



FileNet Document Publisher

Tutorial

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Introduction

Here are a few pointers to help you complete the lessons in this Tutorial:



- The Tutorial is available directly from the Startup Screen and the Help menu.
- If you have not completed the “Seven Easy Lessons,” you might want to do so before tackling the Tutorial. (The “Seven Easy Lessons” are also available from the Startup Screen and the Help menu.)
- When you first use the Edit Template dialog box, check to be sure that Auto is selected under Preview Update. With Auto selected, Document Publisher Station will automatically update the Preview window each time you make changes to the template and return to the Edit Template dialog box. This will take a few seconds each time (longer, when you first enter the dialog box, as Document Publisher Station loads the browser controls). If you prefer, you can clear the check box and click the Preview Update button each time you want to review your changes.
- The project files you will use throughout the Tutorial are to be found in the `..\FileNet Document Publisher\Samples\en` folder. The source documents referenced in these project files are the styled documents in `..\FileNet Document Publisher\Samples\en\Styled` and the manually formatted documents in `..\FileNet Document Publisher\Samples\en\Formatted`. If you can, open the styled documents in Word, print them, and mark them up to denote each of the styles used in each document. This may facilitate your understanding of templates and elements as you format the source documents in Document Publisher Station and turn them into web pages. Any source document listed in the Contents pane as part of a FileNet Document Publisher project can be opened in its native format from there. Right-click the document in question and choose View Source Document from the popup menu that appears. The source document will open in its native format, assuming you have the appropriate application available from your machine.
- If you want to save your work as you go through the lessons, be sure to save the project file at the end of each lesson. And if you know that you might want to rerun the lesson later, at the start of each lesson you should save the project file under a different name or in another location, so that you can always return to the original project file at any time.
- A special output directory has been designated for most projects (some lessons don't involve translation). You can check this for any publication by right-clicking a publication in the Publication Hierarchy pane and selecting Properties from the popup menu to open the Publication Properties dialog box. As you complete your first translation in each lesson, the appropriate folder will be created by Document Publisher Station to accommodate the output pages you create. So at the end of the Tutorial, you will have folders for most lessons (`..\FileNet Document Publisher\Output\Lesson 1`, etc.). Once you have completed the Tutorial, you can reopen any of the project files at any time to experiment with the templates for the web publications you have created.
- If you installed to a directory other than the default, warning messages will appear as you load the various project files for these lessons. Document Publisher Station simply wants to know where the source files are. You should browse to identify their new location.
- Remember: When you click OK to leave a property sheet, tab dialog, or dialog box, you have not actually saved your changes to the template until you have

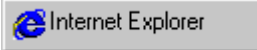
returned to the Document Publisher Station main window. Moreover, you have not saved the template itself until you formally save the project file by clicking Save on the toolbar (or choosing Save from the File menu).

- For the purpose of these lessons, special output directories have been designated for many of the projects. For any new projects you create, however, Document Publisher Station will use a default output directory. (You can check the default output directory in the Properties dialog box for the root publication.)

C:\Documents and Settings\\My Documents\FileNet Document Publisher\Output

- Throughout the lessons, the instruction to open your browser and view web

pages is given as **View**  or **View** . This is a short-form reference for the Launch Default Viewer command, which is available from both the standard toolbar and the large toolbar. When clicking the command on the standard toolbar, you will see the icons as above. However, when clicking the command

on the large toolbar, you will see:  and



Note that the icon on both toolbars changes, depending on which browser (or other viewer) you are using.

LESSON 1

Creating a frameset

Whether your web publication has a large number of web pages or just a few, you need to organize the contents of the publication to help your readers quickly find the information they need. A **frameset** can help structure content, while a **reference page** can improve the accessibility of that content.

Note: As an alternative to a frameset, you can use HTML Table or custom table layout to organize the content of your web pages. These alternatives are discussed in online Help.

A frameset is simply a collection of frames that fill the browser window. One frame is used for all body documents; the other frames can contain reference pages, URL links, and graphics. Document Publisher Station lets you create four different types of reference page: a publication Table of Contents (TOC), a List of Figures (LOF), a List of Tables (LOT), and an Index. Each reference page is a separate HTML file, which Document Publisher Station builds during translation.

In the Seven Easy Lessons, you promoted headings from a source document to create the type of TOC you would expect to find at the beginning of a book. In Document Publisher Station, reference pages are quite versatile. With the exception of the Index, you can promote any element in any source document to any of the other three reference pages. The source documents do not even have to share the same template, as reference pages will accept elements from more than one template.

In this lesson, you will

- Create a frameset for your publication
- Add a reference page to the publication
- Promote elements from the source documents
- Include the elements in the reference page
- Turn off links to the web pages for the source documents
- Format the reference page

Create a frameset

1. Open **Promote.tcp** from the `..\FileNet Document Publisher\Samples\en` subdirectory.

To adjust the two panes, place your cursor on the divider and move it to the left or right. Likewise, to expand or contract any column in the Contents pane, place your cursor on the dividers between the column headings.

The publication name appears in the Publication Hierarchy pane and above the Contents pane. In this case, it also happens to be the name of the lesson. As you can see, you can create descriptive publication names while keeping the project file name (which displays in the title bar) simple. The red crosses in the Status column confirm that you have not yet translated the source documents.

2. Click **Layout** on the toolbar to open the Layout dialog box.

3. Under Active Layout, select Frame Layout to open Frameset Layout.
4. Click the **New Vertical** button. You have created a frameset consisting of two vertical frames. You can resize the frames, but for this lesson we will accept the defaults.
5. Place your cursor in the Components box at the bottom-left (note how it changes from a pointer to a hand), and drag the TOC icon from that box and drop it into the frame named trFrame1 (see Figure 5-1).
6. Click **OK** to accept the frameset for your publication and return to the main window.

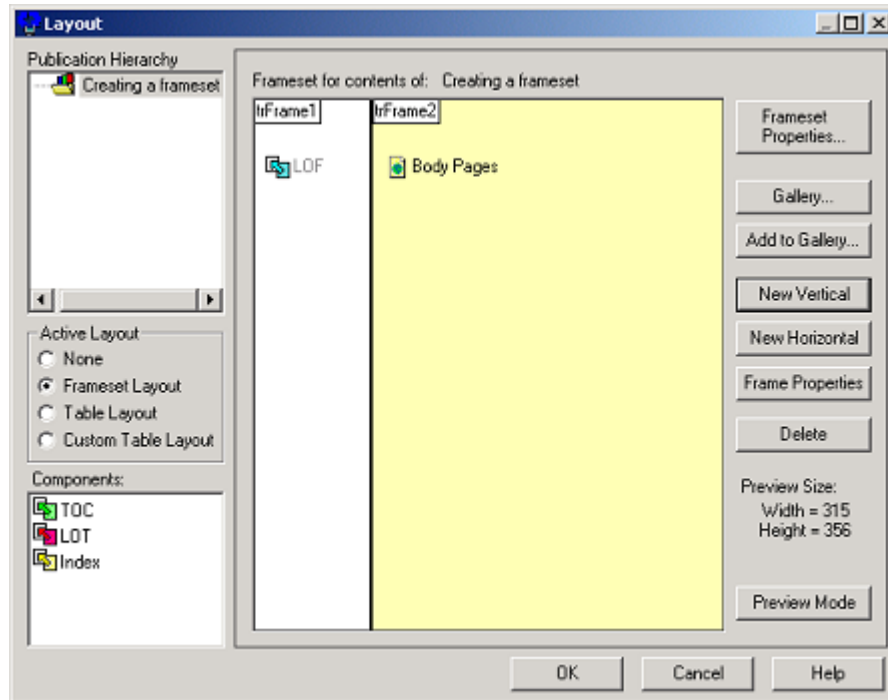



Figure 5-1 A simple frameset with the TOC placed in trFrame1 and body documents assigned to trFrame2.

You have created a simple frameset that sets the *structure* for your web publication. By default, Document Publisher Station automatically assigns body documents to one of the frames of a frameset (in this case, to trFrame2). However, for the TOC (in trFrame1) to display in your browser, you must formally add the TOC to your publication in the Contents pane.

Add a reference page to the publication

Rather than build a typical TOC, you are going to create an abstract, which is simply a summary of the contents of different source documents. This is possible because each source document used for this lesson contains a paragraph that summarizes the document's content. In addition, a unique element has been associated with this paragraph.

1. Click **Add Reference Page**  on the toolbar to open the Add Reference Page dialog box (see Figure 5-2).
2. Under Type, accept the default Table of Contents (TOC).

3. In the Name text box, type **Abstract**.
4. Click the **New** button to open the New Template dialog box.
5. In the Name text box, type **Abstract**.

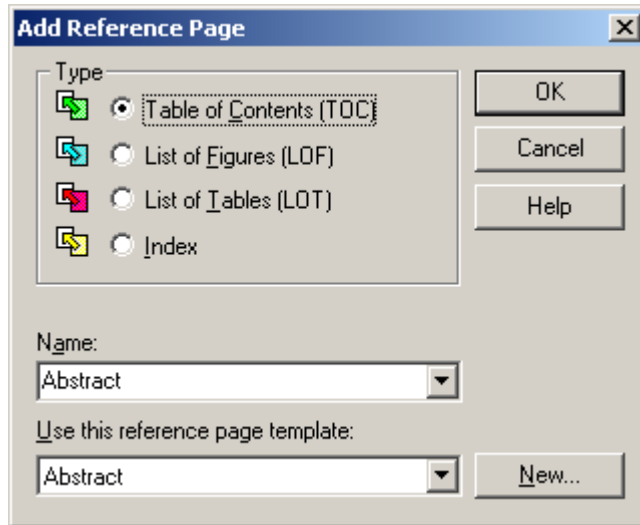



Figure 5-2 Here, we are naming both the new reference page and its template “Abstract.”

6. From the Based On list, select Business TOC, a reference page template. Note that in creating a new template, you can turn on cascading style sheets (CSS). We will talk more about CSS in Lesson 2.
7. Under Template Type, make sure that **Reference** is selected.
8. Click **OK** to return to the Add Reference Page dialog box.
9. The **Use this reference page template** drop-down box now lists Abstract, which is an exact copy of the Business TOC template (Figure 5-2).
10. Click **OK**. The Contents pane now displays an output page named Abstract and also a template of the same name.

The next step is to identify the content you want to go into the reference page. To do this, you promote the appropriate elements in the body page template of the source documents. In this lesson, you will promote the content associated with the elements Intro and Title.

Promote elements from the source documents

1. In the Contents pane, select any of the source documents and click **Element**

Setup  on the toolbar. Since you are editing the template, not the source document, and the same template is associated with all the source documents in this publication, it does not matter which document you select.

In Document Publisher Station, two elements are promoted by default in any body page template: Heading 1 and Title (System). But for this project file—as you can see from the elements list in the Elements tab dialog (Figure 5-3)—only Heading 1 is being promoted (the element name appears in the Promote As column).

2. In the Elements tab dialog, select the **Intro** element and click **Properties**.

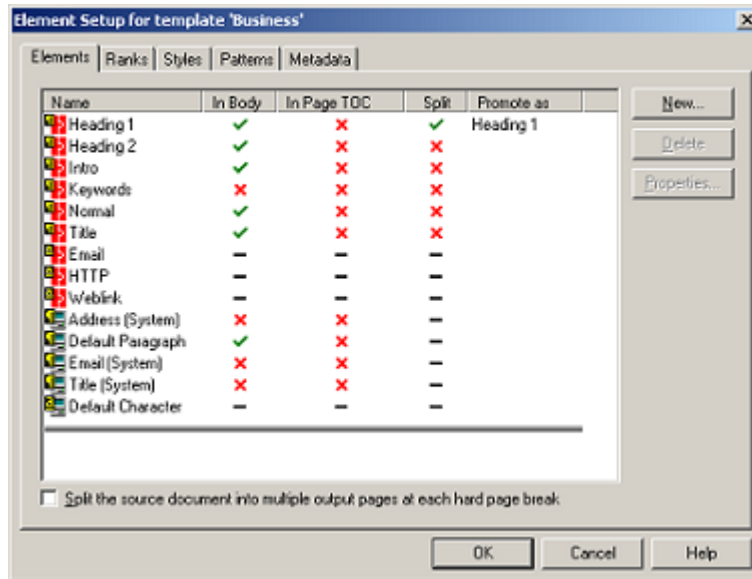


Figure 5-3 Heading 1 is the only element currently being promoted.

3. Click **Promote** to open that tab dialog (see Figure 5-4).
4. Click **Promote this element, making it available to all reference pages**. Accept the default name Intro in the Promote As text box.
5. Click **OK** to return to the Elements tab dialog. The element name is now listed in the Promote As column.

An element is promoted under its own name, unless you change it. This typically is not a problem because promoted elements can be formatted differently for the reference page template. But you might want to use a different name if you are promoting different elements from different templates and want to format all the elements the same way in the reference page template.

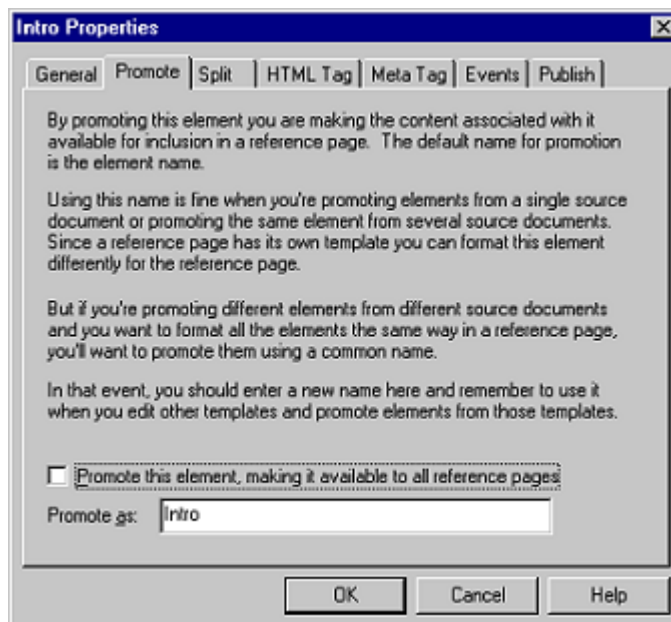



Figure 5-4 The Promote tab dialog in Element Properties.

6. Now select the **Title** element, but this time double-click in the Promote As column. “Title” will appear in the column. You can use this method of promoting elements if you don’t want to change the name.
7. Double-click **Heading 1** in the Promote As column to turn off promotion for that element.
8. Click **OK** to return to the main window.

You have promoted two elements and are ready for the next step. Since any promoted element becomes available to any of the three reference pages (TOC, LOF, and LOT), you must now formally include Intro and Title in the body of the Abstract reference page (TOC). You do this by editing the reference page template.

Include elements in the reference page

1. In the Contents pane, select **Abstract** and click **Element Setup**  on the toolbar.
2. Select **Intro** and double-click the first red cross, in the In Body column, to turn it into a green check mark.

You have placed this element in the body of the reference page, which means that the content associated with the Intro element will appear in the web pages created from the source documents. You do not have to do this for Title, because Title is one of three elements included by default in a TOC (the reference page type you chose for the Abstract). The other two are Heading 1 and Title (System), which we do not want to include.

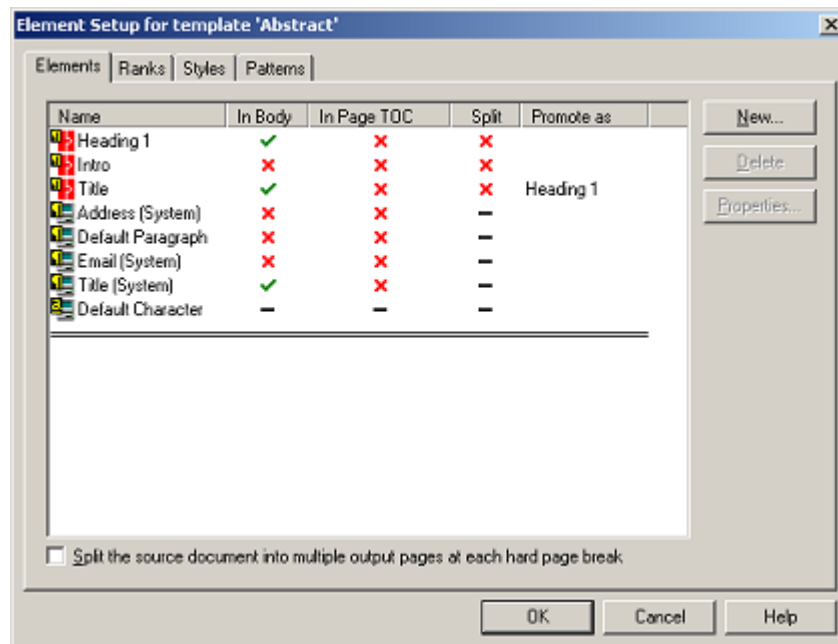


Figure 5-5 Element Setup, showing the settings for the Abstract reference page when you first enter the Elements tab dialog.

The three “System” elements are explained later in the Tutorial. Briefly, Title (System) is the element used to create a title for your web publication. Even though Title (System) was not promoted from the source documents, each

reference page template has its own title. So the element name was also listed when you entered **Element Setup** with the reference page template selected.

3. Select **Heading 1** and double-click the green check mark in the In Body column to turn it into a red cross. Do the same for **Title (System)**.


You have added Intro to the Abstract, to join Title, and you have removed Heading 1 and Title (System).

When an element is included in a reference page, Document Publisher Station automatically generates a link from the reference page to that element in the web page (the translated source document). In this case, you do not need to link the whole introductory paragraph to the web pages that you will create from the four source documents. The title will suffice.

Turn off links from the Abstract to the web pages

1. With the Elements tab dialog still open, select **Intro** and click **Properties**.
2. Click **Links** to switch to that tab dialog.
3. This tab dialog is available only when you are editing a reference page template.
4. From the Link Type drop-down list, select **No Link**, and click **OK**.
5. Click **OK** to return the main window.
6. The content in the Abstract that is associated with the Intro element is no longer linked to the web pages created from the source documents. But Title still is.

7. Click **Save**  on the toolbar to save the project file and its templates.

8. Click **Translate**  on the toolbar to translate the publication.

Note that when the translation is completed, the red crosses in the Status column turn to green check marks.

9. In the Contents pane, click **View**  on the standard toolbar. Your web browser will open to display your web publication. Since your publication has a frameset, it does not matter what you select in the Contents pane; the frameset will always open. (See Figure 5-6.)

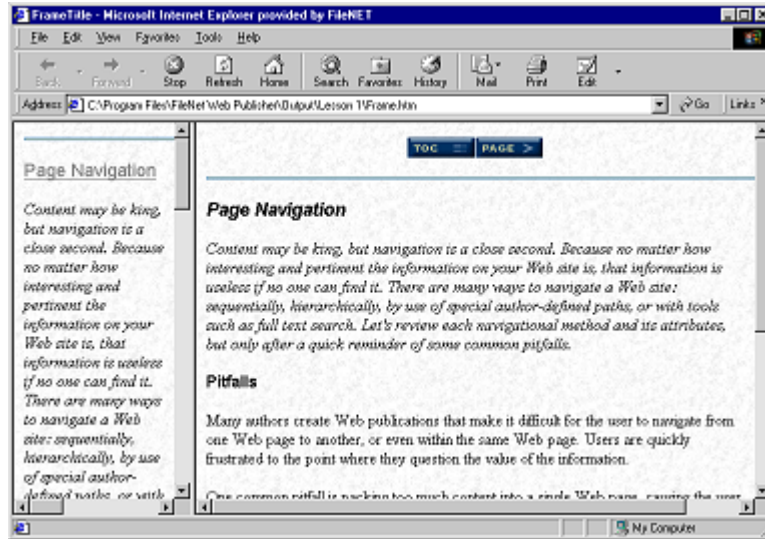



Figure 5-6 Your translated project in Internet Explorer. You can use the Title headings in the TOC to jump from one source document to another. If you use the navigation buttons to page through the web publication, note how the publication has been broken up into smaller web pages. By default, a FileNet publication splits on Heading 1.

Your web browser will open to display your web publication. Instead of the TOC you created in Seven Easy Lessons, you will see the title for each page and a short description (abstract) of each page's content. Pass your cursor over the text and you will see that the titles (associated with the Title element) are linked, but the Intro text is not. (You may have noticed that the Abstract does not have an overall title. That is because you removed Title (System) from the body of the reference page. Adding titles to web pages is addressed in Lesson 8.)

You can format the element of a reference page just as any other element. As the Abstract is not a standard TOC, a few changes will improve its appearance. Remember: the template you are using is one of the reference page templates designed specifically for a TOC. So some assumptions have been made.




For example, templates for TOCs include the automatic indentation of heading levels (the lower the heading level, the greater the indent). That is something to watch for with most TOCs. But Title is not one of the elements usually indented, so it is not an issue here. However, there is some formatting you might do.

Format the Abstract

1. In the Contents pane, select **Abstract** and click **Edit Template**  on the toolbar.
2. Pass your cursor over the Preview window and notice how a tooltip highlights each element of the template. That is one of the advantages of using the Edit Template dialog box when editing your templates.
3. Click the **Formatting** button to open that property sheet. From the Elements List, select **Title**. On the Character tab dialog, under Font Color, click the **Color** button to open the Color dialog box. Then select a color and click **OK**.

4. Under Text Effects, click the **Effects** button to open the Effects dialog box. From the **Bold** drop-down list, select **Always On**; and from the **All Caps** drop-down list, select **Always On**. Click **OK** to return to the Character tab dialog.
5. Click **OK** again to return to the Edit Template dialog box. View your changes in the Preview window. Note how content associated with the Title elements is now bold and set to “all cap,” and that the color is the one you selected in the Color dialog box.
6. Click **OK** to return to the main window.

Be careful about changing the colors of elements in reference pages. In most instances the text in question represents a link to content in the body pages, and you may want to treat links in a standard way. See Tip 5.

1. Click **Save**  on the toolbar to save the project file and its templates.
2. Click **Translate**  on the large toolbar to translate the publication.
3. Note that when the translation is completed, the red crosses in the Status column turn to green check marks.
4. Switch to your browser and click Refresh or Reload. (If you closed your browser, click **View**  on the standard toolbar.) Note how the Title element has changed, just as you saw it in the temporary translation in the Edit Template dialog box.

Keep the project open. You will need it for Lesson 2.

Tips

1. Framesets are a powerful tool for helping you structure and organize the contents of your web publications. As you will discover in a later lesson, you can use a different frameset for each publication in your project.
2. Reference pages are very flexible, since you can promote any element to a TOC, LOF, or LOT reference page. You can even promote graphics and create thumbnails for a reference page.
3. An Index is slightly different. To create an index, you must already have index markers placed in the source document. Document Publisher Station will pick up the index markers and use them to create an Index. If you try to create an Index with a document that does not have index markers, you will get nothing.
4. A default setting in the Business template is to split the output on Heading 1. (You can check this by selecting one of the source documents in the Contents pane and opening **Element Setup** again. In the Split column on the Elements tab dialog, note the green check mark opposite Heading 1.) As a result, Document Publisher Station breaks a source document into multiple output pages, each one beginning with Heading 1. You can check this in your browser by clicking the navigation buttons at the top of each page.
5. The colors of linked content in a reference page can be set in the Colors tab dialog in **Globals**. Whatever default colors you set there for Link, Visited Link, and Active Link will be used for all elements in the reference page that are linked to the body content. If a color for a link is not specified there, Document Publisher Station uses default colors, which are bright blue for links and purple for visited links.

LESSON 2

Formatting text with CSS

Document Publisher Station contains a number of tools for fine-tuning the layout and look of text in your web publications. One of the more important of these is Cascading Style Sheets (CSS), which Document Publisher Station implements by means of embedded, inline styles.

You can take a simplified approach to formatting text in your web publications by ensuring that the setting for CSS is turned off. This setting can be found in the Options tab dialog of **Globals** (see Figure 6-1). It is turned off by default, but it is automatically turned on for certain templates in the default project file (those with “CSS” in their name), which you can use in any project.

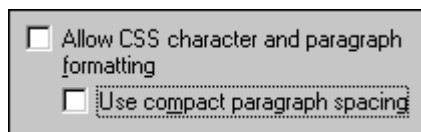


Figure 6-1 The Allow CSS Character and Paragraph Formatting setting in the Options tab dialog of Globals is turned off by default. It is turned on for those templates in the default project file with “CSS” in their name.

With CSS turned off, you still have many formatting options in Document Publisher Station. But if you select this check box, you will find additional options and settings available in the Character and (especially) Paragraph tab dialogs of **Formatting** that can significantly improve your ability to fine-tune the appearance of text onscreen. (CSS can also be applied to page and element text bars, in **Navigation**.)

The CSS option is template-based. When you use this switch, it applies only to the template selected in the Contents pane when you open **Globals**. So if your project contains several templates, you may want to select this option for each one (including the reference page templates), assuming you want to take full advantage of CSS throughout your publication.

In this lesson, you will continue to work with the project file you used in Lesson 1. Open the project file now if you closed it after completing Lesson 1. (If you closed it, you will see it listed at the bottom of the File menu and also as The Last Publication Used on the Startup Screen.)

Before starting the lesson—and to appreciate the power of CSS—you may want to spend a little time in the Character and Paragraph tab dialogs of **Formatting**, first with the switch on, then with it off. With the switch on, the Character tab dialog shows one change: the opportunity to select a specific font size. There are many more changes in the Paragraph tab dialog, most of which will become readily apparent.

In this lesson, you will

- Change the publication name, save the project file under a new name, and change the output directory
- Turn on the CSS option in Globals
- Format the TOC, using additional formatting options available
- Format the body pages, likewise using CSS options


Change the publication name




If you want to save your completed project file for Lesson 1, you need to rename the file for use in this lesson. At the same time, you should also change the publication name.

1. Open **Promote.tcp** if it is not already opened.
2. Click **Save As** on the File menu and save the project file under the name **Format.tcp** in the same folder as Promote.tcp.
3. Right-click the publication **Creating a frameset** in the Publication Hierarchy and choose **Properties** from the popup menu.
4. In the Publication Properties dialog, select “Creating a frameset” in the Publication Name text box and Publication Title text box, in turn, and type **Formatting text with CSS**. Under Output Directories, change the paths for both Pages and Graphics to ..\Output\Lesson 2.
5. Click **OK**.
6. From the File menu, choose **Save**.

You have now saved the project file under a new name, changed the title and name of the root publication, and created a new output directory (so that your translated output for this lesson won't overwrite your translated output for Lesson 1).


Turn on CSS

Before turning on CSS, click **View**  on the toolbar to view the web publication you created in Lesson 1. You will get a warning message to translate the project first. By saving the project under a new name, you created a new history file that contains no record of a previous translation. So first, let us translate.

1. Click **Translate**  on the toolbar. Now click **View**  again.
2. In the Contents pane, select **Abstract** and click **Edit Template**  on the toolbar.


The Preview window immediately displays the TOC. Pass your cursor over the window and you will see tooltips—popup text that identifies each element name. This makes it easy to edit elements and track your changes as you make them. The Edit Template dialog box also offers the advantage of allowing you to move easily between the four property sheets (**Element Setup**, etc.).

As you will remember from Lesson 1, Title and Intro are the two elements we are working with here. Note, in particular, how Title—“Page Navigation” is the first one in the TOC—displays onscreen.

3. Click **Globals**  and then **Options** to open that tab dialog. Incidentally, this tab dialog contains additional options when you are editing a body page template.
4. Select the **Allow CSS character and paragraph formatting** check box.
5. Click **OK** to return to the Edit Template dialog box, and then **OK** again to return to the main window.

6. Select one of the source documents (and thus the second template in the publication) and once again turn on CSS in **Globals**.

Format the TOC

1. Select **Abstract** in the Contents pane and click **Edit Template**  on the toolbar.
2. Click the **Formatting** button to open that tab dialog. The Character tab dialog is open by default. From the Elements list, select **Title**.
3. Under Font Name, choose the font you want to use from the drop-down list. Remember: the fonts you see here are the ones on your system. If you choose a font not available on the user's system, the browser will substitute another. For our purposes, select a strong font, such as **Arial Black**, if you have it. (But if you do, you might want to return to the Effects dialog box and change the Bold setting to **From source**.)
4. Under Font Size, click **Use this size**. Now check the options available from the drop-down list. There are more options here when CSS is turned on.
The first seven relate to the standard HTML heading tags (including H1 through H6). Since these sizes are set by your browser, you cannot control them. The Larger and Smaller choices simply let you choose a new size relative to the existing font size. Custom provides the most flexibility. With custom you can specify the exact size you want to use in points, inches or centimeters. You can also pick the Percent option to resize the font as a percentage of its existing size.
5. From the drop-down list, choose **Custom**. In the first box below, select the default 10.00 point size and type **12**. (The default unit of measure—the second drop-down box—is points.)
6. Under Font Color, click the **Color** button to open the Color dialog box and select red. Then click **OK**.
7. Now select **Intro** from the Elements list.
At this stage, you have not saved changes you have made for Title. But you will be fine as long as you click OK when you are finally done formatting all the elements.
8. Select **Arial** (which is compatible with Arial Black), and set this font to 8 points. (You can get away with setting a sans serif font like Arial to 8 points, but for some other fonts this size might be too small.)
9. Switch to the Paragraph tab dialog, and under Indentation for the Left Side, select **Set to** and accept the default setting of **12** points.
10. Click **OK** to return to the Edit Template dialog box to preview your changes.
11. Click **OK** to go back to main window, and then click **Translate** and **View**. (See Figure 6-2.)

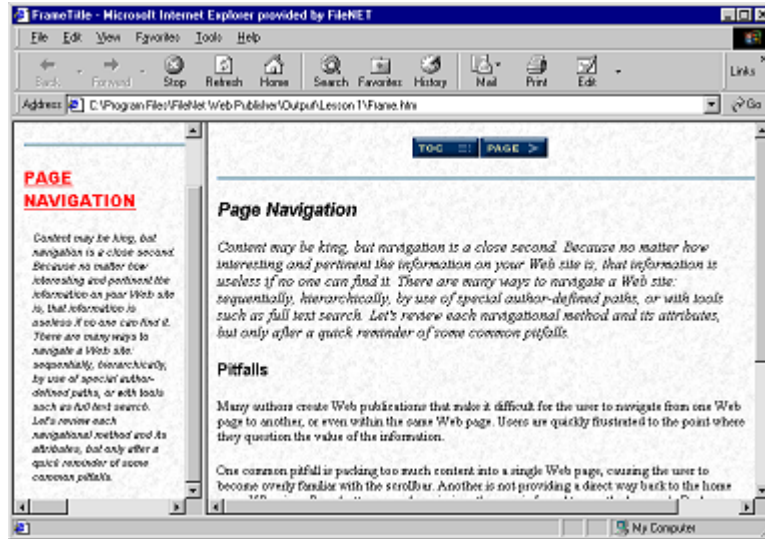


Figure 6-2 Your web publication with a few changes made to the TOC with CSS turned on.

