page on the Web site you want to link to.
- 7. Click **OK** to return to the Page Button Bar tab dialog. The path and file name for the navigation button now display in the Link Icon column.
- 8. Under **Align top** and/or **Align bottom**, select Left, Center, or Right to position the graphic on the page. If several graphics are displayed in the preview boxes, you can use drag and drop to change their order.
- 9. Click **OK** to return to the main window.

The button used for a Specific Page link varies from graphics set to graphics set. In some instances the Home button is used. Since this button is also used for a Link to Source link,

you may want to consider the best selection of buttons if you happen to be using both types of links in the same navigation bar.

Adding a Specific Page Link to an Element Button Bar

When you create an element button bar to help users navigate your Web publication, you can include a special link to any URL anywhere. Site Builder lets you create three such links.

- 1. In the Contents pane, select the template you want to edit and click **Navigation** () on the toolbar. Then click **Element Button Bar** to open that tab dialog.
- From the Elements list, select the element you want to associate the button bar with. Under Link Type, select one of the Specific Page entries, and click Properties to open the Link Properties dialog box.
- 3. Select the **Include a link of this type** check box, and then select the **Before** and/or **After** check box. To select or clear a button, you can also double-click in the Before or After column (in the Element Button Bar tab dialog) to change the red cross to a green check mark. Alternatively, you can right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column).
- 4. In File Name text box, enter the path and name of the graphic to be used for the button. Or click Browse or Gallery to locate the graphic, if necessary. If you have picked a default graphics set for the template, a button from that Set appears in the appropriate Preview window as soon as you specify a link and leave the Link Properties dialog box. Otherwise, open the Gallery (in the groups mode) and select a button from the Specific Page group. Or click Browse to locate the file you want to use.
- 5. In the **Alternative Text** text box, type the alternative text you want to appear in your Web page.

This text will display as a screentip when you pass your cursor over the navigation button on a Web page. It will also display instead of the graphic if the user chooses to view only text in the browser

- 6. In the **Specific Page URL** text box, enter the full URL for the specific page on the Web site you want to link to.
- 7. Click **OK** to return to the Element Button Bar tab dialog. The path and file name for the navigation button now display in the Link Icon column.
- 8. Under **Alignment**, select the appropriate radio button, depending on how you want the new link to be positioned on the page. When a button is associated with an element

and set to align away from content, Site Builder uses an HTML table to achieve this effect. If your audience uses browsers that do not support tables, you should avoid using icons, bullets, or navigation buttons that are formatted to appear away from content.

9. Click **OK** to return to the main window.

The button used for a Specific Page link varies from graphics set to graphics set. In some instances the Home button is used. Since this button is also used for a Link to Source link, you may want to consider the best selection of buttons if you happen to be using both types of links in the same navigation bar.

Adding a Top of Project Link to a Page Button Bar

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Top of Project link, which lets the user return to the top page of your Web publication from anywhere in the publication.

- 1. In the Contents pane, select the template you want to edit and click **Navigation** () on the toolbar.
- 2. Click Page Button Bar to open that tab dialog.
- 3. Under **Link Type**, select **Top of Project**, and then click **Properties** to open the Link Properties dialog box.
- 4. Select the **Include a link of this type** check box, and then select the **Before** and/or **After** check box.
- 5. In File Name text box, enter the path and name of the graphic to be used for the button. Or click Browse or Gallery to locate the graphic, if necessary. If you have picked a default graphics set for the template, a button from that Set appears in the appropriate Preview window as soon as you specify a link and leave the Link Properties dialog box. Otherwise, open the Gallery (in the groups mode) and select a button from the Top of Project group. Or click Browse to locate the file you want to use.
- 6. In the **Alternative Text** text box, type the alternative text you want to appear in your Web page (the default text is "Home Page").
- 7. Click **OK** to return to the Page Button Bar tab dialog. The path and file name for the navigation button now display in the Link Icon column.
- 8. Under **Align top** and/or **Align bottom**, select Left, Center, or Right to position the graphic on the page. If several graphics are displayed in the preview boxes, you can use drag and drop to change their order.

9. Click **OK** to return to the main window.

To select or clear a button, rather than open Link Properties, you can double-click in the Before or After column to change the red cross to a green check mark. Alternatively, you can right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column).

The button used for a Specific Page link varies from graphics set to graphics set. In some instances the Home button is used. Since this button is also used for a Link to Source link, you may want to consider the best selection of buttons if you happen to be using both types of links in the same navigation bar.

Adding a Top of Project Link to an Element Button Bar

Among the navigation options in Site Builder are several special-purpose links that can be added to a page or element button bar. Included is the Top of Project link, which lets a user return to the top page of your Web publication from anywhere in the publication.

- 1. In the Contents pane, select the template you want to edit and click **Navigation** (1) on the toolbar.
- 2. Click **Element Button Bar** to open that tab dialog.
- 3. From the Elements list, select the element you want to associate the button bar with. Under **Link Type**, select **Top of Project**, and then click **Properties** to open the Link Properties dialog box.
- 4. Select the Include a link of this type check box, and then select the Before and/or After check box. To select or clear a button, you can also double-click in the Before or After column to change the red cross to a green check mark. Alternatively, you can right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column).
- 5. In File Name text box, enter the path and name of the graphic to be used for the button. Or click Browse or Gallery to locate the graphic, if necessary. If you have picked a default graphics set for the template, a button from that Set appears in the appropriate Preview window as soon as you specify a link and leave the Link Properties dialog box. Otherwise, open the Gallery in the groups mode and select a button from the Top of Project group of graphics available. Or click Browse to locate the file you want to use.
- 6. In the **Alternative Text** text box, type the alternative text you want to appear in your Web page (the default text is "Home Page").

- 7. Click **OK** to return to the Element Button Bar tab dialog. The path and file name for the navigation button now display in the Link Icon column.
- 8. Under **Alignment**, select the appropriate radio button, depending on how you want the new link to be positioned on the page. When a button is associated with an element and set to align away from content, Site Builder uses an HTML table to achieve this effect. If your audience uses browsers that do not support tables, you should avoid using icons, bullets, or navigation buttons that are formatted to appear away from content.
- 9. Click **OK** to return to the main window.

The button used for a Specific Page link varies from graphics set to graphics set. In some instances the Home button is used. Since this button is also used for a Link to Source link, you may want to consider the best selection of buttons if you happen to be using both types of links in the same navigation bar.

If the root publication is framed, clicking the Top of Project button will open the frameset. If it is unframed and has a TOC, the link will be to the TOC. If it is unframed without a TOC, the first page in the publication will open.

Formatting a Text Bar with CSS

The formatting options for creating text bars differ, depending on whether Cascading Style Sheets (CSS) is turned on or off.

With CSS turned off, the Font panel in the Page Text Bar and Element Text Bar tab dialogs of Navigation displays as follows:

Figure 6-6 CSS turned off

Font-	
Use this <u>f</u> ont	
Arial	-
☑ Use this size	
Custom	
12.00 🚔 points 💌	
🗖 Bold 🔲 Italic 🔲 All Caps	

With CSS turned on, it displays as follows:

Figure 6-7 CSS turned on

Font Use th	is <u>f</u> ont		
Arial			-
🔽 Use th	is size		
Absolute		▼ 3	-
🗖 Bol <u>d</u>	🗖 <u>I</u> talic	🔲 All Caps	

Thus, with CSS, you have additional options from the drop-down list for **Use this size**. In particular, by selecting Custom, you can choose both the unit of measure (points, inches, centimeters, or percentage) and a precise font size.

Navigating With a Page Button Bar

Among your navigation options is the ability to create a button bar to be placed on each page of your Web publication. The button bar can contain links to other parts of your publication. It can also contain special links such as those that allow the user to print the publication and to open the source documents used to create it.

You can also create an element button bar that is associated with a specific element in your publication (see Navigating With an Element Button Bar on page 6-158).

- 1. In the Contents pane, select the template you want to edit and click **Navigation** (
) on the toolbar.
- 2. Click **Page Button Bar** to open that tab dialog.
- 3. Under Link Type, select the link you want to create.
- 4. For each type of link you want, double-click the red cross in the Before and/or After column, depending on where you want to place the specific link (top or bottom of the page). The red cross turns into a green check mark.

If you have picked a default graphics set for the template, a button from that Set appears immediately in the appropriate Preview window below and the path and file name for the graphic appears in the Link Icon column. Otherwise, click Gallery and select a button from the appropriate group.

5. To change the order of the buttons on the bar, select the button you want to move and use the Reorder arrows above the Top of Page Preview window, or simply drag and drop the graphics image.

- 6. Under **Align top**, select Left, Center, or Right, depending on where you want the button bar positioned. Under **Align bottom**, do the same.
- 7. Click OK.

In step 4, you could also right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column). Alternatively, once you select a Link Type (step 3), you can click Properties to open the Link Properties dialog box and make your selection there (see Link Properties (page 6-143)).

The **Continue links between documents** check box is selected by default. As a result, users can scroll through the Web pages created from all of the source documents in a given publication. To create a formal break after the last Web page of each document, clear this check box.

Navigating With a Page Text Bar

Among your navigation options is the ability to create a page text bar to link the pages of your Web publication. The text is drawn from headings (or other content) of all the Web pages for a given publication.

You can also create an element text bar that draws its content from headings on the Web page on which the text bar resides (see Navigating With an Element Text Bar (page 6-159)).

- 1. In the Contents pane, select the template you want to edit and click **Navigation** (
- 2. Click Page Text Bar to open that tab dialog.
- 3. Click **Build a text bar from all**, and from the first drop-down list, select the element to be used for building the text bar. From the second drop-down list, select the number of words to be used for each entry.

Example If you select Heading 1 and accept the default of 2 words, Site Builder creates a text bar comprising an entry for each heading at that level, using the first two words of each heading.

- 4. Click **Strip input to first blank space or tab**, if necessary (recommended if the element is numbered, so that only the text of the element will appear in the text bar).
- 5. Under **Placement**, select Top of Page or Bottom of Page.
- 6. Under Alignment, select Left, Center, or Right.

- 7. Under **Font**, click **Use this font** and select the font you want to use from the dropdown list. Then click **Use this size** and select Absolute, Larger or Smaller. If you choose Absolute, select a relative size from the second drop-down list.
- 8. Select Bold, Italic, and/or All Caps to complete the formatting of your text bar.
- 9. Click OK.

If you turn on Cascading Style Sheets for the template, the drop-down list for font size (step 7) provides more options. In particular, you can select Custom and then choose both a unit of measure (the default is points) and a precise font size. See Formatting a Text Bar with CSS (page 6-155).

The font you select for the text bar must be available on the user's machine. Otherwise, the browser will substitute a font.

Navigating With an Element Button Bar

Among your navigation options is the ability to associate a button bar with a specific element on your Web pages. The button bar can contain links to other parts of your publication. It can also contain special links such as those that allow the user to print the publication and to open the source documents used to create it.

You can also create a page button bar to appear at the top and/or bottom of your Web pages (see Navigating With a Page Button Bar on page 6-156).

- 1. In the Contents pane, select the template you want to format and click **Navigation** () on the toolbar.
- 2. Click **Element Button Bar** to open that tab dialog.
- 3. From the Elements list, select the element you want to associate the button bar with. Under **Link Type**, select the link you want to create.
- 4. For each type of link you want, double-click the red cross in the Before and/or After column, depending on where you want to place the specific link (before and/or after the element). The red cross turns into a green check mark.

If you have picked a default graphics set for the template, a button from that Set appears immediately in the appropriate Preview window below and the path and file name for the graphic appears in the Link Icon column. Otherwise, click Gallery and select a button from the appropriate group.

5. To change the order of the buttons on the bar, select the button you want to move and use the Reorder arrows above the Preview window, or simply drag and drop the graphics image.

6. Under **Alignment**, select the appropriate radio button, depending on how you want the new link to be positioned in this page.

When a button is associated with an element and set to align away from content, Site Builder uses an HTML table to achieve this effect. If your audience uses browsers that do not support tables, you should avoid using icons, bullets, or navigation buttons that are formatted to appear away from content.

7. Click OK.

In step 4, you could also right-click and choose the green check mark from the popup menu, or press Ctrl+B (Before column) or Ctrl+A (After column). Alternatively, once you select a Link Type (step 3), you can click Properties to open the Link Properties dialog box and make your selection there (see Link Properties on page 6-143).

The **Continue links between documents** check box is selected by default. As a result, users can scroll through the Web pages created from all of the source documents in a given publication. To create a formal break after the last Web page of each document, clear this check box.

Navigating With an Element Text Bar

Among your navigation options is the ability to create an element text bar to link the elements of a Web page. The text is drawn from headings (or other content) on the Web page on which the text bar resides.

You can also create a page text bar that draws its content from all the Web pages for a given publication (see Navigating With a Page Text Bar on page 6-157).

- In the Contents pane, select the template you want to format and click Navigation (
) to open that property sheet.
- 2. Click **Element Text Bar** to open that tab dialog.
- 3. Click **Build a text bar from all**, and from the first drop-down list, select the element to be used for building the text bar. From the second drop-down list, select the number of words to be used for each entry.

Example If you select Heading 1 and accept the default of 2 words, Site Builder creates a text bar comprising an entry for each heading at that level, using the first two words of each heading.

4. Click **Strip input to first blank space or tab**, if necessary (recommended if the element selected is numbered, so that only the text of the element will appear in the text bar).

- 5. Under **Placement**, click **Top of page** or **Bottom of page** to place the text bar at the top or bottom of Web pages. To place the text bar before or after a specific element, click **Before every** or **After every** and choose that element from the appropriate drop-down list.
- 6. Under Alignment, select Left, Center, or Right.
- 7. Under **Font**, click **Use this font** and select the font you want to use from the dropdown list. Then click **Use this size** and select Absolute, Larger or Smaller. If you choose Absolute, select a relative size from the second drop-down list.
- 8. Select **Bold**, **Italic**, and/or **All Caps** to complete the formatting of your text bar.
- 9. Click OK.

If you turn on Cascading Style Sheets for the template, the drop-down list for font size (step 7) provides more options. In particular, you can select Custom and then choose both a unit of measure (the default is points) and a precise font size. See Formatting a Text Bar with CSS (page 6-155).

The font you select for the text bar must be available on the user's machine. Otherwise, the browser will substitute a font.

Using a Content Server URL to Create a Hyperlink

When creating a hyperlink to a document stored in Content Server, one option is to use the content server URL.

This type of link will be preserved (fixed up, if necessary) when the document containing the link or both documents (the document that contains the link and the document that is a target of the link) are included in a Content Publisher project.

Say only the document containing the link is included in your project. In that event, by clicking the link in the output Web page created from that document, you will log into Content Server and be able to view the target document from within the content server.

Say both documents are included in your project. Again, the link will be preserved (fixed up, if necessary) during translation, but this time you will be able to view both documents as part of your Web publication. By clicking the link in the output Web page created from the first document, you will open the output Web page created from the target document.

Follow these steps to create a hyperlink in Word:

Say you want to place a hyperlink in Document A (your source Word document) that targets Document B, which has been checked into Content Server.

1. In Word, open Document A.

- 2. In Content Server, open the **Content Information** page for Document B.
- 3. Right-click the **Web Location URL** for Document B, and choose **Copy Shortcut** from the popup menu.
- 4. Switch to Word, where Document A is open. Select the text that will contain the hyperlink, and click **Hyperlink** on the **Insert** menu.
- 5. In the **Insert Hyperlink** dialog box, place the cursor in the **Link to File or URL** text box and press **Ctrl-V** to copy the shortcut containing the URL for Document B into the text box.
- 6. Click **OK**, and then **Save**.

Content Publisher fixes up these links, as necessary, in order to preserve them in the output pages. See Retaining Links to Documents Stored in Content Server (page 6-197) for alternative methods to creating hyperlinks.

The links between documents must function correctly in Content Server in order for them to work correctly in Content Publisher.

The Globals option for "relinking hyperlinks in output pages" must be selected to retain links to documents stored in the content server. The option is selected by default. (See Retaining Links to Documents Stored in Content Server on page 6-197.)

Using a Document Title to Create a Hyperlink

When creating a hyperlink to a document stored in Content Server, one option is to use the document title.

This type of link will be preserved (fixed up, if necessary) when both the document that contains the link and the document that is a target of the link are included in a Content Publisher project.

Say you want to place a hyperlink in Document A (your source Word document) that targets Document B, which has been checked into Content Server.

- 1. In Word, open Document A.
- 2. Select the text that will contain the hyperlink, and click **Hyperlink** on the **Insert** menu.
- 3. In the **Insert Hyperlink** dialog box, place the cursor in the **Link to File or URL** text box and type the document title for Document B into the text box. You must include the extension.
- 4. Click **OK**, and then **Save**.

During fixup, Content Publisher could mistake a Content ID for a document title and attempt a link to that, instead. This could happen if, say, the document title is in the form of a number. For example, in searching for the document 000116.pdf, Content Publisher could find a document with the Content ID 000116 -- and link to that by mistake.

To avoid this, turn off the Globals option for preserving hyperlinks in output pages. (This option is turned on by default. See Relinking Hyperlinks in Output Pages (page 6-196).)

See Retaining Links to Documents Stored in Content Server (page 6-197) for alternative methods to creating hyperlinks.

This type of link will not work in Content Server. But Content Publisher will perform the necessary fixup during staging and publishing to ensure that they work in the output pages.

The source and target documents must be in the same project and in the same content server. Also, the output files must be emitted to the same folder of the translation area.

The standard naming option must be selected. ("Use standard naming" is turned on by default. See the Repositories tab of the Project Options dialog box, from the View menu.)

Using a Content ID to Create a Hyperlink

When creating a hyperlink to a document stored in Content Server, one option is to use the Content ID.

Say you want to place a hyperlink in Document A (your source Word document) that targets Document B, which has been checked into Content Server.

- 1. In Word, open Document A.
- 2. In Content Server, open the Content Information page for Document B.
- 3. Select the Content ID and press Ctrl-C.
- 4. Switch to Word, where Document A is open. Select the text that will contain the hyperlink, and click **Hyperlink** on the **Insert** menu.
- 5. In the **Insert Hyperlink** dialog box, place the cursor in the **Link to File or URL** text box and press **Ctrl+V** to copy the Content ID for Document B into the text box.
- 6. Click OK, and then Save.

This type of link will work if both the source and target documents are included in your project and are stored in the same content server. Content Publisher fixes up these links, as necessary, in order to preserve them in the output pages.

See Retaining Links to Documents Stored in Content Server (page 6-197) for alternative methods to creating hyperlinks.

The Globals option for "relinking hyperlinks in output pages" must be selected to retain links to documents stored in the content server. The option is selected by default. (See Relinking Hyperlinks in Output Pages on page 6-196.)

Retaining Original Bookmark Names

The global settings available to enhance the look of Web pages include the option to retain bookmark names that are in the source document and place those names in the appropriate location in the output web pages.

To preserve bookmark names

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Select the **Retain original bookmark name** check box.
- 4. Click **OK**.

Graphics

This section covers the following topics:

- Changing the Properties of Graphics Sets (page 6-164)
- Changing the Properties of Groups of Graphics (page 6-164)
- Creating a New Graphics Set (page 6-164)
- Creating a New Group of Graphics (page 6-165)
- Deleting a Graphics Set (page 6-165)
- Editing a Graphics Set (page 6-166)
- Templates and Associated Graphics Sets (page 6-166)
- Editing a Group of Graphics (page 6-167)
- Formatting a Rule for a Graphics Set (page 6-168)
- ✤ Gallery Sets (page 6-168)
- Renaming a Graphics Set (page 6-169)

- The Gallery (page 6-169)
- Graphics Formats Supported (page 6-170)

Changing the Properties of Graphics Sets

You can create a new graphics set for the Gallery and edit existing Sets. You do this in Set Properties dialog box, which is available from the Gallery dialog box when it is in the Sets mode. (Click **Properties** to open the dialog box.)

See:

- Creating a New Graphics Set (page 6-164)
- Editing a Graphics Set (page 6-166)
- Graphics (page 6-163)

Changing the Properties of Groups of Graphics

You can create a new group of graphics for the Gallery, and edit new or existing groups. You do this in Set Properties in the Groups mode.

See:

- Creating a New Group of Graphics (page 6-165)
- Editing a Group of Graphics (page 6-167)
- Graphics (page 6-163)

Creating a New Graphics Set

You can create a new graphics set in the Gallery if you don't want to use any of the Sets provided. You can open the Gallery in different ways. If you select a template and open **Globals**, click the Set tab, and then click Gallery, the Gallery is already in the Sets mode.

- 1. Click **New** to open the Set Properties dialog box.
- 2. In the Name text box, enter the name you want to use for the new Set.
- 3. Double-click any of the buttons you want to use, for example, Previous Page (top left). This will return you to the Gallery, which is now in the Groups mode.
- 4. From the Groups box, click the plus box opposite Preview Page to list all the graphics available in that category.

- 5. Click several, in turn, to see which one you want to use. Select one and click **OK**. You'll return to Set Properties, with the graphic you just selected in the Previous Page box.
- 6. In the Set Properties dialog box, double-click the second button you want to use, and repeat steps 4 and 5.
- 7. Repeat this procedure until you have created a graphics set that includes all the navigation and visual aids you'll need for your Web pages.
- 8. When you're done, click **OK**. When you return to the Gallery this time, you will be in the Sets mode and the name of the new Set will display under Sets, to the left.

If you select a rule as part of your graphics set, see Formatting a Rule for a Graphics Set (page 6-168) for how to edit its size and color.

Creating a New Group of Graphics

Site Builder ships with over 900 GIFs in groups or categories, such as separators and bullets. You can create a new group, if you want. You can use some of the graphics already in the Gallery or your own graphics.

- 1. In the Gallery dialog box, select Groups under Mode.
- 2. Click New.
- 3. In the Name text box enter the name of the group you want to create.
- 4. In the **File Name specification** text box, enter a specification for the type of graphics you'll place in the group (say, *.gif). You can enter multiple specifications by separating them with a comma.
- 5. In the **Directory**, enter a path for the directory that contains the graphics you want to place in the new group (use the Browse button to locate the directory, if necessary).
- 6. Under Group Type, select the type of group you want to create.
- 7. Click OK.

Deleting a Graphics Set

You can delete a graphics set in the Gallery at any time.

- 1. Under Mode, select Sets.
- 2. From the list of Sets, select the Set you want to delete.
- 3. Click Delete.

Editing a Graphics Set

You can edit a graphics set in the Gallery at any time, whether it's a Set provided by Site Builder or one you created yourself. You can open the Gallery in different ways. If you select a template and open **Globals**, click the Set tab, and then click Gallery, the Gallery is already in the Sets mode.

- 1. Under Sets, select the graphics set you want to edit.
- 2. Click **Properties** to open the Set Properties dialog box.
- 3. Double-click the graphic you want to change, for example, Index. You'll return to the Gallery, which is now in the Groups mode.
- 4. Under Groups, locate the Index group and click the plus box to display all the graphics available in that group.
- 5. Select another graphic and click **OK**. You'll return to the Set Properties dialog box, with the new graphic you selected now in the Index box.
- 6. Repeat these steps to edit any additional buttons you want to change.
- 7. Click OK.

Templates and Associated Graphics Sets

The table below lists all 19 body templates in the default project file. The graphics set listed for each body template is also associated with the TOC, Query, and Index templates, where available. (There are 28 graphics sets in Site Builder, so not all are used.)

Template	Graphics Set
Academy	Aqua Weave
Acclaim CSS	Investment
Account	Clearing House
Adagio CSS	Gray Tab
Administration	Planner
Analysis	Grouted Tiles
Archive CSS	Scalloped

Template	Graphics Set
Blank	None
Business	Blue Bevel
Ceremonial	Blue Mexico
Courtesy CSS	Cranberry Script
Executive	Gray Tab
Introduction CSS	Blue Peach
Lotus 1-2-3	Royal Cloth
Lotus Freelance	Olive
MS Excel	Skill Set
MS PowerPoint	Maroon Sand
Purple Frost	Lilac Spiral
Retrofied! CSS	Salmon Retro

Editing a Group of Graphics

You can edit a group of graphics in the Gallery at any time, whether an existing group or one you created yourself.

- 1. Under Mode, select Groups.
- 2. Under Groups, select the group you want to edit.
- 3. Click **Properties** to open the Set Properties dialog box.
- 4. Edit the **Name, File Name Specification**, **Directory**, and **Group Type** information, as appropriate.
- 5. Click OK.

Formatting a Rule for a Graphics Set

Each graphics set in the Gallery has a rule as part of the Set. And when you create a new graphics set (see Creating a New Graphics Set on page 6-164), you have the option of including a rule in the Set.

In the Set Properties dialog box, you select the bar containing the rule, which activates the Properties button in the Horizontal Rule panel. You can then click Properties to open the Rule Properties dialog box.

- 1. Opposite the **Set width** box, accept the default 80% or use the Up/Down control to adjust the value. If you prefer to set the value in pixels, click **Pixels** in the **Width is** panel, and then adjust the value in the **Set width** box.
- 2. Opposite **Set height (pixels**), set a value for the height of the rule in pixels. Use the Up/Down control to adjust the value, if necessary.
- 3. Click **3D** Shading if you want a 3D effect for the rule. Alternatively, click **Set Color** in the Color panel and click the **Color button** to open the Color dialog box. Select a color and click **OK** to return to the Rule Properties dialog box.

You can check your formatting in the Sample box as you make changes.

- 4. Under **Alignment**, check Left, Center, or Right for the horizontal placement of the rule.
- 5. Click **OK** to return to the Set Properties dialog box.

If you make the graphics set your default for a template, this rule will be available throughout Site Builder for the template. That is, wherever you select a rule, the settings will be automatically used. However, you can always format the rule differently for a specific use, if you want.

Gallery Sets

Site Builder ships with over 900 GIFs for use as navigation and visual aids. Many of them are available as part of the 28 graphics sets you can choose from to ensure a consistent look to your Web pages.

Each Set consists of all the navigation buttons you'll need to create the necessary jumps between the pages of your Web publication, plus a separator, a horizontal rule, a bullet, and a background. And each Set has its own distinctive design.

You can make any of the Sets your default Set for a particular template. Once you do that, graphics from that Set are immediately available from the Set at appropriate points in the program.

For example, if in **Formatting** you want to place a separator before the element selected, simply click the Insert Separator Before Content check box in the Separators tab dialog. The separator from the default graphics set will display immediately in the Preview window and the path and file name for the graphic will display in the File Name text box.

When you associate a graphics set with a template, the background graphic is automatically applied to all Web pages controlled by that template. You can change this, if you want, in the Colors tab dialog of **Globals**.

See:

- Selecting a Graphics Set for a Web Page (page 6-198)
- Graphics (page 6-163)

Renaming a Graphics Set

- 1. Open the **Globals** property sheet.
- 2. Click Set to open that tab dialog, and then click Gallery to open the Gallery.
- 3. Select the Set you want to rename, and click **Properties** to open the Set Properties dialog box.
- 4. In the Name text box, enter the name you want to use for the Set, and click OK.
- 5. Click **OK** to return to the Set tab dialog, and **OK** again to return to the main window.

The Gallery

Graphics can enhance your Web pages in many ways. Site Builder ships with over 900 GIFs that can be selected from 28 pre-arranged Sets that contain navigation and visual aids in the same graphics style. You can also select graphics grouped in categories such as backgrounds and separators (the same categories are reflected in the folders found in the Gallery directory). You can even create your own Sets.

The Gallery has two modes: Sets and Groups. In the Sets mode (the default), you can click the options in the Sets window (Apple Butter, etc.) to view the various navigation buttons and other visual aids available in a particular style. (To view the graphic individually, click the plus box next to the Set name to open a folder and then click the graphics you want to view.)

In the Groups mode, click any plus box in the Groups window to open the folder to reveal all the graphics of a particular type available. You can select the first graphic in the group and press the down arrow repeatedly to scroll through all the options available.

Graphics Formats Supported

Site Builder supports the graphics formats listed below.

All embedded graphics in source documents are converted according to the default setting in the Graphics tab dialog of Formatting. The options are GIF, JPEG, PNG, WBMP, and BMP. Any linked graphic in the source documents will be "passed through" by Site Builder during translation. All other linked graphics will be governed by the settings in Formatting.

Format	Version
Adobe Photoshop* (PSD)	4.0
Adobe Illustrator* (AI)	through 7.0, 9.0
Adobe FrameMaker Graphics (FMV)	vector/raster through 5.0
Adobe Acrobat* (PDF)	2.1, 3.0 – 7.0
Ami Draw (SDW)	Ami Draw
AutoCAD* Interchange and Native Drawing Formats	DXF and DWG
AutoCAD Drawing	2.5, 2.6, 9.0 through 14.0, 2000i and 2002
AutoShade Rendering (RND)	2.0
Binary Group 3 Fax	all versions
Bitmap (BMP, RLE, ICO, CUR, OS2 DIB, and WARP)	all versions
CALS Raster (GP4)	Type I and Type II
Corel Clipart format (CMX)	5 through 6
Corel Draw (CDR)	3.x - 8.x
Corel Draw* (CDR with TIFF header)	2.x - 9.x
Computer Graphics Metafile (CGM)	ANSI, CALS, NIST 3.0

Format	Version
Encapsulated PostScript (EPS)	TIFF header only
GEM Paint (IMG)	no specific version
Graphics Environment Manager (GEM)	bitmap and vector
Graphics Interchange Format (GIF)	all versions
Hewlett Packard Graphics Language (HPGL)	2.0
IBM Graphics Data Format (GDF)	1.0
IBM Picture Interchange Format (PIF)	1.0
Initial Graphics Exchange Specification* (IGES)	5.1
JFIF (JPEG not in TIFF format)	all versions
JPEG (including EXIF)	all versions
Kodak Flash Pix (FPX)	all versions
Kodak Photo CD (PCD)	1.0
Lotus PIC	all versions
Lotus Snapshot	all versions
Macintosh PICT1 & PICT2	bitmap only
MacPaint (PNTG)	no specific version
Micrografx Draw (DRW)	through 4.0
Micrografx Designer (DRW)	through 3.1
Micrografx Designer* (DSF)	Windows 95, 6.0
Novell PerfectWorks (Draw)	2.0
OS/2 PM Metafile (MET)	3.0
Paint Shop Pro 6 (PSP)	Windows only, 5.0 - 6.0

Format	Version
PC Paintbrush (PCX and DCX)	all versions
Portable Bitmap (PBM)	all versions
Portable Graymap (PGM)	no specific version
Portable Network Graphics (PNG)	1.0
Portable Pixmap (PPM)	no specific version
Postscript* (PS)	Level II
Progressive JPEG	no specific version
Sun Raster (SRS)	no specific version
StarOffice / Open Office Draw	5.2, 6.x, 7.x / 1.1 (text only)
TIFF	through 6
TIFF CCITT Group 3 & 4	through 6
Truevision TGA (TARGA)	2
Visio (preview)	4
Visio	5, 2000 and 2002
WBMP	no specific version
Windows Enhanced Metafile (EMF)	no specific version
Windows Metafile (WMF)	no specific version
WordPerfect Graphics (WPG and WPG2)	through 2.0, 7 and 10
X-Windows Bitmap (XBM)	x10 compatible
X-Windows Dump (XWD)	x10 compatible
X-Windows Pixmap (XPM)	x10 compatible

The asterisk (*) denotes a high-end graphics formats. All high-end graphics formats are provided "as is," without representations or warranties.

In addition to graphics formats, Site Builder supports many text formats. (See Text Formats Supported on page 5-45.)

You can also pass through source documents to preserve the original file type or file extension, such as HTML, XML, PDF, and so on. (See About Pass-Through Conversion on page 5-37.)

You can also treat graphics as input files in Site Builder (see Graphics as Input Files on page 6-124).

GLOBAL SETTINGS

This section covers the following topics:

- ✤ Globals (page 6-173)
- Horizontal Rules (page 6-174)
- ✤ Table of Contents (page 6-176)
- HTML and Scripting (page 6-177)
- Tokens (page 6-186)
- Query Pages (page 6-189)
- Hyperlink Behavior (page 6-195)
- Text and Background Color (page 6-198)
- Other Web Page Settings (page 6-200)

Globals

Globals is one of four property sheets used to edit templates. Once you set up a project, you use the property sheets to complete the settings for each template. The settings determine the look and behavior of a Web page created from any source document associated with the template.

In **Globals**, your settings apply to a Web page as a whole. The settings are still saved as part of the template but are not associated with specific elements.

Globals' options include:

- Set colors for the whole Web page, including colors for links, depending on their status
- ✤ Add titles to the Web publication and individual Web pages
- Insert separators and rules to be placed at the beginning and end of a Web page
- Insert an address, copyright line, and email address in your Web page
- ✤ Add separators, rules, and HTML code to the page TOC

To open Globals, select a template for editing and

- Click Globals () on the Template toolbar, or
- Open the Edit Template dialog box and click the Globals button.

In the Edit Template dialog box, you can move between the four property sheets and use them in any order. You can also preview your changes as you make them.

Horizontal Rules

This section covers the following topics:

- ✤ Adding Rules to a Web Page (page 6-174)
- Adding Separators to a Web Page (page 6-175)

Adding Rules to a Web Page

The global settings available to enhance the look of Web pages include the option to add rules to a Web page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click **Rules** to open that tab dialog.
- 3. Click **Insert rule before content**. If you want to accept the defaults, go to step 7.
- 4. In the Width Is panel, select % or **Pixels**. In the Set Width edit box, enter a value for the percentage or number of pixels you want to use, or use the Up/Down control to select the value.
- 5. In the Set Height edit box, enter a value for the number of pixels you want to use, or use the Up/Down control to select a value.

- 6. Under Color, click **Set Color** and then click the **Color button** to open the Color dialog box. Select the color you want to use for the rule and click **OK**.
- 7. Under Alignment, click **Left**, **Center**, or **Right**, depending on how you want the rule to align on the page.
- 8. Check the Samples box to view the changes you make.
- 9. To add a rule after the content, click **Insert rule after content** and repeat steps 4 to 7. Then click **OK**.

Adding Separators to a Web Page

The global settings available to enhance the look of Web pages include the option to add separators to a Web page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click Separators to open that tab dialog.
- 3. Click Insert separator before content.
- 4. Enter the path and file name of the graphic you want to use in the text box, or click **Browse** or **Gallery** to locate the graphic. If you already have a default graphics set, the separator from that Set will appear when you click the check box.
- 5. Under Alignment, click **Left**, **Center**, or **Right**, depending on how you want the separator to align on the page.
- 6. To add a separator after the content, click **Insert separator after content** and repeat steps 4 and 5.
- 7. In the Alternative Text box, enter information that you would like to display onscreen in the event that the separator doesn't display.
- 8. Click OK.

