INTERWOVEN

Interwoven TeamXpress™ for Multiplatforms V1.1, WebSphere™ Edition

User's Guide

INTERWOVEN

Table of Contents

INTERWOVEN

Chapter 1

Introduction

About This Manual

This guide tells you how to use TeamXpress. It refers to the version of TeamXpress that runs on the Solaris and Windows NT® or Windows 2000® server platforms and a variety of client platforms—Windows 95, 98, NT or 2000, Macintosh, or several types of UNIX. For more information on supported client platforms, see the "Getting Started" chapter of this manual.

Notation Conventions

This manual uses the following notation conventions:

Boldface text represents the exact text that appears in a GUI element (e.g. a menu item, button, or element of a dialog box). For example:

Click the **Edit File** button in the Button Bar.

`Monospaced` text represents command-line output, or file names. For example:

The `iwextattr` command-line tool allows you to set and look up extended attributes on a file.

`Monospaced italic` text represents a command-line variable. For Windows NT or Windows 2000, the commonest example of this is *`iw-home`*, which refers to the directory where TeamXpress is installed.

For example:

`iw-home``\etc\iw.cfg`

is the path to the main TeamXpress configuration file, `iw.cfg`, which is located in the `etc` directory under the TeamXpress installation directory.

```
iwckrole role user
```

means that you must insert the values of *role* and *user* yourself.

Monospaced bold text represents user input. The character that appears before a line of user input—% for Solaris or > for NT/2000—represents the command prompt, and should not be typed. For example:

http://*TeamXpress_hostname*/iw

means that you must enter the above text as represented, inserting the TeamXpress hostname in place of the italicized text.

Square brackets [ ] surrounding a command-line argument mean that the argument is optional.

A | character separating command-line arguments means that only one of the arguments should be used.

Support Information

For support information concerning IBM TeamXpress, refer to the following URL: http://www-4.ibm.com/software/webservers/teamxpress/support.html.

Overview

TeamXpress Structure

TeamXpress allows you to structure your Web development into different *branches*. Each branch contains private *workareas*, which contain complete virtual copies of the Web site; a *staging area*, where contributors integrate their work; and *editions*, which are read-only snapshots of the Web site at various points in its development. Each area contains a virtual copy of the entire Web site. Content is submitted from workareas to the staging area, and the staging area is then published as an edition. Editions may then be deployed to your production server.
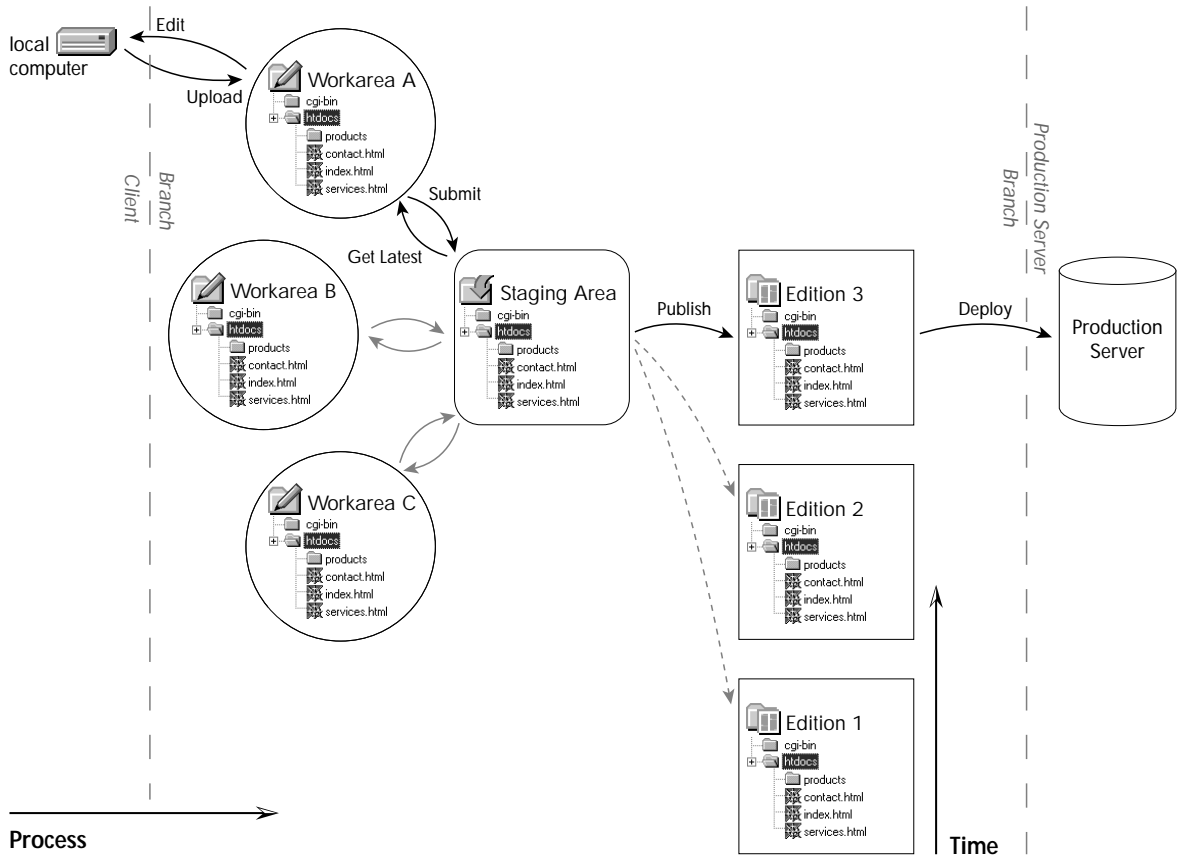
TeamXpress elements

Branches

TeamXpress allows you to structure your Web site into various *branches* of development. Branches may be related to each other (e.g. alternate language versions of the same Web site) or they may be completely independent (e.g. internet and intranet Web sites). Each branch contains all the content for a Web site. In TeamXpress, you cannot create workareas off of the main branch. Additionally, depending on the licensing agreement, you may not be able to add branches or sub-branches.

A single branch contains archived copies of the Web site as editions, a staging area for content integration, and individual workareas where users may develop content without disturbing one another. Branches can also contain sub-branches, so that teams may keep alternate paths of development separate from each other. Content can be easily shared and synchronized across branches and sub-branches. Users may work on one branch or on several, and the number of branches on a system is not limited.

Branches allow separate teams to work independently on different jobs. Because all branches are located on the same TeamXpress server, it is easy for one team to incorporate the work of another into their job.

Branches are depicted in TeamXpress with the ▬ icon.

Sub-branches

A *sub-branch* is a branch subordinate to a major branch. Each sub-branch receives its own unique staging area and workareas and generates its own editions, and it may contain sub-branches of its own. Editions published on a sub-branch can be integrated back into work on the higher branch, or released as stand-alone Web sites.

Workareas

A *workarea* is a virtual copy of the entire Web site. Contributors can create content within workareas and see their changes within the context of the Web site without affecting the actual site or the work of other contributors. Users who have access to a workarea may modify files within that workarea and view their changes within the context of the entire Web site before integrating their work with that of other contributors (this process is known as SmartContext™ QA). Users can lock files in each workarea, eliminating the possibility of conflicting edits.

All changes that are made to files in a workarea are kept completely separate from other workareas and the staging area until the user chooses to promote his changes to the staging area. Within a workarea, users may add, edit, or delete files, or revert to older versions of files without affecting other users.

Workareas are depicted in TeamXpress with the ![workarea icon] icon.

Staging Areas

A *staging area* is where the work of different contributors is coordinated. Contributors can submit the contents of their workareas to the staging area to confirm that their work is well integrated with that of other contributors.

Staging areas are depicted in TeamXpress with the ![staging area icon] icon.

Editions

An *edition* is an archived, read-only version of the Web site that can be deployed to the Web server. Editions are "snapshots" of the staging area at a particular point in time. Older editions are kept in the branch along with the current version. Contributors can create new editions any time they feel their work is well integrated, or any time they want to create an update to the Web site for reference or deployment. Each edition is a fully functional version of the Web site, so that users may see the development of the Web site over time and compare it with current work.

Editions are depicted in TeamXpress with the ![edition icon] icon. Editions that have been compressed to save disk space are depicted with the ![compressed edition icon] icon.

TeamXpress Users

TeamXpress has four classes of users: Authors, Editors, Administrators, and Master users. Each of these types has different abilities and levels of influence within the structure of TeamXpress.

Authors

Authors are primary content creators. All work done by Authors goes through an explicit approval step. They can receive assignments from Editors, which are displayed in Task lists when Authors log in to TeamXpress. Authors can access TeamXpress from a simple browser-based interface, and do not need to be sophisticated computer users.

In order to test and QA their work, Authors have full access to the content in their Editors' workareas, but do not need to concern themselves with the larger structure and functionality of TeamXpress. The Author role is appropriate for non-technical users, or for more technical contributors who do not need access to TeamXpress's extended functionality, such as TeamXpress's advanced version management features.

Editors

Editors own workareas. They create and edit content, just as Authors do, but they are primarily responsible for managing the development taking place within their workareas. This includes advanced version management, participation in workflow processes and submitting completed content to the staging area, and it may include publishing editions.

Editors have access to specialized TeamXpress content and workflow management functions. Editors are generally "managerial" users, who primarily supervise the work of Authors, or self-managing "power" users, who need TeamXpress's extended functionality to manage their own content.

Administrators

Administrators own branches. They have all the abilities of Editors, but they are primarily responsible for the content and functioning of their branch. Administrators can manage project workflow by creating new workareas for Editors and groups, and by creating sub-branches of their own branch to explore separate paths of development.

An Administrator is the supervisor of the project being developed on his branch. He may be the Web master for a particular version of the Web site, or a project manager.

Masters

Master users own the Web site. They can perform all the functions of Editors and Administrators on any branch. The Master user owns the main branch, from which all sub-branches are created. The Master user is generally involved in the installation of TeamXpress, and can reconfigure TeamXpress on a system-wide basis.

TeamXpress Workflow

Workflow Models

A *workflow model* is a general workflow configuration that can be used repeatedly. Each workflow model describes a process which may include user tasks and a wide variety of automated tasks. Workflow models are configured by the system administrator. For more information about configuring different workflow models, consult *Administering TeamXpress.*

Below is a diagram of a very simple assign-edit-approve workflow model. Email is sent to the participants at every stage of the process, and some automated tasks are performed at the end.
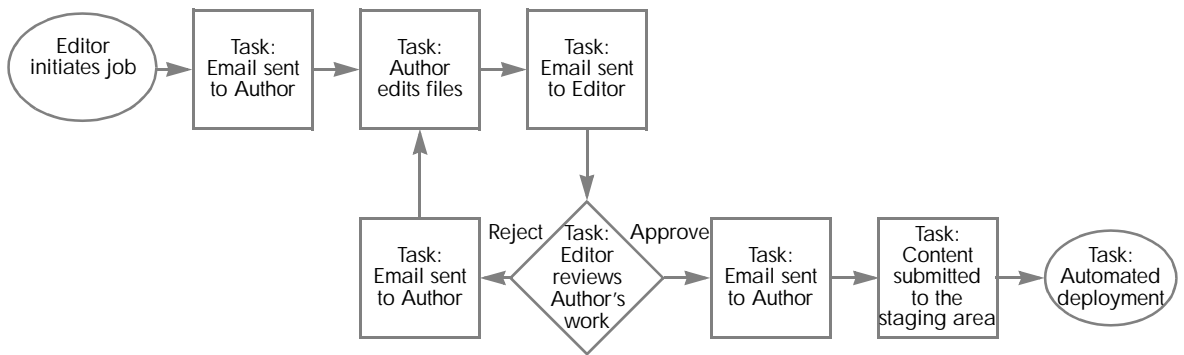
Workflow model

Jobs

A *job* is a set of interdependent tasks. One example of a TeamXpress job would be the set of tasks needed to prepare a new section in a marketing Web site to support a new product launch.

Each job is a specific instance of a workflow model. When a job is created, the job creator must supply all the specific information for that job. For example, the workflow model above might be used to create the job below.
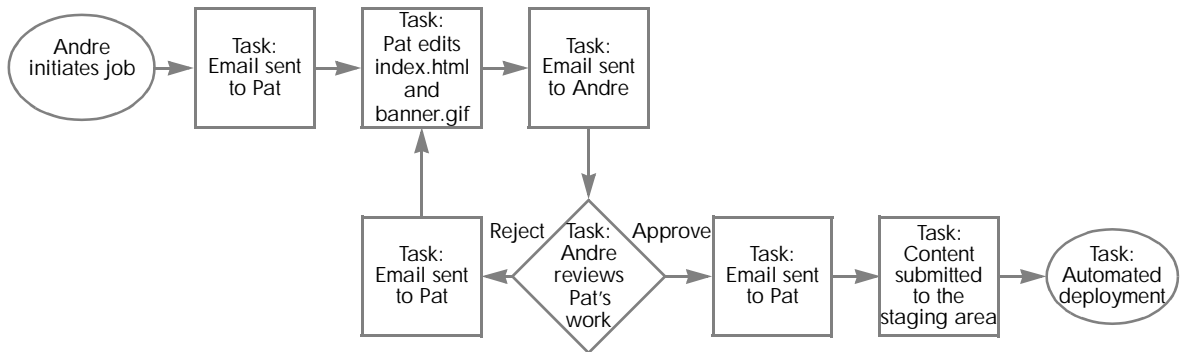
Job model

Because jobs follow predefined workflow models, tasks cannot be added to or removed from individual jobs.

Tasks

A *task* is a unit of work performed by a single user or process. Each task in a job is associated with a particular TeamXpress workarea and carries a set of files with it. The user or process owning a task can modify, add files to, or remove files from the task.

Tasks have two possible states: active and inactive. A task becomes active when its predecessor tasks signal it to do so (predecessor tasks and conditions for activation are all configured as part of the workflow model). Once the task has been activated, users or external programs can do work on it. For example, once a user task has been activated, the user can work on the files contained in the task. Once an external task has been activated, the appropriate external program can run on the files contained in the task. Inactive tasks are tasks that have been completed, or that have not been activated yet.

Chapter 2

Getting Started

The TeamXpress graphical user interface (GUI) gives you full access to TeamXpress through a simple browser-based interface. The GUI is used to perform all functions specific to TeamXpress, as well as some general file management functions such as creating new files and directories. The GUI is also used to edit files and perform in-context QA. TeamXpress supports the input of multiple languages through the GUI. For details, see Appendix B, "Internationalization".
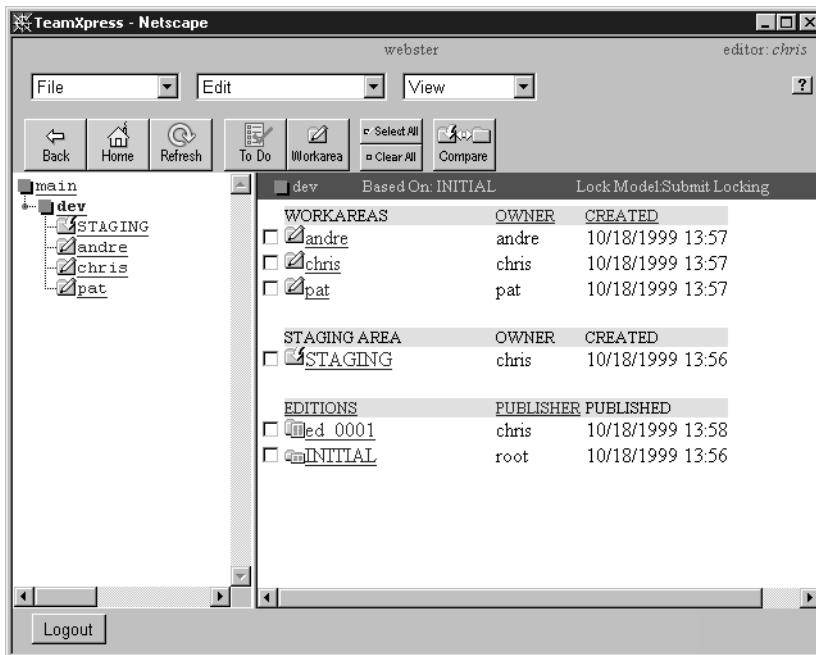
TeamXpress branch structure, as seen through the GUI

Choosing a Browser

The TeamXpress GUI runs through a browser such as Netscape or Internet Explorer. The TeamXpress thin-client interface does not require you to install any other client software unless you will be editing files through the TeamXpress GUI. If you will be editing files, you will need to install a small utility called LaunchPad (see page 18).

