



FileNet Document Publisher

Getting Started

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CHAPTER 1

Introducing FileNet Document Publisher

FileNet Document Publisher comprises the workstation, FileNet Document Publisher Station, and the server, FileNet Document Publisher Server. If you have not yet installed and configured FileNet Document Publisher, please see the Installation Guide in the Documentation folder of your installed directory and also on the product disc.

If you have already completed the “Seven Easy Lessons,” you are probably familiar with the key interface elements discussed here. In that case, you may want to just skim the contents of this chapter and move on to Chapter 2, which explains how FileNet Document Publisher works.

In this chapter, you will

- Learn how to launch FileNet Document Publisher
- Become familiar with the Startup Screen
- Review the main window in FileNet Document Publisher, including the menu bar, standard toolbar, and large toolbar

Launching FileNet Document Publisher

Once you have installed FileNet Document Publisher, you can launch the web publishing tool in a number of ways:

- Choose **Programs** from the Start menu in Microsoft Windows, select the FileNet Document Publisher program group, and click **FileNet Document Publisher Station**.
- Choose the Run command from the **Start** menu and type the full path and name of the executable file, in quotes, in the text box (for example, "**C:\Program Files\FileNet Document Publisher\Transit.exe**").
- Double-click the executable file **Transit.exe** in Windows Explorer.
- Double-click the shortcut icon on the desktop (if you have set one up).

However you choose to launch it, FileNet Document Publisher opens initially with an About Box, which appears briefly on top of the FileNet Document Publisher main window before being replaced by the Startup Screen.

Startup Screen

The Startup Screen (see Figure 1-1) provides alternative ways to start a new project and open an existing one. It also offers three learning opportunities:

- **Wizard** — Opens the Add a Document wizard, which walks you through the basic steps required to turn a source document into a web page.
- **Seven Easy Lessons** — Opens a series of lessons (in PDF) that provide a quick introduction to the basics of using FileNet Document Publisher.

- **Tutorial** — Opens a second, more advanced series of lessons (also in PDF) that build on what you have learned in “Seven Easy Lessons.” (You do not have to complete “Seven Easy Lessons” before tackling the Tutorial, but we recommend that you do.)

Once you select an option in the Startup Screen, you will not return to this screen during your current session in FileNet Document Publisher. Rather, you will complete project setup in the main window, using the commands available there.

You can click Cancel to bypass the Startup Screen, if you prefer, and open a new or existing project directly from the File menu. You can also click **Don't show this screen again** if you do not want the screen to be available for future sessions. (To return to the screen at any time, choose Show Startup Screen from the Help menu.)

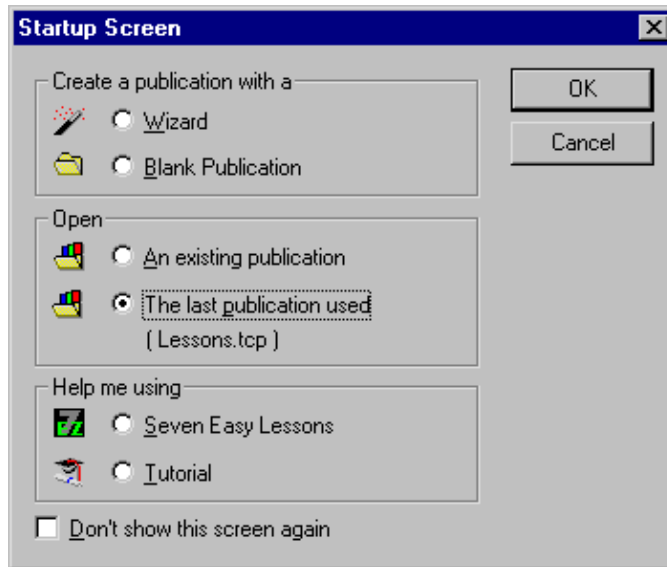


Figure 1-1 The Startup Screen, which can be opened from the Help menu at any time.

FileNet Document Publisher main window

The tools you use to set up publications for translation reside on the menu bar, the standard toolbar, and the large toolbar of the main window (see Figure 1-2). The menu bar contains all of the commands in FileNet Document Publisher, and the standard toolbar contains most of them. The large toolbar, which offers only key commands, may be especially useful when you start using the application, since you can quickly identify each button. Let us review all the commands.

Menu bar

To open a menu, click the menu name. You can then click any command from the drop-down list of commands. You can also use keyboard shortcuts to open menus and activate their commands.

- The **File menu** provides commands to open new and existing project files, to save project files, to open the Folder Import wizard, to import and export publications, and to exit FileNet Document Publisher. The last four projects you have worked on are listed at the bottom of the menu.

- You can use the Folder Import wizard (click Import to start the wizard) to add a portion of the directory structure of your file system to the publication hierarchy of your project. You can import the directory structure and the individual files in the folders or treat the folders as Directory Items when you import them. (See Chapter 4 for more information on Directory Items and the Folder Import wizard.)
- The **Edit menu** provides Windows edit commands: Cut, Copy, Paste, and Delete.

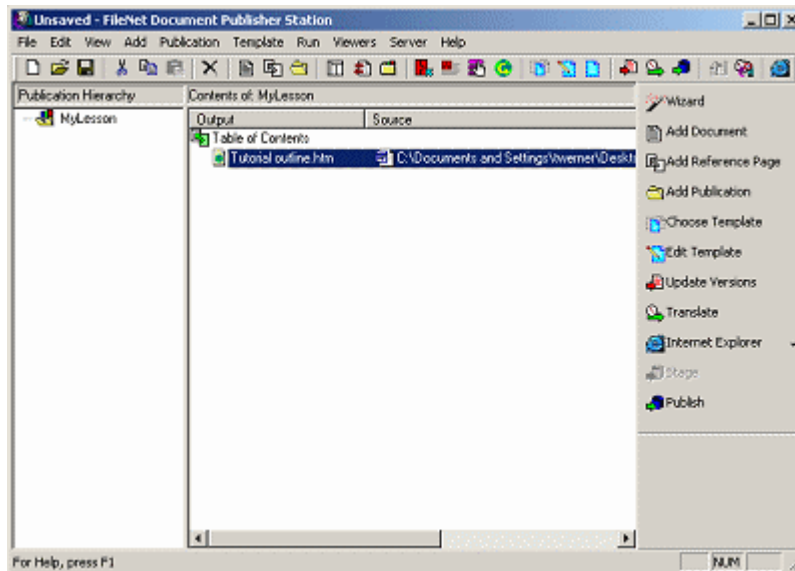


Figure 1-2 The FileNet Document Publisher main window, with the menu bar, standard toolbar, and large toolbar. The Publication Hierarchy pane displays the root publication and any subpublications, while the Contents pane shows details of the publication selected in the Publication Hierarchy pane.

- From the **View menu**, you can view the translation log file and open any source document selected in the Contents pane in its native format. (In the case of a source document from FileNet Content Manager or FileNet Content Services, a message will appear, asking whether you want to preview a read-only copy or check out the source document in its native format.) You can also open the Application Options and Project Options dialog boxes. The latter contain a variety of options for such settings as logging level and the output page naming convention you want to use. (They are discussed in detail in Chapter 6.) Finally, you can open the Toolbars submenu, which lets you show or hide the status bar and both toolbars, as well as customize the standard toolbar.
- From the **Add menu**, you can add a document, a reference page, a publication, or a Directory Item. When you add a Directory Item from the file system, individual source documents of a specified format automatically become a part of the translation process when they are added to the selected directory. When you add a Directory Item from FileNet Content Manager or FileNet Content Services, or from an FTP or HTTP site, you must use the Update Versions command before translating. However, if you are using FileNet Document Publisher Server, it does not matter where the Directory Item is from—the Server will automatically update the Directory Item before translating and publishing the project. (See Chapter 4 for more on Directory Items.)
- From the **Publication menu**, you can open the Layout dialog box, where you can create a frameset or table layout for your publication. You can also add

associated files (which become an integral part of your project and are processed by FileNet Document Publisher during translation) and open the Publication Properties dialog box. All three commands are also available from the popup menu that appears when you right-click a publication in the Publication Hierarchy pane.

- The **Template menu** provides access to the four template editing options: **Element Setup**, **Formatting**, **Navigation**, and **Globals**. You can also open the Choose Template, Edit Template, and Manage Templates dialog boxes.
- From the **Run menu**, you can translate source documents. The Translate command runs an incremental translation. Typically, this is what you will want to do most of the time as you create and fine-tune your web publications. (The command is also on the standard and large toolbars). The Translate All command runs a complete translation (which you can also accomplish by deleting all your output files or changing your output directories). With the Translate Selected command, you can translate a selected portion of your publication. (First select one or more files in the Contents pane before choosing the command, which is also available by right-clicking the selected files to open a popup menu. Choosing the command opens the Selective Incremental Translation dialog box.)

The Run menu also contains five commands that come into play when you use Document Publisher Station with Document Publisher Server: Update Versions, Stage, Staging Options, Publish, and Publishing Options. Update Versions is an important command for updating your source documents before translation (it can also be used to update source documents from an FTP or HTTP site). The Stage command is used to “stage” your final output to a repository, so that you can review and approve your web publication before publishing live to your web site, using the Publish command. (See Chapter 5, “The Publishing Process,” for more information on staging and publishing.)

- The **Viewers menu** enables you to launch the default web browser associated with Document Publisher Station and to associate additional viewers with the program. The viewers can include utilities such as Notepad as well as browsers.
- The **Server menu** lets you move project files to a network location (by using the Project Export wizard) and schedule the automated translation of projects (by using Document Publisher Scheduler to connect to Document Publisher Server).
- The **Help menu** provides access to the comprehensive online Help system, to the “Seven Easy Lessons” and the Tutorial, and to product and copyright information.

Once you have opened an existing project or created a new one, and completed setup, you will spend most of your time using the four template editing commands available from the Template menu and standard toolbar. These commands are also available from the Edit Template dialog box. Project setup issues specific to using FileNet Content Manager or FileNet Content Services with FileNet Document Publisher Server are discussed in “Project setup in a FileNet repository” on page 35.

Standard toolbar

Buttons on the standard toolbar mirror most of the commands available from the menu bar. The standard toolbar can be seen as a set of smaller toolbars, set off from each other by separators. As you pass your cursor over the toolbar, a tooltip will explain each command.



Figure 1-3 The standard toolbar.

You can use drag-and-drop to position the toolbar anywhere on the desktop. You can also resize the toolbar with your mouse (see Figure 1-4). To remove any command from the toolbar, select the icon, hold down the Alt key, and drag the icon off the toolbar. To customize the toolbar, click Toolbars on the View menu and choose Custom from the submenu.



Figure 1-4 The standard toolbar, shown here as a toolbox. The vertical separators ensure that related icons stay together when the toolbar is resized.

Large toolbar

The large toolbar down the right side of the main window (see Figure 1-5) is similar to the standard toolbar below the menu bar, but it contains only the main commands you are likely to use in FileNet Document Publisher Station. Since the buttons are labeled, new users may find this toolbar useful at first. (To hide the toolbar, choose Large Toolbar from the Toolbars submenu of the View menu.)

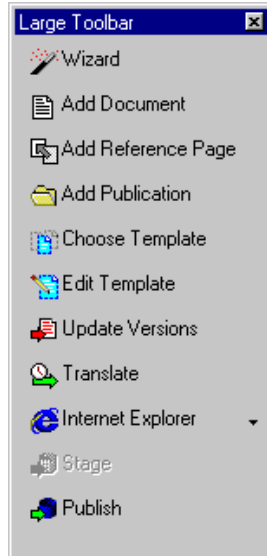


Figure 1-5 The large toolbar, which you can hide or show at any time by choosing Large Toolbar from the Toolbars submenu of the View menu. You can also drag and drop the toolbar on the desktop.

Popup menus

Throughout FileNet Document Publisher there are many opportunities to right-click in order to open a popup menu with a selection of commands appropriate to where you are in the interface. For example, when you right-click a source document in the Contents pane of the main window, the following popup menu appears:

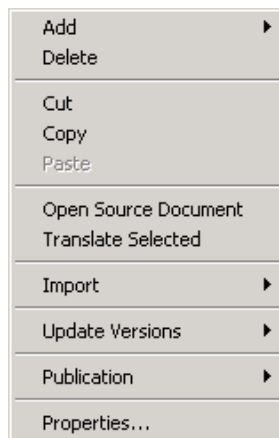



Figure 1-6 Popup menus can be opened from different parts of the interface. The commands available will vary, depending on where you are in the interface and what you right-click.

There are many “right-click opportunities” in Document Publisher Station to help you speed up the execution of commands.

Help

Also available throughout Document Publisher Station are numerous Help buttons, which can be found on most of the property sheets and dialog boxes: 

Clicking a Help button will open a topic in the Help system that is specific to the property sheet or dialog box you happen to be working in. Remember, too, that you can always choose Help Topics from the Help menu to gain access to all of the topics in the Help system.

About the Help system

FileNet Document Publisher provides a Help system that consists of individual Help topics in HTML (HyperText Markup Language) format. You can view the Help system in a web browser such as Internet Explorer or Netscape Navigator (see figure), and you can use conventional web browser controls to navigate and view the Help topics (Back, Forward, Refresh, and so on).

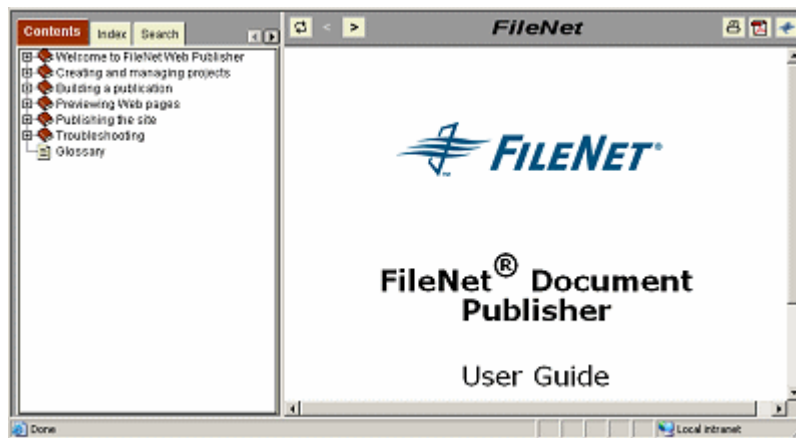



Figure 1-7 Online Help in FileNet Document Publisher

You can open Help by clicking **Help > Help Topics** in Document Publisher Station. Each dialog box in Document Publisher Station (as well as Document Publisher Scheduler and Document Publisher Server) has a Help button as well that takes you directly to a topic that describes the functionality of the dialog box. You can gain









access to the rest of the Help system by clicking the **Show Navigation**  button in the navigation bar above the Help pane. (This button only appears when you open Help topics from a Help button.)

The online Help contains the following navigation options:

- **Contents:** The Contents tab contains an expandable list of Help topics. Click a book icon to expand or collapse that section of the Help system and then select the desired Help topic to view a topic.
- **Index:** The Index tab provides immediate access to individual Help topics by keyword.
- **Search:** The Search tab provides a full-text search of the Help system. Type the word or phrase you are looking for and then click **Go** (or press Enter on your keyboard).
- **Favorites:** The Favorites tab provides a means to save topics that you have found useful and anticipate viewing again. (When viewing such a topic, click **Favorites** and then click **Add** to add the topic to your Favorites list.)

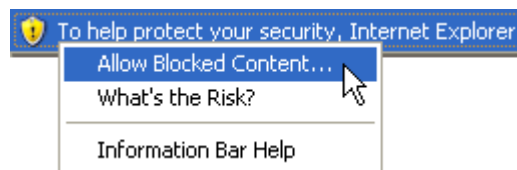
Note: The Favorites tab does not display if your browser does not support the Java applet used by the Help system.

The online Help also includes a toolbar with the following options:

Toolbar	Definition
	Highlights the title of the topic currently being viewed in the Contents tab. If you open a Help topic by clicking the Help button in a dialog box, the Show Navigation button  will appear, instead.
	Displays the topic that precedes the currently displayed topic. (The order of topics can be seen on the Contents tab.)
	Displays the topic that follows the currently displayed topic. (The order of topics can be seen on the Contents tab.)
	Opens a new, blank email message with the name of the Help topic in the Subject line, addressed to FileNet Technical Support. Please use this feature to provide feedback to FileNet on the topic itself or how the topic is documented.
	Prints the currently displayed topic by using your web browser print feature.
	Opens a PDF version of the Getting Started (this manual).
	Connects to the FileNet web site (www.filenet.com), where you can learn more about FileNet products, upcoming events, and technical support.

Notes

- The FileNet Document Publisher Help system uses a secure Java applet to display the Contents, Index, Search, and Favorites tabs. If the Java applet is not installed or enabled in the web browser used to view Help, a JavaScript rendition of Help will display, instead. If both Java and JavaScript are disabled in the web browser, the browser will not be able to display Help.
- The Java applet is not supported by Internet Explorer on UNIX, Netscape 4.x on Macintosh, Netscape 6.x on any platform, or by any machine running a newer version of the Java Runtime Environment (JRE) 1.3.1_02. For these browsers and operating systems, the JavaScript rendition of Help displays (assuming it is not disabled in the browser).
- If you are running Windows XP Service Pack 2 and open Help from FileNet Document Publisher, you may not see its contents because the Information Bar in Internet Explorer prevents you from viewing active content. This is because the Help system uses client-side JavaScript to display the Contents pane. To view the Help system, click on the Information Bar and choose **Allow Blocked Content** (see figure).



For more information, see Internet Explorer Help.

CHAPTER 2

How FileNet Document Publisher works

If you have completed the “Seven Easy Lessons,” you already know how easy it is to create a simple web publication in FileNet Document Publisher, one consisting of a single source document that becomes a single web page. Before you tackle more sophisticated publications—consisting of a fully linked set of web pages created from multiple source documents—you should become familiar with the key concepts outlined in this chapter.

A simple web publication

Figure 2-1 shows web publishing with FileNet Document Publisher in its simplest terms. You can see how a source document created in a word processor, which traditionally might be printed from a laser printer or by other conventional means, can easily be imported into FileNet Document Publisher and re-purposed for viewing on a web server.

To accomplish this in FileNet Document Publisher, you would:

- Start a new project
- Create a new publication
- Select a source document from your file system (or from a FileNet repository)
- Associate a template with that document
- Import styles or patterns from the document, or ask FileNet Document Publisher to apply ranks
- Format the elements associated with those styles, patterns, or ranks
- Translate the document to turn it into a web page

All of this can be done with surprising ease in Document Publisher Station.

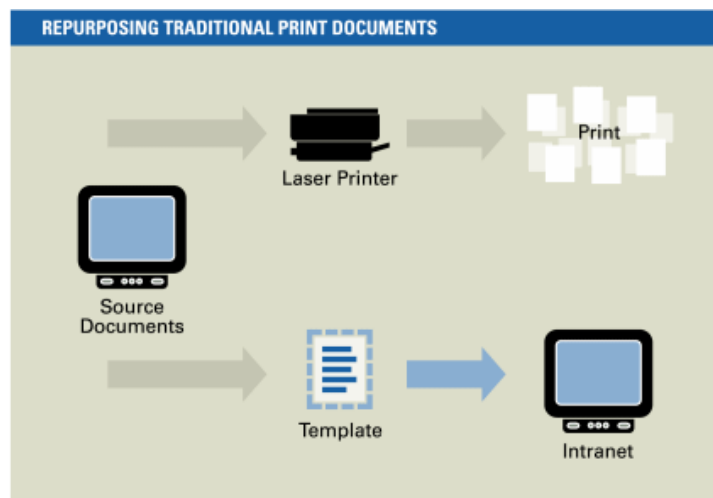


Figure 2-1 Print documents can easily be repurposed for publishing on an intranet.

More options

Thanks to the power of FileNet Document Publisher, you can just as easily handle more complex projects. For example, to create a more sophisticated web publication, you could

- Include numerous source documents in a variety of file formats in your project
- Obtain these source documents just as easily from a repository such as FileNet Content Manager or FileNet Content Services, or an FTP or HTTP site
- Build a reference page, such as a table of contents, or key word index, to aid navigation and information retrieval
- Associate different templates with different types of source documents and reference pages to create a special look for each topic area
- Build a publication hierarchy by adding publications to the root publication and then adding source documents and reference pages to each publication
- Add a Directory Item to a publication, to let content authors drop documents in a specified format into that directory and to have those documents automatically translated to become a part of your web publication
- Create a frameset or use tables or custom tables to help structure your web publication and treat special content in consistent ways
- Turn a regular project into a master project by including a linked publication as a subpublication in the master project's publication hierarchy

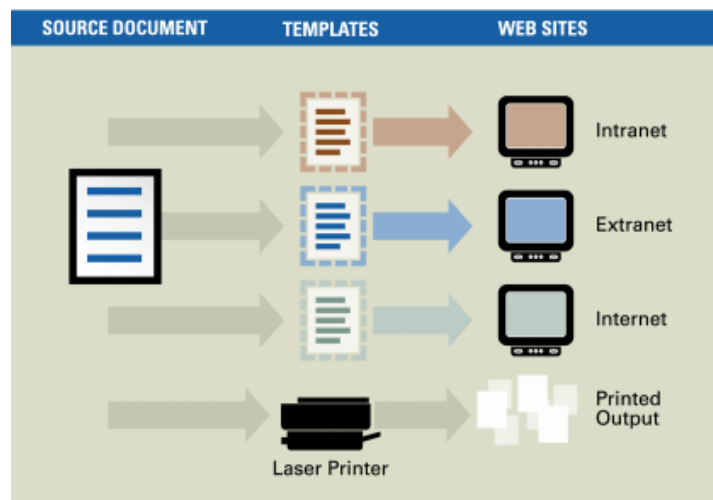


Figure 2-2 With different templates you can fine-tune the look and behavior of source documents in your project and publish to a web server, whether for an intranet, extranet, or Internet site.

Working with a FileNet repository

When FileNet Document Publisher is used with FileNet Content Manager or FileNet Content Services, even more options are available to you. You can

- Take advantage of FileNet Document Publisher's dual-publishing capability to first stage your output for review and approval before you publish it to your web site

- Place document information from FileNet Content Manager or FileNet Content Services in the output web pages you create

Project setup

However simple or complex your web publication, there are certain key stages in the process of creating that publication. Much of what you do in Document Publisher Station during the preliminary stage of project setup is related to creating one or more templates to capture a variety of formatting and other instructions that determine the look and behavior of your web publication onscreen. All that information is saved (with other information) in a project file that can be opened at any time so that you can quickly re-create your publication or edit the templates.

Project setup is discussed more fully in Chapter 4, “Project setup in a FileNet repository,” especially in the context of taking source documents from a FileNet repository. For now, let us review what happens each time you add a source document to a project in FileNet Document Publisher (whether from the file system or FileNet Content Manager or FileNet Content Services). The content of those documents is, after all, what concerns you the most.

Ranks, styles, and patterns

When you select a source document—that is, add it to your project—the first thing you must do is associate a template with that document. (As soon as you add the document, Document Publisher Station automatically opens the Choose Template dialog box. It is not critical which template you initially associate with the source document, because you can return to this dialog box at any time and choose another template instead.)

When you select a template, you must also decide which setting you want to use under Import Styles or Patterns. With the default setting None, Document Publisher Station creates a default set of ranks that are applied to content at translation time to ensure that top-level hierarchy is always treated consistently, even when the source documents are inconsistently formatted. Document Publisher Station creates an element for each rank and places those elements in the template. If you select Styles or Patterns instead, Document Publisher Station proceeds to import styles or patterns from the source document and automatically generates an element for each style or pattern and places those elements in the template, instead.

Thereafter, all editing begins by first selecting the template in the Contents pane of the main window and choosing one of the template editing options. In most cases, you then select one or more elements to apply precise settings to specific portions of the document’s content.

During translation, Document Publisher Station takes the content of each source document, reformats it per your instructions in the template and elements, and produces an HTML file, which it places in an output directory. This file is the web page you view in a web browser. Your source documents remain unchanged. And you can update each web page of your web publication repeatedly with push-button simplicity whenever you revise the appropriate source document.

So one of the keys to FileNet Document Publisher is understanding the power and flexibility of templates and elements. Once you have gone through the initial phase of setting up a project, you are ready to tap this power and flexibility to create the exact look and feel that you want for your web pages.

Templates and elements

A template in FileNet Document Publisher is similar to a template in a word processor. It contains formatting instructions that determine how your source document will look when turned into a web page and viewed in a web browser.

In Document Publisher Station, you can always “pass through” a source document and its formatting, based on its existing styles. In other words, you can translate the document without changing the elements. You may, in fact, want to do this each time you create a new publication and translate its source documents for the first time. (To do so, simply associate the source documents with the Blank template in the Choose Template dialog box.) However, the power of FileNet Document Publisher resides in your ability to not only reformat the original attributes of any style (font, size, etc.), but to use templates and elements to shape the hierarchy of a document and to make its content accessible to users in different ways.

You can use elements to place content in different reference pages or suppress it entirely from a web page; create button and text bars for navigation; create links between different portions of a source document; embed HTML or scripting code in portions of the content; and much more. In short, elements allow you to treat individual portions of the content in special ways.

As a result, you could have two templates that contain a duplicate set of elements that mirror the styles of a particular document. If you format the two templates differently, you can switch templates at any time to produce a dramatically different result in the web page you create when you translate the document. All this information is captured in a template, which, in turn, is captured in the project file unique to each publication.