Format the body pages

One of the tricks to creating a good web publication is to be consistent in the styling of all the frames in a frameset. Document Publisher Station encourages this, for example, by associating the same graphics Set with related templates (thus, Blue Bevel is associated with the templates Business, Business TOC, and Business Index).

However, when you move away from the template settings themselves (or start with the default or Blank template), you need to give careful thought as to how to handle content. That is not to say that everything should end up looking the same (in some instances, you may even be seeking contrast rather than consistency). But you should avoid, for example, using too many different fonts or colors. In fact, you can achieve a surprising amount by the judicious use of text options, using those available with CSS turned on.

Take another look at your publication in your browser. Let us do a couple of things in the main frame that will be compatible with the TOC. One thing might be to key Title text the same color and in a similar font.

1. Select one of the source documents (and thus the Business template) and click

Edit Template  on the toolbar.

We are still dealing with the elements Title and Intro, of course (you can pass your cursor over the Preview window in the Edit Template dialog box to confirm), but this time for the body pages.

2. Click **Formatting**. Select **Title** and apply a new font, size, and color to the element, just as you did for Title in the Abstract template.

You might choose Arial Black again, but this time set it larger (say, 14 points). You might also choose the color red, so that the title will be tied visually to the same text in the TOC. Finally, you might turn off italic, which is used in the source document. (In the Effects dialog box, select **Always Off** from the Italic drop-down list.)

3. Format the **Intro** element also, making it Arial and 9 point (thus slightly larger than for the same text in the TOC).
4. Click **OK** to return to the Edit Template dialog box (you will see your changes in the Preview window). Click **OK**, again, to return to the main window.
5. Translate and view your revised web publication. This is just a simple example of relating TOC content to the body pages.

Tips

1. CSS is template-based. You can turn on the CSS option for all templates in your publication, some, or none at all. Those templates with “CSS” as part of their name already have CSS turned on.
2. Keep in mind the need for a compatible look between frames. The more frames you have in your frameset, the greater the need to control the number of fonts you use.
3. The Edit Template dialog box lets you preview your changes as you make them. It also facilitates editing, thanks to tooltips in the Preview window that identify element names. Finally, it simplifies the process of moving between the different property sheets (**Element Setup**, etc.).
4. Remember: implementing CSS is not always predictable. You may get different results, depending on which browser you are using. Moreover, whichever browser you do use, what you see onscreen in your browser may be different from what you print out.

LESSON 3

Formatting tables

Source documents often contain tables. With Document Publisher Station's wide range of formatting options, you can not only format the *content* of tables in special ways, but also format their *appearance*.

Ideally, to format content, you should use unique styles in the source documents. In that case, you simply select the appropriate elements from the Elements list in **Formatting** and format those elements, using options in the Character and Paragraph tab dialogs. However, if the same styles have been used for table content as for other content in the source documents, you can still format table content differently from the rest of the document by using the Table Overrides feature.


To format the appearance of a table, you use the Tables tab dialog in **Formatting**. To do so, however, *you must select the element for the content immediately before the table*. This is necessary because, while the content of a table can have its own styles, the table itself does not have a style. So Document Publisher Station identifies a table by using the style immediately preceding the table.

While this may seem confusing at first, it actually increases the options available to you for the treatment of tables in your web pages. Among the formatting options for table appearance are changing table borders, altering table cell size, and changing the color of cell background.

In this lesson, you will

- Format the appearance of a table
- Format the content of a table, using both a unique element and the Table Overrides feature

Format the appearance of a table

1. Open **Tables.tcp** in the `..\FileNet Document Publisher\Samples\en` subdirectory.
2. In the Contents pane, select **Other Issues.doc** and click **Formatting**  on the standard toolbar.
3. From the Elements list, select **Caption** and switch to the Tables tab dialog. Caption is the style for the content that immediately precedes the table in the source document.
4. Under Appearance, click the **Alignment** button.
5. Under Table Horizontal, click **Use this alignment**, and select **Center** from the drop-down list. Note how the sample table in the Preview box has changed.

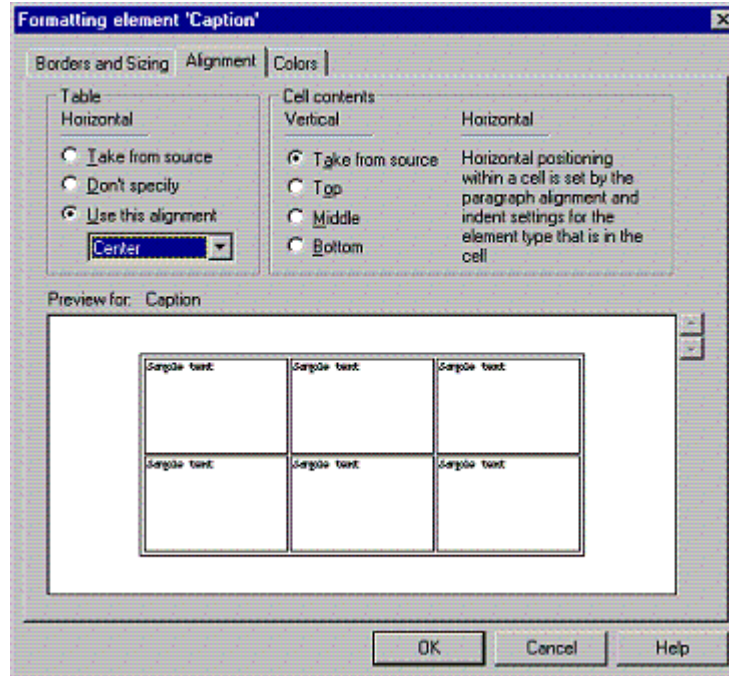


Figure 7-1 The Alignment tab dialog for formatting the appearance of tables.

6. Switch to the Colors tab dialog. Under Table Border, click **Use this color**, and then click the **Color** button to open the Colors tab dialog. Pick a dark blue and click **OK** to return to the Colors tab dialog in Tables. Note how the sample table in the Preview box has changed again.
7. Click **OK** to return to the Tables tab dialog.

Now you will format table content. The table in Other Issues.doc contains two styles: TableHead is used only in the table, whereas Normal is used elsewhere in the document.

Format the content of a table

1. From the Elements list, select **TableHead** and switch to the Character tab dialog.
2. Under Font Color, click **Use this color**, and then click the **Color** button to open the Color dialog box. Pick a red and click **OK** to return to the Character tab dialog.
3. Switch to the Paragraph tab dialog. Under alignment, click **Use this alignment** and select **Center** from the drop-down list.




You have formatted TableHead. This formatting will affect only the heading text of the table. To format Normal, however, you will have to use Table Overrides because this element is found elsewhere in the source document.

Format content by using Table Overrides

1. From the Elements list, select **Normal** and switch to the Character tab dialog.
2. Under Tables Overrides, click **Override when a table** and then click the **Character** button.



Figure 7-2 Using Table Overrides to format the Normal element.

3. Under Font Color, click **Use this color** and click the **Color** button. In the Color dialog box, pick a dark green, and then click **OK** to return to the Character tab dialog.
4. Click **OK** to return to the main window.
You have saved all your changes to the template. You must now save them to the project file.
5. Click **Save**  on the toolbar.
6. Click **Translate**  on the toolbar to translate your publication.
7. In the Contents pane, select **Other Issues.doc** and click **View**  on the standard toolbar to view your web page. See Figure 7-3.

Scroll to the table. The table border is dark blue, the TableHead text is red and centered, and the Normal text in the table is dark green. But the rest of the Normal text in the web page is still black. (The text in the Web site column of the table is a different color because it is linked. The colors for links are set in the Colors tab dialog of the **Globals** property sheet.)

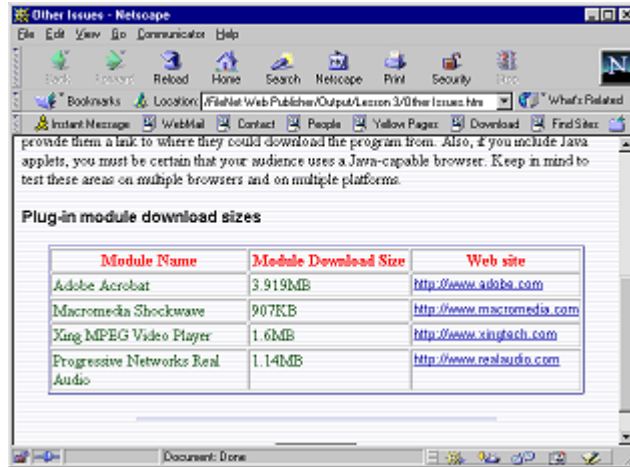


Figure 7-3 By using Table Overrides, it was possible to format the text within the table differently from the body text in the document.

Tips

1. Table Overrides is one example of being able to turn off a formatting feature in a specific context. As another example, on the Separators tab dialog you can choose to omit the separators when an element is within a table.
2. As you discovered in this lesson, in order to format the appearance of a table, you must select the element that immediately precedes the table. But if the styles preceding your tables vary, and you want to format all your tables the same way, the solution is simple. Since you can format multiple elements simultaneously, you only have to complete settings in the Tables tab dialog once. Simply identify the appropriate styles in your source documents, and then select the elements for all of those styles from the Elements list before using the Table tab dialog.
3. If a table is at the very top of a source document, with no content preceding it, the element Default Paragraph is associated with the table and can be used to format its appearance.

LESSON 4

Formatting bulleted lists

Lists pose a special challenge when you are creating web pages. Web browsers interpret the list tag by placing either bullets or numbers before list items. This can cause a “doubling up” effect in web pages. To avoid this, Document Publisher Station does not automatically assign the list tag when it imports styles or patterns. As a result, bullets or numbers “pass through” during translation without this effect.

For best results in formatting lists, each list type should have its own unique style and you should assign the list tag to the element that Document Publisher Station generates from that style. If the lists in your source documents do not have unique styles, you can still use Document Publisher Station’s pattern matching capabilities to search for bulleted or numbered text and assign an element to that pattern. This will be necessary, for example, if you have used the AutoFormat feature in your word processor to create bulleted lists.

In this lesson, you will

- Create a pattern to search for a bulleted list
- Format a bulleted list


In Lesson 5, you will learn how to handle numbered lists.

1. Open **Lists.tcp** in the ..\FileNet Document Publisher\Samples\en subdirectory.
2. In the Contents pane, select **Publishing Process.doc**, and click **Edit**

Template  on the toolbar. (Publishing Process.doc contains the bulleted list you will format in this lesson.)

In the Preview window, scroll to the bulleted list at the end of the document. (If the Auto check box is clear, either select the box or click the Update Now button.) This list was added by using the Bullets feature in Word, and is currently part of the Normal style. Note how small the bullets are. This is a common problem with lists in web pages.

Create a pattern to search for a bulleted list

1. Click **Element Setup** .
2. Switch to the Patterns tab dialog, and then click **New** to open the New Pattern dialog box.

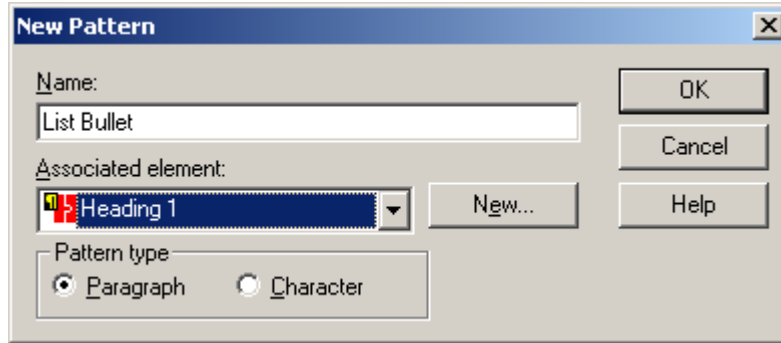


Figure 8-1 The New Pattern dialog box with the new pattern named and associated with a new element.

3. In the Name text box, type **List Bullet** (see Figure 8-1)
4. Click the **New** button next to the Associated Element drop-down list to open the **New Element** dialog box (Figure 8-2).
5. In the Name text box, type **List Bullet**, and select **** from the drop-down list of HTML tags. Then click **OK** to return to the New Pattern dialog box.

When you associate the tag with an element, this tells the browser that the following text is a list. The formatting for a list is different than the formatting of the body text. So you need to assign this tag to any element associated with a list.

6. List Bullet now appears in the Associated Element text box. Click **OK** to return to the Pattern tab dialog.

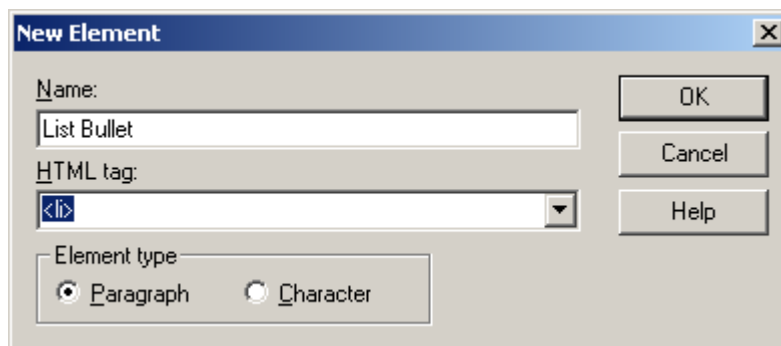


Figure 8-2 The New Element dialog box, where you create new elements.

7. From the Patterns list, select **List Bullet** and click **Properties**.
8. Click **Text Expression** to open that tab dialog.
9. Under Text Paragraph Position, select **Beginning**, and in the Text Expression text box place the cursor between the quotation marks.
10. Under Common Character Definitions, click, in turn, the **Bullet** button, the **Tab** button, and the **Any Character** button.

Your pattern in the Text Expression text box should look the same as the one in Figure 8-3.

11. Click **OK** to return to the Patterns tab dialog, and **OK** again to return to the Edit Template dialog box.

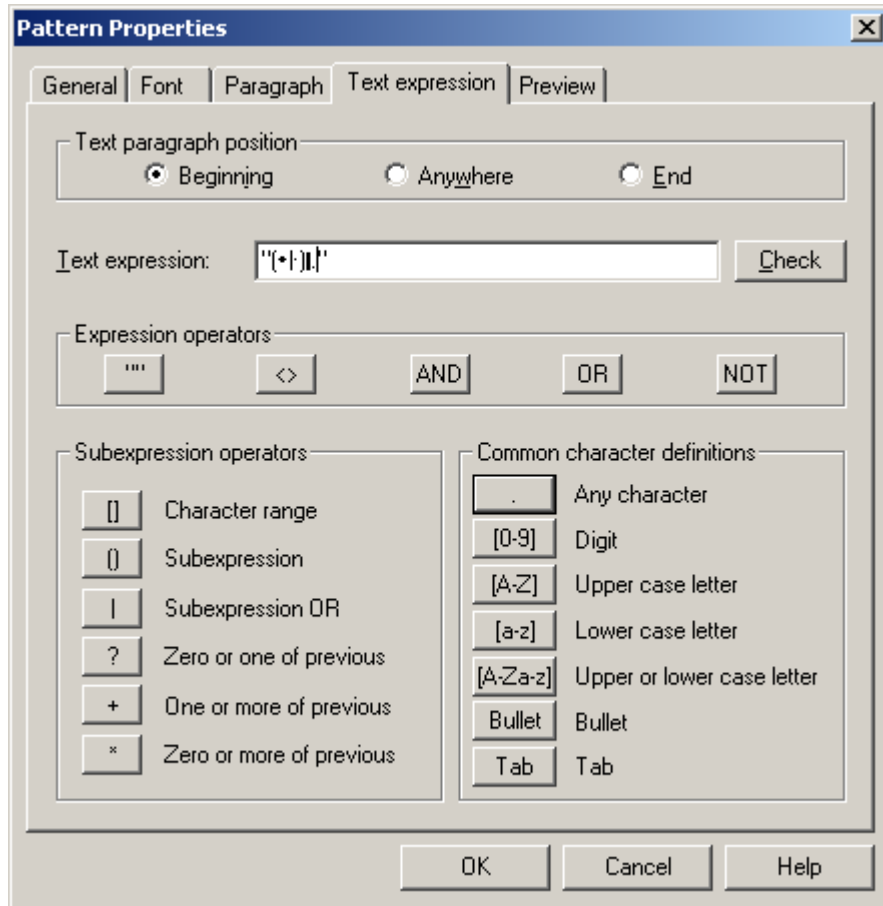


Figure 8-3 The Text Expression dialog box, with a pattern created for a bulleted list.

Document Publisher Station has now updated your web page in the Preview window. (If Auto is not checked, click the Update Now button.) Scroll to the end of the document and you will see that a second set of bullets has been added to the list, to create a “doubling up” effect. That is because you used the tag for the new pattern. You can now format the pattern to change the new bullets and strip out the old ones.

Format the bulleted list

1. Click **Formatting**.
2. From the Elements list, select **List Bullet**.
3. Click **Lists** to open that tab dialog.

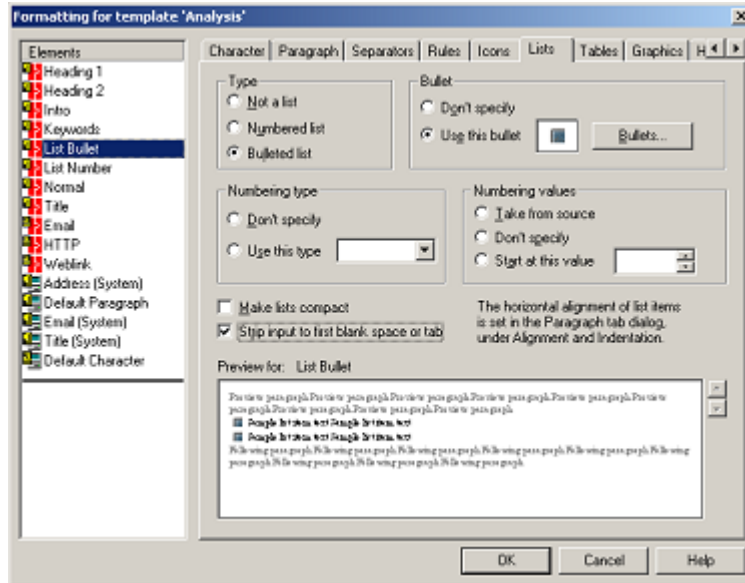


Figure 8-4 The Lists tab dialog in Formatting, where you format lists.

4. Under Type, select **Bulleted List**.
5. Under Bullet, click the **Bullets** button.
6. In the List Bullets dialog, select **Use custom bullet**.

As a graphics Set has already been associated with the template, the path and file name for the bullet from that Set displays immediately in the File Name text box.

7. Click **OK** to return to the Lists tab dialog. The bullet from the graphics Set now displays in the Sample box in the Bullet panel, as well as in the Preview box.
8. Click **Strip input to first blank space or tab**. (Note the change in the Preview box.)
9. Click **OK** to return to the Edit Template dialog box.

Scroll to the end of the document and you will see that new bullets have been added to the list and the old ones have been stripped out.

With Lists.tcp still open, you can go straight to the next lesson, on numbered lists.

LESSON 5

Formatting numbered lists

As we noted in the previous lesson, lists pose a special challenge when you are creating web pages. As with bulleted lists, best results are obtained in formatting numbered lists by using unique styles for the list content and assigning the list tag to the elements that Document Publisher Station generates from those styles.

The numbered list you will format in this lesson is easier to deal with because it already has a unique style associated with it. But the list tag has not been assigned, and the list has “mixed styles.” That is, in addition to the style used for each numbered item (List Number), a second style (Indent) has been used for the second paragraph that follows some of the items.

A common problem with mixed styles is that browsers often interpret each number after the second style as being the start of a new list, and so start renumbering the list. Fortunately, Document Publisher Station has a way around this.

In this lesson, you will

- Change the HTML tag assigned to an element
- Format a numbered list

You should have **Lists.tcp** still open and Publishing Process.doc displayed in the Edit Template dialog box.


1. Under Preview, click the **Change Preview** button to open that dialog box.
2. From the list of source documents, double-click **User Interface.doc**.

The Preview window in the Edit Template dialog box now updates to display the second document in the publication, User Interface.doc.

3. Scroll to the numbered list near the end of the document.

To format this list, you need to assign the tag to the element associated with it. You did this already for the Bulleted list, when you created the new element.

Change the HTML tag assigned to an element

1. Click **Element Setup**  on the toolbar.
2. From the Element list, select **List Number**, and click **Properties**. (List Number is the style used for the list items.)
3. Click **HTML Tag** to open that tab dialog (see Figure 9-1).
4. Click **Use standard tags**, and select from the Tag drop-down list.
5. Click **OK** to return to **Element Setup**, and **OK** again to return to the Edit Template dialog box.

In the Preview window, scroll to the list, which now has bullets in addition to numbers. This happened when you assigned the list tag to List Number. So let us format List Number to eliminate this problem.

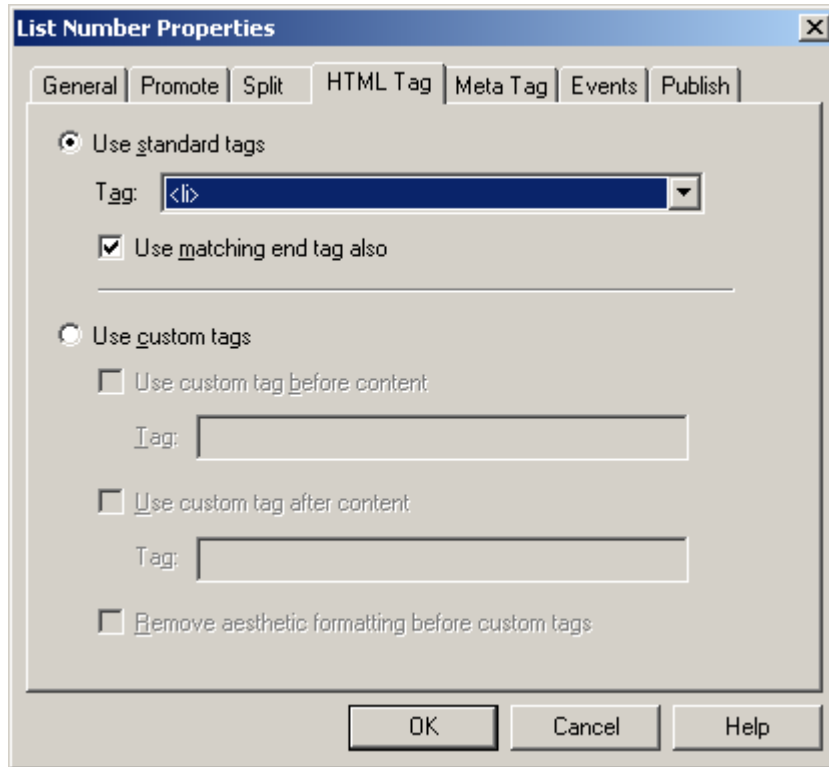


Figure 9-1 The HTML Tag tab dialog in Element Properties, where you can change the HTML tag assigned to an element.

Format the numbered list

1. Click **Formatting** to return to that property sheet.
2. From the Elements list, select **List Number**.
3. Click **Lists** to open that tab dialog (see Figure 9-2).
4. Under Type, select **Numbered List**.
5. Under Numbering Type, accept the default, and under Numbering Values, select **Take from source**. This option ensures that the list will retain its original numbering when Document Publisher Station translates the source document. (Because of a browser limitation, this option works only for the numbering type 1, 2, 3....)

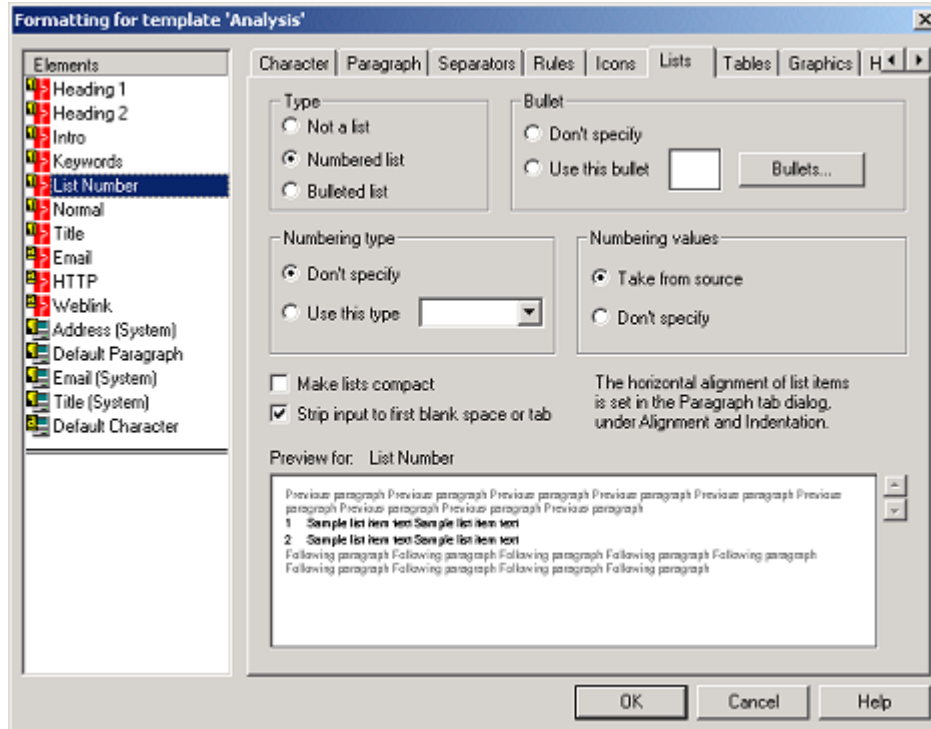





Figure 9-2 This tab dialog is where you apply formatting to lists.

6. Click **Strip input to first blank space or tab** (note the change in the Preview box).
7. Click **OK** to return to the Edit Template dialog box, and **OK** again to return to the main window.
8. Click **Save**  on the toolbar to save the project file and all your template changes.
9. Click **Translate**  on the large toolbar.
10. In the Contents pane, click **View**  to view your web page.

You do not need to select one of the output pages. Since the publication does not have a frame, Document Publisher Station will open the first output page listed. (The two documents are linked by navigation buttons, so it does not matter which page you open first to view your web publication.)

Navigate between the two pages (navigation buttons are at the top and bottom of each page), to see how the two lists appear now. Publishing Process contains the bulleted list, while User Interface contains the numbered list.

Tips

1. When you format a list, the list ideally should have its own style. You can always “pass through” lists, because Document Publisher Station does not automatically apply the list tag to lists. But this limits your formatting options.

2. If a list does not have a unique style, it is relatively easy to create a pattern to find the list content, especially if the list begins with a bullet or number followed by a tab. If the bullets used are not part of the style used for the list, but are from another font (say, Symbol), you may need to search for any character, followed by a tab, or choose to search for that font. What matters is that you create a pattern unique to the list so that Document Publisher Station can search for that pattern to format the list.
3. Another issue is what happens when you have “mixed styles.” If you have a numbered style followed by an unnumbered style, as in Publishing Process (where the List Number style was followed by Indent), the browser will begin numbering over again each time there is a break in the list, that is, immediately after the second style (Indent, in our example). By selecting Take from Source, you told Document Publisher Station to keep the same numbers as in the source file.

LESSON 6

Working with graphics

Graphics are an integral part of most web pages. A complicated page with many graphics may take a long time to download and may even drive readers away, while a web page without graphics may seem dull. So the trick is to achieve a judicious balance between graphics and the other content. In creating web pages, you can add navigation and other visual aids to assist readers. But the treatment of graphics begins with how you handle those graphics already in your source documents.

Document Publisher Station converts graphics into the GIF, JPEG, PNG, or BMP format (the WBMP format is available for WML projects). If they are in one of those formats already, and they are externally linked in the source documents, they are simply “passed through” unchanged. If they are embedded in the source documents, the graphics are converted according to the settings in the Graphics tab dialog in **Formatting** (the default is GIF for an HTML project, WBMP for a WML project). Like most content in Document Publisher Station, you format a graphic by selecting the element associated with the graphic. So if you have several graphics associated with different elements, you must format each element, in turn.

On the other hand, by using unique elements for different graphics, you can format the graphics individually. Even if your source document is manually formatted, you can create a pattern to identify paragraphs that contain the graphics and use that pattern for formatting purposes.


In this lesson, you will

- Convert a graphic into a GIF and make a color in that graphic transparent
- Convert a second graphic into a JPEG and create a thumbnail for it

The source document for this lesson contains two bitmaps. The first is embedded in the text and associated with the Normal style. The second is linked to the document and has its own unique style, Screen Shot.

Convert a graphic into a GIF and make a color transparent

1. Open **Graphics.tcp** in the ..\FileNet Document Publisher\Samples\en subdirectory.

2. In the Contents pane, select **Other Issues.doc** and click **Edit Template** .

In the Preview window, click the Next Page button and use the scrollbar to move through the content. Note the embedded graphic “New” on one page. The letters are white on a yellowish background, and the graphic sits on the baseline of the text. On another page, the second graphic—a screenshot—is full-size.

3. Click the **Formatting** button to open that property sheet.
4. From the Elements list, select **Normal** (the style associated with the embedded graphic) and switch to the Graphics tab dialog. You can use the arrow button at the upper right to display more tabs.

5. Under Format, accept the default GIF. The graphic associated with the Normal style will be converted into a GIF.
6. Click **Make this color transparent**. Then click the **Color** button and in the Color dialog box select white. Click **OK** to return to the Graphics tab dialog.
7. Under Alignment, select **Top**.

Since this graphic is embedded in the text, it is important to set its relationship to the text. Top aligns the top of the graphic with the line of text, Middle aligns the middle of the graphic with the line of the text, and Bottom aligns the bottom of the graphic with the line of text.

Left Text Edge and Right Text Edge will align the graphic to either the left or the right of the column, with the text alongside. Center will place the graphic in the center of the page on a line by itself.



8. Click **OK** to return to the Edit Template dialog box. View the graphic you have just edited. Note how its position has changed—the top of the graphic now aligns with the cap height of the text—and the white lettering has become transparent to allow the background color of the graphic to show through.

Convert a graphic into a JPEG and make it a thumbnail

1. Click **Formatting** again to open that property sheet.
2. From the Elements list, select **Screen Shot** (see Figure 10-1).
3. Under Format, click **JPEG**.
4. Under Alignment, accept the default, **None**. Since this graphic is on a line by itself, alignment does not matter.
5. Click **Create a link to the graphic** and **Link using thumbnail**. Then click **Thumbnail Size** to open that dialog box, and select **1/16 full graphic** from the drop-down list. Click **OK**.

The graphic associated with the Screen Shot element will now be converted into a JPEG and will display as a thumbnail (with a link to the full-size graphic.)

