



# Information Manager Content Authoring Guide

---

*A Guide to Creating Content in Information Manager*

---

InQira Version 8.2.2  
Document Number IM82-AG-00  
May 11, 2010

**InQira, Inc.**  
900 Cherry Ave., 6<sup>th</sup> Floor  
San Bruno, CA 94066

## COPYRIGHT INFORMATION

Copyright © 2002 - 2010 InQuira, Inc.  
Product Documentation Copyright © 2003 - 2010 InQuira, Inc.

## RESTRICTED RIGHTS

This document is incorporated by reference into the applicable license agreement between your organization and InQuira, Inc. This software and documentation is subject to and made available only pursuant to the terms of such license agreement and may be used or copied only in accordance with the terms of that agreement. It is against the law to copy, modify, disassemble or reverse engineer the software and documentation, except as specifically allowed in the license agreement and InQuira will take all necessary steps to protect its interests in the software and documentation. To the extent certain third party programs may be embedded into the InQuira software, you agree that the licensors for such third party programs retain all ownership and intellectual property rights to such programs, such third party programs may only be used in conjunction with the InQuira software, and such third party licensors shall be third party beneficiaries under the applicable license agreement in connection with your use of such third party programs.

This document may not, in whole or in part, be photocopied, reproduced, translated, or reduced to any electronic medium or machine readable form without written prior consent from InQuira, Inc., which may be withheld in its sole and absolute discretion.

The information in this document is subject to change without notice and does not represent a commitment on the part of InQuira, Inc. The documentation is provided "AS IS" without warranty of any kind including without limitation, any warranty of merchantability or fitness for a particular purpose. Further, InQuira, Inc. does not warrant, guarantee, or make any representations regarding the use, or the results thereof. Although reasonable measures have been taken to ensure validity, the information in this document is not guaranteed to be accurate or error free.

## TRADEMARKS AND SERVICE MARKS

InQuira, Inc., InQuira 8, InQuira 7, InQuira 6, InQuira 5, InQuira Natural Interaction Engine, Information Manager, Call Center Advisor, and iConnect are trademarks or registered trademarks of InQuira, Inc.

Sentry Spelling-Checker Engine Copyright © 2000 Wintertree Software, Inc.

All other trademarks and registered trademarks contained herein are the property of their respective owners

---

# Contents

---

Preface: About This Guide .....	1
In This Guide .....	2
Contacting InQuira .....	2
InQuira Product Documentation .....	3
Intelligent Search Documentation .....	3
InQuira Analytics Documentation .....	5
Information Manager Documentation .....	6
Contact Center Documentation .....	7
Screen and Text Representations .....	7
References to World Wide Web Resources .....	7
.....	7
<b>Chapter 1 Getting Started .....</b>	<b>9</b>
Log into the Management Console .....	10
An Author's View of the Management Console .....	11
INBOX Page .....	12
SEARCH Page .....	13
CONTENT Page .....	15
FEEDBACK Page .....	16

Create a Content Record .....	16
<b>Chapter 2 Working with Information Manager Content .....</b>	<b>19</b>
Content Records .....	20
Accessing the Information Manager Content Area .....	20
Listing Content Records for a Channel .....	22
Searching for Content .....	23
Searching for Content by Document ID .....	26
Batch Operations on Multiple Records .....	27
Adding a New Content Record .....	30
Filling in Content Record Fields .....	33
Creating a New Content Record from an Existing Record .....	36
The Content Preview Page .....	37
The Content Section of the Preview Page .....	38
The Task Details .....	39
The Content Data Section of the Preview Page .....	40
Content Properties .....	40
Content Info .....	42
Content Feedback .....	44
The Workflow Section of the Preview Page .....	45
Modifying Existing Content .....	46
Invalid Characters .....	48
Viewing Content History .....	49
Reverting a Content Record to a Previous Version .....	50
Related Content Records .....	51
Redirecting Content Records .....	53
Comparing Record Versions .....	56
Deleting Content from the Information Manager .....	58
Linking Cases to Content Records .....	59
Recommending Content .....	61
Listing Recommended Content .....	63
Finding Recommended Content .....	63
Completing a Recommendation .....	65
<b>Chapter 3 Working with Tasks .....</b>	<b>67</b>
Action and Notification Tasks .....	68
Listing INBOX Tasks .....	70
Filtering the Task List .....	71
Viewing Task Details .....	72
Assigning Tasks to Users .....	73
Assigning Multiple Tasks to a User .....	74
Performing Tasks .....	74

Ignoring Tasks ..... 75



---

## Preface      About This Guide

---

This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.

This preface includes information on:

- The general organization of this guide
- The support services available from InQuira Customer Support
- The available product documentation

## In This Guide

---

The Information Manager Content Authoring Guide is divided into the following sections:

<i>Chapter 1, Getting Started</i>	This chapter is a quick start to authoring Information Manager content.
<i>Chapter 2, Working with Information Manager Content</i>	This chapter describes how to author content in Information Manager.
<i>Chapter 3, Working with Tasks</i>	This chapter describes how to work with tasks in Information Manager.

## Contacting InQuira

---

You can contact InQuira by mail, telephone, fax, and email.

<b>Address:</b>	InQuira, Inc. 900 Cherry Ave., 6th Floor San Bruno, CA 94066
<b>Telephone:</b>	(650) 246-5000
<b>Fax:</b>	(650) 264-5036
<b>Email:</b>	For sales information, send email to <a href="mailto:sales@inquira.com">sales@inquira.com</a> . For product support, send email to <a href="mailto:support@inquira.com">support@inquira.com</a> .
<b>World Wide Web:</b>	Learn more about InQuira products, solutions, services, and support on the world wide web at: <b><a href="http://www.inquiracom.com">www.inquiracom.com</a></b> .



# InQuira Product Documentation

---

InQuira documentation is available only to licensed users of our software products and may not be redistributed in any form without express permission from InQuira, Inc.

The InQuira documentation is available in PDF format. Customers can download the PDF files from:

<http://documentation.inquiracom.com/>

---

**NOTE:** You need a PDF reader application installed on each processor on which you plan to view the InQuira product documentation. The Adobe Acrobat reader is available from Adobe Systems at: <http://www.adobe.com>.

---

Detailed information about each product document set is available in:

- [Intelligent Search Documentation on page 3](#)
- [InQuira Analytics Documentation on page 5](#)
- [Information Manager Documentation on page 6](#)
- [Contact Center Documentation on page 7](#)

If you encounter a problem, need help using the documentation, or want to report an error in the content, please contact InQuira Customer Support.

If you need help obtaining InQuira product documentation, or want to obtain permission to redistribute a portion of the contents, please contact your InQuira account representative.

## Intelligent Search Documentation

---

Intelligent Search is distributed with the following documentation.

Document	Number	Description
<b>Intelligent Search Installation Guide</b>	IS80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira 8.1. It provides detailed information on installing InQuira 8.1 and configuring the application on a single processor using the Installation Configuration Environment facility.

<b>Intelligent Search Administration Guide</b>	IS80-CA-00	This guide is intended for system and application administrators who need to configure an InQuira 8.1 application in an enterprise environment. It describes InQuira 8.1 integration, development, configuration, and maintenance processes and tasks.
<b>Intelligent Search Language Administration Guide</b>	IS80-LA-00	This guide is intended for business users and subject matter experts who need to create and maintain the language processing elements of an InQuira 8.1 application using the System Manager. This book provides usage information about the System Manager, conceptual information about the InQuira 8.1 language objects, and task information about the process of managing the user experience provided by the InQuira 8.1 application.
<b>Intelligent Search Language Tuning Guide</b>	IS80-LD-00	This guide is intended for application developers who need to create and maintain advanced InQuira 8.1 language-processing elements using the Dictionary and other InQuira Language Workbench applications.
<b>Intelligent Search Optimization Guide</b>	IS80-AG-00	This guide is intended for application developers who need to implement InQuira 8.1 advanced features, including Personalized Navigation and Process Wizards.
<b>Intelligent Search Application Development Guide</b>	IS80-API-00	This guide provides information about integrating and customizing the InQuira 8.1 Personalized Response User Interface.

<b>Intelligent Search Language Reference</b>	IS80-LRG-00	This guide is for language developers implementing InQuira 8.1 applications that utilize the intent libraries and advanced language processing functions. These guides are published as separate documents that provide reference information for each industry-specific intent library. Each reference also contains complete descriptions of InQuira Match Language and Variable Instantiation Language.
<b>Intelligent Search User Interface Guide</b>	IS80-UI-00	This guide is intended for application developers who need to customize the InQuira 8.1 Personalized Response User Interface, and integrate it with a production web application. It contains information about the elements and features of the User Interface, and provides guidelines for integrating it into an enterprise web architecture, customizing its appearance and functionality, and implementing various special features.

## InQuira Analytics Documentation

InQuira Analytics is distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>InQuira Analytics Installation Guide</b>	IA80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Analytics. It provides detailed information on installing and configuring the InQuira Analytics product for use with an InQuira 8.1 application.
<b>Analytics User Guide</b>	IA80-CA-00	This guide is intended for systems and application administrators who need to configure the Intelligent Search and Information Manager Analytics components to report on InQuira 8.1 application performance.

## Information Manager Documentation

---

InQuira Information Manager is distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>Information Manager Installation Guide</b>	IM80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Information Manager. It provides detailed information on installing and configuring the Information Manager product.
<b>Information Manager Administration Guide</b>	IM80-CA-00	This guide is intended for systems and application administrators who need to configure and administer an InQuira Information Manager application, and integrate it with an InQuira 8.1 application. It also contains information for general business users who need to use the Information Manager to create and manage content.
<b>Information Manager Content Authoring Guide</b>	IM80-AG-00	This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.
<b>Information Manager Developer's Guide</b>	IM80-WSR-00	This guide is intended for application developers who need to integrate Information Manager content, content category, and user and security functions with external applications. It contains reference information and examples for all packages, classes, methods, and interfaces of the Information Manager Web Services API.

## Contact Center Documentation

---

The InQuira 8.1 contact center products are distributed with the following documentation.

Document	Number	Description
<b>Contact Center Advisor Integration Guide</b>	CA80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira Contact Center Advisor with an InQuira application and a supported CRM application.
<b>Intelligent Search Siebel Integration Guide</b>	CAS80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate InQuira 8.1 with Siebel 7 Enterprise Applications using the Siebel Adapter for InQuira 8.1.

## Screen and Text Representations

---

The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

## References to World Wide Web Resources

---

For your convenience, we refer to Uniform Resource Locators (URLs) for resources published on the World Wide Web when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

---



---

## Chapter 1      Getting Started

---

This chapter describes how to create and modify content in Information Manager. The topics are:

- *Log into the Management Console* on page 10
- *An Author's View of the Management Console* on page 11
- *Create a Content Record* on page 16

## Log into the Management Console

---

To log onto the Management Console as a general user:

- Open the URL provided by the Information Manager administrator for your organization in a browser, for example:

`http://<host_name>:<port>/InfoManager/WebObjects/InfoMgr.woa`

where:

<b>host_name</b>	Specifies the hostname for the system on which the application is installed, for example <code>localhost</code> , if applicable
<b>port</b>	Specifies the port designated for the Management Console application during the installation process. The default is 8080.

Alternatively, you can start the Management Console using the shortcut created by the standard installation process:

- Select **Start -> Programs -> InQuira\_8.0 -> Information Manager**



The Management Console login page displays:

A screenshot of the InQuira Information Manager login page. The page has a light blue background. At the top, the 'INQUIRA | information manager' logo is displayed. Below the logo, a message says 'Please enter your username, password and repository to log into Information Manager'. There is a login form with three input fields: 'USERNAME:' with the value 'jwriter', 'PASSWORD:' with the value '\*\*\*\*\*', and 'REPOSITORY:' with the value 'demo'. To the right of the repository field is a 'Log in' button with a right-pointing arrow. Below the login form, there is a link that says 'Forgot Password?'.