The project file

When you create a project, you will likely want to preserve all the important details of the project so that you can update it at any time. FileNet Document Publisher simplifies the management of web publications by allowing you to capture important information about each project in its own project file.

Each time you begin a new project, you open a copy of the default project file, Default.tcp. “Unsaved” appears in the title bar. (You can choose Save As from the File menu to name the file and save it to whatever directory you want.)

With the project file, you capture information about

- the publication hierarchy, consisting of the root publication and all subpublications at levels below the root publication
- each publication in the hierarchy in terms of its source documents, output pages, optional reference pages, the template associated with each document, and also the frameset (if any) that is associated with the publication
- special subpublications that consist of Directory Items or linked publications
- output directories
- any global instructions that apply to the web publication as a whole

If you use the same setup for source documents and output directories each time, updating an archived web publication is easy. You simply revise the content of a source document, open the project file for the publication that contains that document, and retranslate. (If you choose FileNet Document Publisher’s incremental translation option, FileNet Document Publisher detects which source documents

have changed since the last translation and translates only those. You will want to choose the Update Versions command first.)

Note: The default name for a new project, “Unnamed,” appears at the top of the Publication Hierarchy pane and also above the Contents pane. You can use the same name for both the root publication and the project file, if you want. To name the root publication, right-click the publication and choose Properties from the popup menu, and enter a new name in the Publication Name text box.

Key terms

Below is a list of key terms used in FileNet Document Publisher. These terms are essential to your understanding of FileNet Document Publisher if you are to use the web publishing tool to full advantage.

project — The overall term for the web publication you create that encompasses the project file, its templates, and all source documents, related graphics, and associated files.

project file — What you need to begin a new project. Document Publisher Station starts with a copy of the default project file already open (“Unsaved” appears in the title bar). You use a project file to save important details about a project, including the publication hierarchy, the location of source documents, the template associated with each document, and the location of output directories for the HTML files produced during translation. (Document Publisher Station automatically zips your project file each time you save it in order to compress it. The .tcp extension remains unchanged.)

Default.tcp — The default project file that is installed in the ..\Resource\en folder of the FileNet Document Publisher directory. Document Publisher Station opens a copy of Default.tcp each time you start a new project. You can edit Default.tcp, if you want, to customize the templates or settings you want available each time you start a new project.

DefaultWML.tcp — The default project file used to create WML projects, also available in the ..\Resource\en folder in the FileNet Document Publisher directory. (Copies of both default project files are on the product disc.)

master project — The same as a regular project except that it contains one or more linked publications; that is, one or more subpublications in the project’s publication hierarchy contain a link to another project file.

linked publication — A publication with its own project file that is linked to an existing project, which becomes the master project, as a result. You must open the linked publication by itself in Document Publisher Station in order to edit it. Once the linked publication is edited, you can update it within the master project by using the Update Versions command.

project author — The individual responsible for a project, that is, for creating the project and templates, setting staging and publish options, and so forth.

content author — The individual responsible for creating the source documents that reside in a repository (typically, FileNet Content Manager or FileNet Content Services) and are the proposed content of your web site.

webmaster — The individual responsible for reviewing a project on the staging area and for authorizing its final approval and release to the web site (publishing area).

source document — The content you want to translate into HTML format and display in a web browser. FileNet Document Publisher can convert source

documents in over 225 formats. (The major ones are listed in Appendix A, “File formats and translation” on page 84.) Once you translate each source document, it becomes a web page for viewing in a web browser.

publication — a container for the source documents that you want to translate and any reference pages you want FileNet Document Publisher to build.

Each new project has a root publication. (Its default name, “Unnamed,” appears at the top of the Publication Hierarchy pane. To name the root publication, right-click it and choose Properties from the popup menu.) You can create a publication hierarchy by adding publications to the root publication, publications to those publications, and so on. (Each publication, when added to another, becomes a subpublication.)

Whatever the publication—the root publication itself or one of its subpublications—it should be a logical entity that reflects a natural grouping of content, to which you can add frames, tables, reference pages, etc., to reinforce that content.

publication hierarchy — What is visible in the Publication Hierarchy pane, that is, the root publication and all subpublications at all levels. Each project in FileNet Document Publisher consists of at least a root publication. But you can add publications to the root publication, and publications to those publications. When you select a publication in the Publication Hierarchy pane, its contents display in the Contents pane. You can view the contents of only a single publication at a time in the Contents pane.

web publication — What you create in Document Publisher Station for viewing in a web browser. At its simplest level, a web publication consists of a single web page (from the translation of a single source document). But a web publication typically will comprise many web pages, including reference pages such as a table of contents (TOC). Moreover, the publication hierarchy can be quite sophisticated, consisting of many publications at different levels, each one containing its own source documents and reference pages, with some of its subpublications representing a Directory Item or a linked publication.

web page — The smallest unit of a web publication, which may reside in a single frame of a frameset. FileNet Document Publisher creates two kinds: body page and reference page.

body page — What you create each time you translate a source document. Body pages correspond to the content of source documents and are the main output of translation. Each one is an HTML file. (If your source document contains embedded or linked graphics, FileNet Document Publisher converts them into individual graphics files, in the GIF, JPEG, PNG, or BMP format. So a body page may have related graphics files.)

reference page — An optional page built during translation. Reference pages derive their content from body pages and are automatically linked to them. There are four types: publication Table of Contents (TOC), List of Tables (LOT), List of Figures (LOF), and Index. Each one is an HTML file. (Note: The TOC you place at the beginning of body page is a “page TOC” and is a part of the same HTML file as the body page. Its contents typically differ from the contents of the publication TOC.)

Directory Item — A directory or folder that you have added to a project in FileNet Document Publisher so that source documents placed in the directory at any time become part of the project.

In the file system, on an FTP site, or in FileNet Content Manager or FileNet Content Services, you can also create a *dynamic* Directory Item, whereby FileNet Document Publisher incorporates into a project not only the identified folder (directory), but all the folders below that folder in the system hierarchy. In addition, with a FileNet repository you have the option of using a stored search for a Directory Item.

Whether the Directory Item is based on the file system hierarchy, an FTP or HTTP site, or a folder or stored search in FileNet Content Manager or FileNet Content Services, you must use the Update Versions command before you translate. However, updating is automatic when you schedule projects for translation by Document Publisher Server, because the server automatically updates Directory Items before it translates projects.

repository — A place where electronic files are stored. Usually implies that access to the files in the repository, and the use of those files, is controlled. In FileNet Document Publisher, the file system, an FTP site, an HTTP site, and FileNet Content Manager and FileNet Content Services are all referred to as “repositories.”

stage / staging — Part of the dual-publishing option in FileNet Document Publisher. When Document Publisher Station or Document Publisher Server stages a project, this means that the translated output is copied from the file system to a staging area so that the contents of your web publication can be formally reviewed and approved before being published.

publish / publishing — Part of the dual-publishing option in FileNet Document Publisher. When Document Publisher Station or Document Publisher Server publishes a project, this means that translated output is copied from the file system to a publishing area—in effect, your web site. Typically, you will want to stage your project before you publish it (go live on your web site). But you can publish without staging (and stage without publishing).

web site — Where you publish your web publication. Referred to also as the publishing area or location.

frameset layout — One of three layout options in FileNet Document Publisher. With frameset layout, you create a set of frames that help you organize content for viewing in a web browser. In FileNet Document Publisher, all body pages must display in a single frame of any frameset you use. But other frames can contain graphics, TOCs, and other types of reference pages. They can also be used to target URLs, HTML code, or JavaScript. You can use the same frameset for all the publications in the publication hierarchy of a given project or a different frameset for each one.

table layout — One of three layout options in FileNet Document Publisher. With table layout, you can create a structure of cells instead of frames to organize your content for viewing in a web browser. All body pages must display in a single cell of any HTML table that you create. But other cells can contain graphics, TOCs, and other types of reference pages. They can also be used to target URLs, HTML code, or JavaScript. You can use the same table layout for all the publications in the publication hierarchy of a given project or a different table layout for each one.

custom table layout — One of three layout options in Document Publisher Station. This option is especially useful if you are creating your web site look and feel in a third-party HTML editor such as Macromedia Dreamweaver or Microsoft FrontPage.

template — A key feature in FileNet Document Publisher, similar to a word processing template, that allows you to capture all the formatting instructions associated with a document. Most of these instructions are associated with the individual elements that the template contains (some are associated with the template itself).

You can associate only one template with a given document, but the same template can be associated with many different documents. Templates are saved as part of the project file and typically do not exist as separate files. But you can create a template file, if necessary, to export a template for use in another publication. You can also place a template file on a network and establish a link to that template from any FileNet Document Publisher workstation connected to the network.

Multiple users can link to the template at the same time. (You must import a linked template into FileNet Document Publisher in order to edit it.)

A template associated with a source document is sometimes referred to as a *body page template*, to differentiate it from the special *reference page template* you associate with a reference page.

Element — Another key feature of FileNet Document Publisher. When you import styles or patterns from a source document, Document Publisher Station generates an element for each style or pattern. (If your document contains a style named Heading 1, Document Publisher Station creates an element named Heading 1.) Likewise, if you choose ranks, Document Publisher Station will create an element for each rank (which will be applied at translation time). Once Document Publisher Station creates an element for each style, pattern, or rank, you can use these elements to format your source documents.

Elements reside in a template. Their names are displayed in an Elements list found in many of the tab dialogs. Each element represents corresponding content in the source documents. As you format the element, you are setting formatting instructions for all content that corresponds to that element. You can select multiple elements and format them as a group.

style — There are two kinds of styles in FileNet Document Publisher: paragraph and character. A *paragraph style* is a set of formatting characteristics that are saved and given a name so that the style can be applied to any paragraph in a source document. Typical styles in a word processing file are Normal, Heading 1, and Footer. FileNet Document Publisher imports named styles from a source document and generates an element for each style. You format content by formatting the elements to turn the document into a web page. You use mostly paragraph styles to create web pages.

A *character style* is where selected subject matter within a paragraph has been assigned formatting attributes different from the paragraph style. The formatting of a character style overrides the subject matter formatting of the paragraph style. Word processor programs often contain built-in character styles such as Annotation Reference and Footnote Reference.

pattern — In many instances organizations have manually formatted documents. FileNet Document Publisher can handle such documents by recognizing patterns in how the font attributes have been set. Say your source document is set totally in the Normal style, with two major headings set in 16-pt bold and 12-pt italic, respectively. And let us assume that no other text uses these font attributes. In that event, FileNet Document Publisher will recognize the font attributes of these headings as patterns and assign pattern names to them (and probably create the elements Heading 1 and Heading 2 for the headings and assign the Default Paragraph element to all other content). Once FileNet Document Publisher assigns elements to those patterns, you can edit the elements to format your document. (FileNet Document Publisher can also handle text documents, which are completely unstyled, but your formatting options here are obviously limited.)

Like styles, you can have paragraph patterns and character patterns. Character patterns can be useful for isolating specific text or data within a paragraph that you want to treat in a special way. Many templates in the default project file contain three standard character patterns that can be particularly useful: HTTP, WWW, and Email.

rank — Serves as a way to recognize the *content hierarchy* of a document. Can be especially useful when you are importing a variety of source documents where some contain named styles and others have manually formatted content, or where styles have been inconsistently applied. Rather than import styles or patterns, FileNet Document Publisher creates a default set of ranks, which it applies to content at

translation time to ensure that the top-level hierarchy of the documents is treated consistently. Ranks can be especially useful where you are translating legacy documents or have added a Directory Item to your project.

Note: In the Choose Template dialog box, the default setting under Import Styles or Patterns is None. This means that Document Publisher Station will use a default set of ranks rather than import styles or patterns. You must formally select Styles or Patterns in order to import styles or patterns.

metadata — Information associated with a source document, such as the author's name, the document's title, and the document's date of creation. FileNet Document Publisher recognizes three kinds: repository (which you assign to a document when you check it into FileNet Content Manager or FileNet Content Services), and standard and custom (which are created in the application used to create the source document). Unlike styles, patterns, and ranks, metadata are not automatically associated with elements. But you can make any metadata element-based and then place that element in your web pages and publish the element to your FileNet repository.

What's next

Now that you understand some of the key concepts and terms used in FileNet Document Publisher, you are ready for Chapter 3, which explains how to use FileNet Document Publisher Server to automate the publishing process, and Chapter 4, where you will explore project setup when using FileNet Document Publisher with FileNet Content Manager or FileNet Content Services.

Chapter 5 explains the publishing process, including the dual-publishing model (staging and publishing). Chapter 6 examines project and application options.

CHAPTER 3

Scheduling projects on FileNet Document Publisher Server

When you create projects in FileNet Document Publisher, you have the option of translating those projects manually in FileNet Document Publisher Station or using FileNet Document Publisher Server to automate the translation process and gain greater control over your Web publishing efforts. With the utility FileNet Document Publisher Scheduler, you can schedule projects to run on the Server at any time, as long as the Server has access to the FileNet repository where the project file and all source and associated files reside.

Document Publisher Scheduler is installed with Document Publisher and can be opened from the workstation at any time. If you install Document Publisher Server on a dedicated server machine, Document Publisher Scheduler is also installed. In that event, you can open Scheduler from the Windows program group or by double-clicking TCScheduler.exe in the installed directory.

Figure 3-1 shows how Document Publisher Scheduler allows Document Publisher Station to communicate with Document Publisher Server. As you schedule each project, that project becomes part of a task list in Document Publisher Scheduler. The log file shown is the one generated for server activity, not from translating projects on the task list. (See Chapter 6, “Setting project and application options.”)

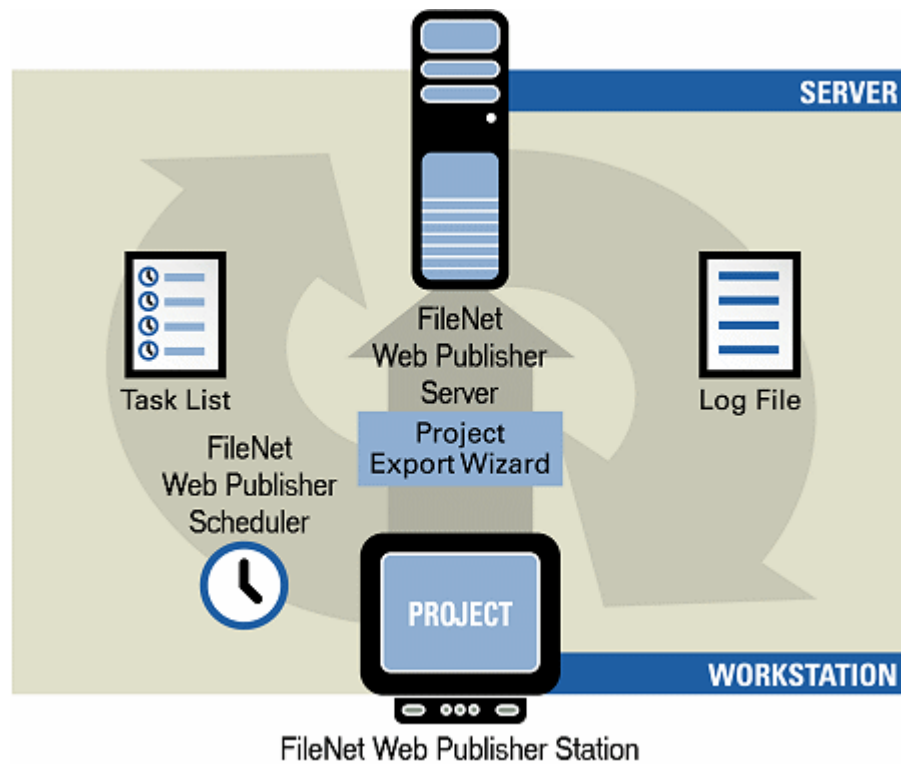


Figure 3-1 The various components of FileNet Document Publisher. Source documents and associated files may be stored in FileNet Content Manager or FileNet Content Services, which may also be used for staged and published output.

The project files you schedule—as well as all of your source documents and associated files—can just as easily be stored in a FileNet repository as in the file system. In that event, Document Publisher Server will need access to the FileNet repository.

Publishing in FileNet Document Publisher Server

There is one significant difference between publishing in Document Publisher Station (when used as a standalone workstation) and using Document Publisher Server to automate the publishing process. In Document Publisher Station, four important commands are executed *manually* and *separately*, whereas in Document Publisher Server these same commands can be executed *automatically, as one*: Update Versions, Translate, Stage, and Publish.

That is, when you schedule a project for translation by Document Publisher Server, the Server can automatically:

- Update all source documents at run-time (unless you have specified that certain versions be used),
- Translate the documents,
- Copy the translated documents to the staging location (as specified in Staging Options), and also
- Copy the translated output to the publishing location (as specified in Publishing Options)

Choosing your options

You do not, in fact, select Update Versions in Document Publisher Scheduler. When you choose the Translate command, the project is automatically updated when it runs at the scheduled time in Document Publisher Server. (Since updating makes no sense unless you also translate, updating does not occur if you simply stage or publish your project.)

You are unlikely to use the Stage and Publish commands together, since the point of staging is to review your web output before publishing (placing it directly on your web site). Typically, you would schedule your project just to Translate or to Translate and Stage. You would then schedule the same project as a separate task just to Publish.

For example, you might set up a task for the project to be translated and staged on the 4th, 11th, 18th, and 25th of each month, and also set up a separate task for the same project to be published on only the 1st of each month. Thus, after the first day of each month, you would know that you had a month to review and approve successive, staged versions of your project on your staging location. (Of course, you can only stage and publish if you have set staging and publishing options, respectively.)

On the other hand, if you have full confidence in your web output, you may choose to bypass staging altogether, in which case you would use the Translate–Publish sequence. (For more information on staging and publishing, see Chapter 5, “The publishing process” on page 57.)

Finally, you can also choose to simply update and translate. This might make sense if, say, the webmaster wants to wait until all content authors have submitted their projects for the web site and all tasks have been processed cleanly by the server. It

might also make sense if, say, you are still in the process of creating your project and it just does not make sense to stage (or publish) just yet.



Versioning the project file

In Document Publisher Station, you create a project file when you save a new file to FileNet Content Manager or FileNet Content Services for the first time. Thereafter, each time you use the Save command, you create a new version of the project file in the FileNet repository.

In Document Publisher Server, the project file is automatically updated just before translation. (If, for example, the project contains one or more Directory Items, it is very likely that new source documents have been added to the project since it was scheduled for translation.) Document Publisher Server then translates the source documents and saves the project file in the FileNet repository. (It may also stage or publish the translated output, if one of those options was selected when the project was added to the task list.)

When Document Publisher Server saves the project file to the FileNet repository, it assigns a new version number. The version numbers of a project file are only visible when you view the project file in FileNet Content Manager or FileNet Content Services.

Connecting to FileNet Document Publisher Server

1. With FileNet Document Publisher running, click **Scheduler**  on the toolbar or choose **FileNet Document Publisher Scheduler** from the Server menu.
2. In the FileNet Document Publisher Scheduler window, click **Connect**  on the toolbar or choose **Connect** from the Server menu, to open the Connect to Server dialog box.

Note: If you have previously connected to a particular server, you will automatically connect to that server when you start Document Publisher Scheduler. (The title bar will display the name of the server you are connected to.) If you now want to connect to a different server, use the Connect command.

3. In the text box, type in the name of the server you want to connect to, that is, the machine on which Document Publisher Server is running.

If you are running Document Publisher Server on your local machine and are not sure of the Server's name, right-click Network Neighborhood in Windows Explorer and choose Properties from the popup menu. On the Identification tab dialog you will see the name of your machine displayed in the Computer Name text box.

If you are running Document Publisher Server remotely, click Browse in the Connect to Server dialog box to open the Browse for Computer dialog box, which displays the Network Neighborhood. You should see the name of the machine there. Select the machine from the list. (If it is not available, contact your network administrator.)

Note: If you are running Document Publisher Server remotely, it must be running in order to successfully connect to it.


4. Click **OK**. The title bar of Document Publisher Scheduler displays the name of the machine you are now connected to.

Once you are connected to the machine on which Document Publisher Server is running, you are ready to schedule projects for translation.

Scheduling projects for translation

Scheduling a project in Document Publisher Scheduler is a two-part exercise: first you specify the task, and then you set the actual schedule. If you are both staging and publishing the project, you will likely want to schedule the project twice (using the first task to stage the project and the second task to publish it).

To specify the task

1. In Document Publisher Scheduler, click **New Task**  on the toolbar or choose **New** from the Task menu to open the New Task dialog box (see Figure 3-2).

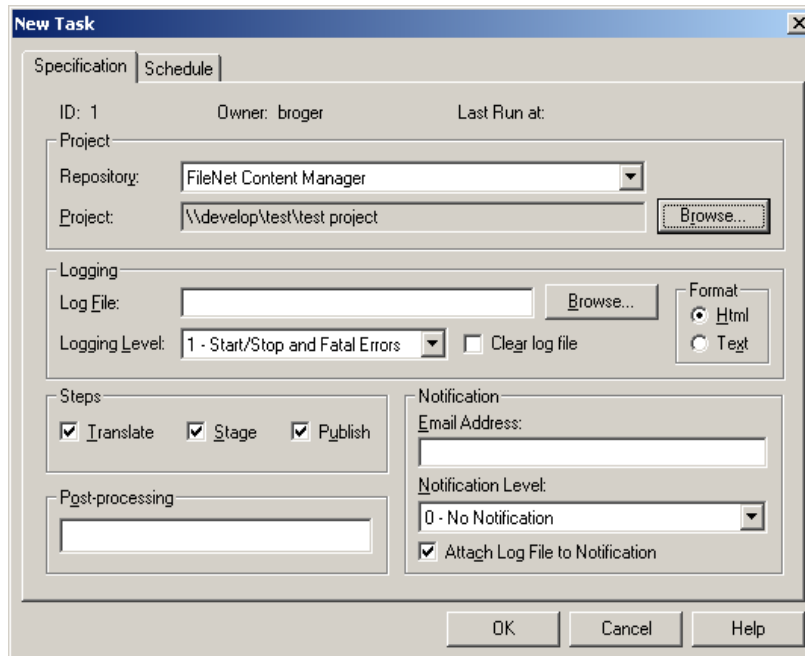


Figure 3-2 The Specification tab dialog of the New Task dialog box in Document Publisher Scheduler.

2. In the Specification tab dialog, select **FileNet Content Manager** or **FileNet Content Services** from the Repository drop-down list, and click **Browse** opposite the Project field to open the Select a Project dialog box.
3. Select the project file you want to schedule and then click **Open**.
The Select a Project dialog box closes, and you are returned to the New Task dialog box.
4. In the Log File text box, choose a directory and name for a log file that you would like to have a report of your translation written to.

This information is from the perspective of the server machine. So if you choose a directory such as C:\My Documents, your log file will be written to the

Server's local drive, in the directory My Documents. Choose a drive and directory that is accessible by both the Server and your login. You may want to consult your network administrator for this information.

Use UNC paths rather than DOS paths, as these are more universal and users will not have to worry about whether or not they are using the same drive mappings as the server.

Example: **..\\News\\Share** might be the UNC equivalent of drive **S:**.

To ensure that you use an UNC path, always use the Browse button opposite the Project text box to select the project file, and always start your search from Network Neighborhood in the Open dialog box (you can use the Look In drop-down box to locate Network Neighborhood). Starting your search from Network Neighborhood will ensure that a UNC path is returned in the Project text box in the New Task dialog box.

5. Set a logging level. (For more on logging, see the notes at the end of this section and also in Chapter 6, "Setting project and application options." The online Help system also explains the options available here.)
6. Under Format, accept the default HTML (to create a log file in HTML format for viewing in your browser) or select Text instead.
7. Under Steps, select the appropriate check boxes for the steps you want Document Publisher Server to complete when the project is run.

If you select Translate, the project will be automatically updated first. You can select all three check boxes, but you will lose the advantage of staging if you do so. To both stage and publish your project, you will want to schedule two tasks. In the first task, you would schedule the project for the sequence Translate–Stage (and thus select the **Translate** and **Stage** check boxes). For the second task, you would want to select only the **Publish** check box.

If you have not staged your project and want only to publish, you would select the **Translate** and **Publish** check boxes. Conceivably, you might want to check only **Translate**.

8. Under Notification, complete the required information if you want Document Publisher Server to automatically generate an email notification each time the task runs. See "Sending an email notification for a task" on page 27 for more information.
9. In the Post-processing field, enter the name of the executable file that will trigger any post-processing activity, immediately the project has run. (You need enter only the file name if the executable resides in the root of the installed directory for Document Publisher Server; otherwise, enter a full path.)

To schedule the task

1. Click the **Schedule** tab to open that tab dialog (see Figure 3-3).
2. Schedule a time for your project to run.

Note that the scheduling times are set up in increments of a minute. If you select Every, the default setting of 1:00 represents one hour. With this option you should also specify the time period during which the task should be run.

3. Click **OK** to return to Document Publisher Scheduler, where the new task is now listed in the task list.

Repeat the above steps for the Specification tab dialog, and also these for the Schedule tab dialog, to schedule other projects for translation. When your task

list is complete, click the Close box on the title bar or choose **Exit** from the File menu.

If you prefer, you can quickly test a scheduled task to see that it will run smoothly without warnings and errors at the scheduled time. (See “Testing a scheduled task” on page 31.)