6. Click **OK** to return to the Edit Template dialog box. Check the new thumbnail graphic in the Preview window. Then click **OK** to return to the main window.

7. Click **Save**  on the toolbar to save the project file and the template, and then click **Translate** .

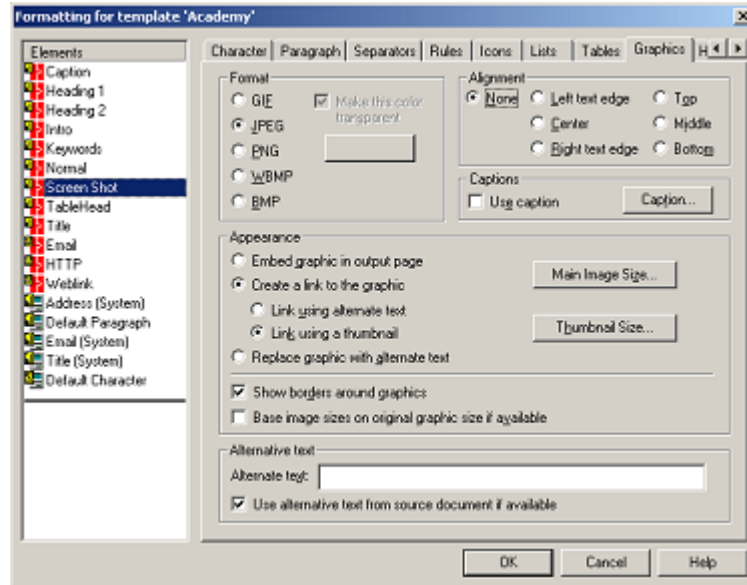


Figure 10-1 The Graphics tab dialog in Formatting.

8. Select **Other Issues** and click **View**  to view the web page you have just created (see Figure 10-2).

When you view the web page you will see that the first graphic (associated with the Normal element) has not changed this time. But the large screen shot (associated with the Screen Shot element) is now a JPEG and is linked to a thumbnail. When you click the thumbnail, the graphic displays full size in the browser window by itself (you can click Back to return to the web page).

By turning the large graphic into a thumbnail, you have improved the download time of the page. Also, thumbnails take up less screen space. There is not much difference when you have just one, but with many graphics, it can make a big difference.

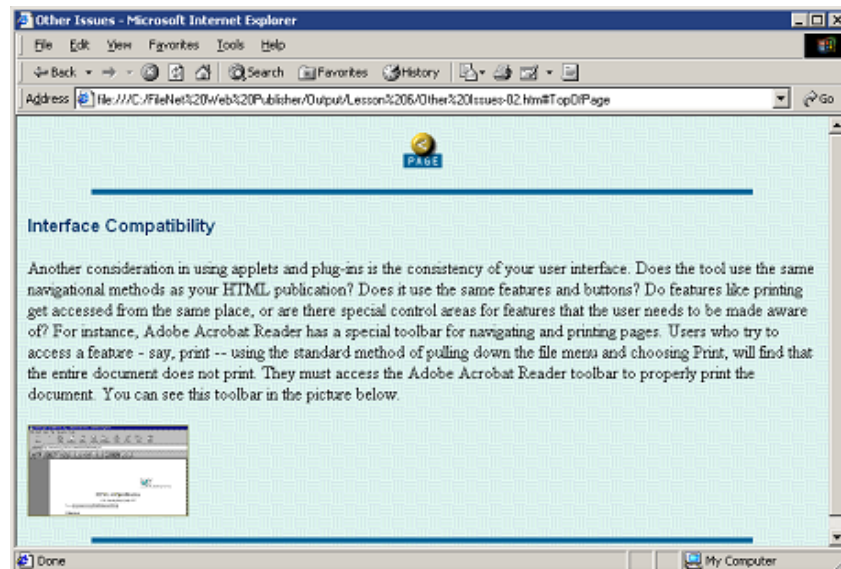


Figure 10-2 The second graphic seen as a thumbnail in the browser.

Tips

1. You have the choice of linking or embedding your graphics. When you link a graphic, text or a thumbnail will display on the page. The reader will need to click the link to see the full-size graphic. If you embed the graphic, the graphic will display full-size. In both cases, Document Publisher Station creates a separate file for the graphic and saves it to the Graphics output directory. The difference is how the graphic displays in the browser.
2. While a number of different graphics formats are used on the Web, GIF and JPEG are the most common. The different formats work best for different graphic types. GIF is best for graphics such as bar charts and line drawings that have large blocks of flat colors, with consistent color and no shades. JPEG was developed specially for photographs and therefore is best for graphics with variations in colors and lots of shading. PNG is a GIF alternative that offers better compression and more transparency options. BMP is now supported by more browsers. WBMP is best for use with WML projects.
3. Thumbnails are always GIFs, no matter which option you choose for converting fullsize graphics.

LESSON 7

Introducing navigation

Navigation can take many forms. In this lesson, we will look at text bars and button bars, both of which can play an important role in helping the user navigate a web publication.

Both text and button bars can be placed at the top or bottom of a page (or both), as well as associated with elements on a page. Text bars draw their content from elements in the template and are used to navigate specifically to that content. Button bars perform a more general role, typically allowing users to move back and forward through a publication, or to link to other means of navigation, such as a TOC or Index.


Document Publisher Station has added a Top of Project button to the traditional repertoire of navigation buttons. With this button, the user can return to the top page of a web publication from anywhere in it. This button can be especially useful in a highly complex web publication.

Document Publisher Station also boosts the power of navigation button bars by allowing links beyond the web publication itself. Three “specific page” links are available to connect to any URL anywhere. In addition, a Link to Source button can allow you to place a link in a web page that will open, in its native format, the source document that was used to create the web page. Finally, a special Print button can be inserted anywhere in your publication to let the user print all or select portions of the publication at any time.

In this lesson, you will

- Create a page text bar
- Add Link to Source and Print navigation buttons
- Change the layout of the page and text bars at the top of the page

Create a page text bar

1. Open **Textbars.tcp** in the `..\FileNet Document Publisher\Samples\en` subdirectory.
2. Select one of the source documents and click **Navigation**  on the toolbar. As you are editing the template, not the source documents, it does not matter which source document you choose.

First, in the Page Button Bar tab dialog, take a quick look at the default buttons set for the Executive template. As you can see, four are set both at the top and bottom of each page, while the Top of Page button is set at the bottom only. These buttons are from the Gray Tab graphics Set, which is associated with the Executive template.

3. Click **Page Text Bar** to open that tab dialog (see Figure 11-1).
4. Click **Build a text bar from all** and select **Title** from the drop-down list. Accept the default **(2)** from the **Using the first** drop-down list. (This means the text bar will be created from the first two words of each Title.)

5. Make sure that the **Strip input to first blank space or tab** check box is clear.
If your titles include chapter numbers (like the titles of these lessons), this option will remove them. If they do not include numbers, you should clear this check box to avoid losing the first word of each title.
6. Under Placement, select **Top of page** and **Bottom of page**. Under Alignment, accept the default, **Center**.
7. Under Font, click **Use this font** and select **Arial** or another sans serif font from the drop-down list. (The fonts available will be those on your machine.)
8. Click **Use this size**. Accept the default **Absolute** and select **2** from the drop-down list.
9. Click the **Bold** check box.

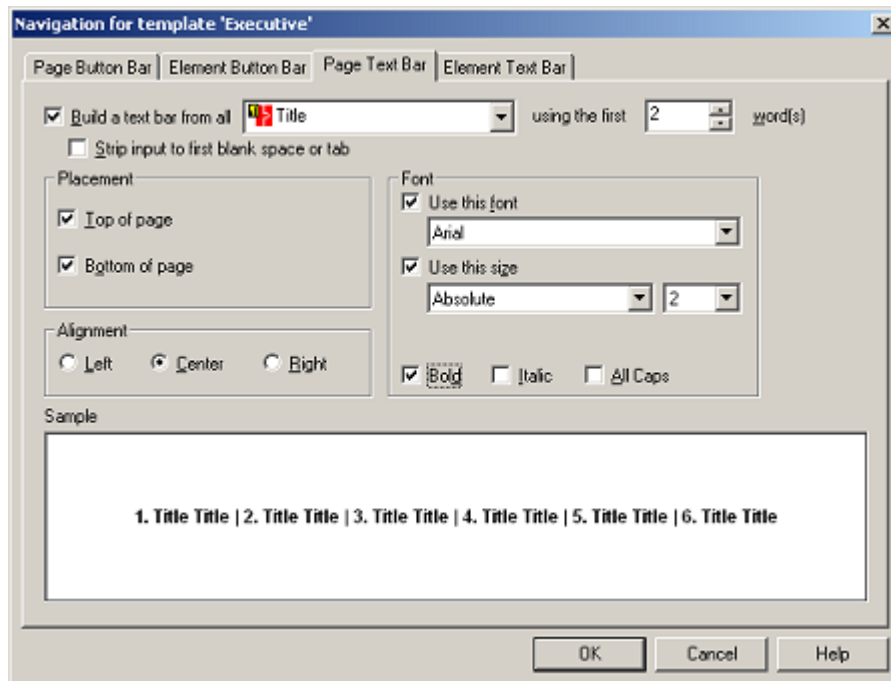





Figure 11-1 The Page Text Bar tab dialog. With CSS turned on (as shown here), options in the Font panel will let you format text bars more precisely.

You have just created a page text bar that will display the titles of all four documents in this publication. You can use these text bars to navigate between pages. Let us take a look at the result.

1. Click **OK** to return to the main window and click **Save** .
2. Click **Translate** .
3. Click anywhere in the Contents pane below the list of files to ensure that no file is selected, and then click **View** .

Note what has happened. First, with no output page selected in the Contents pane, the browser opened the first page listed—Publishing Process (see Figure 11-2).

Second, the page text bar appears near the top of the web page, just as you formatted it and with links to all four pages. (By the way, the default colors for these links are as set in the template, on the Colors tab dialog in **Globals**.) By clicking an

entry in the page text bar, you can jump from page to page. (When you jump from one page to the next, you jump to the actual link, that is, to the page title. You then need to scroll to the top or bottom of the page to access the page text bar on that page.)

Third, the browser displays only those navigation buttons essential to navigate the publication. Although TOC and Index buttons are default settings for the Executive template (as you will recall from the Page Button Bar tab dialog), these have dropped out because the publication does not contain a TOC or an Index.

The Previous Page button is still in the publication, but it is not required for the first page. It will appear as soon as you click Next to move to the next page in the publication (Page Navigation). Finally, if you scroll down to the bottom of the page, you will see the Top of Page button, which is also a default setting for the Executive template.

Add Link to Source and Print buttons

1. In the Contents pane, select one of the source documents and click **Navigation** again.
2. In the Page Button Bar tab dialog, under Link Type, select **Link to Source** and double-click in the Before column opposite the link.

The “Get Source” button appears immediately in the Top of Page preview window and the path and file name for the graphic appear in the Link Icon column. (This button is from the Gray Tab graphics Set.)

3. Now select **Print** in the Link Type column and again double-click in the Before column.

This time the Print button appears in the Top of Page preview window and the path and file name for this graphic appear in the Link Icon column.

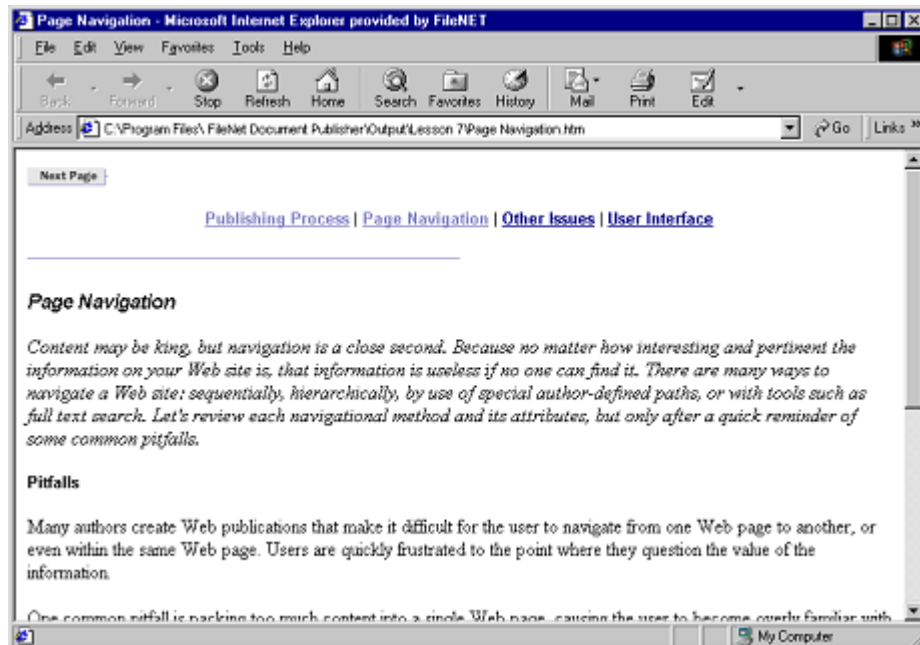


Figure 11-2 The browser with the new page text bar. The page button bar has more buttons set in the template, but only buttons essential to navigation display on each web page.

4. If necessary, use drag-and-drop to move both the Print and Get Source buttons in the Top of Page preview window so that the buttons are aligned as shown in Figure 11-3. (Where possible, it is helpful if specific buttons appear in the same order in button bars at both the top and bottom of a page.)
5. Click **OK** to save your changes to the template and return to the main window.

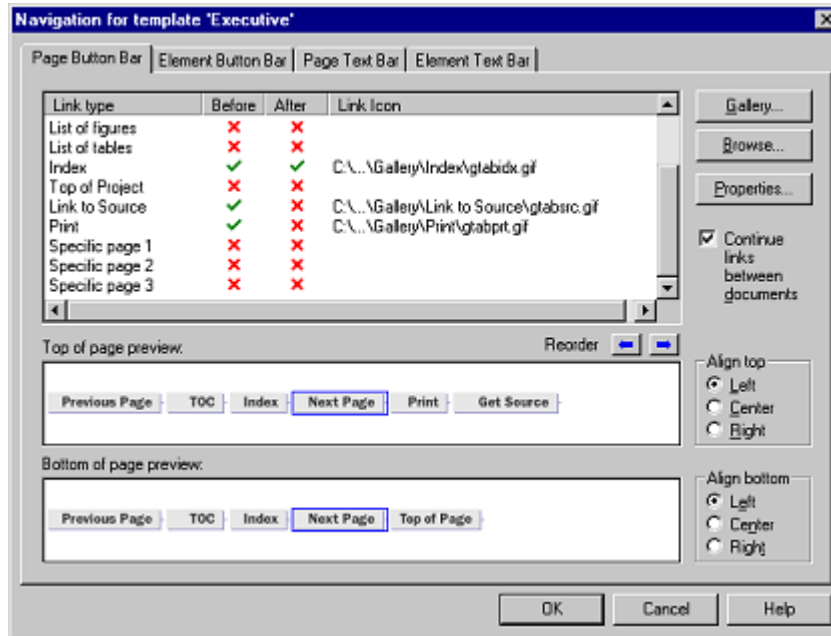





Figure 11-3 The Page Button Bar with Link to Source and Print buttons added and rearranged in the button bar in the Top of Page preview.

Change the layout of the navigation bars at the top of the page

Let us complete one last task before we view the results.

1. With one of the source documents selected in the Contents pane, click **Globals** to open that property sheet and then click **Layout** to open that tab dialog. (You may need to click the right arrow button at the upper right of the property sheet to reveal the Layout tab.)
2. In the Layout tab dialog, grab “Text Bar” with the mouse and drag it above the three red button arrows that represent the page button bar.
3. Click **OK** to return to the main window.
4. Click **Save**  and then **Translate** .
5. Click **View** . Figure 11-4 shows the final version, with the Print and Get Source (Link to Source) buttons added and the page text bar now at the top of the page (compare with the browser view shown in Figure 11-2).
6. Click the **Print** button. If you are using Internet Explorer, the Select Files to Print dialog box opens. You can select any combination of pages you want to print. (See Tip 5.)

- Click the **Get Source** (Link to Source) button and the source document used to create the web page will open in its native format.

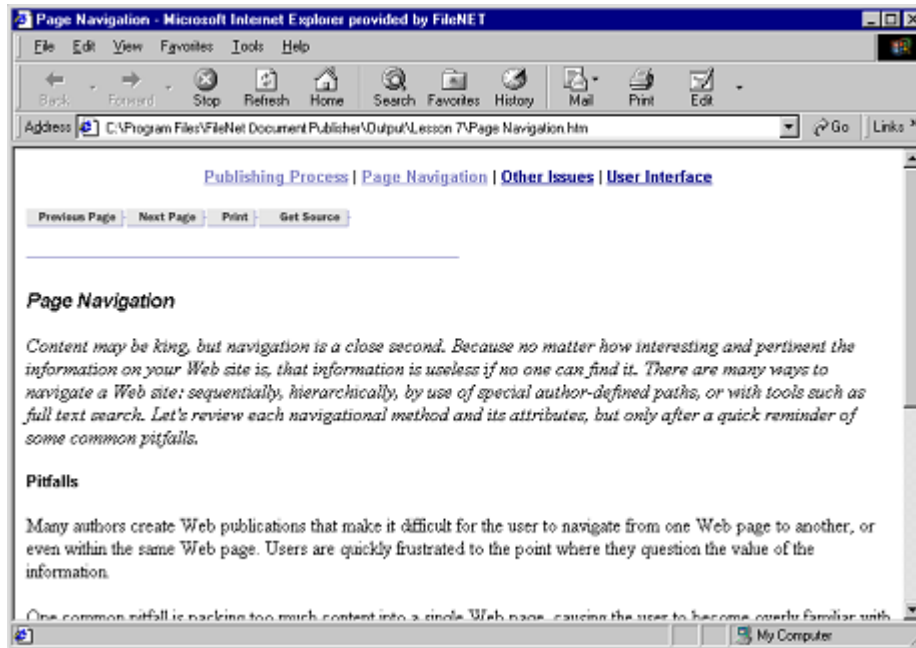


Figure 11-4 The final button and text bars. The layout of the two bars can be changed in the Layout tab dialog of Globals.

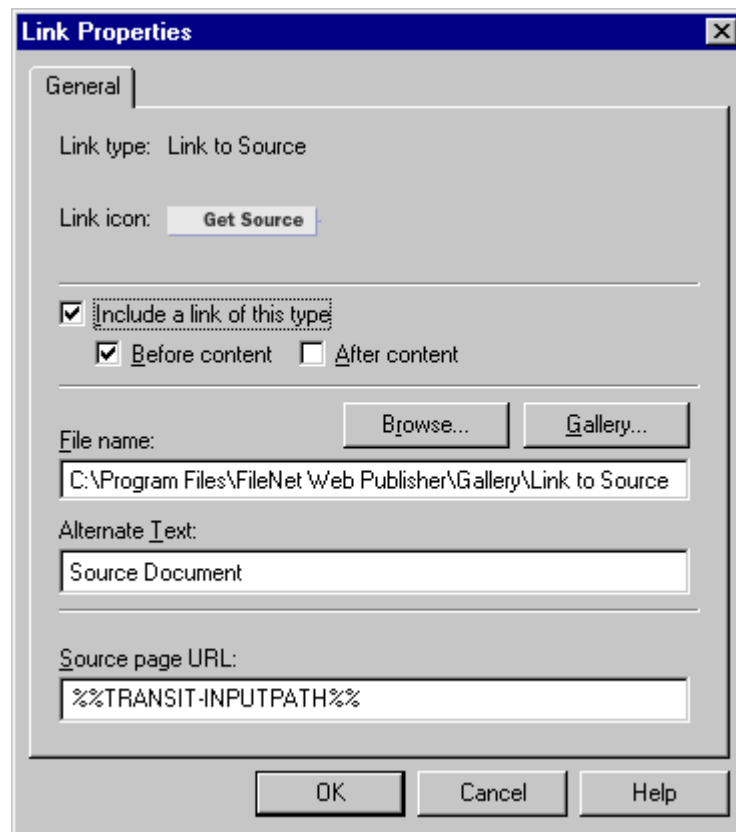
Note: Depending on which browser you are using and the native format of the source document, the document may open in your browser viewer, not the application used to create it. If so, you will still be able to edit the document, if you want, in your browser. Once you save your changes, you can then click the Back button on the browser toolbar to revert to your web publication.

Tips

- The successful use of text bars rests on the careful creation of headings in the source documents to begin with. Even if the entries in a text bar are complete (you have created the text bar by picking up all the words in each heading), you may find that some headings are less than useful when they are no longer in the immediate context of the content they are related to.
- If you view page and element text bars in the Preview window in the Edit Template dialog box, keep in mind that the Preview window can only display one source document at a time. So the text bars may not always display all possible entries for the text bar. That is, the text bars will not necessarily appear as they will in your Web browser once you translate your publication.
- If the template you are editing has cascading style sheets (CSS) turned on, your formatting options in Navigation are even greater. You will find that you can select Custom in both the Page Text Bar and Element Text Bar tab dialogs and set a precise point size in one of several units of measure.
- When setting up a project, you can actually create a page button bar with more navigation buttons than you may need right away. Document Publisher Station will display only those buttons required for navigation in a publication. The

templates that ship with Document Publisher Station typically have all the buttons you saw in Executive already preset.

5. The Print button functionality is fairly straightforward, thanks to certain default settings in Document Publisher Station. (For more information, open online Help and select the entry “print functionality, enabling” from the Index.) However, its functionality differs between Internet Explorer and Netscape Navigator. With Internet Explorer, you will be able to print all or selected portions of your publication from wherever the Print button resides on your publication. With Netscape Navigator, the Print button works the same way as the Print button on the browser toolbar. That is, it prints only the page currently displayed in the browser.
6. You may want to explore the Link Properties dialog box in Navigation. For example, in the Page Button Bar tab dialog, select Link to Source and then click Properties. The dialog will display the information shown below. Note, in particular, the default source page URL. This was fine for our purposes in this lesson. But you may need to consider alternative URLs for different web publications. Open online Help and select the entry “Optional URLs for linking to a source document” from the Index.



LESSON 8

Creating titles

Titles are an important part of a web publication. They help readers identify the structure and content of the individual web pages that make up the publication.


Source documents often have titles, which you can promote in Document Publisher Station and, for example, automatically link from a TOC. But if, say, you have legacy documents that do not have titles, or you want to impose a general title or series of titles on those documents as they will appear in your web publication, Document Publisher Station automates the process of both creating titles and placing them in your web pages.

Document Publisher Station uses four components to create a title: publication, Directory Item, source document, and (in the case of a split document) page. You can use one, any two or three, or all four of these components. And once you have created the title, you can place it at the top of each web page of your publication. You can also place the title in the title bar of the web browser (but with framesets, the title is created a different way).

In this lesson, you will

- Learn how to set up the three of the four components of a title: Publication, Document, and Page
- Place the title both in the pages of the web publication and the title bar of your web browser
- Review what happens when you use a frameset

Set up the title

1. Open **Titles.tcp** in the `..\FileNet Document Publisher\Samples\en` subdirectory.
2. In the Contents pane, select **Publishing Process.doc** and click **Globals**  on the toolbar.
3. Click **Titles** to open that tab dialog (see Figure 12-1).

There are two options under Title Placement for the placement of the title. The first will place the title in the <TITLE> tag of your HTML file. As a result, it will display in the title bar of the web browser. It will also be used in the Bookmark and past history lists, possibly even by search engines as the site identifier.

The second option places the title at the top of your web page. In this case, the title is associated with the special element Title (System). Do not confuse the elements Title and Title (System). If your template has an element Title, that is because you have a style or pattern in your source document of that name. Typically, it would represent the opening text (chapter title, say) at the beginning of the document. On the other hand, all the “system” elements are special elements created by Document Publisher Station (they come with every template). Title (System) is used specifically to format the title you create when you choose the second option under Title Placement.

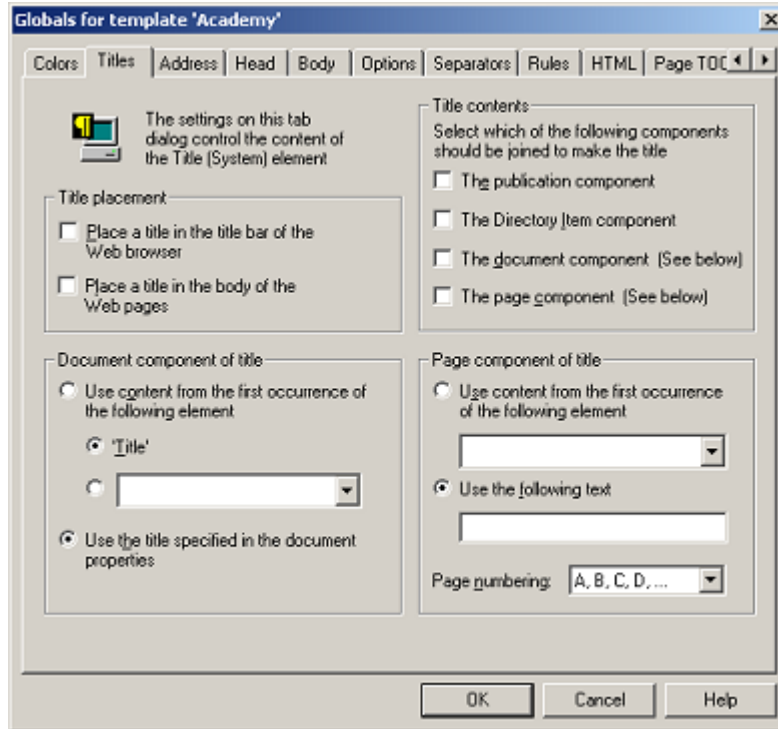


Figure 12-1 In the Titles tab dialog you determine a title's content and its placement.

4. In the Title Placement panel, check **Place a title in the body of the web pages** (see Figure 12-2).

Incidentally, this is the same as including Title (System) in the body of the document (that is, changing the red cross to a green check mark in the In Body column of the Elements tab dialog in **Element Setup**). Now you will step through the process of adding the components of the title, one by one.

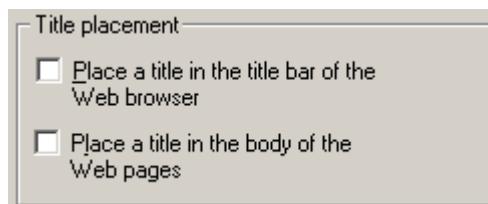


Figure 12-2 This Title Placement panel controls where the title appears.

Set the publication component of the title

The publication component is a property of the publication. The content is taken from the Publication Title entry in the Publication Properties dialog box. By default, the title is the name of the publication, but you can change it, if you want.

1. In the Title Contents panel, click **The publication component** (see Figure 12-3).
2. Click **OK** and return to the main window.
3. In the Publication Hierarchy pane, right-click **Creating titles** (the root publication) and choose **Properties** from the popup menu to open the Publication Properties dialog box.

- In the Publication Title text box, select “Creating titles” and type **Publication Component** to replace the default title. Then click **OK** to return to the main window.

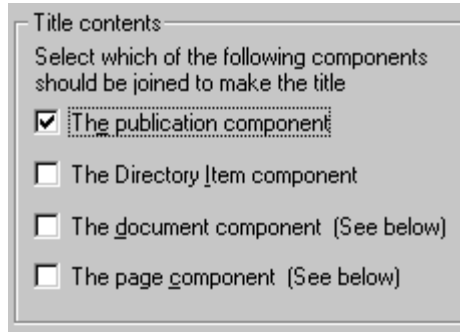


Figure 12-3 The Title Contents panel controls which components are included in the title.

- In the Contents pane, select **Publishing Process.doc** and click **Edit Template**  on the toolbar to open that dialog box.

In the Preview window, you will see the words “Publication Component” at the very top of the page. Change the preview to any other document in the publication and you will see this title on that page, too. You can use the Title (System) element to format the new title.

- Click **Formatting**. From the Elements list, select **Title (System)**.
- In the Character tab dialog, under Font Color, click the **Color** button to open the Color dialog box. Pick orange and click **OK** to return to the tab dialog, where a sample of the color now displays in the color box under Font Color (and also in the Sample box below).
- Under Font Size, change the size to **6**.
- Click **OK** to return to the Edit Template dialog box.

Since **Use this size** and **Absolute** were previously set for this template, you just need to change the size.

The title is readily apparent at the top of the page. You can see that its color and size have changed according to the template changes you have just made. This title will be the same for all the pages in the publication.

Set the document component of the title

The next step is to specify the document component. This is set under Document Component of Title in the Titles tab dialog.

- Still in the Edit Template dialog box, click **Globals** and switch to the **Titles** tab dialog.
- In the Title Contents section, click **The document component**.

In the Document Component of Title panel (see Figure 12-4), you essentially have two choices. You can use the content from one of the elements in the template to create the component. Since the Title element is an obvious choice, you can click the Title radio button in the panel. If you prefer another element, you can select it from the drop-down list of elements.

Alternatively, you can use the title specified in the Document Properties dialog box. To view any title, right-click the appropriate document in the Contents pane and choose Properties from the popup menu to open the Document Properties dialog

box. The title will be listed in the Titles text box. By default, it has the same name as the document. In this lesson, you will choose each option, in turn, starting with the element.

3. Select **Use content from the first occurrence of the following element**.
4. Select **Title**.

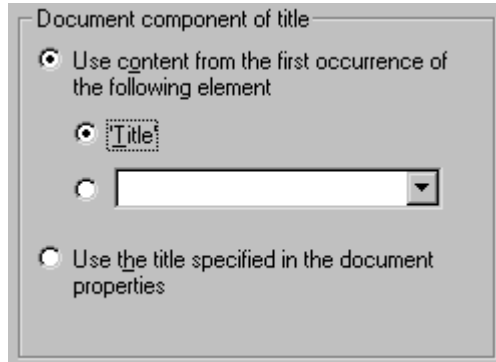


Figure 12-4 The Document Component of Title panel, where you select the document component of the title.


Document Publisher Station will now use content from the Title element for the document component of the title you are creating for the publication, and this will appear at the top of each web page immediately after the publication component.

5. Click **OK** to return to the Edit Template dialog box. The title now reads “Publication Component Publishing Process.” Of course, the document component will change as you navigate between the pages of the publication.
6. Click **OK** to return to the main window.

As mentioned, you can, instead, use the title in the Document Properties dialog box for the document component of the title. Let us try that.

1. In the Contents pane, right-click **Publishing Process.doc** and choose **Properties** from the popup menu to open the Document Properties dialog box.
2. In the Document Title text box, select “Publishing Process” and type **Document Component** to replace the default title. Then click **OK** to return to the main window.

You have changed the title of only this source document, Publishing Process.doc. If you open Document Properties for any of the other source documents, you will see that the document title there is still the same as the document name.