- Enter the user ID, password, and Repository information provided by your Information Manager administrator.



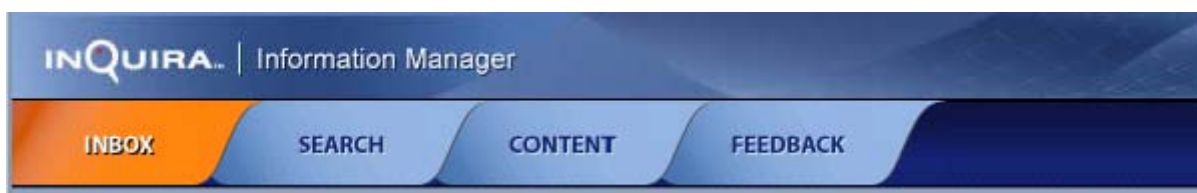
The Management Console displays the user's INBOX:



See [Listing INBOX Tasks on page 70](#) for information on how to use the INBOX page.

## An Author's View of the Management Console

An author's view of the Management Console varies, depending on the level of access granted to the author by the Information Manager Administrator. The main pages related to authoring content in Information Manager are shown below. This chapter provides a brief summary of the features on each page and directs you to the sections that describe how to use the features.



If you see additional tabs in your Management Console, see [An Administrator's View of a Content Repository](#) in the [Information Manager Administration Guide](#) for usage information.

## INBOX Page

The INBOX page lists the tasks that are available and assigned to you.

Assigned tasks are tasks that an authorized user, such as a supervisor or administrator, has directly assigned to you. Available tasks are tasks that you are authorized to perform. You may also be authorized to assign tasks to other users.

Available tasks and task actions are determined by the task privileges assigned to the security roles associated with your user profile. See [Performing Tasks on page 74](#) for more information on actions that users can perform.

To view your available and assigned tasks, select **INBOX** from the navigation area:

The screenshot shows the INBOX page in the INQUIRA Information Manager. The page has a navigation bar with 'INBOX' selected. Below the navigation bar, there are filters for 'Author: Author', 'Skills: On', 'Assignments', 'Views', and 'Channels'. The main content area is divided into two sections: 'Assigned to Author: Author (1)' and 'Available to Author: Author (1)'. Each section contains a table with columns for 'Age', 'Details', 'Type', and 'Priority'. The 'Assigned' section shows a task with a 1 min. age, details '388 - Does 388 track content records that get deleted?', type 'Work Flow Draft', and priority 'None'. The 'Available' section shows a task with a 22 hrs. age, details 'New content needed', type 'Recommendation', and priority 'Medium'. There are also buttons for 'Select All', 'Unselect All', 'Re-Queue', 'Close Task', 'Assign to Selected User', and 'Close Task'.

See [Chapter 3, Working with Tasks](#) for details on how to manage tasks in your task list.

You can use the following Filters function of the Task page to control the task display:

### Filters

Use the filtering options to view tasks for specific users, assigned/ or unassigned tasks, for only open or closed tasks, or for a specific view, channel or locale. See [Filtering the Task List on page 71](#) for details.

**NOTE:** The users filter displays only to users who have privileges to view tasks for other users as described in Specifying Management Console User Properties.

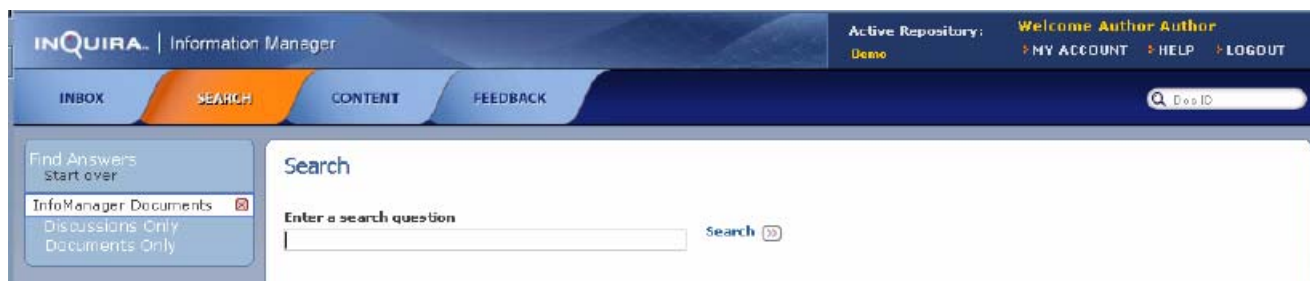
The Tasks page displays the following information for each task:

<b>Age</b>	This field displays how old the task is. Click on the link in the Age column to display the Task History page from where you can optionally perform the task or reassign it
<b>Details</b>	This field displays the master identifier for the task item. For content items, this is the document title. You can select this field to view details for this task as described in <a href="#">Viewing Task Details on page 72</a> . You can sort the task list by Details.
<b>Type</b>	This field displays the type of task as described in <a href="#">Action and Notification Tasks on page 68</a> . Authorized users can sort the task list by Type, and filter the task list by a selected task type.
<b>Priority</b>	This field displays the priority assigned to the task. Authorized users can sort the task list by Type, and filter the task list by a selected task priority.

## SEARCH Page

The SEARCH page allows you to search through Information Manager records, forum posts, and other documents by means

The makeup of your search page depends on how it was configured by your administrator. In general, the Management Console search page will be configured to search the same content as the Information Manager client. Below is an example of a search page configured to search Information Manager content, discussion forums, and a documentation set.



The SEARCH page displays the following information:

<b>Start Over</b>	Restart search.
<b>InfoManager Documents</b>	Select to search only Information Manager records.
<b>Discussions Only</b>	Select to search only posts in the Information Manager discussion forums.

<b>Documents Only</b>	Select to search only documents in the documentation set..
<b>Search</b>	Enter the search query in this field.

The results of the search query are displayed, along with the filters you can use to narrow down the results to a particular facet.

Find Answers  
Start over

Product Type  
Analytics (59)  
Information Manager (63)  
Search (110)

Document Type  
Solutions (230)

Product Version  
8.0 (87)  
7.3 (94)  
7.2 (89)

InfoManager Documents

Discussions Only

Documents Only

## Search

Enter a search question

Search 

**Best Results for "How do I delete a record?"**

Answers	Source	Relevancy
<p><b><u>Does IM track content records that get deleted?</u></b></p> <p>When a content <b>record</b> gets <b>deleted</b> from IM, the <b>record</b> gets <b>deleted</b> from the database. The only place where deletions get tracked is in the IM_HOME/logs/IMADMIN/audit/content log files. The info included in the logfile does not contain the content of the record, but there might be some useful info that you could use.</p>	Solutions	99.91 %
<p><b><u>What are the repercussions of deleting and readding console users to IM?</u></b></p> <p>All Linking a case id to a content record either via the management console or via the tag library or webservices does not work. If the user who created the content <b>record</b> has been <b>deleted</b> from the list of console users, the system can no longer link a new case to the content <b>record</b> .</p>	Solutions	99.87 %

## CONTENT Page

The CONTENT page lists all of the channels available to you. For each channel, you can:

<b>Add</b>	Add a new record to the channel. See <a href="#">Adding a New Content Record on page 30</a> for details.
<b>Find</b>	Locate one or more records in the channel. See <a href="#">Searching for Content on page 23</a> for details.
<b>List</b>	List the records in the channel. See <a href="#">Listing Content Records for a Channel on page 22</a> for details.

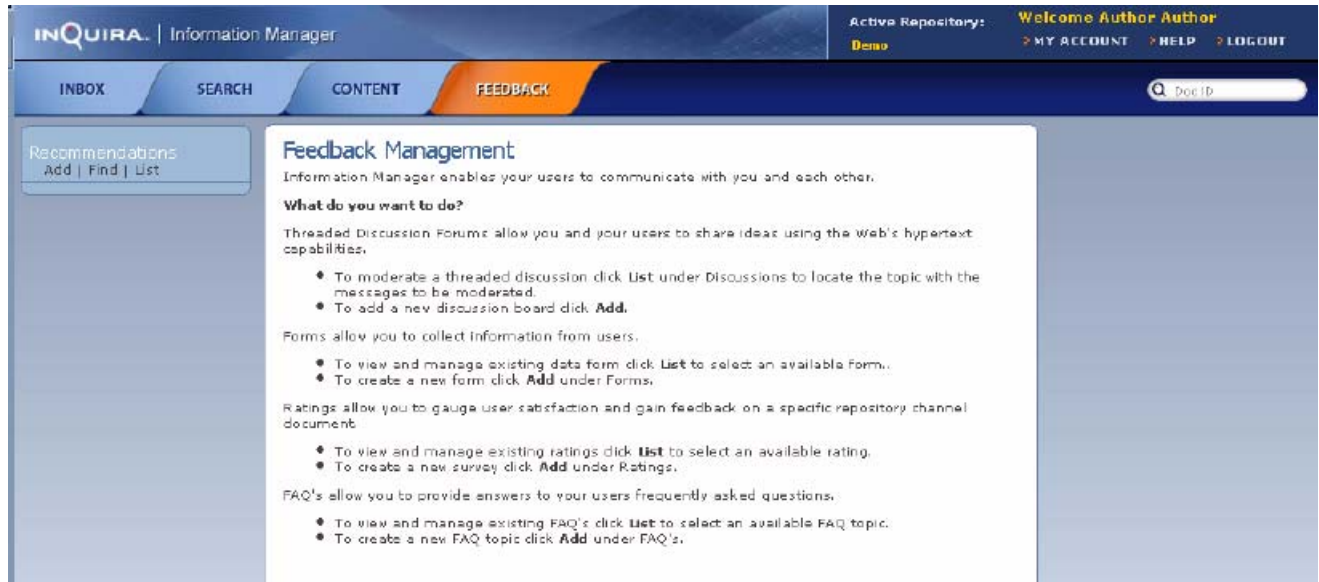


## FEEDBACK Page

---

For most authors, the FEEDBACK page enables you to **Add**, **Find**, and **List** content recommendations. You typically create a content recommendation when you are unable to locate a suitable answer to a question. See [Recommending Content](#) for details.

If you see more settings on your FEEDBACK page, see [Chapter 8, Feedback and Collaboration Features](#) in the *Information Manager Administration Guide*.



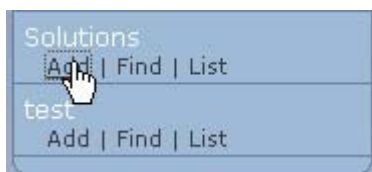
## Create a Content Record

---

Your Information Manager administrator should have created a repository containing one or more channels. Open the **Content** tab and locate the channel in which you want to create a new content record. In this example, we are creating a new content record in the 'Solutions' channel.

Create a content record:

- Select the **Add** option for the channel in which you want to add content:





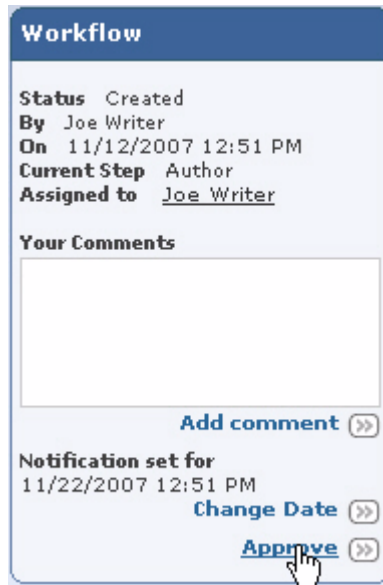


---

NOTE: The following assumes that the channel was set up with a 'Publish' workflow, as described in [Define a Workflow](#) in the [Information Manager Administration Guide](#).