If you select a file from Content Server (by clicking Browse in step 4), you can click the **Info** button ()) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

The alternative text (Step 7) will display when (a) a user's browser is text only, (b) a user chooses to disable the browser's graphics functionality, or (c) a visually impaired user is viewing Web pages with an HTML screen reader.

If you do not add alternative text, no default text will be used.

Table of Contents

This section covers the following topics:

- Adding Global Settings to a Page TOC (page 6-176)
- ♦ Adding Rules to a Page TOC (page 6-176)
- Adding Separators to a Page TOC (page 6-177)

Adding Global Settings to a Page TOC

In **Globals** you can add three settings that affect the page TOC as a whole: rules, separators, and HTML or scripting code. These are all done from the Page TOC tab. See **Related Topics** for specific topics that address these options.

You can also edit the page TOC in **Formatting**. There, you format the individual elements of a page TOC. See Formatting the Page TOC (page 6-134).

Adding Rules to a Page TOC

The global settings available to enhance the look of your Web page include the option to add rules to the page TOC of the page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click **Rules** to open that tab dialog, and then click **Page TOC**.
- 3. In the Page TOC tab dialog, click Insert rule before content.

If you want to accept the defaults, go to step 7.

- 4. In the Width Is panel, select % or Pixels. In the Set Width edit box, enter a value for the percentage or number of pixels you want to use, or use the Up/Down control to select the value.
- 5. In the Set Height edit box, enter a value for the number of pixels you want to use, or use the Up/Down control to select a value.
- 6. Under Color, click **Set Color** and then click the **Color button** to open the Color dialog box. Select the color you want to use for the rule and click **OK**.
- 7. Under Alignment, click **Left**, **Center**, or **Right**, depending on how you want the rule to align on the page.

The Samples box will show the changes made.

- 8. To add a rule after the content, click **Insert rule after content** and repeat steps 4 through 7.
- 9. Click OK.

Adding Separators to a Page TOC

The global settings available to enhance the look of Web pages include the option to add separators to the page TOC of the page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click Page TOC to open that tab dialog, and then click the Separators button.
- 3. In the Separators tab dialog, click Insert separator before content.
- 4. Enter the path and file name of the graphic you want to use in the text box, or click Browse or Gallery to locate the graphic. If you already have a default Set, the separator from that Set will appear when you click the check box.
- 5. Under Alignment, click **Left**, **Center**, or **Right**, depending on how you want the separator to align on the page.
- 6. To add a separator after the content, click **Insert separator after content** and repeat steps 4 and 5.
- 7. In the Alternative Text box, enter information that you would like to display onscreen in the event that the separator doesn't display.
- 8. Click **OK**.

If you select a file from Content Server (by clicking Browse in step 4), you can click the **Info** button () at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

The alternative text will display when (a) a user's browser is text only, (b) a user chooses to disable the browser's graphics functionality, or (c) a visually impaired user is viewing Web pages with an HTML screen reader.

HTML and Scripting

This section covers the following topics:

- Including HTML or Scripting Code at the Top of an HTML File (page 6-178)
- Handling an Event Within a Body Page (page 6-179)

- ✤ Including HTML or Scripting Code in a Page TOC (page 6-179)
- Including HTML or Scripting Code in a Web Page (page 6-180)
- Including HTML or Scripting Code in the Head of a Web Page (page 6-181)
- Including HTML or Scripting Code Inside the HTML Tag (page 6-182)
- Including Scripting Variables in Output (page 6-183)
- Scripting Variables in Site Builder (page 6-183)
- Compliance With HTML 4.0 (page 6-184)
- Generating XML-Compliant Output (page 6-185)

Including HTML or Scripting Code at the Top of an HTML File

The global settings available to enhance the look of Web pages include an option to place HTML or scripting code at the top of an HTML file, before the <HTML> tag. (See Including HTML or Scripting Code in the Head of a Web Page on page 6-181 and Tokens for Adding HTML Code on page 6-186.)

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click **Head** to open that tab dialog.
- 3. Click **Include HTML or scripting code at the top of file**, and do one of the following:
 - Click **Use the following**, and enter the code in the box, or
 - Click Use the contents of this file and enter the path and file name in the text box or click the Browse or Gallery button to locate the file.
- 4. Click OK.

It is up to the author to supply and verify any linked file in HTML or scripting code that is inserted. If the HTML or scripting code calls another file, that file should be placed in the proper output directory (see Associating a File With a Publication on page 5-99).

To state that your Web pages comply with HTML version 4.0, use the <!DOCTYPE> declaration at the top of your HTML file. That is, check the appropriate boxes and place the following in the first text box:

<!DOCTYPE HTML PUBLIC "-//W3C/DTD HTML 4.0 Final//EN">

If you select a file from Content Server (step 3), you can click the **Info** button (**1**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

Handling an Event Within a Body Page

You can assign an event handler to a Web page that is triggered each time an event occurs in your browser. Such an event handler might be onLoad or onUnload. You could also include HTML code or JavaScript within the page.

- 1. Click **Globals** (**(**) on the toolbar to open that property sheet.
- 2. Click **Tags** to open that tab dialog.
- 3. Click **Include HTML or scripting code in the Body tag**, and then click either **Use the following** or **Use the contents of this file**.
- 4. If you click Use the following, enter the code you want to use in the box provided.
- 5. If you click **Use the contents of this file**, enter the path and file name in the text box, or click **Browse** to locate the file, or click **Gallery** to pick a file from the HTML Code folder in the Gallery.
- 6. Click OK.

If you select **Use the contents of this file** and the referenced file references another file, such as a graphic, this file should be listed in the Associated Files dialog box so that Site Builder will copy this file to the output directory when you translate the publication. See Associating a File With a Publication (page 5-99).

To temporarily remove an event handler from a body page but keep it available for future use, clear the **Include HTML or scripting code in the Body tag** check box. When you're ready to assign the event handler once more within the body page, select the check box.

See Handling an Event Within a Frameset (page 5-64), Handling an Event for an Element (page 6-23), Tokens for Adding HTML Code (page 6-186), and Including HTML or Scripting Code Inside the HTML Tag (page 6-182).

If you select a file from Content Server (step 5), you can click the **Info** button (**[]]**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

Including HTML or Scripting Code in a Page TOC

The global settings available to enhance the look or functionality of Web pages include the option to place HTML or scripting code in the page TOC of the page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Page TOC** to open that tab dialog, and then click the **HTML** button.
- 3. In the HTML tab dialog, click Include HTML or scripting code before the content.
- 4. Do one of the following:
 - Click **Use the following** and enter the code you want to use in the box.
 - Click Use the contents of this file and enter the path and file name in the text box or click the Browse or Gallery button to locate the file.
- 5. If necessary, click **Include HTML or scripting code after the content** and repeat step 4.
- 6. Click OK.

It is up to the author to supply and verify any linked file in HTML or scripting code that is inserted. If the HTML or scripting code calls another file, that file should be placed in the output directory (see Associating a File With a Publication on page 5-99).

See Tokens for Adding HTML Code (page 6-186).

If you select a file from Content Server (step 4), you can click the **Info** button (**1**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

Including HTML or Scripting Code in a Web Page

The global settings available to enhance the look or functionality of Web pages include the option to place HTML or scripting code in a Web page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click **HTML** to open that tab dialog.
- 3. Click Include HTML or scripting code before the content.
- 4. Do one of the following:
 - Click **Use the following** and enter the code you want to use in the box.
 - Click Use the contents of this file and enter the path and file name in the text box or click the Browse or Gallery button to locate the file.
- 5. If necessary, click **Include HTML or scripting code after the content** and repeat step 4.

6. Click OK.

It is up to the author to supply and verify any linked file in HTML or scripting code that is inserted. If the HTML or scripting code calls another file, that file should be placed in the output directory (see Associating a File With a Publication on page 5-99).

See Tokens for Adding HTML Code (page 6-186).

If you select a file from Content Server (step 4), you can click the **Info** button (**[11]**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

Including HTML or Scripting Code in the Head of a Web Page

The global settings available to enhance the look of your Web page include an option to place HTML code in the head of a Web page. (See Including HTML or Scripting Code at the Top of an HTML File on page 6-178.)

- 1. In the Contents pane, select the template you want to edit and click **Globals** () on the toolbar.
- 2. Click **Head** to open that tab dialog.
- 3. Click Include HTML or scripting code in the Head, and do one of the following:
 - Click Use the following, and enter the code in the box, or
 - Click Use the contents of this file and enter the path and file name in the text box or click the Browse or Gallery button to locate the file.
- 4. Click OK.

It is up to the author to supply and verify any linked file in HTML or scripting code that is inserted. If the HTML code calls another file, that file should be placed in the proper output directory.

See Tokens for Adding HTML Code (page 6-186).

If you select a file from Content Server (step 3), you can click the **Info** button (**[11]**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

You can convert HTML source files (for example, ASP files) by adding the appropriate header information to the output files. In addition to following the above steps to add the code containing the header information, you should select the **Include for HTML documents** check box. The specified code will be added to the top of all HTML source files associated with the selected template.

Including HTML or Scripting Code Inside the HTML Tag

You can include HTML or scripting code inside the HTML tag, which will be applied globally to your Web output pages. Typically, the most likely use of this would be to drop in the LANG or Version attributes.

The LANG attribute allows you to identify the language being used for the Web pages associated with the template, while the Version attribute allows you to include a version number in the output. The LANG attribute can be used by a user agent in different ways, including assisting search engines and speech synthesizers.

- 1. On the main window, select the template you want to edit and click **Globals** () on the standard toolbar.
- 2. Click **Tags** to open that tab dialog.
- 3. Select **Include HTML or scripting code inside the HTML tag**, and then click either **Use the following** or **Use the Contents of this file.**
- 4. If you click **Use the following**, enter the code you want to use. For example, to denote Web pages in Italian, you would enter LANG="it" (note the quotations marks around the language abbreviation).
- 5. If you click **Use the contents of this file**, enter the path and file name in the text box, or click **Browse** to locate the file.
- 6. Click OK.

If you select **Use the contents of this file** and the referenced file references another file, this file should be listed in the Associated Files dialog box so that Site Builder will copy this file to the output directory when you translate the publication. See Associating a File With a Publication (page 5-99).

To temporarily remove HTML or scripting code from a body page but keep it available for future use, clear the **Include HTML or scripting code in the HTML tag** check box. When you're ready to assign the code once more within the HTML tag, select the check box.

See Handling an Event Within a Body Page (page 6-179) (which you would also set up on the Tags tab dialog).

If you select a file from Content Server (step 5), you can click the **Info** button (**()**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

Including Scripting Variables in Output

The global settings available to enhance the look or functionality of Web pages include the option to include scripting variables in output pages. With JavaScript, these variables can be used to access different information stored in the output HTML files.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click Include scripting variables in output.
- 4. Click **Variables contain source file details** if you want the TRANSIT_SOURCE variable to include the path of source documents.
- 5. Click OK.

See Scripting Variables in Site Builder (page 6-183) for a complete list of variables in Site Builder.

Scripting Variables in Site Builder

The global settings available to enhance the look or functionality of your Web pages include the option to include scripting variables in output pages. With Javascript, these variables can be used to access different information stored in the output HTML files.

Site Builder does not automatically include scripting variables in your output HTML files. See Including Scripting Variables in Output (page 6-183).

Following is a list of all the Site Builder variables. Except for TRANSIT_SOURCE, all links will be relative paths so that they work equally well in the staging and published areas.

TRANSIT_XMLFILE	a relative link from this document to the XML Map file
TRANSIT_DOCID	the ID (as stored in the XML Map file) of this document
TRANSIT_PREVPAGE	a relative link from this document to the previous page
TRANSIT_NEXTPAGE	a relative link from this document to the next page
TRANSIT_FIRSTPAGE	a relative link from this document to the first page of the current publication

TRANSIT_TOC	a relative link from this document to the table of contents
TRANSIT_LOF	a relative link from this document to the list of figures
TRANSIT_LOT	a relative link from this document to the list of tables
TRANSIT_INDEX	a relative link from this document to the index
TRANSIT_QUERY	a relative link from this document to the query page
TRANSIT_HOME	a relative link from this document to the project's home page
TRANSIT_SOURCE	an absolute path to the source file for this document (empty for reference documents)
TRANSIT_FRAMESET	the relative path to the publication frameset file
TRANSIT_BODYFRAME	the frame name for body documents
TRANSIT_TOCFRAME	the frame name for the TOC
TRANSIT_LOFFRAME	the frame name for the LOF
TRANSIT_LOTFRAME	the frame name for the LOT
TRANSIT_INDEXFRAME	the frame name for the INDEX
TRANSIT_CONTAINFRAM E	the name of the frame, if any, that contains the Content Publisher publication (e.g. `_top')

Compliance With HTML 4.0

If you are using a CSS-enabled template, Site Builder is fully compliant with the HTML 4.0 standard. If you are using a non–CSS-enabled template, Site Builder does not comply with HTML 4.0 in one respect.

Site Builder seeks to duplicate the look of source documents in the Web pages you create. As a result, in order to duplicate indentation in the source documents, Site Builder uses the <BLOCKQUOTE> and tags. You can remove these if you want to create a Web publication that is fully compliant with HTML 4.0.

To create a Web publication compliant with HTML 4.0

- In the Contents pane, select one of the templates you want to edit, and click Formatting () on the toolbar.
- 2. Select all the elements in the Elements list.
- 3. Click the Paragraph tab to open that tab dialog.
- 4. Under Alignment, click Don't Specify.
- 5. Click **OK** to return to the Contents pane.
- 6. Repeat steps 1 to 5 for any additional templates in your publication.
- 7. Click Save to save your template changes to the project file.

Generating XML-Compliant Output

The global settings available in Site Builder include the option to generate XML output.

Any source documents that Site Builder can turn into HTML output, it can just as easily turn into XML output. As a result, information is no longer trapped in Web pages, but can be made accessible to other applications.

Site Builder generates XML output by removing telltale HTML elements such as the HTML, Head, and Body tags. It also balances tags, where necessary. Thus, instead of generating for HTML output, Site Builder will generate (the forward slash at the end of the element content is used to denote the closing tag).

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click Generate XML-compliant output.
- 4. Click the **XML Options** button to open that dialog box. In the XML Options dialog box you might specify an XML declaration such as <?xml version="1.0"?>.
- 5. Enter XML code, as appropriate, at the top of all output HTML files and also at the end by selecting the appropriate check boxes, clicking **Use this** (specify the code) or **Use the contents of this file** (specify the file that contains the code).
- 6. Click **OK** to return to the Options tab dialog, and **OK**, again, to return to the main window.

Site Builder does not automatically apply the .xml extension to XML output. You may want to use the .xml extension, since some viewers will not recognize XML files without it. See Specifying the Extension for Output Files (page 5-106).

If you select a file from Content Server (step 5), you can click the **Info** button (**[1]**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

Tokens

This section covers the following topics:

- Tokens for Adding HTML Code (page 6-186)
- Template Token Example (page 6-189)

Tokens for Adding HTML Code

Several tokens are available when adding HTML code to a Web publication. The tokens can be used when inserting HTML code before or after an element, at the top of a file or in the head of a file, or before or after any content.

%%TRANSIT-CONTENT%%

Site Builder replaces this token in the output HTML with the specified content. For example, Weblink, one of three character elements in the templates that ship with Site Builder, includes the following HTML code before the element:

This is an example of pattern matching. During translation, Site Builder replaces %%TRANSIT-CONTENT%% with the appropriate content each time it finds a string beginning with www, and adds http:// to the string. As a result, all such links to Web sites are automatically activated in the output pages.

%%TRANSIT-GALLERY_GRAPHIC_DIR%%

This token can be used when referring to an object in the Gallery Graphics directory.

%%TRANSIT-PATH(TOC)%% %%TRANSIT-PATH(LOF)%% %%TRANSIT-PATH(LOT)%% %%TRANSIT-PATH(INDEX)%% %%TRANSIT-PATH(FILENAME)%%

These tokens are used to dynamically include a reference page in a separate Web page, usually the cell of an HTML table. (See Populating the Cells of an HTML Table on page 5-80.) When the project is translated, staged, and published, the token is replaced with the path to the reference page file. The %%TRANSIT-PATH(FILENAME) token

displays the file name and extension of the current output file. The Transit-Path token must be used with a scripting language (Idoc, ASP, SSI, or JSP). For scripting syntax, see HTML Table Cells and Dynamic Includes (page 5-77).

<!-- TRANSIT - LAYOUT(TOC) --> <!-- TRANSIT - LAYOUT(LOF) --> <!-- TRANSIT - LAYOUT(LOT) --> <!-- TRANSIT - LAYOUT(INDEX) --> <!-- TRANSIT - CUSTOMLAYOUT(BODY) -->

These tokens are used to statically include a reference page or body page in a separate Web page, usually the cell of an HTML table. (See Populating the Cells of an HTML Table on page 5-80.) When the project is translated, staged, and published, the token is replaced with the contents of the source reference page or body page. Content Publisher body pages can be included as a static page only. As such, the 'TRANSIT - CUSTOMLAYOUT(BODY)' tag is used, regardless of the static or dynamic nature of your Web page.

<!-- TRANSIT - CUSTOMLAYOUT(TOP) --> <!-- TRANSIT - CUSTOMLAYOUT(HEAD) --> %% TRANSIT-BODYATTRIBUTES%%

These tokens are used to insert template settings into the custom table layout that you likely created in a third-party HTML editor. The 'TOP' token should be placed at the top of the Web page before the <HTML> tag. The 'HEAD' token should be placed between the <HEAD> tags. The 'Body Attributes' token should be placed in the <BODY> tag. Lastly, the necessary tokens from above (reference and body pages) need to be placed in the Web page, where you want the reference or body page content to appear.

See an example of all three tokens in the Web page (possibly created in a third party HTML editor) that will serve as a custom table layout for your publication (see Template Token Example on page 6-189).

%%TRANSIT-RELATIVEPATH(path statement)%%

The above token is used to insert a relative path rather than a full path to a Web page on your site. (Replace 'path statement' with the path to the file.) When the project is translated, staged, and published, the token is replaced with the relative path to the source document. For example, you may want to use this token when you link from one source document to another in the same publication or different publications.

Example: If you have a page located in c:\output\sub1\sub2\, and you want to link from that page to another page located in c:\output\filename.htm, you could use this token instead of manually determining the relative path (such as "..\..\") in the directory

structure. By inserting this token with the path to the file -- for example: %%TRANSIT-RELATIVEPATH(C:\output\filename.htm)%% -- you would successfully link to the other Web page when you translate, stage, and publish your project.

```
%%TRANSIT-DM_UIPROPERTY(Field Caption)%%
%%TRANSIT-DM_PROPERTY(Field Name)%%
```

With either of these two tokens you can retrieve the same property value. Depending on which one you use, the token is replaced in the output HTML by the corresponding Field Caption value or Field Name value. Field Caption refers to the label used in the interface to identify a document property; Field Name refers to the string in Content Server that uniquely identifies the same property.

Field Caption	Field Name
Account	dDocAccount
Author	dDocAuthor
Title	dDocTitle
Туре	dDocType
Security Group	dSecurityGroup
Release Date	dInDate
Expiration Date	dOutDate
Comments	xComments

You can retrieve the same property value by using either method. For example, you might add one of the following as HTML code in the Head tab dialog of Globals, to be inserted before content in your output pages:

```
<META NAME="Author" CONTENT="%% TRANSIT-
DM UIPROPERTY(Author)%%">
```

```
<META NAME="Author" CONTENT="%% TRANSIT-
DM_PROPERTY(dDocAuthor)%%">, or
```

Either would produce the same result:

<META NAME="Author" CONTENT="Jane Doe">

All tokens and their parameters are case sensitive.

The reference page token (%%TRANSIT-PATH()%%) is used when you dynamically include content in the cell of an HTML table, using Idoc, ASP, or JSP scripting languages. See Creating an HTML table layout for details.

The field caption "Account" was previously called "Document Account." You can still use "Document Account" (any projects that already use this field caption will still run fine). Likewise, you can still use "Document Author," "Document Title," and "Document Type."

Although you can publish output containing content server metadata by using the "Field Caption" and "Field Name" tokens, there is an alternative that gives you more control over the look and feel of the publication, including the promotion of content server metadata to the TOC. See Making a Metadata Element-Based (page 6-78) and Publishing Metadata to a Content Server (page 6-79) for more information.

Template Token Example

Tokens are in bold for illustration:

Query Pages

This section covers the following topics:

- Choosing Fields and Buttons for a Query Page (page 6-190)
- Query Reference Page (page 6-191)
- Selecting a Query Form (page 6-192)
- Setting Options for a Query Results Page (page 6-193)

Choosing Fields and Buttons for a Query Page

A Query reference page (see Query Reference Page (page 6-191)) can add a powerful dimension to your Web publication by creating a search feature that can be used to locate information not only in your Web publication but also anywhere in the content server in which your Web publication resides.

Once you add a Query page to your publication, you then set parameters for searches on the page. This three-part task consists of:

- Selecting a Query form
- Choosing fields and buttons for the Query page
- Setting options for the Query results page

You set the parameters in the Query tab dialog in **Globals**. Most of the options are not enabled until you have set staging and/or publishing options, and thus identified a content server for the Web publication.

- 1. In the Contents pane, select the Query page and click **Globals** (.) on the standard toolbar.
- 2. Click **Query** to open that tab dialog (which is available only when you select a Query page in the Contents pane).
- 3. On the **Fields and Buttons** tab dialog, first select the search fields you want to be available for searches.

The default is for all the fields listed in the Query Field column to display on your Query page. You can double-click any entry in the Show/Hide column to toggle between showing and hiding a field on the Query page. Alternatively, you can select the entry and click the Show or Hide button at the side. Whatever Query fields you select, they will only show in the Query page if the script allows it.

4. Select a style for the buttons that will display on the Query page. The default style is displayed in the preview box. To select an alternative button style, click **Browse** to locate a graphic in a repository that you want to use, or click **Gallery** to select a graphic from the Gallery in Site Builder.

You must use either the default buttons or alternative buttons. Once you select an alternative, you can toggle between that button and the default button by double-clicking the green check mark or red cross in the Use Graphic column. (If you never select an alternative, it doesn't matter whether the Use Graphic column displays a green check mark or a red cross – the default button will still appear in the Query page.)

- 5. If you haven't yet done so, click **Query Form** to open that tab dialog to select a Query form (see Selecting a Query Form on page 6-192).
- 6. Click **Results Options** to open that tab dialog to set options for the Query results page (see Selecting a Presentation Option for a Query Results Page on page 8-71).
- 7. When you have set the necessary options on all three tab dialogs, click **OK** to return to the main window.

Because a Query page relies on a content server to function, you cannot test the Query page until you stage or publish your publication (and place all your translated output in a content server).

Query Reference Page

A Query reference page can add a powerful dimension to your Web publication by creating a search feature that can be used to locate information not only in your Web publication but also anywhere in the content server in which your Web publication resides.

You add the Query page to a publication just as you would any other reference page. You can place it in any frame of a frameset, if you want to, and associate it with any Query template (special Query templates are available if you want to use the same graphics set for a Query page as other body and reference pages in your publication).

You then set parameters for the searches that can be made from the Query page and also options for the results page you want to display.

Thus, creating a Query reference page is a two-part task, consisting of:

- Adding the reference page to a Web publication (see Adding a Reference Page on page 5-53).
- Setting parameters and options for the Query page and the results page (for the search).

The second task takes place on the Query tab dialog of **Globals**, which is available only after you have added a Query page to your publication. (It replaces the Page TOC tab dialog, which is available when you select any other reference page or source document in the Contents pane before opening **Globals**.)

After you create a Query reference page, you can add navigation buttons to it just as you would with any other reference page. For example, these could help you toggle between different reference pages in your Web publication.

If you are creating a Table layout, the Query icon is not available in the Components box of the Layout dialog box. With this type of layout, the Query reference page is automatically placed in the table cell reserved for body pages. You still add the reference page to the project in the Contents pane in the usual way.

Selecting a Query Form

A Query reference page (see Query Reference Page on page 6-191) can add a powerful dimension to your Web publication by creating a search feature that can be used to locate information not only in your Web publication but also anywhere in the content server in which your Web publication resides.

After you add a Query page to your publication, you then set parameters for searches on the page. This three-part task consists of:

- Selecting a Query form
- Choosing fields and buttons for the Query page
- Setting options for the Query results page

You set the parameters in the Query tab dialog in **Globals**. Most of the options are not enabled until you have set staging and/or publishing options, and thus identified a content server for the Web publication.

Use this process to select a Query form:

- 1. In the Contents pane, select the Query page and click **Globals** () on the standard toolbar.
- 2. Click **Query** to open that tab dialog (which is only available when you select a Query page in the Contents pane).
- 3. On the **Query Form** tab dialog, click **Use the following** to use the default script listed. (This script is available for any Content Server you are staging or publishing to.)

Alternatively, type in a script you want to use or click **Use the contents of this file** and provide the path and name of the file containing the script. (Clicking **Browse** provides access to the content server while clicking **Gallery** opens the Gallery as installed on your local drive with Content Publisher.).

- 4. Click **Fields and Buttons** to open that tab dialog to choose fields and buttons for the Query page (see Choosing Fields and Buttons for a Query Page on page 6-190).
- 5. Click **Results Options** to open that tab dialog to set options for the Query results page (see Selecting a Presentation Option for a Query Results Page on page 8-71).

6. When you have set the necessary options on all three tab dialogs, click **OK** to return to the main window.

Because a Query page relies on a content server to function, you cannot test the Query page until you stage or publish your publication (and place all your translated output in a content server).

Setting Options for a Query Results Page

A Query reference page (see Query Reference Page on page 6-191) can add a powerful dimension to your Web publication by creating a search feature that can be used to locate information not only in your Web publication but also anywhere in the content server in which your Web publication resides.

Once you add a Query page to your publication, you then set parameters for searches on the page. This three-part task consists of:

- Selecting a Query form
- Choosing fields and buttons for the Query page
- Setting options for the Query results page

You set the parameters in the Query tab dialog in **Globals**. Most of the options are not enabled until you have set staging and/or publishing options, and thus identified a content server for the Web publication.

Use this process to set options for a Query results page:

- 1. In the Contents pane, select the Query page and click **Globals** () on the standard toolbar.
- 2. Click **Query** to open that tab dialog (which is available only when you select a Query page in the Contents pane).
- 3. On the **Results Options** tab dialog, set the parameters for your Query by clicking the **Select** button in the Query Scope panel to open the Content Query Capture page.
- 4. Refine the fields to define the information that a user may search for in your Web publication and content server. You can refine the scope of only those fields you select in the Fields and Buttons dialog box.

Example If, on the Fields and Buttons tab dialog, you choose to show the Document Author field in your Query page, you can refine the scope of that field by selecting a specific author on the Content Query Capture page.

For the user to successfully conduct a search on the Query page, the Document Author field should either be left empty or the specific author name entered here should be used. Otherwise, the search will return no documents. A Webmaster might want to hide the field on the Query page. In that event, the restrictions set here will still apply. That is, any searches the user makes using other parameters will find only those Web pages that both satisfy those parameters and the restriction on Author set here.

Once you have refined the necessary fields, click Search (to display the current list of documents that would be available from your Query page). Then click Add Query to Project to confirm the scope of your Query page and return to the Results Options tab dialog.

The Query Scope panel will now display a summary of the scope you have set. If in the Content Query Capture page you do not refine any field in any way, you will see <Unrestricted Query> in this box. Click the **Clear** button to clear this box at any time and set a new scope for your Query page.

6. Under Query Results Presentations Options, click the **Select** button to open the Results Presentation Option dialog box. From the Name drop-down list, select the presentation format you want to use for the Query results page. (Your Content Server administrator creates these options.) A description of the presentation format and the text that will display in the results page appears below.

Text 1 and Text 2 typically include the Content ID and Title (the administrator can define the fields in different ways), and will appear in the Description column of the Query results page. This is the minimum amount of information (along with an icon that lets you jump to the Web page) that will appear.

- 7. Click **OK** to return to the Results Options tab dialog. Select the appropriate check boxes to determine what additional columns will appear in the Query results page.
- If you haven't yet done so, click Query Form to open that tab dialog to select a Query form (see Selecting a Query Form on page 6-192), and click Fields and Buttons to open that tab dialog to choose fields and buttons for the Query page (see Choosing Fields and Buttons for a Query Page on page 6-190).
- 9. When you have set the necessary options on all three tab dialogs, click **OK** to return to the main window.

Because a Query page relies on a content server to function, you cannot test the Query page until you stage or publish your publication (and place all your translated output in a content server).

Hyperlink Behavior

This section covers the following topics:

- Suppressing Cross-References in a Web Page (page 6-195)
- Specifying a Target for External Hyperlinks (page 6-195)
- Relinking Hyperlinks in Output Pages (page 6-196)
- Omitting Hyperlink Targets for Promoted Elements (page 6-197)
- Retaining Links to Documents Stored in Content Server (page 6-197)

Suppressing Cross-References in a Web Page

The global settings available to enhance the look of Web pages include the option to include or suppress cross-references.

Site Builder automatically includes cross-references in Web pages and retains the links inserted in the source document. But you can suppress the cross-references, if you want.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Clear the **Include cross references in output** check box.
- 4. Click OK.

The cross-references are no longer linked to the target text in the Web page (but they remain linked in the source document).

Specifying a Target for External Hyperlinks

You may want to include a link from your Web site to an external location, such as an altogether different Web site. When you include this type of external hyperlink, you may want the site that is referenced in the link to open in a separate browser window. When this occurs, those viewing your Web site retain their place on your site and can simply close the window of the external site without losing their connection to your site.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (on the toolbar.
- 2. Click **Options** to open that tab dialog.

- 3. Under Include cross-references in output, select **Use this target for external hyperlinks**, and enter **_blank** in the text box.
- 4. Click OK.

You can enter any standard HTML target into the text box depending on what you want to do:

- blank opens a new browser window that is separate from your Web site
- parent opens the document in the frameset parent of the current document
- self opens the document in the same window that contained the page with the link, so the current page is "overwritten"
- _top opens the document in the full browser window, replacing any frameset your Web site may have

Relinking Hyperlinks in Output Pages

The global settings available to enhance the look or functionality of Web pages include the option to relink hyperlinks.

Site Builder preserves hyperlinks in source documents where the document containing the hyperlink and the target document are both part of the same project. This is done automatically thanks to a default setting in **Globals**. In the event that you have to reset this option, do the following.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click **Include cross-references in output** and also **Hyperlinks within project** relinked in output pages.
- 4. Click OK.

If different templates are used for the source and target documents, the above steps must be completed for both templates.

If you would like to retain hyperlinks between documents that are stored in Content Server, see Retaining Links to Documents Stored in Content Server (page 6-197).

With the hyperlink option set in **Globals**, Site Builder will preserve other types of links, too. For example, any hyperlink that targets a URL or uses the Mailto: function will be recognized by Site Builder in the output pages (the Mailto: link can only be activated if your browser includes a mail option). However, to create a hyperlink to a document in its

native format, you must copy this document to the appropriate output directory for the hyperlink to succeed. The best way to do this is to treat the target document as an associated file. See Associating a File With a Publication (page 5-99).

Different applications have different settings. You may need to experiment with hyperlinks in your source documents to see what works.

The Options tab dialog in **Globals** also contains the option **Strip path from external hyperlinks**. This check box is cleared by default. It is potentially useful if you choose to move your target document to a relative or absolute network path on your intranet.

Omitting Hyperlink Targets for Promoted Elements

Elements that are promoted to a reference page (TOC, Index, etc.) will include an anchor tag so that a user can easily navigate back to the original document or, more importantly, a section of that document.

You can remove this hyperlink target if you do not want it to interfere with your Web page layout, such as an HTML table, or a scripting interpretation of your Web page, such as XML.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Select the **Omit hyperlink targets for promoted elements** check box.
- 4. Click **OK**.

Retaining Links to Documents Stored in Content Server

Retaining links between documents on the file system is handled automatically by Site Builder, thanks to a default setting in **Globals** (see Relinking Hyperlinks in Output Pages on page 6-196).

When creating a hyperlink to a document stored in Content Server, you have several options:

- Using a Content Server URL to Create a Hyperlink (page 6-160)
- Using a Content ID to Create a Hyperlink (page 6-162)
- Using a Document Title to Create a Hyperlink (page 6-161)

Text and Background Color

This section covers the following topics:

- Setting Colors for a Web Page (page 6-198)
- Selecting a Graphics Set for a Web Page (page 6-198)
- Selecting a Background Graphic for a Web Page (page 6-199)

Setting Colors for a Web Page

The global settings available to enhance the look of your Web publication include the option to set colors for the text, links, and background of Web pages.

- 1. In the Contents pane, select the template you want to edit and click **Globals** (...) on the toolbar.
- 2. Click **Colors** to open that tab dialog.

There are four color options plus a fifth choice that enables you to use a graphic instead of a color as the background for the Web page.

3. To select a background color, click the Background check box and the click the **Color button** to open the Color dialog box. Select any color, and then click **OK** to return to the Color tab dialog.

The color you selected appears in the color bar and can also be viewed in the Sample box.

4. Choose additional colors for other components of the Web page, if you want. The Sample box will show the result of each color choice.

You can also select a background graphic, instead (see Selecting a Background Graphic for a Web Page on page 6-199). Or you can use a background color with a background graphic, if the graphic is transparent.

Selecting a Graphics Set for a Web Page

The global settings available to enhance the look of Web pages include the option to select one of the 28 graphics sets supplied with Site Builder.

Making one of the graphics sets the default Set for a particular template ensures the consistent use of navigation buttons and visual aids for all the Web pages created with that template. You can switch between Sets at any time to dramatically alter the look and feel of your Web pages.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Set** to open that tab dialog.
- 3. The Set text box displays the name of any Set currently selected for the template. Click **Gallery** to open the Gallery dialog box.
- 4. Select the Set you want to use. The graphics from the Set will appear in the Preview window.
- 5. Click Make Default. The name of the selected Set is now in bold.
- 6. Click **OK** to return to the Set tab dialog.
- 7. Click **Apply Set Selection**. This will change all graphics currently specified in the template.

A dialog box appears and asks you to confirm your selection of the Set. Click Yes.

8. Click **OK** to return to **Globals**.

If you make a graphics set the default for a particular template, the background graphic from that Set will automatically be applied by Site Builder to all Web pages created with that template. You can change or turn off the background graphic in the Colors tab dialog of **Globals**.