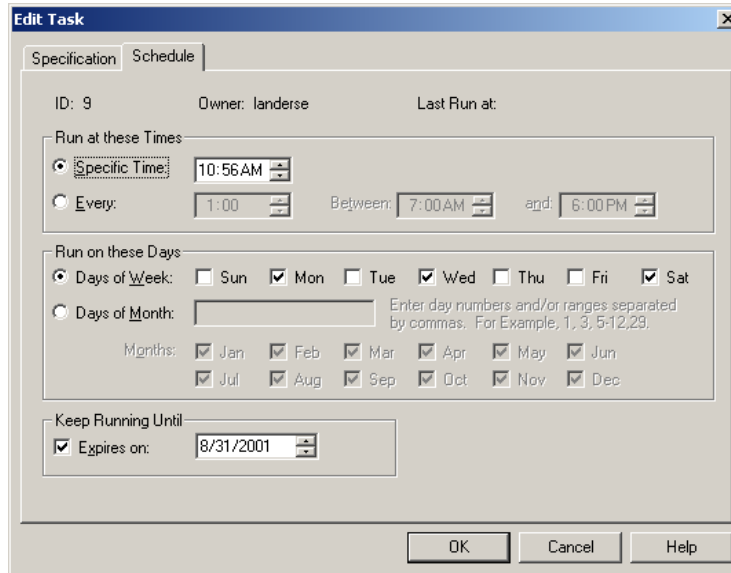


Figure 3-3 The Schedule tab dialog of the New Task dialog box, where you schedule the project.

Notes

- The log file you create in the New Task dialog box (on the Specification tab dialog) is the “translation log” for the scheduled project. It is the same log file you would get if you ran a translation at your workstation, using FileNet Document Publisher. You must set the path and file name under Logging, because any logging information set in the Application Options dialog box in FileNet Document Publisher is user-specific for a given machine and is not saved to the project file. If a log file is not specified here, none will be created.
- In addition to the “translation log” specified in Document Publisher Scheduler, you can also have a “server log,” which is geared toward the server administrator and which you specify in Document Publisher Server. See Chapter 6, “Setting project and application options” on page 77.
- When you use Document Publisher Scheduler to schedule a project for translation by Document Publisher Server, you cannot have that project open in Document Publisher Station during translation; otherwise, a sharing violation will occur.
- If your project file is on the file system, Document Publisher Server will automatically overwrite the current version of the file after it completes the translation.

Sending an email notification for a task

Each time a scheduled task runs on Document Publisher Server, an email can be automatically generated to confirm how successfully the task has been translated, staged, or published. You can also attach the translation log file to provide additional information on how the task ran.

Email can be sent to anyone within the organization, but you will likely want the webmaster to be alerted on the outcome of translation, staging, and publishing.

To configure Document Publisher Server to send email notifications

1. From the Windows Control Panel, double-click the FileNet Document Publisher Server icon to open the FileNet Document Publisher Server dialog box.
2. Click **Notifications** to open that tab dialog. Figure 3-4 shows the default settings, which you may have accepted during installation.
3. Under Mail Server Configuration, enter the address of your mail server in the **Mail Server** text box, such as **mail.company.com**.
4. Under **SMTP Port**, accept the default of 25 or, if necessary, enter a different port number.
5. In the **Notification sender email address** text box, enter the email address that represents the message sender. This may be a general mailbox, such as **websupport@company.com**. The email address entered here will be listed as the sender each time Document Publisher Server generates a notification email message.

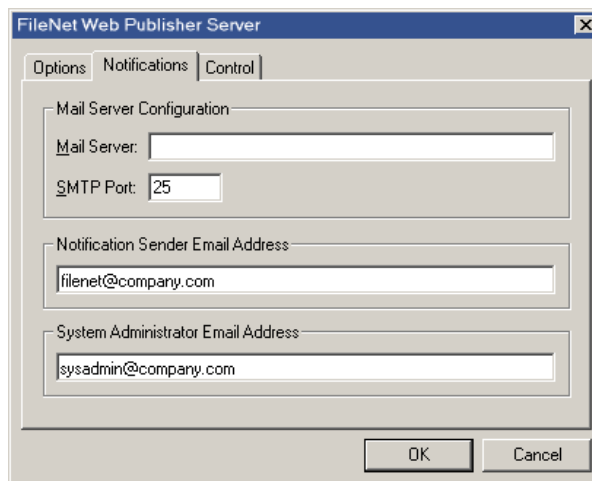


Figure 3-4 The Notifications tab dialog of the FileNet Document Publisher Server dialog box, where you configure email notification for tasks.

6. In the **System administrator email address** text box, enter the email address of the system administrator if you want Document Publisher Server to send an email notification message to this address each time certain server errors occur. This may be a general mailbox, such as **sysadmin@company.com**, or any valid email address in the organization. This address is optional. If you provide it, the addressee will be notified by email of any server errors that occur when the task runs.
7. Click **OK**.

Notes

- An email notification on server errors contains information similar to that found in the server log.
- Even if you do not want Document Publisher Server to generate email notification on server errors, you must enter information in the Mail Server Configuration and Notification Sender Email Address text boxes, since this

information determines the mail server and sender address that Document Publisher Server uses when sending all email notifications.

- To send an email notification for a particular task, you must set options for that task in the New Task or Edit Task dialog box of Document Publisher Server, as described in the following section.

To set up an email notification for a task

1. In the Document Publisher Scheduler main window, click **New** on the Task menu to open the New Task dialog box, or select an existing task and click **Edit** on the Task menu to open the New Task or Edit Task dialog box (see Figure 3-5).

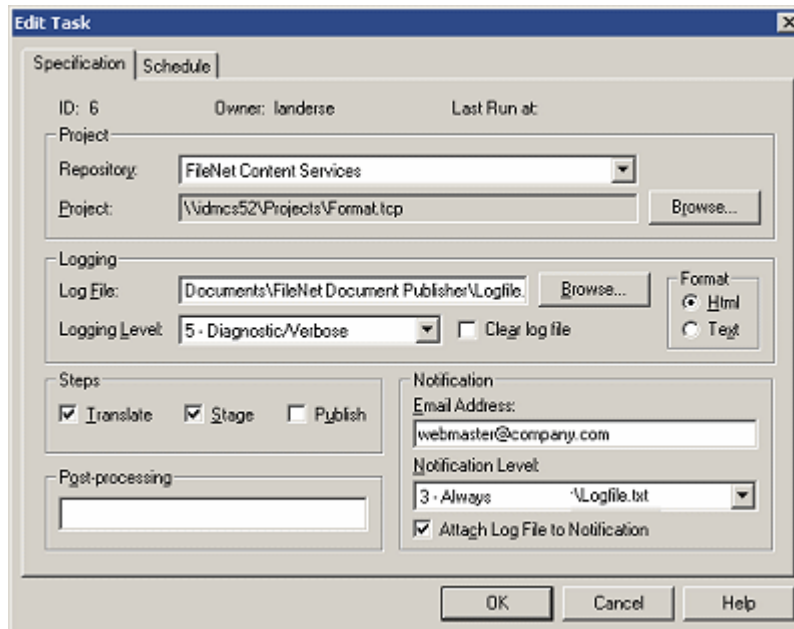


Figure 3-5 The Specification tab dialog of the New Task dialog box, where you set up email notification for a task.

2. Under Notification, in the **Email Address** text box, enter the email address of the person who will be notified of the publication status, such as **webmaster@company.com**. You can enter only one address in this field.
3. Under Notification, from the **Notification Level** drop-down list, select the level of notification you want to use for the task being scheduled.

Level	Description
0 - No notification	No email is generated.
1 - Notify on errors	Notification of errors that occur during translation, staging and publishing.
2 - Success with output	Notification of errors that occur when output is generated during translation, staging and publishing, <i>and</i> Notification when output is generated and translation, staging and publishing succeed. When you select this level you will receive an email only when output is generated as a result of a task being run.
3 - Always	Notification of all errors and successes that occur during translation, staging, and publishing.

The information contained in the email is a summary of the translation log file. The following example displays the body of an email notification message for a task where the level was set to **3 – Always**:

```

Task = 3
Project = \\DEVELOPMENT\share\David\FirstWML.tcp
Time Last Run = 10/2/00 1:35:45 PM

Status = Succeeded
Status Code = 0x00000000
Number of Errors = 0
Number of Warnings = 2

Number of Input Files = 1
Number of Output Files = 1
Number of Staged Files = 0
Number of Published Files = 0

Message: Success

```


- If you want to attach a log file, select **Attach Log File to Notification**. (You must also specify a log file and set the logging level under Logging.)
- Click **OK**.

Notes

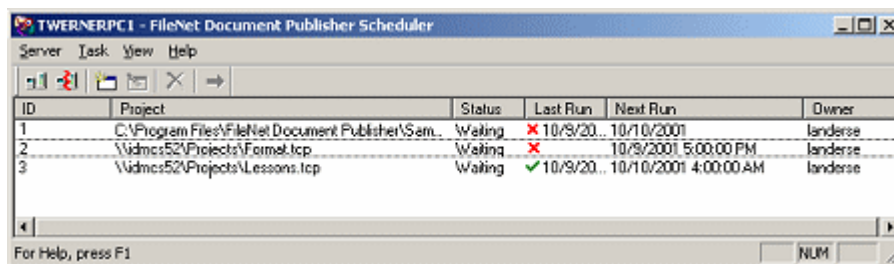
- To send an email notification for a task, you must also set mail server, port, and sender information in the Document Publisher Server dialog box, as explained above, in “To configure FileNet Document Publisher Server to send email notifications.”
- You can include the same project in more than one task (but only one project in each task). For example, you may want to set up email notification for a task that directs Document Publisher Server to translate and stage a project when it is run, and set notification for a different task that is set to publish the project at a later date.

Testing a scheduled task

You may want to test a task before its scheduled time to run to be sure that there will be no problems when the task runs later, at the scheduled time. You can do this at any time before the scheduled time, including when you first add the project to the task list. (However, you cannot test a task on the task list that has expired.)

1. In the Document Publisher Scheduler window, select the task you want to test.
2. Click **Run** on the toolbar or choose **Run**  from the Task menu (or right-click the task and choose **Run Task** from the popup menu).

The Last Run column indicates progress as the task runs. It displays a green check mark to denote that the task has run successfully or a red cross to denote that the task has not run successfully. In either case, the time of the test also appears in the column. (See Figure 3-6.)



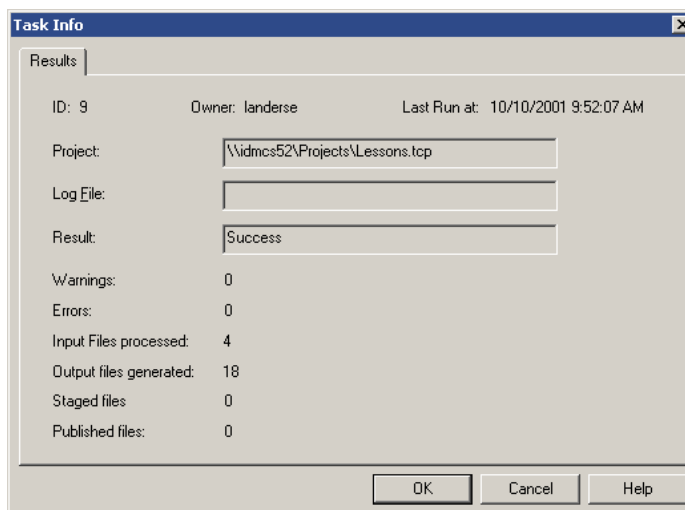
ID	Project	Status	Last Run	Next Run	Owner
1	C:\Program Files\FileNet Document Publisher\Sem...	Waiting	✗ 10/9/20...	10/10/2001	landerse
2	\\widms52\Projects\Format.tcp	Waiting	✗	10/9/2001 5:00:00 PM	landerse
3	\\widms52\Projects\Lessons.tcp	Waiting	✓ 10/9/20...	10/10/2001 4:00:00 AM	landerse

Figure 3-6 On this task list, the Last Run column reveals that tasks 1 and 2 failed to run successfully the last time and that task 3 has run successfully.

A task might fail to run for different reasons. For example, the project file may no longer exist or the machine on which Document Publisher Server is running does not have access to the repository where the project file resides.

You can easily obtain preliminary information on any task that has run (or failed to run).

3. Right-click the task in the task list and choose **Info** from the popup window. The Task Info dialog box opens (see Figure 3-7).



Results		
ID:	9	Owner: landerse Last Run at: 10/10/2001 9:52:07 AM
Project:	\\widms52\Projects\Lessons.tcp	
Log File:		
Result:	Success	
Warnings:	0	
Errors:	0	
Input Files processed:	4	
Output files generated:	18	
Staged files:	0	
Published files:	0	

Figure 3-7 This project has run successfully without warnings or errors.

The Task Info dialog box provides a preliminary account of how the task has run. You should always check the log file in the event that a task fails to run successfully, or has run successfully but with warnings or errors.

Managing the task list

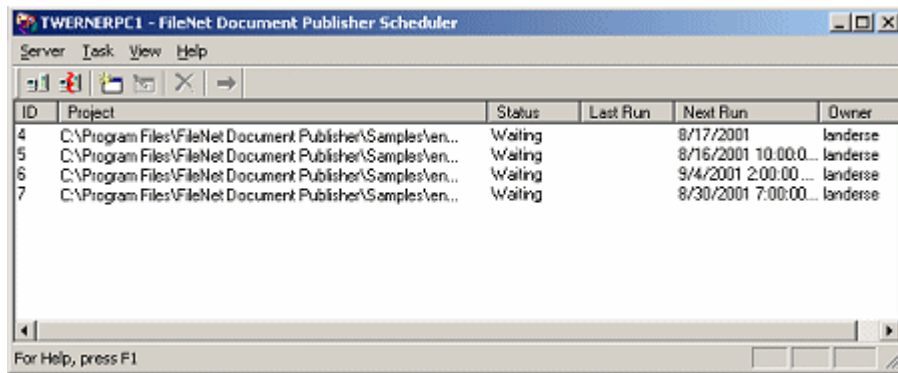
Projects can be added to the task list by users at workstations throughout the organization. Unless the webmaster is set up as a superuser, however, he will not be able to view all of the tasks on the list.

To accomplish this, the webmaster must create a new DWORD value for the following Key in the Registry:

HKEY_CURRENT_USER\Software\Stellent\Content Publisher\Scheduler\6.0\Settings

The Value Name of the DWORD is “superuser” and its Value Data is 1.

You can manage the task list in Document Publisher Scheduler very easily. As superuser, your privileges include the ability to edit tasks but not to change their ownership. A simple task list (with all the project files in the file system) is shown in Figure 3-8.



The screenshot shows a window titled "TWERNERPC1 - FileNet Document Publisher Scheduler". The window contains a table with the following data:

ID	Project	Status	Last Run	Next Run	Owner
4	C:\Program Files\FileNet Document Publisher\Samples\ven...	Waiting		8/17/2001	landerse
5	C:\Program Files\FileNet Document Publisher\Samples\ven...	Waiting		8/16/2001 10:00:0...	landerse
6	C:\Program Files\FileNet Document Publisher\Samples\ven...	Waiting		9/4/2001 2:00:00...	landerse
7	C:\Program Files\FileNet Document Publisher\Samples\ven...	Waiting		8/30/2001 7:00:00...	landerse

Figure 3-8 FileNet Document Publisher Scheduler, showing the task list with two projects each scheduled twice (once for staging, once for publishing).

The window displays key information about tasks on the task list, as follows:

ID — The project ID is assigned by Document Publisher Server. It is used simply to distinguish between the tasks that are run.

Project — The path and name of the project file that has been added to the task list.

Status — The status of the task at any time. A task can be in one of five states:

- Waiting - The task is awaiting its appointed time to run.
- Pending - The task is ready to run, once other projects are completed.
- Running - The task is currently running.
- Expired - The task has run the required number of times and is not scheduled to run again.
- Locked - The task schedule is currently being edited by another user.

Last Run — The date and time the task last ran. A green check mark denotes that the task has run successfully, while a red cross denotes that it has not.

Next Run — The date and time the task is scheduled to run next.


Owner — The login name of the user who scheduled the task.

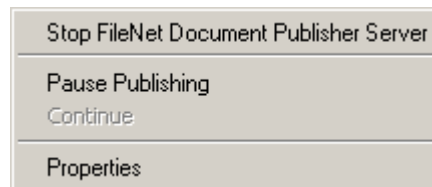
Pause Publishing command

You can use the Pause Publishing command to temporarily halt all translations scheduled to run on Document Publisher Server. Once you pause publishing, Document Publisher Server will continue to accept the scheduling of projects, but it will not translate any tasks until you choose the Continue command. You may want to use the Pause Publishing feature when your server is experiencing significant activity and other tasks take priority over your web publishing efforts.

Pause publishing works a little differently, depending on whether Document Publisher Server is installed as an OLE Automation server or as a Service.

To pause publishing when running Document Publisher Server as an OLE Automation server


1. Right-click the FileNet Document Publisher Server icon  1:24 PM on the Windows taskbar to display the FileNet Document Publisher Server popup menu.



2. Click **Pause Publishing**.

The popup menu closes. FileNet Document Publisher Server will pause all scheduled translations until you decide to continue.

To continue publishing after having paused

1. Right-click the FileNet Document Publisher Server icon  1:24 PM on the Windows taskbar to display the FileNet Document Publisher Server popup menu. Since you are in a pause state, the Pause Publishing command is now grayed out and the Continue command is now available.
2. Click **Continue**.

To pause publishing when running Document Publisher Server as a Service

If FileNet Document Publisher Server is set up to run as a Service, the FileNet Document Publisher Server icon is not available from the taskbar. In that event, you can activate the Pause Publishing command in the following way.

1. Click **Settings** on the Windows Start menu, and choose **Control Panel** from the submenu.
2. Double-click the **FileNet Document Publisher** icon, to open the FileNet Document Publisher Server Properties dialog box.
3. Click **Control** to open that tab dialog (see Figure 3-9).
4. Click **Pause Publishing** to pause the publishing process.
5. Click **OK**.

When you are ready to continue publishing, return to this tab dialog and click Continue.

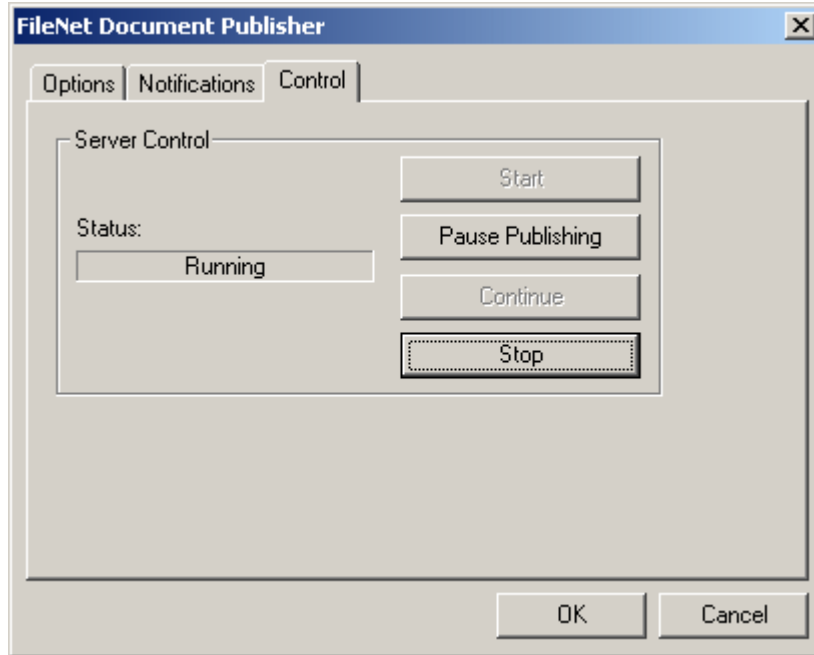


Figure 3-9 The Control tab dialog in the FileNet Document Publisher Properties dialog box, which is available only when you run FileNet Document Publisher Server as a Service.

To suspend an individual task

Finally, on occasion you may decide to temporarily suspend the translation of a particular project, one that is scheduled for translation at a regular time each day.

1. Select the project in Document Publisher Scheduler, and choose **Edit** from the Task menu to open the Edit Task dialog box.
2. Click **Schedule** to open that tab dialog, and under Keep Running Until, click the **Down** control for the list box in order to change the Expires On date to yesterday's date.
3. Click **OK** to return to the Document Publisher Scheduler main window. The Status column opposite the project will shortly read Expired.

Thus, without changing any of the settings for running this project, you have temporarily stopped the project from being translated. You can reschedule it at any time by re-entering the Edit Task dialog box and changing the Expires On date to an appropriate time in the future.

CHAPTER 4

Project setup in a FileNet repository

If you worked through the “Seven Easy Lessons” and the Tutorial, completing some or all of those exercises, you should now be familiar with how FileNet Document Publisher Station works in the file system. With FileNet Content Manager or FileNet Content Services installed, you are more likely to be taking source files from a FileNet repository and publishing to that repository. You can also use the FileNet repository to store the project files you create. Figure 4-1 depicts the more sophisticated environment you are working in.



Figure 4-1 You can add source files from FileNet Content Manager or FileNet Content Services to a project and publish back to the repository or directly to a web server. You can also save project files in the FileNet repository.

In this chapter we will review in detail how project setup differs when Document Publisher Station is used with a FileNet repository. The review will also address dynamic Directory Items and compound documents (for FileNet Content Services), and the ability to fine-tune the manner in which property values and security settings are applied to published output.

In short, you will learn about

- Creating a project file in a FileNet repository
- Adding source documents from a FileNet repository
- Adding a compound document
- Adding a Directory Item from a FileNet repository
- Adding a dynamic Directory Item
- Adding a Directory Item from a stored search
- Filtering and sorting Directory Items using metadata
- Translating source documents
- Updating source documents

You will also learn about

- Specifying a version of a source document

- Opening a project file from a FileNet repository
- Adding a version control feature

Chapter 5, “The Publishing Process,” covers in detail the dual-publishing capability of FileNet Document Publisher. It explains how to set up staging and publishing options, stage and publish a project to FileNet Content Manager or FileNet Content Services, and also how to output directly to a web server.

Note: If you are using FileNet Content Services, you must have IDM Web Services installed if you are to successfully browse published pages in Content Services.

Creating a project file in a FileNet repository

Creating a project file in a FileNet repository is similar to creating one in a file system. The essential difference is that by saving the project file to the repository, instead of to the file system, you take advantage of FileNet’s security, versioning, and other features.

The first set of steps is for FileNet Content Manager, and the second set of steps is for FileNet Content Services.

To create a project file in FileNet Content Manager

1. With a new project started in Document Publisher Station, click **Save** on the File menu. The Select a Repository dialog box opens.
2. Choose **FileNet Content Manager** from the Repository drop-down list and click **OK**.
Note: If you are entering FileNet Content Manager for the first time (during your session in FileNet Document Publisher), the FileNet Content Manager Login dialog box opens. Complete the required information to gain access to the repository and click **Sign In**.
3. In the Save Project File dialog box, select a folder (within an object store) where you want to save the project. Then click **Next**.
4. Select a document class for the project file. Then click **Next**.
5. Specify the properties for the project (Document Title, Publish Status, Description, etc.). Then click **Next**.
6. Accept the security that will be assigned to the project file (or remove a user or group from the list). Then click **Finish**.
7. Click **OK** to return to the main window in Document Publisher Station.

You have now saved your project file to the repository. The project file name, including the .tcp extension, now displays in the title bar.

To create a project file in FileNet Content Services

1. With a new project started in Document Publisher Station, click **Save** on the File menu. The Select a Repository dialog box opens.
2. Select **FileNet Content Services** from the Repository drop-down list and click **OK**. The Save Project File dialog box opens.
3. Select the library you want to use and click **Open**. If you are entering FileNet Content Services for the first time, the FileNET Logon dialog box will open. Complete the required information to gain access to the repository, and then

click **OK** to return to the Save Project File dialog box, with the selected library now open.

4. Select the folder in which you want to save the project file.
5. In the Title text box in the Save Project File dialog box, enter the project file name.

If you include the standard **.tcp** extension in the title, you will see it whenever you search for the project file in FileNet Content Services (it is not visible in FileNet Content Manager). Whether you include the extension or not, Document Publisher Station will automatically add it to the underlying file name (which means it will be visible, for example, in the title bar when the project is open in Document Publisher Station).

6. From the Save As Doc Class drop-down list, select the class your organization is using for FileNet Document Publisher project files. (Your system administrator may want to set up a special class for such files.) Click **Save**.
7. In the Properties dialog box, complete the required information.

Note: The contents of this dialog box are determined by how your classes are set up. For example, if your system administrator has created a Comment box, you could enter information that uniquely describes the project file (and thus facilitate future searches for the project file in the repository).

8. Click **Security** to open the Security tab dialog to set the necessary access level for the project file. (Refer to your FileNet Content Services documentation, if necessary.)
9. Click **OK** to return to the main window in Document Publisher Station. You have now saved your project file to FileNet Content Services.

With the project file still open in Document Publisher Station, you can continue project setup. The latest version of the file will be checked into FileNet Content Services each time you use the Save command. In this way, you will be able to maintain version control of the project file.