---

- In the Preview page, approve the Author step in the workflow by selecting **Approve** in the **Workflow** box:



**Workflow**

Status Created  
By Joe Writer  
On 11/12/2007 12:51 PM  
Current Step Author  
Assigned to Joe Writer

Your Comments

Add comment >>

Notification set for  
11/22/2007 12:51 PM  
Change Date >>  
Approve >>

The content record is then advanced to the Review step in the workflow and is listed in the INBOX for console users who have the Review workflow step selected in their console role.



**Workflow**

Status Approved  
By Joe Writer  
On 11/12/2007 12:53 PM  
Current Step Review  
Assigned to Unassigned

See [Chapter 2, Working with Information Manager Content](#) for more information on creating and modifying content records.



---

## Chapter 2 Working with Information Manager Content

---

You can add, modify, and remove application content using the Management Console. The basic units of content in Information Manager are called content records; see [Content Records on page 20](#) for more information. You work with content in the Information Manager by creating or modifying content records. You create and maintain content by:

- Authoring the main body content intended for end users
- Specifying other required and optional data, such as publishing dates and meta-data

The optional and required data for a content record is determined by the content channel definition as described in Managing Content Channels.

You work with Information Manager content according to processes and privileges defined by your Information Manager administrator, including:

- The privileges assigned to your user ID as described in User Security Roles and Privileges
- The workflow process specified for the content channel in which you are working

Information Manager administrators can configure workflows to generate tasks and notifications, and assign tasks to users. Content-related tasks display in the Management Console INBOX, as described in [Chapter 3, Working with Tasks](#).

You can also work with content in response to external requests or processes. The Management Console will automatically process any authorized work and record the progress within the defined workflow regardless of the point of access.

## Content Records

---

A content record is analogous to an individual document of a particular type, such as a specific customer support case or press release. The Information Manager supports any number of types of content records. Each type of content record corresponds to a set of defined properties called a content channel as described in [Content Channels](#).

Information Manager administrators define content channels to determine the required document structure and attributes (metadata) for the various types of content to be managed within your organization.

You access content records using the Content tab on the Management Console main page, as described in [Accessing the Information Manager Content Area on page 20](#).

## Accessing the Information Manager Content Area

---

You access the Information Manager content area from using the Content menu on the Management Console main page.

---

**NOTE:** You can also access content related to configured workflows and tasks from your INBOX, as described in [Chapter 3, Working with Tasks](#).

---

To access the Information Manager content options:

- Select the **Content** menu item from the Management Console main page

---

NOTE: The Information Manager displays the Content options by default.

---



The Management Console lists the content channels and options that you are authorized to access.

You can select any of the available options at any time.

- Select the desired activity for the content channel in which you want to work:

<i><b>Option</b></i>	<i><b>Description</b></i>
<b>Add</b>	Use this option to create a new content record in the selected channel, as described in <a href="#">Adding a New Content Record on page 30</a> .
<b>Find</b>	Use this option to search for content records in the selected channel, as described in <a href="#">Searching for Content on page 23</a> .
<b>List</b>	Use this option to list all content records in the selected channel to which you have access (based on your user privileges), as described in <a href="#">Listing Content Records for a Channel on page 22</a> .

## Listing Content Records for a Channel

You can list all of the records that are available to your user role for a selected channel using the List option. The Management Console lists content records using the value of one or more fields specified in the content channel definition. The fields used to create the item titles within the list are called master identifiers.

For each record, the Management Console lists the summary information described in Viewing Content Record Listings.

You can sort the list by various criteria in either ascending or descending order, as described in Sorting Content Records within a List.

If the number of content records exceeds the capacity of the initial page, the Management Console provides links to subsequent pages.

---

**NOTE:** Use the Find option to locate particular records within large collections of content.

---

To list the content records within a selected channel:

- Select the List option for the channel in which you want to add content, for example:



The Management Console displays a new content page, for example:

**Documents**

Solutions Documents Found (3)    All Documents    English    Descending    Sort By Date Modified

	ID	Master Identifier	Status	Ver	Workflow	Modified By	Modified Date
<input type="checkbox"/>	SO1	How do I create a new record?	Published (1.0)	2.0		test user	08/09/2007 11:10 AM
<input type="checkbox"/>	SO3	What is the maximum log file size?	Published (2.0)	2.0		test user	08/09/2007 09:59 AM
<input type="checkbox"/>	SO2	Problem saving new records	Published (2.0)	2.0		test user	08/09/2007 09:58 AM

Select All   Unselect All

Master Document    Translated Document

Locked by you    Locked by someone else

**Add Solutions** >>    -- Apply these changes --    **Apply** >>    **Done** >>

## Searching for Content

---

You can search for content records using either the Find function for the channel on the CONTENT page, or entering a query in the SEARCH page, as described in [SEARCH Page on page 13](#).

The Management Console Find function provides options to search for records based on the content of specified attributes, or using full-text search.

Full-text search matches your search query against the contents of any content record attributes that are available for searching. Attribute-based search restricts matching to only the specified attribute.

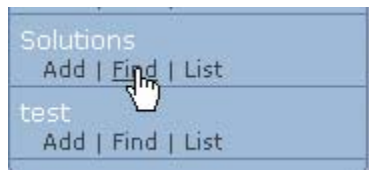
For example, you could use full-text search to locate all content records containing the word `virus` in any attribute. Alternatively, you could use attribute-based searching to locate only content records containing the word `virus` in their title.

The attributes of the content record that are included in full-text and attribute-based searching are specified in the content channel definition as described in [Specifying Search Options for Channel Attributes](#).

In addition, you can restrict results by publishing dates and categories.

To search for content:

- Select the **Find** option for the channel in which you want to locate content, for example:



The Management Console displays a Find page for the selected channel. For example, the first part of the Find page looks like:

## Find Solutions

### Search Specific Criteria

#### Document ID

Enter one or more Document IDs e.g. NE1001 or NE1001+NE1002

#### Search All Attributes

Supports wildcard and boolean searching.

#### Original Author

Enter either the user's first name, last name, or a combination of both.

#### Document Owner

Enter either the user's first name, last name, or a combination of both.

#### Last Modified By

Enter either the user's first name, last name, or a combination of both.

#### Case Number

Enter the exact Case Number. Do not use wildcards.

#### Locale

#### Translation Requests

- ☐ Deutsch
- ☐ English
- ☐ Italiano

The second part of the Find page looks like:

The screenshot shows a search interface with the following sections:

- Lock Status:** A dropdown menu with "Any Status" selected.
- Work Flow:** A dropdown menu with "-- Select a workflow step --" selected.
- Published Status:** A dropdown menu with "Any status" selected.
- Content that starts on or after:** Two input fields for Date and Time (AM/PM).
- Content that ends on or before:** Two input fields for Date and Time (AM/PM).
- Sort By:** A dropdown menu with "Sort By Date Modified" selected.
- Max Records Returned:** A dropdown menu with "100" selected.
- Repository Views\*:** A section with a "+" icon, a checked checkbox for "Demo", and "Top Level" listed below.
- Available Categories:** A list box containing "Bricks", "Glass" (highlighted), and "Wood".
- Selected Categories:** A text area containing "-- No records selected at this time --".
- Available User Groups:** A list box containing "Customer" and "Internal".
- Selected User Groups:** A text area containing "-- No records selected at this time --".
- Matches:** "Matches 3/7" for categories and "Matches 2/2" for user groups.
- Match Options:** Two radio buttons: "Match All of the Selected Categories" (unselected) and "Match Any of the Selected Categories" (selected).
- Buttons:** "Find" and "Cancel" buttons at the bottom right.

The Find <channel> page displays various required and optional form fields.

- Enter the desired search criteria.

---

**NOTE:** If there are more than 100 categories and/or user groups, you will see a search box you can use to locate a subset of the categories or user groups.

---

- Select whether to match **Any** or **All** of the selected search criteria.

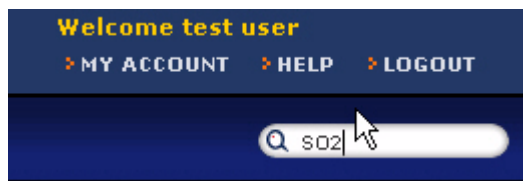
- Select **Find**

The Information Manager displays the search results page, as described in [SEARCH Page on page 13](#).

## Searching for Content by Document ID

---

Every Information Manager content record is associated with an ID. To locate a record by ID, enter the ID of the record in the "magnifying glass" field in the upper right hand corner:



Alternatively, you can use the **Find** option for the channel and enter one or more record IDs separated by '+' signs

### Find Solutions

#### Search Specific Criteria

##### Document ID

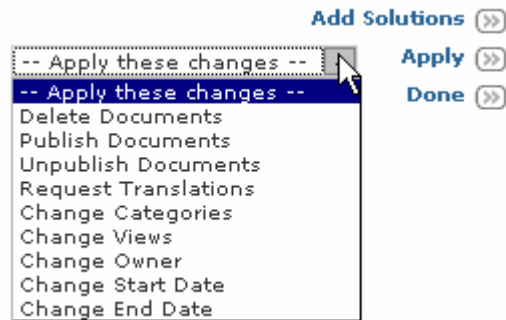
Enter one or more Document IDs e.g. NE1001 or NE1001+NE1002



## Batch Operations on Multiple Records

---

From the document list generated by either a **Find** or **List** on the channel, you can perform batch operations on selected content records simultaneously.



The batch operations are:

Operation	Description
<b>Delete Documents</b>	Delete all selected documents from the channel.
<b>Publish Documents</b>	Publish all selected documents.
<b>Unpublish Documents</b>	Unpublish all selected documents.
<b>Request Translations</b>	Request translations for all selected documents.
<b>Change Categories</b>	Change categories for all selected documents.
<b>Change Views</b>	Change views for all selected documents.
<b>Change Owner</b>	Change the owner of all selected documents.
<b>Change Start Date</b>	Change the start date for all selected documents.
<b>Change End Date</b>	Change the end date all selected documents.

For example, you want to change all records configured for the 'Marketing' view to the 'General' view. To do this:

- Find all content records with the 'Marketing' view.



- Select all of the records returned in the list.
- Select **Change Views**
- Select **Apply**

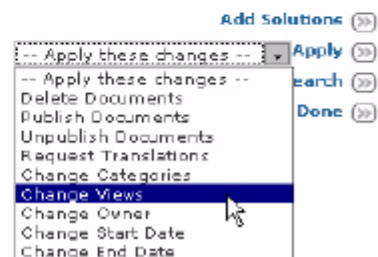
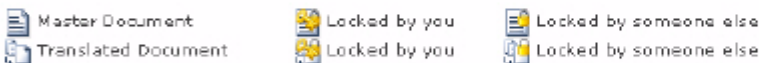
## Documents

Solutions Documents Found (3)

Descending Sort By Date Modified

	ID	Master Identifier	Status	Ver	Workflow	Modified By	Modified Date
<input checked="" type="checkbox"/>	504	How do I log out of IM?	Unpublished	2.1	Review	Super Admin	11/12/2007 10:32 AM
<input checked="" type="checkbox"/>	501	Big problem	Published (2.0)	2.0		Super Admin	11/02/2007 03:00 PM
<input checked="" type="checkbox"/>	503	How do I change the log level for search?	Published (1.0)	1.0		Super Admin	11/02/2007 02:57 PM

Select All Unselect All



- In **Views to Remove**, select Marketing.
- In **Views to Add**, select General.

- Select **Do not create a new version and skip workflow.**

## Change Views

**Important:** This action may affect a large number of documents and can not be undone.

NOTE: Any record which this change would leave without a view will be assigned to the root view.