Selecting a Background Graphic for a Web Page

The global settings available to enhance the look of your Web pages include the option to add a background graphic. You can choose a graphic from the selection of GIFs shipped with Site Builder.

- 1. In the Contents pane, select the template you want to edit and click **Globals** () on the toolbar.
- 2. Click **Colors** to open that tab dialog.
- 3. Click Use a background graphic.

If you have picked a graphics set from the Gallery and made it the default, the background graphic from this Set will automatically display in the Sample box and the path to the GIF will display in the File Name text box.

- 4. If you have not picked a graphics set, or want to select another graphic, do one of the following:
 - Enter the path and file name of the graphic you want to use, or
 - Click **Browse** to choose a repository and locate the file you want to use, or

- Click **Gallery** and choose a graphic from the Backgrounds group of graphics.
- 5. Click OK.

You can use a background color instead of a graphic, if you want. See Setting Colors for a Web Page (page 6-198). You can also use a background color with a background graphic, if the graphic is transparent.

If you select a file from Content Server (step 4), you can click the **Info** button (**[1]**) at any time to view the Content Information page for that file (if, say, you want to select another version of the file).

Other Web Page Settings

This section covers the following topics:

- ✤ Adding an Address to Your Web Page (page 6-200)
- Adding an E-Mail Address to Your Web Page (page 6-201)
- ♦ Adding Titles to a Web Page (page 6-201)
- Displaying Headers and Footers in a Web Page (page 6-202)
- Including Revision Information From Source Documents (page 6-203)
- Preserving Links to Embedded OLE Objects (page 6-203)
- Setting the Order of Navigation and Visual Aids in a Web Page (page 6-204)
- Skipping Single Hard Carriage Returns (page 6-205)
- Suppressing Footnotes and Endnotes in a Web Page (page 6-205)
- Adding Options to a Web Page (page 6-206)
- Suppressing Tables in a Web Page (page 6-206)

Adding an Address to Your Web Page

The global settings available to enhance the look of your Web page include the option to add an address to Web pages.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click Address to open that tab dialog.
- 3. Under Address Lines, click **Include Address**. In the four text boxes, enter the information you want to display in your Web page. It will appear at the end of the

page. The address can contain any kind of information. For example, you might enter a copyright line here.

4. Click OK.

You can format the address by using Address (System), the special element that is automatically a part of every template in Site Builder. However, the address will always appear in italic because that is how browsers interpret the <ADDRESS> tag that Site Builder applies to this information. If you don't want the address to appear in italic, you can apply the <P> tag, instead, to this content.

Adding an E-Mail Address to Your Web Page

The global settings available to enhance the look of Web pages include the option to add an email address.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click Address to open that tab dialog.
- 3. Under Email Lines, click Include Email Address.
- 4. In the Email Prompt text box, enter the text you want to appear on the Web page to signify an email link.
- 5. In the Email Address text box, enter the complete email address you want to use.
- 6. Click OK.

You can format this email address by using Email (System), the special element that is automatically a part of every template in Site Builder.

Adding Titles to a Web Page

The global settings available to enhance the look of Web pages include the option to add titles. Site Builder lets you place the titles in both the title bar of the Web browser and the body of the Web page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Titles** to open that tab dialog.
- 3. Under Title Placement, click Place a title in the body of the Web pages.

If you also want to the title to appear in the title bar of your Web browser, click **Place a Title in the title bar of the Web browser**. When you create a frameset for a

publication, the frameset title, as set in the Frameset Properties dialog box, appears in the browser title bar.

- 4. Under Title Contents, click the appropriate check boxes to decide which components you want to use to create the title. Select any number of check boxes.
- 5. Site Builder combines the components you select into one title.
- 6. Under Document Component of Title (if you checked the appropriate box in step 4), decide whether you want the title to come from an element (click the appropriate radio buttons for the Title element or select an alternative element from the drop-down list) or from the Title entry in the Document Properties dialog box (click the last radio button).
- 7. Under Page Component of Title (if you checked the appropriate box in step 4), decide whether you want to use content derived from an element (select from the drop-down list) or type a title in the text box.
- 8. Under Page Numbering, select None or one of the numbering options available if you want to add this component to the title.
- 9. Click OK.

By default, the Title (System) element for a body page template consists of the document title. For a reference page template, it consists of the publication title plus the document title.

You can format the title by using Title (System), the special element that is automatically a part of every template you create in Site Builder.

Displaying Headers and Footers in a Web Page

The global settings available to enhance the look of your Web page include the option to place headers and footers in output pages. Site Builder does not automatically include headers and footers in Web pages, but you can display them, if you want.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click **Include headers in output** if you want to include headers in the output pages.
- 4. Select **Place on all pages** or **Place on first page only**. You may want to choose the second option if you're splitting a source document into several Web pages.

- 5. Click **Include footers in output** if you want to include footers in output pages. Again, select **Place on all pages** or **Place on first page only**.
- 6. Click OK.

Including Revision Information From Source Documents

The global settings available to enhance the look of Web pages include the option to include revision information in output pages.

By default, if a source document contains text that has been inserted or deleted with revisions turned on, Site Builder will implement the revisions in the output Web page. That is, the Web page will look the same as if the revisions had been accepted in the source document before translation. You can, instead, display the revisions just as they are in the source document.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** (()) on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click Include revision information from source documents.
- 4. Click OK.

Site Builder maps inserted text to underscore and deleted text to strike through. You can change this mapping, if you want. (See Changing Text Effects on page 6-129.)

Site Builder does not retain any colors associated with inserted or deleted text in the source documents.

Preserving Links to Embedded OLE Objects

The global settings available to enhance the look of Web pages include the option to preserve links to embedded OLE objects. This option is available only for OLE objects embedded in a Word or Excel source document.

If such a document contains an OLE object, Site Builder will create not only an output graphics file as a graphical representation of the object, but also a file for the linked object itself. It will then attempt to link the graphical representation of the object in the output Web page to that file. If that object-type is supported by the browser, clicking the graphic will display the object in its native format (assuming the appropriate application is installed on the user's machine).

Example If you embed a portion of an Excel spreadsheet in a Word 97 document, Site Builder will turn the embedded object into a graphic in the Web page you create and also

create a **.xls** file for the linked object itself. Clicking the graphic will open the spreadsheet (.xls file) in its native format.

Note: You must be sure to embed the object in the source document, and not link it to its source. That is, in the source document itself, you must turn off the options "Float Over Text" and "Link to File" for the object. Also, in Site Builder, you must preserve links to embedded OLE objects.

To preserve links to embedded OLE objects:

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click the Preserve links to embedded OLE objects where possible.
- 4. Click OK.

The link will only be preserved if the program used to create the object supports OLE. The link will not work if your browser doesn't support such links.

Setting the Order of Navigation and Visual Aids in a Web Page

The global settings available to enhance the look of Web pages include the option to set the order of navigation and visual aids in Web pages.

When you create a Web page, you may add navigation buttons bars or text bars, separators or rules, HTML or scripting code, and a regular or email address. Your source document will probably have a title and may also have headers and footers.

You can set the order of all of these for your Web page.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click Layout to open that tab dialog.

All possible navigation and visual aids appear in the two Preview windows, including ones you may not be using. You can use a different order for the same aids at the top versus the bottom of the page. You can also change the alignment of the items.

3. In the Preview pane for Top of Page, select the navigation aid, separator, or rule that you want to move, and use the Reorder arrows to change its order in the sequence. Or select the navigation aid, separator, or rule, and with the mouse button held down, drag and drop the item to reposition it.

- 4. To change the alignment of the navigation or visual aid, select the item and with the mouse button held down, drag and drop the item so that it is flush left, centered, or flush right in the pane. The cursor changes as you drag the image, indicating the Left, Center, or Right alignment.
- 5. Do likewise in the Preview window for Bottom of Page, if you want to reorder items there, too.
- 6. Click OK.

Skipping Single Hard Carriage Returns

The global settings available to enhance the look of Web pages include the option to skip single hard carriage returns. This may be useful if your source document is in ASCII format.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click the **Skip single hard carriage returns** check box.
- 4. Click OK.

Suppressing Footnotes and Endnotes in a Web Page

The global settings available to enhance the look of your Web page include your ability to control the display of footnotes and endnotes.

Site Builder automatically includes footnotes and endnotes in your Web pages. But you can suppress them, if you want. Site Builder also automatically places endnotes in their own page. You can change that, too.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Clear the Include footnotes and endnotes in output check box.
- 4. Click OK.

You should also ensure that any elements associated with footnotes and endnotes are not included in the body of your Web pages. Open **Element Setup** and check the status of any such elements in the Elements tab dialog.

Adding Options to a Web Page

The global settings available to enhance the look of Web pages include the option to place headers and footers in output pages. You can also suppress footnotes and endnotes, if you want, as well as cross-references and tables.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar.
- 2. Click **Options** to open that tab dialog.
- 3. Click or clear each check box that applies.
- 4. Click OK.

Suppressing Tables in a Web Page

The global settings available to enhance the look of Web pages include the option to include or suppress tables. Site Builder automatically includes tables in Web pages. But you can suppress them, if you want.

- 1. In the Contents pane, select the template that you want to edit and click **Globals** () on the toolbar to open that property sheet.
- 2. Click **Options** to open that tab dialog.
- 3. Clear the **Include tables** check box.
- 4. Click OK.

Tables in the source document will no longer appear in the Web page.

If the intent is to provide files that will display properly in those browsers that do not support tables, you will also need to turn off certain formatting options. That's because Site Builder uses tables to position certain graphical elements on a Web page. For example, the following will be affected if you suppress tables and are using such a browser:

- ✤ Any bulleted lists with graphical bullets
- Element button bars where the buttons are placed on the same line as the element.
- ✤ Icons that are set "away from content."

PREVIEWING WEB PAGES

This section covers the following topics:

- Viewing Web Pages (page 7-1)
- Setting Up a Viewer (page 7-2)
- Previewing Web pages (page 7-3)
- Installing Internet Explorer (page 7-3)
- Changing the Preview Document (page 7-4)
- Previewing a Source Document (page 7-4)
- Previewing in Netscape Navigator (page 7-5)
- Preview Fail (page 7-5)

VIEWING WEB PAGES

When you install Site Builder, the Installer searches for Microsoft Internet Explorer and Netscape Navigator on your machine and associates both browsers with the program. You can associate additional browsers with Site Builder and also utilities such as Notepad.

All viewers associated with Site Builder are available from the Viewers menu. You can also click the down arrow to the right of the default viewer name on the large toolbar to display a popup menu from which you can choose the viewer you want to use.

To view Web pages click **Launch Viewer** on the Viewers menu or click **Viewer** on the standard toolbar or large toolbar.

To switch viewers, right-click the Viewer icon on the large toolbar and choose the viewer you want to use from the popup menu. (You can also choose Setup from the Viewers menu.)

If the viewer you want to use isn't currently associated with Site Builder, choose Setup from the Viewers menu and add the viewer in the Viewers Setup dialog box.

If multiple output files are selected in the Contents pane, the default browser will display the first file selected. If no files are selected, the browser will display the first file listed. (To clear your selection of one or more pages, click the Contents pane below the list of files.)

If your Web publication has a frameset, it won't matter what you select – the default browser will open all frames, with the main frame displaying the opening body page of your publication.

If your frameset specifies frames for a TOC or an index, and you haven't added a TOC or index to your publication, the frameset will include an empty frame.

The Viewer button is based on the default viewer. The icon will change when you change the viewer.

SETTING UP A VIEWER

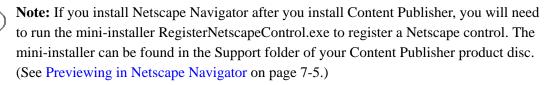
You can associate a new Web browser or other viewer with Site Builder at any time.

- 1. From the Viewers menu, choose Setup.
- 2. In the Viewers Setup dialog box, click Add to open the Viewer Properties dialog box.
- 3. In the File Name text box, enter the path and name of the executable of the Web browser or editor you want to associate with Site Builder, or click **Browse** to locate and select the executable file.
- 4. In the Description text box, enter the name or phrase you want to use as a label for the viewer. This will display on the Viewers menu, the large toolbar opposite the View button, and the popup menu that appears when you click the down arrow to the right of the default viewer name on the large toolbar.
- 5. Click **OK** to return to the Viewers Setup dialog box, and **OK** again to return to the main window.

PREVIEWING WEB PAGES

You can preview the Web pages you create in the Choose Template, Edit Template, and Layout dialog box. The translations you see in the Preview windows are temporary. You must still return to the main window to translate a publication once you finish editing the templates in the publication.

To preview your Web pages, you must have Microsoft Internet Explorer version 4.0 or higher or Netscape Navigator version 6.01 or higher installed on your machine. If you have both browsers installed, you can toggle between them by using the IE and Netscape radio buttons at the top of each dialog box. (In the case of the Layout dialog box, the options are only available when you are in the Preview Mode.)



When you first add a document to a publication and choose a template in the Choose Template dialog box, the document has not yet been imported. As a result, the preview may not show the full effect of the selected template. This is especially so for styles such as Title, Heading 1, and Heading 2 (assuming you're importing styles). When you click OK, styles (or patterns) will be imported from the document and you'll return to the main window. If you then select the document and open the Edit Template dialog box, the preview you see now will give you a better idea of how your Web page will look once you translate the document.

INSTALLING INTERNET EXPLORER

For Content Publisher to talk to Content Server, Internet Explorer version 4.0 or higher must be installed on each machine on which either Site Builder or Site Server is installed. Internet Explorer is also required in order to display previews of your Web pages in Site Builder.

CHANGING THE PREVIEW DOCUMENT

The Change Preview dialog box lets you preview the effects of changes to a template for any source document the template is associated with. You can enter this dialog box from either the Edit Template dialog box or the Preview tab dialog on the Pattern Properties tab dialog.

- 1. From the list of source documents, select the document you want to preview instead.
- 2. Click OK.

If you are returning to the Edit Template dialog box, the document selected will appear in the Preview window. If you are returning to the Preview tab dialog in Pattern Properties in **Element Setup**, you will see the first instance of the pattern selected. The Preview window will be empty if the selected document contains no instances of the selected pattern.

PREVIEWING A SOURCE DOCUMENT

You can preview a document as it is being checked into Content Server to see how the document will look when converted into HTML format. You can do this for an individual document in your project or for a document that is part of a Directory Item.

For previews to be possible:

- At check-in, a source document that is to be part of a Directory Item must be assigned document information that will make the document part of the query used to create Directory Item
- The Directory Item must be "restricted" (see Creating a Restricted Directory Item in Content Server on page 5-29).
- The project must be registered on the content server that the document is being checked into (see Registering a Project to Preview a Source Document on page 8-76).
- Content Server must be configured for HTML previews and you must install DtmServer on any machine on which Site Server is installed. To learn more about configuring Content Server and installing DtmServer, see the DTM Server and HTML Preview Administration Guide.

In the case of an individual source document, previews at check-in will only be possible once the document has been added to the project and therefore been associated with a project template.

PREVIEWING IN NETSCAPE NAVIGATOR

You can preview your Web pages in Netscape Navigator as well as Internet Explorer.

The preview option is available in the Choose Template, Edit Template, and Layout dialog boxes. Two radio buttons – IE and Netscape -- let you toggle between the two browsers, assuming you have both browsers installed. The radio buttons are at the top of each dialog box. (In the case of the Layout tab dialog, they are visible only when you click the Preview Mode button.)

This preview capability is available only if you are running Netscape Navigator version 6.01 or higher on your machine.

If you are running version 6.01, the Installer will recognize this version when you install Content Publisher and will automatically activate the Netscape radio button on these dialog boxes.

If you install version 6.01 or higher after you install Content Publisher, you need to run a mini-Installer program to register a Netscape control that will activate the radio button to permit previewing in this browser. The mini-Installer, RegisterNetscapeControl.exe, is available in the Support folder on your Content Publisher product disc.

PREVIEW FAIL

Sometimes an error message displays when you try to preview a source document in the Preview window in the Edit Template dialog box or Choose Template dialog box.

Several reasons may explain why Site Builder is unable to complete a temporary translation of the source document in order to provide a preview. The source document may have been moved, its name may have been changed, the file may be corrupted, or the file may be in an unsupported format. A full translation of the file may help you identify the problem.

Do the following to determine why a preview has failed:

- 1. Click **OK** to return to the main window.
- 2. Choose Application Options from the View menu to open that dialog box.
- 3. Under Logging, be sure that logging is set to 5, the highest level.
- 4. Check the text box for the path and name of the log file you want to generate.

- 5. Click OK.
- 6. In the main window, click **Translate All** on the toolbar.

Open the log file for information on why a specific file failed to translate.

Chapter

8

PUBLISHING THE SITE

This section covers the following topics:

- The Publishing Process (page 8-1)
- The Dual Publishing Model (page 8-2)
- Staging a Project (page 8-3)
- ✤ Workflow (page 8-12)
- Publishing a Project (page 8-14)
- Scheduling a Project for Publishing (page 8-22)
- Document Information (page 8-49)
- Publishing to a File System (page 8-54)
- Publishing to an FTP Server (page 8-60)
- Publishing to an HTTP Server (page 8-64)
- Publishing to Content Server (page 8-68)

THE PUBLISHING PROCESS

The publishing process involves translating source documents in a project and then copying those translated documents to a Web server (file system, FTP, HTTP, or Content Server).

The publishing process consists of two distinct activities:

- Translating (see Translating Source Documents on page 5-41), which includes updating the Web publication (see Updating Source Documents in Content Server on page 8-70)
- Staging (copying the translated output to the staging server, see Stage Command on page 8-6) and publishing (copying the translated output to the publishing server, see Publish Command on page 8-15) the Web publication

For more information on staging and publishing in Content Publisher, visit The Dual Publishing Model on page 8-2.

Translating, staging, and publishing can all be automated using Site Scheduler and Site Server (see Automated Publishing in Site Server on page 8-25).

THE DUAL PUBLISHING MODEL

Content Publisher includes a two-part publishing system—staging and publishing. By staging your Web publication, you (or a content reviewer) can first preview the Web site before going "live" with it.

This dual publishing capability can be setup in the Staging/Publishing Options dialog box of Site Builder. Using this dialog box, you can designate a staging and publishing server. The staging and publishing server can be a file system, FTP, HTTP, or Content Server (but you must use the same type of destination for both staging and publishing).

Dual publishing facilitates a formal review process for your Web site. Typically, this can be done in the following steps:

- Designate a staging server (the preview location) and a publishing server (the final Web site) in the Site Builder Staging/Publishing Options dialog box (see Staging and Publishing Options on page 8-10).
- Specify the metadata that you would like associated with your Web pages, both on the staging server and the publishing server (see Specifying Document Information on page 8-49). You may also choose to inherit metadata from your source documents.
- Register your project on the staging server (see Registering a Project on a Staging Server on page 8-77) and create a staging criteria workflow for your content authors and content reviewers (see Workflow and Registration on page 8-12).
- Stage and publish the Web publication (see Stage Command on page 8-6 and Publish Command on page 8-15).

STAGING A PROJECT

This section covers the following topics:

- Confirming Staging Options (page 8-3)
- Setting Staging Options (page 8-4)
- Staging a Project (page 8-5)
- Stage Command (page 8-6)
- Staging Options (page 8-6)
- Reviewing Outstanding Problem Reports (page 8-8)
- Unregistering a Project on a Staging Server (page 8-8)
- Update Versions Command (page 8-9)
- Updating a Linked Publication (page 8-10)
- Staging and Publishing Options (page 8-10)
- Setting Staging and Publishing Options for Graphics and Gallery Graphics (page 8-11)
- Incremental Publishing (page 8-11)
- Publishing With Errors (page 8-11)
- The Incremental Database (page 8-12)

Confirming Staging Options

Each time you Stage a project, the Confirm Staging Options dialog box will open, assuming you have set staging options:

- To accept the information, click **OK** and Site Builder publishes to the staging server. That is, it copies the translated output from the file system to Content Server, as specified in Staging Options.
- To change the information, click Cancel, and then return to the Staging Options dialog box to specify different options.

If you click Stage before specifying the locations, the Staging/Publishing Options dialog box will open so you can provide the required information.

Each time you use the Stage command, Site Builder performs an incremental staging. It first creates new output files for any new source documents added to the project since the last time you staged. It then replaces, as necessary, previously staged files that have been updated since the last time you published. Finally, it deletes previously staged files for those source documents that are no longer part of the project.

Setting Staging Options

Staging is the process whereby Site Builder copies translated output from the file system to a staging location for review before the finally approved content is published to the publishing server (Web site).

You must set staging options in order to stage your project. If you are staging to Content Server, you must at least designate a staging server and specify document information.

Follow these steps to designate the staging server:

- 1. With your translated project open in Site Builder, click **Staging Options** on the Run menu to open the Staging/Publishing Options dialog box.
- 2. From the Repository drop-down list, select the type of location you want to stage to: Content Server, file system, FTP site, or HTTP site.
- 3. Click the Browse button opposite Pages.
- 4. If you are staging to Content Server, the Staging Options dialog box will open. If you have configured more than one content server, click the **Content Server** button to open the **Choose a Content Server** dialog box, and select the content server you want to stage to. (If you have only one content server configured, it will already be selected.) Then see below for specifying document information.
- 5. If you are staging to the file system, the Select Publish Directory dialog box will open. Locate the directory you want to stage to, click **Open**, and then click **OK**.
- 6. If you are staging to an FTP or HTTP site, the Publish Destination dialog box will open. Complete the required information in the dialog box and click OK. (See Specifying Staging and Publishing Options for an FTP Site on page 8-61 and Specifying Staging and Publishing Options for an HTTP Site on page 8-65.)

If you are staging to Content Server, the same content server is now designated for all three types of output: pages, graphics, and Gallery graphics. You can use different content servers for the other two, if you want, though this is unlikely to be useful.

Part of your publication will consist of files for frames, reference pages, etc., that are generated by Site Builder during translation. Since these output pages can't inherit from

source documents, you must specify document information so that these files can be checked into the content server that is used for staging.

This document information will be used, by default, for body pages, too—unless you designate property values and security settings to be inherited from the source documents.

- 1. Once you have designated a content server, click the **Document Information** button to open that dialog box.
- 2. Change or complete the other fields to set the document information you want to associate with the staged output. This can include custom document information specific to an organization.
- 3. Click the Assign Info button to return to the Staging Options dialog box.
- 4. Click OK to return to the Staging/Publishing Options dialog box.

See Staging Options (page 8-6) for additional tasks you might want to perform in the Staging Options dialog box, such as registering the project to facilitate workflow.

Staging a Project

Staging is the process whereby Site Builder copies translated output from the file system to a staging server for review before the finally approved content is published to the publishing server (Web site).

You can, in fact, by-pass staging and go straight to publishing. But a review is advisable if only because there likely will be some features of your Web site that can be checked only once you have staged (or published) your project.

For example, staging offers you the first chance to check any Query reference pages or dynamic content in your project. It also provides an opportunity to inherit document information from source documents and place it in output Web pages and to check conditional disclosure for the first time.

Generally, it is wise to stage your project. If you choose to stage, you can do three things independently:

- Create staging criteria workflow
- Register the project and create "problem reports"
- Add a special icon to each Web page to provide direct access to the Content Information page.

You can thus create problem reports without creating staging workflow—and workflow without problem reports. You can also stage without using either workflow or problem reports (or placing the special icon on output pages).

You will require sub admin rights to stage a project (use the Stage command).

Stage Command

Staging is the process whereby Site Builder copies translated output from the file system to a staging server for review before the finally approved content is published to the publishing server (Web site).

You must set staging options in order to stage your project. At a minimum, you must designate a staging server and specify document information.

Follow these steps to stage a project:

- 1. Click Stage on the Run menu or Stage on the standard or large toolbar.
- 2. The Confirm Staging Options dialog box opens, to ask you to confirm your options. To accept the information, click OK. Site Builder stages the project. To change any information, click Cancel and return to the Staging/Publishing Options dialog box.

If, when you click Stage, you haven't already specified the required information, the Staging/Publishing Options dialog box will open instead.

When you click **OK**, Site Builder copies all translated output from your file system to the staging server. If your Web publication includes Query reference pages, these will be active for the first time on the staging server. And if you have decided to create staging workflow (and have registered the project), workflow will begin as soon as the project is staged.

You will require sub admin rights to stage a project (use the Stage command).

It's always wise to update (and re-translate) your project before you stage. See Updating Source Documents in Content Server (page 8-70).

Staging Options

You must set staging options in order to stage your project. The staging options you set apply only to staged output. Once you have reviewed your staged Web publication and are ready to publish, you must set publishing options. (Although you set the options separately, you should generally set them the same way.) You set staging options by completing the following tasks. The first two are required:

- Identify the staging server, that is, the content server you want to use to stage your translated output
- Specify document information to be used, by default, for all output Web pages so that your output can be checked into the staging server (required, even if you choose to inherit properties from source documents, to ensure that those pages that do not originate in the source server are assigned document information)
- Specify properties you want your body pages to inherit from their source documents instead of using the default document information (see Inheriting Document Information From Source on page 8-50). (This is optional.)

The document information you specify is default information that will be used for all output pages, in particular, files for frames, TOCs, etc., that are built by Site Builder and do not have their origin in Content Server. If you specify property values and security settings that you want your body pages to inherit from their source documents, the inherited values will prevail for all body pages.

Example: If the name of Author A is inherited from a source document and the name of Author B is specified for the output pages generated from that source document, only the name of Author A will be retained by Content Server.

- Register the project on the staging server to facilitate workflow (see Registering a Project on a Staging Server on page 8-77). (This is optional.)
- Suppress placement of the special Info icon on output Web pages (see Suppressing the Info Icon on Web Pages on page 8-72). (This is optional.)
- Generate document names from file names (optional) if you would like to publish to the content server without a unique suffix (see Publishing to the Content Server Without a Unique Suffix on page 8-81). When this option is selected, only the file name, with its prefixes (if added), is published to the staging server. This is used most often when adding a prefix to output file names to help generate predictable file names (see Adding a Prefix to Output File Names on page 8-79).
- Set check-in file extensions if you would like to check in files with an extension other than the default hcsp extension when you publish to the staging server (see Setting Check-In File Extensions on page 8-82). (This is optional.)

Reviewing Outstanding Problem Reports

When you try to publish a project in Site Builder when there are still some open staging workflow (some documents in staging workflow have not been approved) and/or outstanding problem reports, the Publish Warnings dialog box opens to alert you. You can click **Yes** to publish anyway, and might want to do so if you know that the workflow and problem reports are insignificant.

In most instances, you will want to review the workflow and problem reports.

Follow these steps to review open problem reports:

- 1. Click the appropriate More Info button in the Publish Warnings dialog box to open the Open Problem Reports dialog box. This dialog box lists all the problem reports outstanding for the project you want to publish.
- 2. Double-click any problem report to open the Problem Report Information dialog box for that problem report.

The Problem Report Information dialog box provides a complete summary of the problem report, including the original message compiled by a reviewer to summarize the problem.

3. Click **OK** when you have reviewed the information.

Unregistering a Project on a Staging Server

Once you register a project, you have to be careful about unregistering it. If you decide to unregister a project -- that is, clear the Register the Project check box in Staging options -- the following warning will appear:

Stellent	Content Publisher
1	Deselecting this checkbox after your project has been registered will result in the following 1. All previously staged documents will be deleted. 2. All problem reports logged against this project will be deleted. 3. All workflows associated with this project will be deleted.
	Are you sure you want to unregister this project?
	Yes O

Figure 8-1 Registration warning

There may be an advantage to unregistering a project if you simply want to start again from scratch. However, if your goal is the temporary one of staging your project without triggering workflow, the better solution would be to disable all criteria workflow associated with the project. (The special Content Information page will still be created, but you can simply ignore the problem report section if you don't want to use it.)

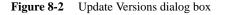
Update Versions Command

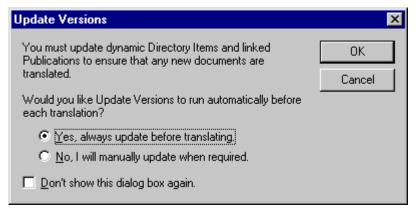
The Update Versions command is used to update source documents before translation. You don't need to use it each time you translate, but you will want to be sure to update your project at critical times, especially before staging and publishing.

Except for single source documents on the file system, the command is required to update Directory Items (including dynamic Directory Items), and source documents from Content Server, or from an FTP or HTTP site. If your project contains single source files on the file system (those not part of a Directory Item), Site Builder recognizes when any of these have changed and automatically includes the revised files in the next incremental translation.

Site Builder doesn't check documents out of Content Server. Rather, it identifies the version current during project setup and obtains a copy of that version for all translations. Update Versions identifies the latest version of a document available so that Site Builder can use that for your final translation before publishing to a content server. (See Updating Source Documents in Content Server on page 8-70.)

By default, the Update Versions dialog box displays when you first click **Update Versions** on the standard toolbar (





Click **Yes, always update before translating** and **Don't show this dialog box again** to automate the command in Site Builder. In that event, Site Builder will automatically run

the Update Versions command each time you translate. If you prefer, you can choose to update manually each time by clicking **No, I will manually update when required.**

The Update Versions command also applies to linked templates (after the template has been brought into a project and edited) In the Manage Templates dialog box, you can select the linked template and click the **Update Versions** button. Alternatively, in the Content pane, you can right-click a document associated with the linked template and select **Update Versions** and then **Templates** (or **Document and Templates**) from the popup menu.

You can update source documents selectively in Site Builder by right-clicking a publication in the Publication Hierarchy pane and choosing **Update Versions** from the popup menu, or right-clicking a Directory Item or document in the Contents pane and choosing **Update Versions** and then **Documents** from the popup menu.

Site Server automatically updates all source documents for projects that have been scheduled for translation on the server.

If you have selected **Don't show this dialog again**, you can always display dialog box again by opening the Applications dialog box (from the View menu) and selecting the **Show the Update Versions dialog box before translating** on the Dialogs tab dialog.

Updating a Linked Publication

A linked publication cannot be changed from within a master project. It must be opened separately, by itself, in Site Builder, and the Update Versions command used to update the contents of the project.

Once the linked publication is updated, you must then use the Update Versions Command (page 8-9) the next time you open the master project for changes in the linked publication to be reflected in the master project.

Staging and Publishing Options

In the Staging/Publishing Options dialog box you can set both staging and publishing options for your project.

You can use staging options without publishing options, and publishing options without staging options. Typically, however, you will first want to stage your project so that you can review your Web publication before publishing it—that is, going live to your Web site.

Setting Staging and Publishing Options for Graphics and Gallery Graphics

When you set staging or publishing options for a project, you can assign unique locations and document information for your pages, graphics, and Gallery graphics. Generally, you will choose the same location and document information for all three types of Web output.

See Setting Staging Options (page 8-4) and Setting Publishing Options (page 8-19) for more information

Incremental Publishing

Content Publisher publishes incrementally. Say you have already published and decide to update source documents and therefore the translated output in the staging area. When you retranslate and click Publish, Site Builder will copy only the revised output files from the staging area to the location designated for published output. It will preserve the original document IDs in the process.

If you publish to another instance of Content Server, your output will be totally republished and new document IDs will be created.

The Update Versions, Translate, and Publish commands work differently when you schedule a publication for translation by Site Server.

Publishing With Errors

The Publish with Errors setting in the Project Options dialog box allows you to publish with errors even when Site Builder encounters problems during translation. The option is turned off by default.

The option is designed especially for situations where a file in an unsupported format inadvertently has been added to a Directory Item. With this check box selected, Site Builder will simply skip this file and complete the translation and publishing process as if the file wasn't in the Directory Item at all. (Its failure to translate the file will be noted in the Log file.)

To publish with errors:

- 1. Click **Project Options** on the View menu to open that dialog box.
- 2. In the General tab dialog, under Publish with Errors, select the **Allow publishing even** if errors occurred during translation check box.

3. Click OK.

The option is particularly useful with Site Server, where the Update Versions, Translate, and Publish commands are handled automatically.

The Incremental Database

The incremental database is a series of temporary files created by Site Builder that are used to track promotion data, file dates, etc., so as to allow incremental translations to take place.

When you create a project and initially translate it, Site Builder creates a subdirectory and places temporary files in the subdirectory that summarize information about the timestamps in the project.

Site Builder updates the database each time you change the promotion data by creating new temporary files. Should you delete these temporary files, Site Builder will simply run a full translation (even if you choose an incremental one) and create new temporary files.

When you close your project, Site Builder incorporates the incremental database information into the history file. Thus, if you move the project file and history file to another machine, Site Builder does not have to (and does not) run a full translation the next time you translate.

WORKFLOW

This section covers the following topics:

- Workflow and Registration (page 8-12)
- Reviewing Open Staging Workflow (page 8-14)

Workflow and Registration

"Workflow" is the process whereby content is created and reviewed before the approved version is released to a specified audience. "Registration" is the process of registering a project with a content server to facilitate certain tasks.

Workflow

You can set up workflow on two different content servers, for two different purposes:

- On the source server, workflow known as "contributor criteria workflow" is set up to facilitate the review and approval of source documents for publication. This workflow focuses on content.
- On the staging server, workflow known as "staging criteria workflow" is set up to facilitate the review and approval of the output Web pages created from these source documents. This workflow focuses on the look and feel of the Web pages (content also may be addressed).

Registration

You register a project with a content server to facilitate certain tasks.

- You register a project on a source server in order to facilitate a "preview" of how a source document will look once translated and turned into a Web page (see Registering a Project to Preview a Source Document on page 8-76).
- You register a project on a staging server to enable staging workflow and to facilitate the creation of "problem reports" for the entire Web output created when your project is staged (see Registering a Project on a Staging Server on page 8-77).

Workflow and registration can be used in the publishing process as follows (the shaded areas represent tasks you perform in Site Builder).

	On the source server	On the staging server
Workflow	Use contributor criteria workflow for the review and approval of source documents	Use staging criteria workflow for the review and approval of output Web pages
Registration	Register a project to enable "previews" of source documents in HTML format	Register a project to enable staging workflow and to create a special version of the Content Information page that includes a "problem report"

Reviewing Open Staging Workflow

When you try to publish a project in Site Builder when there are still some open staging workflow (some documents in staging workflow have not been approved) and/or outstanding problem reports, the Publish Warning dialog box opens to alert you. You can click **Yes** to publish anyway, and might want to do so if you know that the workflow and problem reports are insignificant.

In most instances, you will want to review the workflow and problem reports.