3. In the Contents pane, select **Publishing Process.doc** again, and click **Edit Template**  on the toolbar to open that dialog box.
4. Click **Globals** and switch to the **Titles** tab dialog.
5. Under Document Component of Title, click **Use the title specified in the document properties**. Click **OK** to return to the Edit Template dialog box.

The title in the updated web page in the Preview window now reads “Publication Component Document Component.”

Set the page component of the title

When you split a source document into a series of smaller pages, you can use options in the Page Component of Title panel to add a further level of information to the title.

1. Click **Globals** and switch to the **Titles** tab dialog.
2. Under Title Contents, click **The Page Component**.
3. In the Page Component of Title panel, click **Use the following text**, and in the text box type **Page Component** (see Figure 12-5).

The content of the text box will now be added to the title, and will appear immediately after the document component.

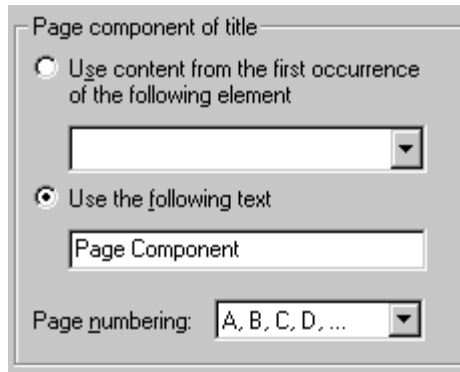


Figure 12-5 The Page Component of Title panel is only relevant if you have split a source document into multiple pages.

4. From the Page Numbering drop-down list, select **A, B, C, D**.
5. Click **OK** to return to the Edit Template dialog box.

Review your document once again in the Preview window. The title now reads “Publication Component Document Component Page Component A.” Click the Next Page button. As you can see, the title stays the same, except that the A changes to B. (When you split a document, you can move between the pages in the Preview window.)




Say you change the page component in the Titles tab dialog setting to **Use content from the first occurrence of the following element** and select Heading 1 from the list of elements. In that event, the title of the first page would read “Publication Component Document Component Servers and Staging A,” and for the second page it would read “Publication Component Document Component File Transfer B.”

6. Click **OK** to return to the main window, and then translate and view the web pages.

When you browse from page to page, you can see the changes in the Title at the top of the page. You can also see that the browser title bar displays the path and name of the file. This is not very descriptive of the page’s content. The next step is to add the title to the title bar, that is, to the <TITLE> tag.

Adding the title to the title bar of the web browser


1. In the Contents pane, select any source document and click **Globals** on the toolbar.

2. Switch to the Titles tab dialog.
3. Under Title Placement, check **Place a title in the title bar of the Web browser**.
4. Click **OK** to return to the main window.
5. Click **Save**  on the toolbar to save the project file and all the template changes.
6. Click **Translate**  on the large toolbar.
7. Select one of the source documents and click **View**  on the large toolbar to open the Web browser.

The title now appears in the application title bar of the browser in addition to the top of each web page (see Figure 12-6).

What happens when you use a frameset

Figure 12-6 shows the title you created in the title bar of the browser. When your publication has a frameset, however, the title of the frameset itself takes over.

1. In the main window, click **Layout**  on the standard toolbar to open the Layout dialog box. Under Active Layout, select Frame Layout.
2. Click the **New Vertical** button. Immediately, Document Publisher Station creates a frameset consisting of two frames, and assigns the TOC to the first frame and body pages to the second.
3. Click the **Frameset Properties** button to open that dialog box. Note the default frame title, "FrameTitle."
4. Click **OK**, and **OK** again to save the frameset you created and return to the main window.

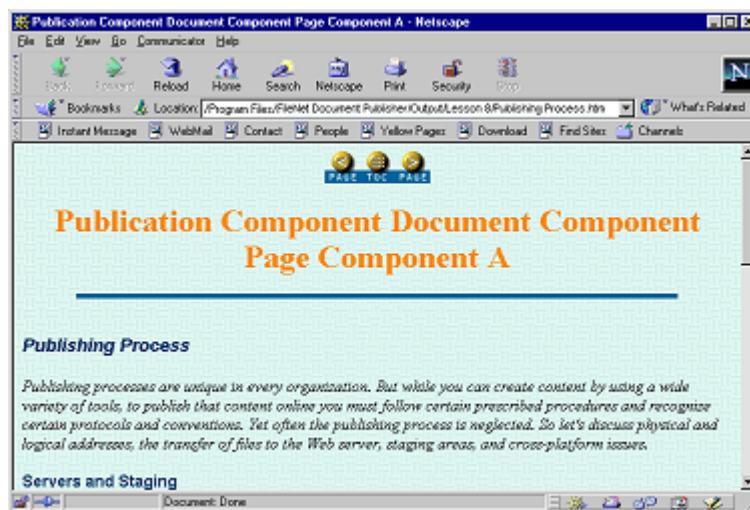




Figure 12-6 Note that the title now displays in the title bar of the browser. You handle titles differently when you use framesets.

5. Click **Translate**  on the toolbar and then **View** .

The web publication opens with the frameset (no matter what you select in the Contents pane). Note what now displays in the title bar of the browser (Figure 12-7).

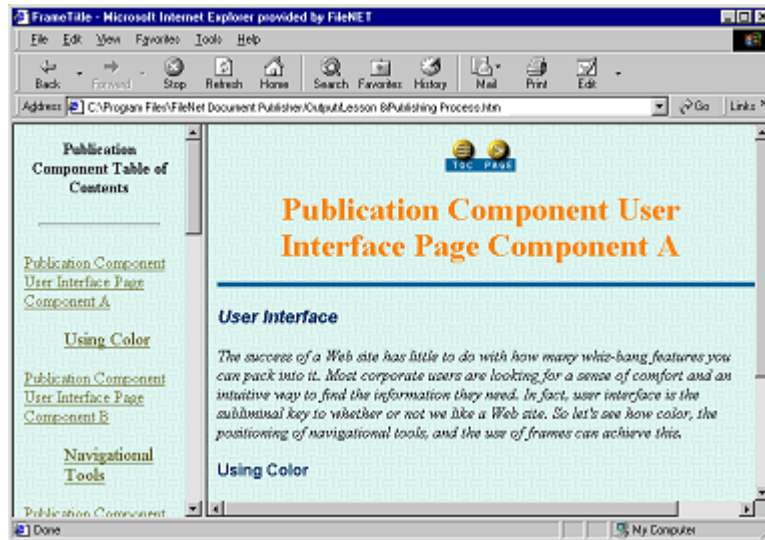


Figure 12-7 When you use a frameset, the frameset title displays in the browser title bar.

Tip

When you create a frameset, just remember that the frameset title is what will appear in the browser title bar. However, you may still want to create a title for the <TITLE> tag of your output pages. Although the title information will not display in the browser, it could still be useful, for example, if it were to be accessed by search engines. Moreover, you might want to create JavaScript to introduce more power into your web publication and conceivably you might want to access the title information that is placed in the <TITLE> tag.

LESSON 9

Handling ranks, styles, and patterns

A preliminary goal in project setup is to map the content of your source documents to elements so that you can use the elements to format your web pages. Elements are also useful in other ways, such as to promote content and create navigation links. So the more successful you are in mapping content, the greater your flexibility in creating web publications.

Document Publisher Station does much of this mapping for you. In fact, no matter how you bring a source document into Document Publisher Station, if the document is in one of the supported formats, you will always be able to translate it and create good-looking web pages.

This may, in fact, be all that you have to do, if you do not need to format content in special ways. But if you want your web pages to enjoy a high degree of visual appeal and functionality, you will probably want to refine the initial set of elements that you see when you first add documents to your project. How successful you are in mapping content to elements will depend on the nature of your source documents and how you choose to handle them.


Ranks, styles, and patterns

In Document Publisher Station, you map content to elements by using ranks, styles, and patterns. As you bring each source document into Document Publisher Station, you associate a template with the source document in the Choose Template dialog box. At the same time, you decide whether to accept the default None, which means that neither styles nor patterns will be imported from the source document, or to formally select Styles or Patterns.

Styles are the easiest to understand. If your source documents all contain named styles for headings and other content, Document Publisher Station will faithfully create an element for each style. If, on the other hand, they are manually formatted (all the content is in a single style even though the title may be 16 point Arial bold, the first-level headings 12 point Arial italic, and so on), it may be best to import patterns.

Problems can arise where documents, whether styled or manually formatted, are inconsistent in their treatment of content. Even greater difficulty can occur if you try to associate the same template with a mixture of styled and manually formatted documents (and try to import styles in one case and patterns in the other). In fact, a warning message will appear onscreen. That is because patterns take precedence over styles. So if you have both a pattern and a style that match a portion of content, the formatting instructions in the pattern will prevail.

That is where ranks come in. Ranks are ideal for handling source documents that are inconsistently formatted, and therefore are especially useful where your project contains one or more Directory Items (see Lesson 15). Unlike styles and patterns, ranks are not imported from source documents. Rather, Document Publisher Station applies them at translation time. Let us take a look at a simple project to see how all this works.

1. Open **Ranks1.tcp** from the `..\FileNet Document Publisher\Samples\en` directory. The Contents pane is empty because we have yet to add source documents to this project.
2. Click **Add Document**  on the toolbar and select **Page Navigation.doc** from the `..\FileNet Document Publisher\Samples\en\Styled` folder.

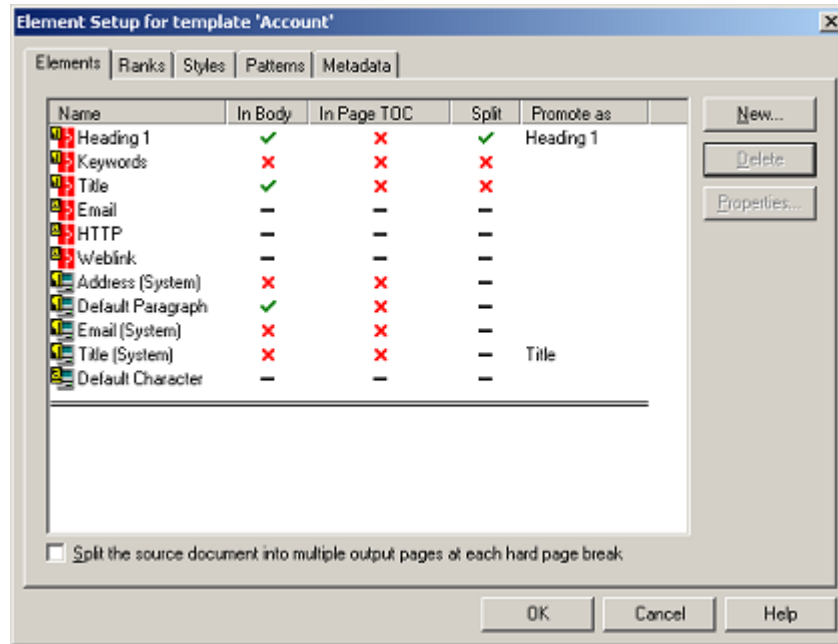





Figure 13-1 The Elements tab dialog for *Page Navigation.doc* when it is added to the project with the default setting *None* in the Choose Template dialog box.

3. When the Choose Template dialog box opens, make sure that **None** is selected under Import Styles or Patterns. Select the template **Account** and click **OK**.
4. Select the document in the Contents pane and click **Element Setup** . Click each tab, in turn, to see the initial setup. Figure 13-1 shows the Elements tab dialog.

If you tab through the property sheet, you will see that the template contains four ranks, no styles, three character patterns, and one metadata (Keywords). These are reflected in the list of Elements on the first tab. The ranks, patterns, and metadata are there by default. They appear in all general-purpose templates and can be used or ignored as you please. (See Appendix B, “Templates and Graphics Sets,” in the Getting Started manual.) In this case, since you are not importing styles or patterns, you would want to use the ranks to format your web pages. Notice that the four ranks (see Ranks tab dialog) are mapped to the elements Title, Heading 1, and Default Paragraph, which are listed in the Elements tab dialog (Default Paragraph is a default element that appears in all templates).

Let us try something else.

1. Click **OK** to leave the Element Setup dialog box.
2. Click **Add Document**  on the toolbar and again select **Page Navigation.doc** from the `..\FileNet Document Publisher\Samples\en\Styled` folder.

3. This time, when the Choose Template dialog box opens, select **Styles** under Import Styles or Patterns, select the template **Analysis**, and click **OK**.
4. In the Contents pane, select the second instance of the source document (the one associated with the template Analysis) and click **Element Setup** . Tab through the property sheet to see this setup. The elements list (Figure 13-2) is slightly different this time.

Although Document Publisher Station imported five new styles, there are only three new elements. That is because, thanks to the default ranks, there already is an element set up for Title and another for Heading 1. But if you wanted to use styles to format, that would be okay. Since styles take precedence over ranks, you can simply ignore the ranks.

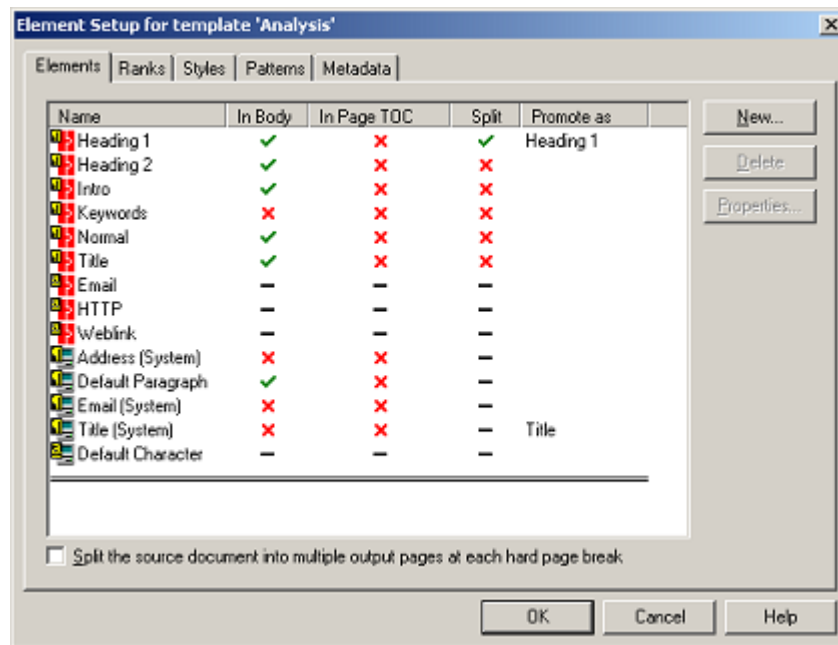




Figure 13-2 The Elements list reflects the addition of imported styles: Heading 2, Intro, and Normal.

Let us try this one more time.

1. Click **OK** to leave the Element Setup dialog box.
2. Click **Add Document**  on the toolbar and again select **Page Navigation.doc**.
3. This time, in the Choose Template dialog box, select **Patterns** under Import Styles or Patterns, select the template **Business**, and click **OK**.
4. In the Contents pane, select the newest instance of the source document and click **Element Setup** . Tab through the property sheet and note, in particular, the list of patterns in the Patterns tab dialog. Figure 13-3 shows the elements in this template.

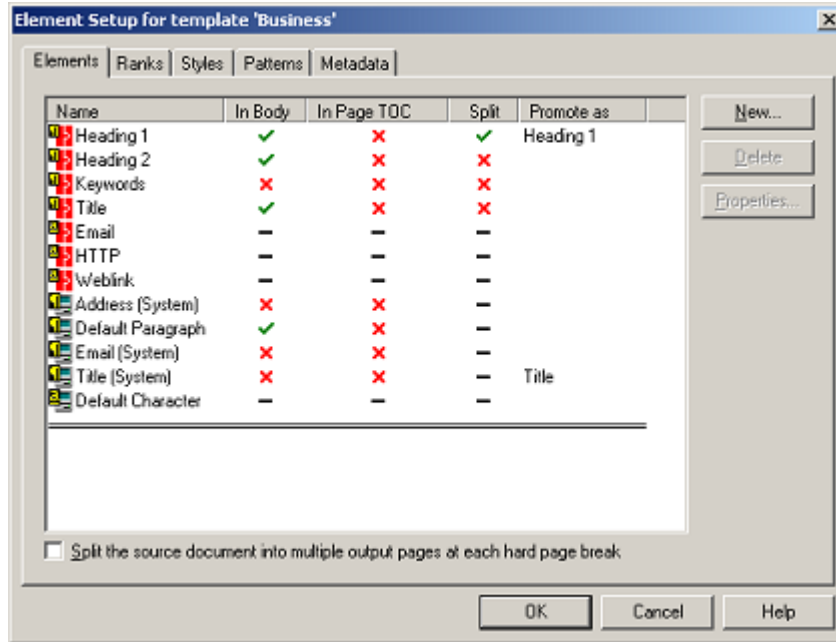


Figure 13-3 *Heading 2 is the only new element in this case because the elements for the other patterns that Document Publisher Station created already existed.*

When compared with Figure 13-1 (for that template, neither styles nor patterns were imported), we see only one new element: Heading 2. That is from the new pattern of that name. Document Publisher Station recognized five patterns in the source document (see the Patterns tab dialog). But elements for Title and Heading 1 already existed (thanks to ranks of those names), and two of the patterns have been mapped to Default Paragraph.

Just as styles take precedence over ranks, patterns do, too. In this instance, you could again ignore ranks, this time using only patterns to format the web pages. (Since the patterns are distinct—see the descriptions at the bottom of the tab dialog as you select each one—you could immediately create unique element names for the ones currently mapped to Default Paragraph.)

Try the following. First, select each of the templates, in turn, and click Edit Template. Pass your cursor slowly over the Preview window to see which elements apply to the source document in each case (a tooltip will display each element name as you do this). This will give you an appreciation of how your formatting options differ between the three templates because of the way in which ranks, styles, and patterns have been handled.

Second, translate the project. But wait. As things stand, you have three source documents all with the same name in your publication. If you click Translate, Document Publisher Station will translate each source document, in turn, using the output names specified (by default, the output file name is based on the input file name). Try it, if you like. You will end up with output for only one of the source documents—the last one that Document Publisher Station translates (the one associated with the Business template).

To get round this problem, you can do one of two things:

- Change the names of two of the output files. In the Contents pane, click on the output file twice, with a pause between clicks, and then rename the output file.
- Assign the output files to unique output directories. Right-click the first source document and choose Properties from the popup menu. Under Output

Directories, enter “Version 1” in the Pages text box. Do the same for the other two source documents (entering “Version 2” and “Version 3,” respectively).

As you navigate through each version of the source document you will see differences due to the templates used. You will also see how Document Publisher Station has successfully translated each version of the source document to create acceptable web pages.

Summary

The keys to successfully formatting web pages are to recognize that

- Content differences should shape your project setup strategy
- Ranks, styles, and patterns can all be used judiciously, depending on what you’re trying to accomplish
- Patterns take precedence over styles, and styles take precedence over ranks
- Document Publisher Station imports styles and patterns from the source documents, but it assigns ranks at translation time

So when should you use ranks, styles, and patterns?

- Use *only* styles where all source documents are not only styled but consistently styled.
- Use *only* patterns where all source documents are not only manually formatted but consistently manually formatted.
- Use ranks whenever you have a mixture of source documents

The above are not absolutes. For example, styles can work if, say, the style Heading 1 is consistently used as a first-level heading throughout the source documents, even if its formatting varies between documents. After all, the beauty of being able to map content to elements is that you can then format a single element to ensure that the varied content associated with that element throughout all source documents is treated consistently in the web pages you create.

But if, say, the style Heading 1 is used like a *title* in one source document but as a *first-level heading* in another, problems will quickly arise. In the case of patterns, Document Publisher Station will simply generate too many patterns and you will have to spend a great deal of time mapping content to elements. The beauty of ranks is that you improve your chances of being able to treat top-level content (Title and Heading 1) in a consistent manner. If the goal is simply to translate a mass of source documents and apply a basic look, then ranks—pretty much as default—will be fine as is. The key point to bear in mind is that there are only two elements you can format: Title and Heading 1. Which raises a second question: once you have added documents to a project, what next? What do you do after the basic setup is in place?

Click **OK** to leave the Element Setup dialog box. Open **Ranks2.tcp** (Document Publisher Station will prompt you to save Ranks1.tcp). Your Contents pane should look like what you see in Figure 13-4.

That is, the project contains five styled and two formatted documents from the ..\FileNet Document Publisher\Samples\en directory. The documents are all associated with the Business template. And all were brought into the project with the default None setting turned on in the Choose Template dialog box.

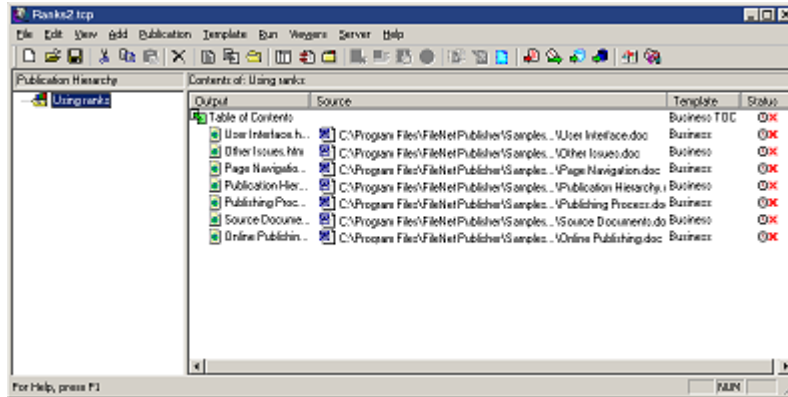



Figure 13-4 The Contents of the root publication for Ranks2.tcp.

Select one of the source documents and click **Element Setup** . (It does not matter which document, since they all share the same template.) Tab through the property sheet and note what you have. What you have, in fact, is the same as what you had when you imported the first document into Ranks1.tcp: four default ranks, no styles, three default patterns, and one default metadata. That is, the contents of the Elements tab dialog are exactly as in Figure 13-1. In fact, the Elements tab dialog is exactly how you would see it no matter how many source documents you added to the project, as long as None is the default in Choose Templates.

Translate and view the project. Again, see how, with the default translation by Document Publisher Station, you have a good basic setup for your web pages. But what is next? The problem is, you have only two elements you can format: Title and Heading 1. Everything else is mapped to Default Paragraph. (If you format Default Paragraph, the variety of content currently mapped to this element will suddenly all look the same.)

If you want to create a more sophisticated, flexible template, you must create additional ranks, and possibly also patterns. Patterns can make sense when you have special content such as a bulleted or numbered list that is unique in its formatting.

Tips

1. When you first start Document Publisher Station, the default setting under Import Styles or Patterns in the Choose Template dialog box is None. If you change this setting, it will stay changed for all projects until you change it again. So if your source documents are always styled, for example, select Styles and Document Publisher Station will import styles each time you add a source document to a project.
2. All general-purpose templates in Document Publisher Station include three character patterns and the Keywords metadata. The character patterns (HTTP, WWW, and Email) are designed to ensure that any http://, www, or mailto: links in your source documents are automatically linked whenever you create output pages.

LESSON 10

Managing templates

Document Publisher Station ships with a set of default templates as well as some starter templates for your projects. (See Appendix B, “Templates and Graphics Sets,” in the *Getting Started* manual.) You have complete flexibility in how you use these templates and create others. As you create projects, you are likely to use a growing number of templates, and the need to manage your templates will grow.

To begin, here are some pointers:

- Each time you start Document Publisher Station with an empty project, a copy of the default project file, Default.tcp, is open. This contains a master set of templates available for each new project.
- Document Publisher Station provides three types of template: body, reference, and index. Most of the starter templates consist of a template of each type (for example, Administration, Administration TOC, and Administration Index).
- Apart from Blank template, each template in Document Publisher Station, including the default template, has certain settings in place. You can modify these settings any way you want, including by switching graphics Sets between templates.
- You can easily create new templates based on existing templates (default, starter, or ones you have created yourself).
- You can switch graphics Sets between templates with ease.
- You can easily rename templates (it is best to do this in the Manage Templates dialog box).
- You can create a standalone template to create a template file and place it anywhere on your network; any other user can then import that template by using the Import command in Manage Templates or link to that template.
- Blank is the default body template on which all other body templates are based. There are also default reference and index templates (not listed in the Manage Templates dialog box unless used in a project), which have certain default settings to ensure they function properly.


The keys to template management are

- Creating any new templates you need
- Updating and tracking them
- Sharing them with others

Although you created a new template in Lesson 3 of the “Seven Easy Lessons,” we will begin this lesson by quickly going through this simple process again in order to demonstrate a point later in the lesson. In addition, you will learn how to

- Export templates
- Import templates
- Link to an external template

Create a template

1. Open **Templates.tcp** from `..\FileNet Document Publisher\Samples\en`.
2. Click **Manage Templates**  to open that dialog box and review the current template list. See Figure 14-1.

This list confirms the current associations in the project (each of the four source documents happens to be associated with a different template). Since `Template.tcp` is based on the default project file, it shows the master set of templates available in the default project file.

3. In the Manage Templates dialog box, click **New** to open the New Template dialog box. Name the new template **Archive New** and base it on Archive CSS. Accept the default setting to create a body template.
4. Click **OK** to return to the Manage Templates dialog box.

Creating a new template is that simple. You can name the template, base it on an existing template, and select a template type all in the same dialog box.

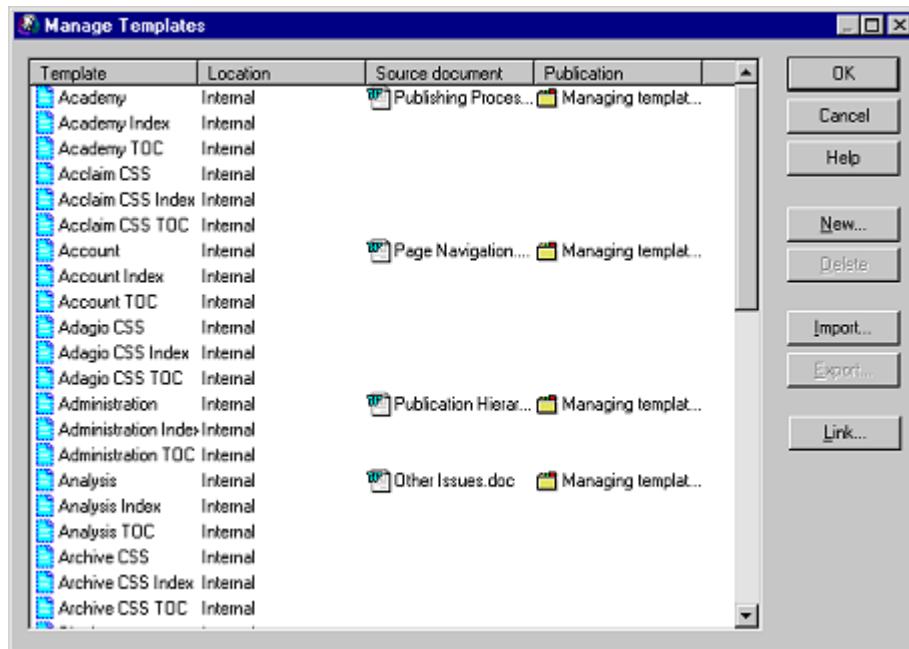


Figure 14-1 The Manage Template dialog box, showing all the templates available in Document Publisher Station.

Export templates

You could export templates for a number of reasons. You may want to simplify your project (and reduce the size of the project file) by exporting templates that simply clutter up the template list in Manage Templates. You may want to make a particular template available for another project or to another user. Or you may want others to be able to link to the template from anywhere on the network.

1. Select **Archive New** and click **Export** to open the Export Template dialog box.

2. Use the Save In drop-down box to locate the ..\FileNet Document Publisher\Samples\en\Other folder in which to save the exported template. Then click **Save** to create a standalone template file. Document Publisher Station will automatically apply the **.ttp** extension if you do not specify it. Document Publisher Station will then return you to the Manage Templates dialog box, where the original Archive New is still listed. (When you export a template, you make a copy of the original, which remains with the project.)
3. With **Archive New** still selected in the Template list, click **Delete**.
4. Now click **Administration**, and then **Export**. In the Export Template dialog box, rename the template **Admin New** and click **Save** to save it to the same folder as Archive New.
5. In the Template list, click **Analysis** twice, with a pause between clicks, and rename the template **Analysis New**. Export this template, also to the same folder.

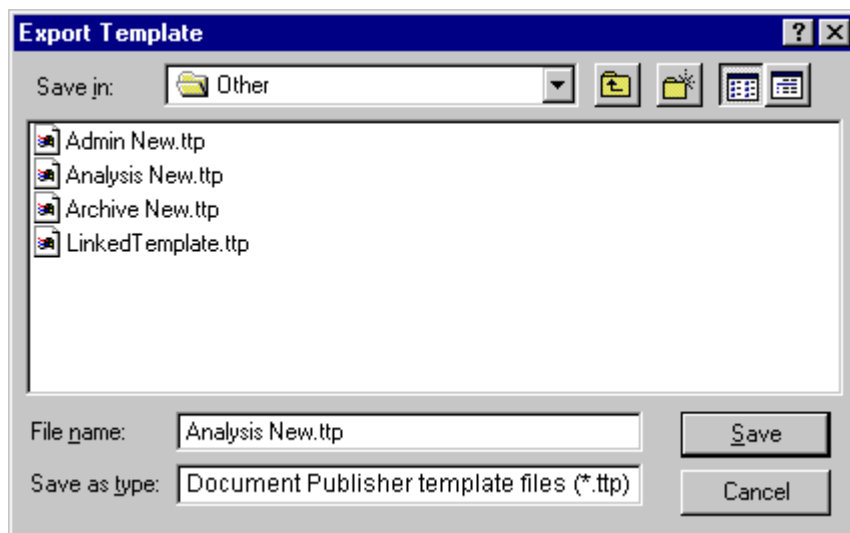


Figure 14-2 Document Publisher Station automatically applies the *.ttp* extension to all template files you create.

Let us take stock. You created Archive New in the New Template dialog box, based on Archive CSS, and you deleted this template from the project after you exported it. You then created Admin New in the Export Template dialog box *as you exported* a copy of Administration. Finally, you created Analysis New in the Manage Template dialog box by renaming Analysis, and exported that template, too. (Whenever you export a template, you simply make a copy of it. The original is still in Manage Templates, unless you delete it from there.)

Import templates

When you import, several issues arise. As we shall see, the underlying name of the template can be one issue. Another might be where the template was created because of the references to Gallery graphics the template contains.

1. In the Manage Templates dialog box, click **Import** to open the Import Template dialog box.
2. Locate the ..\FileNet Document Publisher\Samples\en\Other folder containing the templates you exported. Select **Archive New** and click **Open**. Document

Publisher Station closes the Import Template dialog box and the Template Paths Verification dialog box opens. Each time a template is moved, Document Publisher Station verifies the paths of the graphics referenced in the template.