Not all TeamXpress features are compatible with all browsers on all client platforms. The following tables show compatibility for most popular browsers on all supported client platforms:

Windows 95, 98, 2000, and NT

	Netscape				Internet Explorer	
	4.06-4.08	4.5x	4.6	4.7	4.x	5.0
TeamXpress GUI	Yes	Yes	Yes	Yes[1]	Yes	Yes*
SmartContext Editing	No	Yes	Yes	Yes	Yes	Yes
Merge	Yes	Yes	Yes	Yes	Yes	Yes

1. Recommended

Solaris

	Netscape				Internet Explorer	
	4.06-4.08	4.5x	4.6	4.7	4.x	5.0
TeamXpress GUI	Yes	Yes	Yes	Yes*	No	Yes*
SmartContext Editing	No	Yes	No	Yes	No	Yes
Merge	Yes	Yes	Yes	Yes	No	Yes

Macintosh

	Netscape				Internet Explorer	
	4.06-4.08	4.5x	4.6	4.7	4.01	4.5
TeamXpress GUI	Yes	Yes	Yes	Yes[1]	Yes	Yes[*]
SmartContext Editing	No	No	No	No	No	No
Merge	No	No	No	No	Yes	Yes

1. Recommended

Logging In to TeamXpress

1. Access TeamXpress through your browser:

   `http://TeamXpress_hostname/iw/`

2. The TeamXpress login screen will appear. If this is your first time using TeamXpress, and you are using Windows 95, 98, NT, or 2000, TeamXpress's helper application, LaunchPad, will auto-install on your computer. If you are not using Windows, you will need to install LaunchPad manually (Macintosh users: see page 20, UNIX users: see page 24).

3. Select your user type (Author, Editor, Administrator, or Master) using the pulldown menu.

4. Enter your username and password, and select your Domain (Solaris only) from the pull-down menu.

5. Click the **Login** button.

Login as   Author
Username   Author
            Editor
Password   Administrator
            Master
            Login

TeamXpress login screen for NT/2000

Login as   Editor
Username   andre
Password
Domain   WEBSTER

TeamXpress login screen for Solaris

6. The TeamXpress window will appear. The view that appears is called your Home page and can be
    returned to at any time by clicking the **Home** button in the Button Bar. You can set the **Home** but-
    ton to go to any location in TeamXpress where you have access (see page 42).

    If you have not set your Home page, TeamXpress will show you a list of the jobs that you own. If
    you are an Author, TeamXpress will show you a list of the tasks that you own.

In future logins, TeamXpress will "remember" your latest settings through a cookie it sets on your
computer.

Installing and Configuring LaunchPad

If you are going to edit files or view them in an editing application, you need to install LaunchPad.
LaunchPad is a small helper application that resides on your local computer, which allows you to make
associations between file types and the editing applications you want to use. For example, your
computer may automatically be configured to always open HTML files in a browser. You can configure
LaunchPad so that when you open an HTML file through the TeamXpress GUI, it will open in your
editing application instead.

If you are using Windows 95, 98, NT, or 2000, LaunchPad will automatically install itself the first time you log in to TeamXpress[1]. For all other platforms, or if your site has auto-install disabled, see page 19. Consult the following sections about configuring and using LaunchPad on all platforms.

LaunchPad is available for:

- Windows 95, 98,NT, or 2000 (see page 19)
- Macintosh (see page 20)
- UNIX (see page 24)

LaunchPad for Windows 95, 98, 2000 or NT

The first time you log in to TeamXpress, LaunchPad will automatically download and install on your local computer.

For LaunchPad to auto-install, your browser must be running on Windows NT, 95, 98, or 2000, and (if you are using Netscape) Java and auto-install must both be enabled.

To enable Java with Netscape:

1. Select **Edit** > **Preferences**.
2. In the left-hand pane, click **Advanced**.
3. Make sure the check box next to **Enable Java** is checked.
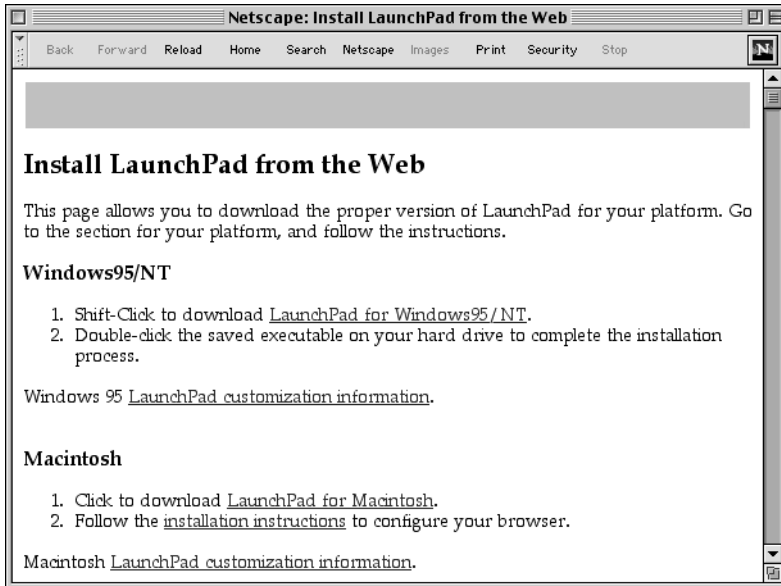
To enable auto-install with Netscape:

1. Select **Edit** > **Preferences**.
2. In the left-hand pane, double-click **Advanced**.
3. Select **SmartUpdate**.
4. Make sure the check box next to **Enable SmartUpdate** is checked.

If you have difficulties with the auto-install process, or if LaunchPad auto-installation has been disabled on your TeamXpress server, you can also install LaunchPad manually. Select **Edit** > **LaunchPad Setup** in the TeamXpress GUI, and follow the instructions for your platform.

---

1. If you uninstall LaunchPad, it may not automatically reinstall itself the next time you log in to TeamXpress.

LaunchPad for Macintosh

1. Before you install LaunchPad, you must download it. Select **LaunchPad Setup** from the **Edit** menu. The Install window will appear.

```
┌─────────────────────────────────────────────────────────────┐
│         Netscape: Install LaunchPad from the Web             │
├─────────────────────────────────────────────────────────────┤
│  Back  Forward  Reload  Home  Search  Netscape  Images  Print  Security  Stop │
├─────────────────────────────────────────────────────────────┤
│                                                              │
│  Install LaunchPad from the Web                              │
│                                                              │
│  This page allows you to download the proper version of     │
│  LaunchPad for your platform. Go to the section for your     │
│  platform, and follow the instructions.                      │
│                                                              │
│  Windows95/NT                                                │
│                                                              │
│    1. Shift-Click to download LaunchPad for Windows95/NT.   │
│    2. Double-click the saved executable on your hard drive  │
│       to complete the installation process.                  │
│                                                              │
│  Windows 95 LaunchPad customization information.            │
│                                                              │
│  Macintosh                                                   │
│                                                              │
│    1. Click to download LaunchPad for Macintosh.            │
│    2. Follow the installation instructions to configure     │
│       your browser.                                          │
│                                                              │
│  Macintosh LaunchPad customization information.             │
└─────────────────────────────────────────────────────────────┘
```

Install LaunchPad window

2. Find the section for your platform.

3. Click or shift-click the link for your platform to download the file.

4. Your browser will ask you where to save the file. Locate the directory you want to download the LaunchPad installation file to, and click **OK**. If you are reinstalling LaunchPad, it is usually safest to download the new version to the same location as the old version.

After you have downloaded LaunchPad, you will need to set up your browser. LaunchPad can be used with Netscape 4.x for the Macintosh, or Internet Explorer 4.01 or later.
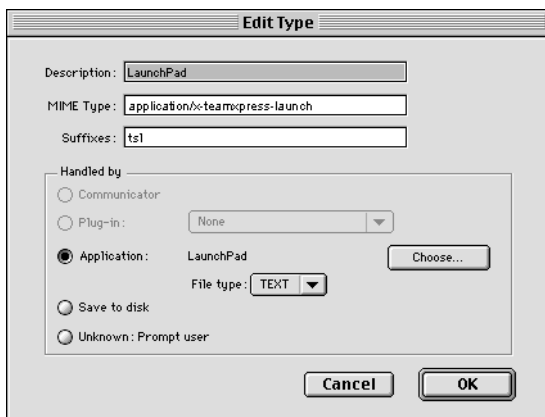
Installing LaunchPad for Macintosh: Netscape 4.x

1. In Netscape 4.x, choose **Preferences** from the **Edit** menu. If **Applications** is not already displayed in the left-hand (Category) panel, click the triangle next to **Navigator** in the **Category** panel.

2. Click **Applications** in the **Category** panel.
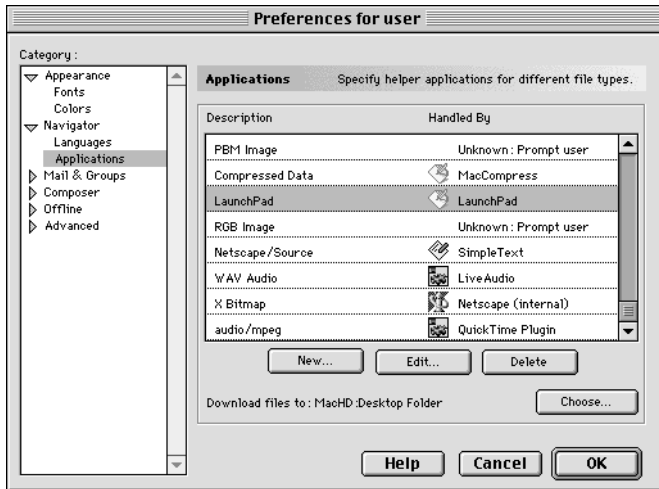
User Preferences window

3. Click the **New** button. An Edit Type window will appear.

Edit Type window

4. Fill in the boxes as shown above. Use "application/x-TeamXpress-launch" for the MIME type and "tsl" for the suffix.

5. Click the **Application** radio button, then click the **Choose** button.

6. Navigate to the location of LaunchPad on your hard drive. Select LaunchPad and click **Open**.

7. Click **OK**.

8. LaunchPad will now appear as a Netscape helper application.

Installing LaunchPad for Macintosh: Internet Explorer

1. In Internet Explorer, select **Edit** > **Preferences**. The Internet Explorer Preferences window will appear. In the left-hand panel of the Preferences window, locate the **Receiving Files** heading. Under this heading, click on **File Helpers**.
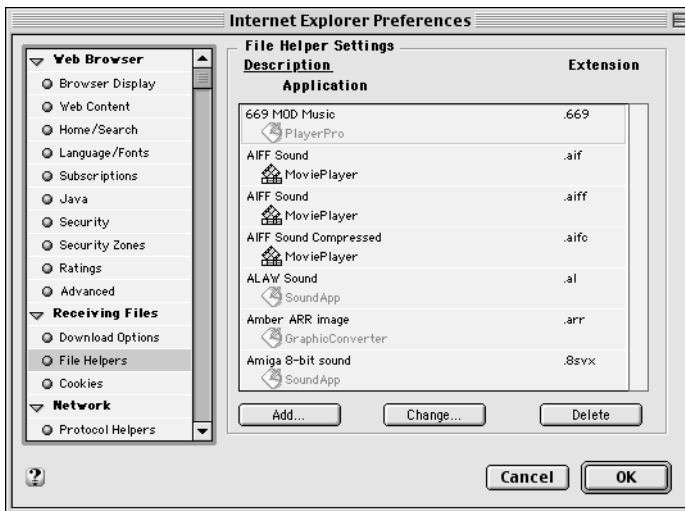
Internet Explorer Preferences window

2. Click **Add**. The Edit File Helper window will appear.
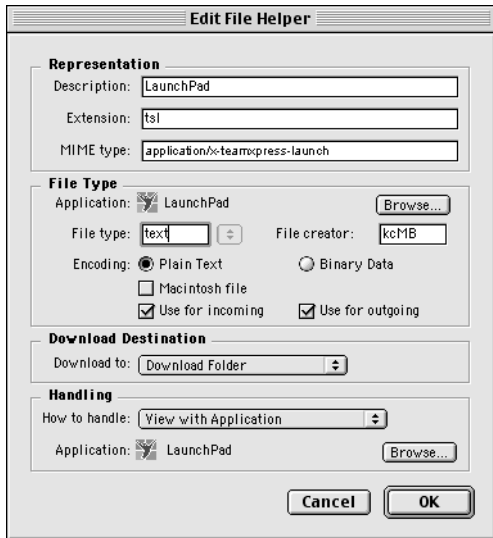
Edit File Helper window

3. Fill in the boxes as shown above.

4. In the **File Type** section of the Edit File Helper window, select **Browse**. Navigate to the location of LaunchPad on your hard drive. Select LaunchPad and click **Open**.

5. Select **View with Application** in the **Handling** section.

6. Click **OK**.

7. LaunchPad will now appear as an Internet Explorer helper application.

Troubleshooting LaunchPad for Macintosh

The most common cause of difficulties with LaunchPad on the Macintosh is improper browser configuration. If, when you edit files, your Macintosh does not download them correctly, check your browser setting as described in "Installing LaunchPad for Macintosh: Netscape 4.x" or "Installing LaunchPad for Macintosh: Internet Explorer".

INTERWOVEN

LaunchPad for UNIX

1. Before you install LaunchPad, you must download it. Select **LaunchPad Setup** from the **Edit** menu. The Install window will appear.

Install LaunchPad window

2. Find the section for your platform.

3. Click or shift-click the link for your platform to download the file.

4. Your browser will ask you where to save the file. Locate the directory you want to download the LaunchPad installation file to, and click **OK**. If you are reinstalling LaunchPad, it is usually safest to download the new version to the same location as the old version.

5. After you have downloaded LaunchPad, type the command that corresponds with your platform:

Solaris for Sparc:
```
% sh launch-solaris-sparc.shar
```
Solaris for Intel:
```
% sh launch-solaris-intel.shar
```

Irix5.3 and later:

```
% sh launch-irix5.3-mips.shar
```

6. Exit all browsers.

    Type:

    ```
    % cd launch
    ```

    Type:

    ```
    % ./install
    ```

Configuring LaunchPad

When you edit, view, create, or import a file, TeamXpress will start LaunchPad. You do not need to start LaunchPad manually unless you are installing or configuring it.

LaunchPad has several options that allow you to customize the way that you work. First, you will probably need to configure which file types are associated with your editing applications. To configure file types for Windows 95, 98, NT, or 2000 client platforms, see page 25. To configure file types for Macintosh client platforms, see page 29. To configure file types for UNIX client platforms, see page 32.

You can also configure whether you edit files locally or remotely. You can choose to use Direct Edit, where you edit files directly on the server, or Remote Edit, which downloads files to your computer where you can edit them, then upload them to the server via LaunchPad.

Configuring File Types for Windows 95, 98, NT, or 2000

Windows associates different applications with different file types, so that when you double-click on a file, it knows what application to use to open it. You will only need to configure LaunchPad preferences for file types if they are *different* from your Windows preferences. For example, you may have a particular graphics editor set to open JPEG files in your Windows preferences, and want to use the same graphics editor to open JPEGs from TeamXpress, as well. In that case, you would not need to set preferences for JPEGs in LaunchPad.

INTERWOVEN

However, you may have a browser set to open HTML files in your Windows preferences, but you may want to use a text editor or a WYSIWYG editor to open HTML files from TeamXpress. In that case, you would need to set preferences for HTML files in LaunchPad.

Additionally, TeamXpress may be configured to automatically associate a particular application with a particular file type for all Windows clients. If this has been done, the **Auto-Update** checkbox in the File Type window will be checked in the dialog box for each auto-configured extension. You can override this association by unchecking the checkbox and manually configuring the association (see page 28).

Adding File Types

To add a new type of file to your LaunchPad preferences:

1. From the LaunchPad window, select **Properties** from the **File** menu. The LaunchPad Preferences window will appear.

2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.

LaunchPad Preferences: File Types tab

3. Click the **New Type** button. An empty File Type window will appear.
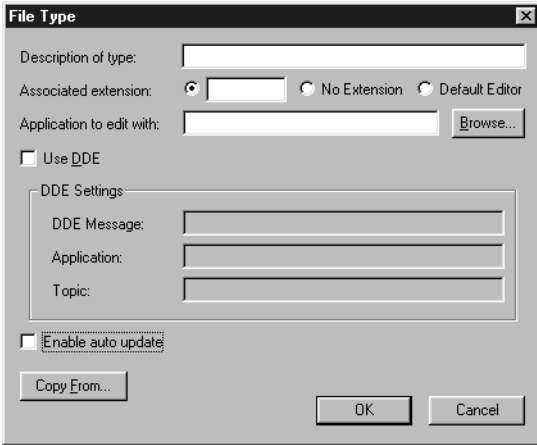
File Type window

4. Unless you are familiar with DDE settings for your editing application, it is usually safest to copy all necessary information from an existing setting. Click the **Copy From** button.