The history file

When Document Publisher Station creates a project file, it also creates a companion history file, which it uses to track the date and time-stamp of each source document in the project. As a result, when you run an incremental translation, Document Publisher Station translates only those source documents that have been updated since the last translation.

Document Publisher Station creates a history file by appending the **.tch** extension to the name of the project file. Thus, for the project file "Project," Document Publisher Station will create the history file "Project.tch."

In both FileNet Content Manager and FileNet Content Services, you will always see the project file without its **.tcp** extension. In FileNet Content Manager, the history file is a secondary file of the project document, and as such cannot be viewed in the repository. In FileNet Content Services, the history file is a separate document and can be seen in the repository with its **.tch** extension.

Do not delete the history file. In fact, you can safely ignore it. When you open a project file, Document Publisher Station automatically checks out both the project file and the history file from the FileNet repository and creates working copies of the files (just as it does with source documents, as explained in the next section). And when you close a project, Document Publisher Station automatically creates a new

version of the history file in the FileNet repository. (It updates the project file each time you save.)


Note: Always check the project file out of the FileNet repository. If you download a local copy of the file and publish, this will result in duplicate files because a new history file will be created.

Adding source documents from a FileNet repository

Once you have created and saved a new project file, you are ready to create your publication hierarchy and add source documents, Directory Items, and reference pages to the project.

When you add documents that reside in FileNet Content Manager or FileNet Content Services, you do not check out those documents as you do in your normal use of the FileNet repository. Rather, Document Publisher Station identifies the current version of each document when it is added to the publication and obtains a working copy of that version for translation. As a result, someone else may check out one or more of those documents during your session in Document Publisher Station, between the time you start your project and are ready to publish. That is why you may want to use the Update Versions command before your final translation.

To add a source document to a publication

1. Select **Document** on the Add menu or click **Add Document**  on the standard toolbar.
2. In the Select a Repository dialog box, select **FileNet Content Manager** or **FileNet Content Services** from the drop-down list and click **OK**.
Note: If this is the sole source of documents, you can choose **Don't show this dialog box again**.
3. In the Add Document dialog box, browse to the desired document and click **Select Current Version** (for FileNet Content Manager) or **Open** (for FileNet Content Services).
4. In the Choose Template dialog box, select the template you want to use. (The preview changes to reflect the graphics Set associated with this template.)
5. Click **OK** to return to the main window. The document selected from the repository is now listed in the Contents pane.

Repeat the above steps to add more documents to the project.

Notes

- Templates can be imported from, or exported to, Content Manager or Content Services. Also, linked templates can reside in the FileNet repository, as can associated files. (For more on templates, see “Managing templates,” Lesson 10 of the Tutorial.)
- If you change the location of a source document in Content Manager or FileNet Content Services, Document Publisher Station should be able to locate that document the next time it is needed for translation, assuming the document has been moved within the same object store or library. (If the document ID

changes, then Document Publisher Station will not be able to find the document.)

- If you are adding documents from Content Manager, only those with the Publish status can be previewed in the Choose Template dialog box. If you try to add a document with the Draft status, you will receive an error message.

Adding a compound document

If your repository is FileNet Content Services, you can add a compound document to your project in Document Publisher Station, just like any other source document. (This option is not available in FileNet Content Manager.) When Document Publisher Station translates the compound document, whatever relationships exist within the document are preserved.

Include children of compound documents, the default setting that ensures this, can be found in the Options tab dialog of the Document Properties dialog box, as shown in Figure 4-2. (Right-click the document in the Contents pane and click Properties on the popup menu.)

Note: This option is also available when you add a Directory Item, which you can see in the Properties dialog box for Directory Items (where the setting is also turned on by default). See “Adding a Directory Item from a FileNet repository” on page 41.

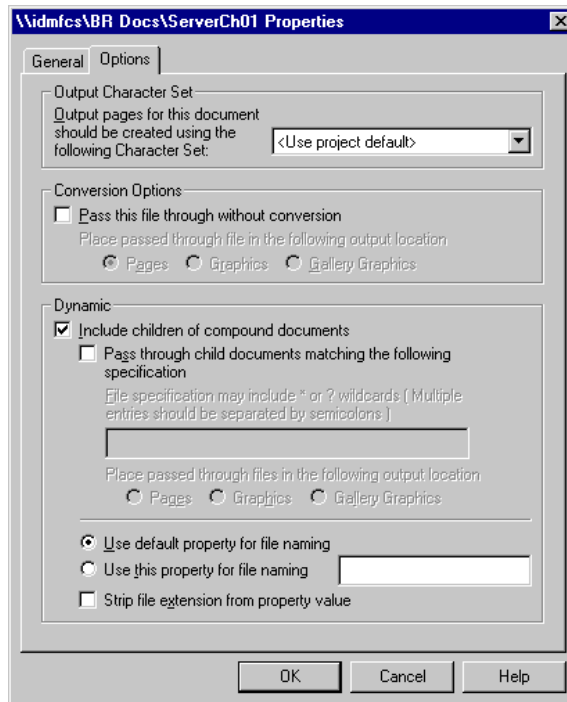


Figure 4-2 The Include Children of Compound Documents option is turned on by default so that FileNet Document Publisher Station automatically handles compound documents during translation. These options are only available when you are using FileNet Content Services.

A compound document is, in effect, two or more documents where one serves as the “parent” and the others serve as the “children.”

Typically, there are two kinds of compound documents:

- **Linked OLE object** — When a file containing a linked OLE object is checked into FileNet Content Services, the link recognizer automatically recognizes this

relationship, identifies the “children” (linked OLE objects), and classifies the file as a compound document.

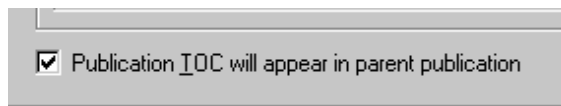
- **Generic** — The relationship between parent and child documents has been created manually. The child documents may be referenced in the parent document or they may be “random” documents associated with the parent. You formally create the compound document when you check it into FileNet Content Services.

In the case of the parent document with one or more linked OLE objects, Document Publisher Station creates the usual output page for the parent document, which contains a graphical representation for each OLE object. It translates the OLE objects separately and places each OLE object in its own output file.

In the generic case, Document Publisher Station again translates both the parent and the child documents and preserves the relationship between them. However, since there may not be a graphical representation of a child document in the parent document, you need a way to make the child documents visible in your web publication. This can be handled in the TOC.

When you add a compound document to a project, Document Publisher Station in effect creates a hidden subpublication for the children of the compound document. The subpublication inherits the properties of the publication in which the compound document resides. So if you create a TOC for the publication that contains the compound document, Document Publisher Station will create a TOC in the subpublication for the children.

In addition, you can view the TOC entries for the compound document separately, if you want. That is, you can make the TOC for the compound document appear in the same frame as the body pages, immediately following the compound document in the viewing sequence. To do this, you need to select the following check box in the Publication Properties dialog box for the publication in which the compound document resides:



You can open this page by clicking the Next button in the output page for the parent document. Such a page will be especially desirable where your compound document contains a “random” child that is simply associated with the parent, not referenced in it in any way.

Notes

- In the generic case, the parent document could be designed solely to create a relationship for the child documents. That is, it could be an empty source document that generates no output. It would be used simply as a placeholder in Document Publisher Station.
- Child documents are not visible in the Contents pane. You see them only when you translate and view your web publication.
- Document Publisher Station creates a hidden subpublication for a dynamic Directory Item in the same way it does for a compound document. See “Adding a dynamic Directory Item” on page 44.

Adding a Directory Item from a FileNet repository

A Directory Item is simply a container for adding multiple source documents to a publication. In the file system, the container can be a directory or folder on a local or network drive. In FileNet Content Manager, the container can be a folder in an object store; in FileNet Content Services, it can be a folder in a library.

When you translate, all source documents at the top level of the container are translated. This is especially useful when you schedule projects for automatic translation by Document Publisher Server. You can add new source documents to the folder at any time and be assured that they will be included in the next scheduled translation. (See “Updating dynamic Directory Items and compound documents” on page 50.)

The feature is potentially more powerful when you add a dynamic Directory Item to your project. (See “Adding a dynamic Directory Item” on page 44.) But first, let us address the straightforward case.

To add a Directory Item

1. Click **Directory Item** on the Add menu to open the New Directory Item Properties dialog box (see Figure 4-3). If the Select a Repository dialog box opens, select **FileNet Content Manager** or **FileNet Content Services** from the Repository drop-down list and click **OK**.

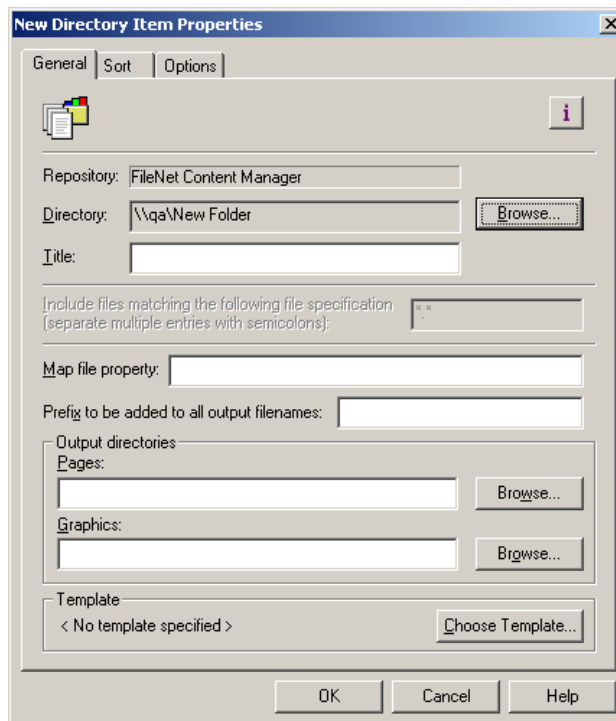


Figure 4-3 The New Directory Item Properties dialog box, where you create a Directory Item. When you choose the FileNet Content Manager or FileNet Content Services repository option, all files in the selected object store or library (as specified in the Directory text box) will be added to your publication.

2. Click the **Browse** button opposite the Directory text box to open the Browse for Folder dialog box.
3. Select the appropriate folder you want to use for the Directory Item.

In the New Directory Item Properties dialog box, the Directory text box lists the path to the folder in the FileNet repository.

4. Under Title, enter the title you want to use for the Directory Item. (You do not have to enter one. If you do, it will help to differentiate between different Directory Items on the Contents pane. It could also be used to populate the titles of your output pages.)
5. In the Map File Property text box, type any string of text you want added to the XML Map file. (With proper customization, such strings can be used to control access to published content on a web site.)
6. In the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this Directory Item. (This is not required.)
7. Under Output Directories, enter names for the output directories you want to use for these source documents.

You can leave these text boxes blank, if you prefer. If you enter paths, these must be for the file system, because when you translate source documents (with the Translate or Translate All command), you can send the output files only to the file system. This is explained in the next section.

Generally, you will not want to enter a full path. By default, Document Publisher Station uses the full paths specified for the root publication and mirrors the publication hierarchy in the structure of the output directories it creates. So in the fields for output directories for a Directory Item, you can simply enter just the names for the output directories you want to use. This will be especially helpful where a publication contains more than one Directory Item, and you want to segregate the output files of the different Directory Items.

8. Under Template, click the **Choose Template** button to open the Choose Template dialog box and select the template you want to associate with the source documents in the Directory Item.

With a Directory Item, all source documents must be associated with the same template.

9. Click **OK** to return to the New Directory Item Properties dialog box.

Note: On the Sort tab dialog of the Directory Item Properties dialog box, you can influence the order in which source files are translated and linked. On the Options tab dialog, you can set conversion options and an extension for output files that will apply only to the Directory Item.

See Lesson 15 in the Tutorial for more information.

To specify file formats

Now that you have set up the Directory Item, you can specify what file formats you want translated. Let us first explore how this is done. (A later section will examine how to filter and sort Directory Items by using metadata.)

1. Click the  button to open the Details dialog box (see Figure 4-4).

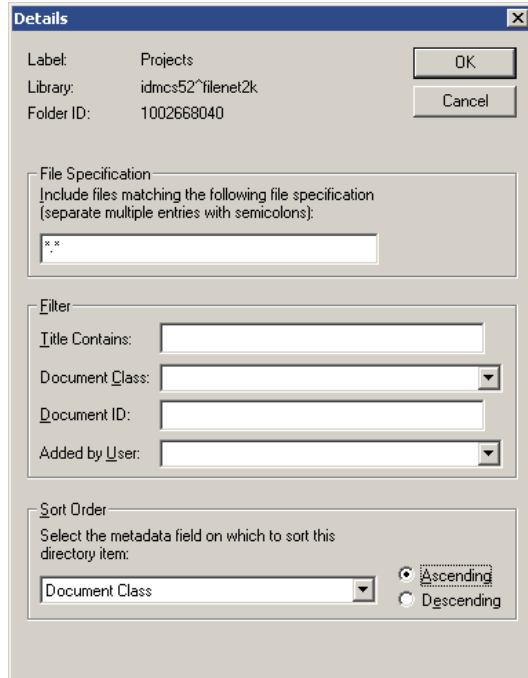


Figure 4-4 In the Details dialog box you can instruct FileNet Document Publisher to translate any combination of file formats. (For an explanation on how to use the Filter and Sort Order options, see “Filtering and sorting Directory Items using metadata” on page 47.)

2. In the text box, enter the appropriate string for the file formats you want Document Publisher Station to translate. Separate multiple entries with semicolons. You can use wildcards to capture files with certain naming conventions.

Example: *sales.xls;Q1*.doc;*.ppt

Document Publisher Station will translate (a) all Excel file names that end with “sales,” (b) all Word file names that begin with “Q1,” and (c) all files created in Microsoft PowerPoint.

3. Click **OK** to return to the New Directory Item Properties dialog box.

One last task is to visit the Option tab dialog.

To specify options

1. Click the **Options** tab to open that tab dialog. (See Figure 4-5.)
Settings in the Options tab dialog allow you to (a) change the file name extension of the output pages, if desired, and (b) set dynamic options.
2. Under Dynamic, select **Include subdirectories** if you want to create a dynamic Directory Item in your project (see “Adding a dynamic Directory Item” on page 44).
3. If you're using FileNet Content Services as the repository, you can select **Include children of compound documents**. This will ensure that FileNet Document Publisher recognizes and preserves the relationships in any compound documents included in the Directory Item (see “Adding a compound document” on page 39).

Note: This option is not available for FileNet Content Manager.

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

Remember: You can always revisit the Properties dialog box later (as you can for any publication or document) to edit the settings.

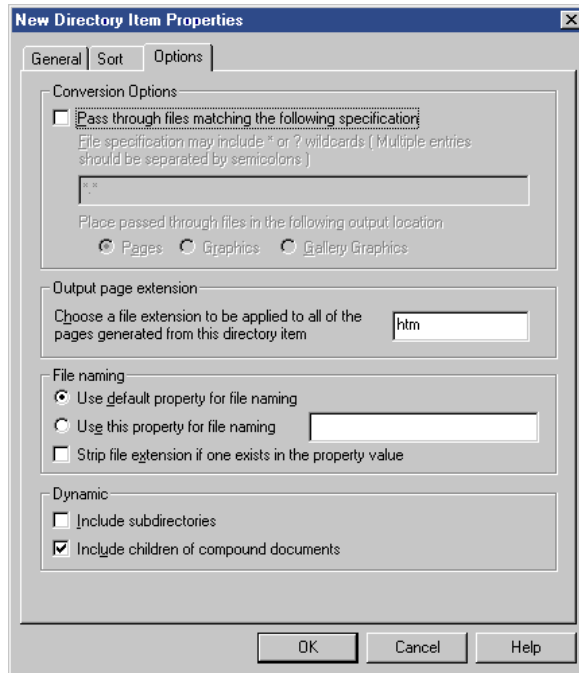


Figure 4-5 The Options tab dialog for a Directory Item. Note the two options under Dynamic.

You have now completed the setup of a Directory Item for a publication. You can add other Directory Items in the same way. If you provide a title in each case, you will be able to distinguish between them in the Contents pane.

Now let us examine the implications of the **Include subdirectories** option.

Adding a dynamic Directory Item

When you add a Directory Item from the file system, you have the potentially powerful option of making the Directory Item *dynamic*. You do this by selecting the **Include subdirectories** option in the Options tab dialog of the New Directory Item Properties dialog box.

If you accept the default setting (by leaving the check box cleared), only individual source documents at the top level of the *specified* folder will be added to the project. That is, you will create a Directory Item in the usual way. However, if you select **Include subdirectories**, Document Publisher Station not only imports the specified folder, but also the hierarchy of folders that the specified folder contains. Moreover, it automatically processes source documents in *all* the folders.

Notes

- Only the parent Directory Item is visible in the Contents pane.
- Document Publisher Station in effect creates a hidden subpublication for the subfolders of the parent Directory Item (just as it does for a compound document). The subpublication inherits the properties of the publication in which the dynamic Directory Item resides.
- If you create a TOC for the parent Directory Item, you are, in effect, creating a TOC for each subfolder—and the contents of the subfolders are promoted so

that the TOC for the parent Directory Item summarizes the complete hierarchy of the dynamic Directory Item.

- Promotion and linking specified in the template for the TOC of the parent Directory Item apply to all subfolders. Likewise, any reference pages you assign to the parent Directory Item (as well as any files associated with the parent) are automatically inherited by the subfolders, too.
- Document Publisher Station includes in translation any new subfolders added to the hierarchy in the future. This can be handled automatically (see “Updating source documents” on page 49”).
- Stored document searches within the selected stored search (see next section) are picked up as subpublications when dynamic Directory Items are enabled. If the stored search subpublication contains additional stored searches, however, they will not be picked up by Document Publisher Station. (In other words, stored searches can only go one level below the Directory Item stored search in order to be included in your publication.)

The Folder Import wizard

It is worthwhile comparing the dynamic Directory Item with the Folder Import wizard. Like the dynamic Directory Item, the Folder Import wizard can import a portion of an object store hierarchy in FileNet Content Manager or a library hierarchy in FileNet Content Services (or a portion of the file system). However, there are important differences:

Whereas the dynamic Directory Item is *dynamic*, the Folder Import wizard is *static*. That is, while Document Publisher Station recognizes any new folders added later to the hierarchy of a dynamic Directory Item, it ignores any new folders added later to the hierarchy imported by means of the Folder Import wizard.

Only the parent Directory Item of a dynamic Directory displays in the Contents pane, but the individual Directory Items imported by means of the Folder Import wizard can be seen in the Contents pane, depending on which subpublication (folder in the hierarchy) is selected in the Publication Hierarchy pane.

Since you can see only the parent Directory Item of a dynamic Directory Item, the same template and settings must be applied to all folders and documents in a dynamic Directory Item. Since you can see the individual Directory Items that result from importing a folder hierarchy with the Folder Import wizard, you can apply different templates and settings to each Directory Item in the hierarchy.


(The dynamic Directory Item option is turned off by default. However, you can turn on this option at any time.)

Adding a Directory Item from a stored search


If your repository is a FileNet repository, any search you perform in the repository can be saved as a stored search, making it easier to perform the same search again in the future. Stored searches (see Note 1) can be added to Document Publisher Station as a Directory Item, much like a folder can. Any new documents added to the FileNet repository with the same stored search criteria will be included in the Directory Item.

Note: For more information on creating stored searches, see the FileNet Workplace Help or the FileNet IDM Desktop User's Help.

To add a stored search from FileNet Content Manager

1. Click **Directory Item** on the Add menu to open the New Directory Item Properties dialog box.
2. Select **FileNet Content Manager** from the Repository drop-down list.
3. Opposite Directory, click **Browse** to open the Browse for Folder dialog box.
4. Browse to the stored search file  in FileNet Content Manager and select it.
Note: The stored search must be created ahead of time using FileNet Workplace before you can select it in this dialog box.
5. Choose a template for your directory item and click **OK** to return to the main window.

To add stored search from FileNet Content Services

1. Click **Directory Item** on the Add menu to open the New Directory Item Properties dialog box.
2. Select **FileNet Content Services** from the Repository drop-down list.
3. Opposite Directory, click **Browse** to open the Browse for Folder dialog box.
4. Click **Stored Search** to open that dialog box.
5. Browse to your stored search file  in FileNet Content Services and then click **Open**.
Note: The stored search must be created ahead of time using FileNet IDM Desktop before you can select it in this dialog box.
6. Choose a template for your directory item and then click **OK** to return to the main window.

Notes


- A stored search is a file that contains saved search criteria in the FileNet repository. For more information on creating stored searches, see the appropriate FileNet repository documentation.
- Document Publisher Station includes in translation any new documents that are added to the FileNet repository with the criteria specified in the stored search. To update the new source documents, see “Updating source documents” on page 49.
- Stored document searches within the selected stored search are picked up as subpublications when dynamic Directory Items are enabled (see “Adding a dynamic Directory Item” on page 44). If the stored search subpublication contains additional stored searches, however, they will not be picked up by Document Publisher Station. (In other words, stored searches can only go one level below the Directory Item stored search in order to be included in your publication.)

Filtering and sorting Directory Items using metadata

When you add a Directory Item to a publication, you can determine the documents to include based on simple metadata. For FileNet Content Manager, this is the metadata found in the My Search>For Documents page of the FileNet Workplace: Filter by Class, Document Title, and Creator. For FileNet Content Services, this is the metadata found on the Simple Find tab dialog of the FileNet IDM Find feature. Such metadata includes Title, Document Class, ID, and Added by User.

Furthermore, you can sort the order of those documents, ascending or descending, based on the same metadata. The order is important because it will determine how the output files are linked and the order in which the web pages you create can be browsed onscreen.

To filter or sort Directory Items based on metadata

1. Right-click the Directory Item in the Contents pane and choose **Properties** from the popup menu.
2. In the Document Properties dialog box, click the  button to open the Details dialog box. (See Figure 4-4.)
3. If you want to include files matching certain criteria, replace *.* in the File Specification text box. Separate multiple entries with semicolons.
Example: *.doc;*.123;*.wpd
4. Under Filter, enter the metadata for Title, Document Class, ID, and Added by User.
5. Under Sort Order, choose a metadata field on which to sort the Directory Item, and then select Ascending or Descending.
6. Click **OK** to close the Details dialog box, and click **OK** again to return to the main window.

Notes

- In order to sort Directory Items based on metadata, you must first disable sorting by file attribute. You can do this by selecting **Do not sort this directory item** on the Sort tab of the Directory Item properties dialog box.
- When adding a Directory Item from the file system, the File Specification field is provided in the New Directory Item Properties dialog box, not the Details dialog box.

Translating source documents

Once you have set up your project in Document Publisher Station, you will initially follow the two-step sequence of *Translate-View* as you fine-tune your templates and other settings to create your web publication. In fact, you will probably use this sequence repeatedly until you are satisfied with your publication structure, the formatting of source documents, and the content and formatting of reference pages.

You learned about translation in the Seven Easy Lessons and the Tutorial. Since you always translate to the file system, the translation issues with Document Publisher Station are essentially unchanged. Here are reminders of some setup issues you

may need to review before you update your project, as discussed in the next section:

1. When you create a new project, Document Publisher Station uses default output directories, which means that you can translate as soon as you add one or more source documents to your publication. However, you may want to use a different location for your translated output.
2. You specify output directories in the Publication Properties dialog box. Right-click the root publication and choose Properties from the popup menu to open the dialog box. The default directory shown in Figure 4-6 applies when running Document Publisher Station on Windows 2000 or Windows XP.
3. When Document Publisher Station translates source documents and generates any reference pages you have added to the project, it places all output files in the specified output directory, using a hierarchy that matches the hierarchy in the Publication Hierarchy pane (unless you specify otherwise).
4. You can create a special output directory for graphics from the Gallery by selecting the **Use gallery graphics directory** check box and entering a full path for the directory. Large projects, in particular, will benefit from this because you will avoid the duplication of graphics used for navigation. This option is available only in the Publication Properties dialog box for the root publication.
5. The Translate command on the large toolbar is for an incremental translation. The first time you translate a project, Document Publisher Station translates all the source documents in the project. Thereafter, it recognizes those that have been updated and translates only those. (The next session addresses in detail the process of formally updating your project.)
6. If a FileNet Document Publisher project that is scheduled to run on Document Publisher Server has references to object stores in FileNet Content Manager or libraries in FileNet Content Services, you will need a user name and password to access them. (See “Registering a user name and password” in Chapter 3 of the Installation Guide.)

With your translated output in the file system, you can experiment with template settings and the like until you are ready to publish to your FileNet repository (or directly to a web server). When you finally publish, Document Publisher Station makes copies of the output files in the staging area (the output directories), fixes up the URLs to point to IDs, and places the files in location in your repository specified in the Publish Options dialog box.

A key step before finally publishing is updating the source documents and Directory Items in your project.