3. Click **OK** and Document Publisher Station returns you to the Manage Templates dialog box, where Archive New is now listed.

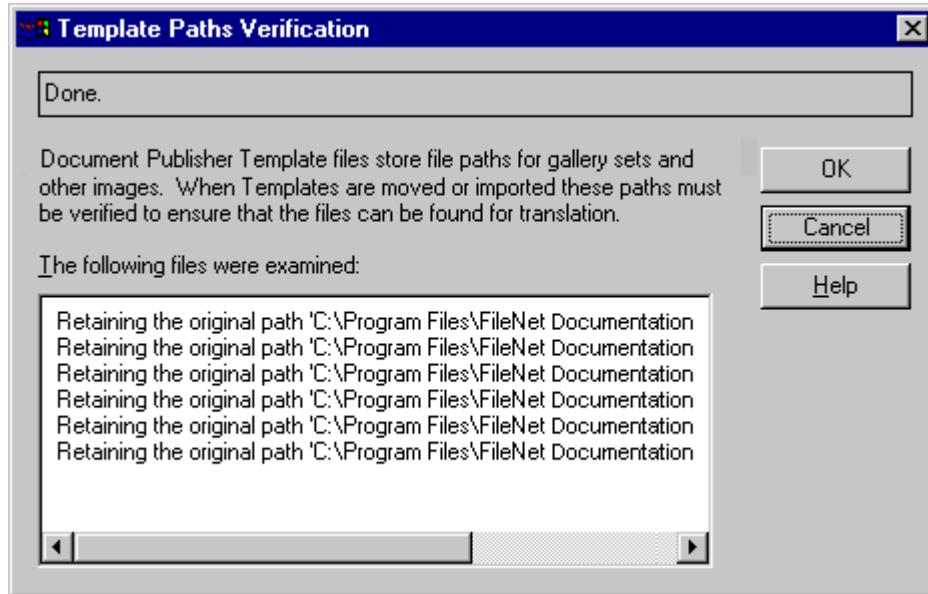


Figure 14-3 Each time Document Publisher Station imports a template, it verifies the paths of the graphics referenced in the template.

This was straightforward. But a couple of things can happen when you import templates that you should be aware of.

1. Click **Import** again and select **Analysis New**. Click **OK** when the Template Paths Verification dialog appears. This time, the Manage Templates dialog box doesn't open immediately. Instead, the Template Name Conflict dialog box opens, as shown in Figure 14-4.
2. Click **Overwrite existing template**, and then click **OK**. Once again you are returned to the Manage Templates dialog box.
3. Click **Import** again, and this time select **Admin New**. Once again the Template Name Conflict dialog box appears. See Figure 14-4.

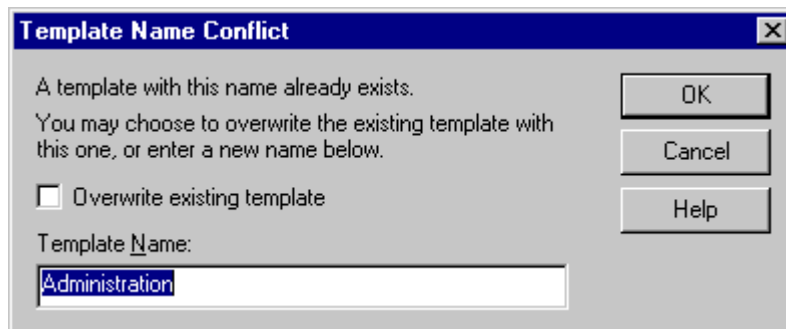


Figure 14-4 The name shown in the Template Name text box is the underlying template name, which may be different from the template file name.

Note the name in the Template Name text box: Administration, not Admin New. When you renamed the template as you exported it, you did so in the


Export Template dialog box. In effect, you named the *template file*. But the underlying template name of “Administration” remained associated with the template and that is what Document Publisher Station recognizes when you import it. If the project no longer contained the Administration template, you would be able to import Admin New without this dialog box appearing—but the template name in the Template list in Manage Templates would be “Administration,” not “Admin New.”

4. Accept the name Administration and click **Overwrite existing template**.

Link to an external template

In Document Publisher Station, templates typically are internal—in effect, they are saved as part of the project file and you never see any physical evidence of them, except in the various formatting and other settings. As you have seen, you can easily export a template to create a standalone template file. You can also import such a file.

Another option is to link to an external, standalone file. This can be especially helpful if you want to make the same template available to a group of content authors while also controlling the use of that template. This is possible because you can create a link to a standalone template and use it just like any other—except that it has to be imported into a project in order to edit it.

1. With **Templates.tcp** still open in Document Publisher Station, click **Manage Templates**  to open the Manage Templates dialog box once again.

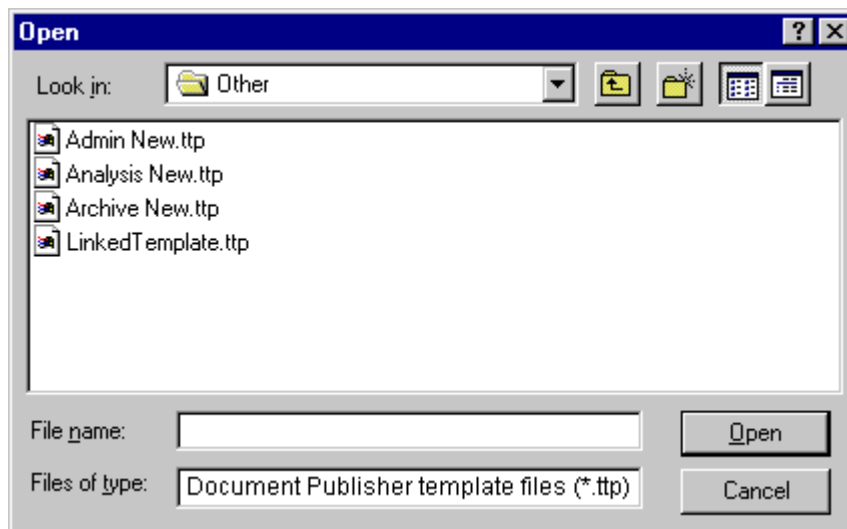



Figure 14-5 Clicking **Link** in the Manage Templates dialog box opens the Link Template dialog box. Any template opened from this dialog will become a linked template in the project. Its path will display in the Location column of Manage Templates.

2. Click the **Link** button to open the Link Template dialog box. See Figure 14-5.
3. Once again locate the `..\FileNet Document Publisher\Samples\en\Other` folder. Select **LinkedTemplate.ttp** and click **Open**. You will return to the Manage Template dialog box, where the template is now listed, with the Location column showing the path and name of the linked template. (You may have to widen the Location column in order to see the full path and template name.)

4. Click **OK** to return to the main window.
5. In the Contents pane, select one of the source documents and click **Choose Template**  on the toolbar to open that dialog box.
6. Associate the source document with **LinkedTemplate** and click **OK** to return to the main window.
7. In the Contents pane, select the source document associated with the linked template and note the result.

Except for the Choose Template and Manage Templates commands, the Template toolbar is not available. That's because you cannot edit a linked template while it is linked—the template must be formally imported into a Document Publisher Station project in order to edit it. An advantage of a linked template is that two or more content creators can consistently apply the same template while not being able to change it, thus making it easier to maintain publishing standards.

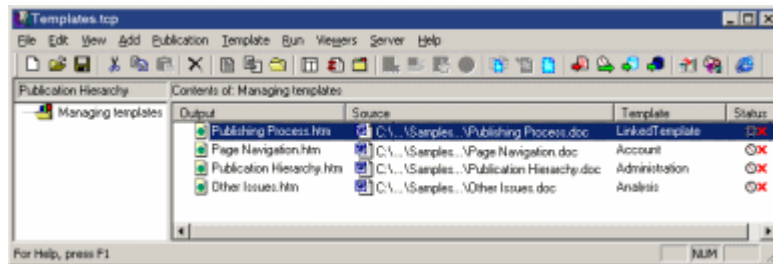


Figure 14-6 When the source document *Publishing Process.doc* is associated with the linked template “*LinkedTemplate*,” only the Choose Template and Manage Templates commands are available on the Template toolbar.

Tips

1. Project files can become quite large. You might want to edit the Default.tcp by either deleting unwanted templates from the default project file or “parking” them until you need them—that is, export the unwanted templates until you are ready to use them. See Chapter 4 of the Installation Guide to learn how to edit the default project file.
2. You might also want to edit the default project file by modifying the Blank template. This template contains few settings and is ideal when you simply want to “pass through” source documents to see how they will look without any special formatting. But you could, if you like, associate a graphics Set with the Blank template so that each new template you create already has the Set associated with it. Again, see editing the default project file.
3. There are three types of template: body, reference, and index. Although you can create a Table of Contents (TOC), List of Tables (LOT), and List of Figures (LOF), you are actually using the same default template in each case.
4. A “CSS template” is simply one with CSS (Cascading Style Sheets) turned on. You can, of course, use a non-CSS template from the starter list and simply turn on CSS. Likewise, if you choose a CSS template, you can always turn off CSS.
5. As you create new templates, rename existing ones, and edit the default project file, you might want to give some thought to template names.

6. This lesson (like the others in the Tutorial) discusses only Default.tcp, the default project file used to create HTML projects. You can also create WML projects (to generate WML output that can be published to a WAP server and accessed via an Internet-ready device). To create WML projects, you use a second default project file: DefaultWML.tcp. See “Creating a WML project,” a PDF file in the Documentation folder, for more information.

LESSON 11

Making use of metadata

Metadata is simply “data about data.” Many source documents have a number of properties separate from the content of the documents themselves. Typically, these can be viewed in the Properties dialog box of the application. Such metadata can include the document’s title and author, the type and size of the file, the date the document was created, and keywords. Some properties are automatically generated by the application when you create the document. Typically, you can also create additional, custom properties at any time to suit your organization’s needs.


Just as you can include metadata in, for example, the header or footer of a source document, so in Document Publisher Station you can include metadata in the Meta tag of body pages and also display it in the output web pages. Document Publisher Station even lets you include the content associated with any element in the Meta tag in this fashion. So when properly handled, metadata can become a useful part of your web publication, making it easy for users to search your web site.

Note: This lesson deals only with the properties of a source document as described above. However, metadata also refers to those property values and security settings that you formally assign to a document when you check that document into FileNet Content Manager or FileNet Content Services. For more information on this type of metadata (which we call repository metadata) and how it might be assigned to your web pages, see online Help.

In this lesson, you will

- Create a new metadata
- Include both the new metadata and the default Keywords metadata in the Meta tag of a body page
- Include the Heading 1 element in the Meta tag

Create a new metadata

1. Open **Metadata.tcp** from the `..\FileNet Document Publisher\Samples\en` subdirectory.
2. Select either of the two source documents (they are both associated with the same template) and click **Element Setup**  on the toolbar.
3. Click **Metadata** to open that tab dialog. Note that the default metadata named Keywords already exists (it is included in the starter templates that ship with Document Publisher Station). Select **Keywords** and click **Properties**. See Figure 15-1.

Note that the Keywords metadata is a standard metadata (as opposed to custom) and is mapped to its own element, Keywords.

4. Click **Cancel** to leave the Metadata Properties dialog box.

The Metadata tab dialog is where you organize the metadata you want to add to your web publication. Keywords already exists in this template. Let us create a new metadata.

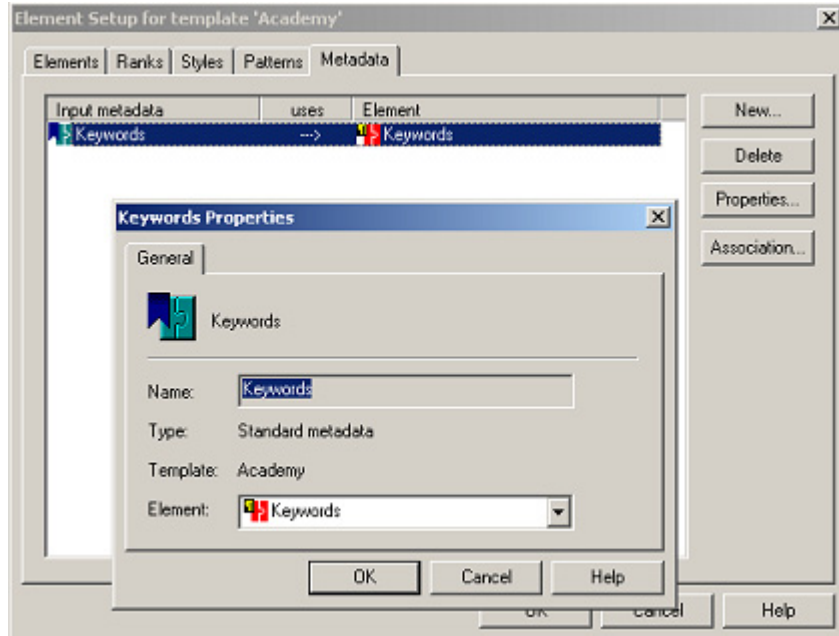


Figure 15-1 The Metadata tab dialog with the Metadata Properties dialog box on top.

5. Click the **New** button to open the New Metadata dialog box. See Figure 15-2.
Note that you have three options: to create new metadata by selecting a standard entry from the drop-down list, specify a custom metadata (see Tips at end of lesson), or specify a repository (FileNet Content Manager or FileNet Content Services) metadata. Note, also, that the Associated Element text box is empty. Using an existing element may be useful in some instances, but typically you will want to create a new element for each metadata.
6. Accept the default setting **Standard** and select **Author** from the drop-down list.
7. Click **New** opposite Associated Element text box to open the New Element dialog box. This is the same dialog box you use to create new elements for ranks, styles, and patterns. Here, we are creating metadata, so the Element Type options are grayed out.

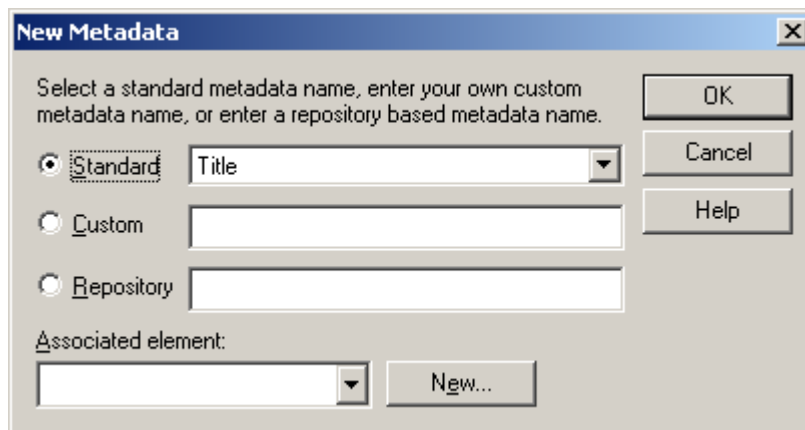


Figure 15-2 The New Metadata dialog box, where you select a name for the metadata you want to add to your publication. You also associate the metadata with an element.

8. In the Name text box, type **Author**. Leave the default tag <P> as is.

9. Click **OK** to return to the New Metadata dialog box, where the new element Author is selected in the Associated Element text box. See Figure 15-3.
10. Click **OK** to return to Element Setup, and then click **Elements** to open that tab dialog.

The Author element is now listed at the beginning of the Elements list, along with the default Keywords metadata. By default, neither is included in the body page. However, both are automatically included in the Meta tags of the body pages that will be created when Document Publisher Station translates the project. Let us confirm this.

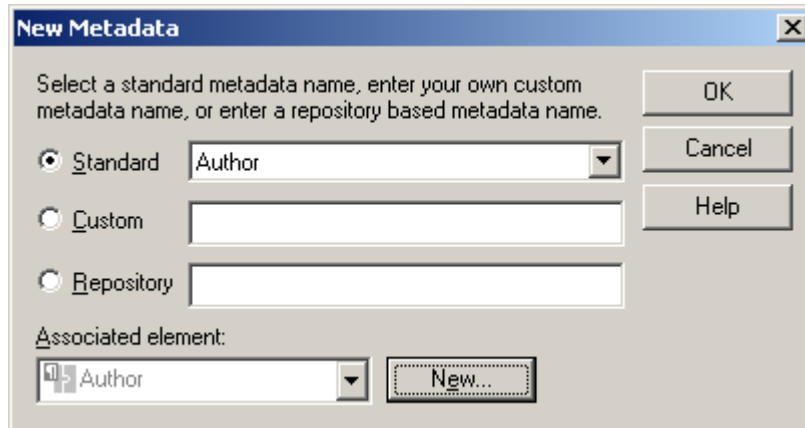




Figure 15-3 The New Metadata dialog box showing the standard metadata Author created with its own element, Author.

1. Click **OK** to return to the main window, and click **Translate**  on the toolbar.
2. Click **View** . (If no source document is selected in the Contents pane, the first one listed—Publishing Process—will open.)
3. In the browser window, right-click and choose **View Source** from the popup menu. You should see something like Figure 15-4.

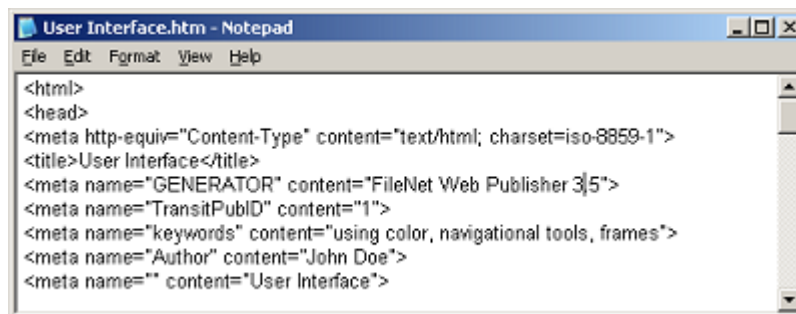


Figure 15-4 A view of the HTML output file showing the different information included in Meta tags in the Head of the file.

Note that the several Meta tags include the two for metadata: “Keywords” and “Author.” You might also want to page through the web publication and right-click on another page. For example, on the opening page of Publishing Process you will see that the metadata changes, because the properties of that source document are different.

To confirm that these are the properties of the source documents, return to the Document Publisher Station main window and right-click **User Interface** and choose **Open Source Document** from the popup menu. Then, in Word, choose **Properties** from the File menu and click **Summary** to open that tab dialog. There, you will see the information that appears in the Meta tags.

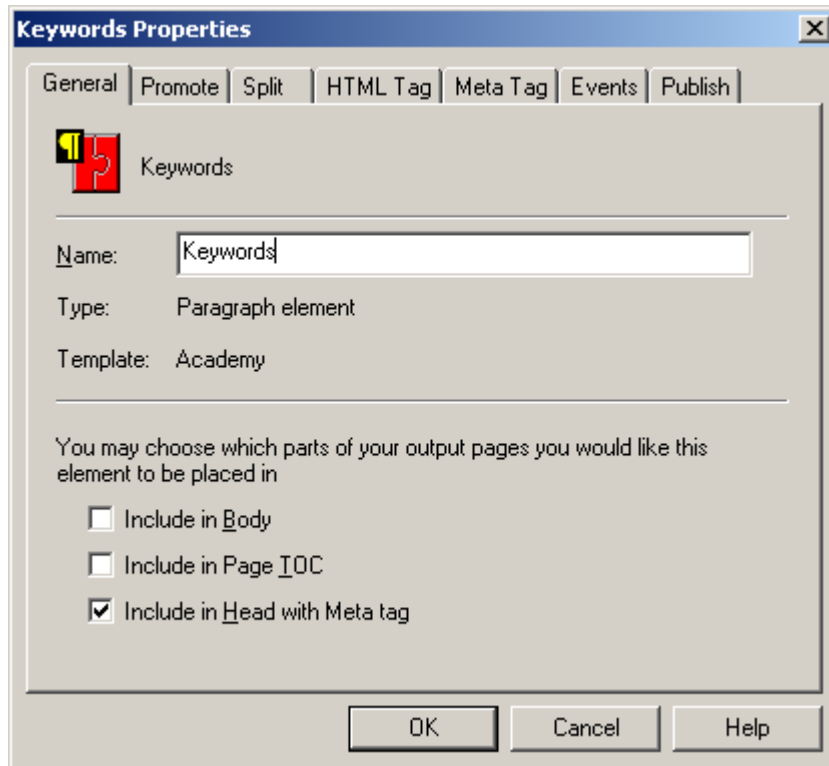


Figure 15-5 By default, metadata are placed in a Meta tag in the Head of output pages.

Include metadata in the Meta tag

Although metadata are included by default in the Meta tags, it is worth taking a moment to review the default settings that ensures this.

1. In Element Setup, click **Elements** to open that tab dialog.
2. Select **Keywords** and click **Properties** to open that dialog box.

In the General tab dialog, note that the default setting is to place metadata in a Meta tag in the Head of all body pages associated with the template. Note the two other options: to include the metadata in the body of the web pages and also in the page TOC (that is, to display in your browser). See Figure 15-5.

3. Click **Meta Tag** to open that tab dialog (see Figure 15-6).

The Metadata name **Keywords** is already entered in the text box. Note the option to use custom tags. These generally are not necessary.

4. Click **OK** to return to Element Setup.

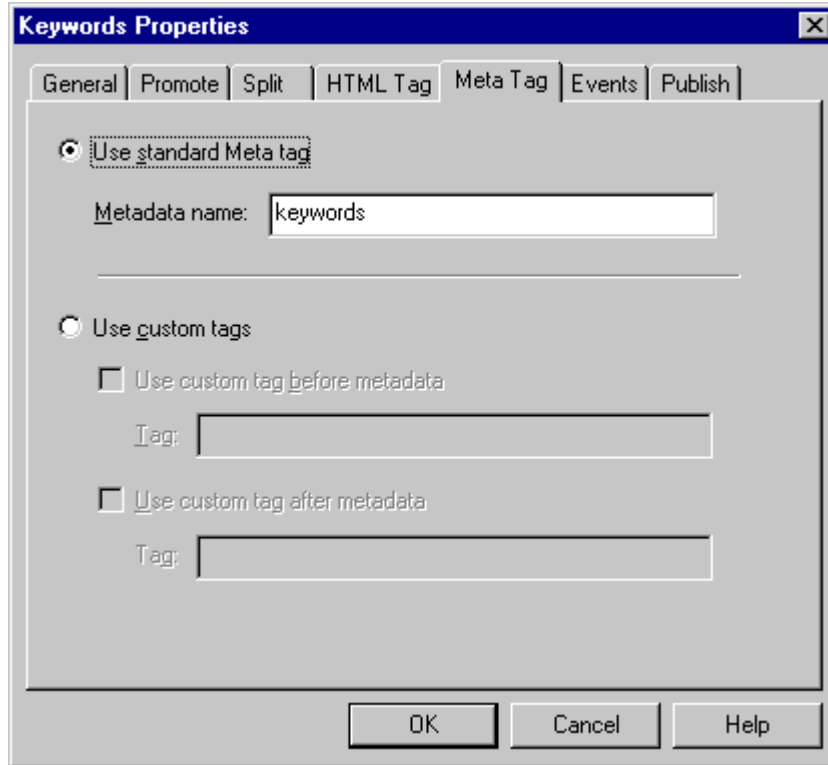


Figure 15-6 The Metadata name is entered by default in the text box Metadata Properties. But you can change it, if you want. You can also use custom tags, if you prefer.

Include Heading 1 in Meta tags

1. In the Elements tab dialog, select **Heading 1** and click **Properties**. Note the default in the General tab dialog. Regular elements are always included by default in the body of the output but not in the page TOC or in a Meta tag in the Head.
2. Click the **Include in Head with Meta tag** check box.
3. Click **Meta Tag** to open that tab dialog. In the Metadata Name text box, enter **Heading 1**. This will be used to identify the content in a specific Meta tag.
4. Click **OK**, and **OK** again.
5. Translate and view your web publication. Again, right-click on the opening page of one of the two source documents and view the changes in the Meta tag entries. You should now see one that reads

```
<meta name="Heading 1" content="Using Color">
```

You can page through the web publication and view source to see how each Heading 1 has been picked up in the Head section in this way.

That was just a brief introduction to metadata. Be sure to read the following.

Tips

1. The metadata you can obtain from source documents to include in Meta tags will vary by the format of the source document. With some source documents, you may not be able to generate metadata at all. Others will let you generate only standard metadata. Only with Word, Excel, and PowerPoint (version 97 and later, in each case) can you generate custom metadata. You need to experiment with source documents to see what can be brought into your HTML files.
2. Keep in mind, too, the need to control metadata in the source documents themselves. The standard properties of a document may be dated. For example, the properties of a Word file include its title and author. But the title may simply be the first word typed in the document. Likewise, one person may have been the originator of a document (his or her name will be a property) but the document may have been passed to another who may be responsible for creating the bulk of the content and for maintaining the document. Also, if you create one document by making a copy of another, the new document will inherit the properties of the first document. In short, some cleanup of source documents may be in order, depending on which properties from those documents you plan to include in the Meta tag of your web pages.
3. Not all the metadata in this list are necessarily available from your source documents. Again, you need to experiment.
4. See online Help (search under “metadata”) for explanations of how you can place repository metadata in web pages and also publish standard and custom metadata to Document Publisher Server.

In Lesson 1 you created a simple frameset to display a table of contents and a body page. Framesets can be more sophisticated. In fact, they can be a powerful tool for organizing the content of your source documents and managing the various reference pages you choose to create.

While framesets are potentially complex—the ease of creating framesets in Document Publisher Station is tempting—you still must think through the structure of your web publication so as not to overwhelm your users with too many frames and therefore too many competing pages. A frameset of no more than four or five frames will suit most purposes. Always try to envision how you want your publication to appear onscreen.

In this lesson, you will

- Create a frameset and apply it to three publications
- Add links for navigating between the framesets
- Promote index entries to the top index and eliminate indexes in the subpublications
- Refine the appearance of the TOC in the top frameset
- Add a Print button to the top-level TOC
- Name the framesets to control what displays in the browser title bar

LESSON 12

Creating a more sophisticated frameset

In Lesson 1 you created a simple frameset to display a table of contents and a body page. Framesets can be more sophisticated. In fact, they can be a powerful tool for organizing the content of your source documents and managing the various reference pages you choose to create.

While framesets are potentially complex—the ease of creating framesets in Document Publisher Station is tempting—you still must think through the structure of your web publication so as not to overwhelm your users with too many frames and therefore too many competing pages. A frameset of no more than four or five frames will suit most purposes. Always try to envision how you want your publication to appear onscreen.

In this lesson, you will

- Create a frameset and apply it to three publications
- Add links for navigating between the framesets
- Promote index entries to the top index and eliminate indexes in the subpublications
- Refine the appearance of the TOC in the top frameset
- Add a Print button to the top-level TOC
- Name the framesets to control what displays in the browser title bar

Create a frameset

1. Open **Frameset.tcp**, which consists of a root publication and two subpublications. The root publication contains a TOC, an index, and a single source document (First Page.doc). Each of the subpublications contains a TOC, an index, and two or three source documents.

2. Click **Translate** .

3. In the Publication Hierarchy pane, select the root publication and click anywhere in the Contents pane so that nothing is selected there.

The project does not contain any framesets yet. By selecting no output page in the Contents pane, you ensure that the browser will open the first page—the TOC for the root publication.

4. Click **View** . The opening page is as shown in Figure 16-1.

While all your content has been gathered together in the project, framesets are not yet being used to properly structure it. The only links between the root TOC and the rest of the publication are via entries in the TOC (Document Publisher Station creates these links automatically when it builds the reference page). Also, the browser title bar displays the title of the root publication (which you can confirm by opening the Publication Properties dialog box and also by opening the Titles tab dialog of Globals).

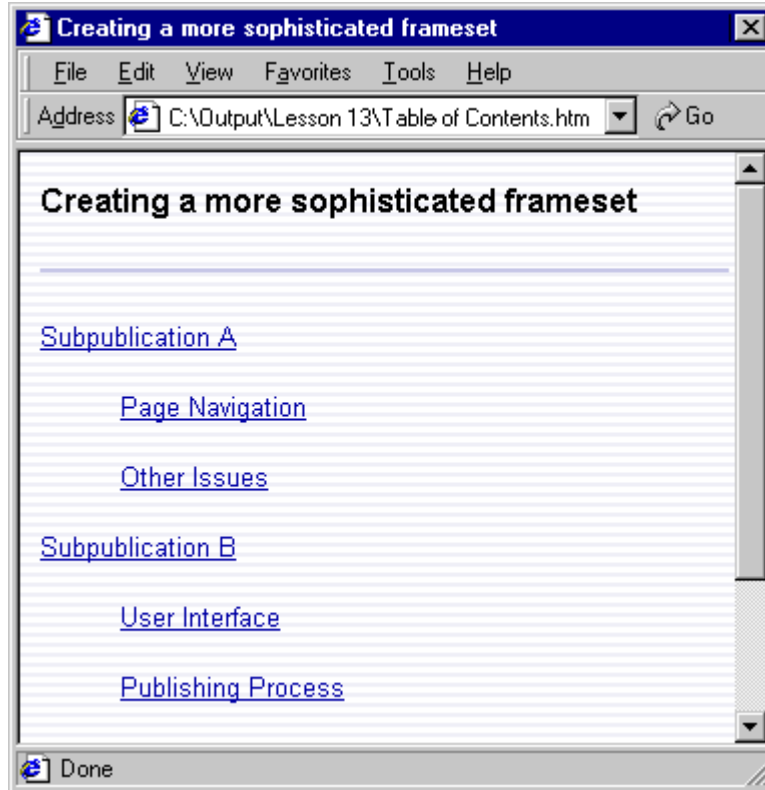




Figure 16-1 With your publication unframed, only one page can be viewed at a time. Also, the browser title bar displays the publication title, not the frame title.

In the browser window, click **Page Navigation** under Subpublication A, to jump to that document in Subpublication A (which looks different because of the graphics Set associated with the template). But when you click the TOC button on that page, you will jump to the TOC for the subpublication—not back to the main TOC.

Try something else. In the main window of Document Publisher Station, select the

root publication, and then select **Index** in the Contents pane and click **View** . An error message will appear. There are index entries in the indexes of the two subpublications (open them and see), but the content has not yet been promoted to the top index.

So we have several tasks before us.

1. Click **Layout**  on the toolbar to open the Layout dialog box.
2. Under Active Layout, select Frame Layout. See Figure 16-2.