5. A Choose Extension window will appear. Scroll down until you find an entry that uses the editing application that you want to use. Click the entry, then click **OK**.
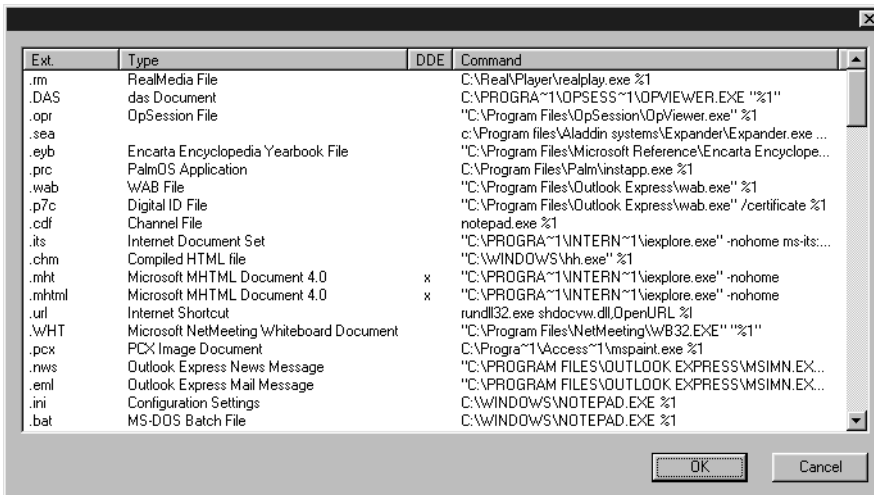
Extensions window

6. All the necessary information will be copied into the File Type window. Edit the **Description of type** and the **Associated extension** boxes as necessary. The file extension must begin with a period (e.g. `.html`, `.jpg`, `.gif`).

   Note: You can only configure one extension per entry. For example, although you might want to use the same editor for `.htm` and `.html` files, you would still need to create two different entries.

7. Click **OK**.

8. The new file type will appear in the File Types window. Click **OK**.

Editing File Types

To change the settings for an existing entry:

1. From the LaunchPad window, select **Properties** from the **File** menu. The LaunchPad Preferences window will appear.

2. Click on the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.
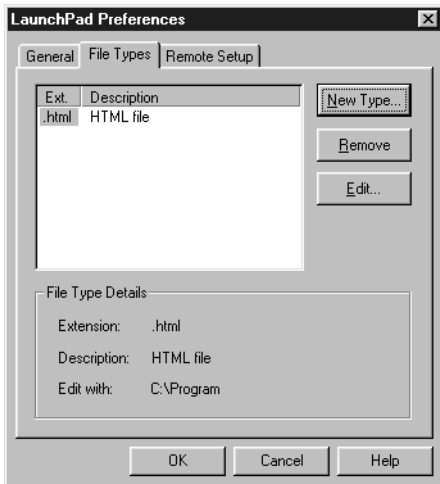
LaunchPad Preferences: File Types tab

3. Select the file type you want to change.

4. Click **Edit**. The File Type window containing the settings for that file type will appear.
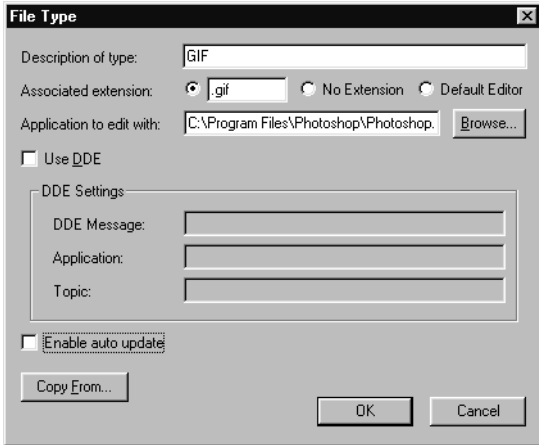
File Type window

5. From the File Type Window, you can change settings using the **Copy From** button, as described above, or you can edit them manually. Click **OK**.

6. The edited file type will appear in the File Type window. Click **OK**.

Configuring File Types for Macintosh

LaunchPad uses an application called Internet Config to configure file type associations with editing applications. Internet Config is often bundled with other applications, as well. You may want to search for other copies of Internet Config and remove them.

1. Double-click the Internet Config application inside the LaunchPad folder. The Internet Preferences window will appear.
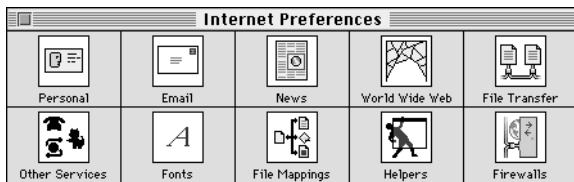
Internet Preferences window

2. Click the **File Mappings** button. The File Mappings window will appear, containing a list of file types and the applications currently associated with them.
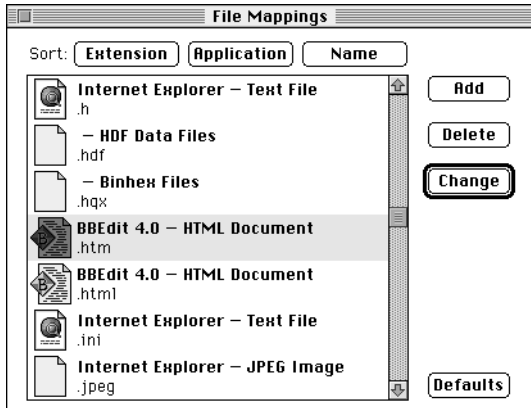
File Mappings window

You can sort the lists by extension, by application, or by name.

Adding File Types

To add a new file type:

1. Click the **Add** button in the File Mappings window. The Mapping Entry window will appear.

2. Enter the name of the file type in the **Name** box.

3. Enter the extension (e.g. `.html`, `.htm`, `.gif`) in the **Extension** box.

4. Click the **Defaults** button. The Internet Config default settings for your extension will appear.

5. If you do not want to use these settings, you can choose a sample file. Click **Choose Example** and navigate to a file that can be opened by the application you want to use. The safest way to choose this file is to create a new file of the appropriate type with the application that you want to use. Click **OK**.

6. In the Mapping Entry window, check the settings to make sure they're correct. Click **OK**.

If you experience problems opening files with LaunchPad, try rebuilding your Desktop (restart the computer and hold down ⌘-Option as it starts back up).

Editing File Types

To change the application associated with an extension:

1. Scroll down the list of file mappings until you find the entry that you want to change.

2. Click on the entry, then click the **Change** button. The Mapping Entry window will appear.
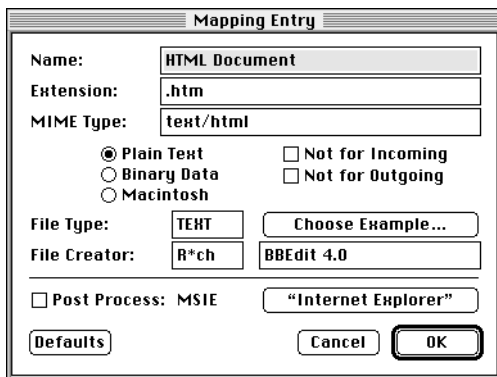
Mapping Entry window

3. Check the existing settings. If you do not want to use these settings, click the **Defaults** button. The Internet Config default settings for your extension will appear.

4. If you do not want to use these settings, you can choose a sample file. Click **Choose Example** and navigate to a file that can be opened by the application you want to use. The safest way to choose this file is to create a new file of the appropriate type with the application that you want to use. Click **OK**.

5. In the Mapping Entry window, check the settings to make sure they're correct. Click **OK**.

Configuring File Types for UNIX

To customize LaunchPad you will need to edit the `.iwlaunch.cfg` file in your home directory:

```
[filetypes]
default=prog_name [args] %1
.extension=prog_name [args] %1

[preferences]
mountMode=mode
localMountFolderPref=path
```

The `[filetypes]` section of `.iwlaunch.cfg` contains one `default` line, which sets the default editor, and any number of *extension* lines of the form:

```
extension=prog_name [args] %1
```

where *extension* is the extension of the file type that *prog_name* knows how to edit. `[args]` are any arguments (or none) that you want passed to *prog_name* when it is invoked. `%1` is a placeholder for the filename that gets passed to *prog_name*.

If the program you want to run expects to run in a terminal, wrap its execution in an xterm, e.g.:

```
extension=xterm -e an_editor %1
```

Direct Edit: Saving Files Directly to the Server

You can use this option if you are using Windows and can access the TeamXpress server on your LAN (see below), or if you are using UNIX (see page 34). Direct Edit is not recommended for Macintosh users.[1]

Direct Edit for Windows

With Direct Edit for Windows, you can map a network drive, which may also be useful for file system access. However, if you do not want to map a network drive, you can still use Direct Edit for Windows.

---

1. Certain Macintosh applications are incompatible with LaunchPad Direct Edit due to differences in the way they handle file types. Text editors such as BBEdit and SimpleText will usually work with Direct Edit for the Macintosh.

To use Direct Edit with a mapped network drive

1. Using Windows Explorer, map your TeamXpress server to a network drive. In the Path field, type in the directory for your main branch . For example, for NT, type `\\`*SERVERNAME*`\IWServer\default\main`. For Solaris, type `IWDEFAULT\MAIN or` `\\`*SERVERNAME*`\IWMAIN`).

Map Network Drive window

2. From the LaunchPad window, select **Properties** from the **File** menu. The LaunchPad Preferences window will appear.

3. Select the **Remote Setup** tab.

4. Select "Use locally mounted TeamXpress server". Enter the letter of the networked drive that the TeamXpress server is mapped to (e.g. I:). If you have multiple TeamXpress servers, you can only access one at a time with Direct Edit, but you can change from one to another as needed.

If you do not want to map a network drive:

1. Select **Properties** from the **File** menu in the LaunchPad window. The LaunchPad Preferences window will appear. Select the **Remote Setup** tab.

2. Select "Use locally mounted TeamXpress server". Enter the directory for your main branch, e.g. `\\`*SERVERNAME*`\ for Solaris, or IWServer\default main for NT/2000`. Before you start editing files for the first time, you will need to go into Network Neighborhood, double-click on the TeamXpress server, and enter your username and password when prompted.

Future edits will be saved directly to the server. You will not need to upload files from LaunchPad.

Direct Edit for UNIX

To have LaunchPad use Direct Edit, set the `mountMode` line of `.iwlaunch.cfg` to read:

`mountMode=local`

Set the `localMountFolderPref` line to point to the main branch of the TeamXpress mount, e.g.:

`localMountFolderPref=/iwmnt/default/main/`

With Direct Edit, each time you save a file, it will be saved directly to the TeamXpress server.

Remote Edit: Editing Files on Your Computer

All users can edit files remotely with LaunchPad. You should use this option if you are using a Macintosh, if you are using Windows and cannot access the TeamXpress server via a LAN, or if you use multiple TeamXpress servers on a regular basis.

With Remote Edit, when you edit a file, LaunchPad downloads a temporary copy of the file to your local computer. LaunchPad then opens the file in the editing application that you have configured.

(Windows and Macintosh) When you have finished editing the file, you must tell LaunchPad to upload the temporary copy to the TeamXpress server.

(UNIX) When you save the file, LaunchPad will upload the temporary copy to the TeamXpress server.

Configuring Remote Edit Preferences for Windows or Macintosh

You can tell LaunchPad whether to remove or keep the temporary copies of files that you have edited when you upload these files. To set this preference, select **Properties** from the **File** menu. The LaunchPad Preferences window will appear with the **General Preferences** tab showing. This tab allows you to change the directory for TeamXpress temporary files. However, if you change this directory, LaunchPad may not work properly.

Setting preferences in LaunchPad

Under "What to do with the temporary local files after uploading them," select the option that best describes the behavior you want. If you select "Always remove" or "Always keep" LaunchPad will not query you at the time of upload. "Always remove" only removes the temporary copies of files that LaunchPad has downloaded from TeamXpress. It will not affect any other copies of the files that you have on your computer. "Always keep" leaves the temporary files on your computer for further use. You may want to use this option if you want to edit the files again after uploading them. If you use this option, you will need to remove the files manually at some point.

Configuring Remote Edit for UNIX

With Remote Edit, any file you edit through the TeamXpress GUI will not be uploaded to the TeamXpress server until you quit your editing application.

To have LaunchPad use Remote Edit, set the `mountMode` line of `.iwlaunch.cfg` to read:

```
mountMode=remote
```

Using Remote Edit

To edit files on your local computer:

1. From the LaunchPad window, select **Properties** from the **File** menu. The LaunchPad Preferences window will appear.

2. Select the **Remote Setup** tab.

3. Select "Use TeamXpress remotely".

Future edits will download a temporary copy of the file to your computer and automatically open it in the editing application that you have configured LaunchPad to use. You will then need to upload the file for your changes to show up in TeamXpress.

If you have closed a file or quit your editing application, and you want to edit the file again:

1. Click the file name in the LaunchPad window.

2. Click **Edit**.

3. The file will open in your editing application.

Using a Different Editing Application

You can also choose a different editing application than the one you have set in your LaunchPad Preferences.

1. Click the file name in the LaunchPad window.

2. Click **Edit With**.

3. A browsing window will appear. Browse your computer until you locate the editing application that you want to use, and click its name.

4. Click **OK**. The file will open in the application that you have chosen.

Uploading Files

LaunchPad permits you to upload the files you have edited to the TeamXpress server whenever you are connected to the TeamXpress server.

A file that has been edited since it was last uploaded will be displayed in the LaunchPad window with a ▨ (Changed) icon. A file that has not been edited, or that has been uploaded since it was last edited, will be displayed with an 🖹 (Unchanged) icon.
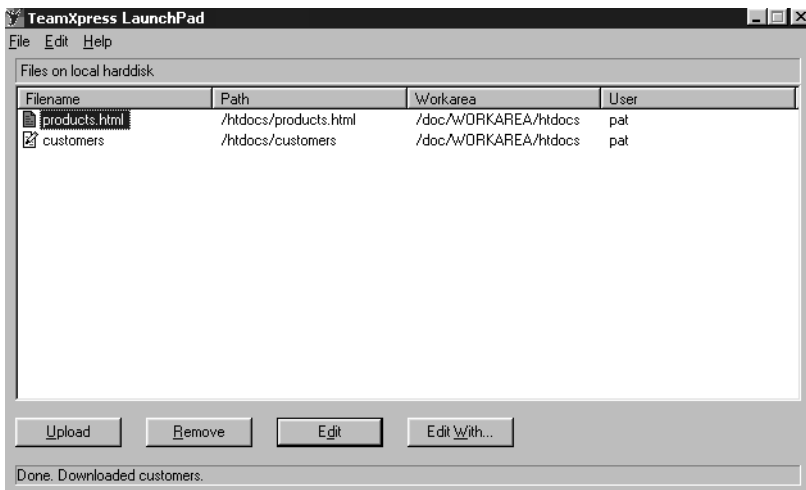
LaunchPad window

To upload files:

1. Save your changes.

2. Go to the LaunchPad window and click the names of the files you want to upload.

3. Click **Upload**.

4. A dialog box will appear asking if you want to delete the copy of the files on your hard disk. If you want to continue editing the files, click **Keep**. If you are finished with the files, click **Remove**. To cancel the operation and close the dialog box, click **Cancel**.

5. TeamXpress will upload the files you have just edited to the TeamXpress server.

To automatically upload all changed files, select **Upload Changed Files** from the LaunchPad **File** menu.

If you are finished with the files that appear in the LaunchPad window and do not want to upload them, you can delete them from your hard disk without uploading them first.

1. Click the file names in the LaunchPad window.

2. Click the **Delete** button.

3. A dialog box will appear asking for confirmation. Click **Delete** to remove the files from your hard disk.

To automatically remove all unchanged files, select **Remove Unchanged Files** from the LaunchPad **File** menu.

Logging Out of TeamXpress

When you have finished your work and want to log out of TeamXpress, click the **Logout** button in the lower left hand corner of the TeamXpress window. A confirmation window will appear. Click **OK**. TeamXpress will log you out and return you to the login screen.

Understanding the Workflow and Branch Views

TeamXpress has two main views: the Workflow view, which displays information about jobs and tasks, and the Branch view, which allows you to navigate through TeamXpress areas. In the Workflow view, you can learn about the jobs and tasks relating to you by clicking the **To Do** button in the Button Bar. To view the details of an individual job or task, click its underlined name.