To review the status of a open staging workflow

- 1. Click the appropriate **More Info** button in the Publish Warnings dialog box to open the Documents in Workflow dialog box.
- 2. This dialog box provides a complete summary of all Web pages in all open staging workflows for the project.
- 3. Right-click any entry to jump to the Workflow Step Information page, where you can view a complete status of the Web page in question, including its current step in the workflow process.

PUBLISHING A PROJECT

This section covers the following topics:

- Overriding Publish Warnings for Site Server (page 8-15)
- Publish Command (page 8-15)
- Publishing Notes (page 8-16)
- Publish Warnings (page 8-16)
- Publishing a Project (page 8-17)
- Publishing Options (page 8-18)
- Setting Publishing Options (page 8-19)
- Confirming Publishing Options (page 8-21)
- Overriding Staging and Publishing Options (page 8-21)

Overriding Publish Warnings for Site Server

When you create a project in Site Builder, the Publish Warnings dialog will open when you try to publish if there are staging criteria workflow open and/or problem reports outstanding. You can click **Yes** to publish anyway, and may want to do so because the workflow and problem reports are insignificant.

If you plan to schedule the project for publishing on Site Server and also want to ignore open workflow and outstanding problem reports, you must formally choose to do so before the scheduled project runs.

To override publish warnings in Site Server:

- 1. On the Publishing Options tab dialog of the Staging/Publishing Options dialog box, click the **Details** button to open that dialog box.
- 2. Select the **Ignore problem reports on staging documents** and **Ignore staging documents still in workflow** check boxes, as appropriate.
- 3. Click **OK** to return to the Staging/Publishing Options tab dialog.

You may also choose to publish with errors (see Publishing With Errors on page 8-11). This would allow you to complete the translation of a project on Site Server where, for example, a file in an unsupported format has inadvertently been added to a Directory Item in the project.

Publish Command

Publishing is the process whereby Site Builder copies translated output from the file system to a publishing server (the Web site).

You must set publishing options in order to publish your project. At a minimum, you must designate a publishing server and specify document information.

To publish a project, click **Publish** on the Run menu or **Publish** (

The Confirm Publishing Options dialog box opens, to ask you to confirm your options. To accept the information, click **OK**. Site Builder publishes the project. To change any information, click **Cancel** and return to the Staging/Publishing Options dialog box.

When you click **OK**, Site Builder copies all translated output from your file system to the publishing server.

If, when you click Publish, you haven't already specified the required information, the Staging/Publishing Options dialog box will open instead.

It's always wise to update (and re-translate) your project before you stage and publish it for the last time. See Updating source documents.

You shouldn't be updating between staging and publishing, because if something has changed, you probably want to translate your Web publication one more time and also stage it again before finally publishing.

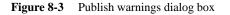
Publishing Notes

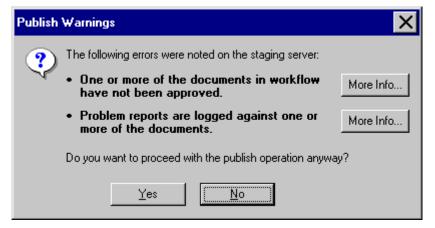
Publishing is the process whereby Site Builder copies translated output from the file system to a publishing server. See Publishing a Project (page 8-17) for more information. Here are some notes to consider when publishing.

- The expiration date on a staged or published file governs the expiration date of a Web page. That date is either the date inherited from the source document used to create the Web page (see Inheriting Document Information From Source on page 8-50) or the date used when you specified document information (see Setting Staging Options on page 8-4 and Setting Publishing Options on page 8-19).
- Check-in of a Web page on the staging or publishing server will fail if the expiration date is earlier than the release date. The release date is either the date inherited from the source document or the one applied when you specified document information.
- Site Builder stages and publishes incrementally. Say you have already staged or published and decide to update source documents and therefore the translated output. When you re-translate your project and then stage or publish again, Site Builder will copy only the revised output files to the location designated for staged or published output. It will preserve the original Content IDs in the process.
- The Update Versions, Translate, Stage, and Publish commands work differently when you schedule a publication for translation by Site Server. See Site Scheduler (page 8-38).

Publish Warnings

If when you finally try to publish a staged project and either staging workflow is not complete or at least one problem report is outstanding, the Publish Warnings dialog box will open.





Both bulleted items display if a staging criteria workflow is incomplete (one or more Web pages in a workflow has not been approved) and there is at least one outstanding problem report (one with a State other than Closed). If only one applies, only the appropriate bulleted item will appear in the dialog box.

You can click **Yes** to publish if you already know that the open workflow or outstanding problem reports are not significant.

Instead, you may want to Reviewing Open Staging Workflow (page 8-14) or Reviewing Outstanding Problem Reports (page 8-8).



Note: Because staging workflow and problem reports are independent of each other, there is not necessarily a relationship between open staging workflow and outstanding problem reports.

Publishing a Project

Publishing is the process whereby Site Builder copies translated output from the file system to a publishing server (your Web site).

Typically, you will have staged before you publish, in order to review your Web publication before going "live" to your Web site. Publishing isn't very different from staging. In fact, you could, if you like, "stage" directly to your Web site. As long as you suppress the Information icon on the output Web pages, you will end up with the same results as you would if you had published directly to your publishing server. However, you shouldn't "stage" to a publishing server if you have already staged to a staging server.

So setting publishing options is very similar to setting staging options. But remember: If you set both staging and publishing options, but only publish—don't first stage—your

project, then you may receive a warning in the log file: "The publish operation cannot obtain inherited values." This signifies that the most current metadata will not be inherited from the source and published to your site. Instead, Site Builder will inherit the metadata from your latest staged output, if available. (This applies only to users who have chosen to inherit property values and security settings from source documents.)



Note: Although you set staging and publishing options separately, you should generally set them the same way. The essential difference is that you cannot register the project on the publishing server or place the Information icon on output pages.

Publishing Options

You must set publishing options in order to publish your project. If you have already set staging options, these apply only to staged output. Once you have reviewed your staged Web publication and are ready to publish, you must set publishing options for your Web output.



Note: Although you set the options separately, you should generally set them the same way.

Tasks in Setting Publishing Options

You set publishing options by completing the following tasks. The first two, identifying the publishing server and specifying document information, are required:

- Identify the publishing server, that is, the content server you want to use to publish your translated output (required)
- Specify document information to be used, by default, for all output Web pages so that your output can be checked into the publishing server (required, even if you choose to inherit properties from source documents, to ensure that those pages that do not originate in the source server are assigned document information)
- Specify properties you want your body pages to inherit from their source documents instead of using the default document information (see Inheriting Document Information From Source on page 8-50). (This is optional.)



Note: The document information you specify is default information that will be used for all output pages, in particular, files for frames, TOCs, etc., that are built by Site Builder and do not have their origin in the source server. If you specify property values and security settings that you want your body pages to inherit from their source documents, the inherited values will prevail for all body pages.

Example

If the name of Author A is inherited from a source document and the name of Author B is specified for the output pages generated from that source document, only the name of Author A will be retained by Content Server.

- Generate document names from file names (optional) if you would like to publish to the content server without a unique suffix (see Publishing to the Content Server Without a Unique Suffix on page 8-81). When this option is selected, only the file name, with its prefixes (if added), is published to the content server. This is used most often when adding a prefix to output file names to help generate predictable file names (see Adding a Prefix to Output File Names on page 8-79).
- Set check-in file extensions if you would like to check in files with an extension other than the default hcsp extension when you publish to the content server (see Setting Check-In File Extensions on page 8-82). (This is optional.)

Setting Publishing Options

Publishing is the process whereby Site Builder copies translated output from the file system to a publishing server (the Web site).

You must set publishing options in order to publish your project. If you are publishing to Content Server, you must at least designate a publishing server and specify document information.



Note: Although you set staging and publishing options separately, you should generally set them the same way. The essential difference is that you cannot register the project on the publishing server or place the Information icon on output pages. If you are going to stage your project, see Setting Staging Options on page 8-4.

- 1. With your translated project open in Site Builder, click **Publishing Options** on the Run menu to open the Staging/Publishing Options dialog box.
- 2. From the Repository drop-down list, select the type of location you want to stage to: Content Server, file system, FTP site, or HTTP site.
- 3. Click the **Browse** button opposite Pages.
- 4. If you are publishing to Content Server, the Publishing Options dialog box will open. If you have configured more than one content server, click the **Content Server** button to open the **Choose a Content Server** dialog box, and select the content server you want to publish to. (If you have only one content server configured, it will already be selected.) Then see below for specifying document information.

- 5. If you are publishing to the file system, the Select Publish Directory dialog box will open. Locate the directory you want to publish to, click **Open**, and then click **OK**.
- 6. If you are publishing to an FTP or HTTP site, the Publish Destination dialog box will open. Complete the required information in the dialog box and click OK. (See Specifying Staging and Publishing Options for an FTP Site on page 8-61 and Specifying Staging and Publishing Options for an HTTP Site on page 8-65.) With your translated project open in Site Builder, click Publishing Options on the Run menu to open the Staging/Publishing Options dialog box.

If you are publishing to Content Server, the same content server is now designated for all three types of output: pages, graphics, and Gallery graphics. You can use different content servers for the other two, if you want, though this is unlikely to be useful.

Follow these steps to specify document information:

Part of your publication will consist of files for frames, reference pages, etc., that are generated by Site Builder during translation. Since these output pages can't inherit from source documents, you must specify document information so that these files can be checked into the content server that is used for publishing.

This document information will be used, by default, for body pages, too, unless you designate property values and security settings to be inherited from the source documents.

- 1. Click the **Document Information** button to open that dialog box.
- 2. Change or complete the other fields to set the document information you want to associate with the published output. This can include custom document information specific to an organization.
- 3. Click the Assign Info button to return to the Publishing Options dialog box.
- 4. Click **OK** to return to the Staging/Publishing Options dialog box.
- 5. Click **Details** to open that dialog box. If you are planning to schedule the project on Site Server and want the server to ignore outstanding problem reports and staging documents still in workflow, select both check boxes.
- 6. Click **OK** to return to the Staging/Publishing Options dialog box.

You should not update between staging and publishing, because if something has changed, you probably want to translate your Web publication one more time and also stage it again before finally publishing.

See Publishing Options (page 8-18) for additional tasks you might want to perform in the Publishing Options dialog box, such as registering the project to facilitate workflow.

Confirming Publishing Options

Each time you Publish a project, the Confirm Publishing Options dialog box opens, assuming you have set staging or publishing options:

- To accept the information, click OK and Site Builder publishes to the repository. That is, it copies the translated output from the file system to Content Server, as specified in Publishing Options.
- To change the information, click Cancel, and then return to the Publishing Options dialog box to specify different options.

If you click Publish before specifying the locations, the Staging/Publishing Options dialog box opens so you can provide the required information.

Each time you use the Publish command, Site Builder performs an incremental publish. It first creates new output files for any new source documents added to the project since the last time you published. It then replaces, as necessary, previously published files that have been updated since the last time you published. Finally, it deletes previously published files for those source documents that are no longer part of the project.

Overriding Staging and Publishing Options

When you complete staging or publishing options for a project, you are treating all of your publication the same way for the output location selected. That is, the same property values and security settings (whether specified or inherited) will be applied to all output pages and graphics for a given output location.

If you prefer, you can fine-tune your Web publication by specifying different property values and security settings for individual subpublications or documents in your project. This is only possible after you have completed staging or publishing options.

 Right-click a subpublication in the Publication Hierarchy pane or a source document in the Contents pane and choose **Properties** from the popup menu. The Publication or Document Properties dialog box opens.

The dialog box now has a Publish Options tab, which displays only if you have already specified output locations (in the Staging Options or Publishing Options dialog box).

2. Click **Publishing Options** to open that tab dialog.

You have two sets of options: pages and graphics. Within each, you have the opportunity to edit property values and security settings that will override those set for

the publication as a whole in Staging or Publishing Options. (In each case, the Clear button will simply clear whatever property values or security settings have been entered. In that event, the values and settings will revert to whatever is set at the next highest level in the hierarchy.)

The <No Overrides> entries signify that no property values or security settings have been specified for this subpublication or source document (those set in Staging or Publishing Options for the Web publication are to be used).

3. Under Pages, click the **Edit** button opposite Properties to open the Publishing Options dialog box.

This is the same dialog box you saw when you first set staging options (except that you cannot change the content server and the option to register the project is not available).

Now you can set property values and security settings for the selected subpublication or document that will override those values set for publication as a whole.

Publish options set for a subpublication or source document override options set at a higher level in the hierarchy. Typically, this means they override options set in the Staging or Publishing Options dialog box for the publication as a whole. You could set options for a subpublication that are different from the project options, and then set options differently for a source document within that subpublication.

Although the Publish Options tab is available for the root publication (as well as all subpublications and source documents), you should ignore it (except for linked publications). You must always use the Publish Options dialog box to set publish options for the publication as a whole.

Gallery graphics are dealt with only at the project level.

SCHEDULING A PROJECT FOR PUBLISHING

This section covers the following topics:

- Enabling DCOM (page 8-23)
- Site Server Topics (page 8-24)
- Scheduling a Task (page 8-37)

Enabling DCOM

When connecting Site Scheduler to Site Server, you may need to run DCOM Configuration in order to enable DCOM, and also to set access and launch permissions for each user so that you can control the list of users who will be allowed to launch the server.

To ensure that remote DCOM is installed and enabled on both the Site Scheduler and Site Server machines, you need to run DCOM Configuration on each machine to check the settings.

On Windows XP

- 1. From the Start menu, click Settings, and then Control Panel.
- 2. Switch to the **Classic View**, if necessary. Double-click **Administrative Tools**, and then double-click **Component Services**.
- 3. In the **Computers** folder of the console tree of the **Component Services** administrative tool, right-click the computer for which you want to disable or enable DCOM, and then click **Properties**.
- 4. Click the **Default Properties** tab. Select the **Enable Distributed COM on this Computer** check box.
- 5. Click **OK** to close the dialog box.
- On Windows 2000
- 1. From the Start menu, click **Run**. In the Open text box type **dcomcnfg**, and click **Yes** to open the Distributed COM Configuration Properties dialog box.

If you previously installed Site Builder on the machine, a DCOM Configuration Warning dialog box may appear. Click **Yes** to record the Registry entries mentioned in the Warning.

- In the Distributed COM Configuration Properties dialog box, click Default Properties to open that tab dialog. Select the Enable Distributed COM on this computer check box.
- 3. Click **OK** to close the dialog box.

Site Server Topics

This section covers the following topics:

- Site Server (page 8-24)
- Automated Publishing in Site Server (page 8-25)
- Changing the Server Setup (page 8-26)
- Automatically Running Pre-7.2 Projects in Site Server (page 8-26)
- Registering a Username and Password for Site Server (page 8-27)
- Running Site Server (page 8-28)
- Scheduling Projects From Previous Versions on Site Server (page 8-29)
- Setting Up Site Server as a Service (page 8-29)
- Starting and Stopping Site Server (page 8-31)
- Connecting to Site Server (page 8-32)
- Disconnecting from Site Server (page 8-33)
- Pause Publishing in Site Server (page 8-33)
- Running Multiple Projects in Site Server (page 8-34)
- Sending an E-Mail Notification for a Task (page 8-35)

Site Server

The installation and setup of Site Server is discussed in the Installation & Configuration Guide (see Installation & Configuration Guide.pdf in the Documentation folder of your installed directory and also the Content Publisher product disc).

Here are some important points to note:

- Once you connect to Site Server, Site Server continues to run in the background, even if you exit Site Scheduler, as long as the Site Server host computer is still running.
- When running Site Server on Windows 2000 as an OLE Automation server, the Site Server icon () displays at the bottom right of your screen, on the Windows taskbar. You can exit Site Server at any time by right-clicking this icon and choosing Stop Site Server from the popup menu.
- If you right-click the logo and choose Properties, you will open the Site Server Properties dialog box. On the Options tab dialog you can set logging information for

the Site Server log file. This log file is different from the ones you create in Site Scheduler. (See Setting Up the Server Log File on Site Server (page A-8) for more information.)

- When running Site Server as a Service, you start and stop Site Server from the Control Panel (the Services window in Windows 2000). Double-click the Site Server icon in the Control Panel to open the Site Server Properties dialog box. Then click the Start or Stop button on the Control tab.
- To set logging information for Site Server as a Service, open the Windows Control Panel and double-click the Site Server icon to open the Site Server Properties dialog box, and then open the Options tab dialog.

Automated Publishing in Site Server

Site Builder can be used to create projects and publications, add source documents, manage templates, and ultimately publish the Web publication to a repository.

Site Server extends the power of Site Builder by automating the publishing process below:

- update source documents at run-time (Update Versions command),
- translate source documents (Translate command)
- copy the translated output to the staging server (Stage command)
- copy the translated output to the publishing server (Publish command)

You don't, in fact, select Update Versions in Site Scheduler, because the project is automatically updated when it runs in Site Server. Typically, you will schedule a project to Translate or to Translate and Stage.

You would schedule a separate task to Publish the project. If you have full confidence in your Web output, you may choose to bypass staging altogether, in which case you would use the Translate–Publish sequence. (Of course, staging and publishing options must be set before you can stage or publish a project.)

If you're still in the process of creating a project, and it isn't ready to be staged or published yet, you may prefer to simply update and translate.

Changing the Server Setup

When you install Site Server, you are given the option to run the server as an OLE Automation server or as a Service. You can change the server setup after installation, if you want. You do this by typing the appropriate command line on the path (otherwise, the full path is required).

- To register Site Server as a Service: TCServer -Service
- To register Site Server as an OLE Automation server set up to run as a remote server: TCServer -Automation
- To unregister Site Server at any time: TCServer -Unregister

If you decide to register Site Server as a Service, you must then set up the user account. See Setting Up Site Server as a Service (page 8-29).

Automatically Running Pre-7.2 Projects in Site Server

Like Site Builder, Site Server will automatically translate 7.2, 7.5, and 7.6 projects; however, it will not automatically translate pre-7.2 projects. If you plan to schedule pre-7.2 projects for translation on Site Server, you have two options:

- Open the pre-7.2 project files in Site Builder and save them to the 10gR3 format and then schedule them for translation by Site Server.
- Change a setting in the Site Server Properties dialog box so that the server will automatically convert all scheduled pre-7.2 projects to the 10gR3 format before translating them. Since Site Server simply converts an existing file to the 10gR3 format (and does not preserve a copy of the pre-7.2 version), this switch is off by default.

Follow these steps to automatically schedule pre-7.2 projects in Site Server:

1. Open the Properties dialog box for Site Server.

Depending on your setup, you can open the dialog box either from the Control Panel or by right-clicking the Site Server icon on the taskbar (with Site Server running) and choosing Properties.

2. On the Options tab dialog, select the **Update old project files to the current format** check box.

Project files in the pre-7.2 format will be automatically updated by Site Server to the 10gR3 format and will be translated at the scheduled time. A copy of the old pre-7.2 project file will not be retained.

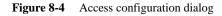
Registering a Username and Password for Site Server

Each machine on which Site Server is installed requires a username and password in order for Site Server to access Content Server. System administrators can use password encryption to configure the machines on which Site Server is installed, using the utility PswdCfg.exe, which is available in the Support folder of the Content Publisher product disc.

Typically, the system administrator will want to encrypt passwords during the setup of Site Server. In that event, before running the utility the system administrator should first register the names of all content servers that Site Server will require access to. You can register only one content server during installation. However, you can register additional content servers after installation. (See Registering a Content Server by Running the Mini-Installer on page 8-74.)

Follow these steps to encrypt a password:

1. Double-click **PswdCfg.exe** in the \Resources\en folder of your Content Publisher installation directory to run the encryption utility. The Access Configuration dialog box opens.



🛗 Stellent Access	Configuration	×
Available Content S	ervers:	
dpetersonpc		
Master_on_xcsqa		
	1 2 1	
-Authentication Cre	edentials	
U <u>s</u> er Name:	landerse	
Password:	*****	
Confirm Password		
	· J	
		_
	<u>U</u> pdate	

- 2. Select the name of the first content server you want to configure.
- 3. Under Authentication Credentials, provide the user name and password (twice), as required.
- 4. Click **Update**. The following dialog box will appear, to confirm that the username and encrypted password have been successfully registered.

Figure 8-5 Access dialog box

Stellent A	Access Configuration
٩	The authentication credentials were successfully entered into the registry.
	OK

- 5. Select each additional content server, in turn, that you want to configure, and repeat steps 3 and 4.
- 6. When you have configured all the content servers necessary for the machine on which Site Builder is installed, click the Close button to the right of the title bar.
- 7. Follow the above steps to configure additional machines on which Site Server is installed.

You can run PswdCfg.exe at any time to configure additional content servers you may register later.

You can run PswdCfg.exe at any time to change an encrypted password. If for some reason you no longer want a password to be encrypted, you will have to remove the registry entry manually from the Registry and create a new entry.

Running Site Server

You can install Site Server on a Windows 2000 or XP machine, either as

- ✤ an OLE Automation server, or
- ✤ a Service

No additional configuration is necessary with the OLE Automation option. The Service option, which affords the most flexible setup, requires additional configuration after installation. See Setting Up Site Server as a Service (page 8-29).

Whichever option you choose during installation, you can easily switch later to the other option by using a command line in DOS. See Changing the Server Setup (page 8-26).

Whichever option you choose, you still need to register the username and password of someone who has access to Content Server. See Registering a Username and Password for Site Server (page 8-27).

If you choose Service, you still have to ensure that Site Builder can connect to Site Server. You use Site Scheduler, a utility installed with Site Builder, to do this. Connecting to Site Server isn't a problem if you install Site Builder and Site Server on the same machine. But you are most likely to install Site Server on a dedicated server. See Connecting to Site Server (page 8-32).

Scheduling Projects From Previous Versions on Site Server

Site Server 10gR3 will automatically translate 7.2, 7.5, and 7.6 project files.

However, Site Server will not translate pre-7.2 projects. If you plan to schedule pre-7.2 projects for translation on Site Server, you can

- Open the pre-7.2 project files in Site Builder and save them in the 10gR3 format, and then schedule them for translation by Site Server, or
- Change a setting in the Site Server Properties dialog box so that the server will automatically convert all scheduled pre-7.2 projects to the 10gR3 format before translating them. Since Site Server simply converts the existing file to the 10gR3 format (and does not preserve a copy of the pre-7.2 version), this switch is off by default. See Automatically Running Pre-7.2 Projects in Site Server (page 8-26).

Setting Up Site Server as a Service

To run Site Server as a Service, you must create a user account for a user with full network access, such as the network domain administrator. Once the user account is set up, Site Server will be able to handle the translation of any project scheduled for translation from any workstation in the network.

When you set up a user account, you can accept the default system account or specify your own account and password. The preferred option is to specify your own user account and password so that you can specify the account's network access privileges and rights. You can thus ensure that Site Scheduler and Site Server work together successfully and that Site Server can access all the files it needs to at any time in order to process the tasks scheduled.

Follow these steps to specify a user account and password in Windows 2000:

- 1. On the **Start** menu, click **Settings**, **Control Panel**, **Administrative Tools**, and then **Services**.
- 2. In the Services dialog box, right-click **Site Server**, and then click **Properties** on the popup menu to open the Site Server Properties dialog box.
- 3. On the General tab dialog, select Automatic from the Startup Type drop-down list.
- 4. Click **Log On** to switch to that tab dialog.
- 5. Under Log On As, select **This Account**, and then specify the account that you want to use.
- 6. Enter a password, and then confirm it.
- 7. Click **OK** to return to the Services dialog box. The Startup Type column opposite Transit Central Server now reads Automatic.
- 8. Right-click the Site Server entry and click **Start** on the popup menu.

To specify a user account and password in Windows XP:

- 1. On the Windows Start menu, click Settings and then Control Panel.
- 2. Click Switch to Category View.
- 3. Click **Performance and Maintenance**, and then double-click **Administrative Tools**, and double-click the **Services** icon.
- 4. In the Services dialog box, right-click **Site Server**, and then click **Properties** on the popup menu to open the Site Server Properties dialog box.
- 5. On the General tab dialog, from the Startup Type drop-down list, select Automatic.
- 6. Click **Log On** to open that tab dialog.
- 7. Under Log On As, select This Account and specify the account you want to use. The account must be set up for a user who has complete access to the network. Only in this way will Transit Central Server have complete access to all files specified by any task you run. (The default option, System Account, will not provide complete network access.) If necessary, click the button to the right of the text box to open the Add User dialog box and select the user that way.
- 8. Enter a password, and then confirm it.
- 9. Click **OK** to return to the Services dialog box. The Startup column opposite Server now reads Automatic.
- 10. Click **Start the service** at the top left of the screen.

11. Right-click the Transit Central Server entry and click **Start** on the popup menu.

Site Server is now set up as a Service and is running on the server machine. Once users are successfully connected to Site Server via Site Scheduler (see Connecting to Site Server on page 8-32), they can access Site Server at any time by running Site Scheduler from their workstations. Site Server, in turn, will automatically check every five seconds for jobs scheduled by Site Scheduler.

Because Site Server can check the task list only when it is running, it is important that, if your users are scheduling overnight translations, the machine on which Site Server is installed should be left running. That's why it's important to set Site Server to an automatic startup when you configure it in the Services applet of the Control Panel.

User accounts should not be confused with user logins. Services on Windows 2000 and Windows XP can run without any user logged into the machine.

Starting and Stopping Site Server

You can start and stop Site Server at any time.

Follow these steps to start and stop Site Server on Windows 2000:

- 1. Double-click Site Server in the Services window to open the Site Server dialog box.
- 2. On the General tab dialog, click the **Start** or **Stop** button, as appropriate.

To start and stop Site Server on Windows XP:

- 1. In the Control Panel, click Switch to Classic View.
- 2. Double-click the **Site Server** icon to open the Site Server dialog box.
- 3. On the Control tab dialog, click the **Start** or **Stop** button, as appropriate.

If you are running the Server remotely, you must close it on the machine on which it is running.

Follow these steps to start Site Server from a workstation:

If Site Server is installed locally, you can start it in different ways:

- From the Start menu, click Programs, click Content Publisher (or the name of the program group you chose during installation), and then click Site Server, or
- In the Content Publisher directory in Windows Explorer, double-click TCServer.exe, or

 From the Start menu, choose Run, and in the Open text box type the path file name for TCServer.exe (for example, "C:\Program Files\Stellent Content Publisher\ TCServer.exe,"), or

Follow these steps to connect to Site Server:

Site Server can be running without Site Builder being connected to it. Once you connect Site Builder to the server locally, the server automatically starts. However, if Site Server is installed to run remotely, it must already be running for a remote client to successfully connect to it.

You will need to know the name of the server machine to make this connection. See the instructions above for starting the server from the server machine.

 To connect Site Builder to Site Server, start Site Scheduler in Site Builder by clicking Site Scheduler (
) on the standard toolbar or choosing Site Scheduler from the Server menu.

If during a previous session you successfully connected to Site Server from Site Scheduler, Site Server will start automatically.

2. If you need to establish a connection, open the Connect to Server dialog box from the Server menu. See Connecting to Site Server (page 8-32) for more information.

If you try to stop Site Server when it is running a task, it won't stop until it has completed that task.

You can also use the Pause Publishing command to temporarily halt translations by Site Server. Site Server continues to run and accept projects for translation, but it won't translate these projects until you "continue publishing." See Pause Publishing in Site Server (page 8-33).

Connecting to Site Server

Before you can use Site Scheduler to schedule the translation of projects created in Site Builder, you must connect your workstation to Site Server -- that is, to the machine on which Site Server is running. You do this from Site Scheduler. (See Starting Site Scheduler on page 8-39.)

- 1. In the Site Scheduler window, click **Connect** (<u>1</u>) on the toolbar or choose **Connect** from the Server menu to open the Connect to Server dialog box.
- 2. In the Server text box, enter the name of the machine you want to connect to, that is, the name of the machine on which Site Server runs.

If you are running Site Server on your local machine and are not sure of its name, right-click Network Neighborhood in Windows Explorer, and choose **Properties** from the popup menu. In the Network dialog box, click **Identification** to open that tab dialog. The name of your machine is displayed in the Computer Name text box.

If you are running Site Server on a remote machine, click **Browse** in the Connect to Server dialog box to open the Browse for Computer dialog box, which displays the Network Neighborhood. You should see the name of the machine there. Select the machine from the list, or contact your network administrator to find out which machine on the network is running Site Scheduler.

3. Click **OK**. The title bar of Site Scheduler displays the name of the machine you are now connected to.

Once you have established a connection to a particular server, Site Scheduler will reconnect to that server each time you open Site Scheduler in the future. If you close Site Scheduler, Site Server will continue to run as long as the computer it is installed on is still running.

You may need to run DCOM Configuration in order to enable DCOM (see Enabling DCOM on page 8-23), and also to set access and launch permissions for each user, so that you can control the list of users who will be allowed to launch the server.

Disconnecting from Site Server

You can disconnect from Site Server at any time, by doing one of the following, in Site Scheduler:

- Click Disconnect () on the toolbar, or
- Choose **Disconnect** from the Server menu.

If you close Site Scheduler, Site Server will continue to run as long as the computer it is installed on is still running.

Pause Publishing in Site Server

You can use the Pause Publishing command to temporarily halt all translations scheduled for Site Server. Site Server will continue to accept the scheduling of projects from workstations, but it won't translate those tasks until you choose the Continue command.

Follow these steps to pause publishing on Site Server:

 Right-click the Site Server icon () on the Windows taskbar to display the Site Server popup menu.

2. Click Pause Publishing.

The popup menu closes. You have now instructed Site Server to "pause" all scheduled tasks. To continue publishing again, repeat the above steps, this time clicking **Continue** on the popup menu.

Follow these steps to pause publishing when running the server as a service:

- 1. Click Settings on the Start menu, and then choose Control Panel from the submenu.
- 2. In the Explorer window that opens, double-click the **Site Server** icon to open the Content Publisher Properties dialog box.
- 3. Click Control to open that tab dialog.
- 4. Click Pause Publishing, and then click OK.

When you are ready to continue publishing again, repeat these steps, this time clicking **Continue** in the Control tab dialog.

Running Multiple Projects in Site Server

You can run multiple tasks at the same time in Site Server to increase the amount of work (throughput) that your system completes.

Although you benefit most from running tasks simultaneously if you use a multiprocessor machine, you can still use this option to increase your efficiency if you use a uniprocessor machine.

Many different factors affect the throughput of Site Server, including memory availability, machine CPU loads, disk speeds, and network bandwidth. As such, the "server threads" setting recommendations in step 2 should be taken as general guidelines that may vary depending upon your setup and current situation.

- 1. To open the Site Server Options dialog, do one of the following, depending on your setup:
 - From the Start menu in Windows, choose Settings, and then Control Panel. In the Control Panel window, double-click the Site Server icon, or
 - Right-click the Site Server icon on the Windows taskbar, and choose Properties from the popup menu.
- 2. Under Server threads, enter one of the following:
 - If you are using a multiprocessor machine, enter the number of server threads that you want Site Server to use. For most configurations, this value should not exceed the number of available processors. View the number you enter as a starting

number. Given variations in CPU loads, disk speeds, etc., you may find that greater throughput is achieved with another number.

- If you are using a uniprocessor machine, enter 2. Entering a number greater than 2 will not improve throughout noticeably (and may even degrade performance).
 Enter 1 if simultaneous translations are not required and also if you want backward compatibility with prior versions of Content Publisher.
- 3. Click OK.

If you attempt to run two tasks that specify the same project at the same time, the tasks run one at a time regardless of the Server thread setting. This occurs because the project can only be opened by one process at a time.

Sending an E-Mail Notification for a Task

Each time a scheduled task runs on Site Server, an email can be automatically generated to confirm how successfully the task has been translated, staged, or published. You can also attach the translation log file to provide information on how the task ran.

E-mail can be sent to anyone within the organization, but you will likely want the Webmaster to be alerted on the outcome of translation, staging, and publishing.

Configure Site Server to Send E-Mail Notification

- 1. From the Windows Control Panel, double-click the **Site Server** icon to open the Site Server dialog box.
- 2. Click **Notifications** to open that tab dialog. The information that displays may have been set during installation, but you can change it at any time.
- 3. Under Mail Server Configuration, enter the address of your mail server in the **Mail Server** text box, such as **mail.company.com**.
- 4. Under **SMPT Port**, accept the default of 25, or, if necessary, enter a different port number.
- 5. In the Notification sender email address text box, enter the email address that represents the message sender. This may be a general mailbox, such as info@company.com. The email address entered here will be listed as the sender each time Site Server generates a notification email message.
- 6. In the **System administrator email address** text box, enter the email address of the system administrator if you want to send an email to this address every time certain server errors occur. This may be a general mailbox, such as **sysadmin@company.com**, or any valid email address in the organization. This

information is optional. If you leave this text box blank, no server-error related email is generated.

7. Click OK.

An email notification on server errors contains information similar to that found in the server log.

Even if you don't want Site Server to generate email notification on server errors, you must enter information in the **Mail Server Configuration** and **Notification Sender Email Address** text boxes, since this information determines the mail server and sender address that Site Server uses when sending all email notifications.

To send an email notification for a particular task, you must set options for that task in the New Task or Edit Task dialog box of Site Server.

Set Up an E-Mail Notification for a Task

- 1. In the Site Scheduler main window, click **New** on the Task menu to open the New Task dialog box, or select an existing task and click **Edit** on the Task menu to open the task dialog box.
- 2. Under Notification, in the **Email address** text box, enter the email address of the person who will be notified of the publication status, such as **webmaster@company.com**. You can enter only one address in this field.
- 3. Under Notification, from the **Notification level** drop-down list, select the level of notification you want to use for the task being scheduled.

Level	Description
0 - No notification	No email is generated.
1 - Notify on errors	Notification of errors that occur during translation, staging and publishing.

Level	Description
2 - Success with output	Notification of errors that occur when output is generated during translation, staging and publishing, and
	Notification when output is generated and translation, staging and publishing succeed.
	When you select this level you will receive an email only when output is generated as a result of a task being run.
3 - Always	Notification of all errors and successes that occur during translation, staging and publishing.

The information contained in the email is a summary of the translation log file.

- 4. If you want to attach a log file, select **Attach Log File to Notification**. To attach a log file to an email, you must also specify a log file and set the logging level under Logging.
- 5. Click OK.

To send an email notification for a task, you must also configure Site Server to include mail server, port, and sender information (see Configure Site Server to Send E-Mail Notification on page 8-35).