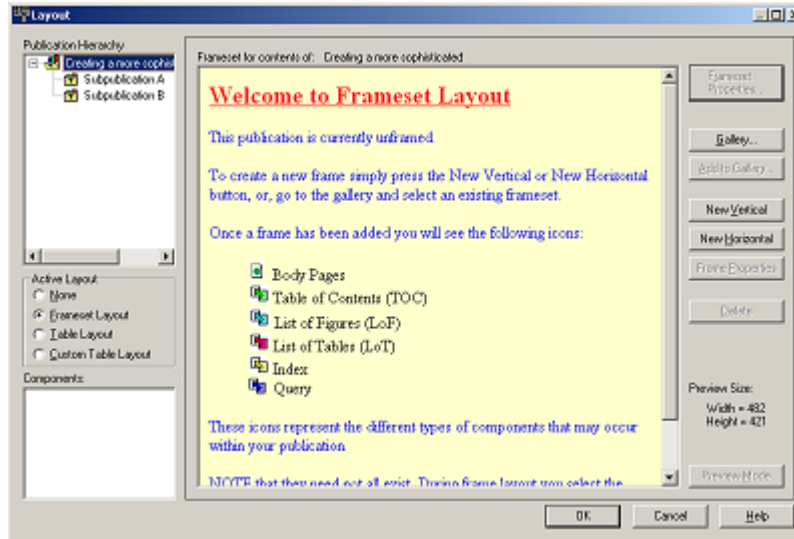


Figure 16-2 The Layout dialog box, with the publication hierarchy displayed in the Publication Hierarchy box at the top-left. When you first enter the dialog box, you may have to click the scrollbar at the bottom of the box in order to display the plus sign, which you can click to display the subpublications.

3. In the Publication Hierarchy box at the top left, select **Creating a more sophisticated frameset** if the root publication is not already selected. Click the **New Vertical** button to create two frames: trFrame1 and trFrame2. Both frames are immediately populated: the first with the TOC icon, and the second with the Body Pages and Index icons. When you create a frameset, Body Pages is automatically added to one of the frames. The TOC and Index icons have been assigned here because these reference pages already exist in the publication.
4. With your mouse, drag the Index icon from trFrame2 and drop it into trFrame1. Now the TOC and Index are assigned to the same frame. That is fine, because we're going to create a frame in which you can toggle between these two reference pages. Since the TOC is listed first here, it will open first in your browser.
5. In the Publication Hierarchy box, click the scrollbar at the bottom, if necessary, to reveal the plus box for the root publication, and click the plus sign to display the subpublications. Select each subpublication, in turn, and note that neither currently has a frameset. That is easy to fix.
6. Right-click the root publication and choose **Copy** from the popup menu. Then select one of the subpublications and right-click again. This time choose **Paste Special** from the popup menu, and on the submenu click **All publications in the project**. The subpublication now has the same frameset as the root publication. Click the other subpublication in the Publication Hierarchy box and you will see that it, too, has the same frameset.
7. Click **OK** to save your changes in the Layout dialog box and return to the main window. Click **Translate** and then **View** and see what you've accomplished.

You have created a simple frameset for your root publication and applied it to the two subpublications. Populating the framesets was easy, thanks to default settings in FileNet. But there are still navigation problems.

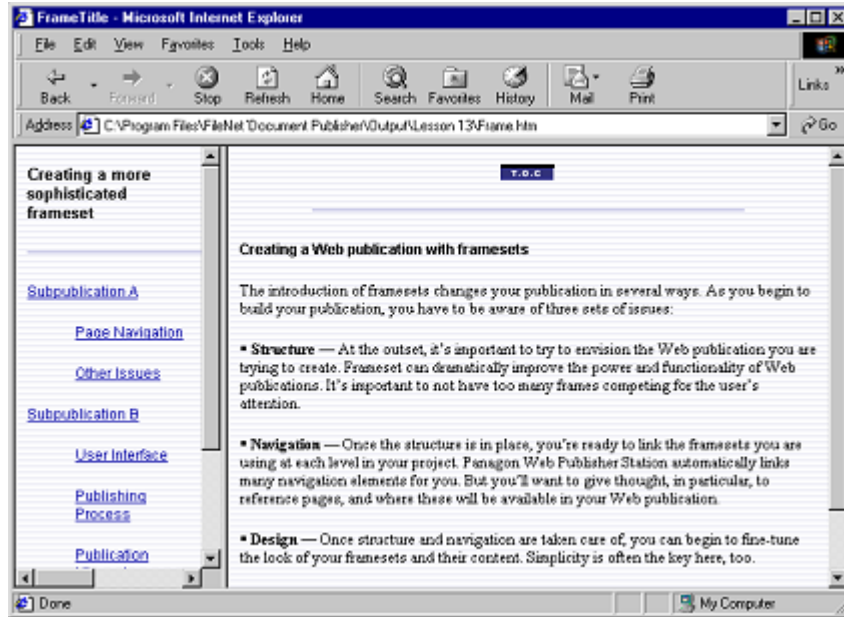


Figure 16-3 Here is a simple frameset with two frames. Note that the browser title bar now displays the title of the frame — the default “FrameTitle.” The main page displays a TOC button at the top of the page and a Top of Page button at the bottom, thanks to default settings in the template. It will display an Index button once the index is built.


Add links for navigating between the framesets

Remember: you want to be able to toggle between the TOC and Index in the first frame at the top level of the publication. To create the Index, you must promote index entries from the source documents in the two subpublications. Once you do that, you can eliminate the two indexes at the subpublication level.

1. In the Publication Hierarchy, select the root publication **Creating a more sophisticated frameset**, and then select the **TOC** in the Contents pane. Click

Navigation .

2. Under Link Type, opposite Index, double-click in the Before column to place an Index button in the TOC (note that the icon from the graphics Set associated with the template appears in the preview window below). Under alignment, select **Center**. Click **OK**.

3. Now select the **Index** in the Contents pane and click **Navigation** . This time, double-click opposite Table of Contents in the Before column to add a TOC button to the Index. Center this button, too. Click **OK**.

You have created the necessary buttons to toggle between the TOC and Index. But if you were to translate and view the publication now, the Index button still would not appear on the TOC because the Index still does not exist. (Document Publisher Station does not create output HTML files for empty reference pages.)

Populate the top-level index and eliminate the sublevel indexes

Let us populate the top-level index.

1. In the Publication Hierarchy pane, select one of the subpublications (it does not matter which one, since both are associated with the same template). In the

Contents pane, select the Index and click **Element Setup** .

2. In the Elements tab dialog, note that the Promote As column is empty (except for the default promotion of the Title (System) element as Title). Double-click in the Promote As column opposite Index Entry and Index SubEntry, in turn. (These are special Index elements created for every index you build.)

You have promoted each of these elements. Normally, you would have to go to the top-level reference page and formally include the elements there. However, since these elements exist by default in all Index reference pages, you do not need to do anything.

3. Still in the Elements tab dialog, in the In Body column, double-click opposite those same elements—you have now removed those entries from the indexes of the subpublications. Once you save these changes, these indexes will be empty and will not display in your web publication. Figure 16-4 shows how the elements list should look once you are done.

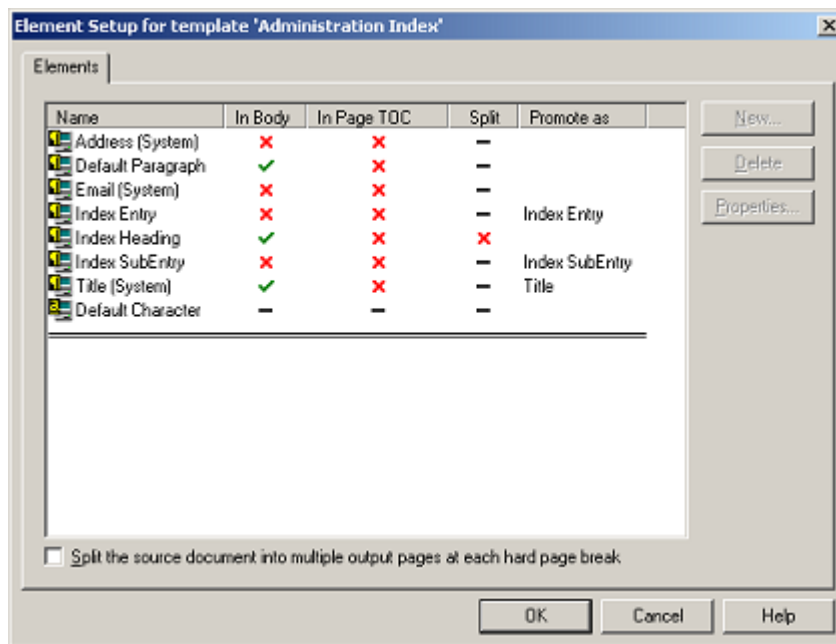


Figure 16-4 Element Setup for the template used for the indexes of the subpublications. Note that, for an index reference template, only the Elements tab dialog is available.

4. Click **OK** to return to the main window. Then click **Translate** again, select the main TOC, and click **View**.

Since the index now exists, the Index button is now on the TOC (the button can also be seen in the main frame). You can confirm this by clicking the Index button. See Figure 16-5.

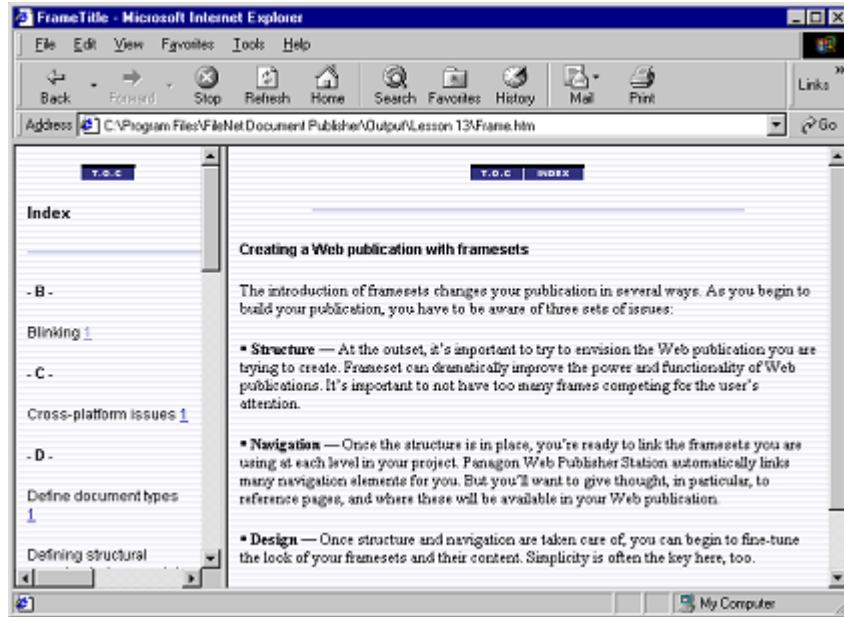



Figure 16-5 The top-level index, showing index entries from documents in the subpublications.


5. The Index has a TOC button, which you added. Click it and you will return to the main TOC. So you can now toggle between the two reference pages.
6. Click one of the entries on the TOC and you will go to that document in one of the subpublications. Note that clicking the TOC button on the TOC of one of the subpublications takes you back to the top-level TOC.

Refine the appearance of the top-level TOC

With our basic navigation now in place, let us improve the appearance of the top-level TOC.

1. Click **Layout**  to open that dialog box. With the root publication selected in the Publication Hierarchy box, double-click the **trFrame1** frame, containing the TOC and Index icons, to open the Frame Properties dialog box for that frame. (You can also right-click and choose Properties from the popup menu.)
2. In the General tab dialog, under Options, clear the **Borders** and **Sizable** check boxes. Then click **OK** to return to Frame Layout.
3. Double-click **trFrame2**, and in the Properties dialog box for this frame also clear the **Borders** and **Sizable** options.

When two frames are adjacent, the three options in the General tab dialog (Borders, Sizable, and Scrollable) should be set the same way for both frames.

4. Click **OK** to leave the Frame Properties dialog box, and **OK** again to return to the main window.
5. In the Publication Hierarchy pane, select the root publication, and then the TOC in the Contents pane. Click **Edit Template**  on the standard toolbar to open the Edit Template dialog box.
6. Pass your cursor over the Preview window to confirm the elements in use.

7. Click **Element Setup**, and in the Elements tab dialog, double-click in the In Body column opposite Title. Click **OK** to return to the Edit Template. The Title element is now gone.

This, as we shall see, is just one simple way to clean up the appearance of the main TOC. The use of CSS options will help, too.

8. Click **Globals**, and then click **Options** to open that tab dialog. Click **Allow CSS character and paragraph formatting**. (Note the more limited set of options available in **Globals** when a reference page is selected.) Click **OK** to return to the Edit Template dialog box. Pass your cursor over the Preview window to confirm that the two elements you need to format are Title (System) and Heading 1.

9. Click **Formatting**. The Character tab dialog is open by default. Select **Title (System)** from the Elements list and change the font, size, alignment, and color.

In the Character tab dialog, choose **Arial Black** (or another strong font that is on your machine) from the drop-down list under Font Name. Under Font Size, click **Use this size** and select **Custom** from the drop-down list. Select the default size of 10.00 points and type **12**, to change the font size to 12 points.

Click the **Color** button and select red from the Color dialog box. Click **OK** to return to **Formatting**. Click **Paragraph** to open that tab dialog, and under Alignment, click **Use this alignment** and select **Center** from the drop-down list.

10. Now select **Heading 1** from the Elements list in Formatting and format that, too.

In the Character tab dialog, choose **Arial** from the drop-down font list. Under Font Size, click **Use this size** and select **Custom** from the drop-down list. Accept the default size of 10.00 points that appears below. Click **Effects** to open the Effects dialog box, and select **Always On** from the **Bold** drop-down list.

Click the **Color** button and select a dark gray from the Color dialog box. Click **OK** to return to **Formatting**. Click **Lists** and under Type click **Bulleted List**. Then click the **Bullet** button and select **bevmabl.gif** from Bullets group in the Gallery. Finally, make sure that the check box **Strip input to first blank space or tab** is clear (since there are no bullets already associated with this style, selecting this box would strip the first word of each heading). Then click **OK** to return to Edit Template.

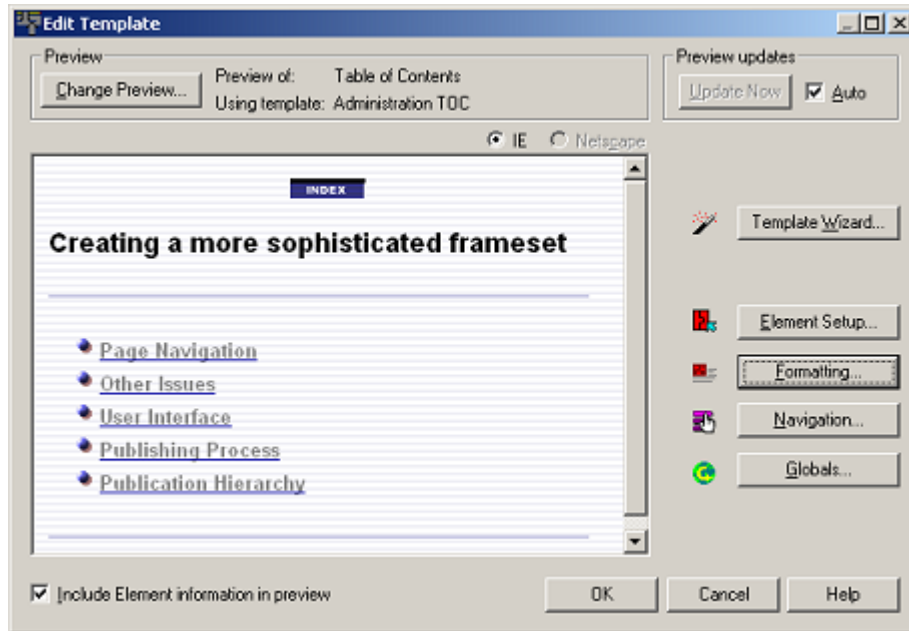


Figure 16-6 The Edit Template dialog box, which is adjustable. When viewing pages with a great deal of content, you might want to click the Maximize button on the title bar so that the dialog box fills your monitor screen.

11. Click **OK** to return to the main window. With TOC still selected, click **Globals**. Open the **Separators** tab dialog and clear the two check boxes for separators before and after. (The separators are default settings for the template.) Click **OK** to return to the main window. See Figure 16-6.
12. Select **First Page.doc** and click **Globals** again. Click **Colors**. Under Background Colors, clear the **Use a background graphic** check box (another default setting) and click **Background**. Then click the **Color** button and choose white from the Color dialog box. Click **OK** to return to the Color tab dialog in **Globals**.

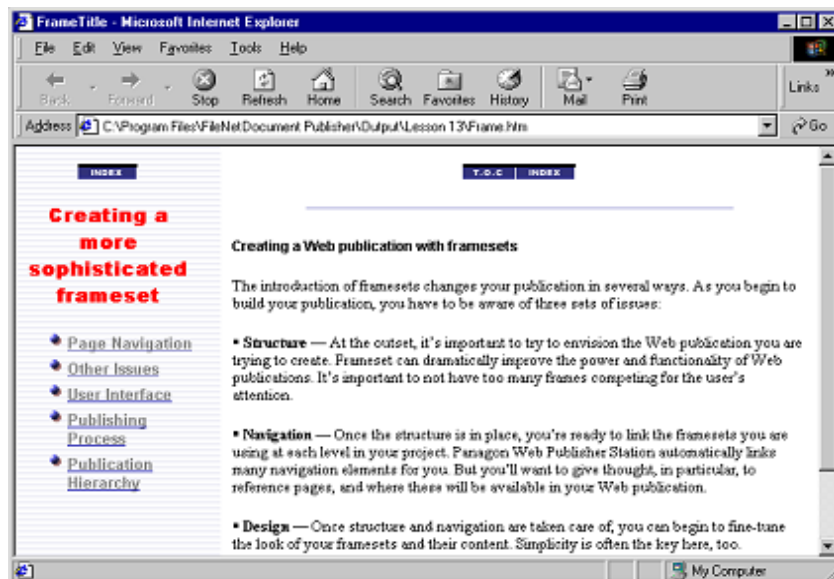



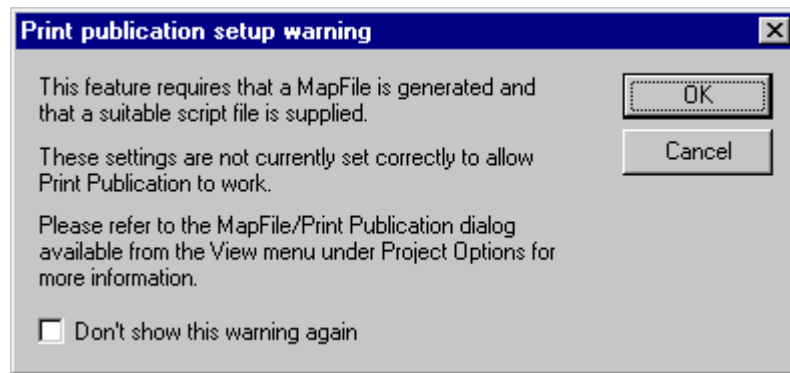
Figure 16-7 The top-level TOC after formatting with CSS turned on. You could format the main frame to make its appearance compatible with the TOC.

13. Translate again, and the top level of your web publication should look like what you see in Figure 16-7.

Add a print button

Document Publisher Station's print functionality is especially powerful when you are using Internet Explorer. With this browser, you can print all or selected portions of a web publication, no matter how large the publication. (With Netscape Navigator, any Print button you add will function in the same way as the Print button on the browser toolbar.)

1. In the Publication Hierarchy pane, select the root publication, and then in the Contents pane, select the top-level TOC. Click **Navigation**  on the toolbar.
2. In the Page Button Bar tab dialog, under Link Type, select **Print** and then double-click in the Before column. The following warning will appear onscreen:



In any new FileNet Document Publisher project, this functionality is automatically turned on by default and you would not get this warning. In fact, the functionality is so simple that when you have added the Print button in **Navigation**, you are done. The functionality has been intentionally turned off here so that we can review the settings for this to work.

Note: Though it will not work just yet, the Print button has been added to the TOC. Click **OK** on this warning dialog box, and **OK** again to return to the main window.

3. From the **View** menu, click **Project Options** to open that dialog box. Click **Map File / Print Publication** to open that tab dialog. See Figure 16-8.

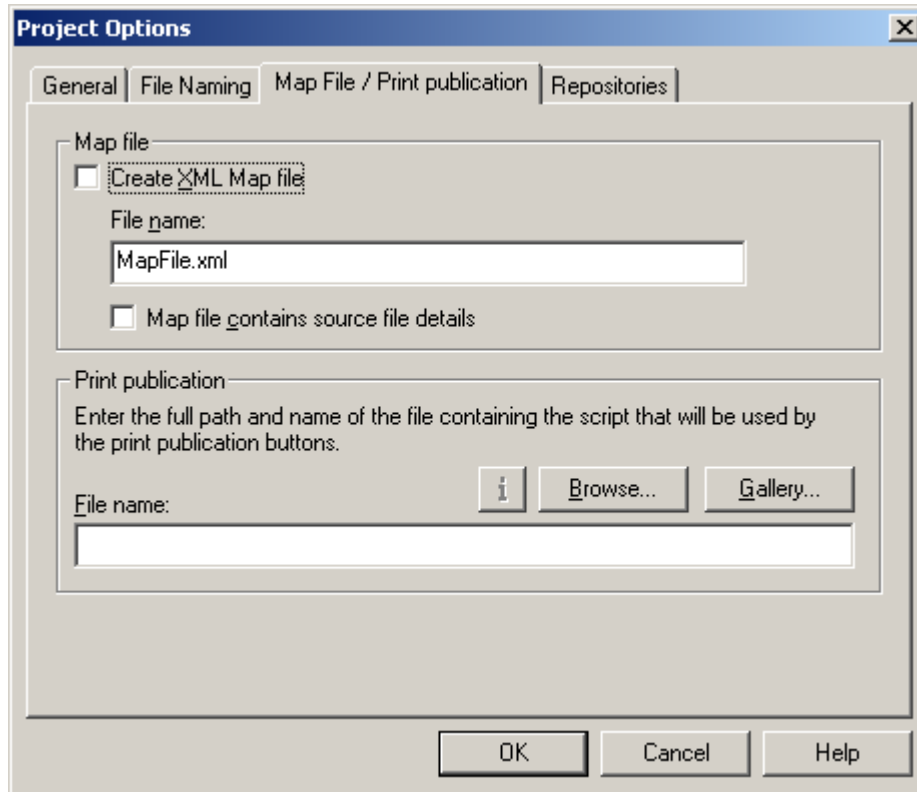


Figure 16-8 The Project Options dialog box, which you open from the View menu. You need to specify both a Map file and a script to enable the print functionality.

4. Under Map File, click **Create XML Map file**. If the default Map file name MapFile.xml isn't already entered in the text box, type the name (or another name) for the file. Document Publisher Station won't generate this file unless you provide a name for it. But it will add the **.xml** extension if you don't.
5. Under Print Publication, click **Gallery** to open the `.\FileNet Document Publisher\Gallery\en`, with the HTML Code subdirectory already open. Select **PrintPublication.htm** and click **OK** to return to the Project Options dialog box. The path and name of the file now appear in the File Name text box.
6. Click **OK** to return to the main window.

You have now completed the three steps necessary to enable the print functionality for your FileNet Document Publisher project: instructed Document Publisher Station to generate an XML Map file, provided a name for the file, and selected a script that will obtain a necessary control from the Stellent Web site (see Tips for more information).

7. Click **Translate** and then **View**. Note that the Print button now appears on the top-level TOC frame.
8. Click **Print**.

If you are using the Print functionality for the first time on your machine, this will activate the script in PrintPublication.htm, with instructions to obtain a file from the Stellent Web site. Click **OK** if a browser security warning should appear onscreen. Shortly, the print functionality will be enabled and the Select Files to Print dialog box will open. See Figure 16-9.

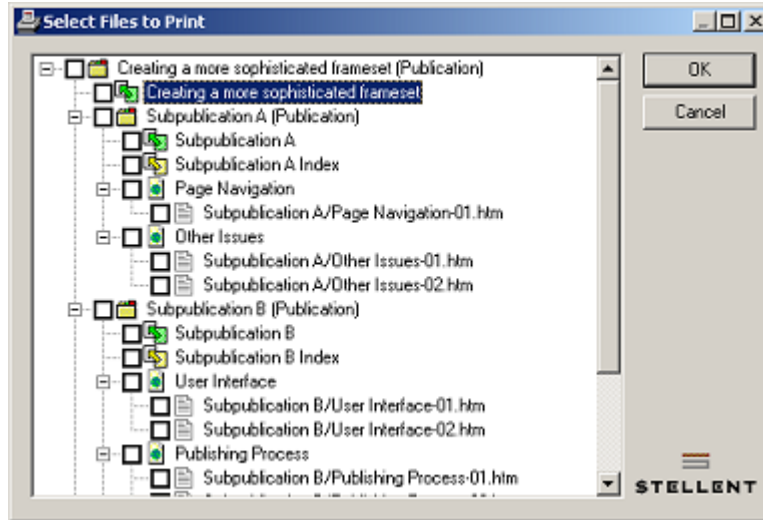


Figure 16-9 The Select Files to Print dialog box, when it first opens.


9. Select the files you want to print and click **OK**.

When the Select Files to Print dialog box first opens, the complete hierarchy of the publication is visible but no files are selected for printing. Clicking a top-level box (publication) automatically selects for printing all files below that level. But you can clear any boxes at the sublevels to deselect a file. In this way, you can, in fact, print any combination of files that you want.

Before leaving the dialog box, scroll down to the end of the list of files and notice the last item: “Creating a web publication with framesets.” This entry is for the source document FirstPage.doc. Where did this title come from? You may want to read Tip 7, at the end of the lesson, before closing the Select Files to Print dialog box.

Name a frameset

When you create framesets for a publication, any instructions set in the Titles tab dialog of **Globals** for the browser title bar are no longer relevant. As we saw in Figure 16-3, what will appear, instead, is the name of the frameset.

1. In the main window, with the root publication selected in the Publication Hierarchy pane, click **Layout**  on the toolbar.
2. Under Active Layout, select Frame Layout, and click the **Frameset Properties** button.
3. In the Frameset Title text box, type **Creating a more sophisticated frameset**.
4. Click **OK**, and **OK** again to return to the main window.
5. Click **Translate** and then **View**.

Note the new title in the browser title bar of the top frameset. Click one of the entries in the TOC, however, to jump to a frameset for one of the subpublications and “FrameTitle” will once again appear.

A couple of thoughts before we wrap up. If you wanted the title “Creating a more sophisticated frameset” to appear in the browser title bar for all framesets, this

would be easy for this particular project. Since the two subpublications mirror the root publication in frameset structure and the content of the frames, you could use the **Copy** and **Paste Special** commands in Frame Layout to copy the revised frameset property into the other two framesets. If you leave the Frameset Title text box empty (step 3, above), the browser will display the path and name of the frameset file (Frame.htm, by default).

Tips

1. How you structure content in the Contents pane is simply a means to an end. It is important to envision how you want your web publication to look like when you are done.
2. In this lesson, for example, we used reference pages to pass elements (and therefore content) from a lower level to the top level. The indexes remained in the project but were not published, because Document Publisher Station does not create empty output pages. (Lesson 17 goes into this in more detail.)
3. As another example, we got rid of the individual source document titles for the top TOC. You would not always want to do this, especially if your publication is complex. But here we were able to simplify the look of the TOC.
4. You might want to review the output directories in Windows Explorer. The root publication uses C:\Program Files\FileNet Document Publisher\Output\Lesson 12 (unless you changed it), which Document Publisher Station created when you first translated the publication. In addition, Document Publisher Station created two subdirectories (.Lesson 12\SubpublicationA and .Lesson 12\SubpublicationB), thanks to the subpublication name in each case also being used for the output name. You do not have to recreate the complete path in the Publication Properties dialog box. Document Publisher Station simply mirrors the publication hierarchy on the output side, using the names of folders you designate at the subpublication level. This can be handy if you choose to change the output directory. You have to change it in only one place: Publication Properties for the root publication.
5. You did not do it for this lesson, but you can, of course, adjust the size of frames in a frameset very easily with your cursor. You can also open the Frame Properties dialog boxes (select a frame and click the **Frame Properties** button) for a more precise measurement.
6. The Print functionality is typically enabled in Document Publisher Station. If for some reason it is not, you saw how a few quick changes in the Project Options dialog box will take care of things. When you use the Print button the first time, Document Publisher Station runs the script to download and install a print control required to enable print functionality. For more information, see online Help. (For example, select the entry “print functionality” from the Index.)

When the Select Files to Print dialog box opens, what you see reflects the contents of the XML Map file, which Document Publisher Station generated when you translated the project. In creating entries for the Map file, Document Publisher Station uses the titles of the different components of your publication as follows:

- **Publications** — From the publication title, as it appears in the Publication Properties dialog box.
- **Reference pages** — From the title as specified in the Titles tab dialog of **Globals**. By default, this would be the publication component (publication title, as set in the Publication Properties dialog box) and the document title (as

specified in the Document Properties dialog box). For the templates in this project, the publication component was turned off (check the Title tab dialog in **Globals**) and only the document component was used.

- **Source documents** — Document Publisher Station uses the Title element in the document. You can confirm this for all source documents in the project by clicking each one and opening the Edit Template dialog box. Most of the source documents have a file name that happens to be the same as the title in the document. The title in the document was created with the Title style. But since documents were added to this project with the default None setting in Choose Template, no styles (or patterns) were imported. The Title rank was applied instead. Since FirstPage.doc has only a single major heading, Document Publisher Station applied Title to that (even though in the source document the heading is in the Heading 1 style).

LESSON 13

Creating hyperlinks in web pages

Much of the navigation in web publications is directly from reference pages to body documents or by means of standard navigation buttons that allow you to scroll from one page to the next or return you to a table of contents or index. Such navigation is easy to set up in Document Publisher Station because most of these links typically are inserted automatically.

But navigation between and within individual documents can often be desirable, too. Many source documents now contain hyperlinks to facilitate movement between source documents. Hyperlinks are simpler to create than cross-references and are potentially more powerful. Document Publisher Station preserves such links when you translate a project and thus allows for their continued use in web publications. (As you will have noticed, these types of links are used quite a bit in the HTML documentation for Document Publisher Station.)

In this lesson, you will review the links that



- Allow jumps between web pages
- Open target documents in their native format
- Open any web site anywhere
- Activate the mailto: option so that you can immediately send a message to any pre-identified addressee

Let us first review the nature of these links in the original source documents.

Reviewing hyperlinks

1. Open **Hyperlinks.tcp** from the ..\FileNet Document Publisher\Samples\en directory.
2. Right-click **Hyperlinks.doc** and choose **Open Source Document** from the popup menu.

If you are running Word, the source document will open in its native format. Scroll down and note the various hyperlinks already entered in this test document. To check any hyperlink, right-click on the link, choose **Hyperlink** from the popup menu and then **Edit Hyperlink** from the submenu. The Hyperlink dialog box in Word will open.