**Views to Remove**

☐ Demo

- ☐ Engineering
- ☐ General
- ☒ Marketing
- ☐ QA


**Views to Add**


☐ Demo

- ☐ Engineering
- ☒ General
- ☐ Marketing
- ☐ QA

**Options**

☒ Do not create a new version and skip workflow.

**Apply Changes** 

**Cancel** 

## Adding a New Content Record

---

You add content to Information Manager by creating a new record in the appropriate channel and entering required and optional information.

---

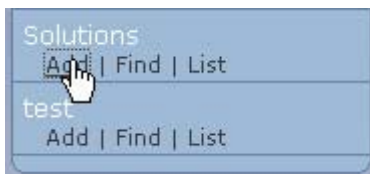
**IMPORTANT:** The Management Console does not automatically save data as you edit fields. You must explicitly save your work using the **Save** option provided on the edit pages. If you select a different task or navigate to another page prior to saving your work, you will lose any unsaved data.

---

When the content record is complete, you can save and review the record, and submit it for approval or publication, depending on the defined workflow and your user role.

To add a content record:

- Select the **Add** option for the channel in which you want to add content, for example:



The Management Console displays the Add Content page for the selected channel, for example:

Add Solutions
Select Locale English

Content Entry Fields

Problem Description

Solution

☐ Remove styles definitions

Repository View Selection \*

☐ Demo

Category Selection

Top Level

**Available Categories**

Bricks
Glass
Wood

Add
Remove

**Selected Categories**

-- No records selected at this time --

Matches 3/7

User Group Selection \*

Top Level

**Available User Groups**

Customer
Internal
Partner

Add
Remove

**Selected User Groups**

-- No records selected at this time --

Matches 3/3

Publishing Options

**Display On**

Date
Time
02/20/2008
04:39
PM

**Remove After**

Date
Time
AM

**Review Date**

Date
Time
AM

Spell Check
Save Document
Cancel

\* Required field

The Add Content page displays various required and optional form fields, which are determined by the content channel definition.

---

**NOTE:** Content channels are defined as part of the Information Manager administration process.

---

Red asterisks (\*) indicate required fields. If you omit required information, the Information Manager displays an error message.

- Enter the required and optional information. See [Filling in Content Record Fields on page 33](#) for an example.
- Select **Save Document**. If no workflow is enabled on the channel, you can optionally select **Save and Publish Document** to publish the record.

The Management Console displays a preview of the new content record as described in [The Content Preview Page on page 37](#).

## Filling in Content Record Fields

---

You add a content record to the Information Manager by entering required and optional information as specified in the content channel definition.

The following example contains information fields defined to create an article in the example Solutions channel shown in the previous section.

- Specify the following required and optional fields:

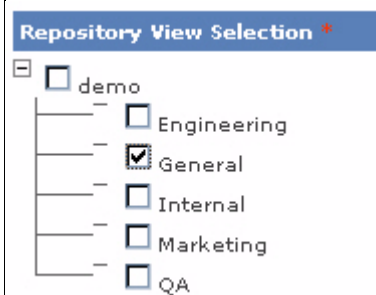
<i>Field</i>	<i>Description</i>
<b>Title</b>	This is an example of a required field in which you enter the record title. This field is used as the Master Identifier for the record, so it will appear in the Master Identifier column in the content list, as shown in <a href="#">Listing Content Records for a Channel on page 22</a> .
<b>Description</b>	<p>This is an example of a field in which you enter the main contents of the record using a rich text editor, called FCKeditor. For details on how to use the FCKeditor, see the <a href="#">FCKeditor User Guide</a> and check out the <a href="#">demo</a>. For troubleshooting problems, see <a href="#">FCKeditor Troubleshooting</a>.</p> <p>The example field contains text formatting functions which you can use to add inline formatting to the content. This formatting is independent of, and intended to be complimentary to, any formatting that the web client will impose on the content.</p> <hr/> <p><b>NOTE:</b> The available editing and formatting functions are specified in the channel definition on an individual field basis, as described in <a href="#">Specifying a Channel Schema</a> in the <a href="#">Information Manager Administration Guide</a>.</p> <hr/>

## Repository View Selection

This field enables you to select the views through which the content record can be accessed on the Management Console. Users without corresponding views cannot access the content record.

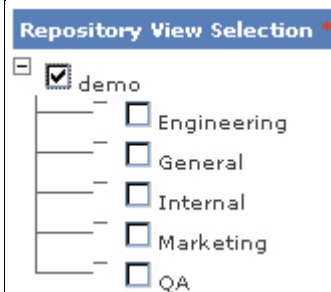
When working with a view hierarchy, it is important to understand that selecting a view higher up in the hierarchy excludes users assigned the views lower in the hierarchy from accessing the content record.

Consider the following view hierarchy:




In this example, users assigned either the demo or the General view can access the content record.

In contrast, if only the demo view was selected for the content record, then only users assigned the demo view can access the content record.





<b>Category Selection</b>	<p>This field lists content categories and sub-categories to associate with this record. For example, you could specify that this record is relevant to the Products or Services categories, or any number of their sub-categories.</p> <p>If there are more than 100 categories, you will see a search box you can use to locate a subset of the categories.</p> <hr/> <p><b>NOTE:</b> Unlike the View Selection described above, selecting a category automatically includes any sub-categories.</p> <hr/>												
<b>User Group Selection</b>	<p>This field lists which user groups can view the content record in the web client.</p> <p>If there are more than 100 user groups, you will see a search box you can use to locate a subset of the user groups.</p>												
<b>Publishing Options</b>	<p>These fields specify valid publication dates for the content record, for example:</p> <div><p><b>Publishing Options</b></p><hr/><table><tr><td><b>Display On</b></td><td></td><td><b>Remove After</b></td><td></td></tr><tr><td><b>Date</b></td><td><b>Time</b></td><td><b>Date</b></td><td><b>Time</b></td></tr><tr><td>12/20/2004</td><td>05:27 PM</td><td></td><td>AM</td></tr></table></div> <p><b>Display On</b> specifies the initial date and time that the record will be available to web site users. The Management Console uses the current date and time as the default.</p> <p><b>Remove After</b> specifies the final date and time that the record will be available to web site users; however the record will still remain in the repository and can be re-activated by changing the publishing dates.</p> <p><b>Review Date</b> specifies the date the content is to be flagged for review.</p> <hr/> <p><b>NOTE:</b> The Information Manager contains a setting for default number of days, which sets the expiration date for a content record relative to its creation date.</p> <hr/>	<b>Display On</b>		<b>Remove After</b>		<b>Date</b>	<b>Time</b>	<b>Date</b>	<b>Time</b>	12/20/2004	05:27 PM		AM
<b>Display On</b>		<b>Remove After</b>											
<b>Date</b>	<b>Time</b>	<b>Date</b>	<b>Time</b>										
12/20/2004	05:27 PM		AM										

<b>Priority/Order</b>	<p>This example field specifies a numerical ranking value for this item that will influence its position in a list of web search results:</p> 
-----------------------	---

## Creating a New Content Record from an Existing Record

You can create a new content record from an existing record by editing the existing record and selecting **Save as New**:



Information Manager creates a duplicate of the existing record and assigns it a new Document ID.

# The Content Preview Page

The Management Console displays the preview page when:

- You save a new or modified content record
- You select a content record as part of a workflow approval process

The following preview page is an example of the FAQ example specified in [Filling in Content Record Fields on page 33](#):

The screenshot shows the INQUIRA Information Manager interface. The top navigation bar includes 'INBOX', 'CONTENT' (highlighted), 'FEEDBACK', 'USERS', 'REPOSITORY', and 'TOOLS'. A search bar on the right contains 'Doc ID'. The main content area is titled 'Preview Solutions' and is divided into two sections: 'Content Entry Fields' and 'Meta Data Entry Fields'. The 'Content Entry Fields' section includes a 'Title' field with the text 'How do I delete a content record?' and a 'Description' field with the text 'List the contents of the channel; select the document from the list, and select Delete Documents from the pull-down menu on the bottom of the page.' The 'Meta Data Entry Fields' section is currently empty. On the right side, there is a 'Properties' panel with tabs for 'Info' and 'Feedback'. The 'Info' tab is active, showing fields for 'Displayed' (Version 1.1), 'Published' (Version 1.0), 'Master Locale' (English), and 'Document ID' (504). Below these are 'Valid Display Dates' (Starting 08/09/2007 12:55 PM, Through 08/09/2007 12:55 PM), 'Views' (General), 'User Groups' (Public, Partner, Internal Only), and 'Priority/Order' (None). At the bottom of the 'Properties' panel are buttons for 'Edit Document', 'Edit Meta Data', 'Check Out', and 'Done'. Below the 'Properties' panel is a 'Workflow' section showing 'Status: Edited', 'By: test user', 'On: 08/09/2007 03:05 PM', 'Current Step: Author', and 'Assigned to: test user'. There is a 'Your Comments' section with a text area and an 'Add comment' button. At the bottom right, there is a 'Notification set for' section with the date '08/11/2007 03:05 PM' and buttons for 'Change Data' and 'Approve'.

The example preview page displays the following information about the content record:

- The content section, as described in [The Content Section of the Preview Page on page 38](#).
- The Content Data section, as described in [The Content Data Section of the Preview Page on page 40](#).

- The Workflow section (if applicable), as described in *The Workflow Section of the Preview Page on page 45*.

The preview screen does not format the content as it will be displayed in the web client. The formatting in the web client is controlled by presentation templates.

---

**NOTE:** The Management Console also displays the preview page when you select the record as part of a content approval step within a workflow process.

---

## The Content Section of the Preview Page

---

The preview page displays the content that you entered for all the defined fields in the channel, for example:

### Preview Solutions

#### Content Entry Fields

**Title**

How do I delete a content record?

**Description**

List the contents of the channel; select the document from the list, and select Delete Documents from the pull-down menu on the bottom of the page.

#### Meta Data Entry Fields

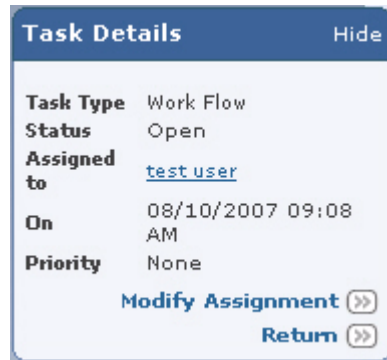
**Additional Keywords**

remove record

## The Task Details

---

When a record is in a workflow, a Task Details section appears in the record preview page for users assigned the workflow task.



The screenshot shows a 'Task Details' panel with a blue header and a 'Hide' button. The panel contains the following information:

- Task Type:** Work Flow
- Status:** Open
- Assigned to:** [test user](#)
- On:** 08/10/2007 09:08 AM
- Priority:** None

At the bottom of the panel are two buttons: 'Modify Assignment' and 'Return', both with right-pointing arrows.

Attribute	Description
<b>Task Type</b>	This field displays the type of task. See <a href="#">Action and Notification Tasks on page 68</a> for the list of task types.
<b>Status</b>	This field displays the current status of the record, such as <b>Open</b> , <b>Closed</b> , ???
<b>Assigned to</b>	<p>This field displays the name of the user to which the current workflow task is assigned. User with the proper permissions can click on the named user to access the <b>Task Assignment</b> page and assign the task to another user.</p> <p><b>Note:</b> When assigning a workflow task to a user, only users with permission to perform the particular workflow task will appear in the <b>User</b> pulldown menu in the <b>Task Assignment</b> page. Contact your Information Manager administrator if your are unable to assign the task to the correct user.</p>
<b>On</b>	Date and time the task was assigned to the user.
<b>Priority</b>	The priority (None, Low, Medium, or High) given to the task. By the user who assigned the task.