You can move from the Workflow view to the Branch view by clicking the **Workarea** button in the Button Bar. TeamXpress will display a list of the branches and workareas where you have access. To navigate into a branch or workarea, click its name. The TeamXpress window will display the Branch view.
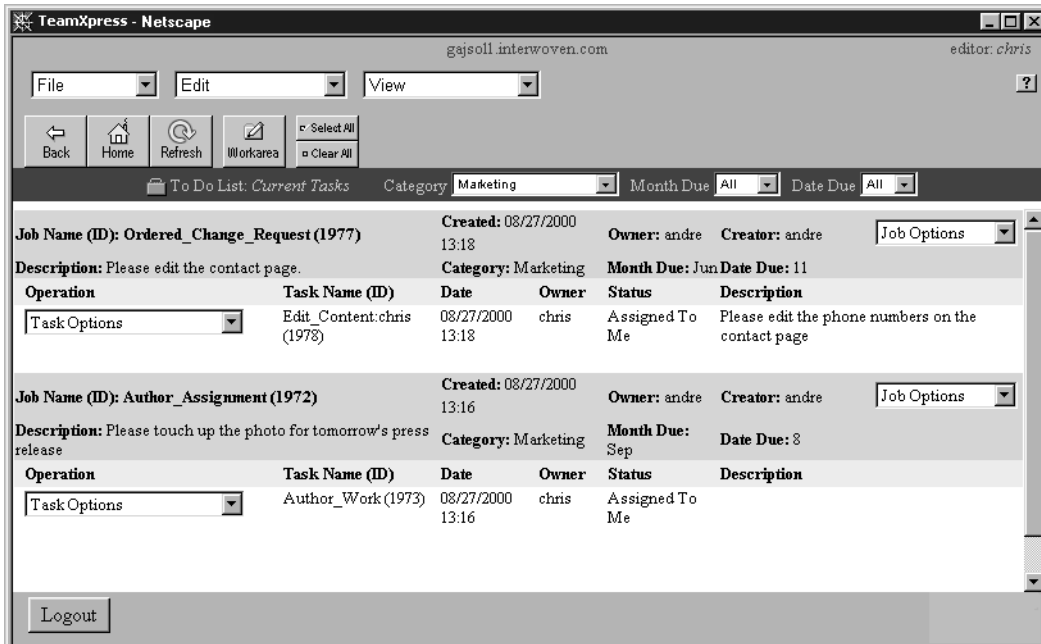
In the Branch view, the left-hand pane (the Navigation Window) allows you to navigate through TeamXpress. The right-hand pane (the Work Window) will be updated as you navigate through the system. The top of the screen contains a Button Bar, containing buttons for the most frequently used commands, and a Menu Bar, containing drop-down menus for all TeamXpress commands. To return to the Workflow view, click the **To Do** button in the Button Bar.
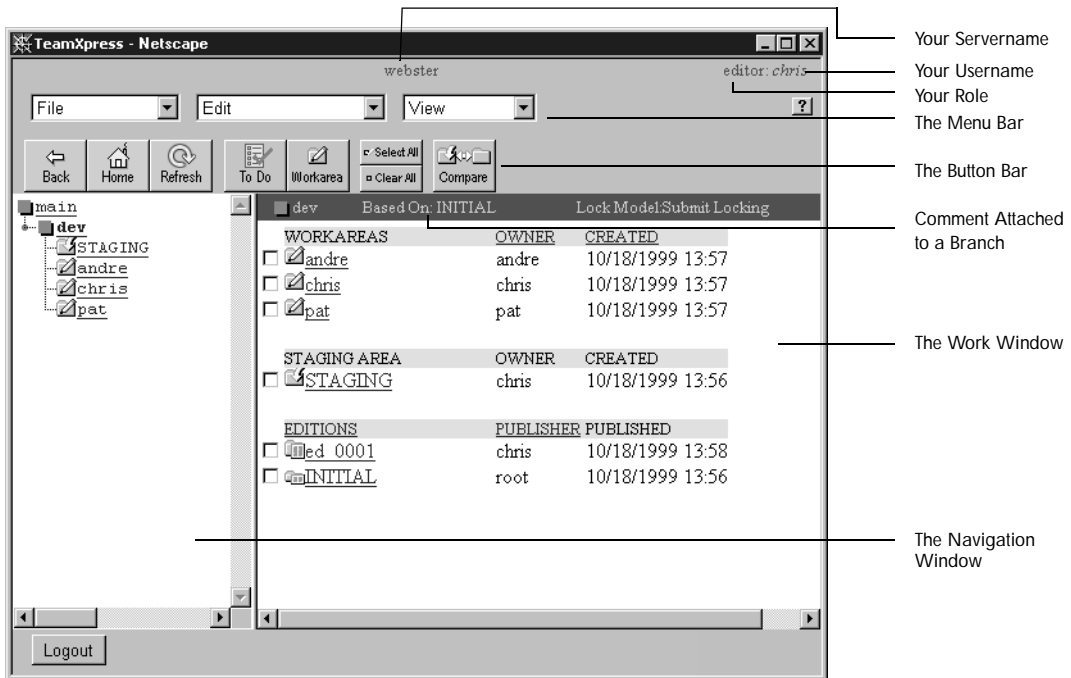
The TeamXpress window, displaying a branch view

Using the TeamXpress Workflow View

The TeamXpress Workflow view allows you to track your current jobs and tasks, to see the history of a job, and to see what files make up a task. To see jobs and tasks that you own, click the **To Do** button in the Button Bar. To further refine this view, select one of the options in the **View** menu.

A Task list

To go to the Branch view, click the **Workarea** button in the Button Bar.

Navigating Through the TeamXpress Branch View

To navigate through TeamXpress, single-click the underlined name of a branch, workarea, or directory in the Navigation Window (the left-hand pane of the TeamXpress window). The contents of that branch, workarea, or directory will be displayed in the Work Window (the right-hand pane of the TeamXpress window). Click the name of a workarea, staging area, edition, or directory in the Work Window to display its contents in the Work Window and to update the Navigation Window to show your current position in TeamXpress. The Navigation Window will show the branch elements or directories at your current level, and your current location will be highlighted with a red dot. Click the **Back** button in the Button Bar to return to the previous view.

While both the Work Window and the Navigation Window can be used to navigate, you can only manipulate individual files in the Work Window. To view a file in a separate browser window, click its underlined name. To navigate into a directory, click its underlined name. To perform an operation on a file or directory, click the checkbox next to the file name. You can sort files and directories by name, owner or publisher, and date by clicking on the underlined attribute names in the Work Window. By default, files are sorted by name.

In a workarea, files and directories may be displayed with several different icons. Each icon contains information about that file or directory's status. See the "TeamXpress Icon Reference" on page 169 for a complete list of TeamXpress icons.

You may sometimes need to refresh the Work Window to see changes that have been made. You can do this by clicking the name of your current directory in the Navigation Window.

To return to the Workflow view, click the **To Do** button in the Button Bar.

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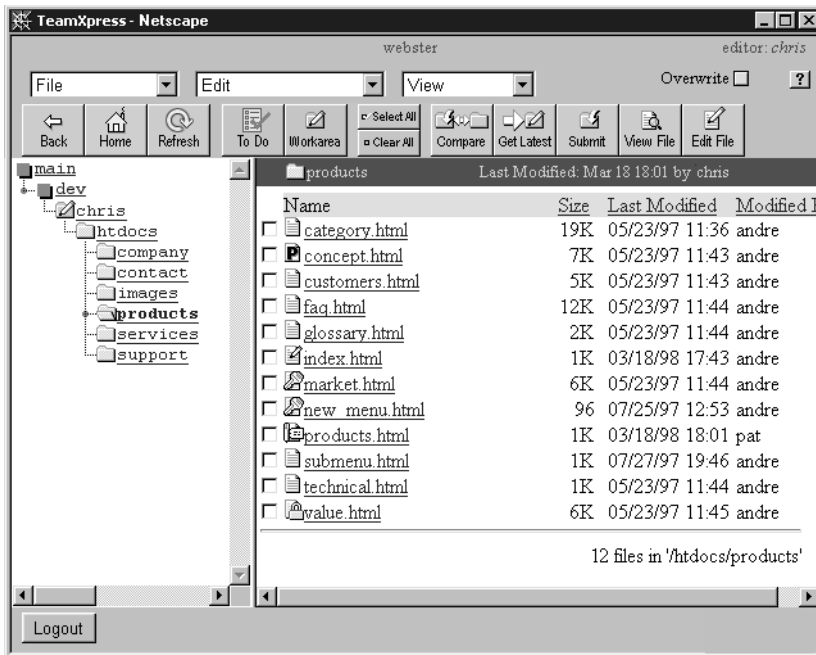
A workarea containing modified, assigned, locked, and private files

Setting Your Home Page

To set your Home page:

1. In the TeamXpress GUI, navigate to the location or workflow view that you would like to go to automatically when you first log in.

2. Select **Edit** > **Set Home Page**.

Your Home page setting will be stored on the TeamXpress server. You can change this setting at any time, or reset it to the default setting. If you change the name of the path to your Home page (e.g., if you rename a directory in the path), you will need to set your Home page again.

To reset your Home page to the default setting, select **Edit** > **Reset Home Page**.

Using Menus and Buttons

The Tool Bar consists of a Button Bar, containing the most frequently used commands, and a Menu Bar which displays drop-down menus containing all available commands. Various commands are displayed in the Menu Bar and Button Bar at different times according to when you can use them.
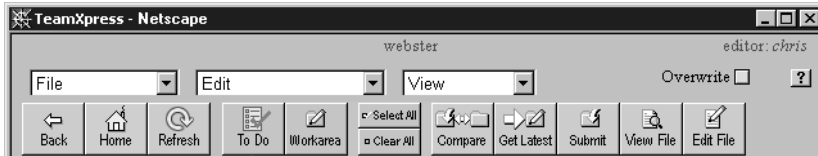
Editor's Tool Bar

The Menu Bar contains three drop-down menus: **File**, **Edit**, and **View**. Each menu is displayed only when you can use at least one of the commands that it contains. Individual commands within the menus are displayed only when you can use them. Your TeamXpress server may have some custom menu items not described in this manual.

Using SmartContext Editing

When you click the name of a file in the TeamXpress GUI, the file will appear in a new browser window containing the TeamXpress SmartContext Editing tab.[1] This tab displays information about the current status of the file shown in the browser window. To use SmartContext Editing, click the tab. A pull-out bar will appear, containing buttons and menus which will allow you to edit the page.

---

1. The SmartContext Editing tab is not supported by all browsers. To find out if your browser supports SmartContext Editing, see page 16.
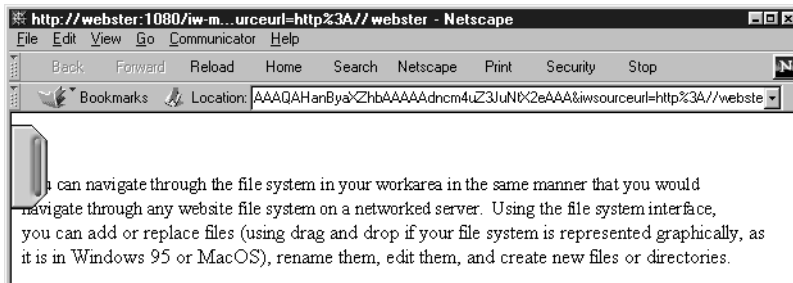
A browser window with the SmartContext Editing tab

The SmartContext Editing tab contains a Color Bar which tells you about the file's status. If a pencil is also displayed, it means that the file has been modified.

Color Bar

Pencil
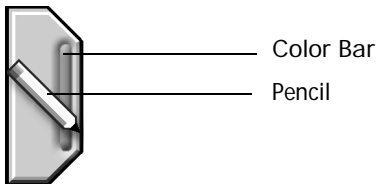
The SmartContext Editing tab

Color Bar	Status
Gray	You cannot modify this file (it is locked or you do not have permission).
Green	You can modify this file.
Yellow	You can modify this file, but a newer version is in the staging area.
Red	You can modify this file, but it is in conflict with the staging area.

To learn more about the file's status, move your mouse arrow over the SmartContext Editing tab. A ToolTip will appear with more detailed information. Or, pull out the tab and select **Advanced** > **File** > **File Properties**.

When you pull out the SmartContext Editing tab, you gain access to several features:
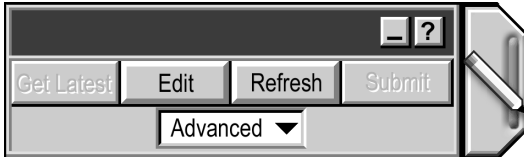
The pulled-out SmartContext Editing tab

The SmartContext Editing tab contains four buttons: **Get Latest**, **Edit**, **Refresh**, and **Submit**. These buttons are displayed as active or grayed out according to whether or not you can use them. The tab also contains a pull-down menu called **Advanced**. This menu allows you to access several other features, such as viewing a file's properties, configuring the SmartContext Editing tab, and editing images. When selecting menu items in the Advanced menu, you may need to click on the text of the menu item itself.

Minimizing the SmartContext Editing Tab

If you don't need to use the SmartContext Editing tab, you can minimize it to reduce its footprint and

loading time. To minimize the SmartContext Editing tab, open the tab and click the ▬ (Minimize) button. The page will reload, and the minimized version of the tab will replace the full version of the tab.
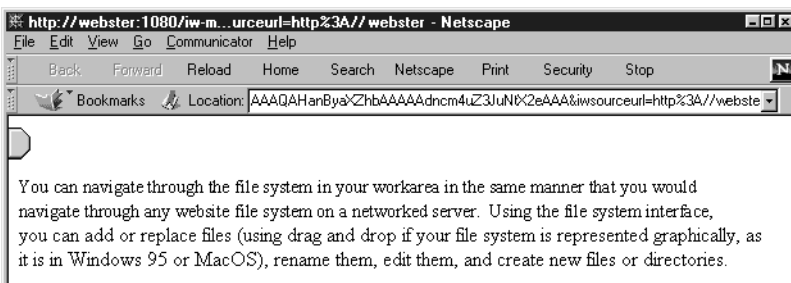
A browser window with the minimized SmartContext Editing tab

To re-activate the SmartContext Editing tab, click the minimized tab.

Configuring SmartContext Editing

Configuring LaunchPad

When you are using SmartContext Editing, if you have LaunchPad set to use Remote Edit, you should configure your LaunchPad to **Always Remove** uploaded files (see page 34). If you do not set this option, the LaunchPad window will rapidly fill up with the files that you edit, and they will not be automatically removed. You can, however, remove these files manually.

Setting Your Launch Page

You can set SmartContext Editing to bring up a certain page as soon as you log in to TeamXpress. To set this option, navigate to the page you want to appear when you log in, and select **Advanced** > **Options** > **Launch Page** > **Set Launch Page** in the SmartContext Editing tab. The next time you log in to TeamXpress, this page will appear immediately.

To change this setting, navigate to another page and select **Advanced** > **Options** > **Launch Page** > **Set Launch Page** in the SmartContext Editing tab.

To turn this feature off, select **Advanced** > **Options** > **Launch Page** > **Unset Launch Page** in the SmartContext Editing tab.

Setting Tab Defaults

You can set the default position of the SmartContext Editing tab. Select **Advanced** > **Options** > **Tab Defaults** in the SmartContext Editing tab, and select one of **Position: Left**, **Position: Right**, or **Position: Top**. The tab will then appear from the left, right, or top of the browsing window, by default.

You can also set the default mode of the SmartContext Editing tab. Select **Advanced** > **Options** > **Tab Defaults** in the SmartContext Editing tab, and select one of **Mode: Lite** or **Mode: Full**. The tab's default size will then be either minimized or full.
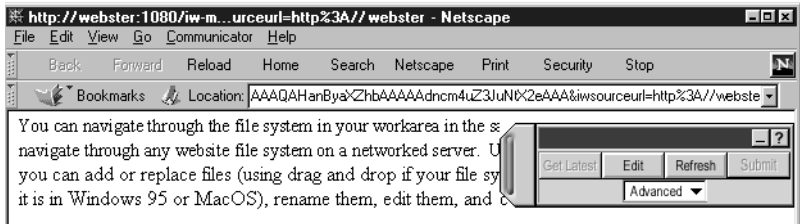
The SmartContext Editing tab, configured to appear from the right-hand side of a window

Synchronizing the TeamXpress Window

If, while using SmartContext Editing, you navigate away from the directory displayed in the main TeamXpress GUI, you can synchronize the main TeamXpress window so that it displays the directory containing the file shown in the SmartContext Editing window.

To synchronize the main TeamXpress window with the SmartContext Editing window, select **Advanced** > **Sync Window** in the SmartContext Editing tab.

Using the File System Interface

The file system interface allows you to manage your Web content in TeamXpress as if it were on a mounted drive on the network. The file system interface is used primarily for file management functions such as moving and copying files, and it can also be used to edit files. It also allows the use of links checkers and scripts that need to be able to access and/or create files. In addition, most TeamXpress operations can be performed from a command-line interface.

Accessing the TeamXpress File System Interface

You can access TeamXpress as you would any networked server:

Windows Client to NT/2000 Server

To access TeamXpress from Windows, use Network Neighborhood to locate the TeamXpress server. You can navigate to any directory in TeamXpress (for example, the top level of a workarea, or a directory within a workarea), and create a shortcut to that directory.

You can also mount the TeamXpress server as a networked drive:

1. In Windows Explorer, select **Map Network Drive** from the **Tools** menu.

2. Select the drive letter you want to map the TeamXpress server to from the pull-down **Drive** menu.

3. Locate the TeamXpress server in the **Shared Directories** list. Double-click on the TeamXpress server.

4. Double-click on `IWServer`.

The TeamXpress server will now be mounted as a networked drive.