You can include the same project in more than one task (but only one project in each task.) For example, you may want to set up email notification for a task that directs Site Server to translate and stage a project when it is run, and set notification for a different task that is set to publish the project at a later date.

Scheduling a Task

This section covers the following topics:

- Site Scheduler (page 8-38)
- Starting Site Scheduler (page 8-39)
- ♦ Adding or Editing a Project (page 8-39)
- ✤ Adding a Project to the Task List (page 8-39)
- Editing a Project on the Task List (page 8-40)

- Exiting Site Scheduler (page 8-40)
- Managing the Task List (page 8-40)
- Reconnecting to a Server (page 8-41)
- Removing a Project From the Task List (page 8-41)
- Reviewing Task Information (page 8-41)
- Scheduling a Task (page 8-42)
- Sending an e-Mail Notification for a Task (page 8-42)
- Suspending an Individual Task (page 8-44)
- Specifying a Task (page 8-45)
- Site Scheduler Help (page 8-46)
- Testing a Scheduled Project (page 8-47)
- Translation Status (page 8-48)
- UNC Paths (page 8-48)

Site Scheduler

Site Scheduler is the scheduling component for Site Server. Once you complete projects in Site Builder, you can use Site Scheduler to schedule those projects for translation on your server at any time.

Site Scheduler is installed with both Site Builder and Site Server (where the latter is installed on a dedicated server machine). So you can start Site Scheduler from within Site Builder or separately, by itself (see Starting Site Scheduler on page 8-39).

To use Site Scheduler, you must:

- Connect your workstation to Site Server (see Connecting to Site Server on page 8-32)
- Add your projects to the task list for the Server you are connected to (see Adding a Project to the Task List on page 8-39)
- Specify and schedule each task when you add the project to the task list (see Specifying a Task on page 8-45 and Scheduling a Task on page 8-42)

Starting Site Scheduler

You can start Site Scheduler from within Site Builder at any time. You can also start Site Scheduler separately, by itself, without Site Builder running.

To start Site Scheduler by itself

- From the Start menu in Windows, choose Programs, and from the Content Publisher program group, choose Site Scheduler, or
- Double-click TCScheduler.exe in the installed directory for Site Builder or Site Server

Adding or Editing a Project

To add a new project to the task list, you use the New Task dialog box. To edit an existing project on the task list, you use the Edit Task dialog box. (The two dialog boxes are the same; only the title bar changes, depending on which one you open.)

- To add a project to the task list, click New Task () on the toolbar or choose New from the Task menu.
- To edit an existing project, select the project in the task list and click Edit Task () on the toolbar or choose Edit from the Task menu.

The New Task or Edit Task dialog box will open accordingly. Click Related topics for topics that provide more information on projects and the task list.

Adding a Project to the Task List

Once you complete projects in Site Builder, you can translate them right away. Alternatively, you can use Site Scheduler to schedule their translation on Site Server.

You do this by adding a project to the task list for a specific server and then specifying and scheduling the task to run.



Note: You must be connected to the machine running Site Server in order to schedule projects for translation.

Follow these steps to add a project to the task list:

1. In Site Scheduler, click **New Task** (<u>)</u>) on the toolbar or choose **New** from the Task menu to open the New Task dialog box.

- 2. To select the project file and specify the task, see Specifying a Task (page 8-45).
- 3. To schedule the task, see Scheduling a Task (page 8-42).
- 4. Click OK.

Editing a Project on the Task List

Once you schedule a project in Site Scheduler, you may want to change the original specifications and schedule. You can edit any task you added to the task list at any time.

Follow these steps to edit a project to the task list:

- 1. In the Site Scheduler window, select the project you want to edit from the task list.
- 2. Click **Edit Task** (**b**) on the toolbar or choose **Edit** from the Task menu to open the Edit Task dialog box.
- On the Specifications and Schedule tab dialogs, edit the information for the selected project.
- 4. Click **OK** to return to the Site Scheduler window.

A Webmaster will need superuser privileges in order to edit the tasks of others. See Managing the Task List (page 8-40).

Exiting Site Scheduler

You can exit Site Scheduler at any time. Do one of the following:

- From the Server menu, choose Exit.
- ✤ Use the keyboard shortcut Alt, S, X.
- ✤ Use the keyboard shortcut Alt+F4.
- Click the **Close** button on the title bar.
- Click the Site Scheduler logo on the title bar and choose **Close** from the System menu.

After you exit Site Scheduler, Site Server will continue to run on the machine it is installed on.

Managing the Task List

Individual users at workstations throughout the organization can add projects to the task list, but they can only edit their own tasks. A Webmaster who wants to be able to edit all the tasks on the list must be set up as a superuser. To accomplish this, the Webmaster must create a new DWORD value for the following Key in the Registry on the server machine:

HKEY_CURRENT_USER\Software\Stellent\Content Publisher\Scheduler\6.0\Settings

The Value Name of the DWORD is "superuser" and its Value Data is 1.

As a superuser, the Webmaster can edit all tasks on the task list for a given server, but not change their ownership.

Reconnecting to a Server

From the Server menu in Site Scheduler, choose the name of the server you want to reconnect to. The File menu lists the servers (up to six) that you used most recently. Or click **Connect** (]) on the toolbar or choose **Connect** from the Server menu.

Removing a Project From the Task List

Once you schedule a project in Site Scheduler, you may want to remove that project later.

- 1. With Site Builder running, click **Scheduler** ($\overline{\mathbf{a}}$) on the toolbar.
- 2. In the Site Scheduler window, select the project in the task list that you want to remove.
- 3. Click **Delete Task** (\checkmark) on the toolbar or choose **Delete** from the Task menu, or select the task and press the Delete key.

Reviewing Task Information

You can obtain preliminary information on how any task has run by opening the Task Info dialog box in Site Scheduler.

You can also send an email notification for a task to direct Site Server to automatically generate email that confirms how successfully a task has been translated, staged, or published (see Sending an E-Mail Notification for a Task on page 8-35). The email can include the translation log file, if you wish.

To review task information, right-click the task on the task list and choose **Info** from the popup menu. The Task Info dialog box opens, to provide a preliminary account of how the task last run.

You should always check the log file in the event that a task fails to run successfully or has run successfully, but with warnings or errors.

Scheduling a Task

Adding a project to the task list in Site Scheduler requires that you first select the project and specify the task (see Specifying a Task on page 8-45) and also set the actual schedule for when the task is to run (see below).

- 1. In the New Task dialog box, click the Schedule tab to open that tab dialog.
- 2. Schedule a time for your project to run.

Note that the times for scheduling are set up in increments of a minute. If you select Every, the default setting of 1:00 represents one hour. With this option you should also specify the time period during which the task should be run.

- 3. If you want to translate the project over only a limited period of time, click **Expires on** under Keep Running Until and use the Up/Down control to select a date from the box.
- 4. Click **OK** to return to Site Scheduler main window, where the new task is now listed in the task list.
- 5. To schedule other projects for translation, repeat the above steps and also the required specification steps. When your task list is complete, click the **Close** box on the title bar or choose **Exit** from the File menu.

If you prefer, you can quickly test a scheduled project to see that it will run smoothly without warnings and errors at the scheduled time. (See Testing a Scheduled Project on page 8-47.)

Sending an e-Mail Notification for a Task

Each time a scheduled task runs on Site Server, an email can be automatically generated to confirm how successfully the task has been translated, staged, or published. You can also attach the translation log file to provide information on how the task ran.

Email can be sent to anyone within the organization, but you will likely want the Webmaster to be alerted on the outcome of translation, staging, and publishing.

Configure Site Server to Send E-Mail Notification

- 1. From the Windows Control Panel, double-click the **Site Server** icon to open the Site Server dialog box.
- 2. Click **Notifications** to open that tab dialog. The information that displays may have been set during installation, but you can change it at any time.

- 3. Under Mail Server Configuration, enter the address of your mail server in the **Mail Server** text box, such as **mail.company.com**.
- 4. Under **SMPT Port**, accept the default of 25, or, if necessary, enter a different port number.
- 5. In the Notification sender email address text box, enter the email address that represents the message sender. This may be a general mailbox, such as info@company.com. The email address entered here will be listed as the sender each time Site Server generates a notification email message.
- 6. In the System administrator email address text box, enter the email address of the system administrator if you want to send an email to this address every time certain server errors occur. This may be a general mailbox, such as sysadmin@company.com, or any valid email address in the organization. This information is optional. If you leave this text box blank, no server-error related email is generated.
- 7. Click OK.

An email notification on server errors contains information similar to that found in the server log.

Even if you don't want Site Server to generate email notification on server errors, you must enter information in the **Mail Server Configuration** and **Notification Sender Email Address** text boxes, since this information determines the mail server and sender address that Site Server uses when sending all email notifications.

To send an email notification for a particular task, you must set options for that task in the New Task or Edit Task dialog box of Site Server (see below).

Set up an E-Mail Notification for a Task

- 1. In the Site Scheduler main window, click **New** on the Task menu to open the New Task dialog box, or select an existing task and click **Edit** on the Task menu to open the task dialog box.
- Under Notification, in the Email address text box, enter the email address of the person who will be notified of the publication status, such as webmaster@company.com. You can enter only one address in this field.
- 3. Under Notification, from the **Notification level** drop-down list, select the level of notification you want to use for the task being scheduled.

Level	Description
0 - No notification	No email is generated.
1 - Notify on errors	Notification of errors that occur during translation, staging and publishing.
2 - Success with output	Notification of errors that occur when output is generated during translation, staging and publishing, and
	Notification when output is generated and translation, staging and publishing succeed.
	When you select this level you will receive an email only when output is generated as a result of a task being run.
3 - Always	Notification of all errors and successes that occur during translation, staging and publishing.

The information contained in the email is a summary of the translation log file.

- 4. If you want to attach a log file, select **Attach Log File to Notification**. To attach a log file to an email, you must also specify a log file and set the logging level under Logging.
- 5. Click OK.

To send an email notification for a task, you must also configure Site Server to include mail server, port, and sender information (see Configure Site Server to Send E-Mail Notification on page 8-42).

You can include the same project in more than one task (but only one project in each task.) For example, you may want to set up email notification for a task that directs Site Server to translate and stage a project when it is run, and set notification for a different task that is set to publish the project at a later date.

Suspending an Individual Task

On occasion, you may decide to temporarily suspend the translation of a particular project, one that is scheduled for translation at a regular time each day. Without affecting any of the schedule settings, you can temporarily stop the project from being translated.

Follow these steps to suspend an individual task:

- 1. Select the project in Site Scheduler, and choose **Edit** from the Task menu to open the Edit Task dialog box.
- Click Schedule to open that tab dialog, and under Keep Running Until, click the Down control for the list box in order to change the Expires On date to yesterday's date.
- 3. Click **OK** to return to the Site Scheduler main window. The Status column opposite the project will shortly read Expired.

You can reschedule the task at any time by re-entering the Edit Task dialog box and changing the Expires On date to an appropriate time in the future.

Specifying a Task

Adding a project to the task list in Site Scheduler requires that you first select the project and specify the task (see below) and also set the actual schedule for when the task is to run (see Scheduling a Task on page 8-42).

- 1. In Site Scheduler, click **New Task** () on the toolbar or choose **New** from the Task menu to open the New Task dialog box.
- 2. In the Specification tab dialog, select Content Server from the Repository drop-down list, and click Browse opposite the Project field to open the Select a Project dialog box. Conduct a search of project files and then click the appropriate Select button for the one you want to schedule. The Select a Project dialog box closes and the Content Publisher dialog box opens.
- 3. You are prompted on whether you want Site Server to overwrite the existing version of the project file when Site Server runs the project, or whether you want to create a new version of the project file in Content Server. Click **Yes** to create a new revision of the project file in Content Server or **No** to overwrite the current version in the content server. (See Versioning the Project File (page 4-9).) The Content Server dialog box closes, and you are returned to the New Task dialog box.
- 4. In the Log File text box, enter a directory and file name for the log file you want to create to produce a report of the translation.

This information is from the perspective of the machine running Site Server. So if you enter C:\MyDocuments\Logfile.txt, the log file will be written to the server's local drive in the directory MyDocuments. Choose a drive and directory that is accessible by both the server and your login. (See UNC Paths on page 8-48.)

- 5. In Logging Level, select a logging level from the drop-down list. The highest level is 5. Click Clear log file if you want Site Server to create a new log file just for the scheduled translation. To create a continuous record of all logging, clear this check box. Site Server will then append new logging information to the log file as each scheduled translation takes place. (See Logging Options on page A-2 for more information.)
- 6. Under Steps, select the appropriate check boxes for the steps you want Site Server to complete when the project is run.

When you select Translate, the project is automatically updated. You can select all three check boxes, but you will lose the advantage of staging if you do so. To both stage and publish your project, you will want to schedule two tasks. In the first task, you would schedule the project for the sequence Translate-Stage (and thus select the Translate and Stage check boxes). For the second task, you would want to select only the Publish check box.

If you haven't staged your project and want to publish only, you would select the Translate and Publish check boxes. Conceivably, you might want to check only Translate.

- 7. In the Post-processing field, enter the name of the executable file that will trigger any post-processing activity, immediately the project has run. (You can enter only the file name if the executable resides in the root of the installed directory for Site Server; otherwise, enter a full path.)
- Under Notification, enter email address and notification level information to automatically send an email notification for the task when it runs. See Sending an E-Mail Notification for a Task (page 8-35) for information.
- 9. Click the **Schedule** tab to open that tab dialog, and complete the scheduling information, as explained in Scheduling a Task (page 8-42).

Site Scheduler Help

The following commands are available from the Help menu:

- Help Topics— Opens the Content Publisher Help system.
- About Site Scheduler— Opens the About Box for Site Scheduler, displaying copyright and version number information.

In addition, two toolbars offer assistance. The **Toolbar** provides quick access to main commands in Site Scheduler.

Figure 8-6 Site Scheduler Toolbar

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This displays the commands Connect, Disconnect, New Task, Edit Task, Delete Task, and Run. You can hide the toolbar by choosing Toolbar from the View menu. (Repeat this action to display the toolbar again.)

The Status Bar is found along the bottom of the Site Scheduler window.

Figure 8-7 Status bar:

For Help, press F1

As you pass your cursor over menu commands and buttons on the toolbar, a brief description of each appears on the status bar. You can hide the status bar by choosing Status Bar from the View menu. (Repeat this action to display the status bar again.)

Testing a Scheduled Project

You may want to test a project before its scheduled time to run to be sure that there will be no problems when the project runs later at the scheduled time. You can do this at any time, including when you first add the project to the task list (but not after the task has expired).

- 1. In the Site Scheduler window, select the task you want to test.
- 2. Click **Run** () on the toolbar or choose Run from the Task menu (or right-click the task and choose Run Task from the popup menu).

The Last Run column indicates progress as the task runs. It displays a green check mark to denote that the task has run successfully or a red cross to denote the task has not run successfully. In either case, the time of the test also appears in the column.

A task might fail to run for different reasons. For example, the project file may no longer exist, or the machine on which Site Server is running does not have access to the content server in which the project file resides. Once a task has been tested in this way, you can easily obtain preliminary information on how the task has run. See Reviewing Task Information (page 8-41).

Translation Status

The Status column of the task list in the Site Scheduler window displays the status of each project scheduled for translation. A project can be in one of five states:

- Waiting—The project is awaiting its appointed time to run.
- **Pending**—The project is ready to run, once other projects are completed.
- **& Running**—The project is currently running.
- Expired—The project has run the required number of times and is not scheduled to run again.
- Locked—The project schedule is currently being edited by someone else.

You may want to retain an expired project on the task list if you anticipate running it at some future time. That way, you won't have to enter most of the required information in the Edit Task dialog box again.

A task can only be edited if it is in the Waiting or Expired state.

UNC Paths

When you add a project to the task list, you will typically want to identify a log file to capture important information about the translation. This is done on the Specification tab dialog in the New Task dialog box.

When you choose a drive and directory for the log file, you should be sure to use UNC paths rather than DOS paths, as these are more universal, and users won't have to worry about whether or not they are using the same drive mappings as the server.

Example: \\News\Share might be the UNC equivalent of drive S:\.

To ensure that you use an UNC path, always use the Browse button opposite the Project text box to select the project file, and always start your search from Network Neighborhood in the Open dialog box (you can use the Look In drop-down box to locate Network Neighborhood). Starting your search from Network Neighborhood will ensure that a UNC path is returned in the Project text box in the New Task dialog box.

DOCUMENT INFORMATION

This section covers the following topics:

- Specifying Document Information (page 8-49)
- Inheriting Document Information From Source (page 8-50)
- Inheritance Settings (page 8-51)
- Conditional Disclosure (page 8-53)

Specifying Document Information

A required task in setting staging and publishing options is to decide what metadata you want to associate with the Web output you check into the content server. That metadata can be used to facilitate searches for information later.

At a minimum, you must specify Type, Author, and Security Groups (and any customized metadata that are also required) for your Web output to be successfully checked into the content server. This document information is always used for those output pages (frames, reference pages, etc.) that do not originate in a content server or the file system. For body pages, you have the option of inheriting document information (see Inheriting Document Information From Source on page 8-50).

- 1. In the Staging or Publishing Options dialog box, select a location (content server) for your staged or published output.
- 2. Click the **Document Information** button to open the Document Information dialog box.
- 3. From the Type, Author and Security Group drop-down lists, select the metadata you want to associate with your Web output.
- 4. Click the **Assign Info** button to associate the selected metadata and return to the Staging or Publishing Options dialog box.
- Click the Inheritance Settings button if you want to inherit metadata from source for output body pages (and see Inheriting Document Information From Source on page 8-50). Otherwise, click OK, and OK again, to return to the main window.

You can promote element-based metadata to a TOC, and that metadata can be published to a content server, too, just like the metadata associated with body pages.

Inheriting Document Information From Source

One optional task in setting staging or publishing options is to decide what metadata you want your output body pages to inherit from source. Whatever metadata is associated with those Web pages checked into the content server can be used to facilitate searches for information later.

At a minimum, you must specify document information (Type, Author, and Security Group) for your Web output to be successfully checked into the content server (see Specifying Document Information on page 8-49). This document information is always used for those output pages (frames, reference pages, etc.) that do not originate in a content server or the file system. It will be used for body pages, too, unless you choose to inherit document information from source. You can promote element-based metadata to a TOC, and that metadata can be published to a content server, too, just like the metadata associated with body pages.

- In the Staging or Publishing Options dialog box, select a location (content server) for your staged or published output. If you haven't already done so, click **Document Information** to specify document information for frames, reference pages, etc. (see Specifying Document Information on page 8-49).
- 2. Click Inherited Settings to open the Inherited Document Information dialog box.
- 3. Select the appropriate check boxes to identify those metadata that should be inherited and associated with the output body pages to be checked into the content server.
- 4. Click **OK** to return to the Staging or Publishing Options dialog box.
- 5. Click **OK** to return to the main window.

When Site Builder stages or publishes the project, it will examine all metadata that is available in the source documents of the project. That is, it will recognize all content server metadata specified in step 3 as well as any element-based standard and custom metadata that you have published to the content server. Where any metadata clash, Site Builder will use a hierarchy of metadata (see The Hierarchy of Metadata on page 6-81) to determine which metadata are associated with the staged or published output.

If you do not select (in step 3) one of the metadata that has already been specified for document information (Type, Author, and Security Group), the one specified will be used, instead (see Specifying Document Information on page 8-49).

For source documents that are on the file system, only standard and custom metadata can be inherited.

When Site Builder inherits from source, it applies the hierarchy to all non-empty metadata fields in the source documents. Say you publish the standard metadata Author to override the content server metadata Author. If a particular source document has no standard metadata for Author, Site Builder will inherit the content server metadata for that document, instead.

Staging options apply only to staged output, and publishing options apply only to published output. You need to set both options separately, and likely will want to set them the same way.

If, for a particular project, you set only staging options or only publishing options, any metadata you inherit will be inherited direct from the source. If you set both staging and publishing options, the metadata will come from your staged output (which will have obtained them from the source).

If, however, you set both staging and publishing options but only publish—and don't first stage—your project, then your output pages will not be able to inherit metadata. Site Builder (or Site Server) will try to inherit them from the staged output. It will fail to do so and will generate a publishing error.

Inheritance Settings

One of the keys to publishing metadata to a content server is the document information you choose to inherit when you set staging options or publishing options.

In setting these options, you begin by identifying a location (content server) for your staged or published output and specifying document information (see Specifying Document Information on page 8-49). This document information is used for those output pages (frames, reference pages, etc.) that do not originate in a content server or the file system. It will also be used for output body pages if you choose not to inherit from source.

When you inherit from source, you can place metadata in all of the metadata fields in the Inherited Document Information dialog box.

	on of the output files can be inherite s that generated them. Specify whi	
Field Caption	Field Name	
Account	dDocAccount	<u>H</u> elp
Author	dDocAuthor	
🗖 Title	dDocTitle	
🗖 Туре	dDocType	
Security Group	dSecurityGroup	
🗖 Release Date	dInDate	
Expiration Date	dOutDate	
Comments	xComments	

Figure 8-8 Inherited Document Information dialog

You must select the appropriate metadata field in order to inherit from source; otherwise, the only metadata that will be applied to your staged or published output will be the document information you have specified (see Specifying Document Information on page 8-49).

The fields shown are the default ones for Content Server. You may add custom fields to your instance of Content Server. (For Document Information, you must retain the three required fields of Type, Author, and Security Group, but you can create additional required fields, if you want.)

Once you select any given field, Site Builder will try to pull metadata from the source and place that metadata in the content server. In doing so, Site Builder will recognize all metadata available for a given field. Where there are multiple metadata available, it will apply a hierarchy of metadata (see The Hierarchy of Metadata on page 6-81) to decide which metadata is to be associated with the staged or published output. How you order metadata in Element Setup may determine which metadata are published (see Ordering Metadata on page 6-86).

When Site Builder inherits from source, it applies the hierarchy to all non-empty metadata fields in the source documents. Say you publish the standard metadata Author to override the content server metadata Author. If a particular source document has no standard

metadata for Author, Site Builder will inherit the content server metadata for that document, instead.

Content server metadata is automatically available for inheritance. Standard and custom metadata is available only if (a) you have made the metadata element-based, and (b) you have published the element to the content server, using one of the fields shown above (or one you have customized).

Conditional Disclosure

You can use "conditional disclosure" to limit the content that a user can view on your Web site.

As a result, if a user is denied access to a particular source document in Content Server, the user won't be able to:

- view any Web page created from that source document
- see any links in reference pages to a Web page created from that source document (assuming elements have been promoted from the document to the reference page)

Any links to that Web page may still exit elsewhere in the Web site. This could include Next Page and Previous Page buttons that reference the missing Web page. Trying to use any of these links will result in an Access Denied message.

Access is controlled by the security level assigned to each Web page. You apply security to Web pages by

- Inheriting security from the security level that was applied to the source document when it was checked into Content Server (see Inheriting Document Information From Source on page 8-50 for how to do this when setting staging or publishing options at the project level).
- Explicitly setting security at the project level by specifying document information in staging or publishing options for all output pages.
- Explicitly overriding inherited or specified security settings at the project level by setting security for a specific subpublication or document (see Overriding Staging and Publishing Options on page 8-21).

Finally, you must enable conditional disclosure in Content Publisher for it to take effect on the Web site.

Follow these steps to enable conditional disclosure:

- 1. Click **Project Options** on the View menu to open that dialog box.
- 2. Click **Repositories** to switch to that tab dialog.
- 3. Under Conditional Disclosure, select the **Enable conditional disclosure** check box.
- 4. Click OK.

This setting is project-specific and is therefore saved to the project file. The setting selected will apply whether you run the project locally, move it to a network location, or schedule it for translation by Content Server.

You should enable conditional disclosure only with projects that use Content Server for the source documents and for storing the Web output created for staging and publishing (not with the file system).

PUBLISHING TO A FILE SYSTEM

This section covers the following topics:

- Specifying Staging or Publishing Options for a File System (page 8-54)
- Specifying Linking When Publishing to a File System (page 8-55)
- About URL Templates (page 8-56)

Specifying Staging or Publishing Options for a File System

Staging is the process whereby Site Builder copies translated output to a staging server for review before the finally approved content is published to the publishing server (Web site).

The Publish command is the final command you use when you create a Web publication. When you publish, Site Builder copies your translated output to a publishing server. Among your options is the ability to stage or publish to a file system.

- 1. From the Run menu, select **Staging Options** or **Publishing Options** to open the Staging/Publishing Options dialog box.
- 2. On the Staging Options or Publishing Options tab dialog, select **File System** from the Repository drop-down list.
- 3. Click Browse opposite Pages to open the Select Publish Directory dialog box.

- 4. Locate and select the directory you want to use for output body pages.
- 5. Click **OK** to leave the Select Publish Directory dialog box and return to Staging Options or Publishing Options.

The directory you choose for Pages will automatically be used for Graphics and Gallery Graphics. You can use different directories, if you want.

- 6. Click **Details** to open the Publish Details dialog box. (To set options in this dialogue box, see Specifying Linking When Publishing to a File System on page 8-55.)
- 7. Click **OK** to return to the main window.

When you publish to a file system, you publish incrementally.

Specifying Linking When Publishing to a File System

When you publish to a file system, you must specify publish options. In addition to setting output locations, you can also specify URL template information that determines how a link will reference its target.

Links between documents and images are automatically fixed up when you publish to a Web site. Changing the target link information is optional. You may want to do this, for example, if your site and your images are on separate servers. By changing the URL template, you can set the target path for graphics to the graphics server, so the links to those images reference the correct server.

- 1. From the Run menu, select Publish Options.
- 2. In the Publish Options dialog box, complete the required information necessary to identify the file system and directory you are publishing to. See Specifying Staging or Publishing Options for a File System (page 8-54).
- 3. Click **Details** to open the Publish Details dialog box.
- 4. Enter one or more replacement parameters for a URL Template. (See About URL Templates on page 8-56 for a description of the defaults and each option you can set.)
- 5. Click **OK** to return to the Publish Options dialog box.

About URL Templates

Links between documents and images are automatically fixed up when you publish to a Web site. You can also specify URL template information that determines how a link will reference its target for pages, graphics, and gallery graphics by changing the default replacement parameters in a URL template. This option is available when you select File System, FTP, or HTTP as your repository.

You change URL templates in the Staging / Publishing Options dialog box (see Specifying Staging or Publishing Options for a File System on page 8-54). First select one of the repositories from the Repository drop-down list, and then click Details to open the Details dialog box.

You may want to change the parameters of a URL template if, for example, your site and your images are on separate servers. By changing the URL template, you can set the target path for graphics to the graphics server, so the links to those images will reference the correct server (see Example 2, below).

Example 1: Results Using Various Parameters

The table below shows how the URL to your targets would be set if you select the available replacement parameters and start from an output directory such as the following:

🔁 C:\Outpu	t			<u> </u>
File Edit	View F	avorites Tools	Help	-
🖨 Back 👻	⇒ × €	🛛 🔍 Search	🔁 Folders (3 ×
Address 🗋	C:\Outpu	t	-	€Go
Name 🛆	Size	Туре	Modified	
🚞 Images		File Folder	10/11/2002 8	3:31 AM
🖉 x.htm	10 KB	HTML Docum	10/11/2002 8	3:29 AM
🖉 x2.htm	5 KB	HTML Docum	10/11/2002 8	3:29 AM
•				
3 object(s)	14.6	кв 📃 Му	Computer	1.

Figure 8-9 Replacement parameters

In this example, the Images folder contains "mygraphic.gif," and x2.htm contains a hyperlink to another file that also contains an anchor tag, such as : The server URL is http://myserver.com/.

The results in the table apply to the file system, FTP, and HTTP repositories unless otherwise noted.

Replacement Parameter	Description	Target URL Result
%%RELURL%%	Replaces the parameter with the relative URL from the source document to the target.	Images/mygraphic.gif
%%PATH%%	Replaces the parameter with the entire path of the target in the output area.	C:/Output/Images/mygraphic.gif
%%SERVER%%	When using an FTP or HTTP repository, replaces the parameter with the Server Name entered in the Destination dialog box. Access the dialog box by clicking Browse for an output location from the Staging / Publishing Options dialog box.	The server name entered in the Destination dialog box, such as "myserver.com."
%%DIR%%	Replaces the parameter with a path that is relative to the location specified under "output locations" in the Staging / Publishing Options dialog box.	Images
%%FILE%%	Replaces the parameter with the file name. This is typically used for graphics.	mygraphic.gif
%%PT%%	Replaces the parameter with an anchor.	mark

Replacement Parameter	Description	Target URL Result
%%# P T%%	Replaces the parameter with an anchor. This form includes the initial number sign (#).	#mark

If you are using ASP or CGI files, you may want to use %%PT%% rather than %%#PT%%. This may save you steps in a programming environment, because you will not need to remove the initial number sign (#).

The following table lists the default URL templates, which use the replacement parameters shown above. The Target URL Result (last column) follows the same example above.

Default URL Templates	Description	Target URL Result
%%RELURL%% %%#PT%%	Replaces the parameter with a relative path and also an anchor (if one exists). This is the default setting for File System options, and for FTP and HTTP Relative URL Template options.	x2.htm#mark
<protocol>: //%%SERVER%% %%DIR%%/ %%FILE%%%%%# PT%% [Note the forward slash between the "DIR" and "FILE" entries.]</protocol>	Replaces the parameter with a full URL. This is the default setting for FTP and HTTP Absolute URL Template options, where <protocol> is FTP or HTTP.</protocol>	http://myserver.com/Output/ images/ mygraphic.gif

Example 2: Linking Graphics to a Specific Server

In this example, you are publishing to the file system. The site content and images are on separate servers, as follows:

Site content:	http://www.companysite.com/
Images:	http://www.companyimages.com

You want to set up your Web site so that when you publish, the target URLs, which are the links to the graphics, point to the images server listed above. To do this, enter the following under Graphics, where <image server URL> represents the domain name of the server that contains the images:

http://<image server URL>/%%DIR%%/%%FILE%%

The following graphic shows how you could set options in the Details dialog box where the image server is www.stellentimages.com.

Figure 8-10 Details dialog

Publish Options	×
URL template When publishing Web pages you can specify how links between those pages should be created. The following replacement parameters are available:	Cancel
%%RELURL%% = Relative URL%%PATH%% = Full File System Path%%DIR%% = Path relative to the ftp server root%%FILE%% = Graphic file name%%PT%% = Target fragment identifier%%#PT%% = Target fragment identifier with initial delimiter	
Pages:	
2%RELURL%%%#PT%%	
Graphics:	
http://www.stellentimages.com/%%DIR%%/%%FILE%%	
Gallery Graphics:	
2%RELURL%%%#PT%%	

PUBLISHING TO AN FTP SERVER

This section covers the following topics:

- Publishing to an FTP Site (page 8-60)
- Proxy Settings for an FTP Site (page 8-61)
- Specifying Staging and Publishing Options for an FTP Site (page 8-61)
- Updating Source Documents From an FTP or HTTP Site (page 8-62)
- Specifying a Link When Publishing to an FTP Site (page 8-63)

Publishing to an FTP Site

The Publish command is the final command you use when you create a Web publication. When you publish Site Builder copies your translated output from the file system to another repository. Among your options is the ability to publish to an FTP site.



Caution: Content Publisher cannot be used to move files without a file extension.

- 1. From the Run menu, select **Publishing Options**.
- 2. On the Publishing Options tab dialog of the Staging/Publishing Options dialog box, select **FTP** from the Repository drop-down list.
- 3. Click **Browse** opposite Pages to open the Publish Destination dialog box. To complete the required information in that dialog box, see Specifying Staging and Publishing Options for an FTP Site (page 8-61).

The FTP directory you choose for Pages will automatically be used for Graphics and Gallery Graphics. You can use different directories, if you want. All directories must already exist.

- 4. Click **Details** to open the Publish Details dialog box (see Specifying a Link When Publishing to an FTP Site on page 8-63).
- 5. Click **OK** to return to the main window.

You can also stage to an FTP site. See Specifying Staging and Publishing Options for an FTP Site (page 8-61) for more information.

When you publish to an FTP site, you publish incrementally.

Proxy Settings for an FTP Site

You can select source documents from different repositories, including an FTP site. You can also stage and publish to those repositories. If you are connecting to the FTP site through a proxy server, you need to provide the address and port number for the server.

- 1. In the Proxy Settings dialog box, click Access the World Wide Web using a proxy server.
- 2. In the Address box, enter the server name (example: **ftp.stellent.com**). In the Port box, enter the port of the server being used for the FTP address.
- 3. If there are any addresses for which the proxy server should be bypassed, enter them in the box below. You can separate multiple entries with semicolons.

Example ftp.stellent.com;ftp.infoaccess.com

4. Click **OK** to return to the FTP Source Document dialog box.

For more information, see Adding a Document (page 5-31) and Adding a Directory Item (page 5-89).

You can also create a Dynamic Directory Item from an FTP site. See Adding a Dynamic Directory Item From the File System or an FTP Site (page 5-93) for more information.

Specifying Staging and Publishing Options for an FTP Site

Staging is the process whereby Site Builder copies translated output from the file system to a staging server for review before the finally approved content is published to the publishing server (Web site).

The Publish command is the final command you use when you create a Web publication. When you publish Site Builder copies your translated output from the file system to another repository. Among your options is the ability to stage or publish to an FTP site.

- 1. From the Run menu, select Staging Options or Publishing Options.
- 2. On the Staging Options or Publishing Options tab dialog of the Staging/Publishing Options dialog box, select **FTP** from the Repository drop-down list.
- 3. Click Browse opposite Pages to open the Publish Destination dialog box.
- 4. Under Destination, enter the FTP server name. Neither the protocol (ftp://) nor a closing forward slash is required.

Example ftp.company.com.

- 5. Under Directory to contain your Web pages, click **Browse** and locate the directory you want to use for output body pages. The directory you choose will automatically be used for Graphics and Gallery Graphics. You can use different directories, if you want. All directories must already exist.
- 6. Under Login Credentials, click **Use Anonymous FTP** if you are staging or publishing to an FTP site that permits an anonymous user. If you require an FTP user account to stage or publish to the site, click **Use specific credentials** and enter both your user account and password.
- 7. Click **Use specific server TCP/IP port** if the server at the FTP site you are connecting to does not use the standard FTP port. Then enter the port number in the box.
- 8. Click OK.
- 9. Click **OK** to leave the Publish Destination dialog box and return to Staging Options or Publishing Options.



Note: You can stage or publish to any FTP site that you can connect to. But when using "Anonymous." you may find that you are restricted to certain levels of files (which may also be the case with an FTP user account).