<b>Modify Assignment</b>	Select to access the <b>Task Assignment</b> page and assign the task to another user.
<b>Return</b>	Select to go back to the previous page.

## The Content Data Section of the Preview Page

The Content Data section of the preview page is divided into tabs that display information:

<b>Properties</b>	See <a href="#">Content Properties on page 40</a>
<b>Info</b>	See <a href="#">Content Info on page 42</a>
<b>Feedback</b>	See <a href="#">Content Feedback on page 44</a>

### Content Properties

Select the **Properties** tab to view the properties of the content record, or to check out or modify the content record:

The screenshot shows the 'Properties' tab selected in a preview page. The interface has three tabs: 'Properties' (active), 'Info', and 'Feedback'. The 'Properties' tab displays the following information:

- Displayed:** Version 1.1
- Published:** Version 1.0
- Master Locale:** English
- Document ID:** S04
- Valid Display Dates:**
  - Starting 08/09/2007 12:55 PM
  - Through Open
- Views:** General
- User Groups:**
  - Public
  - Partner
  - Internal Only
- Priority/Order:** None

At the bottom of the tab, there are four buttons with right-pointing arrows:

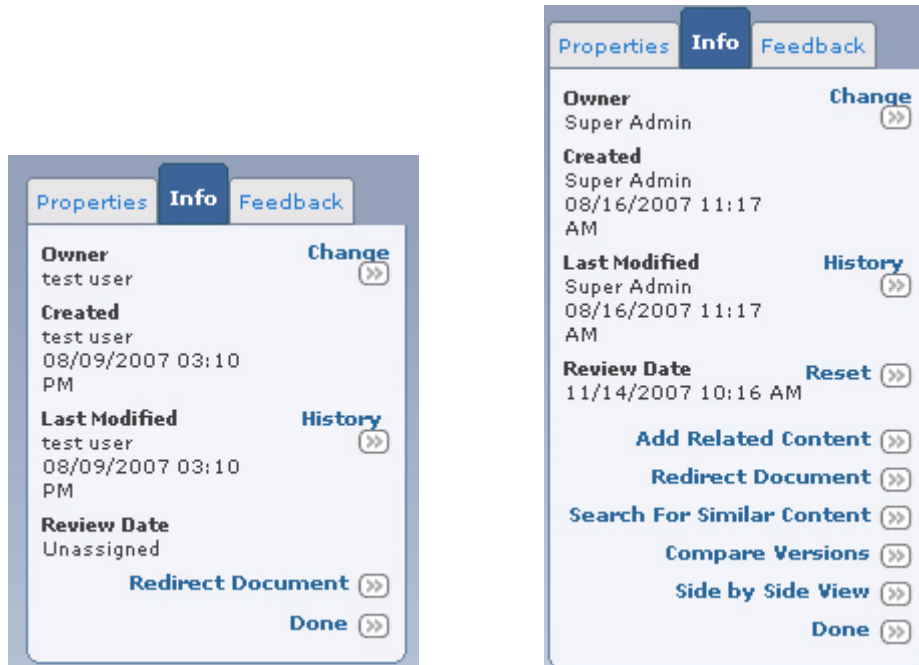
- Edit Document
- Edit Meta Data
- Check Out
- Done

<b>Attribute</b>	<b>Description</b>
<b>Displayed</b>	This field displays the current version level of the content record. See <a href="#">Viewing Content History on page 49</a> for more information on how the Information Manager manages content versions.
<b>Published</b>	This field displays the level of the published version of this record, if applicable.
<b>Master Locale</b>	The original language used to author the content record.
<b>Document ID</b>	The document ID of the content record.
<b>Valid Display Dates</b>	<p>This field displays the dates between which this content record is available for publishing. The Information Manager administrator can set an optional default number of days that a content record is valid, which automatically sets the end date relative to the initial publishing date for the record.</p> <p>Content authors and editors can be override the default by specifying explicit publishing date attributes for individual content records.</p> <p>Records that have no default or explicit publishing dates will never expire.</p>
<b>Views</b>	This field lists any repository views to which this record is assigned. The Information Manager administrator assigns content to repository views on the basis of the content channel definition. See Repository Views for more information about repository views.
<b>User Groups</b>	This field lists the views associated with the content record.
<b>Priority/Order</b>	<p>This field lists the priority value assigned to this record. Authors and editors can assign a priority value to a record to influence its position in a list of records returned by a runtime request, for example in a list of articles generated by a search on your web site.</p>
<b>Edit Document</b>	Select to edit the content record, as described in <a href="#">Modifying Existing Content on page 46</a> .
<b>Edit Meta Data</b>	Select to add or edit the record meta data. The meta data will appear in the content preview page but not in the content displayed in the web client.
<b>Check Out</b>	Select to lock the record and prohibit other users from editing the record.

<b>Done</b>	Select when finished to return to the previous Management Console page.
-------------	---


## Content Info

Select the **Info** tab to view or modify the authoring information associated with the content record:



<i>Attribute</i>	<i>Description</i>
<b>Owner</b>	This field displays the original author of the content record. Select <b>Change</b> to change the content record owner.
<b>Created</b>	This field displays the date the content record was created.
<b>Last Modified</b>	This field displays the user and date for the last update to the content record. Select <b>History</b> to view each edit made to the document, as described in <a href="#">Viewing Content History on page 49</a> .
<b>Review Date</b>	This field displays the review date, if set in the content record.
<b>Add Related Content</b>	Select to associate this record with one or more other records. See <a href="#">Related Content Records on page 51</a> .
<b>Redirect Document</b>	Select to re-direct links to this record to a superseding record. See <a href="#">Redirecting Content Records on page 53</a> for details.



<b>Search For Similar Content</b>	<p>Select to search Information Manager for another content records. This is simply a shortcut to the Search page accessed via the SEARCH tab. See <a href="#">Searching for Content on page 23</a> for details.</p>
<b>Compare Versions</b>	<p>Select to display the differences between the current version of the record and a previous version. The differences between the records are displayed as editorial deletes and inserts.</p>  <p>See <a href="#">Comparing Record Versions on page 56</a> for more information.</p>
<b>Side by Side View</b>	<p>Compare selected versions of the record, side-by-side.</p> <p>See <a href="#">Comparing Record Versions on page 56</a> for more information.</p>
<b>Done</b>	<p>Select when finished to return to the previous Management Console page.</p>

## Content Feedback

Select the **Feedback** tab to view or modify comments and case links associated with the content record:



Attribute	Description
<b>Content Metrics</b>	This field displays default and custom content metrics associated with the channel definition:  Count: the number of times that this content record was requested by the application in response to a query.  Accessed: the number of times end-users accessed this content.
<b>Case Links</b>	This field displays all of the cases linked to this content record.
<b>Reuse Count</b>	This field displays the sum of case links for this content record.
<b>Document Value</b>	This field displays the sum of all incident values associated with the case link. Each case can have a value associated with it and be updated when linking the solution to the case. If incident values are not provided, then the Document Value = Reuse Count.
<b>Manage Case Links</b>	Select to associate this record with a specific case. See <a href="#">Linking Cases to Content Records on page 59</a> for details.
<b>Add Recommendation</b>	Select to add a comment on the content record. See <a href="#">Recommending Content</a> for details.

## The Workflow Section of the Preview Page

---

The Workflow section of the preview page displays information about the workflow process defined for the channel, and the current status of the record.

**Workflow**

Status Created  
By test user  
On 08/09/2007 04:47 PM  
Current Step Author  
Assigned to test user

Your Comments

Add comment >>

Notification set for  
08/11/2007 04:47 PM  
Change Date >>  
Approve >>

Attribute	Description
Status	This field displays the current status of the record, such as <b>Created, Edited, ????</b>
By	This field displays the name of the last user to update the record.
On	This field displays the date the record was last updated.
Current Step	This field displays the current workflow step. For example, the step <b>Author</b> indicates that the record has been created and is ready to be approved by the author to advance to the next step in the workflow.

<b>Assigned to</b>	<p>This field displays the name of the user to which the current workflow task is assigned, or <b>Unassigned</b> if the task is not yet assigned to a user. User with the proper permissions can click on the named user to access the <b>Task Assignment</b> page and assign the task to another user.</p> <p><b>Note:</b> When assigning a workflow task to a user, only users with permission to perform the particular workflow task will appear in the <b>User</b> pulldown menu in the <b>Task Assignment</b> page. Contact your Information Manager administrator if your are unable to assign the task to the correct user.</p>
<b>Your Comments</b>	This field allows you to add comments for the user performing the next step in the workflow. These comments will appear along with the task in the user's INBOX.
<b>Notification set for</b>	[Confirm this...] Displays the date/time for Information Manager to send the next workflow task notification email to the assigned user, if no action is taken on the task before that date. Select <b>Change Date</b> to change the notification date and time.
<b>Approve</b>	Select to approve this workflow task and advance the record to the next step in the workflow.

## Modifying Existing Content

You modify existing content records by locating the desired record, editing the record, and saving your changes.

When you save a modified record, the Management Console displays the preview page as described in *Reviewing Content*, which you can use to review the record and submit it for approval or publication, depending on your user role and the defined workflow.

**IMPORTANT:** The Management Console does not automatically save data as you edit fields. You must explicitly save your work using the <tb> Save option provided on the edit pages. If you select a different task or navigate to another page prior to saving your work, you will lose any unsaved data.

To edit a content record:

- Select the record of interest from a list, a task list, or a list of search results

The content Preview page displays.

- Select the **Edit** option from the Content Properties section of the Preview page:

**Content Properties**

<b>Displayed</b>	Version 1.1
<b>Published</b>	None

**Last Modified** [History](#)

Super Admin  
04/07/2005 01:33 PM

**Valid Display Dates**  
Starting 04/07/2005 01:13 PM  
Through Open

<b>Content Metrics</b>		
<b>Metric</b>	<b>Count</b>	<b>Accessed</b>
Impressions	0	None

**Views**  
Demo

**Categories**  
Services  
Products

**User Groups**  
InQuira User Group

[Edit](#)   
[Done](#)

The Management Console displays the Edit Content page.

The Edit Content page displays the various required and optional form fields, which are determined by the content channel definition. See [Filling in Content Record Fields on page 33](#) for an example of adding information to a content record.

- Enter the required and optional information
- Select **Save Only**

The Information Manager displays a preview of the new content record, as described in [The Content Section of the Preview Page on page 38](#)

# Invalid Characters

---

Some special characters are removed from Information Manager records during the save process. These characters are the Hexidecimal versions of the unicode characters.

Characters between the following ranges are removed:

0x00 and 0x08 (Control Characters --> NUL, SOH, STX, ETX, EOT, ENQ, ACK, BEL, BS)

0x0B and 0x1F (Control Characters --> CR, SO, SI, DLE, DC1, DC2, DC3, DC4, NAK, SYN, ETB, CAN, EM, SUB, ESC, FS, GS, RS, US)

The following characters are invalid:

0x7F and 0x84  
0x86 and 0x9F  
0xFDD0 and 0xFDDF  
0x1FFFE and 0x1FFFF  
0x2FFFE and 0x2FFFF  
0x3FFFE and 0x3FFFF  
0x4FFFE and 0x4FFFF  
0x5FFFE and 0x5FFFF  
0x6FFFE and 0x6FFFF  
0x7FFFE and 0x7FFFF  
0x8FFFE and 0x8FFFF  
0x9FFFE and 0x9FFFF  
0xAFFFE and 0xAFFFF  
0xBFFFE and 0xBFFFF  
0xCFFFE and 0xCFFFF  
0xDFFFE and 0xDFFFF  
0xEFFFE and 0xEFFFF  
0xFFFFE and 0xFFFFF  
0x10FFFE and 0x10FFFF

# Viewing Content History

---

You can view the history of a content record using the Content History page. Authorized users can delete history information.