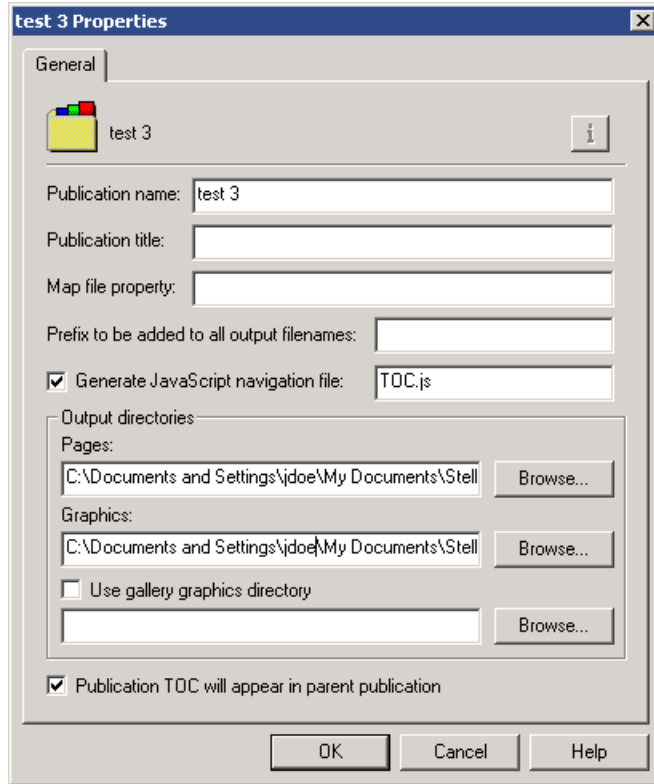


Figure 4-6 The Publication Properties dialog box, where you specify output directories in your file system for translations.

Updating source documents

As noted, *Translate–View* is the two-step sequence you follow to create a web publication in Document Publisher Station. When you are satisfied with the publication and are ready to publish, you use the three-step sequence *Update Versions–Translate–Publish*.


Update Versions reviews the status of your selected source documents in Content Manager or Content Services and on the file system, and identifies any that have been checked out and revised since you first added them to your publication. If newer versions exist, Document Publisher Station updates the recorded version number of each document. Unless you have specified that a particular version be used, it creates a new working copy the next time you translate.

Note: Source documents in a FileNet repository must have their Publish status set to "Publish" in order to be translated.

After each update, you will want to use the **Translate** command again, to generate updated translated output on the file system. (You may also want to *View* your publication one last time before you publish.)

With the **Publish** command, Document Publisher Station copies all files in the file system to the location in Content Manager or Content Services specified in the Publish Options dialog box. It fixes up URLs to make them relative so that the files can be accessed later on a Web server.

Using the Update Versions command

To update a project, click **Update Versions**  on the toolbar or choose **Update Versions** from the Run menu. This will update *all* source documents in the project. To update only certain source documents, select a subpublication in the Publication Hierarchy pane and highlight one or more Directory Items or source documents in the Contents pane (you can use your Ctrl key and mouse to select multiple documents). Then right-click and choose **Update Versions** from the popup menu.

Notes

- When all the source documents are from the file system and any Directory Items are not dynamic, you do not need to use the Update Versions command. Simply translate. Otherwise, always use the Update Versions command.
- You may not always want to use the latest version of a document. If you specify a version, the document will not be subject to updating by the Update Versions command and the specified version of the document will be used each time you translate. See “Specifying a version of a source document” on page 51.

Updating dynamic Directory Items and compound documents

When your project contains dynamic Directory Items or compound documents, whether or not their source is the file system or FileNet Content Manager or FileNet Content Services, you must use the Update Versions command. This is because Document Publisher Station not only checks for the newest version of each source document, but also for any structural change in the dynamic Directory Item or compound document.

If you have added a new folder to a dynamic Directory Item since the last time you translated, Document Publisher Station will recognize this and include the new folder in the next translation. Likewise, it will recognize any change in a compound document (for example, where a child document has been added or removed).

When a project contains a dynamic Directory Item or compound document, Document Publisher Station displays the following reminder when you translate.

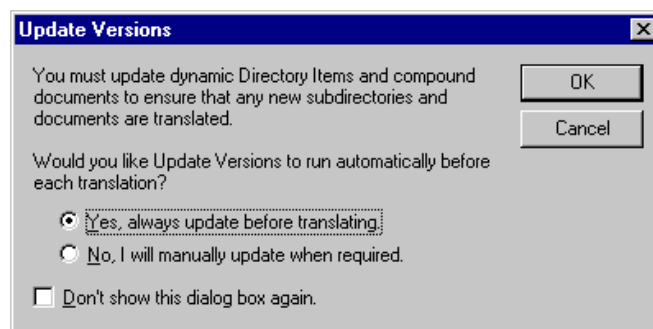


Figure 4-7 If at any time you select *Don't Show This Dialog Box Again*, you can always show the dialog box again by opening the *Applications Options* dialog box (from the *View* menu) and selecting the appropriate check box on the *Dialogs* tab.

By selecting **Yes, always update before translating** and also **Don't show this dialog box again**, you in effect automate the process of updating dynamic

Directory Items and compound documents when working in FileNet Document Publisher Station.

Using FileNet Document Publisher Server


When you schedule projects to run on Document Publisher Server, all source documents, Directory Items, and compound documents are automatically updated, because Document Publisher Server executes four commands—Update Versions, Translate, Stage and Publish—automatically. (See Chapter 3 for more information on how Document Publisher Server automates the staging and publishing of a project.)

Specifying a version of a source document

When you translate a project, FileNet Document Publisher uses the newest published version of each source document by default. You can specify another version, instead. In fact, Document Publisher Station offers three options for specifying which version of a source document to use:

- the newest published version (the default)
- a version specified in FileNet Content Manager or FileNet Content Services (requires a custom feature)
- a version specified in Document Publisher Station

To specify the newest published version in FileNet Document Publisher

1. With your project open in Document Publisher Station, right-click a source document in the Contents pane and choose **Properties** from the popup menu.
2. In the Document Properties dialog box, click the  button to open the Details dialog box (see Figure 4-8).
3. Be sure that the **Allow refresh to newest published version** option (the default setting) is selected.
4. Click **OK** to return to the Document Properties dialog box, and **OK** again to return to the main window.

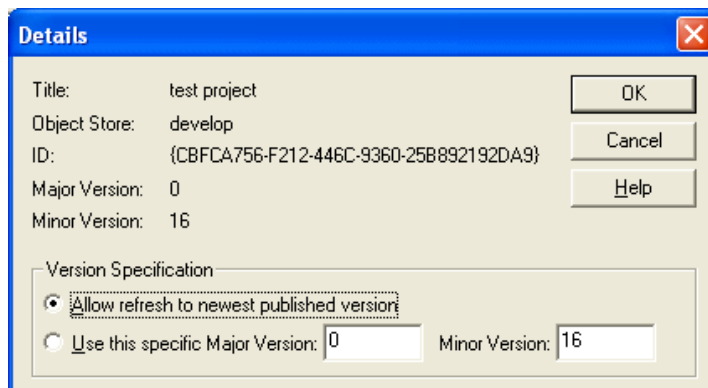


Figure 4-8 The Details dialog box in FileNet Document Publisher Station for a source document, showing the default setting, which will respect any custom feature you set in FileNet Content Manager or Content Services for the source document selected. However, the **Use this specific version** option will override any such custom feature.

With the default setting of **Allow refresh to newest published version**—and absent any custom properties in Content Manager or Content Services—each time you use Update Versions, Document Publisher Station identifies the latest version of a source document in the FileNet repository and retrieves a working copy of that version for translation. If you create custom properties for source documents in the FileNet repository and retain the default settings, the settings for the custom properties will prevail (see next).


To specify a version in the FileNet repository

You can increase your publishing options by adding the Publish Status custom property in Content Manager or Content Services. This option lets you toggle between the Draft and Publish status as you create and maintain source documents in a publication. See “Adding a version control feature” on page 55.

With this option, you must assign either the Draft or Publish status to a document each time you check it into FileNet Content Manager or Content Services. Whenever you click Update Versions, Document Publisher Station automatically checks for all versions of the document with the Publish status assigned to them and uses the latest one for translation.

Note: If you add an incomplete document to a publication for the first time, and initially use the Draft status to check the document into the FileNet repository, the document name will serve as a placeholder—the document will not be translated. When you check the final version into FileNet Content Manager or FileNet Content Services and assign the Publish status for the first time, the document will then become part of the updating process and be included in the next translation.

For FileNet Content Manager

1. Sign in to FileNet Workplace and browse to the source document.
2. Click  beside the document to open the **Properties** page.
3. Beside FWP Publish Status, choose **Publish**.
4. Click **Apply** to apply the settings and then choose **Exit**.
5. Sign out of FileNet Workplace and proceed to “To specify the newest published version in FileNet Document Publisher” on page 51.

For FileNet Content Services

1. In FileNet IDM Desktop, right-click the source document and choose **Properties** from the popup menu.
2. In the Document Properties dialog box, click the **Properties** tab.
3. Beside Publish Status, click **Publish**.
4. Click **OK** to close the Document Properties dialog box and proceed to “To specify the newest published version in FileNet Document Publisher” on page 51.

As long as you preserve the Publish status as you check the document into the FileNet repository, the Update Versions command will identify the latest published version of the document and use a working copy of that version for translation.

Draft status

You can use the Draft status to add a new document to a publication as a placeholder initially, as explained above. Once a document is part of a publication

and has been published at least once, you may want to continue to use the latest published version on your web site while you revise the document. The Draft status facilitates this, too.

To assign the Draft status to a document

1. Follow the steps outlined in “To specify the newest published version in FileNet Document Publisher” on page 51.
2. In the FileNet repository, follow the same steps to assign the Publish status (see “For FileNet Content Manager” on page 52 and “For FileNet Content Services” on page 52) and instead choose **Draft**.

Document Publisher Station will continue to translate and publish the latest published version of the document. But as long as you apply the Draft status to the document each time you check it into the FileNet repository, you can continue to revise the source document until you are ready to release the revised version for translation. To do that, simply change the document’s status to Publish.

To specify a version in Document Publisher Station

A third option is to specify a version in Document Publisher Station.


1. In the Contents pane, select the source document you do *not* want to be updated by the Update Versions command.
2. Right-click the document and choose **Properties** from the popup menu.
3. In the Document Properties dialog box, click the  button to open the Details dialog box (see Figure 4-9). By default, the **Allow refresh to newest published version** radio button is selected. The version number of the document currently selected for translation displays opposite Major Version or Minor Version. It also displays text boxes under Version Specification.



Figure 4-9 The Details dialog box, where you can specify a particular version of a source document in FileNet Content Manager to be used for your web publication. (For Content Services, the interface is slightly different.)

4. Under Version Specification, select **Use this specific version**.
If you are entering this dialog box for the first time for this document, the version number displayed in the text box will be the latest one available when you added the document to your publication.
5. In the text box, enter the version you want to use for all future translations of this document.

- Click **OK** to return to the Document Properties dialog box, and **OK** again to return to the main window.

Even where you use the Update Versions command to update the other source documents in your project, Document Publisher Station ignores any later versions of this document and also any custom feature that you have applied to the document in Content Manager or Content Services. It translates only the version specified.

Update status

The Contents pane can guide you generally as to whether source documents are out of date and your project needs to be updated and re-translated.

Where source documents from the file system have been added individually to a project, the Status column always tells you whether the latest version has been translated or not. A red cross in the Status column signifies that the source document has been updated since the last translation. An incremental translation would automatically recognize and translate this document.

However, with a Directory Item (dynamic or not), you will not know. This is because a Directory Item can contain many source documents, some of which may be up to date and others not. The same applies to source documents and Directory Items from FileNet Content Manager or FileNet Content Services. That is why the Update Versions command is so important.

Individual source documents from the repository that are subject to updating by the Update Versions command have an asterisk after their name. So if you specify a particular version of a source document, you will be able to tell from the Contents pane because that document will not have an asterisk after it.


Output	Source	Template	Status
Chapter 5.htm	\\FileNET\Tech Manual\Chapter 5*	Academy	⊗
Chapter 3.htm	\\FileNET\Tech Manual\Chapter 3	Academy	⊗
Other Issues.htm	C:\...\Samples\Styled\Other Issues.doc	Academy	⊗

Figure 4-10 The first two documents are from FileNet Content Manager or FileNet Content Services. The first (with an asterisk) is subject to updating with the Update Versions command. The second (without an asterisk) is not, because a version has been specified for translation.

Opening a project file from a FileNet repository


Once you check a new project file into FileNet Content Manager or FileNet Content Services, you can use it right away in Document Publisher Station. And you can open the file at any time from the FileNet repository for future sessions in Document Publisher Station.

To open a project file from FileNet Content Manager

- Click **Open**  on the toolbar.
- In the Select a Repository dialog box, choose **FileNet Content Manager** and click **OK**.
- In the Open a Project dialog box, browse to the folder (within an object store) where the project file resides.

4. Click **Select Current Version** beside the project file you want to open. Or, click **Select from Versions** and then select the desired project file from the list.
5. This returns you to FileNet Document Publisher Station, where you can start working on your project.

To open a project file from FileNet Content Services

1. Click **Open**  on the toolbar.
2. In the Select a Repository dialog box, choose **FileNet Content Services** and click **OK**.
3. In the Open a Project dialog box, browse to the folder (within a library) where the project file resides.
Or, enter a search criteria (Title, Doc Class, Doc ID, etc.) and click **Find Now** to locate the project file.
4. Select the project and click **Open**.
5. This returns you to FileNet Document Publisher Station, where you can start working on your project.

Note: If the project is currently checked out, you can open the project in the FileNet repository, right-click, choose **Cancel Checkout**, and then click **Yes** to keep the local copy of the project.

When you create a project file, Document Publisher Station automatically creates a companion history file, which it uses to track the date and time-stamp of each source document. (See “The history file” on page 37.)

When using FileNet Content Services, be sure to check out the project file, which is listed without its **.tcp** extension (unless you formally added the extension when you first saved the file). If you mistakenly try to check out the history file, which has a **.tch** extension, you will receive an error message. (In FileNet Content Manager you will not see the history file.)

Adding a version control feature

You can fine-tune your publishing options by adding the Publish Status custom feature to the FileNet repository. With this feature you can assign either a “Publish” or “Draft” status as you check each document into the FileNet repository using FileNet Document Publisher. (See “Assigning the Draft status to a source document” and “Assigning the Publish status to a source document” in the Help system.) As a result, you gain finer version control over the source documents you translate and publish.

To add a version control feature in FileNet Content Manager

- Use the Add Properties to Class Wizard in FileNet Workplace to create a new custom property for a class.
- Use the Create Property Template Wizard to create a template.
- Use the Properties Template Choice List Wizard to define a single-value choice list.

Adding a version control feature in FileNet Content Services

- Create and define a new custom property in IDMS Explorer, using “Publish Status” as the property name and selecting “Version” for the Parent Object. Do not make it a Multivalue setting.
- Add the property to the document class using the DocClass and CVL Administration dialog box.
- Define the CVL for the new custom property again, using the DocClass and CVL Administration dialog box. (The CVL should have the same name as the property and should have the data values Publish and Draft.)
- Define the document class by assigning the CVL to the new custom property and setting the property default as Draft.

Registry entries for existing properties/values

If you already have a suitable property/value in an existing Document Class, you can adapt the property and value for use in this custom feature by modifying the following Registry key:

Repository	Registry key
FileNet Content Manager	HKEY_LOCAL_MACHINE\Software\Stellent\Content Publisher\Repository\6.0\FileNet Content Manager
FileNet Content Services	HKEY_LOCAL_MACHINE\Software\Stellent\Content Publisher\Repository\6.0\FileNET

Add two string values: “PublishName” and “PublishValue.” Assign your property name to the PublishName and your trigger value to the PublishValue. (It may be necessary to create the “FileNET” Registry key if one does not exist.)

Note: If these keys are not detected, FileNet Document Publisher uses a default “PublishName=FDPPublishStatus” and “PublishValue=1” (for FileNet Content Manager) and “PublishName=PublishStatus” and “PublishValue=Publish” (for FileNet Content Services).

CHAPTER 5

The publishing process

The growing sophistication of web publishing demands an increasing commitment by enterprises. The goal is to not simply create a web site, but to also maintain that site through constant changes. The difficulty is to not simply handle the sheer quantity of information that an enterprise may seek to publish—often intimidating in itself—but to also meet the ever-pressing challenge of updating that information without disrupting the web site.

Key concepts and roles

Successful web publishing requires the efforts of a multi-skilled team working within a clearly defined process. For the purposes of this chapter, we will assume a project team consisting of:

- **content author**, who is responsible for content creation (possibly with one or more reviewers responsible for approving that content)
- **project author**, who is responsible for creating the publication hierarchy, fine-tuning templates, creating navigation links, etc., and for sending the web publication to the staging location for review
- **webmaster**, who is responsible for reviewing the web publication on the staging location and authorizing publishing—that is, placing the web publication on the web site (the publishing location)

These three roles represent distinct activities in the publishing process: content creation, project creation, and staging and publishing.

Note: In small organizations, a single person might assume all three roles. In large enterprises, there may be multiple content authors (and multiple reviewers). There may even be multiple project authors, with a lead author in charge of the master project and the others responsible for “linked publications.”

Stepping through the process

The publishing process consists of:

- Creating content in FileNet Content Manager or FileNet Content Services
- Creating a project in Document Publisher Station by adding the approved source documents to the project, creating the publication structure, setting navigation, and so forth
- Updating and translating the web publication you create (on a local or network drive) to test the look and feel of the publication
- Setting staging options and then actually staging (copying the translated output to the staging location)
- Reviewing the completed web publication in the staging location
- Setting publishing options and then actually publishing (copying all translated output to the publishing location—that is, to the web site)

The above can be done manually within Document Publisher Station. You can also use Document Publisher Server to automate the process, including both the staging and publishing of output, as we will see later.

Creating a project

Chapter 4 outlined the basics of handling project files in Document Publisher Server. There are additional tasks you need to consider to take advantage of the publishing process. You may want to:

- Add a linked publication to a project
- Set staging options
- Set publishing options
- Use Document Publisher Server to automate both staging and publishing

In this section, we will look at linked publications. Later sections will address staging and publishing options, as well as automating the staging and publishing of your project.

Adding a linked publication to a project

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

However, to change a linked publication, you must open the linked publication by itself in Document Publisher Station. And the next time you open the master project, you must be sure to use Update Versions before translating so that the changes made to the linked publication are reflected in the translation of the master project.

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

To add a linked publication

1. With your project open in Document Publisher Station, select the subpublication in the publication hierarchy that will contain the linked publication.
2. Click **Publication** on the Add menu to open the Add Publication dialog box.
3. Click the **Add Linked...** button, and in the Open dialog box locate the project file for the project you want to add as a linked publication.
4. Select the project file and click **OK** to return to the Add Publication dialog box.

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

5. Click **OK**.

You have now added a linked publication, which appears as a subpublication of the publication originally selected. Both the linked publication (in the Publication Hierarchy pane) and its contents (as displayed in the Contents pane) are grayed out to signify that you cannot edit a linked publication while it is part of a master project. The linked publication must be maintained separately, and opened by itself in Document Publisher Station to be updated.

Note: You can convert a linked publication into a regular publication at any time. Right-click the linked publication in the Publication Hierarchy pane and choose **Make embedded** from the popup menu. Click **Yes** in the dialog box that appears. The publication is now a permanent part of the master project and its contents can be edited like those of any other subpublication. (The project file for the linked publication still exists in its original location and can be used for other purposes, if you want.)

Updating source documents

Once you have completed project setup and have your publication hierarchy in place, you can begin testing template settings, navigation, and so forth. During this phase of the publishing process you are translating the project to a local or network drive and are therefore involved with the three-step sequence of *Update-Translate-View*.

Once you are satisfied with the structure and formatting of your publication, you are ready to stage your output, that is, have Document Publisher Station copy your translated output from the file system to a staging location so that you can formally review your web pages before publishing the content to a web site. Later still, you will finally publish to the web site. So the complete sequence is *Update-Translate-View-Stage-Publish*.

You will want to use the Update Versions command as you create your project. You will not necessarily want to use the command before each translation, but you will certainly want to use it at critical times during project creation to be sure that what you are reviewing contains the latest content. This obviously becomes more important during staging, and more important still before you finally publish.

The Update Versions command is important because when you add source documents to a publication, you do not, in fact, check out those documents from FileNet Content Manager or FileNet Content Services. Rather, Document Publisher Station obtains working copies of the versions current at the time the documents were added to the project and uses those copies for translation. As a result, someone else may check out—and change—those same files by the time you are ready to stage and publish.

Update Versions command

When you click Update Versions, Document Publisher Station reviews the status of all source documents in the FileNet repository and identifies any that have been checked out and revised since you first added them to your publication. It uses copies of the latest released versions of those documents for all subsequent translations (until you click Update Versions again).

Clicking Update Versions on the toolbar updates *all* documents in your publication, no matter what is selected in the Publication Hierarchy or Contents pane. Alternatively, you can update all documents by selecting the root publication, right-clicking, and choosing Update Versions from the popup menu that appears.

Likewise, to update selectively, select only the appropriate subpublication in the Publication Hierarchy pane or the Directory Item or document in the Contents pane. Then right-click and choose Update Versions from the popup menu. In that event, Document Publisher Station will check for new versions of only those source documents included in your selection. (You can select multiple documents by using the Ctrl key with the mouse button.)

Note: You can also translate selectively. You can right-click a publication in the Publication Hierarchy pane and click Translate Publication on the popup menu. Alternatively, you can select source documents from a particular publication in the Contents pane, right-click, and choose Translate Selected from the popup menu.

Updating a linked publication

A linked publication cannot be changed from within a master project. It must be opened separately, by itself, in Document Publisher Station, and the Update Versions command used to update the contents of the project. Once a linked publication is updated, you must use the Update Versions command the next time you open the master project in order for changes to the linked publication to be reflected in the master project.

Updating projects on FileNet Document Publisher Server

Updating occurs automatically when you schedule a project for translation on FileNet Document Publisher Server. For more information, see “Publishing in FileNet Document Publisher Server” on page 23.

Staging a project

Staging a project is the process whereby Document Publisher Station copies translated output from the file system to a staging area for the webmaster to review before the finally approved content is published to the web site (the publishing location).

You can, in fact, by-pass staging and go straight to publishing. But a review is advisable if only because there likely will be some features of your web site that you can check only once you have staged (or published) your project. For example, staging provides an opportunity to inherit document information from source documents and place it in your output web pages. It also would allow certain scripting behaviors to run on the web server (such as a dynamic include).

Setting staging options

You must set staging options in order to stage your project. The staging options you set apply only to staged output. Once you have reviewed your staged web publication and are ready to publish, you must set publishing options for your published output. (Although you set the options separately, you should generally set them the same way.)

- If, for a particular project, you set *only* staging options or *only* publishing options, any property values and security settings you choose to inherit will be inherited directly from the source documents.

- If you set *both* staging *and* publishing options, the values and settings you inherit for published output will come from your staged output (which will have obtained them from the source documents).
- If, however, you set both staging and publishing options but only publish—do not first stage—your project, then your output pages will not be able to inherit property values and security settings. Document Publisher Station (or Document Publisher Server) will try to inherit them from the staged output. It will fail to do so and will generate a publishing error.

Staging to a FileNet repository

The Publish command is the final command you will use during a typical session in Document Publisher Station. In reality, the final sequence is the five-part *Update–Translate–View–Stage–Publish*. Once you have completed your final translation, you use the Stage command to copy all output files from your file system into an object store in FileNet Content Manager or a library in FileNet Content Services. Once you have reviewed the publication and are satisfied with it, you are ready to publish; that is, copy the translated output to a different object store in FileNet Content Manager or a library in FileNet Content Services (or go directly to a web server). In the process, Document Publisher Station fixes up all URLs with document IDs.

Before you stage or publish, you must first use Staging or Publishing Options to

- Designate locations for the staged or published output
- Apply property values to the staged or published output
- Apply security settings to the staged or published output
- Specify a URL format for fixing up document IDs

Let us first consider a simple situation in which you designate output locations, inherit both property values and security settings, and specify a URL format. Later, we will review additional options for applying property values and security settings, and also for fine-tuning their use within a project.

Note: For more on property values and security settings themselves, see related FileNet documentation.

In the following examples, we will look at what happens when you set staging options. You follow essentially the same steps to set publishing options.

To designate output locations

1. Click **Staging Options** on the Run menu to open the Staging/Publishing Options dialog box (see Figure 5-1).
2. From the Repository drop-down list, select **FileNet Content Manager** or **FileNet Content Services**.

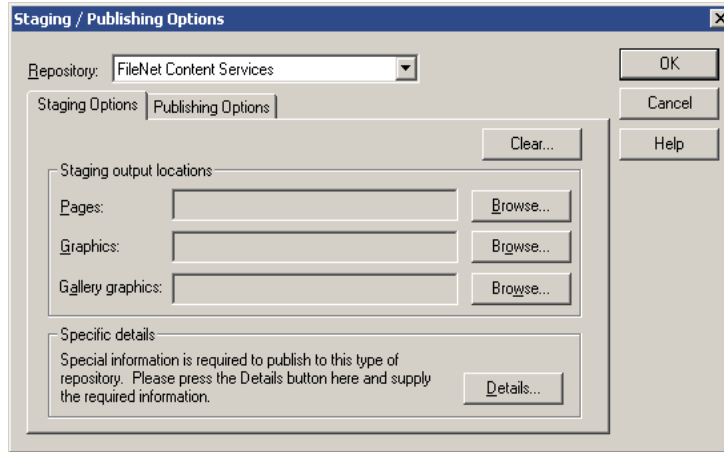


Figure 5-1 The Staging Options dialog box before libraries and folders have been specified for staged output in FileNet Content Services.