If you are connecting to the FTP site through a proxy server, click **Proxy** to open the Proxy Settings dialog box (see Proxy Settings for an FTP Site (page 8-61)).

Updating Source Documents From an FTP or HTTP Site

When you start a new project and add source documents from an FTP or HTTP site, Site Builder makes copies of those documents, places them in a temporary directory on the file system, and translates the copies. Site Builder will continue to use those copies for translation during your current session in Site Builder unless you formally update the source documents.

So if there is a delay between the first time you translate and the last time you translate before publishing, you should update the copies of the source documents in the temporary directory. To update source documents, click **Update Versions** (

Copies of the latest versions of the source documents on the FTP or HTTP site have been placed in a temporary directory on your file system. You can now translate one last time and then publish. (See Update Versions Command on page 8-9.)

Site Builder copies a source document the first time it is "requested." This could be when you associate a template with the source document in the Choose Template dialog box (with the preview functionality turned on), when you preview the document in the Edit Template dialog box, or when you first translate the document. Also, Site Builder will delete the temporary file each time you close the project and create a new one the next time you start the project and the document is first requested.

Because Site Builder copies source documents only when they are "requested," the Status column in the main window may be misleading. You may see a green check mark even though a more recent version of a document is available from an FTP or HTTP site. So always click Update Versions (see Update Versions Command on page 8-9) before your final translation. If a green check mark opposite a document turns to a red cross, you'll know that Site Builder has just copied an updated version of that document into the temporary directory, ready for translation.

Specifying a Link When Publishing to an FTP Site

When you publish to an FTP site, you must specify publish options. This includes providing the necessary link to ensure that your published output can be identified on your FTP site by your Web server.

- 1. From the Run menu, select Publish Options.
- 2. In the Publish Options dialog box, complete the required information necessary to identifying the FTP site and directory you are publishing to. See Publishing to an FTP Site (page 8-60) for more information.
- 3. Click **Details** to open the Publish Details dialog box.
- 4. Select the appropriate link from the **Absolute URL template** drop-down list. The default is:

ftp://%%SERVER%%%%DIR%%/%%FILE%%%%%#PT%%% (note the forward slash between the "DIR" and "FILE" entries)

For ASP files, you should use **%%PT%%** (the target fragment identifier), rather than **%%#PT%%** (the target fragment identifier with initial delimiter).

5. Click **OK** to return to the Publish Options dialog box.

You can change this link. For example, some URLs specify both the user and password. Any link you enter will be preserved for future use.

PUBLISHING TO AN HTTP SERVER

This section covers the following topics:

- Publishing to an HTTP Site (page 8-64)
- Proxy Settings for an HTTP Site (page 8-65)
- Specifying Staging and Publishing Options for an HTTP Site (page 8-65)
- Updating Source Documents From an FTP or HTTP Site (page 8-66)
- Specifying a Link When Publishing to an HTTP Site (page 8-67)

Publishing to an HTTP Site

The Publish command is the final command you use when you create a Web publication. When you publish Site Builder copies your translated output from the file system to another repository. Among your options is the ability to publish to an HTTP site.

You can only publish to an HTTP site that allows files to be written there. Also, the published output will not recreate the hierarchy of publications in your project. However, your Web publication should still display properly on your Web site.

- 1. From the Run menu, select **Publishing Options**.
- 2. On the Publishing Options tab dialog of the Staging/Publishing Options dialog box, select **HTTP** from the Repository drop-down list.
- 3. Click **Browse** opposite Pages to open the Publish Destination dialog box. To complete the required information in that dialog box, see Specifying Staging and Publishing Options for an HTTP Site (page 8-65).

The HTTP directory you choose for Pages will automatically be used for Graphics and Gallery Graphics. You can use different directories, if you want. All directories must already exist.

- 4. Click **Details** to open the Publish Details dialog box (see Specifying a Link When Publishing to an HTTP Site on page 8-67).
- 5. Click **OK** to return to the main window.

You can also stage to an HTTP site. See Specifying Staging and Publishing Options for an HTTP Site (page 8-65).

When you publish to an HTTP site, you publish incrementally.

Proxy Settings for an HTTP Site

You can select source documents from different repositories, including an HTTP site. You can also stage and publish to those repositories. If you are connecting to the HTTP site through a proxy server, you need to provide the address and port number for the server.

- 1. In the Proxy Settings dialog box, click Access the World Wide Web using a proxy server.
- 2. In the Address box, enter the server name (example: **www.stellent.com**). In the Port box, enter port of the server being used for the HTTP address.
- 3. If there are any addresses for which the proxy server should be bypassed, enter them in the box below. You can separate multiple entries with semicolons.

Example www.stellent.com;www.infoaccess.com

4. Click **OK** to return to the HTTP Source Document dialog box.

See also:

- Adding a Document (page 5-31)
- ✤ Adding a Directory Item (page 5-89)
- Publishing to an HTTP Server (page 8-64)

Specifying Staging and Publishing Options for an HTTP Site

Staging is the process whereby Site Builder copies translated output from the file system to a staging server for review before the finally approved content is published to the publishing server (Web site).

The Publish command is the final command you use when you create a Web publication. When you publish Site Builder copies your translated output from the file system to another repository. Among your options is the ability to stage or publish to an HTTP site.

- 1. From the Run menu, select Staging Options or Publishing Options.
- 2. On the Staging Options or Publishing Options tab dialog of the Staging/Publishing Options dialog box, select **HTTP** from the Repository drop-down list.
- 3. Click Browse opposite Pages to open the Publish Destination dialog box.
- 4. Under Destination, enter the HTTP server name. Neither the protocol (http://) nor a closing forward slash is required.

Example: www.stellent.com.

5. In the Subfolder Containing Your Web Pages text box, enter the path and name of the directory you want to publish to. To specify the directory you want to stage or publish to, you can open the HTTP site in your browser and select the directory from the directory listing. Then copy the URL from the Address or Location bar and paste it into the Subfolder Containing Your Web Pages text box.

The HTTP directory you choose for Pages will automatically be used for Graphics and Gallery Graphics. You can use different directories, if you want. All directories must already exist.

- 6. Under Login Credentials, click **Use anonymous connection** if you are publishing to an HTTP site that permits an anonymous user. If you require an HTTP user account to stage or publish to the site, click **Use specific credentials** and enter both your user account and password.
- 7. Click **Use specific server TCP/IP port** if the server at the HTTP site you are connecting to does not use the standard HTTP port. Then enter the port number in the box.
- 8. Click OK.
- 9. Click **OK** to leave the Publish Destination dialog box and return to Staging Options or Publishing Options.

You can stage or publish to any HTTP site that you can connect to. But when using "Anonymous" you may find that you are restricted to certain levels of files (which may also be the case with an HTTP user account).

If you are connecting to the HTTP site through a proxy server, click **Proxy** to open the Proxy Settings dialog box (see Proxy Settings for an HTTP Site on page 8-65).

Updating Source Documents From an FTP or HTTP Site

When you start a new project and add source documents from an FTP or HTTP site, Site Builder makes copies of those documents, places them in a temporary directory on the file system, and translates the copies. Site Builder will continue to use those copies for translation during your current session in Site Builder unless you formally update the source documents.

Site Builder copies a source document the first time it is "requested." This could be when you associate a template with the source document in the Choose Template dialog box

(with the preview functionality turned on), when you preview the document in the Edit Template dialog box, or when you first translate the document. Also, Site Builder will delete the temporary file each time you close the project and create a new one the next time you start the project and the document is first requested.

So if there is a delay between the first time you translate and the last time you translate before publishing, you should update the copies of the source documents in the temporary directory. To do so, click **Update Versions** (

Copies of the latest versions of the source documents on the FTP or HTTP site have been placed in a temporary directory on your file system. You can now translate one last time and then publish. (See Update Versions Command on page 8-9.)

Because Site Builder copies source documents only when they are "requested," the Status column in the main window may be misleading. You may see a green check mark even though a more recent version of a document is available from an FTP or HTTP site. So always click Update Versions (see Update Versions Command on page 8-9) before your final translation. If a green check mark opposite a document turns to a red cross, you'll know that Site Builder has just copied an updated version of that document into the temporary directory, ready for translation.

Specifying a Link When Publishing to an HTTP Site

When you publish to an HTTP site, you must specify publish options. This includes providing the necessary link to ensure that your published output can be identified on your HTTP site by your Web server.

- 1. From the Run menu, select Publish Options.
- 2. In the Publish Options dialog box, complete the required information necessary to identifying the HTTP site and directory you are publishing to. See Publishing to an HTTP Site (page 8-64) for more information.
- 3. Click **Details** to open the Publish Details dialog box.
- 4. Select the appropriate link from the **Absolute URL template** drop-down list. The default is:

http://%%SERVER%%%%DIR%%/%%FILE%%%%%#PT%%% (note the forward slash between the "DIR" and "FILE" entries)

For ASP files, you should use **%%PT%%** (the target fragment identifier), rather than **%%#PT%%** (the target fragment identifier with initial delimiter).

5. Click **OK** to return to the Publish Options dialog box.

You can change this link, if you want. For example, some URLs specify both the user and password. Any link you enter will be preserved for future use.

PUBLISHING TO CONTENT SERVER

This section covers the following topics:

- Content Servers (page 8-68)
- Connecting to Content Server (page 8-69)
- Choosing a Content Server (page 8-69)
- Updating Source Documents in Content Server (page 8-70)
- Updating to the Latest Released Version of a Source Document (page 8-71)
- Selecting a Presentation Option for a Query Results Page (page 8-71)
- Suppressing the Info Icon on Web Pages (page 8-72)
- Finding the Home Page (page 8-72)
- Registration (page 8-73)
- File Naming Conventions (page 8-79)

Content Servers

The ideal setup in publishing is three content servers:

- source server for source documents (including graphics, associated files, and the project file itself)
- staging server for staged output
- publishing server for published output

Conceivably, staging and publishing could be done on the same content server. You might even use a single content server for all three purposes. Your project could also draw files from more than one source server.

The number of content servers in use does not affect workflow or registration. In other words, the procedures you follow to register a project on a source server and a staging server are unchanged even though a single server is used for both source documents and

staging. Also, staging criteria workflow is still possible where the source server and the staging server are the same content server.

Connecting to Content Server

For Content Publisher to run successfully with Content Server, you need to complete the following:

On each machine on which either Site Builder or Site Server is installed

Register the name of each content server and also the name of the HTTP server that is hosting each content server. See Registering a Content Server (page 8-74).

On each machine on which Site Server is running

Register a username and password in order to access each content server. See Registering a Username and Password for Site Server (page 8-27).

Choosing a Content Server

When you use Content Publisher with Content Server, you use the Select a Repository dialog box to first select Content Server as your repository of choice for adding source documents, saving project files, and so on (see Selecting a Repository on page 5-8).

Figure 8-11 Select a Repository dialog



If Site Builder is configured to work with more than one content server, once you select Content Server in the Select a repository dialog box, the Choose a Content Server dialog box will open for you to select the particular content server you want to work with.

Choose your content server of choice from the drop-down list.

If you will be working only with the Content Server, you can click the **Don't show this dialog box again** check box in the Select a Repository dialog box. If you have multiple content servers configured on your machine, the Choose a Content Server dialog box will still open each time.

Updating Source Documents in Content Server

You will want to use the Update Versions Command (page 8-9) as you create your project. You won't necessarily want to use the command before each translation, but you will certainly want to use it at critical times during project creation to be sure that what you are reviewing contains the latest content. This obviously becomes more important during staging, and more important still before you finally publish.

The Update Versions command is important because when you add documents that reside in Content Server, you do not check out those documents as you do in your normal use of Content Server. Rather, Site Builder identifies the current version of each document at the time it is added to the publication and obtains a working copy of that version for translation.

As a result, someone else may check out one or more of those documents during your session in Site Builder, between the time you start your project and are ready to publish. That's why you may want to use the Update Versions command before your final translation.

Click Update Versions () on the toolbar.

Site Builder checks the repository and identifies the latest released version of each document in your publication. Any updated document will have an 8after it in the Status column. You should translate and view your publication one more time before you click Stage to check all output files into the staging server (or click Publish to place them in a publishing server, assuming you haven't staged your project).

You can specify a particular version of a source document. In that event, Site Builder always translates the specified version and simply ignores any other versions of the document when you click Update Versions. See Version Options When Translating a Source Document (page 5-28).

Clicking Update Versions on the Run menu or toolbar updates all source documents in your publication (unless you have specified that a particular version be used). To update selectively, select only the appropriate subpublication in the Publication pane, or Directory Item or document in the Contents pane, right-click, and then choose Update Versions from the popup menu. Site Builder will check for new versions of only those source documents included in your selection.

You can select multiple documents with the Ctrl key and the mouse.

Updating to the Latest Released Version of a Source Document

The default behavior in Content Server is for the latest released version of a source document to be used each time you translate. Thus, each time you enter the Document Details dialog box, the **Allow refresh to latest released version** check box is selected at the top of the dialog box.

You may have previously specified that a particular version be used and now want the latest released version to be used, instead.

- 1. In Site Builder, right-click the appropriate source document in the Contents pane and choose **Properties** from the popup menu.
- 2. In the Document Properties dialog box, click the **Info** button (**[]]**) to open the Document Details dialog box.
- 3. At the top of the dialog box, select the **Allow refresh to latest released version** check box.
- 4. Click the **Select** button to close the Document Details dialog box.

Each time you use the Update Versions Command (page 8-9), Site Builder will now use the latest released version of this source document when you translate or publish in future.

Selecting a Presentation Option for a Query Results Page

When you create a Query page for a Web publication, you set options for the Query results page. Among them are the presentation format for the information that will be returned from a search on the Query page.

In the Results Presentation Option dialog box, select from the Name drop-down list the presentation format you want to use. (Your administrator creates these options.) A description of the presentation format and the text that will display in the results page appear below.

Text 1 and Text 2 typically include the Content ID and Title (the administrator can define the fields in different ways), and will appear in the Description column of the Query results page. You can select additional columns to appear on the results options page. See Setting Options for a Query Results Page (page 6-193) for more information.

Suppressing the Info Icon on Web Pages

One optional task in setting staging options is to decide whether you want to use the special Info icon on every Web page of your staged output. This icon provides access to the Content Information page for a Web page, including the special problem report section (if you have registered the project). It is added by default to every Web page of your staged output.

You don't have to use the Info icon (1) when you stage. For example, you may decide to use it initially when you first stage your project, and then decide later to leave it off when you feel that your staged version is almost ready to be published. At that time you will be able to view your Web pages exactly as they should appear on your Web site.

To suppress the Info icon on output pages, on the Staging Options dialog box, select the **Suppress placement of Info buttons on staged output** check box.

The Info icon will be removed from your Web pages the next time you stage the project.

Each time you change this option, Site Builder will automatically rebuild your entire staged output, even if you have only changed one or two source documents since the last time you translated the project.

Finding the Home Page

Once you have staged a Web publication and want to view it, you can open the publication from Content Server by using the home page of the publication as an entry point.

- 1. In Content Server, open the Search page.
- 2. Create a full-text query by typing **dPublishType=H** in the full text search box, and then click **Search**.

The Query results page displays the top page of each publication. This could be a frame (Frame.htm is the default in Content Publisher), a TOC (if the publication is unframed), or the first page of your publication (if the publication is unframed and doesn't contain any reference pages)

3. Click the appropriate top page to open the complete publication in your browser.

Registration

This section covers the following topics:

- Registration in Content Publisher (page 8-73)
- Registering a Content Server (page 8-74)
- Registering a Content Server by Running the Mini-Installer (page 8-74)
- Registering a Content Server by Manually Creating a Registry Entry (page 8-75)
- Registering a Project to Preview a Source Document (page 8-76)
- Registering a Project on a Staging Server (page 8-77)
- Registering a Username and Password for Site Server (page 8-77)

Registration in Content Publisher

Registration in Content Publisher takes many forms, all of which help Content Publisher connect and share files with Content Server.

- You register a content server if you plan to share documents between Content Publisher and Content Server (includes source documents, staged, and published output). See Registering a Content Server (page 8-74).
- You register a project on a source server in order to preview the translated version (the Web page) of a source document. See Registering a Project to Preview a Source Document (page 8-76).
- You register a project on a staging server to enable staging workflow and the use of 'problem reports' for your staged Web pages. See Registering a Project on a Staging Server (page 8-77).
- When running Site Server on a separate machine (from Content Publisher), you register a username and password in order to access Content Server. See Registering a Username and Password for Site Server (page 8-27).

There is another form of registration that Content Publisher performs automatically when you publish a project to Content Server. As a result, files on the content server can be easily monitored, and your projects run much faster.

Registering a Content Server

For Content Publisher to work successfully with Content Server, both Site Builder and Site Server must have access to each content server in use. This is true whether the content server is a source of documents for your projects or serves as a location for the staged and published output that your projects generate.

During installation you can register a single content server by providing the name of the content server and also the name of the HTTP server that is hosting the content server. You may need to register additional content servers (say, for the staged and published output your projects generate). You can do this either by

- Running the mini-installer provided on your Content Publisher product disc (see Registering a Content Server by Running the Mini-Installer on page 8-74), or
- Manually creating a Registry entry (see Registering a Content Server by Manually Creating a Registry Entry on page 8-75).

Running the mini-Installer simply automates the process of creating the required Registry entry.

Registering a Content Server by Running the Mini-Installer

During the installation of Site Builder or Site Server, you can register a single content server by providing the name of the content server and also the name of the HTTP server that is hosting the content server. This is essential if the client or server is to have access to Content Server.

You may need to register additional content servers (say, for the staged and published output your projects generate). You can do so at any time by running the mini-Installer that is available on your Content Publisher product disc.

To run the mini-Installer:

- 1. Insert your Content Publisher product disc in the disc drive of the machine on which either Site Builder or Site Server is installed.
- 2. Open the Support folder and double-click CSSetup.exe.
- 3. Complete the information requested on each of the installer screens that appear, in turn.
- 4. Click **Finish** to complete the running of the mini-Installer.

You have created the necessary Registry entry. You can begin using the client or server immediately to access the content server you have just registered.

Follow the above steps to register the same content server on any additional machines, as necessary, and also to register additional content servers on the same machine.

The mini-Installer simply automates the process of creating the required Registry entry. To manually create the entry or to edit an existing entry, see Registering a Content Server by Manually Creating a Registry Entry (page 8-75).

Registering a Content Server by Manually Creating a Registry Entry

During the installation of Site Builder or Site Server, you can register a single content server by providing the name of the content server and also the name of the HTTP server that is hosting the content server. This is essential if the client or server is to have access to Content Server.

You may need to register additional content servers (say, for the staged and published output your projects generate). You can do so at any time by manually creating the required Registry entry.

- 1. From the Start menu, click **Run**.
- 2. In the Open text box, type **regedit** and click **OK**.
- 3. Locate the following Registry key:

HKEY_LOCAL_MACHINE\SOFTWARE\Stellent\Content Publisher\Repository\ 6.0\Stellent\CS List

- 4. Right-click CS List, and choose New and then Key from the popup menu.
- 5. In the edit box that appears, replace **New Key #1** with the name of the content server, say, **Dev**. Press **Enter**.
- 6. Right-click the new Key (say, **Dev**) and select **New** and then **String Value** from the popup menu.
- 7. Enter the String Name CgiURL and press Enter.
- 8. Right-click **CgiURL** and choose **Modify** from the popup menu. In the Value Data text box, enter the following if you are using Microsoft Explorer Information Server to host Content Server:

http://<HTTP server name>/intradoc-cgi/idc_cgi_isapi.dll

For example, if your HTTP server is named ContentServer, you would enter:

http://contentserver/intradoc-cgi/idc_cgi_isapi.dll

If, instead, you are using Netscape Enterprise Server to host Content Server, enter the following in the Value Data box:

http://<HTTP server name>/intradoc-cgi/nph-idc_cgi.exe

Example:

http://contentserver/intradoc-cgi/nph-idc_cgi.exe

9. Press Enter.

You have created the necessary Registry entry. You can begin using the client or server immediately to access the content server you have just registered.

You can edit this entry at any time, should you later change the name of your content server or HTTP server.

Follow the above steps to register the same content server on additional machines, as necessary, and also to register additional content servers on the same machine.

You can automate the process of registering a content server by using the mini-Installer available on the Content Server product disc. See Registering a Content Server by Running the Mini-Installer (page 8-74).

Registering a Project to Preview a Source Document

Registering a project on a source server allows a content author to preview a source document as it is checked into that source server. (Previews are possible any time the document is checked in.)

- 1. With a project open in Site Builder, click **Project Registration** on the View menu to open the Project Registrations dialog box.
- 2. In the Registrations window, select the name of the content server in which your source documents reside and double-click the red cross opposite, in the Preview column, to turn it into a green check mark.
- 3. Click OK.
- 4. Click **Save** (\square) on the standard toolbar.

You have registered the project on the specified source server.

Previews work only with documents in Content Server. If the source document is part of a Directory Item, the Directory Item must be "Restricted" (see Specifying a Directory Item to Facilitate Previews on page 5-28). In the case of a source document that is not part of a Directory Item, the preview won't be possible until the document has been added to your

project and associated with a template. So it won't be possible the first time you check the document into the content server.

Registering a Project on a Staging Server

One optional task in setting staging options is to register the project on the staging server in order to facilitate "staging criteria workflow." Doing so will also result in the creation of the special Content Information page containing a problem report section that can be used by the reviewer to send a report to the content author and project author highlighting a problem with a particular Web page.

You can only register a project that has been saved to Content Server. (The option is grayed out otherwise.)

- 1. On the Staging Options dialog box, select the **Register the project with the Content Server for staging workflow** check box.
- 2. Click **OK** to close the Staging Options dialog box and return to the Staging/Publishing Options dialog box.

The project will remain registered as long as you continue to stage to the designated content server or clear this check box (see Unregistering a Project on a Staging Server on page 8-8).

Registering a Username and Password for Site Server

Each machine on which Site Server is installed requires a username and password in order for Site Server to access Content Server. System administrators can use password encryption to configure the machines on which Site Server is installed, using the utility PswdCfg.exe, which is available in the Support folder of the Content Publisher product disc.

Typically, the system administrator will want to encrypt passwords during the setup of Site Server. In that event, before running the utility the system administrator should first register the names of all content servers that Site Server will require access to.

1. Double-click **PswdCfg.exe** in the \Resources\en folder of your Content Publisher installation directory to run the encryption utility. The Access Configuration dialog box opens.

dpetersonpc Master_on_xcsq	а	
Authentication (Credentials	
U <u>s</u> er Name:	landerse	

Password:		

Figure 8-12 Access configuration dialog

- 2. Select the name of the first content server you want to configure.
- 3. Under Authentication Credentials, provide the user name and password (twice), as required.
- 4. Click **Update**. A dialog box will appear, to confirm that the username and encrypted password have been successfully registered.

Figure 8-13 Access dialog



- 5. Select each additional content server, in turn, that you want to configure, and repeat steps 3 and 4.
- 6. When you have configured all the content servers necessary for the machine on which Site Builder is installed, click the Close button to the right of the title bar.
- 7. Follow the above steps to configure additional machines on which Site Server is installed.

You can register only one content server during installation. However, you can register additional content servers after installation. (See Registering a Content Server by Running the Mini-Installer on page 8-74.) You can run PswdCfg.exe at any time to configure additional content servers you may register later.

You can run PswdCfg.exe at any time to change an encrypted password. If for some reason you no longer want a password to be encrypted, you will have to remove the registry entry manually from the Registry and create a new entry.

File Naming Conventions

This section covers the following topics:

- Adding a Prefix to Output File Names (page 8-79)
- Publishing to the Content Server Without a Unique Suffix (page 8-81)
- Setting Check-In File Extensions (page 8-82)
- Illegal Characters in a Title (page 8-83)

Adding a Prefix to Output File Names

You can add a prefix to your staged or published output to help create predictable file names when publishing to Content Server. Using this option, you can more easily distinguish between published files in different projects.

Prefixes can be added at the project, publication, and Directory Item levels. Site Builder adds the prefixes to the output files during translation. With this feature, you can use the same source document in multiple publications of the same project.

Example: You could add document.doc to both PublicationA and PublicationB of a project if you apply a prefix to the output file in one of the publications. If you add a "test" prefix to PublicationA, during translation that file becomes testdocument.htm, while the output file name for PublicationB remains document.htm.

You can add multiple prefixes in a project. Prefixes are appended to each other, and the prefix assigned to the closest publication always takes priority over other publications.

Example: Your publication hierarchy and prefix settings are as follows:

Level	Prefix
Project	Р

Level	Prefix
Publication 1	1
Publication 2	2
Publication 3	3
Directory Item 4	4

Using the above example:

- If you set prefixes for the Project, Publication 3, and Directory Item 4, the prefix appended to output files for the documents contained in the Directory Item would be P34.
- If you set a prefix for the Project, Publication 2, Publication 3, and Directory Item 4, the prefix for the documents contained in the Directory Item would also be **P34**, since Publication 2 is not directly related to Directory Item 4.
- If you set a prefix for Publication 3 and Directory Item 4, without setting any other prefixes, the prefix for the documents contained in Publication 3, except Directory Item 4, would be 3. The prefix for items contained in Directory Item 4 would be 34. There would be no prefix associated with items contained in the Project through Publication 2 levels.

Specifying a Prefix at the Project Level

Follow these steps to specify a prefix at the project level:

- 1. Click **Project Options** on the **View** menu.
- 2. On the **File Naming** tab dialog, under Output Name Prefix, enter the prefix to apply to each output file in the project.
- 3. Click OK.

To specify a prefix at the publication level

- 1. Right-click the publication in the Publication Hierarchy pane.
- 2. Select **Properties** from the popup menu.
- 3. In the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this publication.
- 4. Click OK.

Specifying a Prefix at the Directory Item Level

Follow these steps to specify a prefix at the Directory Item level:

- 1. In the Contents pane, right-click the Directory Item and choose **Properties** from the popup menu to open the Properties dialog box.
- 2. In the General tab dialog, in the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this Directory Item.
- 3. Click OK.

When publishing to the content server, ensure that the file name, including all prefixes, is no more than 30 characters.

You may also want to generate document names from file names only, instead of appending a unique suffix, when adding prefixes to output file names (see Publishing to the Content Server Without a Unique Suffix on page 8-81).

Publishing to the Content Server Without a Unique Suffix

When files are staged or published to Content Server, by default Content Publisher appends a unique suffix to each file name when the file is checked in. This ensures file name uniqueness within the content server. If you prefer, you can publish to the content server without the unique suffix. You may want to use this in conjunction with the prefix option so that you can more easily recognize and predict the file name.

- With your translated project open in Site Builder, click Staging Options or Publishing Options on the Run menu to open the Staging/Publishing Options dialog box.
- 2. Under Repository, select Content Server from the drop-down list.
- 3. On the Staging Options or Publishing Options tab dialog, click the **Browse** button opposite Pages to open the Staging or Publishing Options dialog box.
- 4. Under Document Names, select **Generate document names from file names**. When this option is selected, only the file name, with its prefix (if added), is published to the content server, such as P34document.hcsp. When this option is not selected, the unique suffix is appended to the end of the file, such as P34document_ia937498-2.hcsp.

This option is also available at the publication, Directory Item, and document levels.

Setting Check-In File Extensions

You can specify the file extensions that Site Builder assigns to files when checking documents into the content server during staging or publishing. This allows flexibility in determining the final URLs of published documents.

You can specify that either the extension created during translation or a file extension you specify is used during check-in. If using a specific extension, most often you will want to accept the default, which is **hcsp**.

When publishing Query Pages, you should ensure that an **hcsp** extension is used, as those pages must contain the **hcsp** extension when checked into the content server.

You can specify file extensions for check-in to the content server at the project, publication, Directory Item, and document levels.

See Overriding Staging and Publishing Options (page 8-21) for hierarchy information and which setting takes precedence over another.

Follow these instructions to set a file extension at the project level:

- 1. Click **Staging Options** or **Publishing Options** from the **Run** menu depending on which option you are setting to open the Staging/Publishing Options dialog box.
- 2. When setting output locations for pages, click **Browse** to open the corresponding staging options or publishing options dialog box.
- 3. Under File Extensions, do one of the following:
 - if you want to check in files using the extension generated during translation, click
 Check in documents using original file extensions.
 - if you want to specify the file extension, click Check in documents using this file extension, and enter a file extension of up to 8 characters in the text box.
 - if you want to check in files using the default hcsp extension, ensure that Check in documents using this file extension is selected and the hcsp extension displays in the text box. This is the default file extension used when you check files into the content server.
- 4. Click OK.

Use these instructions to set a file extension at the publication level:

1. After you set staging and publishing options at the project level, right-click the publication in the Publication Hierarchy pane and select **Properties** from the popup window to open the Publication Properties dialog box.

- 2. Select the Publishing Options tab dialog, which only displays if you have set publishing options and/or staging options at the project level.
- 3. Under Pages, click Edit to open the Publishing Options dialog.
- 4. Under File Extensions, do one of the following:
 - if you want to check in files using the extension generated during translation, click
 Check in documents using original file extensions.
 - if you want to specify the file extension, click Check in documents using this file extension, and enter a file extension of up to 8 characters in the text box.
 - if you want to check in files using the default hcsp extension, ensure that Check in documents using this file extension is selected and the hcsp extension displays in the text box. This is the default file extension used when you check files into the content server.
- 5. Click OK.

The file extensions set in staging options should be the same as the extensions set in publishing options.

This option is also available for Directory Items and documents. To set file extensions for either a Directory Item or document, open the appropriate Publishing Options dialog box, which appears after you set project options. Set the extensions following the information described in step 4, above.

Illegal Characters in a Title

When you add a document to a publication, Site Builder uses the document title of the source document in Content Server as the file name in Site Builder. When you translate the publication, Site Builder creates an output file using the same name (adding the extension .htm). The name of the output file that is created during translation is used as the title when you publish and place the output files in the repository.

In Content Server you can create a document title that includes characters that are illegal on the file system. (For example, you can use commas and quotation marks.) Content Publisher handles illegal characters in the document title by replacing them with an underscore (_) when it creates a file name. The file system therefore accepts the output file name that is created during translation and Content Publisher successfully translates the file. As a result, when the output file is published back to the repository, its title is now slightly different to the source document title.

This modification of the source document title to create an output file name occurs only when the title contains illegal characters. The source document title itself is not modified.

Appendix

TROUBLESHOOTING

This section covers the following topics:

- ✤ Log File (page A-1)
- Errors and Warning Messages (page A-8)
- Project Recovery When the Content Server is Unavailable (page A-16)

LOG FILE

This section covers the following topics:

- Logging Options (page A-2)
- ✤ Logging Levels (page A-2)
- Logging Errors (page A-3)
- Viewing the Translation Log File (page A-4)
- Setting Up the Translation Log on Site Builder (page A-5)
- Setting Up the Translation Log File on Site Server (page A-7)
- Setting Up the Server Log File on Site Server (page A-8)

Logging Options

Content Publisher allows you to create two log files to track the translation of a project: the "translation log" and the "server log."

- The translation log is used to identify specific problems (such as missing graphics) that arise during translation. See Setting Up the Translation Log on Site Builder (page A-5).
- The server log is used to monitor server activity and track the translation of multiple tasks. See Setting Up the Server Log File on Site Server (page A-8).

When you use Site Builder as a standalone workstation, you use only the translation log and set the logging level in the Application Options dialog box, from the View menu. You will probably want to save this log file to a local drive.

When Site Builder is used in tandem with Site Server, you set the translation log file in the New Task dialog box in Site Scheduler. You do this for each task (project file), as you schedule it, and will probably want to save this log file to a network drive.



Note: Because logging information set in Site Builder is user-specific for a given machine, and is not saved to the project file, any information set in the Application Options dialog box is irrelevant when a project is passed to Site Server for translation. So whatever is specified in the New Task dialog box will prevail. (If no log file is specified, none will be created.)

The server log file is set in the Site Server dialog box. Like the translation log, the logging options include logging level as well as the path and file name for the file.

Logging Levels

When you create a translation log file or a server log file in Content Publisher, you can choose from the following logging levels:

- ◆ 0 No Logging Site Server won't create a log file.
- 1 Start/Stop and fatal errors The log file will include the start and stop times of the translation and provide a summary of fatal errors, if any, indicating which input files caused the errors.
- 2 Warning errors The log file will list all warnings in addition to start and stop times and fatal errors (each logging level includes the levels below it). It will identify which input files caused the warnings.

- 3 Input files processed The log file will also include a complete list of all input files processed.
- 4 Output files generated The log file will also include a complete list of all output files generated by Site Server, including frames, reference pages, and graphics files. This is the default logging level.
- ✤ 5 Diagnostic/Verbose The log file provides diagnostic reporting.

Logging Errors

If Site Builder generates any fatal errors or warnings during translation, the Translation Warnings/Errors dialog box will appear. You can click the Log File button to open the log file immediately. You should consult Logfile.txt (the default name of the log file), to determine the cause of the error. Unless you have changed the name or the output directory, you should find Logfile.txt in the Content Publisher directory.

A fatal error means Site Builder was unable to translate the source document that caused the error. This could happen, for example, if the source document is corrupted. In that event, Site Builder will move to the next source document to continue the translation. But it won't create an output page for the document that caused the fatal error.

Site Builder may also generate warnings during translation (these are simply logged in the log file). Warnings are less critical. Site Builder will still create an output page for the document, but the translation may not be completely successful. For example, if Site Builder cannot find a graphic during translation, it will produce an output file without the graphic -- and flag the omission with a warning.

Generally, a warning means the translation is not completely successful and that you have to correct the problem that has been flagged. In two instances, however, Site Builder will correct the problem. First, if "promotion" information is missing from the temporary database file, Site Builder will do a full translation to regenerate this information. Second, if links between documents have been broken, Site Builder will fix them (broken links should occur only if the HTML code has been manually edited.)

Whether a fatal error or a warning has occurred, the log file will tell you which input files have caused the problem. For more information on logging levels, see Setting Up the Translation Log on Site Builder (page A-5).

You can also check the Status column in the Contents pane for fatal errors after each translation. A blue exclamation mark (!) will appear opposite any source document that Site Builder could not translate. (Blue exclamation marks that appear temporarily onscreen during translation can be ignored.)

Viewing the Translation Log File

Site Builder generates a log file each time you translate a publication. This translation log summarizes translation details, including errors or warnings that may have occurred during the translation process.