The history page displays:

- The date and time the record was saved
- The users who have saved each version of a record
- The record version. The record version is incremented by a tenth (or dot value) each time it is edited. Each time the record is published, it is incremented by one.
- The workflow step at which the record was saved
- Comments entered during the workflow approval process

## Content History

Content History Records Found (7)

English

Date	User	Ver	Action	Workflow	Comments	
08/10/2007 02:01 PM	Other User	1.0	Published			<a href="#">View</a> >>
08/10/2007 02:01 PM	Other User	0.2	Approved	Publish	Looks good	<a href="#">View</a> >>
08/10/2007 02:00 PM	Other User	0.2	Approved	Review		<a href="#">View</a> >>
08/10/2007 02:00 PM	Other User	0.2	Edited	Author		<a href="#">View</a> >>
08/10/2007 01:59 PM	Other User	0.1	Rejected	Author	Please clarify this operation occurs in the Content tab.	<a href="#">View</a> >>
08/10/2007 01:01 PM	test user	0.1	Approved	Review		<a href="#">View</a> >>
08/09/2007 04:47 PM	test user	0.1	Created	Author		<a href="#">View</a> >>

[Delete Content History](#) >>  
[Done](#) >>

## Reverting a Content Record to a Previous Version

---

You can revert a content record to any previous version displayed in the history list described in [Viewing Content History on page 49](#).

- Select a version of the content record from the list in the Content History page.
- Go to the Properties tab and select **Revert to this version:**

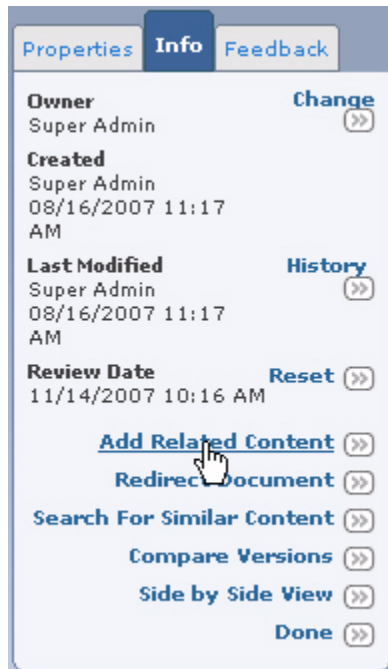
Properties	Info	Feedback
<b>Displayed</b>	Version 1.1	
<b>Published</b>	<u>Version 3.0</u>	
<b>Master Locale</b>	English	
<b>Document ID</b>	S2482	
<b>Categories</b>		
Reference Guide		
Application Development		
Configuration		
Information Manager		
Installation		
8.1		
<b>Valid Display Dates</b>		
Starting 08/26/2008 09:41 AM		
Through Open		
<b>Views</b>		
General		
<b>User Groups</b>		
Customers		
Internal		
Partners		
<a href="#">Revert to this Version</a> >>		
<a href="#">Bypass Workflow / Publish</a> >>		
<a href="#">Place In Workflow</a> >>		
<a href="#">Check Out</a> >>		
<a href="#">Done</a> >>		



## Related Content Records

---

You can associate a record with one or more other records. To associate the current record with other records, select **Add Related Content**:



This will bring up a Find Alias Target page. Enter text and/or other attributes to locate the desired content records, select the records from the returned list, and select **Related Selected Records**.

## Find Alias Target in Solutions

### Search Specific Criteria

#### Search All Attributes

Supports wildcard and boolean searching.

#### Original Author

Enter either the user's first name, last name, or a combination of both.

#### Document Owner

Enter either the user's first name, last name, or a combination of both.

#### Last Modified By

Enter either the user's first name, last name, or a combination of both.

#### Case Number

Enter the exact Case Number. Do not use wildcards.

#### Locale

#### Lock Status

#### Workflow

#### Work Teams

#### Published Status

#### Content that starts on or after

Date	Time
<input type="text"/>	<input type="text" value="AM"/>

#### Content that ends on or before

Date	Time
<input type="text"/>	<input type="text" value="AM"/>

#### Sort By

#### Max Records Returned

#### Top Level

##### Available Categories

<input type="checkbox"/> Products	<a href="#">Add</a>
<input type="checkbox"/> Topics	<a href="#">Add</a>

##### Selected Categories

-- No records selected at this time --

- ☐ Match All of the Selected Categories  
☒ Match Any of the Selected Categories

[Find](#)   
[Cancel](#) 

The related content records then appear in the content data section of the preview page:

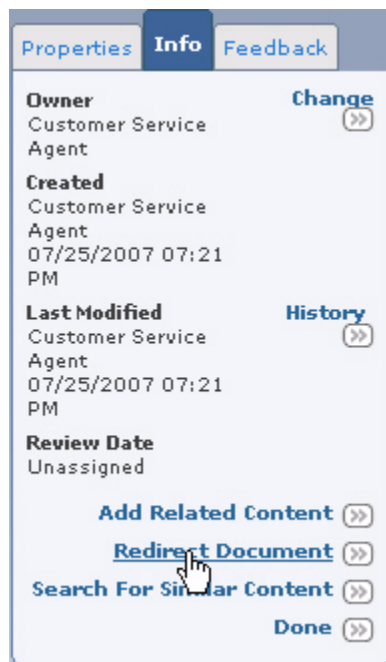


## Redirecting Content Records

---

When a record is made obsolete by a newer, similar record, you can redirect links created to the old record to the new record. Though the old record is still available through the Management Console, only the redirected-to record appears in the search results on the client. This redirection is done on the Information Manager client through the Information Manager tag library and is external to the Management Console.

To redirect from an old to a new record, preview the old record and select **Redirect Document** from the Info portion of the content data section:



This will bring up a Find Alias Target page. Enter text and/or other attributes to locate the newer content record, select the record from the returned list, and select **Redirect to selected record**.

## Find Alias Target in Solutions

**Search Specific Criteria**

**Search All Attributes**  
  
Supports wildcard and boolean searching.

**Original Author**  
  
Enter either the user's first name, last name, or a combination of both.

**Document Owner**  
  
Enter either the user's first name, last name, or a combination of both.

**Last Modified By**  
  
Enter either the user's first name, last name, or a combination of both.

**Case Number**  
  
Enter the exact Case Number. Do not use wildcards.

**Locale**  
English ▾

**Lock Status**  
Any Status ▾

**Workflow**  
-- Select a workflow step -- ▾

**Work Teams**  
-- Select a work team -- ▾

**Published Status**  
Any status ▾

**Content that starts on or after**  
Date  Time  AM ▾

**Content that ends on or before**  
Date  Time  AM ▾

**Sort By**  
Sort By Date Modified ▾

**Max Records Returned**  
100 ▾

**Top Level**

**Available Categories**  

Products Add

Topic Add

**Selected Categories**  
-- No records selected at this time --

☐ Match All of the Selected Categories  
☒ Match Any of the Selected Categories

Find Cancel

The redirected-to content record then appears in the content data section of the preview page:

Properties

Info

Feedback

**Owner**  
Customer Service  
Agent

**Change**  
>>

**Created**  
Customer Service  
Agent  
07/25/2007 07:21  
PM

**Last Modified**  
Customer Service  
Agent  
07/25/2007 07:21  
PM

**History**  
>>

**Review Date**  
Unassigned

**Add Related Content** >>

**Redirected To** S71

**Reassign Redirection** >>

**Clear Redirection** >>

**Search For Similar Content** >>

**Done** >>

## Comparing Record Versions

---

Each time a record is edited or published, a new version of the record is created. The record version number is incremented by a tenth (or dot value) each time it is edited. Each time the record is published, it is incremented by one.

You can compare versions of a record by selecting **Compare Versions** in the Info portion of the content data section of the previous page:



The latest version of the record is displayed in the Compare Versions page. In the upper right hand corner of the page, select the an earlier version of the record to compare. Text that was added since the previous version is shown underlined in green and text that was deleted is shown with a strike through in red:

Compare Versions

Between 2.0 And 

1.0

Content Entry Fields

Title

Does IM track content records that get deleted?

Solution

When a content record gets deleted from IM, the record gets deleted from the database. ~~The only place where deletions get~~ Deletions are tracked in the <IM\_HOME>/logs/IMADMIN/audit/content log ~~is~~ files. The information included in the logfile ~~info~~ does not contain the content of the record. Below is an example ~~record~~, but there might be some useful info that you could use. The type field describes what was done to the record. The number 2 identifies this record as being deleted. There is also a "documentid" field that contains the doc ID.

Legend at the top of the audit log:

```
CREATETIMESTAMP|TYPE|USERGUID|USERLOGIN|CONTENTTEXT|PUBGUID|CONTENTTEXTGUID|CONTENTGUID|CONTENTCHANNELREFKEY|LOCALBGUID|MAJORVERSION|MINORVERSION|REPOSITORYGUID|REPOSITORYRE|PADDRESS|SESSIONID|DOCUMENTID|DOCUMENTOWNERID|DISPLAYSTARTDATE|DISPLAYENDDATE|MASTE
```

Example of a log entry:

```
118364221329q2|1921681235663a2-ed25809901-7f5d|SUPER|0027639bf011e1d7a787007f*3|0027639bf011e1d7a787007f|0014912922f6011100ee8ed007feq|TEST|C6153CB5-5200-41AC-B4AA-0DFA167AB173|1|0027e33e180110eafeF3ad007feq|j2cdVLeoMZkQSWCpntpvSg|TCQ|1921681235663a2-ed25809901-7f5d|2007-04-11 19:26:00 Etc/GMT|Words with a - dash, 'single' "double" quotes
```

You can select **Side by Side View** to view the versions side-by-side:

Side by Side View

English Version 

1.0

Content Entry Fields

Title

Does IM track content records that get deleted?

Solution

When a content record gets deleted from IM, the record gets deleted from the database. The only place where deletions get tracked is in the <IM\_HOME>/logs/IMADMIN/audit/content log files. The info included in the logfile does not contain the content of the record, but there might be some useful info that you could use. Below is an example of what the entries look like. The type field describes what was done to the record. The number 2 identifies this record as being deleted. There is also a "documentid" field that contains the doc id.

Legend at the top of the audit log:

```
CREATETIMESTAMP|TYPE|USERGUID|USERLOGIN|CONTENTTEXT|P|CONTENTCHANNELREFKEY|LOCALBGUID|MAJORVERSION|MINOR|PADDRESS|SESSIONID|DOCUMENTID|DOCUMENTOWNERID|DISPL
```

Example of a log entry:

```
118364221329q2|1921681235663a2-ed25809901-7f5d|SUPER|0027639bf011e1d7a787007f*3|0027639bf011e1d7a787007f|0014912922f6011100ee8ed007feq|TEST|C6153CB5-5200-41AC-B4AA-0DFA167AB173|1|0027e33e180110eafeF3ad007feq|j2cdVLeoMZkQSWCpntpvSg|TCQ|1921681235663a2-ed25809901-7f5d|2007-04-11 19:26:00 Etc/GMT|Words with a - dash, 'single' "double" quotes
```

English Version 2.0

Content Entry Fields

Title

Does IM track content records that get deleted?

Solution

When a content record gets deleted from IM, the record gets deleted from the database. Deletions are tracked in the <IM\_HOME>/logs/IMADMIN/audit/content log files. The information included in the logfile does not contain the content of the record. Below is an example of what the entries look like. The type field describes what was done to the record. The number 2 identifies this record as being deleted. There is also a "documentid" field that contains the doc ID.