Windows Client to Solaris Server

1. Use Network Neighborhood to locate the TeamXpress server. Alternatively, select **Find…Computer** from the **Start** menu to locate the server.

2. Double-click the server name to open it. If you are asked for a username and password, enter your TeamXpress username and password. The TeamXpress server will appear on your desktop.

Macintosh Client to NT/2000 Server

To access TeamXpress, you will need client software such as DAVE. Install DAVE (or other client software that allows you to access a Windows NT/2000 server), and use it to mount your TeamXpress server.

Macintosh Client to Solaris Server

1. In the Chooser, select **Appleshare**.

2. Select the name of the TeamXpress server. Click **OK**.

3. If you are asked for your username and password, enter your TeamXpress username and password, and click **OK**.

4. Select the items you want to use, and click **OK**. The TeamXpress server will appear on your desktop.

UNIX client to NT/2000 or Solaris Server

Log in to the TeamXpress server using your TeamXpress username and password. For an NT/2000 server, you need to install an SMB client in order to access the server.

Navigating Through TeamXpress

You can navigate through the file system in your workarea in the same manner that you would navigate through any Web site file system on a networked server. Using the file system interface, you can add or replace files (using drag and drop if your file system is represented graphically, as it is in Windows 95 or MacOS), rename them, edit them, and create new files or directories.

Once you have accessed the TeamXpress server, you will need to locate your workarea. The file system structure of the branch shown on the first page of this chapter is shown below.

Here, the main branch (main) contains a sub-branch (dev). The sub-branch contains three workareas (andre, pat, and chris), a staging area, and two editions. Each workarea, staging area, and edition contains a complete virtual copy of the Web site, so you must first navigate to your workarea, then navigate to the portion of the Web site you are working on. You can create shortcuts (Windows) or aliases (Macintosh) to files or directories within TeamXpress, as you normally would for files or directories on your local computer.
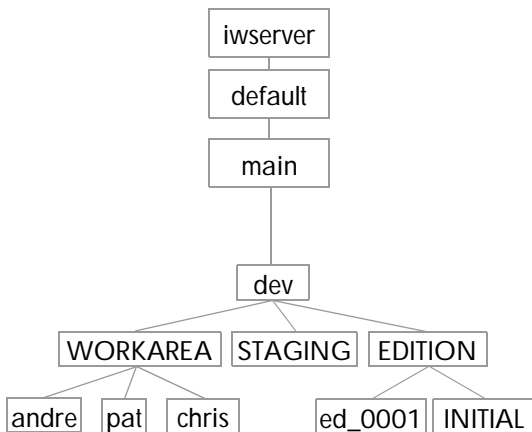
Sample TeamXpress file system structure

Chapter 3

TeamXpress Basics

This chapter discusses basic TeamXpress functionality such as editing files, creating and deleting files and directories, renaming files, importing files into your workarea, viewing files, submitting files to your workarea, and updating your workarea.

TeamXpress supports the input of multiple languages through the GUI. For details, see Appendix B, "Internationalization".

Creating New Files

You can only create new files in directories where you have write permissions.

Before you create or edit files with TeamXpress, you must install and configure TeamXpress's helper application, LaunchPad (see "Installing and Configuring LaunchPad" on page 18).

To create a new file in a workarea where you have access:

1. Go into the workarea by clicking its name. When you are in a workarea, the **New File** command will appear in the **File** menu. Within the workarea, navigate to the directory where you want to place the new file.

2. Select **File** > **New File**. The New File dialog box will appear.

   In the New File dialog box, if the current directory location is not where you want to put the new file, navigate to the directory where you want to put the file.
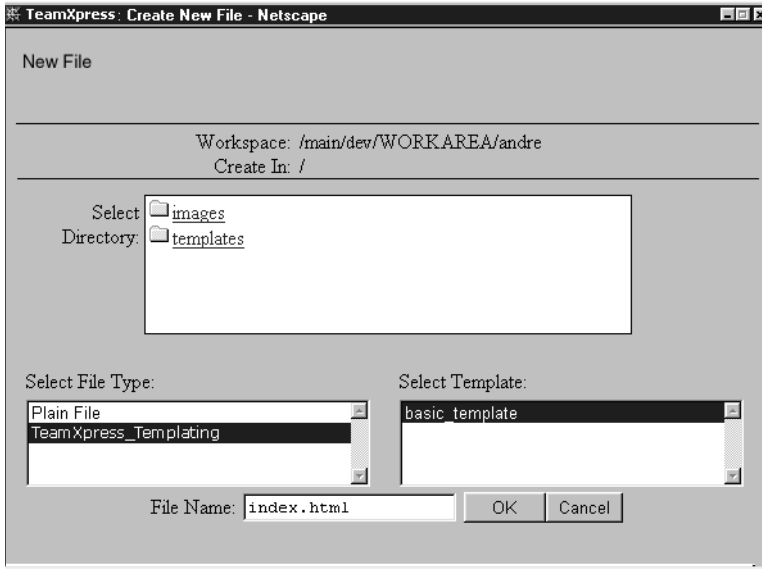
The New File window

3. Select the type of template you want to use, then select the specific template that you want to use.[1] If you do not want to use a template, select **Plain File**.

4. In the **File Name** box, type the name of the file you want to create. You will need to include the suffix (e.g. `filename.html`). You should avoid using any of the following characters in filenames:

   `\ / : * ? " < > |`

   If a file with the same name exists in another workarea and is locked, you will not be able to create the file. If a file with this name exists in the staging area, you will be asked whether you want to create a new file or bring a copy of the file in the staging area into your workarea. Follow the directions in the dialog boxes that appear.

5. Click **OK**.

---

1. The templates you select through the New File window are not TeamXpress Templating templates. For more information about New File templates, see page 180. For more information about TeamXpress Templating, consult *Using and Configuring TeamXpress Templating.*

UNIX users: The file will open in the application associated with its file extension. Edit the file as you normally would, and save your changes. If you are using Direct Edit (see page 32), the file will be saved to the TeamXpress server each time you save it. If you are using Remote Edit (see page 34), your changes will not be uploaded until you quit your editing application.

Windows and Macintosh users: The file will open in the application associated with its file extension. If you are using Direct Edit (see page 32), changes will be saved to the TeamXpress server when you save the file. If you are using Remote Edit (see page 34), its name will appear in the LaunchPad window, and you must upload it after you have saved it.

Creating New Directories

You can only create directories inside directories where you have write permissions.

To create a new directory in a workarea that you have access to:

1. Go into the workarea by clicking on its name. Within the workarea, navigate to where you want to place the new directory. When you are in a workarea, the **New Directory** command will appear in the **File** menu.

2. Select **File** > **New Directory**. A dialog box will appear, asking you to enter the name of the new directory.

3. Type the name of the directory you want to create. You should avoid using any of the following characters in directory names:

   \ / : * ? " < > |

4. Click **OK**. An empty directory will be created.

Deleting Files and Directories

To delete files or directories in your workarea:

1. Click the checkboxes next to the files or directories that you want to delete in your workarea.

2. Select **File** > **Delete**. A dialog box will appear asking you to confirm these deletions.

3. Click **OK**.

The list of files in your workarea will be updated to reflect the deletions.

Editing Files

TeamXpress allows you to edit files from the TeamXpress GUI in two ways: through SmartContext Editing, where you browse the Web site and edit pages as you view them, or through the main TeamXpress GUI, where you browse the directory structure of the Web site and edit individual files.

Before you create or edit files with TeamXpress, you must install LaunchPad on your computer (see "Installing and Configuring LaunchPad" on page 18).

Editing Files Through SmartContext™ Editing

1. To edit a file using TeamXpress SmartContext Editing, click the name of a file in the Work Window or a Task Details window in the TeamXpress GUI. The file will open in a new browser window containing the TeamXpress SmartContext Editing Tab.

2. Navigate through the Web site by clicking links until you reach the page you want to edit.

3. When you reach the page you want to edit, click the SmartContext Editing Tab so that it opens, as shown below.
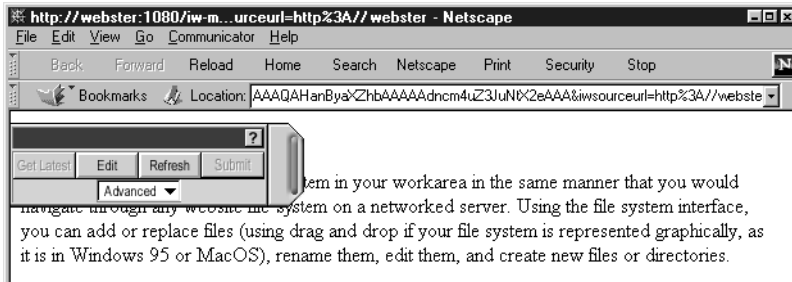
A browser window with the SmartContext Editing tab pulled out

4. Click the **Edit** button on the pulled-out tab. The file will open in your editing application.

5. Edit the file as you normally would. When you are done editing the file, save it.

6. To see the changes you made, return to the SmartContext Editing window and click the **Refresh** button on the pulled-out tab. Your changes will be uploaded at this time.

Editing Images with SmartContext Editing

To edit the images that appear in a page:

1. To edit a file using TeamXpress SmartContext Editing, click the name of a file in the Work Window or a Task Details window in the TeamXpress GUI. The file will open in a new browser window containing the TeamXpress SmartContext Editing Tab.

2. Navigate through the Web site by clicking links until you reach the page you want to edit.

3. When you reach the page containing the images you want to edit, click the SmartContext Editing Tab so that it opens.

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4. Select **Advanced** > **Image List** on the pulled-out tab. An Image List window will appear, containing all the images that appear on the page.
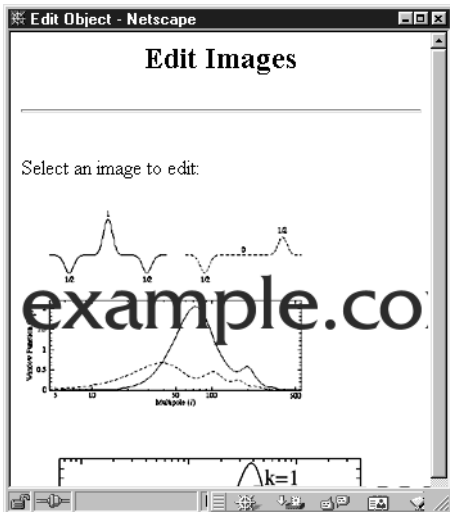
The Edit Images window

5. In the Image List window, click the image you want to edit. A new window will appear, displaying the image and the SmartContext Editing tab.

6. Edit the file using SmartContext Editing (see page 54). When you are done editing the file, save it.

7. To see the changes you made, return to the SmartContext Editing window and click the **Refresh** button on the pulled-out tab.

SmartContext Editing and Framesets

If you are editing a frame-based page, a SmartContext Editing tab will appear in each frame so that you can select which file to edit. However, you can also edit the frameset file itself.

To edit a frame-based page's frameset file:

1. Select **Advanced** > **Frame Mode on/off** in the SmartContext Editing tab. **Frameset Mode** will appear in the blue portion of the bar. While Frameset Mode is turned on, all actions you take through SmartContext Editing will apply to the frameset file, not to the file that appears in a portion of a page.
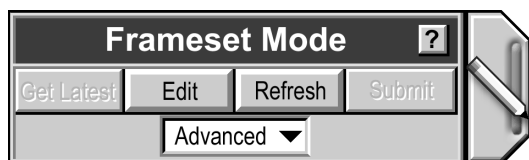
The SmartContext Editing tab, with Frameset Mode turned on

2. Click the **Edit** button on the SmartContext Editing tab. The file will open in your editing application.

3. Edit the file as you normally would. When you are done editing the file, save it.

4. To see the changes you made, return to the SmartContext Editing window and click the **Refresh** button on the pulled-out tab.

Editing Files Through the TeamXpress GUI

To edit a file through the main TeamXpress GUI using your default editing application:

UNIX users:

1. In the TeamXpress GUI, navigate to the directory containing the file you want to edit.

2. Click the checkbox next to that file.

3. Click the **Edit File** button in the Button Bar or select **Edit** > **Edit File**.

4. The file will open in your editing application. Edit the file as you normally would. If you are using Direct Edit, the file will be saved to the TeamXpress server each time you save it. If you are using Remote Edit, your changes will not be uploaded until you quit your editing application.

Macintosh and Windows users:

1. In the TeamXpress GUI, navigate to the directory containing the file you want to edit.

2. Click the checkbox next to that file.

3. Click the **Edit File** button in the Button Bar or select **Edit** > **Edit File**.

   If you are using LaunchPad's Direct Edit feature (see page 32), changes will appear on the server as soon as you save them. If you are using Remote Edit (see page 34), a temporary version of the file will be downloaded to your computer, and its name will appear in the LaunchPad window. Changes will not appear until you upload the files from LaunchPad.

4. The file will open in your editing application. Edit the file as you normally would. If you are using Remote Edit, you will need to upload the file from LaunchPad after you have saved it.

Editing Files With an Alternate Application

To edit a file using an alternate editing application:

Macintosh and Windows users only:

1. Navigate to the directory containing the file you want to edit. Click the checkbox next to that file.

2. Select **Edit** > **Edit With.**

An Open With window will appear. Select the editing application you want to use from the list displayed.
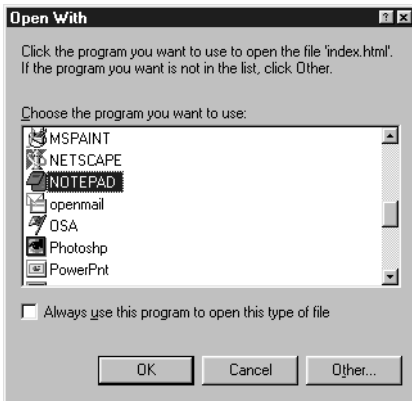
The Open With window

If you cannot find the application you want to use, click the **Other** button and navigate to the location of the editing application. Click **Open**.

Locating an editing application

3. The file will open in your editing application. Edit the file as you normally would. If you are not using Direct Edit, you will need to upload the file from LaunchPad after you have saved it.

Importing Files Into Your Workarea

TeamXpress lets you import any file or files residing on your hard drive into the TeamXpress system. You must have LaunchPad installed (see "Installing and Configuring LaunchPad" on page 18) to import files.

Windows 95, 98, or NT Client

1. Select **File** > **Import Files**.

2. LaunchPad will open, and a Select File window will appear. In the Select File window, navigate to the directory containing the files you want to import. Select the files (hold down the shift key to select multiple files) and click **OK**.

    The files will be uploaded to TeamXpress.

If you want to import files that have the same names as existing files, click the **Overwrite** button before selecting **File** > **Import Files**. The files in your workarea will be overwritten by the imported files with the same names.

Macintosh Client

1. Select **File** > **Import Files**.

2. LaunchPad will open, and a Select File window will appear. In the Select File window, navigate to the file you want to import. Select the file and click **Open**.
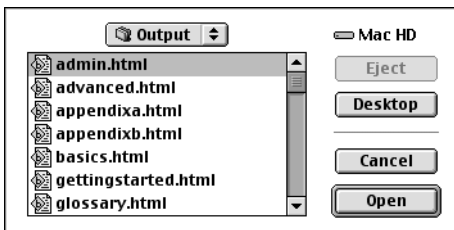
The Select File window

3. The Select File window will reappear. Continue to select files to import, clicking **OK** after each one. When you are finished selecting files, click **Cancel**. The files will be uploaded to TeamXpress.

If you want to import files that have the same names as existing files, click the **Overwrite** button before selecting **File** > **Import Files**. The files in your workarea will be overwritten by the imported files with the same names.

Renaming Files

The TeamXpress Rename command gives a file a new name, but does not change the directory path to the file. If you want to both rename and move a file, you must use the Move command.

You can only rename files if you have write permissions for the directory containing the files. To rename a file:

1. Select the checkbox next to the name of the file that you want to rename.

2. Select **File** > **Rename**.

3. A dialog box will appear. Type the new name (not the full path) of the file, including extension. You should avoid using the following characters in the file's name:

   \ / : * ? " < > |

4. The file will appear in the workarea with a ✎ (Modified) icon.

Renaming a file actually creates a new file with the new name and deletes the old file. The version history of the file will keep track of the name change—older versions of the file will not be lost.

You should submit the deleted file to the staging area (see page 105).

Moving Files

To move a file from one directory to another:

1. Select the checkbox next to the name of the file that you want to move.

2. Select **File** > **Move**.

3. A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be moved to. Be sure to include the filename in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

   `/htdocs/products/index.html` would specify an absolute path.

   `products/index.html` would specify a relative path.

   `../support/index.html` would specify a relative path.

4. The file will appear in the new location with a ✎ (Modified) icon.

The version history of the file will keep track of the change in location—older versions of the file will not be lost.