3. Opposite the Pages field, click **Browse** to open the Output Document Location dialog box (see Figure 5-2).

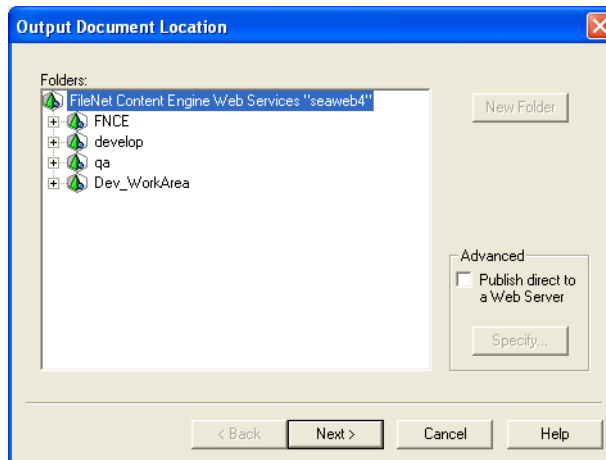


Figure 5-2 The Output Document Location dialog box in Content Manager, where you select a folder for staged output. (The interface is different for Content Services.)

4. Select the appropriate folder in the FileNet repository for the staged output pages.

The Advanced panel is relevant only if you are publishing some or all of your output directly to a web server. (See “Outputting directly to a web server” on page 74.)

5. Click the **Next** button to open the Output Document Properties dialog box (see Figure 5-3).

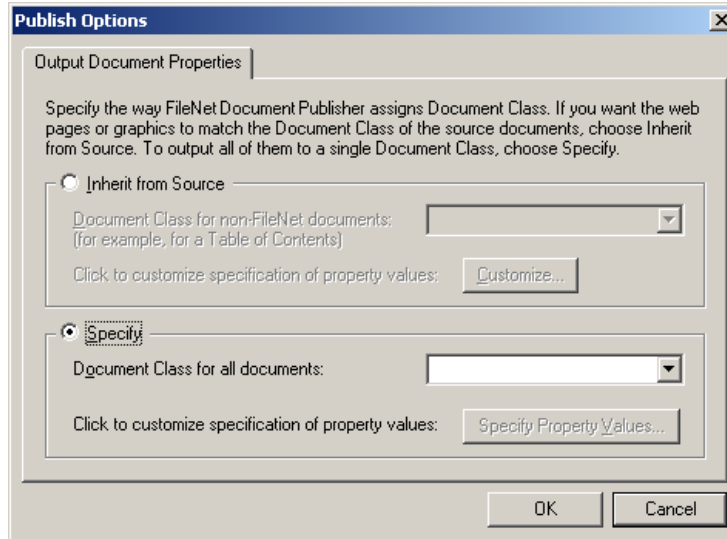


Figure 5-3 In the *Output Document Properties* dialog box, you decide whether to inherit (and possibly customize) property values for published output or to specify them, instead.

6. Click **Inherit from Source**.

With this setting you have decided to inherit property values from the source documents and apply them to output pages and graphics. You could still customize some of these values, if you want to. We will look at that option later.

7. From the Document Class drop-down list, select the document class you want to assign to non-FileNet documents.

Since framesets, TOCs, and other reference pages are generated by FileNet Document Publisher Station, they have no property values to inherit. So you must assign a document class to such output in order to apply property values. The class will apply also to any associated files in the project.

Note: The object store in Content Manager or library in Content Services that you are publishing to determines the document classes available from the drop-down list.

8. Click **Next**. The *Output Document Security* dialog box opens, where you specify security settings (see Figure 5-4).

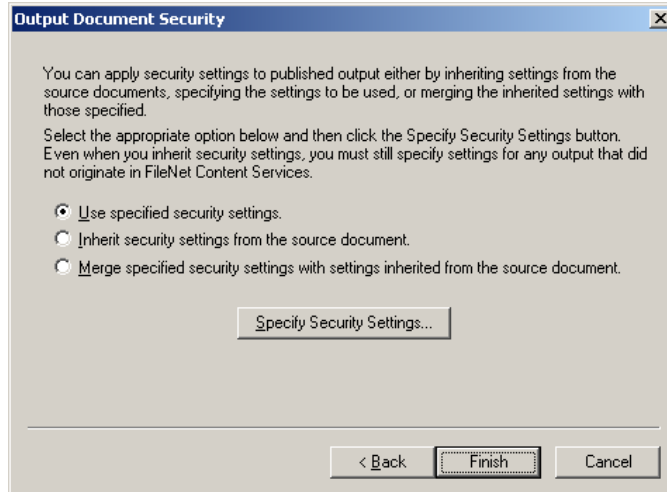


Figure 5-4 The Output Document Security dialog box, with options for inheriting or specifying security settings, or doing both.

9. Click **Inherit security settings from the source document**, and then click **Finish**. (This is the simplest choice. We will examine the other options below.)

Document Publisher Station returns you to the Staging Options dialog box, as shown in Figure 5-5.

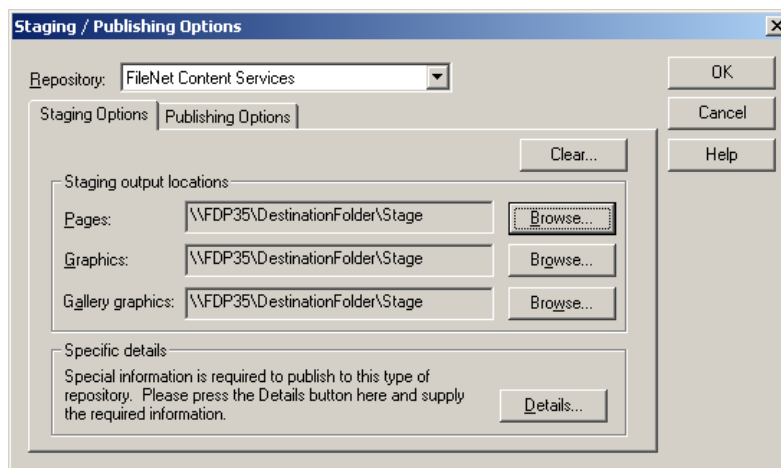


Figure 5-5 The Staging Options dialog box, once you have designated locations for staged output.

Using different output locations for graphics

When you set publish options for pages, the designated output location is used automatically for graphics and Gallery graphics, too. (See the Staging Options dialog box in Figure 5-5.)

You can choose a different folder (and library) for output graphics, if you want, and also for gallery Graphics. If you do so, you can also apply different property values and security settings for graphics and Gallery graphics.

To change the output location for graphics or Gallery graphics, click the appropriate Browse button in the Publish Options dialog box and repeat the steps above to designate output locations.

To specify a URL format

Once you designate output locations and specify property values and security settings, you are not quite done. When Document Publisher Station checks published output into FileNet Content Manager or FileNet Content Services, it assigns an ID to each file. That is, it replaces all URLs for the output files with IDs, so that all links between your documents are preserved once you publish to the web site.

You must specify a particular URL format to fix up the links, depending on where you publish to.

1. Click **Details** in the Publish Options dialog box to open the Publish Details dialog box (Figure 5-6).
2. From the Relative and Absolute drop-down lists, select the URL format most appropriate to your needs (see “Selecting a URL format” on page 65).

Note: If you publish all output to FileNet Content Manager or FileNet Content Services, the default relative URL format is fine and you do not need to enter the Publish Details dialog box.

3. Click **OK** to return to the Publish Options dialog box. Click **OK** again to complete publish options and return to the main window.

You are now ready to publish.

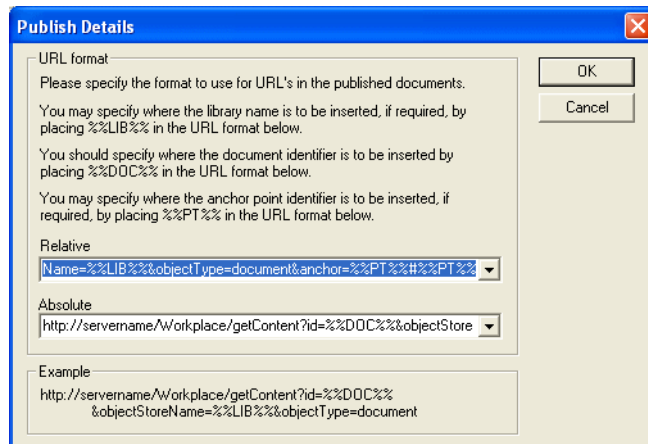


Figure 5-6 Publish Details, where you specify the appropriate URL format so that your web server can retrieve the output files from the repository.

Selecting a URL format

When specifying publish options for a project, you must specify a URL format (see “To specify a URL format” on page 65).

When Document Publisher Station checks published output into a FileNet repository, it assigns a document ID to each file. That is, it replaces all URLs for the output files with document IDs, so that all links between your documents are preserved once you publish to your Web site.

You must specify a particular URL format to fix up the links, depending on where you publish to. By selecting the appropriate URL format, you will ensure that the individual pages and graphics of your published output remain linked at all times, no matter where they are accessed from.

General rules

- You will almost always need to specify a relative URL (but the default setting should be fine in most cases).
- You will rarely need to specify an absolute URL.
- FileNet will use only the information needed, based on your publishing needs. (For example, when your publishing situation is as outlined in Example 3, below, it only matters what displays in the Absolute text box.)
- In some instances, you will need to identify a Web server URL, too (see the examples below).

Possible scenarios

Following are four examples of the situation you may be in when selecting a URL format to complete the setting of publish options for your project before publishing.

Example 1 — In the most common situation, you are publishing all your output to a FileNet repository and therefore all links between output pages and graphics take place in the same repository (possibly in different object stores or libraries). By selecting the following relative format, all links between the files will be preserved and FileNet will be able to access them.

FileNet Content Manager	<code>getContent?id=%DOC%&objectStoreName=%LIB%&objectType=document&anchor=%PT%#%PT%</code>
FileNet Content Services	<code>doccontent.dll?library=%LIB%&id=%DOC%&anchor=%PT%#%PT%</code>

Note: You may not require the full URL shown, but it will take care of all possibilities.

Example 2 — In this instance, you are publishing some of your output to the FileNet repository and some directly to a Web server; also, the files published to the server contain no links back to the repository. (A good example would be Gallery graphics, which you might want to place on a fast, unsecured server). Again, you would use the following relative format.

FileNet Content Manager	<code>getContent?id=%DOC%&objectStoreName=%LIB%&objectType=document&anchor=%PT%#%PT%</code>
FileNet Content Services	<code>doccontent.dll?library=%LIB%&id=%DOC%&anchor=%PT%#%PT%</code>

This time, however, you would also need to provide a Web server URL (a full path for the root of the published output) in the Web Server Location dialog box when you specify a file system location for the output published to the server.

Example 3 — Say you are again publishing some of your output directly to a Web server, but this time the files contain references to files in the repository. (You might have placed associated files in the same output folder as your Gallery graphics.) In that event, you need to specify a server address so that FileNet can retrieve files from the repository. In other words, you would need to provide an absolute format:

FileNet Content Manager	<code>http://servername/Workplace/getContent?id=%DOC%&objectStoreName=%LIB%&objectType=document&anchor=%PT%#%PT%</code>
FileNet Content Services	<code>http://YourServerName/idmws/doccontent.dll?library=%LIB%&id=%DOC%</code>

You will need to edit the “servername” and “YourServerName” portion of the default URL. In addition to providing this absolute URL format, you will also need to provide both a physical location on the file system for the files published to the server and a Web URL address.

Example 4 — In the unusual case where you publish all your output directly to a Web server, you will need neither a relative nor an absolute URL. In effect, the Publish details dialog box can be ignored. (All the links are relative and no document IDs are being created in the FileNet repository.) And when you identify a file system location for the published output, you won’t need to provide a Web server URL, either.

Note: Any additional URL formats you enter in the Publish Details dialog box will be preserved by Document Publisher Station and will be available when you enter the dialog box in the future.

Confirming staging options

Once you have specified locations for your output files, and also property values and security settings, and have selected a URL format, you have completed publish options for your project. Each time you click Stage on the Run menu, the Confirm Staging Options dialog box will open, so that you can confirm your options (see Figure 5-7).

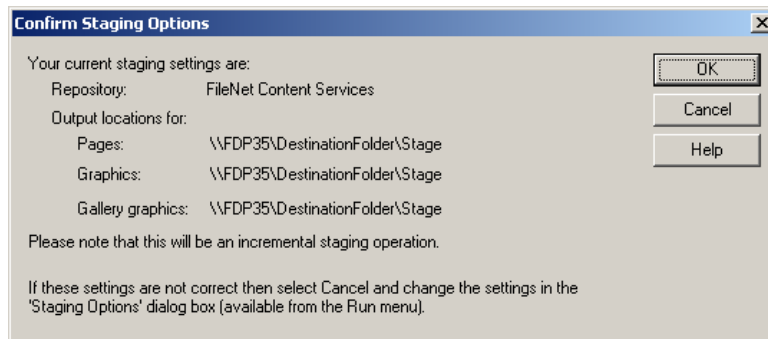
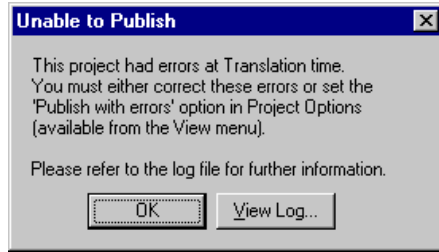


Figure 5-7 The Confirm Staging Options dialog box, containing information specified in the Staging Options dialog box.

To accept the information, click **OK**. Document Publisher Station will stage to the specified library in FileNet Content Manager or Content Services or directly to a web server, as specified. To change any information, click **Cancel** and return to the Staging Options dialog box. (If, when you click Stage, you have not already specified the required information, the Staging Options dialog box will open instead.)

If Document Publisher Station encountered problems during translation, the Unable to Publish dialog box will open when you click **OK**:



If this happens, you must either correct the errors that occurred during translation (you can click **View Log** to identify the errors in the log file) or select the **Publish with errors** option in the Project Options dialog box (from the View menu).

Notes

- Document Publisher Station stages and publishes incrementally. Say you have already staged and decide to update source documents and therefore the translated output. When you retranslate and click **Stage**, Document Publisher Station will copy only the revised output files from the file system to the library designated for staged output. It will preserve the original IDs in the process.
- If you change property values or security settings, simply click **Stage** for these to take effect.
- If, however, you change the output locations, Document Publisher Station will delete all published output from the old locations and create new files with new IDs in the new locations.
- The Update Versions, Translate, Stage and Publish commands work differently when you schedule a publication for translation by Document Publisher Server. (See Chapter 3.)

Specifying properties and security for published output

Above, we explored a simple example of setting publish options for a project. We applied to the published output the property values and security settings inherited from the source documents. However, when you set publish options, you can

- Customize the inherited property values
- Specify, instead of inherit, property values
- Specify, instead of inherit, security settings
- Merge specified security settings with inherited ones

Finally, you can fine-tune property values and security settings at the publication, Directory Item, or document level in your project. Let us look at each, in turn.

Notes

- When you inherit property values or security settings, ideally you should stage and publish to the library that contains the source documents. If you stage and publish to a different object store or library from the source, the object store or library you publish to should share those document classes.
- You might also consider creating a special document class (say “Web Publishing”) for all output files. This document class should have no required fields. In this way you will not disrupt the publishing process in FileNet Document Publisher.

To customize inherited property values

Instead of applying all inherited property values to your staged or published output, you might want to customize some of those values.

1. In the Output Document Properties dialog box (see Figure 5-3), select **Inherit from Source**.
2. From the drop-down list, select the document class you want to associate with non-FileNet documents. (Remember: FileNet Document Publisher Station makes framesets, TOCs, and other reference pages during translation, so those files cannot inherit property values. This applies to associated files, too.)
3. Click the **Customize** button to open the Customize Document Properties dialog box (see Figure 5-8).

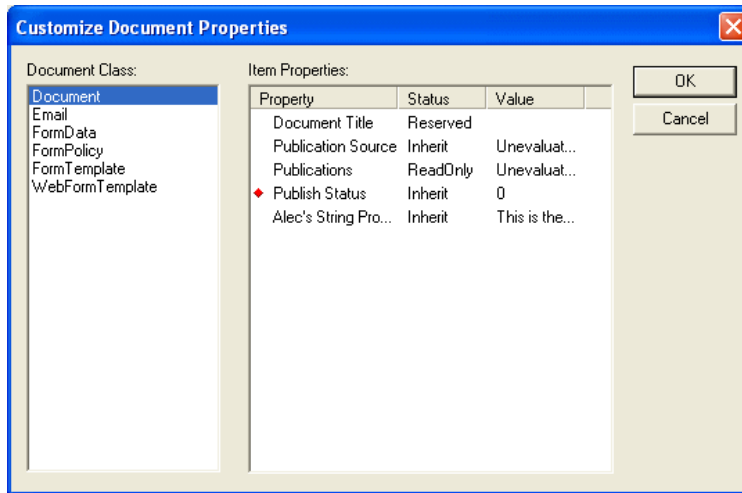


Figure 5-8 The Customize Document Properties dialog box lets you switch between the document classes used for your source documents and to customize each class, in turn. The above dialog box is for Content Manager. The dialog box is different in Content Services.

4. Under Document Class, select the class you want to edit.

Note: The classes listed are those available in the object store or library you are publishing to. If you publish to one different from your source, it should be to an object store or library that has the same document classes.
5. Under Item Properties or Version Properties you can only customize those entries with the status Inherit or Set. You can right-click to toggle between the two options.

Example: You may have a Comment property (not shown in Figure 5-8). You could right-click **Inherit** opposite the property in the Item Properties box and choose **Set** from the popup menu if you want to create an alternative comment to the one being inherited. Then, in the text box that appears, you could type the alternative comment to be used. If you wanted to suppress the original comment and not replace it with a new one, you could simply leave the text box empty.

Example: In the Version Properties box, you have the option of right-clicking **Inherit** opposite Publish Status. If you change **Inherit** to **Set**, you could then select Publish instead of Draft from the drop-down list that appears immediately in the Value column.
6. Click **OK** to return to the Output Document Properties dialog box.

- Click **Next** to open the Output Document Security dialog box (see Figure 5-4) to finish setting publish options.

Note: Reserved means that FileNet Document Publisher will set these values as part of the publish process, while **ReadOnly** represents properties that cannot be set explicitly.

To specify property values

In the above example you inherited property values from your source documents and then customized some of those properties.

Since your documents could have different document classes, they conceivably could have a variety of property values. If you prefer to impose a single document class (and therefore a single set of property values) on all published output, you can do that, instead. Let us return to the Output Document Properties dialog box (Figure 5-3)

- Select **Specify**.
- From the Document Class drop-down list, select the Document Class you want to use for all published output.
- Click the **Specify Property Values** button to open that dialog box (Figure 5-9).

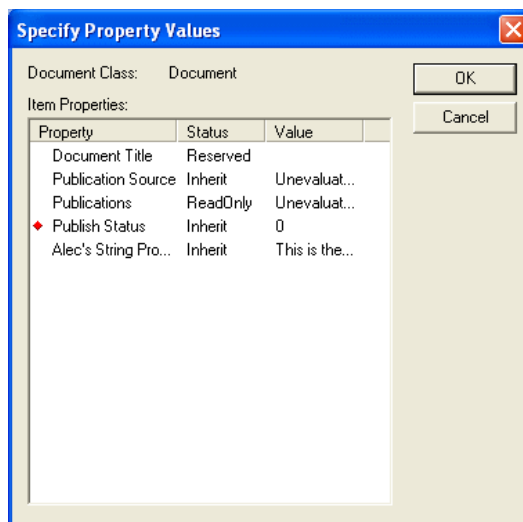


Figure 5-9 The Specify Property Values dialog box is similar to the Customize Document Properties dialog box, except that you are editing a single document class. The above dialog box is for Content Manager. The equivalent dialog box in Content Services is slightly different.

This dialog box is very similar to the Customize Document properties dialog box (Figure 5-8). Since you use a single document class when you specify property values, there is no need for a Document Class list.

Once again you can specify only properties with the Inherit status (toggling to Set, if you want to, and then specifying a value).

Note: In this example, since Draft is the default value for the Publish Status property, it will be applied automatically to all non-FileNet output.

- Specify those property values you want to for the document class selected for all published output.

- Click **OK** to return to the Output Document Properties dialog box. Then click **Next** to open the Output Document Security dialog box to complete security settings there.

Note: While you customize (or specify) property values, you can still inherit security settings (as explained above). Alternatively, you may choose to specify or merge them, as explained next.

To specify security settings

In our simple example (above), we originally inherited security settings. In that event, all security settings in the source documents would automatically apply to the published output. Let us review what these three options in the Output Document Security dialog box (see Figure 5-10) actually mean.

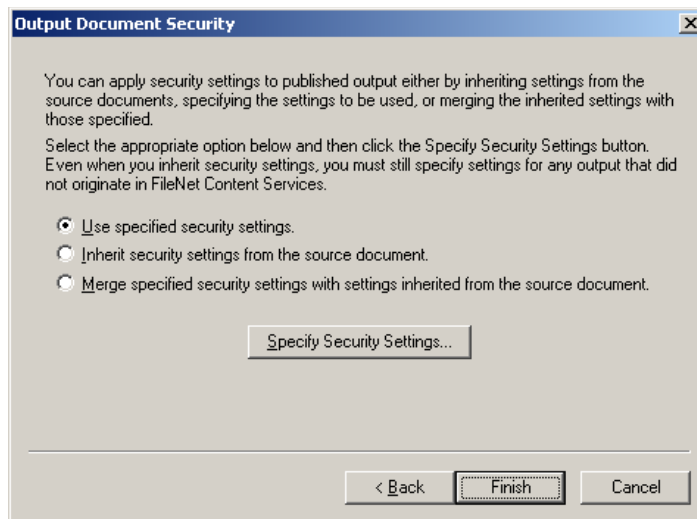


Figure 5-10 The three options in the Output Document Security dialog box allow for either inheriting security settings or specifying new ones—or doing both.

- **Use specified security settings** — Security settings in the Security tab dialog of the Output Document Properties dialog box apply to all output files. (This is the default setting.)
- **Inherit security settings from the source document** — Security settings for the individual source documents are used. If the security settings for a particular source document cannot be determined, settings in Output Document Properties dialog box will be used.
- **Merge specified security settings with settings inherited from the source document** — Merges security settings from the source document with those set in Output Document Properties dialog for the output files. So if Jack is the Owner of the source documents and Jill is the Owner of the output files, merging the security settings would result in both Jack and Jill having access to the output files. And this will happen even if Jill is a Viewer of the source documents, because specified values take precedence over inherited ones.

Note: In most instances, you will want to either specify or merge security settings. If the webmaster responsible for the published output simply inherits security settings, and the source documents have a Read Only setting, the webmaster may not have access to the published output if he does not have administrative privileges.

1. To specify security settings, with **Use specified security settings** selected, click the **Specify Security Settings** button to open the Output Document Properties dialog box (see Figure 5-11).

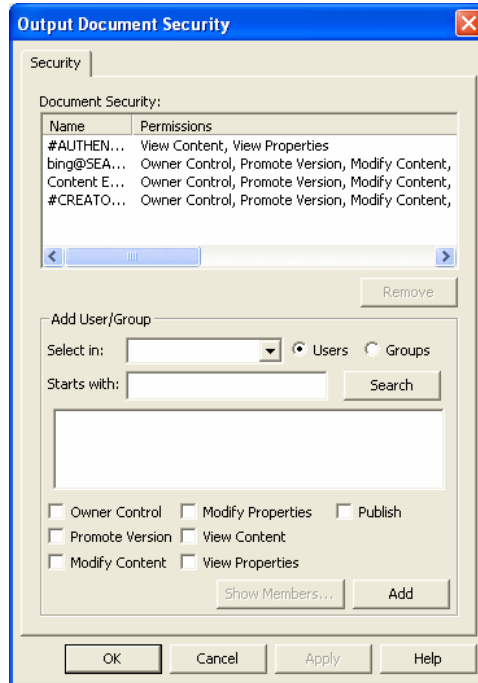


Figure 5-11 The Security tab dialog for Content Manager, where you specify security settings. Content Services offers similar properties.

2. Set the security for all output pages. (See your Content Manager or Content Services documentation for more information on security settings.)
3. Click **OK** to return to the Output Document Security dialog box.
4. Click **Finish**. Document Publisher Station captures the information and returns you to the Staging Options dialog box (see Figure 5-5). The selected folder now displays in the Pages text box, and also in the graphics and Gallery graphics text boxes.

To merge security settings with inherited settings

A final option is to both inherit security settings and specify new ones—and merge both.

1. Select **Merge specified security settings...** and then click the **Specify Security Settings** button to open the Output Document Properties dialog box (see Figure 5-11).

As you can see, you use the same dialog box to merge settings as to specify them. The difference is that this time the specified settings will be merged with the ones inherited, instead of replacing them.

2. Specify security settings and then click **OK**.
3. Click **Finish**.

To fine-tune property values and security settings

When you complete publish options for a project, you are treating all of your publication the same way for the output location selected. That is, the same

property values and security settings (whether inherited or specified) will be applied to all output pages and graphics for a given output location.

That may be fine for most purposes. If you prefer, and as noted above, you can select a different output location for graphics and/or Gallery graphics and set property values and security settings unique to those output files.

Yet another option is to fine-tune your publication by specifying different options for individual subpublications, Directory Items, or documents in your project. This is only possible when you have completed staging or publishing options.