Legend at the top of the audit log:

```
CREATETIMESTAMP|TYPE|USERGUID|USERLOGIN|CONTENTTEXT|P|CONTENTCHANNELREFKEY|LOCALBGUID|MAJORVERSION|MINOR|PADDRESS|SESSIONID|DOCUMENTID|DOCUMENTOWNERID|DISPL
```

Example of a log entry:

```
118364221329q2|1921681235663a2-ed25809901-7f5d|SUPER|0027639bf011e1d7a787007f*3|0027639bf011e1d7a787007f|0014912922f6011100ee8ed007feq|TEST|C6153CB5-5200-41AC-B4AA-0DFA167AB173|1|0027e33e180110eafeF3ad007feq|j2cdVLeoMZkQSWCpntpvSg|TCQ|1921681235663a2-ed25809901-7f5d|2007-04-11 19:26:00 Etc/GMT|Words with a - dash, 'single' "double" quotes
```

## Deleting Content from the Information Manager

---

You can delete content records from the Information Manager by generating a list of records, selecting the record or records to be deleted, and then selecting **Delete Documents** from the pull down menu in the lower right hand section of the page.

### Documents

Solutions Documents Found (3) Documents | Last Modified English Descending Sort By Date Modified

	ID	Master Identifier	Status	Ver	Workflow	Modified By	Modified Date
<input type="checkbox"/>	S88	Does IM track content records that get deleted?	Published (2.0)	2.0		test user	08/21/2007 11:21 AM
<input type="checkbox"/>	S86	New record	Published (2.0)	2.0		test user	08/21/2007 10:59 AM
<input checked="" type="checkbox"/>	S85	Old Record	Redirected	1.0		test user	08/20/2007 01:51 PM

Select All Unselect All

Master Document Locked by you Locked by someone else  
 Translated Document Locked by you Locked by someone else

Add Solutions >> Apply >> Done >>

-- Apply these changes --

Delete Documents

Publish Documents

Unpublish Documents

Request Translations

Change Categories

Change Owner

Change Start Date

Change End Date

---

**IMPORTANT:** If a record has external resources such as images or other binary files associated with it, deleting the content record will also remove the external resources from the server.

---

---

**NOTE:** The Delete option is not intended for managing content publication. You can remove content from publishing using the publishing dates in the channel definition. The delete option is not intended for managing content publication.

---

When a content record gets deleted from Information Manager, the record gets deleted from the database. Deletions are tracked in the <IM\_HOME>/logs/IMADMIN/audit/content log files. The information included in the logfile does not contain the content of the record. Below is an example of what the entries look like. The type field describes what was done to the record. The number 2 identifies this record as being deleted. There is also a "documentid" field that contains the doc ID.



Legend at the top of the audit log:

CREATETIMESTAMP|TYPE|USERGUID|USERLOGIN|CONTENTTEXT|PUBGUID|CONTENTT  
EXTGUID|CONTENTGUID|CONTENTCHANNELGUID|CONTENTCHANNELREFKEY|LOCALE  
GUID|MAJORVERSION|MINORVERSION|REPOSITORYGUID|REPOSITORYREFKEY|WORK  
FLOWSTEPGUID|  
IPADDRESS|SESSIONID|DOCUMENTID|DOCUMENTOWNERID|DISPLAYSTARTDATE|DISP  
LAYENDDATE|MASTERIDENTIFIER

Example of a log entry:

1183642213296|2|1921681235663a2-ed25809901-  
7f5d|SUPER||0027639bf10111e1d7a787007fe8|0027639bf10111e1d7a787007fe9|  
0014912922f6011100ee8edf007fef|TEST|C6153CB5-5200-41AC-B4AA-  
0DFA167AB175|1|0|0027e33e180110cafe3ad007fe9|TEST73||127.0.0.1  
|r2cIVLnoMZkQSWOpntpvSg|TO2|1921681235663a2-ed25809901-7f5d|2007-04-11 19:26:00  
Etc/GMT||Words with a - dash, single ' double " quotes

## Linking Cases to Content Records

---

You can associate a record with specific cases in an external bug tracking or CRM system. To associate cases with a record, select **Manage Case Links** from the Feedback portion of the data content section of the preview page:



An External Case Links page is displayed, where you can add a case number and description:

## External Case Links

**Add New Case**

Enter a case number to assign below

Case Number\*

Description

[Assign New Case](#) >>  
[Done](#) >>

When you are finished linking cases to the record, select **Done**. The cases are then displayed in the Feedback portion of the data content section of the preview page:

Properties		Info	Feedback
Content Metrics			
Metric	Count	Accessed	
Impressions	0	08/21/2007	
Case Links			
Case Number			Value
10244			1
32451			1
Reuse Count			2
Document Value			2
Manage Case Links			>>
Add Recommendation			>>

# Recommending Content

---

Information Manager allows users to recommend what content should be added in the future. To recommend that content be added to the application, select **Add Recommendation** from the record preview page:



Alternatively, you can select **Feedback** from the navigation area:



The Management Console displays the Feedback Management page.

- Select the **Add** option under Recommendations:



The Management Console displays the Manage Content Recommendations page:

## Manage Content Recommendations

Submit Content Recommendation

Title\*

Description

Source

**B**

*I*

U

abc

x<sub>2</sub>

x<sup>2</sup>

☐ Remove styles definitions

Case Number

Select Locale

English

Select the content channel this document will use\*

None

Priority

None

Save Content Recommendation

Cancel

- Specify the following parameters:

<b>Title</b>	Specify a title for the recommendation.
<b>Description</b>	Enter any descriptive information to assist the content author in providing the appropriate content.
<b>Case Number</b>	Specify an incident or case identifier if applicable.
<b>Select Content Channel</b>	Select the relevant content channel for the new content, if applicable. The Management Console will display the available content categories for the selected channel.
<b>Available Categories</b>	Select the categories that this content should be assigned to.
<b>Priority</b>	Specify an optional priority (Low, Medium, or High) for this recommendation.

## Listing Recommended Content

---

To view the list of recommendations, select **List**:



The list of recommendations is displayed:

### Manage Content Recommendations

Content Recommendations(3)

Display English

		Case #	Recommended Title	Document ID	Priority	Status	Requested by	Created	Actions
1.	<input type="checkbox"/>	12532	<a href="#">Can't find the log files</a>		Medium	New	Author Author	08/22/2007 04:26 PM	<a href="#">Perform</a> >>
2.	<input type="checkbox"/>	12853	<a href="#">Need to document repository merge feature</a>		None	New	Author Author	08/22/2007 04:25 PM	<a href="#">Perform</a> >>
3.	<input type="checkbox"/>	12221	<a href="#">Need more detail on recommending content</a>		None	New	Author Author	08/22/2007 04:23 PM	<a href="#">Perform</a> >>

[Select All](#) [Unselect All](#)

[Delete Selected Content Recommendations](#) >>

[Add Content Recommendation](#) >>

## Finding Recommended Content

---

You can search for recommendations by selecting **Find** under Recommendations:



This displays the Find Content Recommendations page:

## Find Content Recommendations

Find Entry Fields

Case Number

12532

Content Channels

☐ FAQs

☐ Policy

☐ Solutions

Requested by

-- Select One --

Completed by

-- Select One --

Priority

-- Select One --

Recommend Status

-- Select One --

Find Recommendations

cancel

<b>Case Number</b>	Locate the recommendations associated with a specific incident or case identifier.
<b>Content Channels</b>	Locate the recommendations associated with a specific content channel.
<b>Requested by</b>	Locate the recommendations created by a specific user.
<b>Completed by</b>	Locate the recommendations completed by a specific user. A completed recommendation is one from which a new record is created. See <a href="#">Completing a Recommendation on page 65</a> for details.
<b>Priority</b>	Select to specify the priority for the recommendation: none, low, medium, or high.
<b>Recommended Status</b>	Select to describe the status of the recommendation. These include New, various forms of Rejected, Content Created and Content Modified.

The records matching the Find are displayed in the list:

## Manage Content Recommendations

Content Recommendations(1) Display English ▾

	Case #	Recommended Title	Document ID	Priority	Status	Requested by	Created	Actions
1. <input type="checkbox"/>	12532	<a href="#">Can't find the log files</a>		Medium	New	Author Author	08/22/2007 04:26 PM	<a href="#">Perform</a> ⌵

[Select All](#) [Unselect All](#)

[Delete Selected Content Recommendations](#) ⌵  
[Add Content Recommendation](#) ⌵

## Completing a Recommendation

To create a record in response to a recommendation, list the recommendation and select **Perform**:

## Manage Content Recommendations

Content Recommendations(2) Display English ▾

	Case #	Recommended Title	Document ID	Priority	Status	Requested by	Created	Actions
1. <input type="checkbox"/>	12532	<a href="#">Can't find the log files</a>		Medium	New	Author Author	08/22/2007 04:26 PM	<a href="#">Perform</a> ⌵
2. <input type="checkbox"/>	12221	<a href="#">Need more detail on recommending content</a>		None	New	Author Author	08/22/2007 04:23 PM	<a href="#">Perform</a> ⌵

[Select All](#) [Unselect All](#)

[Delete Selected Content Recommendations](#) ⌵  
[Add Content Recommendation](#) ⌵

The recommendation is displayed. Select the channel in which to create the new record and add any comments to the recommendation, then select **Create content record**:

## Manage Content Recommendations

### Submit Content Recommendation

Use this form to recommend new content.

#### Title

Need more detail on recommending content

#### Description

Need to describe how to complete a recommendation.

Select the Content Channel this document will use\*

Solutions ▼

Comments associated with action

Rejected - Duplicate ▼ [Create content record](#) >> [Reject with selected status](#) >> [Cancel](#) >>

This will bring up the Add Content page, as described in [Adding a New Content Record on page 30](#). Completed recommendations are removed from the list of recommendations, but can be retrieved by doing a **Find** with a **Completed by** that specifies the user who completed the recommendation, as described in [Finding Recommended Content on page 63](#).



---

## Chapter 3      Working with Tasks

---

You can define, generate, and manage tasks and task notification for users of your application based on various content management events using the Information Manager task management facility.

The Information Manager task management facility automatically generates tasks based on configured workflow processes and content lifecycle events such as content review dates. You can also define and configure batch jobs to generate tasks based on content rating levels. See [Action and Notification Tasks on page 68](#) for a complete list of tasks.

The Information Manager notifies users of tasks based on the user roles, privileges, and notification configuration defined for your application.

Administrators and users can access tasks based on their user profiles and privileges using the Management Console Inbox, as described in [Listing INBOX Tasks on page 70](#).

You implement Information Manager task management by:

- Configuring workflow processes as described in [Chapter 7, Workflow Processes](#) in the [Information Manager Administration Guide](#).
- Configuring task notification for users, as described in [Specifying Management Console User Properties](#) in the [Information Manager Administration Guide](#).

---

**NOTE:** You can also implement task generation and notification based on the JSP tag library, and external application processes via a Java based API.

---

You can report on task activity, such as average time to complete, number of open tasks, and task aging, using the Information Manager Analytics application, as described in [Using InQuira Analytics](#).

## Action and Notification Tasks

---

Information Manager defines the following types of tasks:

- Action tasks
- Notification tasks

Action tasks are available to be assigned to and performed by end-users. Information Manager notifies users about action tasks on the basis of the workflow process steps that are specified in their assigned security roles. For example:

- Information Manager generates a task when a content record in the Release Notes channel enters a workflow step called Release Note Approval
- Users having security roles that include the Release Note Approval privilege will see the task displayed in the Inbox

<i><b>Action Tasks</b></i>	<i><b>Description</b></i>
<b>Workflow</b>	These tasks are created when content records progress through a defined workflow process prior to publication. See <a href="#">Chapter 7, Workflow Processes</a> in the <a href="#">Information Manager Administration Guide</a> for more information.
<b>Translation</b>	These tasks are created when an authorized user or process determines that a content record should be translated. Information Manager requires a separate request for each locale, and generates a task for each request.
<b>Content Review</b>	These tasks are created when an authorized user or process determines that a content record should be reviewed. The review process is not tied to a workflow process.
<b>Recommendation</b>	These tasks are created when an authorized user or recommendation form requests a new document in the channel.