Copying Files

To copy a file from one directory to another:

1. Select the checkbox next to the name of the file that you want to copy.

2. Select **File** > **Copy**.

3. A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be copied. Be sure to include the filename in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

   `/htdocs/products/index.html` would specify an absolute path.

   `products/index.html` would specify a relative path.

   `../support/index.html` would specify a relative path.

4. A copy of the file will appear in the new location with a (Modified) icon.

Viewing Files

You can view any file that you have read access to, whether or not it is locked by another user.

Browser View

To view a file within the context of the Web site, click its underlined filename within a workarea, staging area, or edition. The file will appear in a new browser window. You may need to clear the disk cache in order to see changes immediately.

If your Web site uses frames, you may need to click the top-level file (often `index.html`) and navigate to the file you need within the frame.

If you need to see the end of the page's URL (for example, if you need to see the name of the displayed file), click the browser's **Location** text box, then press the **End** key. To return to the beginning of the URL, press the **Home** key.

Source View

To view a read-only copy of a document in your preferred editing application, click the checkbox next to that file, then click the **View File** button in the Button Bar or select **Edit** > **View File**. A read-only copy of the file will be opened in your preferred editing application. You will be able to edit this copy, but you will not be able to save any changes you make to the TeamXpress server.

Submitting Files to the Staging Area

Submitting Files Using SmartContext Editing

If you have been using SmartContext Editing and want to submit the file you have just edited:

1. Click the **Submit** button in the SmartContext Editing tab for the file you want to submit.

2. A dialog box will appear. Enter any comment you want to attach to the file's history, and click **OK**.

Your changes will be uploaded (if they haven't been already) and the file will be submitted to the staging area.

Submitting Files Using the TeamXpress GUI

When submitting files to the staging area, you can either submit them directly, or invoke a workflow process (via a submit job template) which will submit the files.
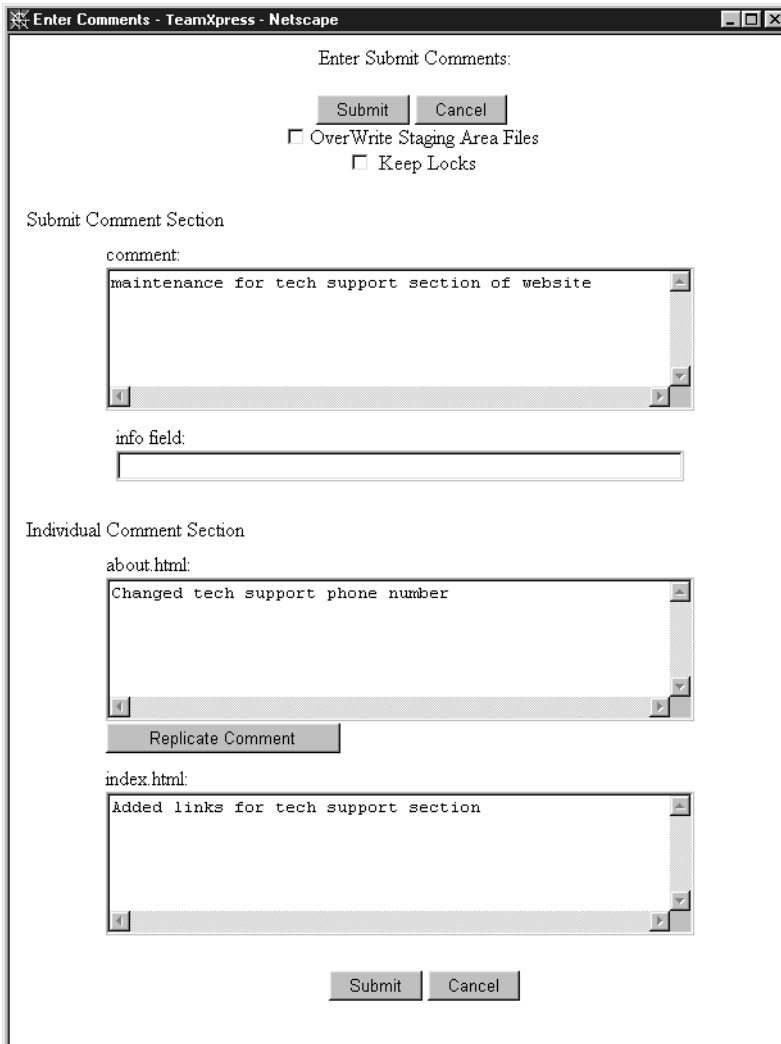
Submit job templates are configured on an individual site basis. They may perform automated tasks such as post-processing or links checking before submitting your files. To find out what submit job templates are available on your system, consult your system administrator.

The **Submit** button in the TeamXpress GUI may be configured to use either the direct submit or the workflow process submit (see below). Consult your system administrator to find out how your system is configured.

Submitting Files Directly

To submit files or a directory to the staging area (you can only submit one directory at a time):

1. Select the checkboxes next to the items that you want to submit in your workarea. If no items are selected, TeamXpress will submit your entire current directory. To submit an entire workarea, go to the top level of the workarea and do not select any checkboxes.

2. Select **File** >**Submit**--**Direct**. A Submit window will appear.

3. Enter any comments you have in the comment boxes. The Submit window contains two sections: a Submit Comments section, which consists of a section where you can enter comments for the entire Submit operation and a field where you can enter keywords, e.g. for automatic triggers, and an Individual Comments section, where you can attach comments to each file's history.

4. If you want to overwrite files and directories in the staging area with the files in your workarea, regardless of which version is newer, click the **OverWrite Staging Area Files** checkbox. If you are submitting a directory, this operation is equivalent to deleting the directory from the staging area and then submitting the directory from your workarea. Any files that are in that directory in the staging area but which are not in the directory in your workarea will be deleted from the staging area.

5. If you want to retain any locks you have on files being submitted, click the **Keep Locks** checkbox. If you do not select this option, all locks will automatically be released upon submission.

6. Click the **Submit Files** button.
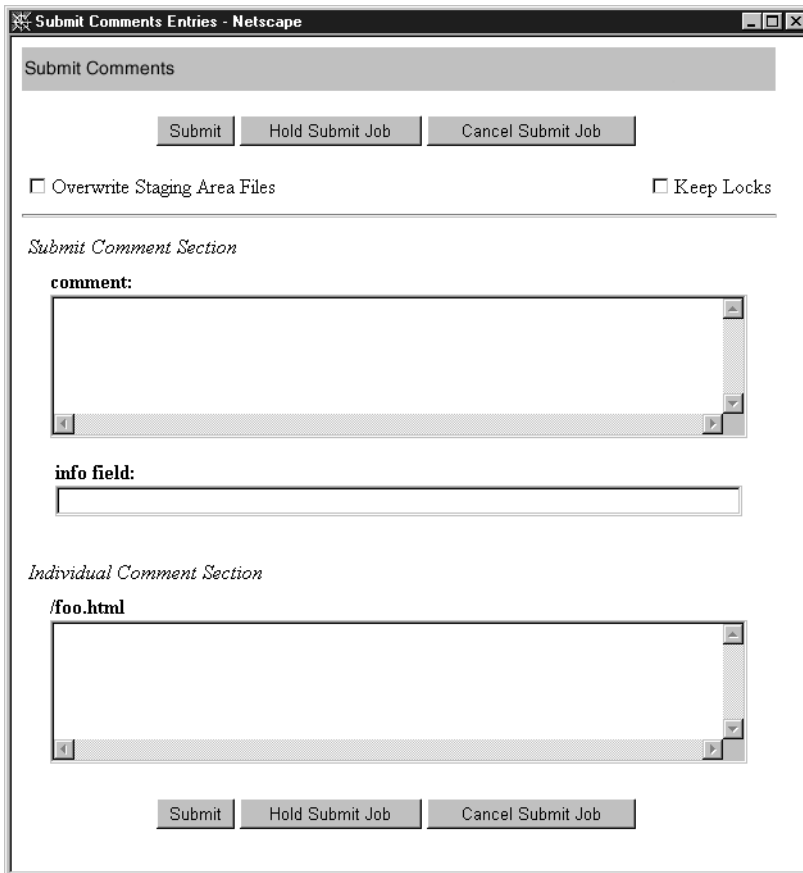
Submit Comments window

Submitting Through a Workflow Process

To submit files using TeamXpress workflow:

1. Select the checkboxes next to the items that you want to submit in your workarea. If no items are selected, TeamXpress will submit your entire current directory. To submit an entire workarea, go to the top level of the workarea and do not select any checkboxes.

2. Select **File** > **Submit**.

3. If there are multiple submit job templates available for your system, you will be asked to choose one. If there is only one, its Submit window will appear. The Submit window's appearance may vary from one job template to another. The rest of this section refers to the default submit job template.

4. Enter any comments you have in the comment boxes. The Submit window contains two sections: a Submit Comments section, which consists of a section where you can enter comments for the entire Submit operation and a field where you can enter keywords, e.g. for automatic triggers, and an Individual Comments section, where you can attach comments to each file's history.

5. If you want to overwrite files and directories in the staging area with the files in your workarea, regardless of which version is newer, click the **OverWrite Staging Area Files** checkbox. If you are submitting a directory, this operation is equivalent to deleting the directory from the staging area and then submitting the directory from your workarea. Any files that are in that directory in the staging area but which are not in the directory in your workarea will be deleted from the staging area.

6. If you want to retain any locks you have on files being submitted, click the **Keep Locks** checkbox. If you do not select this option, all locks will automatically be released upon submission.

7. Click the **Submit** button to continue with the Submit operation. You also have the option of holding the submit job and submitting the files later, or cancelling it.

Default Submit job window

After You Submit

Submitting Conflicting Files

If you are submitting a workarea or directory and there are conflicts, the Compare screen will appear. In this screen, you have the option to merge files (see page 87), overwrite your changes (see page 79), or overwrite the changes in the staging area.

To overwrite changes in the staging area with your modifications:

1. In the Compare screen, the **Overwrite** button in the Button Bar will already be selected. Select the checkboxes next to the files that you want to overwrite in the staging area.

2. Click **Submit**. This will overwrite the files in the staging area with the selected files in your workarea and submit any files that were not in conflict from the original submission.

Submitting Directories
When you submit a directory, only the files that have been changed are actually submitted (including modified files in subdirectories). For a complete list of which individual files were submitted from a workarea, go into that workarea and select **Submit Log** from the **View** menu.

Viewing Submit Logs
To learn which files have been changed in the staging area since it was last published, go into the staging area and select **View** > **Submit Log**.
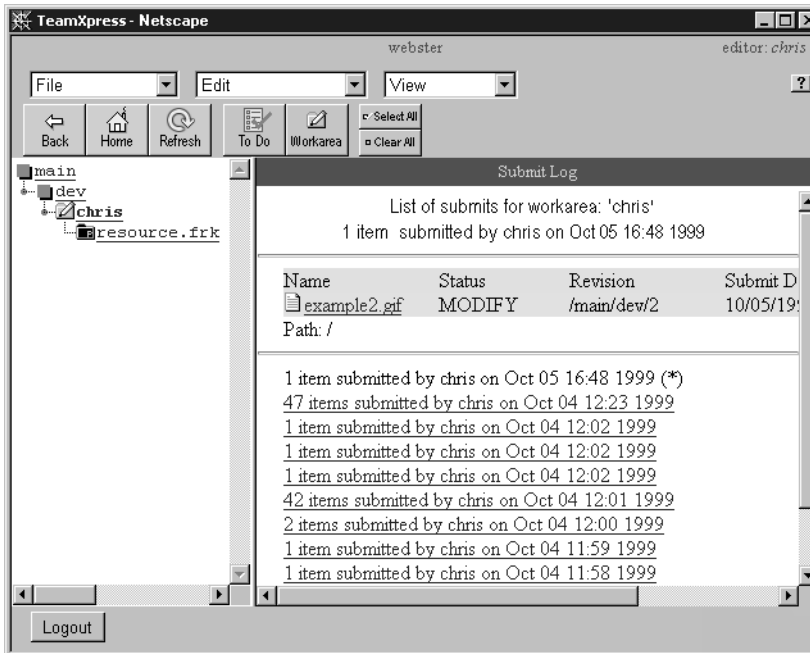
Submit Log

Updating Your Workarea

Files in the staging area can be changed by other users without ever affecting your workarea. If you want to be working on the latest versions of all the files in your branch, you will need to update your workarea from the staging area. If you want to continue working on the version of your files already in your workarea, do not update your workarea. However, if you do not update your workarea, you may encounter conflicts when you edit files and submit them to the staging area.

To update your workarea:

1. Click the checkbox next to the files or directory in your workarea that you want to update from the staging area. If no files or directory is selected, your current directory will be updated. If you are the top level of your workarea and no items are selected, your entire workarea will be updated.

2. Click the **Get Latest** button in the Button Bar, or choose **File** > **Get Latest**.

If there are no conflicts, the Get Latest command compares all of the files in the selected area with the corresponding files in the staging area and updates your workarea with the latest versions. If a file in your workarea is a newer version than the file in the staging area, it will be left alone.

If there are conflicts (corresponding files have been changed both in your workarea and in the staging area), a Compare screen will appear. For more information about the Compare screen, see page 79. Using the Compare screen, you can merge the two versions or choose one over the other (see page 79). To overwrite the files in your workarea with files from the staging area, regardless of which version is newer, select the **Overwrite** button in the Button Bar (it will turn red), then choose **Get Latest**. Use this option only if you want to throw away modifications that you have made.

If you use the **Overwrite** button to overwrite a directory, this operation is equivalent to deleting the directory from the workarea and then copying the directory from the staging area. Any files that are in that directory in the workarea but which are not in the corresponding directory in the staging area will be deleted from the workarea.

To learn what files the Get Latest command has updated in your workarea, select **Update Log** from the **View** menu. Click underlined entries in the Update Log window to see a list of the files that were updated in each Get Latest operation. Click individual filenames to view the version of the file that was submitted.

The entries are sorted by date.
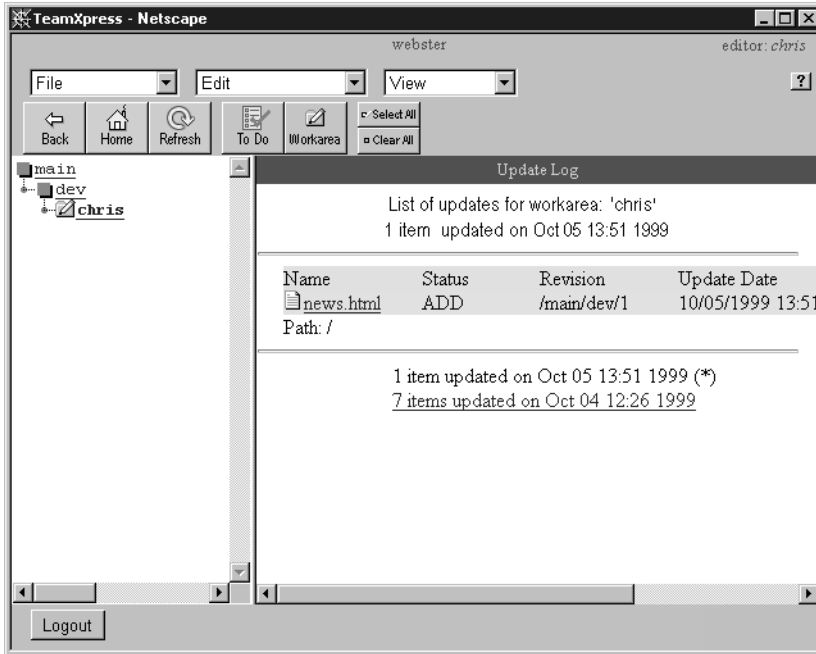
Update Log

Publishing Your Work

To create a new edition from the contents of the staging area:

1. Select **File** > **Publish** from anywhere within your branch. The Publish window will appear.

2. TeamXpress will suggest a name for the new edition. If you want to give the edition a different name, enter the name of the new edition in the **Name** box in the Publish window.
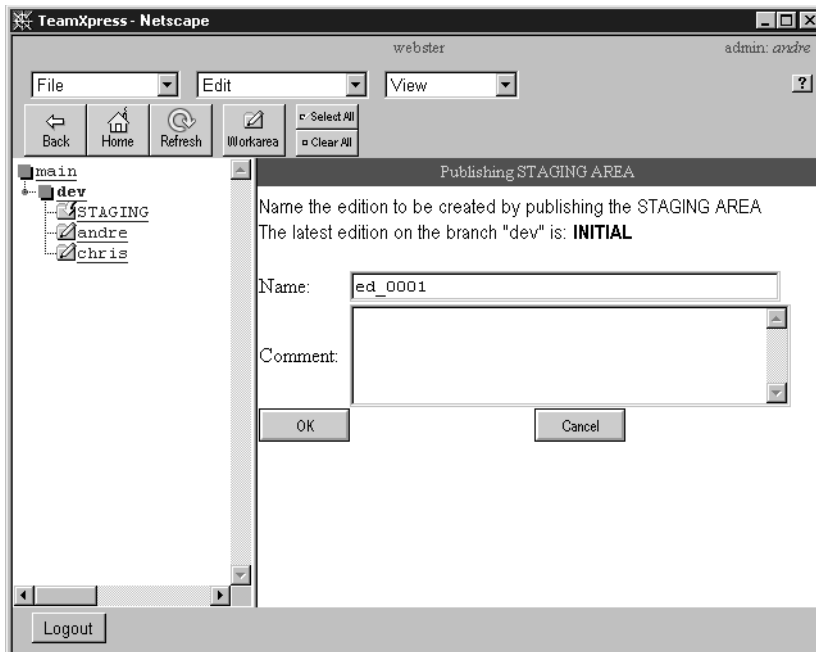
Publish window

3. Enter any comments you have in the **Comments** box.

4. Click **OK**. The staging area will be published as a new edition.

To find out which files in an edition have changed from the previous edition, go into the edition and select **View** > **Submit Log**. You can also use the Compare function to find differences between editions.