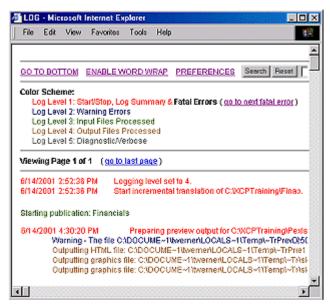
A translation log file is set up by default for each new project in Site Builder. You can, of course, modify your log file settings at any time, such as the logging level, log file location, and log file format (text or HTML).

Log file settings can be found in the Application Options (available from the View menu) or the New Task dialog (when you are using Site Scheduler to schedule projects in Site Server).

HTML Log File

Site Builder includes a friendly alternative to conventional log file formats. With HTML formatting enabled, you can quickly find what you are looking for by using the color-coded system available for this format.

Figure A-1 Sample log file



At the top of the log file, you will find additional links to customize the log file layout.

Go To Bottom/Go To Top — Provides a quick jump to the top or bottom of the log file.

- Enable Word Wrap Provides word wrapping so that you can view your log file in a smaller area.
- Preferences Opens a set of controls that allow you to change the log text attributes for each logging level. This can be especially useful when you are working on a particular task or troubleshooting a specific error message.
- Search/Reset Provides a back/next style of navigation and a global query of the entire log file, regardless of the number of HTML pages. (Site Builder will break up HTML log files at every 1000 lines to reduce the amount of time it takes to open the log file in a browser.)

For more information on the contents of a log file, see Logging Errors (page A-3).

Choose **Log File** from the **View** menu in Site Builder to view your existing log file. Alternatively, you can view the log file from certain error messages, such as the Translation Warnings/Errors dialog box.

The Preferences in the HTML log file rely on the Internet Explorer browser. You can view the log file in Netscape Navigator, but the log file may load slowly.

If you have another browser session open in a second window, the HTML log file will display in that window, regardless of its size. To view the translation log file in its entirety, close all other browser windows before viewing the log file.

Setting Up the Translation Log on Site Builder

The translation log file is a text or HTML file that Site Builder creates by default each time you translate a publication. It summarizes translation details, including any fatal errors or warnings that may have occurred during translation. (See Setting Up the Translation Log File on Site Server on page A-7.)

- 1. From the View menu, choose Application Options to open that dialog box.
- 2. Under Logging, select the level of logging you want from the drop-down list of options. The default is Level 4.

0 - No Logging means that Site Builder won't create a log file. With one of the other five options, Site Builder will create a log file with the degree of detail based on the logging level.

1 - Start/Stop and fatal errors — The log file will include the start and stop times of the translation and provide a summary of fatal errors, if any, indicating which input files caused the errors.

2 - Warning errors — The log file will list all warnings in addition to start and stop times and fatal errors (each logging level includes the levels below it). It will identify which input files caused the warnings.

3 - Input files processed — The log file will also include a complete list of all input files processed.

4 - Output files generated — The log file will also include a complete list of all output files generated by Site Builder, including frames, reference pages, split HTML files, and graphics files.

5 - Diagnostic/Verbose — Provides the maximum amount of logging information.

- 3. Choose **HTML** or **Text** from the Format field. With HTML formatting enabled, you can quickly find what you are looking for using a color-coded logging system. The log file includes a set of preferences for customizing the layout of the log details.
- 4. Click **Reset log file** for each translation if you want Site Builder to create a log file just for the current translation. Clear this check box if you want to create a continuous record of all logging. Site Builder will then add new logging information to the log file each time you translate a publication.
- 5. In the Log File text box, type the path and file name for the log file. (You can change the name of the log file as well as the path.) Alternatively, use the **Browse** button to search for the directory you want to use.

This setting is user-specific on a given machine. It applies to all projects run on the machine by the user logged in at the time of the change.

If Site Builder generates any fatal errors or warnings during translation, the Translation Warnings/Errors dialog box will appear. You can click the Log File button to open the log file immediately. A fatal error (for example, because of a corrupt source document) will result in a source document not being translated. A warning (which could result from a missing graphic) means that the translation has not been completely successful.

You can view the log file at any time by clicking Log File on the View menu. Site Builder will open the log file created during your last translation.

Setting Up the Translation Log File on Site Server

The translation log is a text or HTML file that Site Server creates each time you translate a project. It summarizes translation details, including any errors or warnings that may have occurred during translation. (See Setting Up the Translation Log File on Site Server on page A-7.)

Any logging options you may have set in the Application Options dialog box in Site Builder are application-specific and won't be saved to the project file. When scheduling a project for translation by Site Server, you must set logging information in the New Task (or Edit Task) dialog box.

Follow these instructions to set up a translation log file:

- 1. With a project selected in the Site Scheduler window, click **Edit Task** (**N**) on the toolbar or choose **Edit** from the Task menu to open the Edit Task dialog box.
- 2. In the Log File text box, type the path and file name for the log file for this project. Alternatively, use the **Browse** button to locate the directory you want to use.
- 3. Select the level of logging from the drop-down list of options. The default level is 4. (See Logging Levels on page A-2 for more information.)
- 4. Click **Clear log file** if you want Site Server to create a log file just for the current translation. Clear this check box if you want Site Server to create a continuous record of all logging. Site Server will then append new logging information to the log file each time it translates a project.
- 5. Choose **HTML** or **Text** from the Format field. With HTML formatting enabled, you can quickly find what you are looking for using a color-coded logging system. The log file includes a set of preferences for customizing the layout of the log details.

The default translation log file name is Logfile.txt, and the default directory is:

C:\Documents and Settings\<username>\My Documents\Stellent

If you decide to capture information for successive translations in the same file, you will probably want to periodically "reset" the log file, because otherwise you will end up with a very large file.

You can attach the log file to an email notification for a task. The email is automatically generated to confirm how successfully the task has been translated, staged, or published. See Sending an E-Mail Notification for a Task (page 8-35) for more information.

Setting Up the Server Log File on Site Server

The server log is a text file that Site Server creates each time you translate a project. It is used to monitor server activity and track the translation of multiple tasks.

You specify a server log file in the Site Server dialog box.

- 1. To open the Site Server Options dialog, do one of the following, depending on your setup:
 - From the Start menu in Windows, choose Settings, and then Control Panel. In the Control Panel window, double-click the Site Server icon, or
 - Right-click the Site Server icon on the Windows taskbar, and choose Properties from the popup menu.
- 2. In the Site Server dialog box, under Logging, enter the path and name of the log file you want to use in the Server Log File text box.
- 3. Under Logging Level, select a logging level from the drop-down list of options. (See Logging Levels on page A-2 for more information.)
- 4. Click OK.
- The default server log file name is Serverlog.txt, and the default directory is: C:\Documents and Settings\<username>\My Documents\Stellent

ERRORS AND WARNING MESSAGES

Content Publisher requires that certain tasks be completed in a particular order for successful translation, staging, and publishing to occur; otherwise, you may encounter a number of error messages or warnings.

This section summarizes the most common messages generated by Content Publisher and Content Server along with the appropriate steps to resolve and prevent the error from happening in the future.

- Error: The Stellent Gateway Local Server could not be instantiated (page A-9)
- Error: The following conflicts were noted prior to translation (page A-10)
- Error: The following document could not be prepared for previewing (page A-10)
- Error: The following document is in an unsupported format (page A-11)
- Error: The project cannot be read (page A-11)
- Error: This project cannot be opened (page A-11)

- Error: This template cannot be imported (page A-12)
- Error: Warnings and/or Errors occurred (page A-12)
- Warning: Content Server is currently unavailable (page A-12)
- Warning: A valid file specification has not been entered (page A-13)
- ✤ Warning: The path specified is invalid or does not exist (page A-13)
- Warning: The project file was not properly saved during a prior session (page A-13)
- Warning: You have imported a manually formatted document into a template (page A-14)
- ♦ Warning: You have imported a styled document into a template (page A-14)
- Warning: You must translate the publication at least once prior to preview (page A-15)
- ✤ Warning: Confirm your current staging options (page A-15)
- Warning: Confirm your current publishing options (page A-16)

Error: The Stellent Gateway Local Server could not be instantiated

Serverlog.txt: <IAStellent> Attempting to connect to Content Server 'intradocdev' at CGI URL 'http://address here/'. The Stellent Gateway Local Server could not be instantiated. Ensure that IAStellentCommLink.exe is available and properly registered. Unable to connect to library 'intradocdev'

- Details: Site Server cannot connect to Content Server because the IAStellentCommLink component has not been instantiated, or accessed. This issue was resolved in Stellent Content Publisher 5.1.
- Resolution: You can correct this by setting the application access permissions for the IAStellentCommLink component (using the DCOM Configuration).

Error: The following conflicts were noted prior to translation

File Conflicts Notice: The following conflicts were noted prior to translation. Press OK to continue with the translation or Cancel to stop the translation.

- Details: One or more output files will overwrite existing files in the output directory—each file originating from a different source. This is especially common when working with Content Server. This message should not be taken lightly; one of the alike file names will be overwritten!
- Resolution: If you don't mind overwriting the files specified, click OK; otherwise, click Cancel and perform one of the following tasks:
 - * Rename the specified file or files in your publication to prevent overwriting.
 - ♦ Move the specified output files to another, distinct directory.
 - ✤ Change your output directory for the current publication.
- ✤ More information: File Conflicts Notice (page 5-103).

Error: The following document could not be prepared for previewing

Preview Fail: The following document could not be prepared for previewing. Please refer to the log file for further information.

- Details: Preview failure often results from a much larger issue, such as a missing or damaged source document. (The source document may have changed, could be corrupt, or possibly unsupported by Content Publisher.)
- Resolution: To resolve a preview failure, set your logging to 5, perform a full translation, and check your log file for translation problems.
- ✤ More information: Preview Fail (page 7-5).

Error: The following document is in an unsupported format

Import Failure: The following document is in an unsupported format: Any styles and/or patterns in this document will not be added to the template. Would you like to continue?

- Details: The document you are importing falls outside of the supported Site Builder formats (word processing, spreadsheet, presentation files, etc.).
- Resolution: Verify the document you are importing is listed as a compatible format in the below topic.
- ♦ More information: File Formats and Translation (page 5-44).

Error: The project cannot be read

Site Builder: The Project cannot be read. Please check that you selected a Content Publisher project.

- Details: Content Publisher must recognize a project file (version 3.0 or later) in order to open, manage, and publish with it.
- Resolution: Verify that the file you are opening is a supported version and that other projects can be opened with your copy of Site Builder.
- More information: About Projects (page 4-2).

Error: This project cannot be opened

Site Builder: This project cannot be opened because it contains items from a repository that is not currently available.

- Details: Your workstation does not have access to the repository containing source documents, graphics, or associated files for this project.
- Resolution: Verify that your Site Builder has access to the necessary repositories— FTP, HTTP, or Content Server. It may be necessary to reinstall Content Publisher to restore the repository components (DLLs).
- ✤ More information: Selecting a Repository (page 5-8).

Error: This template cannot be imported

Site Builder: This template cannot be imported. Please ensure that you select a valid template file.

- Details: Templates with the .ttp extension are recognized by Site Builder as valid template files.
- Resolution: Verify that you are importing a template and not a source document, graphic, or other unsupported format.
- ✤ More information: Importing a Template (page 6-13).

Error: Warnings and/or Errors occurred

Warnings/Errors: Warnings and/or Errors occurred. Please refer to the log file for further information.

- Details: Problems occurred during translation. An output page is created, but the translation may not have been successful.
- Resolution: Click the Log File button to open the log file and determine which input file may have caused the problem. You may need to set your logging level to 5.
- More information: Logging Errors (page A-3).

Warning: Content Server is currently unavailable

Content Publisher: The project file could not be saved to Content Server. Content Publisher has saved a backup copy of the project. You will be able to recover the project once communication with the Content Server has been re-established.

- Description: Your workstation cannot communicate with Content Server for some reason. Your project file and history file have been saved to your hard drive, where you will be able to recover them later.
- Resolution: Do not try to open the recoverable version on your hard drive. Wait until Content Server is available once again, and then open your project in the usual way from the content server. Content Publisher will retrieve the recoverable project file from your hard drive.
- More information: Project Recovery When the Content Server is Unavailable (page A-16).

Warning: A valid file specification has not been entered

Hierarchy Import: The pass through option has been enabled, but a valid file specification has not been entered. Do you want to continue?

- Details: When pass-through conversion is selected, source documents are passed through to the output folder in their original format. This assumes the file format is web viewable or can be viewed on your visitors' machines.
- Resolution: When using this option, it is highly recommended that you specify which file formats, in the form of a wildcard (*.doc;*.txt), to pass-through; otherwise, you run the risk of converting file formats that cannot be viewed in your web publication.
- More information: Passing Through Source Documents Without Conversion (page 5-38).

Warning: The path specified is invalid or does not exist

Path Fixup: The path specified is invalid or does not exist. Do you want to use this path anyway?

- Details: Site Builder cannot find a file or directory while opening a project and in turn, creates an artificial location.
- Resolution: Choose Yes to accept the new directory and repair the missing files or directories at a later time, or choose No to resolve this problem now.
- **More information:** Replacing a File or Directory (page 4-20).

Warning: The project file was not properly saved during a prior session

Content Publisher: The project file titled <title> was not properly saved to Content Server during a prior session. Content Publisher automatically created a backup copy of the project file dated <date>. Do you want to recover this project? If you want to recover the project, click Yes. If you want to open the version from the content server, click No.

If you want to open the recoverable version from your hard drive, click **OK**. If you want to open the selected version from the content server, click **No**.

- Description: Since communication with Content Server has been re-established, you can now open the recoverable version of the project file from your hard drive.
- Resolution: Click OK and Content Publisher will retrieve the recoverable version from your hard drive. Then click Save to save the recoverable version to your content server.
- More information: Project Recovery When the Content Server is Unavailable (page A-16).

Warning: You have imported a manually formatted document into a template

Import Conflict: You have imported a manually formatted document into a template which formerly contained style-based elements. You can choose OK to continue, Cancel to stop this process, or Help for more information.

- Details: Patterns take precedence over styles. When the two are combined, a conflict arises and the formatting associated with a particular style may be overridden by a pattern.
- Resolution: Click OK to continue importing the document and then resolve the conflict at a later time or click Cancel to stop the process and resolve the conflict using one of the following methods:
 - Remap a pattern or a style to another element (if you know where the potential conflict will occur).
 - Create two identical templates and use one only for styled documents and the other for manually formatted documents.
- More information: Resolving Import Conflicts Between Styles and Patterns (page 6-92).

Warning: You have imported a styled document into a template

Import Conflict: You have imported a styled document into a template which formerly contained pattern-based elements. You can choose OK to continue, Cancel to stop this process, or Help for more information.

- Details: Patterns take precedence over styles. When the two are combined, a conflict arises and the formatting associated with a particular style may be overridden by a pattern.
- Resolution: Click OK to continue importing the document and then resolve the conflict at a later time or click Cancel to stop the process and resolve the conflict using one of the following methods:
 - Remap a pattern or a style to another element (if you know where the potential conflict will occur).
 - Create two identical templates and use one only for styled documents and the other for manually formatted documents.
- More information: Resolving Import Conflicts Between Styles and Patterns (page 6-92).

Warning: You must translate the publication at least once prior to preview

Site Builder: You must translate the publication at least once before you can preview a reference document.

- Details: A reference document must be populated with linked documents before it can exist as a reference page or be previewed as a reference page. This is one of the many roles of a publication translation.
- Resolution: To preview a reference document, first translate your publication, thus populating the document with content.
- More information: Using the Edit Template Dialog Box (page 6-7).

Warning: Confirm your current staging options

Confirm Staging Options: Your current staging settings are: Repository: Output locations for: Pages: Graphics: Gallery graphics: Please note that this will be an incremental staging operation. If these settings are not correct then select Cancel and change the settings in the 'Staging Options' dialog box (available from the Run menu).

Details: This confirmation dialog box opens each time you Stage a project (assuming you have set staging options) and gives you a chance to change your staging settings.

- Resolution: Click OK to accept the staging options and continue publishing to the staging server or Cancel to return to the Staging Options dialog box, where you can specify different options.
- **More information:** Confirming Staging Options (page 8-3).

Warning: Confirm your current publishing options

Confirm Publish Options: Your current publishing settings are: Repository[name of repository]; Output locations for [paths and directories for Pages, Graphics, Gallery graphics]; Please note that this will be an incremental publish operation. If these settings are not correct, then select Cancel and change the settings in the 'Publish Options' dialog box (available from the Run menu).

- Details: This confirmation dialog box opens each time you Publish a project (assuming you have set publishing options) and gives you a chance to change your publishing settings.
- Resolution: Click OK to accept the publishing options and continue publishing to the repository or Cancel to return to the Publishing Options dialog box, where you can specify different options.
- More information: Confirming Publishing Options (page 8-21).

PROJECT RECOVERY WHEN THE CONTENT SERVER IS UNAVAILABLE

If Content Server is unavailable when you try to save a project, Content Publisher will automatically save the project to a special folder on your hard drive. You will be able to recover the project file once communication with the content server has been reestablished.

When you open a project from Content Server, Content Publisher tracks the project by means of Project Recovery Manifest.hda, which resides in the Project Recovery folder in your Content Publisher directory. (Both the file and folder are created the first time you communicate with Content Server to save a new project or to check out an existing one.)

When you are running a project in Content Publisher, you may find that you cannot save the project to Content Publisher. For example, the content server may have been turned off, there may be a connection problem, or you may have run out of disk space. In that event, Content Publisher will automatically save the project file (and the history file) to the Project Recovery folder. It will confirm this with an onscreen message.

Once Content Server is available again, you should open your project from Content Server in the usual way.

- 1. In Content Server, click the appropriate **Select** button on the Select a Project page to open the latest version of the project.
- 2. A message appears, to alert you that a recoverable version of the project is available on your hard drive. Click **OK**.
- 3. A second message may ask whether you want to undo the checkout of the project from the content server. Click **OK**.

This message will appear only if the project is still checked out. (Conceivably, you or someone else may have undone the checkout in the content server after the project was saved to your hard drive.)

4. When the recovered project opens in Content Publisher, click **Save** on the File menu to save the recoverable version to the content server immediately.

Follow these instructions to use a version other than the recoverable project file:

If you don't want to use the recoverable version of a project, you can use the latest version in the content server (or an earlier one), instead.

- 1. In Content Server, select the appropriate **Select** button on the Select a Project page to open the particular version of the project you prefer to use.
- 2. If you select the latest version, the message alerting you that a recoverable version is available will appear. Click **No**. A second message may ask you whether you want to undo the checkout of the project from the content server. Click **OK**.
- 3. If you have selected an earlier version of the project file, it will open immediately in Site Builder.

In either case, the recoverable version on your hard drive will be automatically deleted.

If you are scheduling projects on Site Server, a default setting ensures that the project is automatically saved to the Project Recovery folder on the Server machine (the log file will flag this event). The next time you run the task, Site Server will automatically retrieve the recoverable version of the project file from your hard drive and run that version. It will also save that recovered version back to the content server.

If you don't want Site Server to save project files in this way, you should clear the Allow recovery of project files where possible check box on the Options tab dialog of the Site

Server Properties dialog box. (Depending on your setup, you can open this dialog box either from the Control Panel or by right-clicking the Site Server icon on the taskbar.)

You shouldn't try to open the project directly from the Project Recovery folder, unless your content server is permanently unavailable. In that event, however, you will have to recreate your project, because your source documents will no longer be available (assuming these were in the same content server as your project file).

Appendix B

OFFICE 2007 LIMITATIONS

This section provides a number of limitations related to conversion of Office 2007 files:

- All Office Applications (page B-1)
- ✤ Word 2007 (page B-2)
- ◆ Excel 2007 (page B-3)
- PowerPoint 2007 (page B-3)
- Examples of Unsupported Objects (page B-4)

ALL OFFICE APPLICATIONS

Please note the following conversion limitations that currently apply for all Office 2007 applications:

- Smart art (see Examples of Unsupported Objects on page B-4 for an example)
- VB controls and macros (see Examples of Unsupported Objects on page B-4 for an example)
- ✤ Table cell formatting
- Word art (see Examples of Unsupported Objects on page B-4 for an example)
- Vector graphics (Office art & VML) transparency, picture styles, effects, etc. (see Examples of Unsupported Objects on page B-4 for an example)
- Password-protected documents

Word 2007

Please note the following conversion limitations that currently apply for Word 2007 documents:

- Picture bullets
- ✤ Tint support
- Table styles (see Examples of Unsupported Objects on page B-4 for an example)
 - Different column and row definitions (even/odd, etc.)
 - Different header row and column definitions
- List level overrides
- ✤ Alternate text
- ✤ OLE objects
- Equations (see Examples of Unsupported Objects on page B-4 for an example)
- Theme effects (in Office art)
- Line numbers
- ✤ Watermarks
- Page color (not supported in the viewer)
- Footnote and end note reference numbers
- Revision delete attributes (text is supported)
- Controls (only last edited text is output for legacy controls)
- Custom XML (structure, schemas, expansion packs), cfChunk/altChunks are not supported

EXCEL 2007

Please note the following conversion limitations that currently apply for Excel 2007 spreadsheets:

- Conditional formatting (highlight cells with rules, top bottom rules, data bars, color scale icon sets, and custom rules; see Examples of Unsupported Objects on page B-4 for an example).
- Formatting as tables (the data in the cell is output, but the formatting is not retained)
- Headers and footers (different even/odd page headers are not supported)
- Protected workbooks

POWERPOINT 2007

Please note the following conversion limitations that currently apply for PowerPoint 2007 presentations:

- Table formatting (similar to Excel)
- Actions are currently not supported
- "Objects" (this is represented as VML; currently not supported)
- Movies/sounds are not supported
- Complex gradients are not supported (see Examples of Unsupported Objects on page B-4 for an example)
- ✤ Animation is currently not supported
- Only solid fills are supported for text
- Only left-to-right text direction is supported (not related to bidi)
- Shading and fills of certain shapes are not supported (see Examples of Unsupported Objects on page B-4 for an example)
- Transparency of lines/vector objects is not supported

EXAMPLES OF UNSUPPORTED OBJECTS

This section provides some examples of Office 2007 objects that cannot be converted at this point.

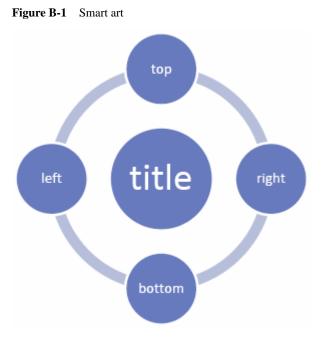


Figure B-2 Table styles

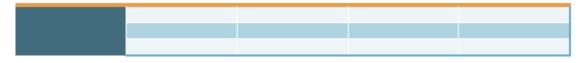


Figure B-3 Picture styles/effects



Figure B-4 Word art



Figure B-5 Equations

Equations and symbols:

∑losers = Cubs

Figure B-6 Controls

Date picker: 9/22/2006 (this date is in a date picker control)

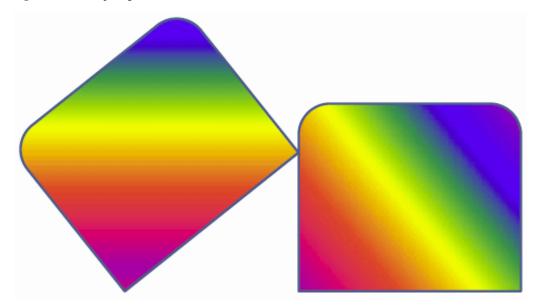
1	1	3 1
2	2	3 2
3	3	3
4	4	😳 4
5	5	S
6	6	6
7	7	9 7
8	8	98
9	9	9
10	10	10

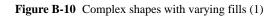
Figure B-7 Data bars with conditional formatting, color scales, and icon sets

Figure B-8 3D effects in PowerPoint



Figure B-9 Complex gradients





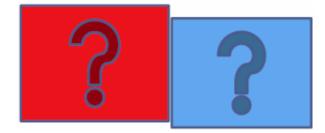
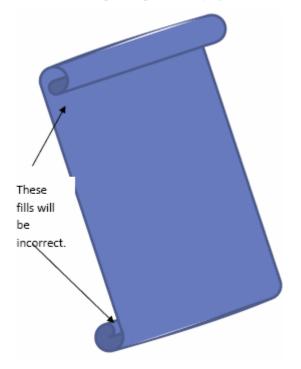


Figure B-11 Complex shapes with varying fills (2)



Appendix

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C-3

ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library version 1.2.3, July 18th, 2005

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Glossary

GLOSSARY

absolute URL

The full Internet address of a Web page. It consists of the transfer protocol, network location, and optional path and file name. For example:

http://www.stellent.com/news/update.htm, where 'http' defines the transfer protocol, 'www.stellent.com' identifies the server where the document resides, 'news' is a subdirectory, and 'update.htm' is the file name.

active link

The currently selected link on a Web page. Web browsers often display links in a different color when clicked—and change the color again, once the reader has visited the site or page the link points to.

Active Server Pages

A Microsoft scripting language capable of performing server side functions with Microsoft Internet Information Server (IIS). ASP (and more recently ASP+) can be used to build dynamically assembled Web pages that draw information (using queries) from a relational database. ASP pages contain the .asp file extension.

ActiveX control

A component that can be embedded in a Web page to provide functionality not directly available in HTML, such as animation sequences and spreadsheet calculations. ActiveX controls can be activated in a number of programming languages.

Address (System)

A special element that is part of every template in Site Builder. Used to format an address in a Web page, that is, the information entered under Address Lines in the Address tab dialog of the Globals property sheet.

administrator

A person or computer login that has maximum privileges over the computer or network. Administrative access includes the ability to use every feature of the system and assign unique privileges to other users.

anchor

A named location on a Web page that serves as the target of another hyperlink. Anchor tags allow you to link to a specific section of a Web page. In a URL, an anchor is preceded by the pound (#) sign. Anchors are also called bookmarks.

applet

Short for Java applet, a short program written in Java that is embedded in a Web page and executed by a Web browser. Java applets are frequently used to add interactivity or application functions to a Web page. Java applets can be read by Microsoft Internet Explorer, Netscape Navigator, or any Web browser capable of interpreting Java.

ASCII

American Standard Code for Information Interchange. A universally recognized text-only format that contains characters, spaces, punctuation, etc., but no formatting information. You can transfer ASCII files between programs that could not otherwise understand each other's documents. HTML files can be encoded in ASCII format.

background color

The color setting of a Web page or table cell.

background graphic

The graphic used instead of a color for the background of a Web page. Each graphics set in Site Builder includes a background graphic that is automatically applied to all Web pages created from the template the graphics set has been applied to.

base URL

An optional URL that you can assign to a Web page to convert relative URLs on the page to absolute URLs. A base URL should end with a document name, such as

http://www.stellent.com/news.htm, or a trailing slash, such as http://www.stellent.com/news/. A base URL is also called a base location.

bitmap (.bmp)

A Windows-compatible graphics file format in which the image is represented by a series of bits. Site Builder converts numerous image types, including bitmaps, in source documents into the GIF, JPEG, PNG, WBMP, or BMP format.

body page

What a source document becomes when translated by Site Builder. Translated output consists mostly of body pages, but Site Builder can also create reference pages to navigate the body pages.

bookmark

1) A means to store a Web site or other Internet URL for future use. Instead of entering the URL each time a user wants to visit a site, the user can open the URL once, 'bookmark' the URL, then use the bookmark to make subsequent visits. Bookmarks are also called 'Favorites.'

2) A named location on a Web page that serves as the target of another hyperlink. Bookmarks allow you to link to a specific section of a Web page. In a URL, a bookmark is preceded by the pound (#) sign. Bookmarks are also called anchors.

broken hyperlink

A hyperlink that points to a URL or file that does not exist (or one that cannot be found by the computer).

bulleted list

A series of related items in paragraphs set off by bullets. Also known as an unordered list.

cell

The smallest component of a table.

cell padding

The amount of space between the content and border of a table cell.

cell spacing

The amount of space between cells in a table.

character

A single alphabetic letter, numeric digit, or special symbol such as a decimal point or comma.

character element

An element used to format only characters, that is, a portion of text in a paragraph.

client

On a network or the Internet, a program that requests files or services from another computer with shared resources (usually a server).

content server

Any Content Server. In the context of the publishing process within Content Publisher, a content server may be a source server (where source documents reside), a staging server (where a project is staged for review purposes), or a publishing server (the final Web site).

Contents pane

One of two panes in the main window of Site Builder where project setup takes place. Displays output pages, the paths and names of source documents, and the template associated with each document. The Publication Hierarchy pane displays the publication hierarchy.

core HTML tags

The most commonly used HTML tags: six heading tags, the paragraph tag for all text, and two tags for handling lists.

Cascading Style Sheets (CSS)

A means of separating structure from presentation so as to introduce layout control over Web pages. Style sheets can be included in an HTML document by (a) linking to an outside style sheet, (b) embedding a document-wide style in the <HEAD> tag of the document, or (c) embedding inline styles where needed. Site Builder implements CSS both the second and third way. (Outside style sheets can be added by using the 'Include HTML or scripting code before content' option.)

Custom Table Layout

An option in the Layout dialog box of Site Builder. Users can create a custom HTML table layout using a third party editor (Microsoft FrontPage, Macromedia Dreamweaver, Adobe GoLive, etc.) and then apply that layout to a publication using this feature. Tokens are

used to statically or dynamically include reference pages, body pages, or template components in a custom table layout.

default

A choice made by an application unless the user specifies otherwise. Applications have default settings built into them for certain values or options that are required for the program to function. For example, in Site Builder the default extension for output body pages is .htm.

Default Character

A special element that can be associated with any character in a source document that is not associated with a specific style.

Default Paragraph

A special element that Site Builder assigns to content in a source document that is not associated with any other element.

Default.tcp

One of two default project files in Site Builder. A copy of the project file opens automatically when you start a new HTML project. The project file is installed in the Content Publisher directory (a copy is also available in the Support folder of the Content Publisher product disc). A second default project file, DefaultWML.tcp, is used to create WML projects.

DefaultWML.tcp

One of two default project files that is installed in the Content Publisher directory (and is also available on the Content Publisher product disc). Site Builder opens a copy of DefaultWML.tcp each time you start a new WML project. DefaultWML.tcp is used to create WML projects. You use Default.tcp to create HTML projects.

dialog box

A window containing command buttons and options that allow you to carry out a particular task. In Site Builder, reserved for secondary windows that are accessible directly from commands in menus, tab dialogs, and other dialog boxes.

directory

The name of a storage area on a computer's disk drive that contains a collection of files, other directories, or both. The directory name should identify its contents. In the Windows

operating system, a directory is represented by a yellow icon that resembles a manila folder. Directories are also called folders.

Directory Item

A directory or folder that you have added to a project in Site Builder so that source documents placed in the directory at any time become part of the project. (The Update Versions command must be run in order to recognize new documents added to the directory.)

document

A computer file that contains information, usually text. In Site Builder, documents are added to a publication for translation. Each document translated in Site Builder becomes a Web page for viewing in a Web browser (or multiple Web pages if the document is split). Also known as source document.

document management system

A system of electronic files grouped by libraries and folders in a repository. The document management system controls access to the files and tracks the history of each file.

domain name

A name that resolves or points to an IP address. Domain names give a 'friendly name' to a Web site, making it easy for users to find the Web site on the World Wide Web.

download

To transfer a file from a remote computer to a local machine.

dual publishing

A feature in Content Publisher that allows you to preview a Web site before going "live" with the Web site. The dual publishing feature can be found in the Staging/Publishing Options of Site Builder, where you can designate a staging server (a preview Web site) and a publishing server (the final Web site). Typically, you will first stage your project for others to review and then publish your project to the final Web site.

dynamic Directory Item

An extension of a Directory Item, whereby Site Builder incorporates not only the identified folder (directory) but all of the folders below that folder in the system hierarchy. When the directory is in Content Server, the contents of the directory are defined by search criteria.

effect

A characteristic of a portion of text in a document, such as bold, italic, or subscript. Site Builder lets you retain or change such effects when you translate source documents.

element

Similar to a style name used in a word-processing template. When Site Builder imports styles or patterns in a source document, it automatically associates an element with each style or pattern to facilitate the translation of the source document. An HTML tag is assigned to each element, and the elements are saved in the template. Also known as an element.

element button bar

A navigation aid consisting of buttons with labels such as "Previous" and "Next" to denote their purpose. Used to move between elements within Web pages.

element link

A link at the element level that allows readers to jump between content associated with a specific element in a Web publication.

Element Setup

A property sheet in Site Builder in which you manage the elements generated when you import styles or patterns from a source document or use the ranks that Content Publisher assigns by default.

element text bar

A navigation aid consisting of text drawn from elements. Used to move between elements within Web pages.

email

Electronic mail. The transmission of messages electronically over a network.

Email (System)

A special element that is part of every template in Site Builder. Used to format an email address in a Web page, that is, the information entered in the Email Prompt text box in the Address tab dialog of the **Globals** property sheet.

embedded files

A graphic, sound, or object included in a document (such as a Microsoft Word document). Site Builder converts embedded objects into graphics and also creates a link to the object in its native format (such as .xls for Microsoft Excel documents).

Favorites

To store a Web site or other Internet URL for future use. Instead of entering the URL each time a user wants to visit a site, the user can open the URL once, save the URL as a 'Favorite,' then use the Favorite to make subsequent visits. Favorites are also called 'Bookmarks.'

file

A named collection of information that is stored in a file system or repository.

file extension

The part of a file name that identifies the purpose or use of the file. File extensions determine file type. As a result, software applications are able to read the file as necessary. For example, files with the .txt extension can be opened with a text editor; files with the .bmp extension can be opened with a graphics editor; and files with the .exe extension can be run by the operating system.

file server

A computer running on a network that stores files and provides local and remote access to them. File servers are also called Web servers.

file type

The format of a file, usually indicated by its file name extension. Most software applications work with a specific set of file types.

folder

The name of a storage area on a computer's disk drive that contains a collection of files, other folders, or both. The folder name should identify its contents. In the Windows operating system, a folder is represented by a yellow icon that resembles a manila folder. Folders are also called directories.

font

Set of characters of a particular design and size. A typeface is composed of fonts. Arial is a typeface; Arial 12 point roman bold is a font.

form

A set of fields used for data input and placed on a Web page. The submitted data is processed on a Web server, and the results are posted to a file, email address, or database. In Content Server, forms are created with HTML and Idoc Script and given the .hcsf file extension (the results are posted to a template file with the .hcsp file extension).