3. Close the source document in Word. Click **Translate**  on the toolbar, and then click **View** . See Figure 17-1.

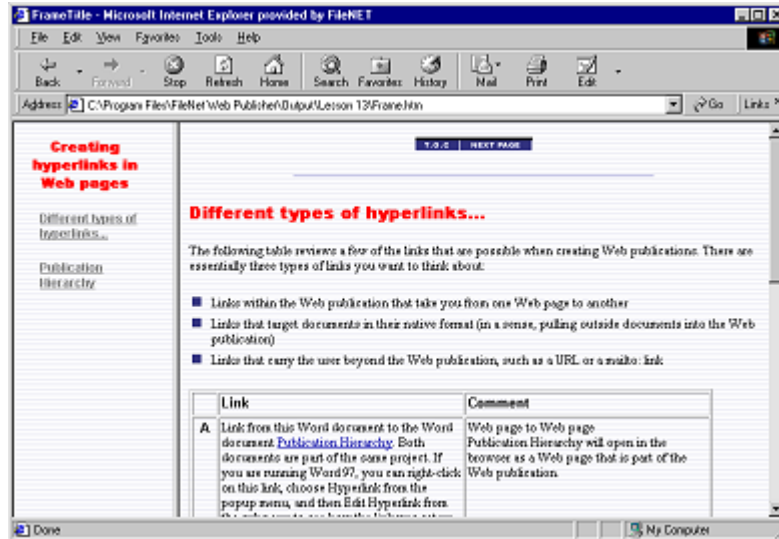


Figure 17-1 The source document *Hyperlinks.doc* contains some of the more obvious types of hyperlinks you might want to create in your source documents and have preserved in the output pages that *Document Publisher Station* creates.

4. Scroll down the main web page and click each hyperlink, in turn.

Let us review the different types of links in *Hyperlinks.doc*.

Note: The behavior of these links may vary between browsers.

Links A and B are typical links where the source document and the target document are both part of the same project. As a result, clicking the source takes the user directly to the web page that was created from the target document. Link B is a little more subtle in that it takes the user directly to a specific place (heading) in the target document—thanks to a bookmark that has been placed there. If links are successfully created between source documents, *Document Publisher Station* takes care of the rest and ensures that they are preserved in the output HTML pages.

Link C is a little different. Here, since the target document is not part of the project, *Document Publisher Station* will not create a web page from the document. But it will still preserve the link, if it can. This will not be difficult because the target file has been made an “associated file” in the project. *Document Publisher Station* “passes through” associated files and makes them available on the output side. The original file is in `C:\Program Files\FileNet Document Publisher\Samples\en\Styled`.

Note: If you are using Netscape Navigator, the target file likely will open in Word; if you are using Internet Explorer, it will open in the browser window (with the target document in its native format, nonetheless).

Link D should not work! That is, the target document is not in the project and the link contains a relative path that *Document Publisher Station* cannot find. This type of link (like Link C) is an ideal candidate for the “associated file” feature in *Document Publisher Station*, which we will look at shortly.

Link E is a standard hyperlink to a URL that is easy to set up in your source document and which *Document Publisher Station* preserves without difficulty. You can jump to any URL anywhere, as long as the URL is valid.


Link F is also a standard hyperlink, this time designed to open your e-mail program with a specified addressee already set up for mailing. This link will only work, however, if your browser has an email option associated with it.

Link to an associated file

Let us make Link D work.

The target document for Link D is Other Issues Copy.doc, which resides in the ..\FileNet Document Publisher\Samples\en\Other directory. The goal is to place this file in the output directory where the output files for Hyperlinks.doc are to be found — namely, C:\Program Files\FileNet Document Publisher\Output\Lesson 13. By doing this, your browser will be able to find the file and open it.

You could move this file manually, by locating it in Windows Explorer, making a copy, and placing that copy in the appropriate output directory. A far better way is to make the file an “associated file.” As such, it will become an integral part of the project file and will be referenced by it.

1. In the main window, click **Associated Files**  on the standard toolbar to open the Associated files dialog box.
2. Click the **Add** button to open the Open dialog box. Locate and select **Other Issues Copy.doc** in the ..\FileNet Document Publisher\Samples\en\Other directory and click **Open**. The file is now listed in the Associated Files dialog box. See Figure 17-2.
3. Click **OK** to close the dialog box.
4. Then select Hyperlinks.doc in the Contents pane and click **Globals** to open that property sheet. Click **Options** to open that tab dialog, and select **Strip path from external hyperlinks**.

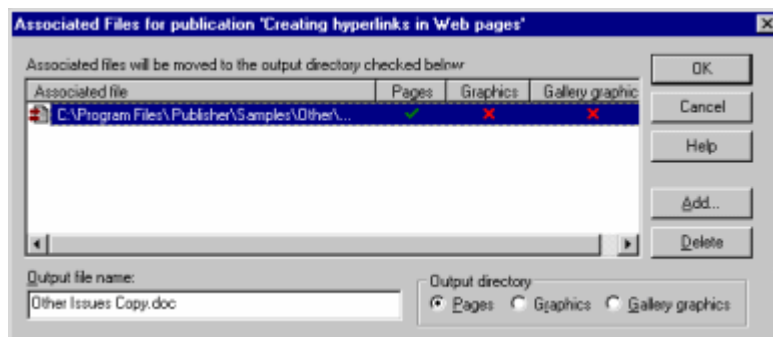




Figure 17-2 Other Issues Copy.doc has been added to the root publication as an associated file. Document Publisher Station will make a copy of the file when you translate and place the copy in the Pages output directory.

5. Click **Translate**  and then **View** . Now try Link D. It should open the Word document (in the browser, if you are using Internet Explorer; in Word, if you are using Netscape Navigator).

Tips

1. You may need to experiment to see what hyperlinks are possible with different types of source documents and also different settings for those hyperlinks.
2. As you build your projects and use ASP, Java, or graphics files that will eventually reside on your Web server, you should make use of the Associated Files feature. In this way, you do not have to remember to copy them to the

Web server each time—Document Publisher Station copies them to whatever output directories you are using for your translated or published output. You can also use the pass-through option for a Directory Item to handle associated files, since that option allows you to pass through files in their native format. For more information, see “Passing through source documents without conversion” in the Help system.

3. If you have an associated file that is referenced by several publications in your project, you will have to add it to the Associated Files list for each publication. However, if you specify an output directory for Gallery Graphics (in the Publication Properties dialog box for the root publication), you can place it in the Gallery Graphics directory when you add it to each of the Associated Files lists. That way, only one copy of the file will be made. (The Gallery Graphics output directory can be used for any associated files, not just graphics.)

LESSON 14

Creating a publication hierarchy

One of the most powerful features of Document Publisher Station is the ability to create a *publication hierarchy* consisting of the root publication plus additional publications at different levels below the root. A typical publication hierarchy might look like the one in Figure 18-1. This reflects a particular corporate structure, and could very well represent the structure of a proposed web site.

Publications can have long names—the more descriptive, the better. A publication, after all, is simply a container for the source documents you want to translate. Think of the root publication as the title of a conventional book and all the other publications as chapters or sections in the book. So the value of the publication hierarchy resides, initially, in your ability to structure your web publications so that the information published on your web site accurately reflects your organization's structure—or whatever it is you are seeking to communicate.

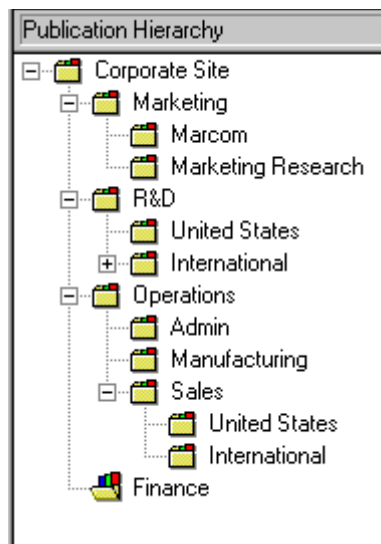


Figure 18-1 A typical publication hierarchy you might create for your web site if you were seeking to capture organizational structure. You can manipulate individual publications in the hierarchy to change their order or the level at which they reside.

Once you have created a publication hierarchy, you are ready to populate each publication with the source documents you want to translate. The publication hierarchy—in effect, the complete project represented by what you see in the Publication Hierarchy pane plus the source documents in each publication in a given order—becomes increasingly important the greater the amount of information you seek to publish. This is especially so as you add navigation buttons and create reference pages, because this structure determines the potential flow of information on your web site.

Note: The entire publication hierarchy is never visible at any time. While the Publication Hierarchy pane displays the hierarchy of publications (in expanded or contracted form), the Contents pane displays only the contents of whichever publication in the Publication Hierarchy pane is currently selected.

When you start a new project, you always begin with a root publication. There are several ways to add publications to create the publication hierarchy. In this lesson,

you will see how easy it is to create—and restructure—the hierarchy. In the next lesson, you will learn how to add content to a publication, using a special feature in Document Publisher Station.

So in this lesson, you will

- Create a project file
- Add publications to the root publication
- Change the structure of the publication hierarchy
- Move publications between two instances of Document Publisher Station


Note: Much of what you will learn in this lesson about manipulating publications in the hierarchy is akin to working in Windows Explorer. You can rename, copy, and paste publications in the Publication Hierarchy pane just as you can rename, copy, and paste folders in Windows Explorer. Unlike Windows Explorer, however, you can decide the order in which the publications appear.

Create a project file

1. Open Document Publisher Station.
2. In the Publication Hierarchy pane, click “**Unnamed**” twice, with a pause between clicks. In the edit box that appears, type **Corporate Site** for the name of your new root publication. Press **Enter**.
3. From the File menu, choose **Save As**. In the File Name text box, type **Corporate.tcp** and save the project file in the `..\FileNet Document Publisher\Samples\en` subdirectory.

You have created the project **Corporate Site** and saved it to the project file **Corporate.tcp**.

Add publications to the root publication

1. You can add publications in several ways. Try all of the following:
 - Click **Add Publication**  on the standard toolbar or the large toolbar.
 - Choose **Publication** from the **Add** menu.
 - Right-click **Corporate Site** in the Publication Hierarchy pane and choose **Add** and then **Publication** from the popup menu.

In each case, the Add Publication dialog box opens.

2. Type **Marketing** in the Name text box. Note that the name is automatically inserted in the Publication Title text box and also used for both the Pages and Graphics output subdirectories. Click **OK**.

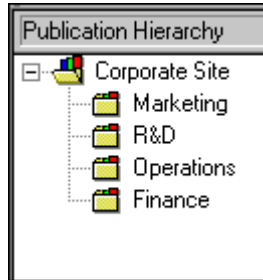
As you can see, Marketing is now a subpublication of Corporate Site, which has acquired a “minus box” before it. Click the box to contract the publication hierarchy (and turn the minus sign into a plus sign). Click the box again to expand the hierarchy.

3. Repeat steps 1 and 2 to add publications named **R&D**, **Operations**, and **Finance** to the root publication. Make sure you select Corporate Site each

time, or each new publication you create will become a subpublication of the previous one created.

4. Click **Save**  on the toolbar.

You have now created a simple publication hierarchy for the project Corporate Site, with all the subpublications at the same level, immediately below the root publication. And you have saved the publication hierarchy in the project file Corporate.tcp.



Change the structure of the publication hierarchy

With this simple structure, you can easily move publications around, the same way as you do folders in Windows Explorer. But Document Publisher Station gives you added flexibility. Let us say in our example you want to move Finance in relation to R&D.

1. Right-click **Finance** and drag it over **R&D**. When Finance is highlighted, let go of the mouse.
Two things will happen. Finance will revert to its original order in the publication hierarchy and a popup menu will appear.
2. From the popup menu, choose the appropriate command: Move Before, Move After, or Move Into.
3. The popup menu disappears and Finance is now before or after R&D in the hierarchy (or has become a subpublication of R&D, if you chose Move Into).

That is how easy it is to move publications in the hierarchy. Remember: you can drag and drop source documents in the Contents pane to change the order of those, too.

Like Windows Explorer, you can display and hide a particular level of publications by clicking the box to the left of the publication at the next level up. (In this case, only the root publication has a box.) Alternatively, you can right-click a publication and choose Tree and then Expand All or Contract All from the popup menu. Or you can simply double-click the publication icon to expand and contract its contents.


Move publications between two instances of Document Publisher Station

Once you start creating publications in Document Publisher Station, you will probably have occasion to move publications between projects. One way is to export a publication from one project and import it into another. (In the first project,

select the subpublication you want to export, click Export Publication on the File menu, and save the subpublication as a project on your file system. In the second project, select the root publication or a subpublication, and click Import Publication. Once you import the project, it immediately becomes part of the second project.)

An even simpler way, however, is to have both projects open at the same time in separate instances of Document Publisher Station, and then to use the Copy and Paste commands to copy a publication from one instance of Document Publisher Station into another.

Let us do that. You could open another project file from the Tutorial, but instead:

1. Choose **Save As** from the **File** menu, and save the project file under the name **Company.tcp**. You now have two identical project files, with the second open.
2. Change the names of the four existing publications to Communications, Legal, Manufacturing, and Accounting. (Left-click each publication twice, with a pause between clicks, to rename each publication in the edit box that appears.)
3. Click **Save**  to save **Company.tcp**.
4. Start a second instance of Document Publisher Station. That is, from the **Start** menu, choose **Programs**, and then choose **Document Publisher Station** from the Document Publisher Station program group.
5. In the second instance of Document Publisher Station, open **Corporate.tcp**, the original project file you created (it should be in your `..\FileNet Document Publisher\Samples\en` directory).
6. In the Publication Hierarchy pane of Corporate.tcp, right-click one of the publications (say, Marketing), and choose **Copy** from the popup menu.
7. Move the mouse over the first instance of Document Publisher Station and click the main window to activate that instance of the application (or click the appropriate button on the Windows taskbar to activate the program).
8. Right-click Communications, and from the popup menu choose **Paste**.

A copy of the Marketing publication from Corporate.tcp has now been pasted into the Communications subpublication of Company.tcp, and so has become a subpublication of Communications.

Had you pasted Marketing into Corporate Site, instead, Marketing would have become part of the publication hierarchy at the same level as Communications.

Note: When you copy a publication from one project to another, typically the Project Paths Verification dialog box will appear. This happens because, in copying a publication, you bring information in the project file with the publication, including paths for source documents and other files, some of which likely will change. Document Publisher Station must confirm this information before copying the publication into the existing project.

Tips

1. A publication hierarchy can be set up very easily in Document Publisher Station, and you can manipulate the publications in the hierarchy just as you do folders in Windows Explorer.
2. Your right mouse button will help you quite a bit when you start changing the structure of the publication hierarchy, thanks to the special popup menu that appears when repositioning publications.

3. Copying a subpublication from one project to another can be as easy as in the example above, with two instances of Document Publisher Station open.
4. When copying a publication from one project to another, you may encounter a message about overwriting templates. This will occur if the project you are copying a publication into uses the same template as the publication being copied. In that event, you will have to rename the specified template you are importing. But you can always re-associate a template with the source documents of the imported publication afterward.

LESSON 15

Adding Directory Items

A Directory Item is simply a directory (folder) on your file system that you add to a publication in a project. You can specify the file types in the folder to be included in your publication. When you use the Update Versions command before translation, Document Publisher Station recognizes new documents added to the folder and produces output pages for the current contents of the folder.

You can automate the Update Versions command. As a result, once you identify the directory and file types, you can drop files of the specified types into that directory at any time and they will be included in the next translation. The Directory Item may be especially useful where content providers throughout an organization are charged with periodically handing off revised source documents to be translated at a scheduled time each week, say.

You can, in fact, add a Directory Item in one of two ways. You can

- Add a *single* Directory Item by using the Directory Item command on the Add menu
- Add *several* Directory Items at the same time by using the Folder Import wizard that lets you add a portion of your file system to your publication hierarchy (see Tip 4)

In this lesson, you will

- Add a single Directory Item to a project
- Set translation options for that Directory Item
- Use the Folder Import wizard to import a portion of the file system

Note: You can also add a *dynamic* Directory Item to a publication. See “Creating a dynamic Directory Item,” at the end of this lesson.

Add a single Directory Item to a project

1. Open **Corporate.tcp**, the project file you created in Lesson 14. (If Company.tcp is still open in a second instance of Document Publisher Station, close that instance of the application.)
2. In the Publication Hierarchy pane, select **Marketing**, and then choose **Directory Item** from the **Add** menu, to open the New Directory Item Properties dialog box (see Figure 19-1).

The Directory Item command is also available from the popup menu that appears when you right-click a publication in the Publication Hierarchy pane.

3. Enter the path and name of the directory you want to add to the publication. Use the Browse button, if necessary, to locate the desired directory.

Figure 19-1 shows the Styled folder for the ..\FileNet Document Publisher\Samples\en\Styled directory. But you can pick any directory for the purpose of this lesson.

4. In the Title text box, enter a name for the directory.

This name can be used to create a title for your web pages (see the Titles tab dialog in **Globals**). It will also appear on the title bar of the Properties dialog box once you exit the dialog box and then return to it again.

5. In the **Include files matching the following specification only** text box, enter the extensions for the types of files you want to translate.

You can enter more than one extension. Separate multiple extensions with a semicolon, thus: ***.doc;*.txt**. And you can use file names to control the files you translate; for example, **Sales*.doc** would result in Document Publisher Station translating such files as SalesQ1.doc and SalesQ2.doc.

6. In the **Map file property** text box, enter any information you want to appear in the Directory element in the XML Map file that Document Publisher Station generates when it translates the project. See “Map file” in the Help system for more information.

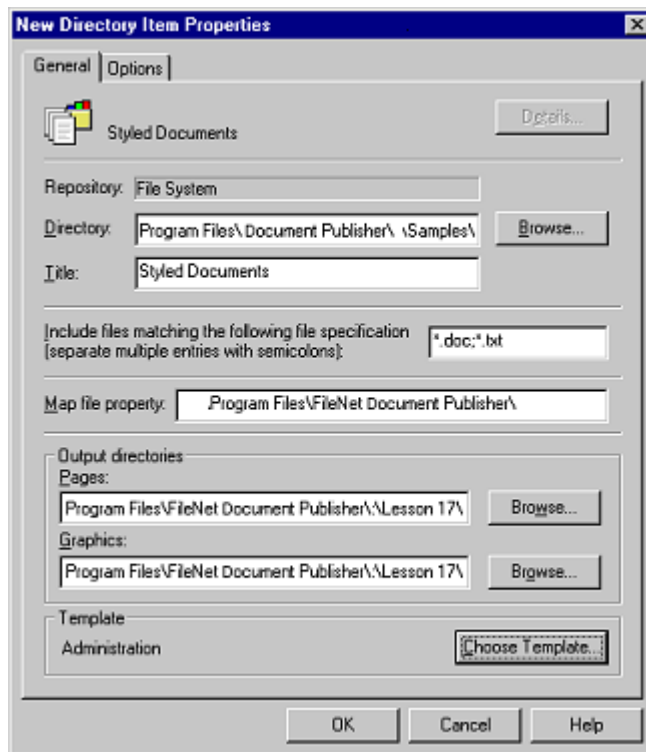


Figure 19-1 The New Directory Item Properties dialog box. On the Options tab dialog you can refine the translation order of documents.

7. In the **Prefix to be added to all output file names** text box, enter the prefix to apply to each output file in this Directory Item. See “Adding a prefix to output file names” in the Help system for more information.
8. Under Output Directories, enter the paths and names of the directories you want to use for the translated files. You can use different directories for output pages and graphics files, and you can enter a directory that doesn’t exist. (Document Publisher Station will create the directory when it translates the files, assuming the directory can be created.)
9. Under Template, click **Choose Template**, to open the Choose Template dialog box. The Documents box in this dialog box lists all the documents currently in the selected directory that have the specified extension. A temporary translation of the first document on the list will display in the Preview window if

the Auto button is checked. Pick the template you want to associate with the documents.

Note the default setting None under Import Styles or Patterns. (This is the default for all templates and should have been used when you created Corporate.tcp.) With this default, Document Publisher Station assigns ranks to the top-level content of source documents, as opposed to importing styles or patterns from those documents. Ranks can be especially effective with Directory Items because multiple source documents added at different times may have varied and inconsistent formatting. (For more on ranks, see Lesson 9, "Handling ranks, styles, and patterns.")

10. Click **Sort** to switch to that tab dialog. Under Sort Order, select **Ascending**. Under Sort By, select **Document Name**.
11. Click **OK** to return to the Properties dialog box, and **OK** again to return to the main window.

The Contents pane now has a single entry for the Directory Item you have just added to the Marketing publication (see Figure 19-2). Only *.htm displays in the Output column (it will be repeated if you specify more than one file type). When Document Publisher Station translates all files in this directory, it will name them after the original file names, except for the change in extension. The path that displays in the Source column includes all the extensions specified.

Note: The extension used will be the default output extension specified in the Application Options dialog box.

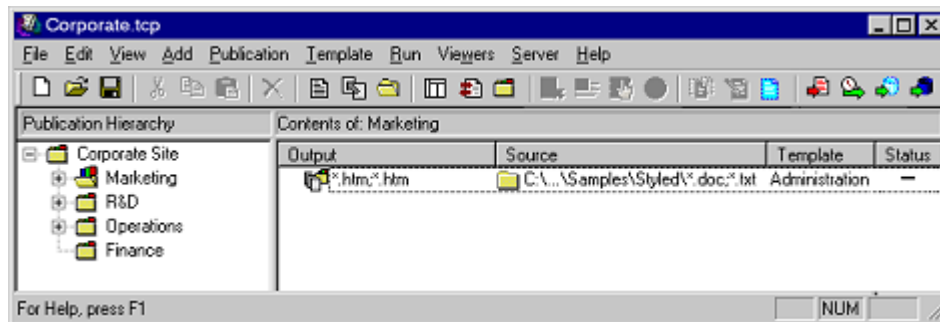



Figure 19-2 The Contents pane for the Corporate Site publication with a Directory Item selected for Marketing. (The large toolbar is hidden here.) Since source documents could be added to the directory at any time, the Status column is always blank.

You might care to translate the publication now and check a couple of things. If so, check the output directories in the Publication Properties dialog box for the root publication. Since we have not previously translated this project, you should find that the directory for both Pages and Graphics is:

C:\Documents and Settings\\My Documents\FileNet Document Publisher\Output

Whichever applies to you is the default output directory for all new projects in Document Publisher Station. For the purposes of this lesson, you might want to change it to **C:\Program Files\FileNet Document Publisher\Output\Lesson 15**.

Now click the **View**  button to view the results. If you used the Styled directory in `..\FileNet Document Publisher\Samples\en`, the first output page to open will be for **First Page.doc**, the first file listed alphabetically in that directory. All the files

will be linked because of the default navigation buttons set in the template you chose.

You might also care to check the output in Windows Explorer. Document Publisher Station will have created an output directory per your instructions in the Properties dialog box.

Set translation options available for Directory Items

Now return to Document Publisher Station.

1. In the Contents pane, right-click the Directory Item and choose **Properties** from the popup menu.

The Properties tab dialog opens. This is the same as the New Directory Item Properties dialog box, except that the title bar reads “Styled Documents Properties” (assuming you gave the Directory Item the title “Styled Documents” when you first used the dialog box).

2. Click **Sort** to open that tab dialog.

Here, we can set translation details to control the order in which source documents are translated and therefore the order in which they will appear in your browser when you scroll through the web publication using the Previous Page and Next Page navigation buttons.

3. In the Sort tab dialog, under Sort Order, select Ascending or Descending. The sort order is determined also by what you select in step 4. If you choose Document Name there, Ascending means that Document Publisher Station will translate the documents in the directory alphabetically, from A to Z.
4. Under Sort By, select the appropriate radio button for document name, document size, or document date and time.
5. Click **Options** to switch to that tab dialog. Under Conversion Options, select **Pass through files matching the following specification** if you want any documents in this Directory Item to be passed through to the output folder in their original format, retaining the original file name and extension. Enter the file types to pass through (such as ***.pdf;*.avi**) and select an output directory. If you are interested in this option, see “About pass-through conversion” in the Help system for more information.
6. If you want to change the extension for all output pages, you can enter the new extension in the **Output page extension** text box. For example, you might want to use **html** instead.

Note: This extension will be used only for the output pages generated from source documents in this directory, and *only* for new source documents added to the Directory Item *after* the change is made.

7. You might care to experiment here, changing the options, retranslating, and then checking the order of the output web pages in your web publication.

Remember: as with other Properties dialog boxes, you can edit the properties of a Directory Item at any time by right-clicking the item in the Contents pane and choosing **Properties** from the popup menu.

Use the Folder Import wizard

With the Folder Import wizard, you can import a portion of your file system hierarchy directly into the publication hierarchy of your project. You will have to specify the same file type extensions for all folders imported, as well as the same template for all source documents in those folders. But once you import the folders, you can edit individual Directory Items for file types and templates.

1. In the Publication Hierarchy pane, select **Finance**, and then choose **Import** from the **File** menu. The Folder Import wizard opens.
2. In the opening screen of the wizard, enter the root folder in the text box, or click **Browse** to open the Browse for Folder dialog box to locate the root folder you want to add to the Finance publication.
3. Locate **Samples\en** in the **..\FileNet Document Publisher** directory and select that as your root folder.

Note: Although you are adding the Samples folder, as well as all folders beneath the selected folder in the file system hierarchy, you won't see the folder name once you import it. However, any individual files in the root folder (or placed there in future) will be translated by Document Publisher Station.

4. Click **Open** and then **OK** to return to the Folder Import wizard, where the path to the root folder now appears in the Root Folder text box. See Figure 19-3.



Figure 19-3 The opening screen of the Folder Import wizard, with **..\FileNet Document Publisher\Samples\en** already set up as the root folder.

5. Click **Next** to open the Select Import Method screen.

Note your two options here, under Import Method. The default Import Directory Items means that Document Publisher Station will treat each imported folder as a Directory Item. Document Publisher Station will translate whatever source documents are in these folders at the time of translation (if you choose Update Versions before you translate). If you select Import Documents, Document Publisher Station will import those documents currently in the folder (according to the file formats specified in the Wildcards text box).

6. Accept the default **Import Directory Items**, and in the Wildcards text box type ***.doc;*.txt** (note that you separate multiple entries with a semicolon). Then click **Next**.

7. In the Conversion Options screen, select **Pass through files matching the following specification** if you want any documents in this Directory Item to be passed through to the output folder in their original format, retaining their original file name and extension. Enter the file types to be passed through (such as ***.pdf;*.avi**) and select an output directory. Then click **Next**. If you are interested in this option, see “About pass through conversion” in the Help system for more information.
8. In the Choose a Template screen, select a template from the drop-down list. Then click **Next**.
9. The Ready to Import screen shows a summary of your decisions. To change any of the information, you can click **Back**.
10. Click **Finish**. Document Publisher Station will import the specified portion of your file system into the Finance publication in the publication hierarchy. See Figure 19-4.

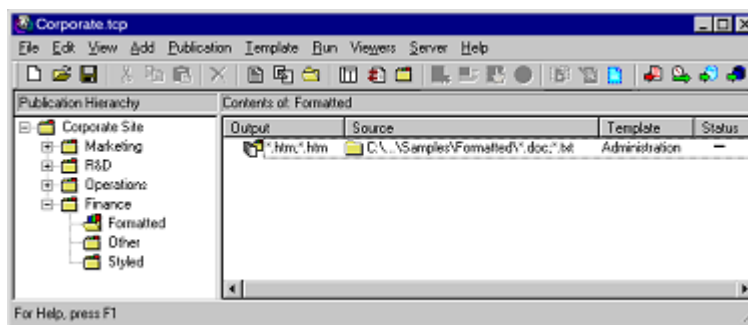


Figure 19-4 The Finance publication with one of the three Directory Items imported with the Folder Import wizard showing in the Contents pane.

Tips

1. You must use the same template for all source documents in a Directory Item. But after you import multiple folders by using the Folder Import wizard, you can change the template for any individual Directory Item in the Properties dialog box for that Directory Item.
2. Likewise, you can also change the Wildcard selection at any time, as well as translation options.
3. The Folder Import wizard imports the root folder, too—even if it is empty at the time. You will not see the name of the root folder in the publication hierarchy, but Document Publisher Station will create a Directory Item (click Finance in the Publication Hierarchy pane). Any documents added at the root level in future will be translated just like those documents in the subdirectories.
4. Yet another way to import a publication hierarchy from the file system is by creating a dynamic Directory Item. You make this selection on the Options tab dialog of the New Directory Item Properties dialog box when you first create a Directory Item. (See the next section.)

Creating a dynamic Directory Item

When you add a Directory Item, 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 are added to the project. That is, you create a Directory Item in the usual way, as explained in the above lesson. However, if you select **Include sub-directories**, 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

1. Only the parent Directory Item is visible in the Contents pane.
2. Document Publisher Station in effect creates a hidden subpublication for the subfolders of the parent Directory Item. The subpublication inherits the properties of the publication in which the dynamic Directory Item resides.
3. 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.
4. 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.
5. Document Publisher Station includes in translation any new subfolders added to the hierarchy in the future. You must update the dynamic Directory Item before you translate (the Update Versions dialog box opens for you to do this).

LESSON 16

Creating TOCs at different levels


As you build a publication hierarchy, navigation becomes increasingly important, especially if there are several levels of subpublication in the project. Adding a Table of Contents at each level, and linking the TOCs, is one way to help readers find their way around a complex web site.

In this lesson, you will

- Create a master TOC for the root publication
- Create a TOC for each subpublication
- Edit the master TOC for the root publication
- Edit the TOC for the subpublications


You tackled some of these tasks as you completed Lesson 12, “Creating a more sophisticated frameset.” But it is worth revisiting key points here.

Create a master table of contents

1. Open **Corporate.tcp** and return the project to its original form by deleting any content in the subpublications.
2. In the Publication Hierarchy pane, select **Corporate Site** and click **Add Reference Page**  on the standard toolbar to open that dialog box. (You can also right-click the root publication and choose **Add** and then **Reference Page** from the popup menu.)
3. Under Type, select Table of Contents. In the Name text box, type **Master TOC**. And from the Template drop-down list, select **Executive TOC**.
4. Click **OK** to return to the main window.

You have now created a master TOC for the publication as a whole.

Create a TOC for each subpublication

1. In the Publication Hierarchy pane, select **Marketing** and click **Add Reference Page**  from the toolbar to open that dialog box.
2. Under Type, select Table of Contents. In the Name text box, accept the default Table of Contents. And from the Template drop-down list, select **Analysis TOC**.
3. Click **OK** to return to the main window.
4. Repeat steps 1 through 3 for the other three subpublications.

Note: you have selected a different TOC template for the subpublications. As you will see when you translate, the two templates are not compatible, but looks do not concern us here. What is important is that different templates

allow us to edit the master TOC *separately* from the TOCs used for the subpublications.

5. Select **Corporate Site** in the Publication Hierarchy pane, and note the display of TOCs in the Contents pane (see Figure 20-1).