Chapter 4

Managing File Versions

Viewing File Properties

TeamXpress's File Properties feature allows you to determine basic file properties such as the size of a file, when it was created and by whom, whether you have write access to it, what exactly the permissions are, what user and group have access to it, whether you have access to the area it resides in, who the owner and group for that area are, whether it is locked (and by whom and in what workarea), whether it is part of a task, and what comments and metadata are currently attached to it.

To view the properties of a file:

1. Select the checkboxes next to the files whose properties you want to view.

2. Select **File** > **File Properties**.

3. The File Properties window will appear.

   Look in this window to find the properties you're most interested in.

The File Properties window

About the File Properties Window

Basic

Modified	Tells whether the file has been modified in the current workarea
Size	Size of the file
Creator	Username of the creator of the file
Creation Date	Date the file was created

File Security

Writable	Tells whether you can write to the file
Permissions	Access permissions for the file
Owner	Owner of the file
Group (UNIX only)	Group which has access to the file (according to UNIX permissions)

Area Security

Writable	Tells whether you can edit files in the current workarea
Permissions	Access permissions for the workarea
Owner	Owner of the workarea
Group	Group which has access to the workarea

Workflow

Job (ID)	Name and ID of the job (if any) associated with this file
Job Owner	Username of the owner of the job (if any) associated with this file

Task (ID)	Name and ID of the task (if any) associated with this file
Task Owner	Username of the owner of the task (if any) associated with this file

Lock

Workarea	Workarea (if any) in which the file is locked
Lock Holder	Username of the lock owner
Lock Time	Time the file was locked

Metadata

Metadata that has been set on this file. Metadata will vary from site to site and from file to file.

Copying Files to Other Workareas

The Copy To Area command allows you to select a version of a file or directory in a workarea, staging area, or edition and copy it to the corresponding directory in another workarea. If this workarea already contains an older version of the same file or directory, it (and, for a directory, its contents) will be overwritten. The Copy To Area command will take both the file's name and its directory path into account when copying.

To cancel a Copy To Area operation, click the name of a directory or area in the Navigation Window at any step.

To copy a file or directory:

1. Navigate through the TeamXpress file system until you have located the file or directory you want to copy.

2. Click the checkbox next to this item. If you do not select anything, TeamXpress will assume that you want to copy the entire contents of your current directory.

3. Select **File** > **Copy To Area**.

4. A Choose Area window will appear. Using this window, navigate to the workarea you want to copy the item to. To find a workarea on another branch, click the name of the branch.
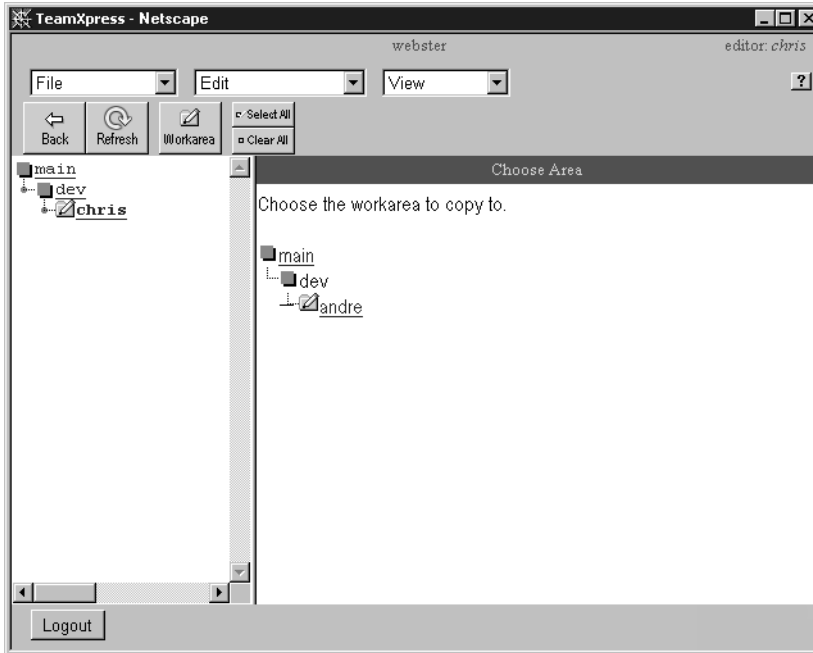
Choose Area window

5. Click the underlined name of the workarea. The item will be copied, and TeamXpress will return you to the location you were copying from. The file will appear in the new location with a 🖺 (Modified) icon.

To learn what files the Copy To Area command has changed in your workarea, select **View** > **Update Log**. Click underlined entries in the Update Log window to see a list of the files that were updated in each operation (see page 70).

Copying Over Newer Files

If you use the Copy To Area command to overwrite more recent version than the one you want to copy, one of two things will happen:

- If the file has only been modified in the destination workarea, the message "*filename* is newer in workarea *workareaname*" will appear, and the operation will fail.
- If the file has been modified in both the source area and the destination workarea, TeamXpress will take you to the Conflicts screen. From there, you can choose to overwrite one version (see page 87) or to merge the two versions (see page 87).

TeamXpress will not overwrite a newer version of a file with an older one unless specifically directed to do so. To overwrite a newer file, you must use the **Overwrite** button, as described below. Be careful when using this command, because it cannot be undone. If you use the **Overwrite** button to overwrite a directory, this operation is equivalent to deleting the directory from the destination area and then copying the directory from the source area. Any files that are in that directory in the destination area but which are not in the directory in the source area will be deleted from the destination area.

To copy over newer files:

1. Navigate through the TeamXpress file system until you have located the files or directories you want to copy.

2. Click the checkboxes next to these items.

3. Click the **Overwrite** button in the Button Bar. The **Overwrite** button will turn red.

4. Select **File** > **Copy To Area**.

5. A Choose Area window will appear. Using this window, navigate to the workarea you want to copy these items to.

6. Click the underlined name of the workarea. The files or directories you have selected will overwrite the corresponding files or directories in this workarea (directories will be copied with all their contents and all contents of the previously existing directory will be removed), and TeamXpress will return you to the location you were copying from.

Restoring Deleted Files

If you have accidentally deleted a file in your workarea and want to restore it with a file from the staging area, an edition, or from another workarea, TeamXpress will consider your deleted file to be more recently modified than the file you are trying to overwrite it with, and it will return a warning. You must therefore use the **Overwrite** command, as described above.

Comparing Files

You can compare a file or directory in any workarea, staging area, or edition to a corresponding file or directory in any other workarea, staging area, or edition. The Compare function checks corresponding files in each workarea, staging area, or edition and tells you which files have changed in one, the other, or both workareas, staging areas, or editions.

You can use this feature to see what items have changed between one edition and the next, how one person's workarea differs from another's, or whether there will be conflicts between a workarea and the staging area.

Using TeamXpress File Comparison

You can compare individual files and directories, or you can compare the entire contents of workareas, staging areas, or editions. If you are comparing individual files or directories, you can only compare one file or directory at a time. If you are comparing directories, the entire contents of the directory you select (including subdirectories) will be compared.

To cancel the Compare operation, click the name of a directory or area in the Navigation Window at any step.

Comparing Individual Files or Directories

To compare individual files or directories in a workarea, staging area, or edition:

1. Navigate into the workarea, staging area, or edition containing the item that you want to compare. Find the first file or directory that you want to compare, and select its checkbox. If no item is selected, TeamXpress will compare the entire current directory.

2. Select **File** > **Compare Any**.

3. TeamXpress will ask you to select the workarea, staging area, or edition containing the file or directory that you want to compare the first item against. Using the Choose Area window (see page 77), navigate through the site until you have found the area containing this item. If the area is on another branch, click the branch's name to access its workareas, staging areas, editions, or sub-branches.

4. Click the name of the workarea, staging area, or edition. TeamXpress will compare the first file or directory you selected with the corresponding file or directory in this location and display the results in the Compare Results window.

5. If files have only changed in one area, TeamXpress will display the results immediately. If files have changed in both areas, TeamXpress will ask you which set of results you want to view. You may switch from one set of results to another at any time by clicking the underlined text.

Comparing Entire Areas

To compare the entire contents of workareas, staging areas, or editions:

1. From the branch view, select **File** > **Compare Any**.

2. TeamXpress will ask you to select the first area that you want to compare. Using the Choose Area window, navigate through the site until you have found the workarea, staging area, or edition that you want to compare.

3. Click the name of the area that you want to compare.

4. TeamXpress will ask you to select the second area that you want to compare. Using the Choose Area window, navigate through the site until you have found the workarea, staging area, or edition. If the area is on another branch, click the branch's name to access its workareas, staging areas, editions, or sub-branches.

5. Click the name of the workarea, staging area, or edition. TeamXpress will compare the first set of files you selected with the corresponding files in this location and display the results in the Compare Results window.

6. If files have only changed in one area, TeamXpress will display the results immediately. If files have changed in both areas, TeamXpress will bring up a Choose Results window where you may choose which set of results you want to view: changes that have been made in one area, changes that have been made in the other area, or conflicts where files have been changed in both areas. You may switch from one set of results to another at any time by clicking the underlined text.

Comparing Files with the Staging Area

To compare files or directories in a workarea or edition with the staging area on that branch:

1. In the workarea or edition, find the file or directory that you want to compare, and select its checkbox. If no item is selected, TeamXpress will compare the entire current directory.

2. Click the **Compare** button in the Button Bar.

3. TeamXpress will automatically compare the first item you selected with the corresponding file or directory in the staging area on that branch and display the results in the Compare Results window.

4. If files have only changed in one area, TeamXpress will display the results immediately. If files have changed in both areas, TeamXpress will ask you which set of results you want to view. You may switch from one set of results to another at any time by clicking the underlined text.

Viewing the Results of Your Comparison

If files have changed in both areas, TeamXpress will bring up a Choose Results window where you may choose which set of results you want to view: changes that have been made in one area, changes that have been made in the other area, or conflicts where files have been changed in both areas. You may switch from one set of results to another at any time by clicking the underlined text. Note that the sets of files are non-overlapping. That is, a link for changes in one area does not include the files that conflict with the other area.

For example, the following screenshot shows the results of comparing workareas `andre` and `chris`. The Compare Results screen contains a line that says, `No changes in "chris."` This means that there are no changes in `chris` other than those changes that conflict with `andre`.
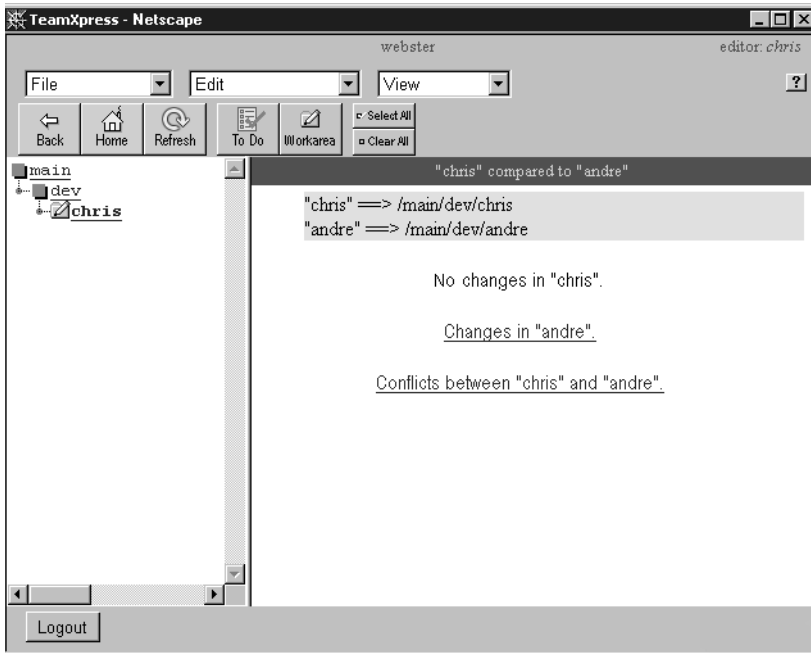
Choose Results window

In the Compare Results window, unchanged files are marked with an ▤ (Unchanged) icon.

Modified files or newer versions of a file are marked with a ◩ (Modified) icon or with one of the Modified icon variants, as appropriate (see "TeamXpress Icon Reference").

Deleted files and directories are marked with a ◪ (Deleted) icon.

From the Compare Results window, you can see information about the two versions, such as modification date, user information, and version. You can display the two versions of a file side by side, either as it will be displayed in a browser window (see page 85), or as source code (see page 86). You can also copy files from one area that you are comparing into the other (see page 87), or merge the two versions (see page 87).
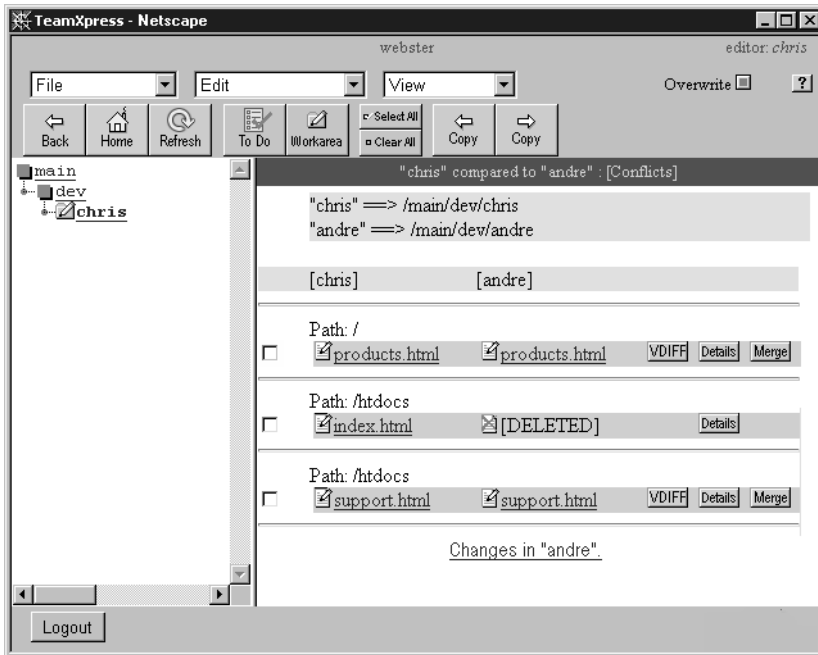
Compare Results window

Viewing Version Details of Compared Files

To see information such as modification date, user information, and version on two versions of a file that you have compared, click the Details button next to those files in the Compare Results window. A popup window will appear with the information for each version of the file.