Let us take a simple example of changing the settings for a single document.

1. Right-click a source document in the Contents pane and choose **Properties** from the popup menu. The Document Properties dialog box opens.

The dialog box now has a Publish Options tab. This tab displays only if you have already specified output locations, etc., in the Staging or Publishing Options dialog box.

2. Click **Publish Options** to open that tab dialog. (See Figure 5-12.)

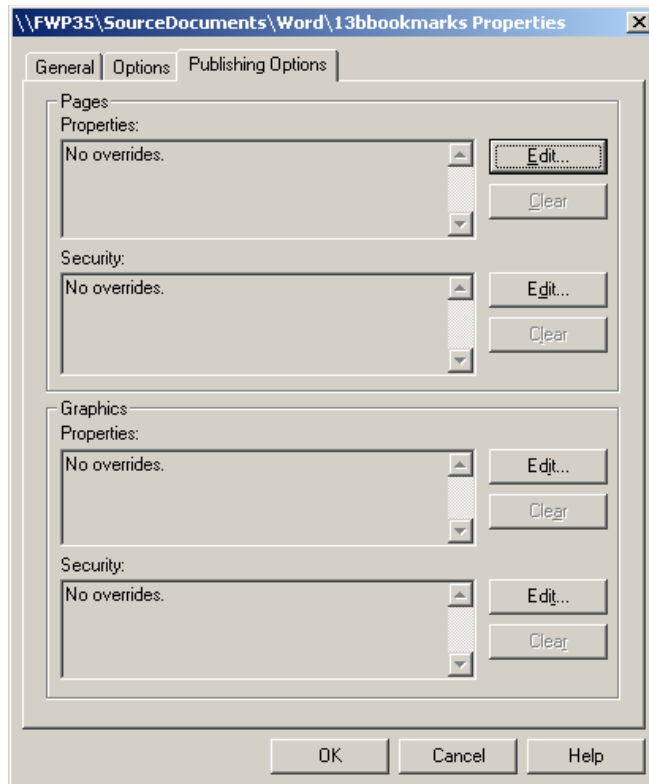


Figure 5-12 The Publish Options tab dialog, which is available for subpublications, Directory Items, and individual source documents once you have set publish options for the project.

You have two basic sets of options: pages and graphics. And within each, you have the opportunity to edit property values and security settings that will override those set for the project as a whole in Publish Options. (In each case, the Clear button will simply clear whatever override property values or security settings have been entered. In that event, the values and settings will revert to whatever is set at the next highest level in the hierarchy.)

The **No overrides** entries signify that no property values or security settings have been specified for this source document (or Directory Item or subpublication, as the case may be).

- Under Pages, click the **Edit** button opposite Properties to open the Output Document Properties dialog box.

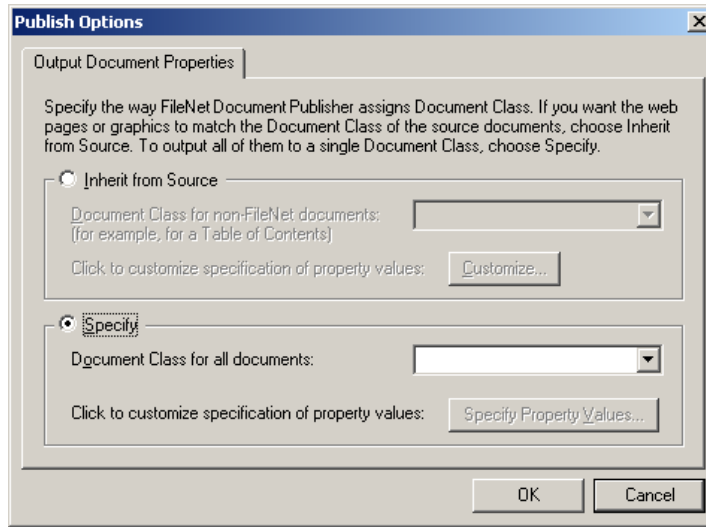


Figure 5-13 This is the same dialog box you saw when you first set staging and publishing options. Now, you can set property values for the selected document (or subpublication or Directory Item) and these will override those values set for the project as a whole.

Notes

- Once staging options have been set in the Staging Options dialog box, the Publishing Options tab shown in Figure 5-12 is now available for Directory Items and any subpublications, too, so you can fine-tune property values and security settings for those in the same way. (This is also true, of course, when you set publishing options in the Publishing Options dialog box.)
- When you set publish override options in a subpublication, Directory Item, or individual source document, these options override options that have been set at a higher level in the hierarchy. Typically, this will mean that they override staging or publishing options set for the project as a whole. Conceivably, however, you could set options for a subpublication that are different from the project options, and then set options differently for a source document within that subpublication.
- Although the Publish Options tab is available for the root publication (as well as all subpublications, Directory Items, and source documents), you should ignore it. You must always use the Publish Options dialog box to set publish options for the project as a whole.
- Gallery graphics are dealt with only at the project level. Property values and security settings will be determined by your choice of output location in Publish Options and the document class you select when designating that location.

Outputting directly to a web server

Above, we addressed publish options in the context of placing published output in FileNet Content Manager or FileNet Content Services. If you prefer, you can publish some or all of your output directly to a web server, instead. For example, you might want to place Gallery graphics on a fast, non-secure server.

1. In the Output Document Location dialog box (see Figure 5-14), select the check box under **Advanced** and click the **Specify** button.

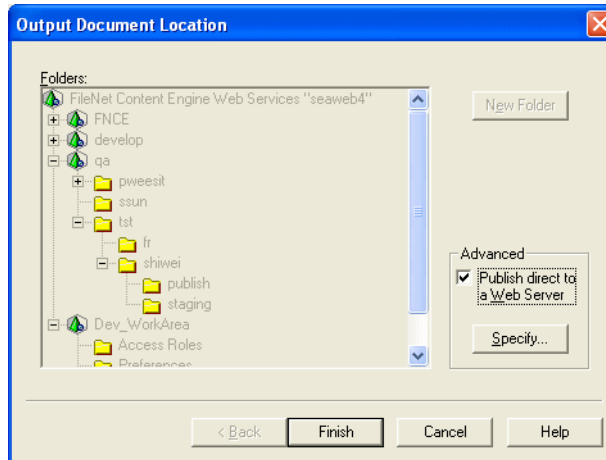


Figure 5-14 Check the Publish Direct to a Web Server check box in the Advanced panel to send published output directly to a Web server.

The Web Server Location dialog box (Figure 5-15) opens.



Figure 5-15 When publishing directly to a web server, you need to designate an output location for the output pages and graphics. You may also need to provide a web server URL as a means to access those pages and graphics.

2. In the Directory text box, enter the path for the shared network directory you want to use for your published output. Use a UNC path (as shown in Figure 5-15), rather than a DOS path.

If you are not sure of the location, click the **Browse** button to open the Select Directory dialog box, and then locate the shared drive and directory. (The UNC path of the selected directory will display in the Web Server Location dialog box if you start your search from Network Neighborhood.)

3. Click **OK** to return to the Web Server Location dialog box.
4. In the Web URL text box, enter the full path for the Web URL that will allow the published output to be retrieved by FileNet IDM Web.
5. Click **OK**.

Notes

- You may not always need to provide a web server URL. See “Selecting a URL format” on page 65 for more information.
- When you publish output directly to a web sever, any property values and security settings associated with the source documents is discarded.

Publishing a project

Publishing a project is similar to staging one. In fact, you could, if you like, ‘stage’ directly to your web site. (However, you should not ‘stage’ to a publishing area if you have already staged to a staging area. See Note 1, below.)

So setting publishing options is very similar to setting staging options (you work through the same set of dialog boxes). But remember: If you set both staging and publishing options but only publish—and do not first stage—your project, then your output pages will not be able to inherit security settings. Document Publisher Station will try to inherit them from the staged output. It will fail to do so and will generate a publishing error.

When you use the Publish command, Document Publisher Station places a copy of the translated output (which always resides on the file system) to the object store in FileNet Content Manager or library in FileNet Content Services designated for publishing. You should not be updating between staging and publishing, because if something has changed, you will probably want to translate your web publication one more time, and also stage it again, before you publish.

Notes

- Document Publisher Station stages and publishes incrementally. Say you have already staged or published and decide to update source documents and therefore the translated output. When you re-translate your project and then stage or publish again, Document Publisher Station will copy only the revised output files to the location designated for staged or published output.
- The Update Versions, Translate, Stage, and Publish commands work differently when you schedule a publication for translation by Document Publisher Server. For more information, see “Publishing in FileNet Document Publisher Server” on page 23.

Automating staging and publishing

You can use Document Publisher Scheduler to automate the staging and publishing of your web publication by scheduling your project to run on Document Publisher Server.

If you want to both stage and publish the same project, you will want to leave some time between the staging of the project phases in order to allow time for the webmaster to review output in the staging area.

As explained in Chapter 3, you can achieve this by setting up two tasks for the same project.

CHAPTER 6

Setting project and application options

During project setup you may set options that can affect your output in a number of ways. You can always accept the default settings—they will be fine in most instances. And whatever options you set at any time, you can later change at any time. But you should be aware of the options available in FileNet Document Publisher.

FileNet Document Publisher distinguishes between two types of options, as represented by two dialog boxes: Project Options and Application Options.

- “Project options” are saved with the project file. Changes apply only to the project open in Document Publisher Station at the time of the change.
- “Application options” are user-specific for a given machine. If multiple users share a machine and set different options, the options in effect will be those that have been set by the user who is currently logged on.

Project options

To review project options, click Project Options on the View menu to open the Project Options dialog box (see Figure 6-1).

Some of the default settings for project options are shown in the figure. If you change any settings, the new settings will be saved to the project file and will apply to the current project only. On the General tab dialog, you can set the following options:

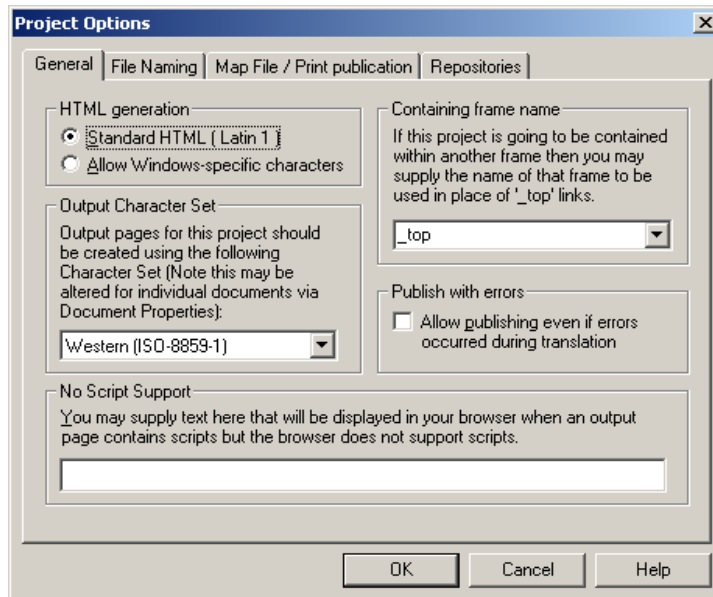


Figure 6-1 The Project Options dialog box, with the General tab dialog open. Here, you set options that are saved with the project file. That is, the settings move with the project and will apply, for example, if you schedule the project for translation by FileNet Document Publisher Server.

HTML generation — Standard HTML (Latin-1) is supported by HTML. The optional Windows-specific character set offers a richer set of characters, but is advisable only if you know your users can display all the characters in their browser. (This option is not appropriate, for example, with Unix-based browsers.) These options should be used in conjunction with Output Character Set.

Output Character Set — The default set is Western (ISO-8859-1). Unicode (UTF-8), which is supported by HTML 4.0, offers the broadest range of characters for all browsers, except older ones (version 2.0 and earlier). It includes all the characters offered by the other options.

Containing frame name — Used when your FileNet web publication will become part of an existing web publication. In that event, you should replace **_top** with the name of the frame your web publication will open in (otherwise, your FileNet publication will take over the whole browser window). All names used will be saved to the project file and will be available from the drop-down list in future.

Publish with errors — Used to publish with errors even when FileNet Document Publisher encounters problems during translation. The option is turned off by default. The option is designed especially for situations where a file in an unsupported format inadvertently has been added to a Directory Item. With this check box selected, FileNet Document Publisher will simply skip this file and complete the translation and publishing process as if the file was not in the Directory Item at all. (Its failure to translate the file will be noted in the Log file.)

No Script Support — Used to add text to display in the user's browser when an output page contains scripts and the browser does not support them.

Note: This option is not generally required, because web publications built with FileNet Document Publisher will still function when scripting is turned off. The only time you might want to use this feature is when you have created a web publication that includes the Print button and you are not certain that all users will be able to use this functionality successfully.

On the File Naming tab dialog, you have the following options:

File names — An important setting where case sensitivity is an issue. Typically not an issue in a Windows environment but always an issue if you have a web site running on a Unix-based server. If that is the case, you should select **Force all file names to lower case**.

Output name prefix — Used to add a prefix to your staged or published output to help create predictable file names when publishing to Document Publisher Server. Using this option, you can more easily distinguish between published files in different projects.

Prefixes can be added at the project, publication, and Directory Item levels. FileNet Document Publisher adds the prefixes to the output files during translation. With this feature, you can use the same source document in multiple publications of the same project.

Example You could add document.doc to both Publication A and Publication B of a project if you apply a prefix to the output file in one of the publications. If you add a "test" prefix to Publication A, that file becomes testdocument.htm during translation, while the output file name for Publication B remains document.htm.

You can add multiple prefixes in a project. Prefixes are appended to each other, and the prefix assigned to the closest publication always takes priority over other publications.

For example, your publication hierarchy and prefix settings are as follows:

Level	Prefix
Project	P
Publication 1	1
Publication 2	2
Publication 3	3
Directory Item 4	4

Using the above example:

- If you set prefixes for the Project, Publication 3, and Directory Item 4, the complete prefix appended to output files for the documents contained in the Directory Item would be **P34**.
- If you set a prefix for the Project, Publication 2, Publication 3, and Directory Item 4, the complete prefix for the documents contained in the Directory Item would also be **P34**, since Directory Item 4 is not directly related to Publication 2.
- If you set a prefix for Publication 3 and Directory Item 4, without setting any other prefixes, the complete prefix for the documents contained in Publication 3, except Directory Item 4, would be **3**. The complete prefix for items contained in Directory Item 4 would be **34**. There would be no prefix associated with items contained in the Project through Publication 2 levels.

The Map File / Print Publication tab dialog contains additional settings that are also saved to the project (see Figure 6-2):

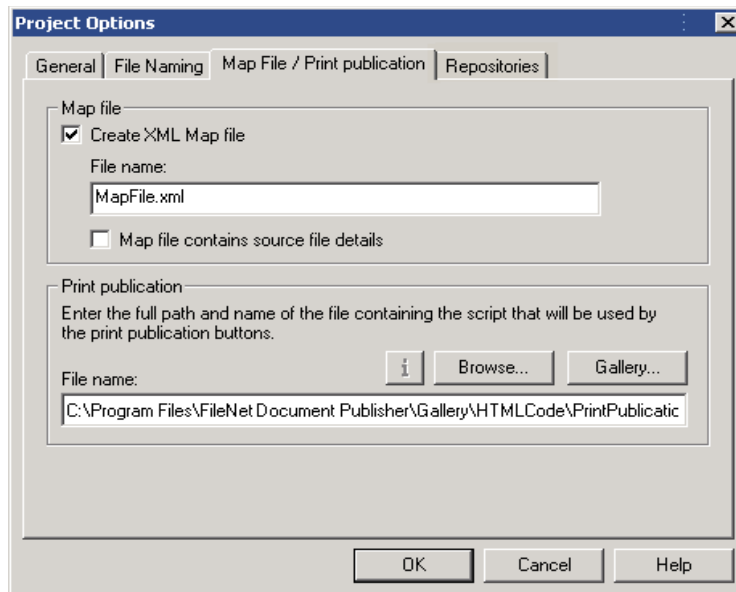


Figure 6-2 The Map File/Print Publication tab dialog of Project Options, showing the default settings, which are essential for creating an XML Map file and enabling the Print functionality.

Map file — An XML file that describes the output of your project on your Web site. By selecting the second check box — **Map file contains source file details** — the Map file will reveal the hierarchy of your source documents. FileNet Document Publisher generates the Map file by default. It is required in order to enable the print functionality.

Print publication — Necessary for identifying the script to be used in order for the Print icon (selected in **Navigation**) to work. Automatically entered by FileNet Document Publisher.

On the Repositories tab dialog of the Project Options dialog box (not shown), you have a single option: **Output page naming**. With standard naming (the default), FileNet Document Publisher simply takes the source document name and changes the extension to produce the output HTML page. Thus, Tutor.doc becomes Tutor.htm. The optional settings are relevant when using FileNet Content Services.

Application options

To review application options, click Application Options on the View menu to open the Application Options dialog box (see Figure 6-3).

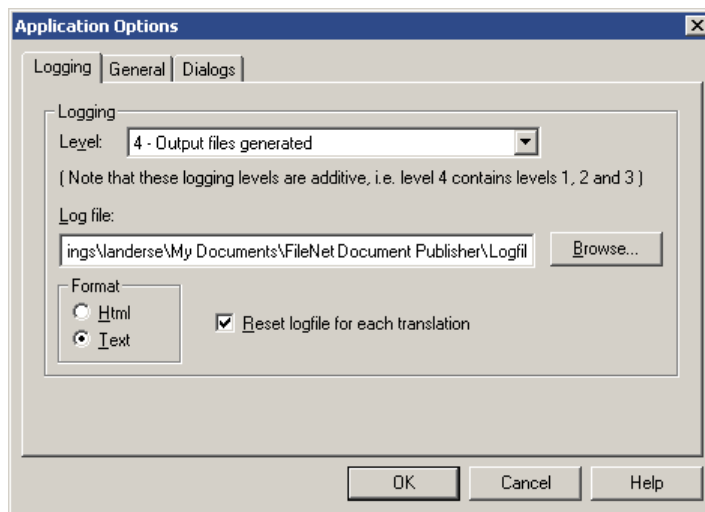


Figure 6-3 The Application Options dialog box, shown here with the Logging tab dialog open. Application options are user-specific for a given machine. If multiple users share a machine and set different options, the options in effect will be those that have been set by the user who is currently logged on.

When you first enter the Application Options dialog box, you will see the default settings shown in Figure 6-3. These settings are user-specific on a given machine. If they are changed by a particular user, the new settings will apply to all projects run on the machine by the user logged on at the time of the change. You can set the following option on the Logging tab dialog:

Logging — The translation log for your project. You can change the path and file name for the log file, if you want, and also the logging level. The default level is 4. Level 5 provides the most complete logging information. The log file will be reset after each translation (FileNet Document Publisher will create a new log file by writing over the old one), unless you change this setting. Note that you can produce the log file in either the HTML format (the default) or text format.

On the General tab dialog (see Figure 6-4), you can set options for the following:

Word processor default character style name — Important when you are using Microsoft Word. Default Paragraph Font is the name of the default character style in Word that provides the font for the underlying paragraph style of all styles in every Word template. FileNet Document Publisher recognizes this name and does not

import the style. As a result, you can format your publication without fear of the default character style overriding your settings.

If you are using a version of Word in a language other than English, you need to enter the equivalent of Default Paragraph Font in this text box. Any entry you make will be saved and will be available from the drop-down list in future.

Default output extensions — Generally, you will always want to use either **htm** (the default) or **html** as the extension for your output HTML pages. Ideally, any change to this setting should be made during project setup, because the change will apply *only* to new source documents added to the project *after* the change is made. (The **wml** extension would be used for any WML projects you create. For more information on WML projects, see “Creating a WML Project,” a PDF manual to be found in the Documentation folder of your installed directory, and also on the CD.)

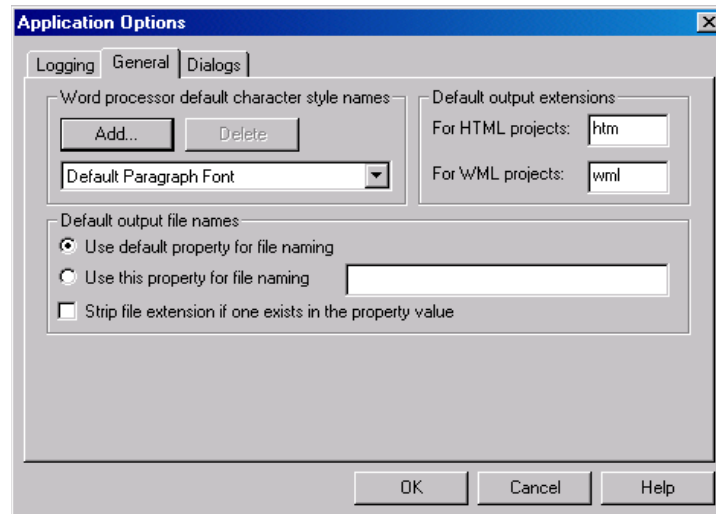


Figure 6-4 The General tab dialog, where you specify the Default Paragraph Font for the language version of your word processor. You can also set the default output extension for your projects.

Default output file names — The default setting is to use the file name of the source document for the output file name. Click **Use this property file name** if you prefer to use a metadata property for files from FileNet Content Manager or Content Services. You can also choose to strip the file extension from the original file name at the same time.

Dialogs — The Dialogs tab dialog in the Application Options dialog box (Figure 6-5) lets you toggle between showing and hiding various screens and cautions in FileNet Document Publisher.

Most are turned on by default when you first install FileNet Document Publisher. The only exception is the **Show Project Type selection dialog** check box. You can use this check box to toggle between creating an HTML or WML project. When you select this check box, the next time you start a new project in FileNet Document Publisher, the New Project Type dialog box will open, to let you choose between starting an HTML or WML project.

With **Show Selective Incremental Translation dialog** selected, you can right-click a publication in the Publication Hierarchy pane and choose **Translate Publication** from the popup menu to open the Selective Incremental Translation dialog box. Here, you can select individual publications and files to be translated. (TOCS do not appear in this dialog box, because TOCS—and framesets—are always updated with each translation.)

You can also open this dialog box by right-clicking an individual source document in the Contents pane and choosing **Translate Selected** from the popup menu. In either case, you can confirm (or change) your selection before translating.

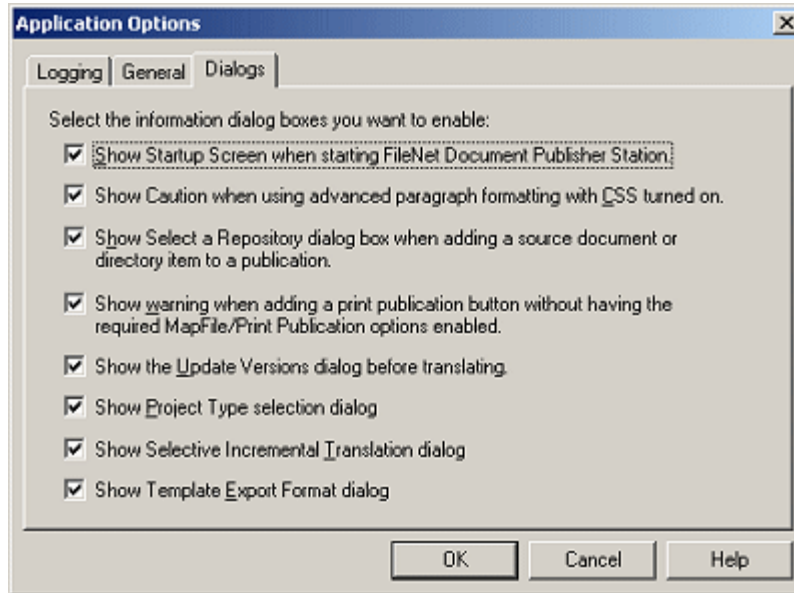


Figure 6-5 The Dialogs tab dialog of the Application Options dialog box, where you can choose to show or hide certain dialog boxes.

FileNet Document Publisher Server

Unless you are using FileNet Document Publisher Station as a standalone workstation, you are most likely using the server, FileNet Document Publisher Server, to automate the translation process. By saving all the project options listed above to your project file, all the options that affect output can now travel with the project when you schedule it for translation by the Server. This is also true if you move the project and run it on any machine other than the one on which it was created.

Viewer options

Let us quickly review the viewer options. You need to have Microsoft Internet Explorer version 4.0 or higher installed on your machine in order for Document Publisher Station to run the Preview windows found in the Choose Template and Edit Template dialog boxes.

These preview windows show only a temporary translation of the source document that you are editing. Since some effects are browser-dependent, the web page you see in the Preview window in these two dialog boxes may not match exactly the web page you view in your web browser once you formally translate the source document.

Note: You will only be able to preview a source document in the Choose Template dialog box if (a) the **Auto** check box is selected, and (b) the document in the FileNet repository has a Publish Status property.

Whichever viewer you set as your default viewer will open whenever you formally translate your source documents and click the View button on the large toolbar to view the web publication you have just created. You can associate additional web browsers with FileNet Document Publisher and have all of them available for use.

And you can easily switch between browsers to view your web publications. You can also associate utilities such as Notepad. To add viewers, choose Setup from the Viewers menu, and then click Add in the Viewers Setup dialog box to locate and select the executable of the browser you want to use (see Figure 6-6).