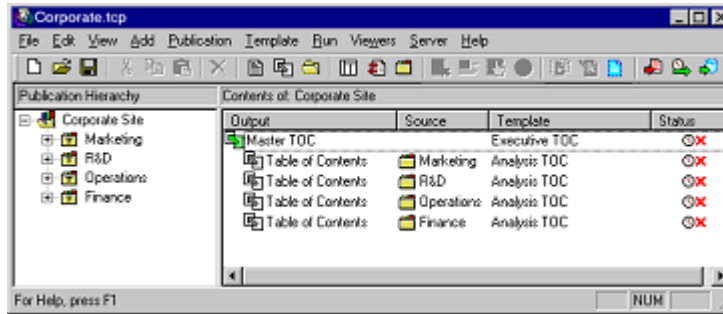





Figure 20-1 The initial setup of a master TOC and a TOC for each subpublication.

Let us create some content for our subpublications.

1. In the Contents pane, select **Marketing**, and click **Add Document**  on the toolbar.
2. Select **Other Issues.doc** from the `..\FileNet Document Publisher\Samples\en\Styled` subdirectory, and click **Open**.
3. In the Choose Template dialog box, accept **Academy** as the template associated with the document, and select **Styles** under Import Styles or Patterns. You may want to turn off the Auto check box under Preview Updates, since you will not need it for this lesson.
4. Click **OK** to return to the main window.
The source document has nothing to do with “marketing,” but it will serve our purpose here.
5. Repeat steps 1 through 4 for the other three subpublications, adding one source document to each subpublication, all from `..\FileNet Document Publisher\Samples\en\Styled`: Page Navigation.doc, Publication Hierarchy.doc, and Publishing Process.doc.
6. You are about to translate the project, but before you do you might want to open the Properties dialog box for the root publication and change the output directories. If you changed these for the previous lesson, you are probably using `C:\Program Files\FileNet Document Publisher\Output\Lesson 15`. You might want to change it to `..\Lesson 16` for both pages and graphics.
7. Accept all defaults settings in the reference pages. Click **Translate**  on the standard toolbar. Once the translation is complete, select **Master TOC** and click **View** .

Your master TOC should look like what you see in Figure 20-2.

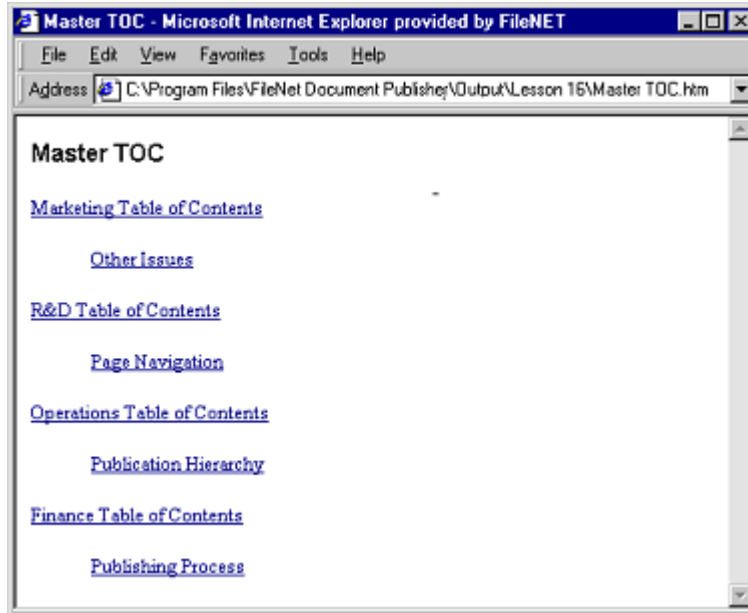


Figure 20-2 The master TOC translated with the default settings.

8. Click **Marketing Table of Contents**, the first entry in the master TOC, to jump to the TOC for the Marketing publication. Figure 20-3 displays what you should see in your web browser.

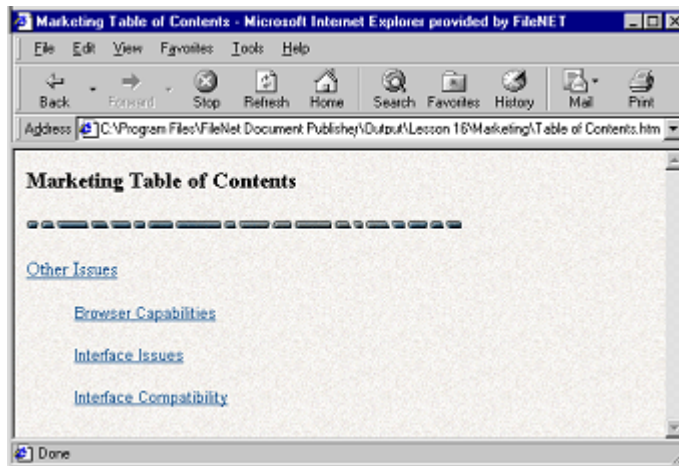



Figure 20-3 The TOC for the Marketing subpublication, again from translating with the defaults accepted for the template.

As we look at the two TOCs, it's clear that they could be improved with some quick editing. The master TOC possibly needs only single jumps to the other TOCs, which also could be simplified.

Edit the master TOC for the root publication

1. In the Publication Hierarchy pane, select **Corporate Site**.

- In the Contents pane, select **Master TOC** and click **Element Setup**  on the toolbar. The Elements tab dialog should appear as you see it in Figure 20-4.

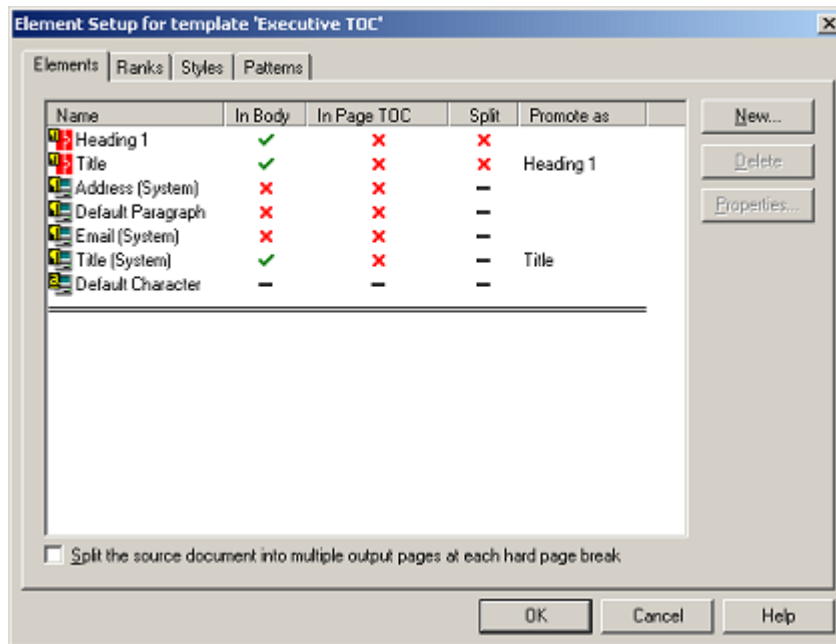



Figure 20-4 The Elements tab dialog in Element Setup for the master TOC, showing the standard defaults for including elements in any reference page template.

Note the three elements included in the body of the master TOC: Title (System) resulted in “Master TOC” in the web page (Figure 20-2), Title resulted in “Marketing Table of Contents” and other similar entries, and Heading 1 produced “Other Issues” and like headings.

(You can quickly confirm this by temporarily leaving Element Setup and opening the Edit Template dialog box with Master TOC still selected. As you pass your cursor slowly over the Preview window, screentips will highlight the elements in use.)

- To simplify the Master TOC, select **Heading 1** and double-click the green check mark in the In Body column to turn it into a red cross. Now click **OK** to return to the main window.
- With the Master TOC still selected, click **Globals**  on the toolbar, and then **Titles**, to open that tab dialog.
- Under Title Contents, clear **The publication component** check box. Then click **OK** to return to the main window.

Depending on how you created Corporate.tcp, this may not be necessary. If you gave the root publication the name “Corporate Site,” then in Figure 20-2, the TOC title would have read “Corporate Site Master TOC.”

- In the Contents pane, right-click **Master TOC** and choose **Properties** from the popup menu to open the Document Properties dialog box.
- In the Document Title text box, type **Corporate Site**. Click **OK**.

As an alternative to steps 3 and 4, if you had named the root publication “Corporate Site,” in **Globals** you could have cleared **The document component** check box, instead.

Edit the TOCs for the subpublications





1. In the Contents pane, select the TOC for one of the subpublications and click **Element Setup**  on the toolbar. It does not matter which TOC you select, because they all share the same template.
2. The Elements tab dialog should appear just the same as you saw it for the Master TOC (Figure 20-4), except that the title bar will have changed.
3. This time, select **Title** and double-click the green check mark in the In Body column to change it to a red cross and so remove the element from the reference page. Then click **OK** to return to the main window.
4. In the Publication Hierarchy pane, select **Corporate Site**, so that all the TOCs show in the Contents pane.
5. Select the first TOC, for Marketing.
6. Right-click and choose **Properties** from the popup menu. In the Document Properties dialog box, change the Document Title to **Marketing**.
7. Repeat steps 5 and 6 to change the Document Titles for the other three publications to **Operations**, **Finance**, and **R&D**, respectively.
8. With one of the subpublication TOCs still selected in the Contents pane, click **Globals**  on the toolbar. Open the Titles tab dialog. Under Title Contents, clear **The publication component** check box.
9. Click **OK** to return to the main screen.
10. Click **Translate** . Then select the master TOC and click **View** .

Figure 20-5 shows the web page you should see. Click Marketing and you should jump to a web page like the one in Figure 20-6.

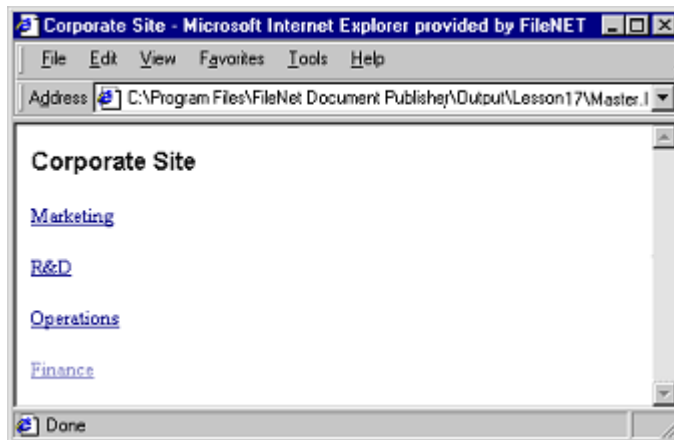


Figure 20-5 The simplified master TOC, after some basic editing.

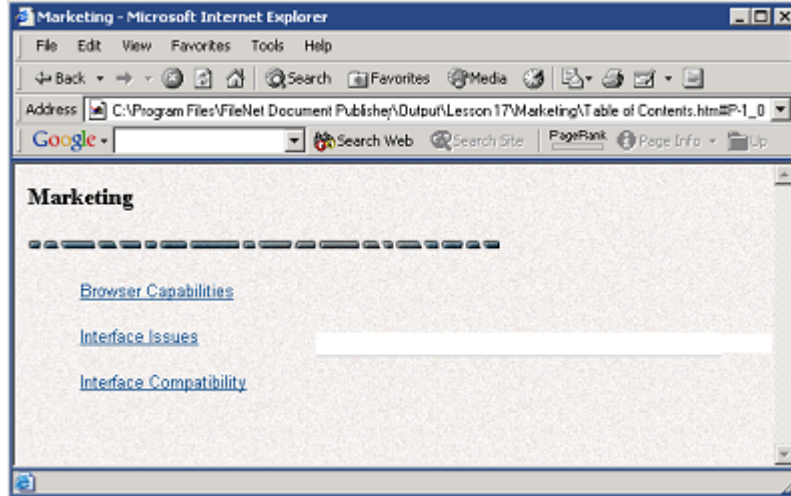


Figure 20-6 The simplified TOC for a subpublication.

Of course, both templates could benefit from some formatting. But structure and content should always precede formatting. This exercise gave us an idea of some simple things we might do to clean up TOCs, especially where you are working with a publication hierarchy and the potential jumps between any one level in the hierarchy and the others begin to multiply.

To sum up

In this lesson you learned how easy it can be to set up reference pages for a publication.

- If you are creating a master TOC, it is important to use a special template just for it, so that you can edit the template differently from the other TOCs in the publication.
- If you want to use the same look for all templates, you can simply create a special master TOC based on the one you are using for the subpublication TOCs.
- Remember the defaults that exist in all reference page templates. Generally, you must promote elements from source documents and formally include them in the specific reference page you are creating. But by default, a TOC always has three elements automatically included: Title (System), Title, and Heading 1.
- Remember, too, the default for titles in the **Globals** property sheet. By default, a TOC always has the publication and document components of the title turned on.

LESSON 17

Promoting elements through levels

Reference pages can help give your web site a sense of structure and purpose. They can also guide readers quickly to the information they seek.

One key to creating useful reference pages in Document Publisher Station is using the “promote” feature. This lets you promote content from the lowest point in the publication hierarchy all the way to the top level. With it, you can decide exactly what content goes into your reference pages. You can even ensure that content from all levels in a publication displays only in the master TOC, created for the root publication. In effect, you use “dummy” TOCs at lower levels to accomplish this.

In this lesson, you will

- Create a simple publication hierarchy with TOCs
- Run a default translation
- Promote an element and remove TOCs
- Edit the template for the master TOC

Create a simple a publication hierarchy with TOCs

1. Start a new project in Document Publisher Station. Use **Promotion** to name the root publication (both the publication name and the publication title) and the project file. Be sure to check the default output directories in the Properties dialog box, and change these, if you want.
2. Add two subpublications to the root publication: Navigation and Publishing.
3. Add the following source documents to each subpublication, all from the `..\FileNet Document Publisher\Samples\en\Styled` subdirectory. Associate the **Business** template with all four documents and select **Styles** under Import Styles or Patterns:
 - To the subpublication Navigation, add Page Navigation.doc and Other Issues.doc.
 - To the subpublication Publishing, add User Interface.doc and Publishing Process.doc.
4. In the Publication Hierarchy pane, select the subpublication **Navigation**. From the menu bar, click **Add -> Reference Page -> Table of Contents**. Associate the **Business TOC** template with the TOC. Do the same for the subpublication Publishing.
5. Now select the root publication **Promotion** in the Publication Hierarchy pane, and add a Table of Contents. Name the TOC **Master TOC** and base it on the **Administration TOC** template.
6. Part of the structure you should now have for the publication hierarchy is shown in Figure 21-1. This is with the root publication selected.

Remember: the Contents pane never shows the complete hierarchy. In Figure 21-1 it shows the contents of the root publication Promotion. If you select Navigation or Publishing, you will see the appropriate TOC for that subpublication plus its two source documents.

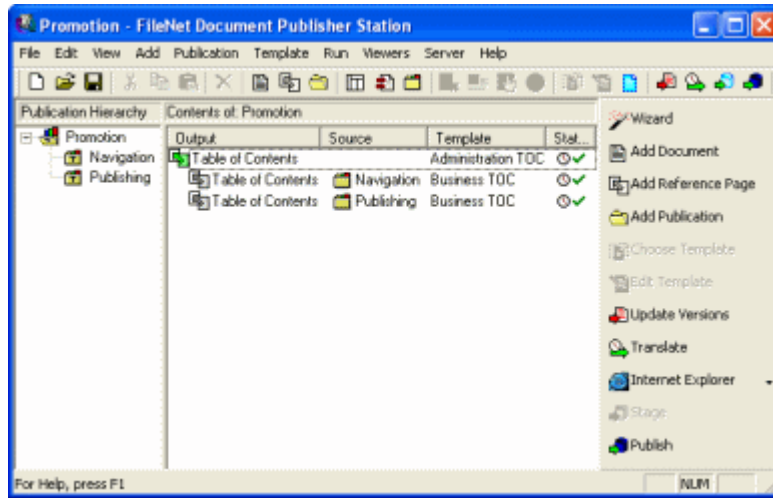




Figure 21-1 The main window with the contents of the root publication Promotion displayed in the Contents pane.

Incidentally, you will have noticed that you associated one template with the TOC for the root publication (Master TOC) and another for the TOCs for the two subpublications. Once you create a publication hierarchy, and have TOCs at different levels, it is generally best to use different templates because you will want to edit the templates for the TOCs differently.

On the other hand, you may want all TOCs to have the same look and feel. You can achieve this by copying and renaming templates. There is no need here, but you could, for example, have created a new template for the Master TOC based on Business TOC. In this way, you would still be able to assign different behavior to the Master TOC versus the other TOCs, while ensuring that all TOCs have the same look and feel. Remember: much of this look and feel actually derives from the graphics Set used, and you can always associate the same graphics Set with templates that have different names (and change graphics Sets at any time).

Run a default translation

Let us run a translation of the publication to see what we get by accepting the default settings in the various templates.

1. Click **Save**  and save the project file to the Samples folder.
2. Click **Translate**  on the toolbar.
3. When the translation is complete, select the **Master TOC** (for Promotion) and click **Preview** on the toolbar.

What you should see in your web browser is shown in Figure 21-2.



Figure 21-2 The web page for Master TOC.

Let us take stock. First, the title is actually two titles in one. As we learned in previous lessons, the default for the title of a TOC is the Publication component plus the Document component. (You can check this by selecting the Master TOC and clicking **Globals** on the toolbar and then opening the Titles tab dialog.)

You can also see that the Master TOC has picked up two levels of information: the titles of the TOCs for the subpublications (again, composed according to the default settings in the Titles tab dialog of **Globals**) and the titles of the source documents (the content associated with the Title element in these documents).

Now click "Publishing Table of Contents" to jump to one of the two other TOCs (see Figure 21-3). This is similar to the Master TOC. But the entries here are for the Title and Heading 1 styles in the source documents.

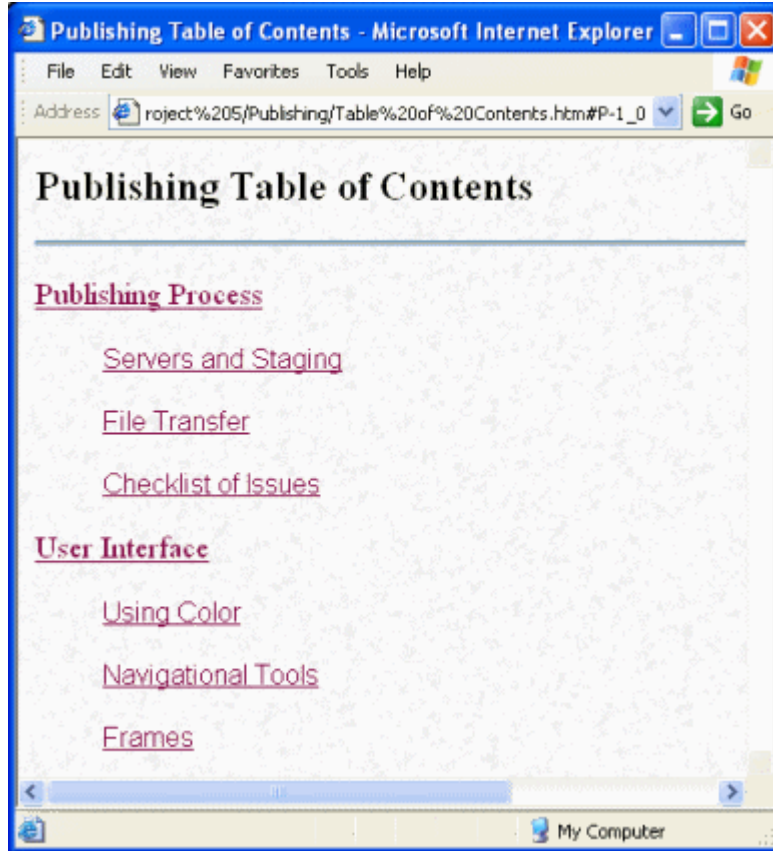



Figure 21-3 The TOC for one of the subpublications.

Promote an element and remove TOCs

To demonstrate how the promote feature works in Document Publisher Station, we are going to promote all the entries in the TOCs for the subpublications to the Master TOC. That is, we want be sure that the content associated with Heading 1 in the source documents (“Using Color,” etc., as in Figure 21-3) displays in the Master TOC, too.

Second, we are going to get rid of the two TOCs for the subpublications. That is, we are going to use them only for passing through information from the contents of the subpublications to the Master TOC. This will result in the Master TOC being like the Contents of a book, which summarizes all chapters and sections.

1. In the Contents pane, select one of the source documents in one of the subpublications. (It does not matter which one, because the same template is associated with all four.)
2. Click **Element Setup**  on the toolbar.
3. From the Elements list in the Elements tab dialog, select **Heading 1**. Click **Properties**, and then click **Promote** to open that tab dialog.
4. Make sure that the **Promote this element...** check box is selected, and in the Promote As text box, change Heading 1 to Heading 2. (By default, elements

are promoted under their own name, which is why Heading 1 was already entered in the Promote As text box.)

5. Click **OK** to return to the Elements tab.

Heading 2 is now in the Promote As column opposite Heading 1.

6. Click **OK** again, to return to the main window.

Now let us edit the TOC of the subpublications to ensure we pick up, and “pass through,” the element just promoted from the source documents.

1. In the Contents pane, select the TOC of one of the subpublications, and click

Element Setup  on the toolbar once again.

2. Double-click opposite **Heading 2** in the Promote As column. “Heading 2” will appear, to signify that this heading (originally Heading 1 in the source documents) has now been passed through.
3. In the In Body column, double-click each of the three green check marks, in turn, for **Heading 1**, **Title**, and **Title (System)**. You should end up with what you see in Figure 21-4.
4. Click **OK** to return to the main window.

You have accomplished two things. First, you have promoted Heading 1 (as Heading 2) from the source documents to the Master TOC. (Actually, at this stage, you’ve simply made it available for inclusion in the Master TOC.) Second, by changing all the green check marks in the In Body column to red crosses, you’ve removed the TOCs for the two subpublications from the web publication. Document Publisher Station won’t create an empty output page.

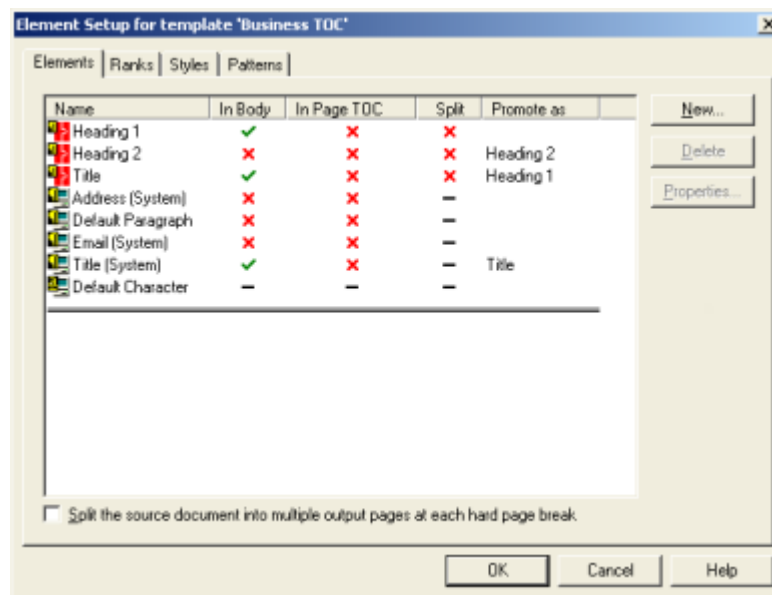



Figure 21-4 The Elements tab dialog for the TOC template for the subpublications.

Edit the template for the Master TOC

You are not quite done. Let us now edit the template for the Master TOC (here is why you always need to use different templates for reference pages at different levels in a publication).

1. Click **Promotion** in the Publication Hierarchy pane, and then select **Master TOC** in the Contents pane.
2. Click **Element Setup**  on the toolbar. Note that, in the Elements tab dialog, Heading 2 has been added to the Elements list (Figure 21-5).

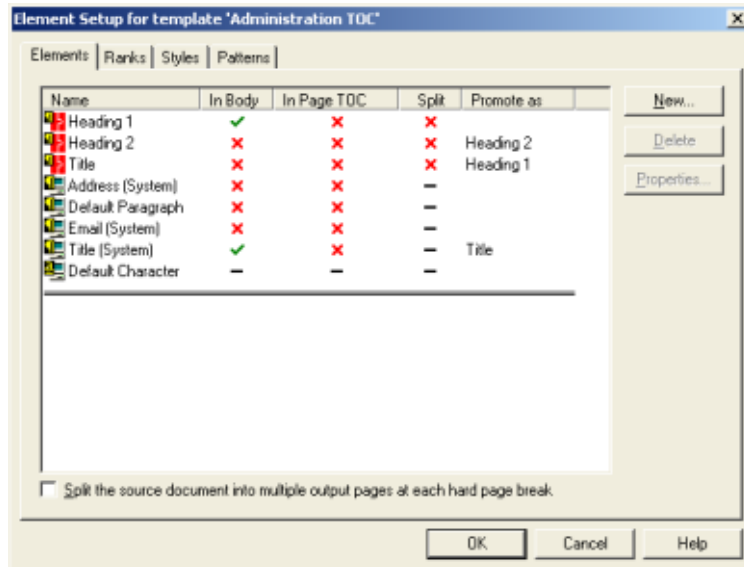




Figure 21-5 The Element tab dialog for the template for the master TOC of the root publication.

3. In the In Body column, double-click opposite **Heading 2**. You have now included Heading 2 in the Master TOC.
4. Click **OK** to return to the main window, and click **Translate**  on the toolbar (you can use the incremental translation command for the remainder of this lesson).
5. In the Contents pane, again select **Master TOC** and click **View** .

The TOC you now see is not quite like the one in Figure 21-6. In fact, you have a problem. While the content for Heading 1 has been successfully promoted, the element itself has not been properly formatted for the master TOC. That's because, in effect, we created a new element name (Heading 2) on the fly and never did format it.

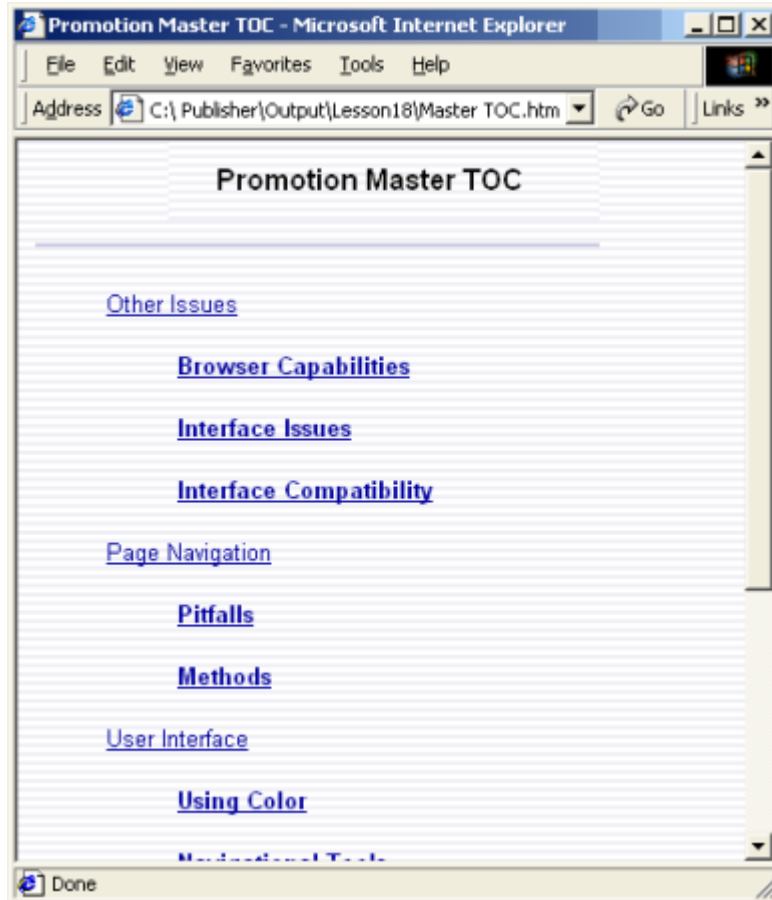





Figure 21-6 The final master TOC, with Heading 1 promoted from the bottom level of the publication and formatted.

Before we format this element, return to the Document Publisher Station main window, select one of the TOCs for one of the subpublications, and click View again. You will receive an error message saying the document has no content and cannot be viewed. These two TOCs are now simply empty containers, used only to promote elements from the source documents up to the Master TOC. The TOCs still exist and can be seen in the Contents pane, and they can still be used to promote other elements in this fashion.

Let us fix the problem with content associated with Heading 1 (promoted as Heading 2) not displaying properly in the Web browser.

1. In the main window, select **Master TOC** again and click **Edit Template**  on the standard toolbar. Pass your cursor over the Preview window and note the content associated with Heading 2.
2. Click **Formatting**, and from the Elements list, select **Heading 2**. In the Character tab dialog, under Font Size select **Use this size**. Accept the default Absolute Size in the first drop-down list, and from the second drop-down list, select the value **2**.
3. Switch to the Paragraph tab dialog. Under Indentation, select **Indent left side only by**, and use the Up/Down control to enter the value **2**.

4. Still in the Paragraph tab dialog, select **Title (System)** from the Elements list. Under Alignment, select **Use this alignment**, and choose **Center** from the drop-down list.
5. Click **OK** to return to the main window.
6. Click **Translate**  again.
7. Select **Master TOC** and click **View** .

This time, your Web browser should display Master TOC as you see it in Figure 21-6.

Tips

- When creating references pages at different levels in a publication hierarchy, it is best to associate different templates with those pages. This is essential if you plan to use a reference page at a particular level simply to “pass through” elements.
- You can still use essentially the same template for all reference pages, to ensure a common look and feel for all reference pages. You simply create new templates (one for each level in the publication hierarchy) and base them on a master reference page template.
- The key to passing through elements is to realize that they must not only be promoted to the next level up, but also included in the templates at that level. And if you want to pass them further up the publication hierarchy, you must continue to promote (and include) the elements in the appropriate template at each level.
- You can easily prevent any source document or reference page from displaying in your web publication by removing its content. Simply ensure that each element in the Elements list has red cross opposite it in the In Body column in **Element Setup**.
- Though not included in a web publication, a reference page with no content can still serve a useful purpose by acting as a conduit for promoted elements.
- Since Title is, by default, promoted as Heading 1, you must promote Heading 1 as Heading 2, and so on. As you do this, you are, in effect, creating new elements on the fly, and these elements will have to be formatted in the reference page template.
- If you want reference pages at every level in the publication hierarchy, as we had originally in this lesson, start by accepting the defaults in the TOCs you create. The top elements in any source document will always appear in the TOC if you do this.