<b>Survey Answer</b>	These tasks are created when a survey response record is created within a channel. An email is sent to users who are authorized to see the results of a form and have expressed an interest in their user profile. See <a href="#">Chapter 8, Feedback and Collaboration Features</a> in the <i>Information Manager Administration Guide</i> for more information about surveys and responses.
----------------------	--

Notification tasks are the results of Information Manager processes that the user is authorized to receive information about. Information Manager typically notifies content owners for content-related notification tasks, such as content expiration; other notification tasks, such as data import completion, notify a specified email address.

<b>Notification</b>	<b>Description</b>
<b>Expiring Content</b>	Notifies content owners when content is due to expire based on a specified date or time period. Authorized users can specify content expiration as a default time period within the channel definition or on an individual record basis.
<b>Workflow Progress</b>	Notifies content owners of content progress within the workflow.
<b>Delinquent Workflow</b>	Notifies content owners when content is in a workflow step longer than the specified queue time.
<b>Rating Analysis</b>	Notifies content owners of content that exceeds or falls below a rating analysis batch job threshold. See <a href="#">Scheduling Batch Jobs</a> in the <i>Information Manager Administration Guide</i> for more information.
<b>Publish Notification</b>	Notifies content owners of content that has been published.
<b>Lost Password</b>	Emails user password when requested from the IM login page.
<b>Inactive Account</b>	Notifies the administrator when a user's account is set to inactive after too many failed login attempts.
<b>Content Subscription</b>	Notifies content subscribers of updates to content records.
<b>Forum Subscription</b>	Notifies forum subscribers of updates to forum topics.
<b>Forum Moderation</b>	Notifies Discussion Forums moderators when abuse is reported, or when other filters identify issues with forum content.

# Listing INBOX Tasks

You can manage the tasks that are available and assigned to you using the Management Console Inbox.

To view your available and assigned tasks:

- Select **INBOX** from the navigation area:



The Task page displays your current task list:

**Tasks** Filters: user test Skills On -- Assignments -- Demo Solutions English

**Assigned to test user (5)**

Age	Details	Type	Priority
<input type="checkbox"/> 18 hrs.	\$52 - Printer color different from display	Work Flow Tech Review	None
<input type="checkbox"/> 19 hrs.	\$59 - Translation and skills routing	Work Flow Tech Review	None
<input type="checkbox"/> 20 Days	\$23 - test new content march 7	Work Flow Tech Review	None
<input type="checkbox"/> 27 Days	\$56 - Here is an article	Work Flow Editor Review	None
<input type="checkbox"/> 22 Days	\$54 - how to sync songs to iphone	Work Flow Tech Review	None

Select All Unselect All

Re-Queue 59 Close Task 59

**Available to test user (3)**

Age	Details	Type	Priority
<input type="checkbox"/> 18 hrs.	Can't find the log files	Recommendation	None
<input type="checkbox"/> 18 hrs.	Need to document repository merge feature	Recommendation	None
<input type="checkbox"/> 18 hrs.	Need more detail on recommending content	Recommendation	None

Select All Unselect All

Assign to Selected User 20 Close Task 20

## Filtering the Task List

---

You can use the Filters at the top of the INBOX page to filter the task list.



The screenshot shows a horizontal filter bar at the top of the INBOX page. It contains several dropdown menus. The first dropdown is labeled 'Filters' and has 'user test' selected. To its right are dropdowns for 'Skills On', 'Assignments', 'Views', 'Channels', and 'Locales', each preceded by a double hyphen '--'.

The available filters are:

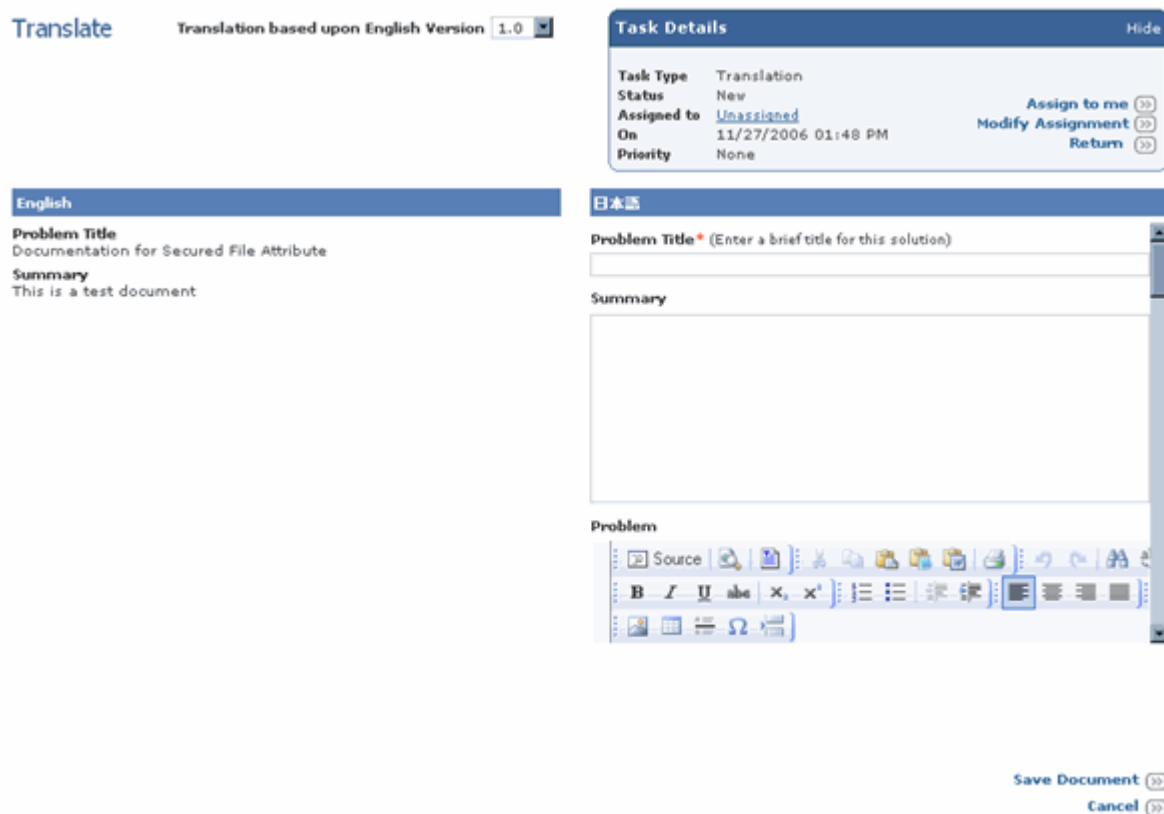
<b>User</b>	Select to view the tasks assigned to other users.
<b>Skills</b>	Select <b>Skills On</b> to list only the tasks associated with the records that have the same categories and the user categories. It is considered a match if a user or record is set with a subcategory and the other is set with a main category. See <a href="#">Chapter 4, Content Categories</a> in the <a href="#">Information Manager Administration Guide</a> for more information on Information Manager categories.
	Select <b>Skills Off</b> to ignore category matches when listing the tasks.
<b>Assignments</b>	Select <b>Assigned</b> to list only the tasks assigned to the specified user. Select <b>Unassigned</b> to list only the tasks available to the specified user.
<b>Views</b>	Select a view to list only the tasks associated with the records in that view.
<b>Channels</b>	Select a channel to list only the tasks associated with the records in that channel.
<b>Locales</b>	Select a locale to list only the tasks associated with the records for that locale.

## Viewing Task Details

You can view details about a task by selecting the task item in the Details column of the Inbox:



The Management Console displays task details in the appropriate page for the selected task type. A Translation page is shown in the example below:



The details page (the Translation page for this example) displays details based on the type of task that you select. Users can use the **Assign to me** option to assign available tasks to themselves. Users having the required privilege can also use the **Modify Assignment** option to assign the currently displayed task to another user. See [Assigning Tasks to Users on page 73](#) for more information.

## Assigning Tasks to Users

---

Authorized users can assign available tasks to other users from the Inbox's Tasks page. You can assign multiple tasks to a selected user from the Task page as described in [Assigning Multiple Tasks to a User on page 74](#).

To assign a task to yourself:

- Select the task in the Details column from the list of available tasks (tasks not assigned to you)

The Management Console displays the appropriate page for the selected task type.

- Select **Assign to me** in the Task Details portlet

To un-assign a task assigned to yourself:

- Select the tasks to close using the tasks' checkboxes in the list of tasks assigned to you
- Select **Re-Queue**

To assign a task to someone else:

- Select the task in the Details column

The Management Console displays the appropriate page for the selected task type.

- Select **Modify Assignment** in the Task Details portlet

The Management Console displays the Task Assignment page for the selected task type.

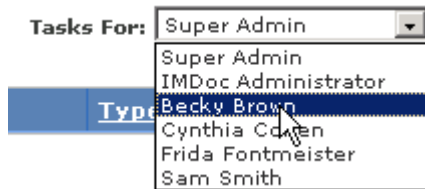
- Select the user to assign the task to from the **User** dropdown list
- Select the task priority from the **Priority** dropdown list
- Select **Assign Tasks**

## Assigning Multiple Tasks to a User

---

You can assign multiple tasks to a user from the Tasks page.

- Select the desired user in the Tasks for field:



- Select the tasks to assign in the Available Tasks list using the checkboxes
- Select **Assign to Selected User:**



The Management Console assigns the selected tasks to the selected user.

## Performing Tasks

---

You can perform tasks that are assigned to you, or for which you are eligible by selecting the task in the Inbox area.

---

**NOTE:** If you perform an action that satisfies a task from another area of the Management Console, for example by locating, selecting, and editing a content record from a search results list, Information Manager will update the task manager just as if you had performed the task by selecting it from the Inbox.

---

When you select a task, the Management Console displays information about the task and a link to perform the task. When you select a link to perform a task, the Management Console displays the appropriate functional page. The action of selecting a link will activate the appropriate Task Handler designed to manage the select task.

To perform a task:

- Select the task in the Age column from the list of assigned tasks (tasks assigned to you)



The Management Console displays the Task History page for the selected task.

- Select **Perform**
- Complete the task as appropriate for the task type

The Management Console automatically closes performed tasks. Closed tasks remain in the task list until removed by a scheduled process.

The Management Console closes the task. Closed tasks will remain in the task list, but can be removed by scheduling a Delete Closed Tasks batch process, as described in [Deleting Closed Tasks](#) in the *Information Manager Administration Guide*.

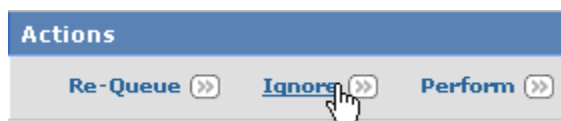
## Ignoring Tasks

---

Authorized users can close an assigned task without performing it using the Ignore option on the Tasks page.

To ignore a task:

- Select **Ignore** in the Actions column for the selected task:



The Management Console changes the status of the task as described in [Listing INBOX Tasks](#). Ignored tasks will remain in the task list, but can be removed by scheduling a Delete Closed and Ignored Tasks batch process as described in [Deleting Closed Tasks](#) in the *Information Manager Administration Guide*.

---

**NOTE:** You can use the **Restore** option in the Actions column to change the status of an ignored task back to Open:

---