Formatting

A property sheet in Site Builder in which you format the content of your Web pages.

frame

A partition within the Web browser window that allows readers to view content. When used with other frames as part of a frameset, other Web pages can be viewed simultaneously. In Site Builder you set frames in the Layout dialog box.

frameset

A set of named scrollable windows that can be dedicated to separate Web pages. In Site Builder you can create a frameset for each publication in your project. You can save framesets in the Framesets Gallery for use on other projects.

Frameset Layout

An option in the Layout dialog box of Site Builder (the other option is HTML table layout). With Frameset Layout, you create a set of frames that help you organize content for viewing in a Web browser. Each frame may contain a reference page, a body page, or another component.

FTP

File Transfer Protocol. An Internet protocol used to transfer files between servers on a network or the Internet. Most Web sites are created and maintained by using an FTP client.

Gallery

1) A dialog box in Site Builder that offers over 900 graphics that serve as navigation and visual aids to fine-tune the appearance of Web pages. Many of the graphics are organized in 28 Sets, which ensure that the buttons, bullets, separators, and background in your Web publication are all of a consistent design.

2) The folder in the Content Publisher directory that contains these graphics in GIF format.

3) A dialog box in Site Builder used to access different framesets or HTML tables created in the Layout dialog box.

GIF (.gif)

Graphics Interchange Format, a compressed graphics file that handles eight-bit color (256 colors) and achieves a compression ratio of roughly 2:1. GIF images are a popular graphic file format on the Internet because of the reduced download time. GIFs are one of the default formats that Site Builder uses to convert graphics imported in source documents. Any GIFs linked to source documents are "passed through" by Site Builder during conversion.

global setting

Any option in Site Builder set in the Globals property sheet. Associated with a specific template rather than an individual element within the template.

Globals

A property sheet in Site Builder where you format the template as a whole, as opposed to its individual elements. For example, you can create a background color for all documents associated with that template, and this color will be used for all Web pages created when those documents are translated.

graphic

A particular type of file that typically displays an image rather than text. Site Builder accepts graphics in a variety of formats when it translates source documents into Web pages. It converts them into the GIF, JPEG, PNG, BMP, or WBMP format. Site Builder also includes a Gallery of graphics for use as navigation and visual aids in Web publications.

GUI

Graphical user interface, a graphics-based user interface that incorporates icons and pulldown menus and allows users to use a mouse to execute commands. GUIs create visually oriented interfaces that make it easy for users to interact with computerized information of all kinds.

HCSP

Hyper Content Server Page. An HCSP page is a dynamic Web page containing HTML and Idoc Script and is stored in Content Server. The Idoc Script syntax is comprised of the following tags: <!--\$code--> (where code represents an Idoc Script command). HCSP pages are indexed by the Verity search engine to provide users with efficient search results. HCSP pages contain the .hcsp file extension.

HCST

Hyper Content Server Template. An HCST page is a dynamic Web page containing HTML and Idoc Script and is stored in Content Server. The Idoc Script syntax comprises the following tags: <\$code\$> (where code represents an Idoc Script command). HCST pages are template files and as such, are not indexed by the Verity search engine. HCST pages contain the .hcst file extension.

header

The initial portion of an HTML file between the <HEAD> and </HEAD> tags where titles are commonly supplied.

heading

A text style that displays in a larger typeface than the default or normal text. Headings denote hierarchy in a document. A Heading 1 is generally the largest, a Heading 2 the next largest, and so forth. A Heading tag in HTML denotes the same hierarchy.

heading level

A level in the hierarchy of a document. Heading levels help structure content. Documents often contain several heading levels with style names such as Heading 1 and Heading 2. Each heading would be set in a different font size or weight to denote its level of importance.

helper

A program launched or used by a Web browser to process files that the browser itself cannot handle. For example, a helper application may be needed to view JPEG images or play sound files.

hierarchical structure

The manner in which a Web publication or page is created. In Site Builder you use a publication hierarchy consisting of a root publication and any subpublications to denote the top-level hierarchical structure of the Web publication (the complete publication hierarchy contains the source documents and reference pages added to each publication in the hierarchy). The hierarchical structure of a Web page is determined by the heading levels used.

home page

The opening, introductory page of a Web site, whether on an intranet or the Internet, which is retrieved and displayed by default when a user visits that site. A home page usually provides an introduction to the Web site along with hypertext links to local resources. The home page is often named index.htm, default.htm, or home.htm. Since Site Builder uses Index.htm as the default for any Index you create for a publication, you might want to rename this file to match the configuration of your Web server.

hotspot

A portion of text or an image that contains a hyperlink. Clicking the hotspot takes the user to related information. In Web browsers, hotspots are invisible. Users can tell that a hotspot is present by the changing appearance of the pointer.

HTM

The default extension for output HTML files created in Site Builder.

HTML

HyperText Markup Language. The markup language used to turn a document into a Web page that can be viewed in a Web browser. HTML tags are used to format the text and the background of the document. HTML pages contain the .html or .htm file extension.

HTML 4.0

The current standard administered by the W3C (more specifically, version 4.01). Most Web browsers will support version 4.0 and 4.01.

HTML file

What Site Builder produces when it translates a source document or reference page. Each HTML file displays as a Web page in a Web browser. (If a source document is split into several HTML files, each file displays as a single Web page.)

HTML format

The format used to view documents in a Web browser. Files in HTML format are text files with HTML tags assigned to blocks of text. Site Builder turns source documents into body and reference pages that are in HTML format.

HTML tags

A collection of symbols that specify the appearance and properties of a document. Web browsers interpret HTML tags and display the contents in the browser window.

HTTP

The protocol used by Web browsers and Web servers to communicate over the Internet. More specifically, a Web browser requests a document from a Web server and displays its contents using HTTP. The HTTP protocol appears at the beginning of a URL (for example, http://). The HTTP specification is maintained by the World Wide Web Consortium.

HTTPS

HTTPS is standard HTTP exchanged over an SSL-encrypted session.

hyperlink

A jump from a piece of text or image in one document to another document located within the Web publication, the file system, a network, or the Internet. Site Builder creates hyperlinks automatically for navigation purposes. Site Builder also preserves hyperlinks in source documents that can take the user, for example, to another Web site. Hyperlinks are the primary means of navigating on the World Wide Web. Hyperlinks are also called links.

hypertext

A nonlinear way to organize information, especially text. Hypertext provides a way to adapt text, graphics, and other kinds of data for computer use so that individual data elements point to one another. Any document that contains hypertext links to other documents is a hypertext document. Most Web pages are hypertext documents.

hypertext link

A hotspot overlaid on a graphic or piece of text. Facilitates navigation within and between Web publications according to users' interests. When readers click the hypertext link, they're taken to another part of the Web page or Web publication.

Idoc Script

A scripting language used to create dynamic Web pages in Content Server. Idoc Script provides the ability to reference variables, conditionally include content in HTML pages, loop over results returned from queries, and more. Idoc Script is primarily used to present HTML templates. Idoc Script pages may contain a number of different file extensions (usually .idoc, .hcsp, or .hcst) depending on its use.

image

A graphic in GIF, JPEG, PNG, BMP, or WBMP format that can be inserted into a Web page. Site Builder lets you import graphics in a variety of formats and convert them into one of these five formats.

Image tag

The HTML image tag for placing graphics in-line in Web pages. Used with Web browsers that support HTML 2.0 and later versions.

imported style

A style name imported from a source document and associated with a element.

incremental translation

An option whereby Site Builder translates only those source documents in a publication that have changed since the last translation. Particularly useful when you're revising only one or two source documents in a large publication. The incremental translation command is available from the Run menu, Run toolbar, and large toolbar.

Index

An optional reference page you can build in Site Builder when you convert source documents into Web pages. This alphabetical list is based on index entries embedded in the source documents. Site Builder creates a separate Web page for the Index and automatically links each entry in the Index to the appropriate Web page for the source document containing that entry. Also known as key word index.

Index Entry

A special element that Site Builder automatically associates with text tagged with an index marker in a source document. Site Builder compiles all the content associated with this special element to generate a key word index. You can format the Index Entry as you would any other element. Site Builder also uses the Index SubEntry element where you have created an index with second-level entries.

Index Heading

A special element. Site Builder automatically associates index entries embedded in the source documents with another special element named Index Entry to generate a key word index. At the same time, it creates alphabetical headings (A, B, C, etc.) for the index and associates these headings with Index Heading. You can format the Index Heading as you would any other element.

inline image

An image embedded in a line of text rather than its own window. Can appear by itself or merged with displayed text.

inline style

A method of applying cascading style sheet settings to items in a document. Inline styles can be used in substitution of standalone cascading style sheets. Site Builder implements cascading style sheets using embedded inline styles and document-wide styles.

Internet

A global computer network composed of thousands of Wide Area Networks (WANs) and Local Area Networks (LANs) that use TCP\IP to provide worldwide communication to governments, universities, businesses, organizations, and individuals. The Internet hosts the World Wide Web.

Internet address

A unique identifier for a Web site on the Internet. Users can access a Web site by entering its Internet address in a Web browser address bar or clicking a link that contains the Internet address. For example, http://www.stellent.com. Also known as host name or network location.

Internet Explorer

Microsoft's Web browser used to interpret HTML markup and Internet protocols (HTTP and FTP), thus allowing users to browse the World Wide Web. Site Builder provides previewing capabilities of both templates and Web pages using Internet Explorer or Netscape Navigator.

Internet Information Services

Microsoft's Web server software used to deliver Web pages on the World Wide Web. IIS incorporates numerous server-side functions for its native ASP (Active Server Page) scripting language. IIS can also be used as an FTP server to transfer documents over the Internet.

intranet

One or more Web servers located inside an organization's internal network that are used to store internal company information. Intranets generally exist as a separate Web site from an external or customer Web site. Anyone connected directly to the network, such as an employee, can access the intranet site.

IP address

A numerical address that identifies a computer on the Internet. An IP address comprises four sets of numbers (up to three digits each) separated by periods. An IP address can be used as an alternative to a domain name when the domain name is assigned a dedicated IP.

Java

A general-purpose programming language created by Sun Microsystems. Java can be used to create Java applets. A Java program is downloaded from the Web server and interpreted by a program running on the machine containing the Web browser.

Java Server Page

A technology for serving Web pages through the use of servlets, or small programs that run on the Web server. JSP is similar to Microsoft's Active Server Pages (ASP)—they both request programs from the Web server before displaying the results in a Web browser. JSP pages contain the .jsp file extension.

JavaScript

A cross-platform, Web scripting language developed by Netscape Communications and Sun Microsystems, Inc. Compared to Java, JavaScript is limited in performance because it is not compiled before execution. Basic online applications and functions can be added to Web pages with JavaScript, but the number and complexity of available application programming interface functions are fewer than those available with Java. JavaScript code can be added to existing HTML code in a Web page.

JPEG (.jpg)

Joint Photographics Experts Group. A compressed graphics file format used to display high-resolution color graphics. JPEG is a popular format for photographs and images rich in color and detail. Site Builder can convert graphics in source documents into the JPEG format.

key word index

An optional reference page you can build for your Web publication when you translate source documents. This alphabetical list is based on index entries embedded in the source documents. Site Builder automatically links each entry in the index to the appropriate Web page. Also known as index.

Layout options

A feature in Site Builder that can be used to create a frameset or HTML table layout for a Web publication. With Layout options, you can design where items should appear on the Web page. You can do this by using the settings in the Layout dialog box or by attaching your own custom layout created in a third party editor (Microsoft FrontPage, Macromedia Dreamweaver, Adobe GoLive, etc.).

library

A collection of folders in a repository containing documents that can be checked into and out of the repository. A library typically would be identified with a specific location or function in an organization.

link

A pointer in one part of a Web publication that a reader can click to navigate to related information in another part of the same publication or in another publication entirely. Links permit rapid, easy movement between related information and are often coded to change color once they have been selected or used on the Internet.

linked publication

A publication with its own project file that is linked to an existing project, which becomes the master project, as a result. You must open the linked publication by itself in Site Builder in order to edit it. Once the linked publication is edited, you can update it within the master project by using the Update Versions command.

list

A series of related items in paragraphs, usually set off by numbers (a numbered or ordered list) or bullets (a bulleted or unordered list).

list element

An item in a list tagged with the HTML List Item tag .

List of Figures

A reference page you can build in Site Builder to summarize all the figures of a publication. Since you can promote any kind of content to a List of Figures, it can be used in the same way as two other reference pages: List of Tables and Table of Contents.

List of Tables

A reference page you can build in Site Builder to summarize all the tables of a publication. Since you can promote any kind of content to a List of Tables, it can be used in the same way as two other reference pages: List of Figures and Table of Contents.

local link

A link that connects two pieces of related information in the same Web page.

logging in

The process of identifying oneself to an account through a username and password.

main window

What you see when you run Site Builder (with the Startup Screen closed). Contains the title, menu, and status bars, the main toolbar, the large toolbar, the Publication Hierarchy pane and the Contents pane (which summarizes key information about the source documents you select for translation). After you work in the four property sheets to edit a template, you always return to the main window to save the project file, translate the publication, and view the Web publication you create.

manually formatted document

A source document that contains only one named style or no styles at all. Also known as an unstyled document. Site Builder translates such documents by identifying patterns in the use of font type and size, bold and italic, and so on. It names and imports the patterns just as it does styles for a styled document.

markup

The process of embedding special characters in a text file that tells a computer program how to handle the contents of the file itself. HTML tags are a form of markup.

markup language

A defined set of markup tags.

master project

The same as a regular project except that it contains one or more linked publications; that is, one or more subpublications in the project's publication hierarchy contain a link to another project file.

menu bar

The horizontal bar at the top of the main window that lists the names of the menus available. Each menu contains a drop-down list of commands.

Meta tag

The HTML tag that must appear in the <HEAD> portion of an HTML file. A Meta tag supplies information about a Web page but does not affect its appearance.

metadata

"Data about data." In addition to content, the typical source document has a title, author, and other properties associated with it that can be used in different ways. Content Publisher recognizes three types of metadata: standard, custom, and repository.

Standard metadata are automatically generated by the application that was used to create the source document. Custom metadata are properties that you create in the application for the source document. (Not every document has standard or custom metadata.) And repository metadata are special properties (security group, document ID, version number, etc.) that you assign to content stored in a content management system, an FTP, or HTTP site.

named style

A set of formatting characteristics that have been saved and assigned a name, and which can be applied to any paragraph in a source document. For example, Heading 1, which may be Arial 18-point bold.

navigation

The process of using links and other devices to move within and between Web pages.

Navigation

A property sheet in Site Builder in which you add navigation aids to your Web publication.

navigation aid

A pointer in one part of a Web publication that guides readers to related information in another part of the same publication or another publication entirely. Links permit rapid, easy movement between related information. Navigation aids often come in the form of buttons with labels such as "Previous" and "Next" to denote their purpose.

navigation bar

A series of hypertext links arranged on a single line of a Web page to provide a set of navigation controls for a Web publication. Site Builder lets you create both button and text bars, for a Web page as a whole and for specific elements.

Netscape Navigator

Netscape's Web browser used to interpret HTML markup and Internet protocols (HTTP and FTP), thus allowing users to browse the World Wide Web. Site Builder provides previewing capabilities of both templates and Web pages using Netscape Navigator or Internet Explorer.

numbered list

A series of related items in paragraphs, numbered sequentially. Also known as an ordered list.

OLE

Object Linking and Embedding. A technology or method for sharing information between applications. If a Word or Excel document in Site Builder contains an embedded object, that object can be converted to a linked graphic file that targets the object in its native application.

online

Information, activity, or communications located on or taking place in an electronic, networked computing environment like the Internet. The opposite of off-line, which is how you work when your computer is not connected to the Internet or any network.

output directory

The directory in which you store files once source documents have been translated into HTML format or passed through in their original format. Also used to store the HTML files for reference pages and the graphics in source documents once they are converted into the GIF, JPEG, PNG, WBMP, or BMP format. The output directory can be changed in the Publication and Document Properties dialog boxes.

output HTML file

The file that Site Builder creates when it converts a source document into a body page or builds a reference page during translation.

output page

What you generate when you translate a publication. There are two kinds. You create a body page for each source document you translate. You can also build optional reference pages during translation.

page

A Web page, that is, a single file that users view in a Web browser. Web publications typically consist of many Web pages, the one that opens by default being the home page. Pages must be linked to enable users to navigate through a Web publication.

page button bar

A navigation aid for moving between Web pages, consisting of buttons with labels such as "Previous" and "Next" to denote their purpose.

page Table of Contents

The table of contents (TOC) for a single Web page that appears at the beginning of the page in a Web browser and is part of the same HTML file. Different from the publication

TOC, which is an optional reference page that summarizes the content of all the pages of a Web publication and exists as a separate HTML file.

page text bar

A navigation aid for moving between Web pages consisting of text drawn from specific elements.

paragraph

The fundamental unit of a text or word processing file that defines content. A paragraph can be associated with only one style. In an HTML file, it is defined by the markup tag <P>.

parent directory

A directory that contains other directories. Directories are also called 'folders.'

password

A string of letters and numbers associated with a username that together make up a login. The password adds security to the login, preventing others from using it to gain access to the computer or network. A password character usually display as an asterisk (*) to prevent others from seeing or using the password.

path

The sequence of drive, directory, and subdirectory names that defines a file's location, such as C:\Program Files\Stellent Content Publisher\. Also refers to the portion of a URL that identifies the folder containing a file. In

http://www.stellent.com/techsup/more/techsup.htm, the path would be /techsup/more/.

pattern

A set of text attributes in a source document that Site Builder can identify and associate with an element. If a manually formatted source document has headings in Arial, 18-point, bold, you can base a pattern on these attributes and associate this pattern with an element. You can then use this element to format the content associated with the pattern. There are two kinds of patterns in Content Publisher: paragraph and character.

pattern attribute

An individual character or text attribute such as Bold used to create a pattern.

pattern string

The string of characters used by Site Builder to identify a pattern in a source document. For example, the pattern string **[Bullet][A-Z][A-Za-z]+** tells Site Builder to search for a pattern of text in the source document that begins with a bullet, followed by an upper-case letter, followed by one or more upper-case or lower-case letters.

pixel

Short for picture element. A pixel is the smallest 'dot' your computer screen is capable of rendering at the resolution determined by your hardware and software. The size of a pixel may vary from system to system, depending on your graphics adapter, the screen resolution specified in the operating system setup, etc. Common screen resolutions are 640 by 480 pixels, 800 by 600, and 1024 by 768.

plug-in

One of a set of software modules that can be integrated into a Web browser to offer a range of interactive and multimedia capabilities.

PNG (.png)

Portable Network Graphics. New graphics format designed to replace the older and simpler GIF format. Offers superior compression and display capabilities. One of five formats available in Site Builder when converting graphics in source documents.

Preview window

A window inside a dialog box that shows you what your source document will look like in a Web browser, once translated. Site Builder lets you preview Web pages in the Choose Template and Edit Template dialog boxes.

problem report

A report written to highlight a problem with the content or some other aspect of a Web page that is part of your staged output. The report is written in the problem report section of a special version of the Content Information page, which is created when you register a project on the staging server. Problem reports can be used in conjunction with staging workflow to review your staged output.

project

The overall term for the Web publication you create that encompasses the project file, its templates, and all source documents, related graphics, and associated files.

project file

What you need to begin a new project. Site Builder starts with a copy of the default project file already open ("Unsaved" appears in the title bar). You use a project file to save important details about a project, including the publication hierarchy, the location of source documents, the template associated with each document, and the location of output directories for the HTML files produced during translation. Two default project files are available: Default.tcp is used to create HTML projects, and DefaultWML.tcp is used to create WML projects.

promotion

The process of making the specified content of a source document available for inclusion in one or more reference pages. Once you promote an element in the template of the source document, you must then edit the template of the reference page to ensure that the element is included in the reference page.

properties

The characteristics of a publication, source document, reference page, element, rank, style, or pattern. For example, the name of a publication is one of its properties. Properties can be viewed and edited in the various Properties dialog boxes.

property sheet

An interface in Site Builder with a series of tabs that provide access to commands and options for carrying out specific tasks. Element Setup, Formatting, Navigation, and Globals are all property sheets.

protocol

A method for two devices to communicate over the Internet. A protocol is an algorithm, or step-by-step procedure, carried out by such devices. File Transfer Protocol (FTP) and HyperText Transfer Protocol (HTTP) are protocols used to transfer files over the Internet.

publication

A container for the source documents that you want to translate and any reference pages you want Site Builder to build. Each new project has a root publication. (Its default name, "Unnamed," appears at the top of the Publication Hierarchy pane.) You can create a publication hierarchy by adding publications to the root publication, publications to those publications, and so on. (Each publication, when added to another, becomes a subpublication.)

publication hierarchy

The structure of a project in Site Builder in terms of its publications and documents. In addition to helping a Webmaster organize a publication, the hierarchy determines the order in which documents are translated, the order of items in a TOC, and so on.

Publication Hierarchy pane

One of two panes in the main window of Site Builder where project setup takes place. The Publication Hierarchy pane displays the root publication and all subpublications. The Contents pane summarizes key information about the source documents for the publication selected in the Publication Hierarchy pane.

publication Table of Contents (TOC)

An optional reference page in Site Builder that can be used to summarize information in a Web publication. You can promote any kind of information to the publication TOC, not just headings. When you promote elements, Site Builder builds the publication TOC by deriving content associated with those elements from the body pages. It also automatically links the entries in the publication TOC to content in the body pages. Two other reference pages—List of Tables, List of Figures—can be used in the same way.

publishing

Part of the dual-publishing feature in Content Publisher. When you publish a project, Site Builder (or Site Server) copies translated documents from the output directory of your file system to a publishing server—in effect, your Web site. As part of the dual-publishing feature, you can first "stage" your project to a staging server (a preview area) before you publish to the "live" Web site.

publishing server

The final or publicly available Web site that usually follows a staging phase. Publishing server details can be set up in the Publishing Options dialog box (a part of the dual-publishing feature in Content Publisher).

Query reference page

A special kind of reference page that can be used to search for information throughout a Web site, that is, the content server in which the Web publication resides.

rank

Used by Site Builder to identify the structure of a source document based on the hierarchy of content in that document. As a result, the top-level hierarchy of each source document is treated the same. This is especially useful when translating legacy documents or

documents from a Directory Item. In the Choose Template dialog box, the default setting under Import Styles or Patterns is None, which means that a default set of ranks is applied to the document rather than importing styles or patterns.

raster image

An image formed by light and dark pixels in a rectangular array, rather than by a collection of lines, as in a vector graphic.

reference page

An optional page built during translation. Reference pages (except for Query pages) derive their content from body pages and are automatically linked to them. There are five types: publication Table of Contents (TOC), List of Tables (LOT), List of Figures (LOF), Index, and Query. Each one is an HTML file. The TOC you place at the beginning of a body page is a "page TOC" and is a part of the same HTML file as the body page. Its contents typically differ from the contents of the publication TOC.

registration

The process of establishing a connection between Content Publisher (and its projects) and Content Server. There are many forms of registration: (1) registering a content server with Content Publisher, (2) registering a project on a source server in order to preview source documents, (3) registering a project on a staging server to enable staging workflow, and (4) registering a username and password in Site Server to automate publishing with Content Server. There is another form of registration performed automatically by Content Publisher that improves project performance in Content Server.

relative URL

The Internet address of a Web page with respect to the Internet address of the current page. A relative URL gives the path from the current location of the page to the location of the destination page. For example, the relative path from fileA.htm to fileB.htm, where fileB.htm is stored in a subfolder called 'news,' would be 'news/fileB.htm.'

repository

A place where electronic files are stored (and often managed). In Site Builder, the file system, an FTP site, an HTTP site, and Content Server are all repositories.

root publication

The top-level publication in a project in Site Builder. All publications directly below the root publication are subpublications. You can add publications to subpublications to create additional subpublications at different levels in the Publication Hierarchy.

root web

The default or top-level of a Web site. The root web can be accessed by entering the Web site URL without specifying a subfolder or Web page. In Site Builder, the root web location is specified in the Output directories of the root publication properties.

RTF (.rtf)

Rich Text Format. A method of encoding text formatting and document structure using the ASCII character set. Site Builder can translate source documents in RTF format.

screentip

A popup that appears when you pass your cursor over an element of the interface. For example, if you place your cursor over a button on the toolbar, the name of the button will display in a popup. Screentips are also used in the Preview window of the Edit Template dialog box in Site Builder. As you pass your cursor over content, a popup displays the name of the element associated with that particular piece of content.

script

A type of computer code that can be executed by a program that understands the scripting language. Unlike most computer code, a script does not need to be compiled to run. Many scripts are placed on Web servers where they are read and executed by Web browsers.

separator

A graphical aid similar to a rule that Site Builder can place in a document to set off different portions of the content.

server

A computer that offers services on a network. On the Web, servers run the Web server software that responds to HTTP protocol requests and delivers Web pages.

server-side include

A process whereby a script and a Web server function together to automatically include the text from one Web page in another Web page. This process takes place when a Web browser requests a Web page from a Web server. Site Builder uses server-side includes to dynamically include reference pages in an HTML table.

graphics set

A collection of graphics provided in Site Builder, available from the Gallery. Each graphics set is uniquely designed and consists of a series of navigation buttons, a bullet, a separator, and a background. There are 28 Sets in Site Builder.

SGML

Standard Generalized Markup Language. An ISO (International Standards Organization) markup language for defining and using a set of tags to denote the nature of document content. HTML is based on SGML.

signature

An identifier you can add to a Web publication to specify such things as the Webmaster or copyright information. You do this in the Address tab dialog of the Globals property sheet.

source document

The content you want to translate into HTML as part of your overall Web site. Site Builder converts source documents from many formats into Web viewable formats. Once you translate a source document, it becomes a Web page for viewing in a Web browser.

split

The process of taking a source document and turning it into multiple Web pages to facilitate browsing and downloading. A default option in Site Builder allows you to use Heading 1 to split a document into a series of Web pages, each beginning with Heading 1 content.(You can use another element if you prefer, or even multiple elements.) Another option allows you to create multiple Web pages by splitting on each hard return in the source document.

staging

Part of the dual-publishing feature in Content Publisher. When you stage a project, Site Builder (or Site Server) copies the translated output from the file system to a content server known as the staging server so that the contents of your Web publication can be formally reviewed and approved before being published. If you set up workflow on the staging server (and register the project on that server), you can use workflow to facilitate the review process.

staging server

A Web site that is intended for internal review, proofing, and workflow before the site is published to a publishing server (your final Web site). Staging server details can be set up in the Staging Options dialog box (a part of the dual-publishing feature in Content Publisher).

staging workflow

The process that facilitates the formal review of Web pages on a staging server before a project is finally approved and published. If workflow has been set up on the staging

server and the project has been registered on that server, workflow begins automatically as soon as the project is staged.

Startup Screen

The opening screen on top of the main window that displays when you first start Site Builder. It contains alternative ways to start a new publication or open an existing one. It also offers access to the "Seven Easy Lessons" and the Tutorial.

status bar

The area at the bottom of the Site Builder main window that displays information about the currently selected command. Also, the area at the bottom of a Web browser that displays information about a Web page, connection status, etc.

style

A set of formatting characteristics with an assigned name that defines how text appears in a document. In Content Publisher, there are two kinds of styles: paragraph and character. Styles can be assembled together to make up a style sheet or Cascading Style Sheet.

style sheet

A set of formatting instructions that control how a Web page will display in a Web browser. See also Cascading Style Sheets.

subdirectory

A directory within or below another directory. Directories and subdirectories are also called folders and subfolders.

subpublication

Any publication added to the root publication or another subpublication. A subpublication can be exported from one project to become a publication in a new project or a subpublication in another project.

tab dialog

A particular type of dialog box in Site Builder that you open by clicking a tab on one of the property sheets, for example, the Character tab on the Formatting property sheet.

table

A series of cells organized in rows and columns used to arrange data systematically. In HTML, a table can be used to organize the layout of items (text, graphics, etc.) on a Web

page. The Layout dialog box in Site Builder can be used to create framesets or HTML tables for your Web publication.

Table Layout

One of the options in the Layout dialog box of Site Builder (the other option is Frameset Layout). Users can design a layout for a publication using HTML tables and HTML table cells. Each table cell serves as a placeholder for a reference page, a body page, or another component.

tag

The formal name for an HTML markup element. HTML tags are enclosed in angle brackets (<>). Site Builder automatically generates an element for each imported style or pattern, and then assigns an HTML tag to each element.

target frame

The frame that all hyperlink targets should display in. It is most common to place hyperlinks in one frame and assign a separate frame as the target frame. This way, your reference pages (containing the hyperlinks) display in one frame, and the body pages display in another frame.

TCP (.tcp)

The extension for a project file created in Site Builder.

TCP/IP

Transport Control Protocol/Internet Protocol, a standard format for transferring data in packets from one computer to another. This protocol is used on the Internet and other networks. The first part of this standard, TCP, constructs the data packets; the second part of this standard, IP, routes the packets from computer to computer.

template

A set of formatting and other instructions for text and images that determines how a source document will display in a Web browser once it is translated. Most of the instructions are associated with the individual elements that reside in the template, though some are associated with the template itself. Only one template can be associated with a given document, but the same template can be associated with many documents. A template is typically saved with the project file. You can export and import templates by creating standalone template files. You can also link source documents to external, standalone template files.

text mode

A mode of operation in which a computer or Web browser displays letters, numbers, and other characters but no graphical images. A text mode Web browser cannot display graphics without the assistance of a helper application.

thumbnail

A miniature rendering of an image used as a placeholder and linked to the full-sized image.

TIFF (.tif)

Tagged Image File Format. A tag-based image format used for the universal interchange of digital graphics. Site Builder can convert TIFF images into the GIF, JPEG, PNG, WBMP, or BMP format.

title

1) Text supplied between the <TITLE> and </TITLE> tags in an HTML file to define the caption that displays in the title bar of the Web page when it's viewed in a Web browser.

2) The text that can be added at the beginning of a Web page in Site Builder. (You set titles in the Titles tab dialog of the Globals property sheet.)

title bar

1) The horizontal bar at the top of the main window in Site Builder that displays the name of the project file currently open as well as the application name.

2) The bar at the top of the Web browser that displays the title of a Web page or the path and name of the HTML file being shown.

Title (System)

A special element that is part of every template in Site Builder. Used to format titles in a Web page, that is, the information set in the Titles tab dialog of the Globals property sheet.

token

A snippet of code that can be placed in a publication in place of a file name or path statement. The token acts as a variable (or placeholder) for other content in a publication. This content could be a graphic file, a reference page, template settings, and more. When a publication is translated, staged, and published, the token is replaced with the correct path and file name for the content it represents. As a result, you never have to worry about updating path statements when you move or expand a publication.

toolbar

A series of icons that allow you to execute commands quickly by clicking a button rather than choosing a command from a pull-down menu. In Site Builder there is a main toolbar, which is located at the top of the main window, beneath the menu bar. There is also a large toolbar, which displays down the right side of the main window.

translation

The process of creating Web pages from source documents in Site Builder. The formatting and other instructions contained in a template control the translation details. The source documents remain unchanged.

transparent GIF

A specially rendered GIF image in which one 'color' is transparent, allowing the background to show through. This type of graphic blends with the document's existing color scheme and provides a more professional-looking Web page. Not all Web browsers are capable of handling transparent GIFs.

TTP (.ttp)

The extension for a template file in Site Builder. Generally, a template exists as part of the project file. But you can create a standalone template file that can be linked to that or another project file or imported into another project. In which case, Site Builder assigns the .ttp extension.

UNIX

A multi-user and multitasking operating system that exists in various forms and implementations. Unix is typically used with proprietary computer and software systems and unlike Microsoft Windows, it is primarily a command line environment.

Update Versions

The command used to update source documents. Except for single source documents on the file system, the command is required to update all source documents before an important translation, including those in Directory Items and from Content Server or an FTP or HTTP site. In the case of Content Server, Site Builder doesn't check documents out of the content server. Rather, it identifies the version current during project setup and obtains a copy of that version for all translations. Update Versions identifies the latest version of a document available so that Site Builder can use that for your final translation before publishing to a content server. You can automate the command in Site Builder. Site Server automatically updates all source documents when it runs a project.

upload

To transfer a file from a local computer to a remote computer on a network or the Internet.

URL

Uniform Resource Locator. A unique address that specifies where a document can be found on the Internet along with the protocol needed to locate the document (such as HTTP or FTP). URLs tend to be quite long, and you must enter the exact address in order to view the Web site associated with the URL.

username

A string of letters (and possibly numbers) that together with a password make up a login. Your username uniquely identifies you to the computer or network you are logging on to.

VBScript

A subset of the Microsoft Visual Basic programming system. Major Web browsers can read VBScript that is embedded in a Web page. VBScript can be executed on the Web server and the Web browser machine. Microsoft ASP (Active Server Pages) supports VBScript functions.

vector graphics

An image created by a collection of lines rather than a pattern of dots (pixels), as in a raster image.

visited link

A hyperlink on a Web page that has been activated. Visited hyperlinks are usually displayed in a unique color by the Web browser.

watermark

An image that appears on the background of a Web page that is used to decorate and identify the page or Web site but does not scroll as the page scrolls.

Web

An abbreviation for World Wide Web. A subset of Internet servers that support HTTP protocol and can host hypertext documents.

Web browser

Software that is used to request information from the Internet, interpret HTML markup, and display Web pages to the user. Microsoft Internet Explorer and Netscape Navigator are among the most common Web browsers.

Web page

A file containing HTML intended for display in a Web browser. Web sites are comprised of individual Web pages that contain hyperlinks to one another. Site Builder creates Web pages and ultimately Web sites from your source documents when you translate your publication.

Web publication

What you create in Site Builder to display in a Web browser. Consists of one or more Web pages that contain the content of the source documents you translated plus optional reference pages, such as an Index, you built during translation.

Web server

A computer connected to the Internet that stores files and makes them available to the public. Web server software runs on top of an operating system.

Web site

A collection of HTML or scripting-based Web pages that are linked together and stored on a Web server. Every Web site has a unique URL so that it can be accessed publicly on the World Wide Web. In Content Publisher, this is where you stage or publish a publication. The staging server is essentially a preview Web site, and the publishing server is the final Web site.

Webmaster

A person who creates and maintains the content and organization of a Web site. In the Content Management system, this individual is responsible for reviewing a project on the staging server and for authorizing its final approval and release to the Web site (publishing server).

World Wide Web

A subset of Internet servers that support HTTP protocol and can host hypertext documents. Hypertext documents may contain text, pictures, sounds, and other media. Users view such documents using a Web browser. The World Wide Web is also called the 'Web.'

World Wide Web Consortium (W3C)

A consortium of institutions that performs research and promotes standards in areas related to the World Wide Web.

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