All the browsers you select for use in FileNet Document Publisher are available from the Viewers menu. You can also right-click the View button on the large toolbar to choose a browser from the popup menu that displays your viewer options. And you can choose Launch Viewer from the Viewers menu to launch your default viewer.

If your publication is unframed, you can view a specific source document in your browser by selecting that document in the Contents pane and then clicking View. (If none is selected, the browser will display the first document in your publication.) If your publication is framed, the browser will display the frameset for the publication selected in the Publication Hierarchy pane. (It will open the first body page of the frameset, no matter which source document is selected in the Contents pane.) If no publication is selected, the browser will display the frameset of the root publication.

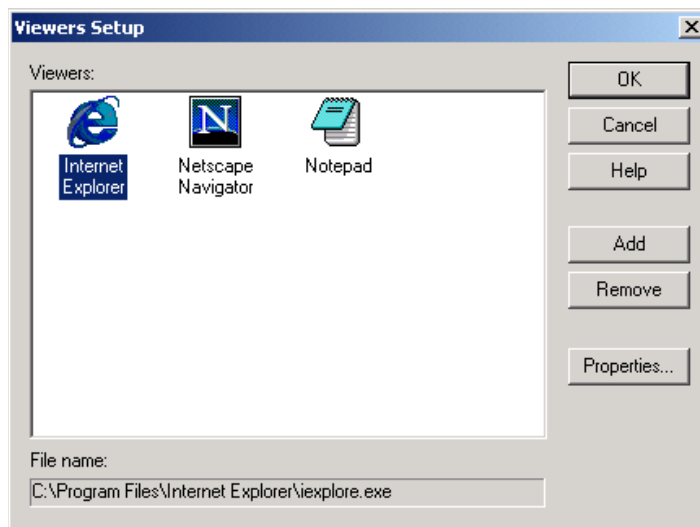


Figure 6-6 The Viewers Setup dialog box.

APPENDIX A

File formats and translation

FileNet Document Publisher translates source documents from major word processing, spreadsheet, and presentation software programs, as well as those in other common file formats. It converts graphics in many different formats. In fact, FileNet Document Publisher can convert over 225 different document and graphics formats.

In addition, FileNet Document Publisher accepts input files in HTML, XML, and PDF formats. For more information on how FileNet Document Publisher treats these files and recognizes them in your web publication, see “HTML, XML, and PDF as input files” on page 90. And for information on how a graphic can be added to a publication as a source file, see “Graphics as input files” on page 91.

You may also want to preserve files that are in special formats that you use to create your Web site. FileNet Document Publisher can pass through such files without modification and place them in the appropriate output directory so that they are recognized as part of the project. They can then be referenced from within the project and even promoted to a publication’s TOC. See “Passing through source documents without conversion” on page 91.

File formats

FileNet Document Publisher can translate over 225 file formats. The following table lists the major text formats supported:

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

Microsoft Word	through 6.0
Microsoft Works	through 2.0
MultiMate	through 4.0
Navy DIF	all versions
Nota Bene	3.0
NovellWordPerfect	through 6.1
Office Writer	4.0 through 6.0
PC-File Letter	through 5.0
PC-File+ Letter	through 3.0
PFS:Write	A, B, C
Professional Write	through 2.1
Q&A	2.0
Samna Word	through IV+
SmartWare II	1.02
Sprint	1.0
Total Word	1.2
Unicode Text	all versions
Volkswriter 3 and 4	through 1.0
Wang PC (IWP)	through 2.6
WordMARC	through Composer+
WordStar	through 7.0
WordStar 2000	through 3.0
XyWrite	through III Plus
Word processing - Windows	
Adobe FrameMaker (MIF)	6.0
Corel/Novell WordPerfect	through 12.0
Hangul	2002 (text only)
JustSystems Ichitaro	5.0, 6.0, 8.0 through 13.0, 2004
JustWrite	through 3.0
Legacy	through 1.1
Lotus Ami/Ami Professional	through 3.1
Lotus WordPro (Intel platforms)	96 through Millennium Edition 9.6
Microsoft Rich Text Format (RTF)	all versions
Microsoft Word	through 2003
Microsoft WordPad	all versions
Microsoft Works	through 4.0
Microsoft Write	through 3.0
Novell Perfect Works	2.0

Professional Write Plus	1.0
Q&A Write	3.0
StarOffice / Open Office Writer	5.2, 6.x, 7.x / 1.1 (text only)
Unicode Text	all versions
WordStar	1.0
Word Processing - Macintosh	
MacWrite II	1.1
Microsoft Word	3.0, 4.0, 98, 2001, 2004
Microsoft Works	through 2.0
Novell WordPerfect	1.02 through 3.0
Word Processing - Unix	
Star Office Writer	Version 5.2
Spreadsheet	
Enable	3.0, 4.0, 4.5
First Choice	through 3.0
Framework	3.0
Lotus 1-2-3 Charts (DOS/Windows)	through 5.0
Lotus 1-2-3 (DOS/Windows)	through 5.0
Lotus 1-2-3 (OS/2)	through 2.0
Lotus 1-2-3 for SmartSuite	97 through Millennium 9.6
Lotus Symphony	1.0, 1.1, and 2.0
Microsoft Excel Charts	2.x through 7.0
Microsoft Excel (Mac)	3.0 through 4.0, 98, 2001, 2004
Microsoft Excel (Windows)	2.2 through 2003
Microsoft Multiplan	4.0
Microsoft Works (Mac)	through 2.0
Microsoft Works (Windows)	through 4.0
Microsoft Works (DOS)	through 2.0
Mosaic Twin	2.5
Novell Perfect Works	2.0
PFS:Professional Plan	1.0
Quattro Pro (DOS)	through 5.0
Quattro Pro (Windows)	through 12.0
SmartWare II	1.02
StarOffice / Open Office Writer	5.2, 6.x, 7.x / 1.1 (text only)
SuperCalc 5	4.0

VP Planner 3D	1.0
Presentation	
Corel/Novell Presentations	through 12.0
Harvard Graphics (DOS)	2.x, 3.x
Harvard Graphics (Windows)	all versions
Freelance (Windows)	through Millennium 9.6
Freelance (OS/2)	through 2.0
Microsoft PowerPoint (Windows)	3.0 through 2003
Microsoft PowerPoint (Mac)	4.0 through 2001, 2004
StarOffice / Open Office Writer	5.2, 6.x, 7.x / 1.1 (text only)
Databases	
Access	through 2.0
dBASE	through 5.0
DataEase	4.x
dBXL	1.3
Enable	3.0, 4.0, 4.5
First Choice	through 3.0
FoxBase	2.1
Framework	3.0
Microsoft Works (Mac)	through 2.0
Microsoft Works (Windows)	through 4.0
Microsoft Works (DOS)	through 2.0
Paradox (DOS)	through 4.0
Paradox (Windows)	through 1.0
Personal R:BASE	1.0
Q&A	through 2.0
R:BASE 5000	through 3.1
R:BASE System V	1.0
Reflex	2.0
SmartWare II	1.02
Other	
Executable (EXE, DLL)	no specific version
Microsoft Outlook Express (EML)	
Microsoft Outlook Folder (PST)	97, 98, 2002, 2003
Microsoft Outlook Message (MSG)	all versions
Microsoft Project	98 through 2003 (Datasheet view)
Microsoft Visio	2003

Mime Internet mail format	
vCalendar Scheduling	1.0
vCard Electronic Business Card	Versit 2.1
WML	specification 5.2

Graphics formats

The following table summarizes the major graphics formats supported by FileNet Document Publisher. All embedded graphics in the source documents are converted according to the default setting in the Graphics tab dialog of **Formatting**. The options are GIF, JPEG, PNG, and BMP. (The WBMP format is intended for web pages that will be viewed in an Internet-enabled device.)

You can use any two or three or even all four of the options, assuming that the graphics are associated with different elements. Any linked GIF, JPEG, PNG, or BMP graphics in the source documents are “passed through” by FileNet Document Publisher during translation. All other linked graphics are governed by the settings in **Formatting**.

Format	Version
Adobe Photoshop* (PSD)	4.0
Adobe Illustrator* (AI)	through 7.0, 9.0
Adobe FrameMaker Graphics (FMV)	vector/raster through 5.0
Adobe Acrobat* (PDF)	2.1, 3.0 through 6.0
Ami Draw (SDW)	Ami Draw
AutoCAD* Interchange and Native Drawing Formats	DXF and DWG
AutoCAD Drawing	2.5, 2.6, 9.0 through 14.0, 2000i, 2002
AutoShade Rendering (RND)	2.0
Binary Group 3 Fax	all versions
Bitmap (BMP, RLE, ICO, CUR, OS2 DIB, WARP)	all versions
CALS Raster (GP4)	Type I and II
Corel Clipart format (CMX)	5 through 6
Corel Draw (CDR)	3.x through 8.x
Corel Draw* (CDR with TIFF header)	2.x through 9.x
Computer Graphics Metafile (CGM)	ANSI, CALS, NIST 3.0
Encapsulated PostScript (EPS)	TIFF header only
GEM Paint (IMG)	no specific version
Graphics Environment Manager Metafile (GEM)	bitmap and vector
Graphics Interchange Format (GIF)	all versions
Hewlett Packard Graphics Language (HPGL)	2.0

IBM Graphics Data Format (GDF)	1.0
IBM Picture Interchange Format (PIF)	1.0
Initial Graphics Exchange Specification* (IGES)	5.1
JFIF (JPEG not in TIFF format)	all versions
JPEG (including EXIF)	all versions
Kodak Flash Pix (FPX)	all versions
Kodak Photo CD (PCD)	1.0
Lotus PIC	all versions
Lotus Snapshot	all versions
Macintosh PICT1 and PICT2	bitmap only
MacPaint (PNTG)	no specific version
Micrografx Draw (DRW)	through 4.0
Micrografx Designer (DRW)	through 3.1
Micrografx Designer* (DSF)	Windows 95, 6.0
Novell Perfect Works (Draw)	2.0
OS/2 PM Metafile (MET)	3.0
Paint Shop Pro 6 (PSP)	Windows only: 5.0 through 6.0
PC Paintbrush (PCX and DCX)	all versions
Portable bitmap (PBM)	all versions
Portable Graymap (PGM)	no specific versions
Portable Network Graphics (PNG)	1.0
Portable Pixmap (PPM)	no specific version
Postscript* (PS)	Level II
Progressive JPEG	no specific version
Sun Raster (SRS)	no specific version
StarOffice / Open Office Draw	5.2, 6.x, 7.x / 1.1 (text only)
TIFF	through 6
TIFF CCITT Group 3 & 4	through 6
Truevision TGA (TARGA)	2
Visio (preview)	4
Visio	5, 2000, 2002
WBMP	no specific version
Windows Enhanced Metafile (EMF)	no specific version
Windows Metafile (WMF)	no specific version
WordPerfect Graphics (WPG and WPG2)	through 2.0, 7, 10
X-Windows Bitmap (XBM)	x10 compatible

X-Windows Dump (XWD)	x10 compatible
X-Windows Pixmap (XPM)	x10 compatible

The asterisk (*) denotes a high-end graphics format. All high-end graphics formats are provided by FileNET “as is,” without representations or warranties.

Translation issues

In this section:

- OLE Object support
- HTML, XML, and PDF as input files
- Graphics as input files
- Passing through source documents without conversion
- Disk space
- Anti-virus software
- Output HTML pages

OLE Object support

If a source document created in Microsoft Word or Excel contains an embedded OLE object, FileNet Document Publisher will, if possible, export a copy of that object. It will create not only an output graphics file as a graphical representation of the object, but also a file for the linked object itself. It will then attempt to link the graphical representation of the OLE object in the output web page to that file. If that object type is supported by the browser setup, clicking the graphic will display the object in its native format (assuming you have the appropriate application installed on your machine). See also “Preserving links to embedded OLE objects,” in online Help.

Note: FileNet Document Publisher cannot export multimedia objects (only the graphical representation of the file will display in the output page). Also, to enable this functionality, you must check **Preserve links to embedded OLE objects where possible** on the Options tab dialog of Globals for the template you associate with your source documents. And in the source document itself, be sure to turn off the options **Float over text** and **Link to file** for the object.

HTML, XML, and PDF as input files

In addition to creating HTML and XML output files, FileNet Document Publisher can also accept these formats as input files. And it can incorporate PDF files into a web publication by creating a page linked to the original file, which can be opened in its native format if the user has Adobe Reader installed. You can also set pass-through conversion options for these file types to add the files to your project in their original format, using their original file names and extensions, and creating a direct link to the file from the publication TOC.

HTML input files — When HTML files are added to a project as source documents, the HTML files remain intact, but you can make them consistent with other web

pages in the project by enhancing them with a common background, a title, and navigation buttons.

When you translate files that have linked graphics, such as HTML files, the graphics are copied to the output directory. If you have two HTML source documents that have links to different graphics with the same name, the resulting graphics file names will be incremented to keep them from overwriting each other.

Note: When FileNet Document Publisher translates an HTML file, information in the <HEAD> of the file, including Meta tags, will be passed through unchanged. The element Title will be assigned to any titles in the Head. If you want to add an HTML file to your publication in its original format, such as to preserve background and link colors set in the file, you may want to select the pass-through conversion option. See “Passing through source documents without conversion” on page 91 for more information.

XML input files — These will be passed through completely unchanged to the staging or publishing area. Their existence will be noted in the TOC and in the XML Map file. How different browsers (or other viewers) render the file may vary. You can also set a pass-through conversion option for an XML document or Directory Item, explained in “Passing through source documents without conversion” on page 91. The XML file is treated the same whether you add it as an input file or set the pass-through conversion option for the file.

PDF input files — The original files are passed through to the staging or publishing area. FileNet Document Publisher creates a page as a placeholder for the PDF file at the appropriate point in the publication. This page is linked to other output pages, according to its order in the translation process. In addition, the page contains a link to the PDF file (FileNet Document Publisher uses the name of the file as an identifier). When the user clicks the link, the PDF file will open in its native format in Adobe Reader, assuming that application is installed on the user’s machine.

Note: You can also link a PDF file directly from the TOC, instead of from a separate web page, so the user can open the PDF file from the TOC. See “Passing through source documents without conversion” on page 91 for more information.

Graphics as input files

Graphics files can be selected as input files in FileNet Document Publisher. When FileNet Document Publisher converts a graphics file, it will generate a separate HTML file with navigation buttons and a link to the graphic (just as it does for a source document) so the graphic displays on the web page. FileNet Document Publisher also handles multi-page graphics. Multi-page images will be displayed in a single HTML file with a title based on the source file name. The title will be represented as a Heading 1 element, which you can use to split a multi-page image into multiple HTML files.

If you want to add a complex graphic to your publication that remains in its original format, you may want to use the pass-through conversion option, described below.

Passing through source documents without conversion

The files you use to create a web publication may include those in special formats (such as AVI or PDF) that you want FileNet Document Publisher to preserve. FileNet Document Publisher can pass through such files and place them in the appropriate output directory so that they are recognized as part of the project. They can then be

referenced from within the project and even promoted to a publication's Table of Contents (TOC).

You can set pass-through conversion options for Directory Items and documents.

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

When you set pass-through conversion options for a file, that file does not contain navigational buttons and background colors that may be set for other web pages in your web site. This can be useful if you want to link to a PDF file directly from the TOC so the user can open the PDF file from the TOC. (In this case, the user will have to have Acrobat Reader installed on his or her machine. Other files you pass through may require other applications to be available on the user's machine.)

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

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

Notes

- To reference a passed-through document in the TOC, promote Title (System), which is the only element available for TOC promotion when using this option.
- If you do not promote the title of a passed-through document to the TOC, the file is essentially the same as an associated file in FileNet Document Publisher. See "Associating a file with a publication" in the Help system for more information on associated files.
- If you choose to treat the files in a Directory Item in a manner similar to associated files, be sure to add the Directory Item to a publication that contains no TOC and no framesets and use a template that contains no promotion to reference pages.
- You can also include a PDF file in a web publication as a web page that contains a link to the original file. See the previous section, "HTML, XML, and PDF as input files" on page 90 for more information.

Disk space

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

Anti-virus software

Conflicts can occur with anti-virus software if you frequently run translations that can result in large log files. With frequent translations, the log file may be more or

less continuously updated. Since the log file is frequently changing, it can attract a lot of attention from anti-virus software. As the anti-virus software attempts to review the entire file, more changes could get made to the file. This results in a deadlock situation, where the anti-virus software cannot catch up.

We recommend that you use a unique extension for the log file and set your anti-virus software to ignore files of that extension type. (Choose Application Options from the View menu to set logging options.)

Output HTML pages

If you delete a source document from a project, the history file will also be updated but the output HTML file from the last translation will not be removed. It is recommended that you delete all files from your output directories before carrying out your final translation.

About styles in Excel and PowerPoint

The following may be helpful if you are creating web pages from spreadsheets created in Microsoft Excel or presentations created in Microsoft PowerPoint.

Note: FileNet Document Publisher ships with templates specifically designed for source documents created in Microsoft Excel and Microsoft PowerPoint:

- MS Excel and MS Excel TOC
- MS PowerPoint and MS PowerPoint TOC

Ideally, you should associate these templates with your Excel and PowerPoint source documents, respectively.

Styles in Microsoft Excel

Styles in Microsoft Excel are based on the formatting of the cell. ("Style" here relates to the treatment of numeric values, not to formatting attributes that apply in the case of a Word file, for example.) The Heading 1 style is created by FileNet Document Publisher; the others are default styles in Excel:

Heading 1

Comma

Comma [0]

Currency

Currency [0]

Normal

Percent

Heading 1 represents the name of each worksheet. By default, FileNet Document Publisher creates this style and uses it to split a spreadsheet during translation in order to create a separate HTML file for each worksheet.

Creating a new style in Microsoft Excel

To create a new style in Microsoft Excel, open your spreadsheet and do the following:

1. Select a cell that has the combination of formats you want to include in the new style.
2. From the Format menu, choose **Style** to open that dialog box.
3. In the Style Name text box, type a name for the new style.
4. Click **OK**.

The new style you have created can now be applied to any selected cells in your spreadsheet. It will be saved with the spreadsheet and used to create a new element when the spreadsheet is imported. If the spreadsheet is already part of a project in FileNet Document Publisher, you can simply open that publication, right-click the spreadsheet in the Contents pane, and choose Import and then Styles.

Styles in Microsoft PowerPoint

When you add a Microsoft PowerPoint presentation to a project, FileNet Document Publisher imports the styles in the slides that form the presentation.

In general, FileNet Document Publisher translates content relating to the following:

- Title
- Body text
- Top-level text objects (the content of text boxes that are not inserted in graphics)

The following table summarizes styles available after a PowerPoint presentation has been added to a project, and shows how the styles are mapped in FileNet Document Publisher.

Style	Element	Comment
Automatic Heading	Heading 1	Style created by FileNet Document Publisher where a slide has no title or heading. It is applied to the title and also creates a slide number, based on the slide's position in the presentation (e.g., "Slide 7").
Center Title	Heading 1	A PowerPoint style used for the title of a Title slide.
Heading 1	Heading 1	Style created by FileNet Document Publisher and applied to the title of a regular slide.
Slide	Slide	Style created by FileNet Document Publisher for all slide images (thus allowing them to be turned on or off in the output web pages).
Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element.
Center Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element.
Half Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element.
Quarter Body 1 to 5	Body 1 to 5	All Body styles are mapped to the Body element.
Note 1 to 5	Note 1 to 5	Notes displayed in PowerPoint's "Speaker Notes" view.
Text 1 to 5	Text 1 to 5	Text added by user; only top-level text objects are translated
Notes Footer		Ignored by FileNet Document Publisher
Notes Header		Ignored by FileNet Document Publisher
Slide Footer		Ignored by FileNet Document Publisher

APPENDIX B

Templates and graphics sets

FileNet Document Publisher ships with a set of templates in Default.tcp, the default project file, which are available each time you start a new project:

- there are 28 graphics Sets in FileNet Document Publisher
- in addition to the standard navigation buttons, all the graphics Sets include Print, Link to Source, Top of Project, and Specific Page links

You can view the graphics Sets in the Gallery, in the Sets mode. The templates are listed in the Manage Templates dialog box (except for the default reference page templates—Default TOC, Default LOF, Default LOT, and Default Index—which you select in the Add Reference Page dialog box when you create a new template).

Note: A second default project file, DefaultWML.tcp, is used to create WML projects. (Like Default.tcp, it resides in the .\Resources\en folder, with a copy available on the CD-ROM.) DefaultWML.tcp has a far more limited selection of templates. For more information, see “Creating a WML Project” in the Documentation folder of your directory.

In summary

- There are 19 body templates.
- The Blank template contains no styles, ranks, patterns, or metadata, or any of the other default settings noted below. This is the template to use if you simply want to “pass through” a source document to see how it looks without any special formatting (and this is the template that FileNet Document Publisher uses when you create a new template and do not base it on another template).
- 14 other general-purpose templates have various default settings (promotion, splitting, etc.), as noted in the second table below. These templates also have complementary TOC, and Index templates. (The same graphics Set is associated with all three templates in each group to ensure a consistent look throughout your publication.)
- The 4 remaining body templates are designed for source documents created in spreadsheet and presentation applications. They have a complementary TOC template, but no Index.
- Templates with “CSS” in their name have Cascading Style Sheets turned on.

Templates and graphics Sets in Default.tcp

The table below lists all 19 body templates in the default project file. The graphics Set listed for each body template is also associated with the TOC and Index templates, where available. (There are 28 graphics Sets in FileNet Document Publisher, so not all are used.)

Template	Graphics Set
Academy	Aqua Weave
Acclaim CSS	Investment

Template	Graphics Set
Account	Clearing House
Adagio CSS	Gray Tab
Administration	Planner
Analysis	Grouted Tiles
Archive CSS	Scalloped
Blank	
Business	Blue Bevel
Ceremonial	Blue Mexico
Courtesy CSS	Cranberry Script
Executive	Gray Tab
Introduction CSS	Blue Peach
Lotus 1-2-3	Royal Cloth
Lotus Freelance	Olive
MS Excel	Skill Set
MS PowerPoint	Maroon Sand
Purple Frost	Lilac Spiral
Retrofied! CSS	Salmon Retro

Default settings for 14 general-purpose templates

Following is a list of the default settings for the 14 general-purpose body templates. This is not necessarily a complete list of the settings. If you decide to use any of these templates, you should check the template before using it.

Feature	Default Setting
Graphics Set	See table above
Elements promoted to TOC	Title and Heading 1
Treatment of elements on TOC	Title flush left, Heading 1 indented
Split	On Heading 1
Fonts	Take from Source, Arial, or Verdana
Navigation buttons in Body	Previous Page, Next Page, TOC, and Index (TOC and Index display only if your publication has a TOC and Index)
Navigation buttons in TOC	None
Navigation buttons in Index	None; Index may contain an Element Text Bar
Navigation buttons in Query	None
Ranks	Lowest 1, Title, Lowest 2, Heading 1
Character patterns	HTTP, Weblink, Email

Feature	Default Setting
Metadata	Keywords
Imported graphics	Converted to Gifs; no alignment
Cascading Style Sheets (CSS)	Turned on for those templates with "CSS" in their name
Link colors	Specified, but vary with template

Default settings for 4 specialized templates

The following table lists the four specialized templates for use when the source documents were created by using one of the spreadsheet or presentation applications shown. See Appendix A, "File formats and translation" on page 84, for more information on using these applications with FileNet Document Publisher.

Template	Comment
Lotus 1-2-3	No ranks or metadata.
Lotus 1-2-3 TOC	
Lotus Freelance	Default styles: Automatic Heading, Heading 1, Normal, Slide, and Speaker Notes.
Lotus Freelance TOC	
MS Excel	No ranks or metadata.
MS Excel TOC	
MS PowerPoint	Includes a number of default styles not assigned to elements: Body #1, Body #2, etc.; Center Body 1, Center Body 2, etc. See Appendix A for more information.
MS PowerPoint TOC	

Template guidelines

Here are a few guidelines to consider when managing templates:

- The templates in the default project file are simply a starter list. If you use any of them, it would be best to first review the template settings to confirm what is listed here and to identify any settings that may not be listed.
- If you use any, it would also be best to create a new template based on the template you want to use—giving it a unique name in the process. That way, there will be no danger of ever overwriting the new template.
- When you rename a template, it is best to do so in the Manage Templates dialog box, which displays the *underlying* name of each template. This name will be retained in the template even if you rename the template as you export it or rename the template file in Windows Explorer. When you import a template into a project, FileNet Document Publisher recognizes the underlying template name and compares it to the list of templates already in the project. If there is a match, you can either overwrite the existing template or rename the one you are importing.

- Project files can be quite large (even when zipped). If you want to keep project files small, you might want to delete those templates you are not using. Alternatively, you can edit the project file by exporting most of the templates and “parking” them in a safe place. You can then simply import them as you need them. You might want to do this with the template files you create as well as the ones supplied by FileNet Document Publisher. Of course, with FileNet Document Publisher’s linking functionality, you can always link to a “parked” (external) template. However, you will have to import the template into a project in order to edit it.
- Any templates you have been using with a previous version of FileNet Document Publisher can still be used when you import a 6.5 (or earlier) project file into FileNet Document Publisher 7.0. You can also import old templates into the new default project file. (You will first need to export those templates from the old projects and import them into the default project file. Chapter 2 of the Installation Guide explains how to edit the default project file.)

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