Compare Details window

Visually Comparing Files

When you are comparing files in different workareas, staging areas, or editions, you can view corresponding files side by side, in the context of their respective versions of the Web site. Click the **VDIFF** button next to the pair of corresponding files you want to view in the Compare Results window. A Visual Difference window will appear, displaying the two versions side by side.
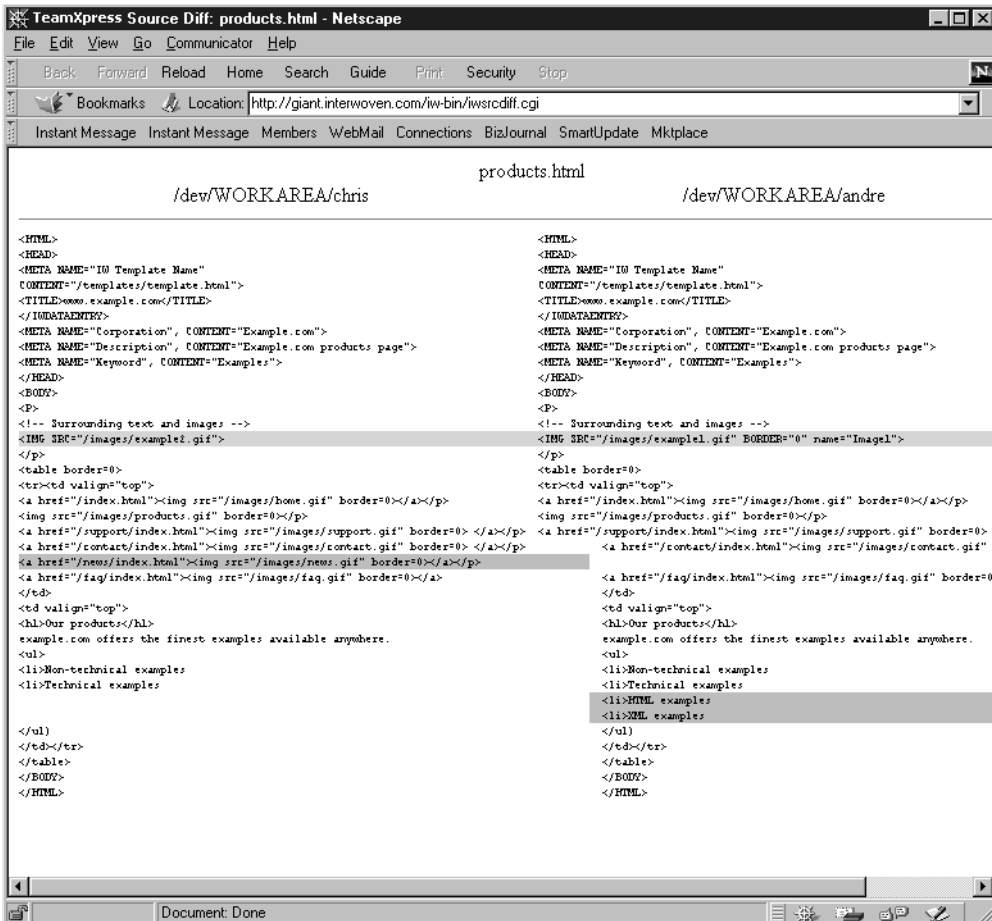
You can also use this function with SmartContext Editing: select **Advanced** > **File** > **Vdiff with Staging**, and a Visual Difference window will appear that displays the current version of the file side-by-side with the version in the staging area.
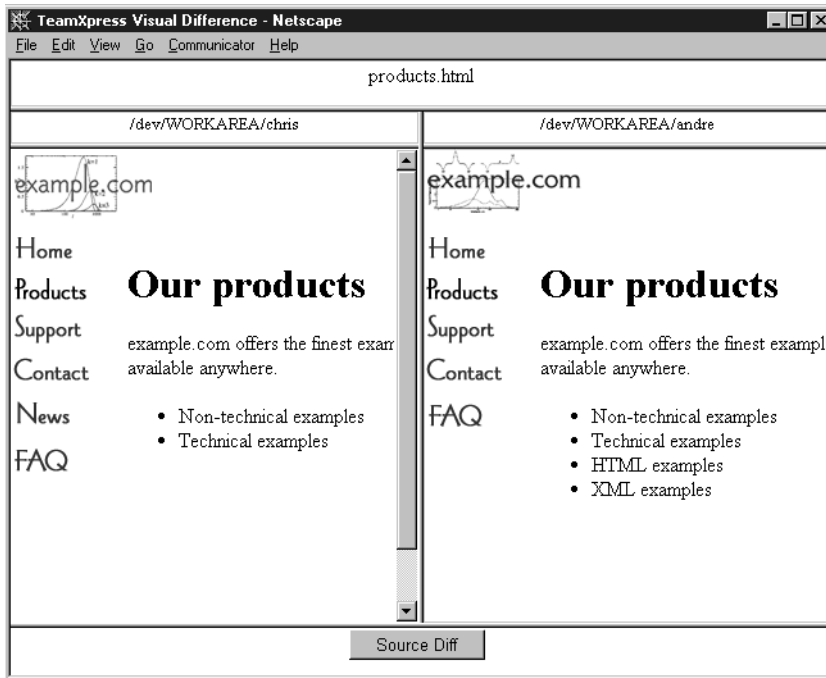
Visual Difference window

Visually Comparing Source Files

To view the HTML or text source of the two documents, click the **Source Diff** button in the Visual Difference window. A Source Diff window will appear, displaying the source of the two documents side by side. Changes will be highlighted in red. You can jump from one change to another using the buttons at the bottom of the screen. Source Differencing is only available for text files, and will not work for other formats such as graphics or sound files.

Source Difference window

Copying Files From the Compare Results Window

To copy files from the Compare Results window:

1. Select the checkboxes next to the files you want to update.

2. Click the [Copy] (**Copy Left**) or the [Copy] (**Copy Right**) button in the Button Bar.

If you click the **Copy Left** button, the selected files in the right-hand column will be copied over the files in the left-hand column. If you click the **Copy Right** button, the selected files in the left-hand column will be copied over the files in the right-hand column. The **Copy Left** and **Copy Right** buttons are only available when you are comparing one or more workareas.

If you want to copy older files over newer or conflicting versions, you will need to click the **Overwrite** button before clicking one of the **Copy** buttons. The **Overwrite** button is automatically turned on when you view the Conflicts section of the Compare Results window.

Merging Files

If two files are in conflict and you want to combine both sets of changes, you can use Merge to reconcile them. If you are using Netscape 4.07 or later or Internet Explorer 4.01 or later, you do not need to install any additional software to use Merge. If you are using an earlier browser, you must install a Java plug-in and Java class files.

Merging is only available for text files, and will not work for other formats such as graphics or sound files.

Installing Merge

Netscape

For versions of Netscape earlier than 4.07:

1. The first time you click the **Merge** button in the Compare Results window, a dialog box will appear telling you that you need to install the Java Plug-in, which is needed for Merge. Click **Get the Plug-in**.

2. A new browser window will appear, taking you to the Plug-in Download page. On this page, click the **Java Plug-in Download** link. Follow directions to download the plug-in.

3. Close the Java Download browser window, and double-click the downloaded file. The Java Plug-in will install itself on your computer.

4. In the TeamXpress window, click the **Merge** button again. A dialog box will appear, telling you that if you want to bring up Merge faster, it needs to install some more software. Click **OK**.

5. Click the **Merge** button again. A Java Security window will appear, asking if you want install software on your computer. Click **Grant**.

6. Merge software will install itself on your computer.

Internet Explorer

For versions of Internet Explorer before 4.01:

1. The first time you click the **Merge** button in the Compare Results window, a dialog box will appear asking if you want to install Merge software. Click **Yes**.

2. Another dialog box will appear, asking if you want to permit Sun to install software on your computer. Click **Grant**.

3. Merge will install itself on your computer, and the Merge window will open.

About Merge

Merge compares each of the two conflicting file versions against their common ancestor, and is therefore able to determine which version contains a particular change. This allows Merge to intelligently recommend which changes to incorporate into the merged file.

For example, Chris and Andre might both change the same file (`index.html`) in their own private workareas. The common ancestor of this file might reside in an earlier edition (`Edition_1`), as shown below.

In this case, Merge would check Version 2+ of `index.html` in both workareas against Version 2, which happens to be located in `Edition_1`. This way, Merge can tell which lines in each new version have changed from the original version. If a line changed in Andre's version but not in Chris's, Merge will recommend that you accept that change. And if a line changed in Chris's version but not in Andre's, Merge will recommend that you accept that change, as well. However, if a line changes in both versions, then Merge will ask you to reconcile the change.

Modified file in conflict   Common ancestor
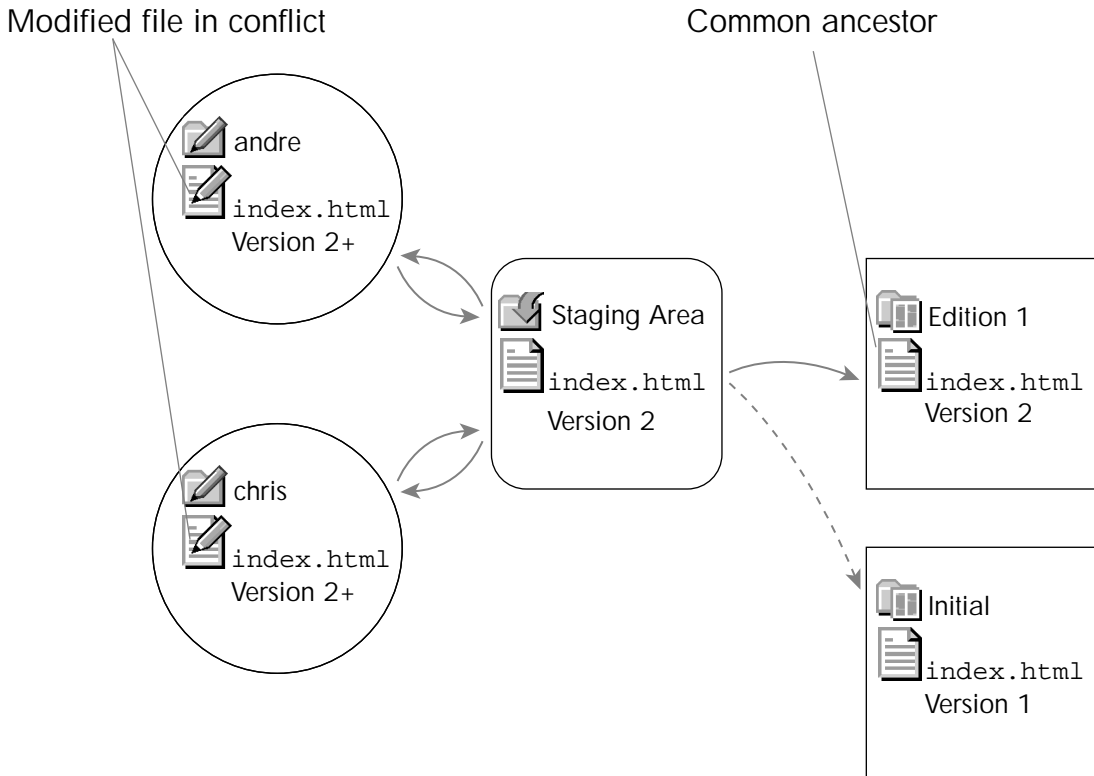
Branch structure showing the version history of a file that has been modified in two workareas

Using Merge

To use Merge, click the **Merge** button next to the two files in the Compare Results window. The Merge window will appear, showing the changes you have made, the changes another user has made, the common ancestor of the file, and the file that results from reconciling changes.

Your changes

Other user's changes

Common ancestor

Merged changes
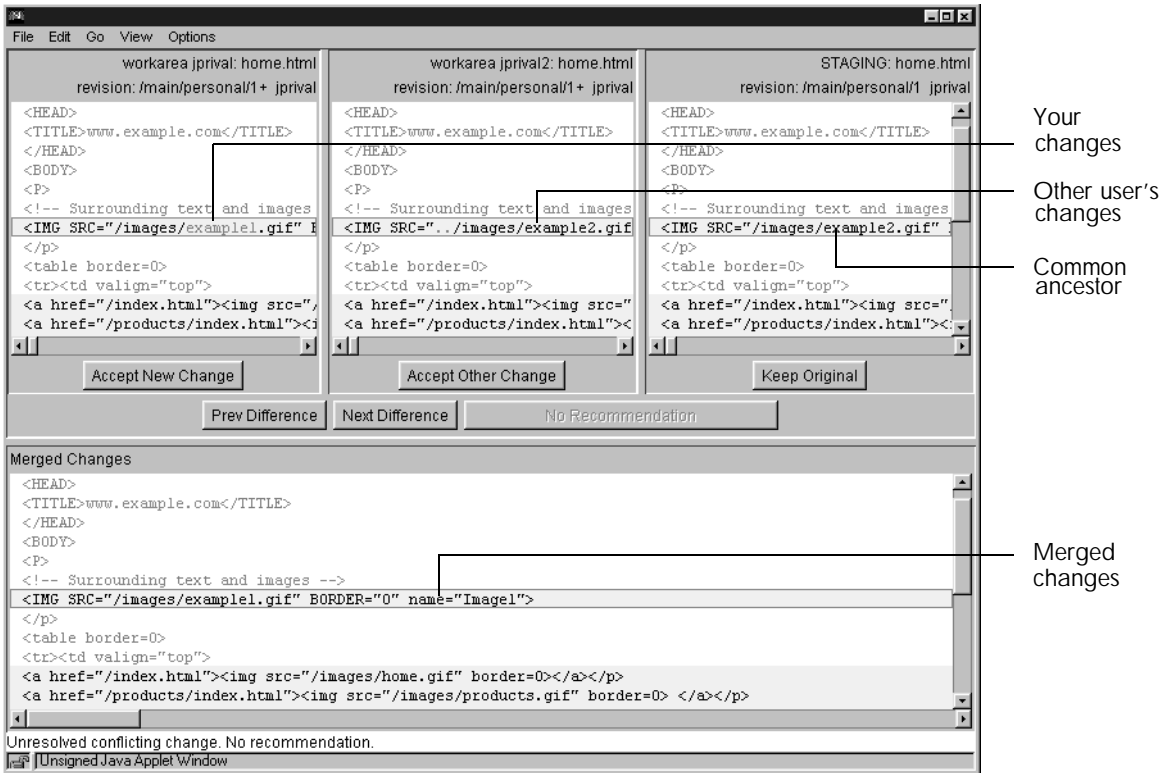
The Merge window

You can also view a subset of these files by selecting any of the options in the **View** menu.

Differences found between the three versions will be highlighted in red. The lines containing the differences will be colored gray. You can use the **Next Difference** and **Prev Difference** buttons to jump from difference to difference, or you scroll through the files using the scroll bars.

If a line has been changed in only one version, when you select that difference it will be highlighted strongly, as shown below. The corresponding lines in the other versions of the file will be highlighted weakly:

The Merge window, showing a change made to a single file

If a line has been changed in both versions, when you select that difference the corresponding line will be highlighted weakly in all versions, as shown below:
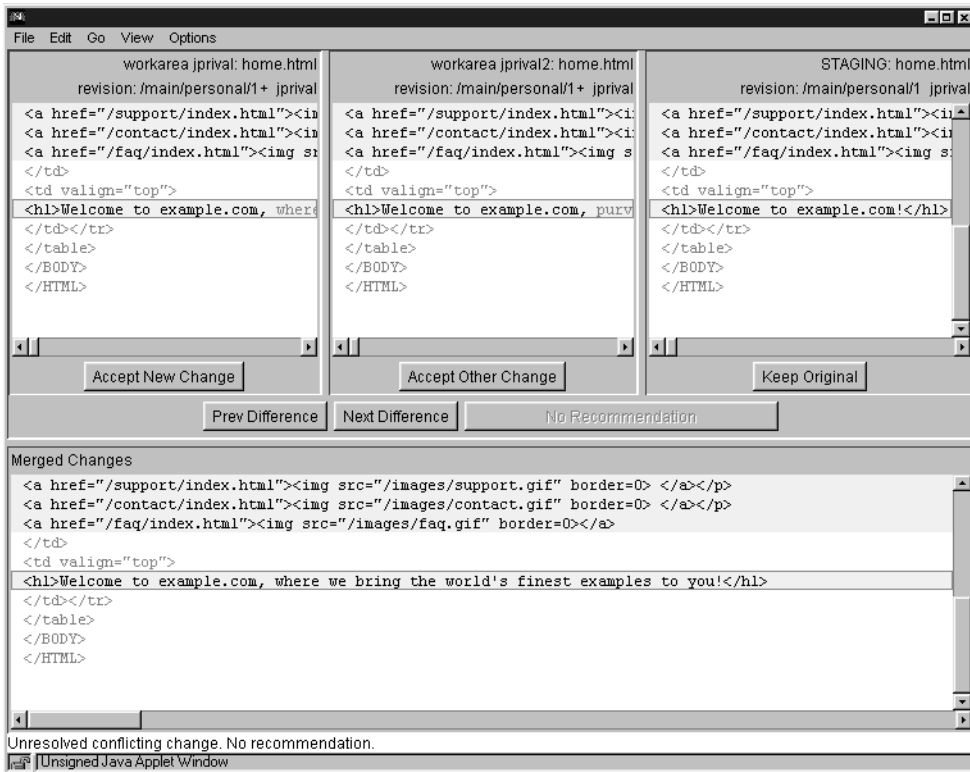
The Merge window, showing changes made in both files

For each change, you have three choices:

- Click the **Accept New Change** button to keep the change you have made, discarding any changes that have been made to the corresponding line in the other version.
- Click the **Accept Other Change** button to keep the change that the other user made, discarding your own changes.
- Or, click the **Keep Original** button to discard the changes that both you and the other user made to the file.

The Merged Changes window will be updated to reflect your decisions. After you have chosen which change to keep, you can still go back and choose another option. You can also manually edit the file in the Merged Changes window.

Once you have resolved all the differences between the different versions of the file, you can save it and exit Merge. To save your file and exit, select **File** > **Save and Exit**. The merged file will be saved in your workarea, and a backup copy of the original file will be placed in your workarea under the name *filename*.original.

Listing Modified Files

To view a list of all the files that have been modified in a workarea:

1. Go into the workarea.

2. Select **View** > **List Modified**. A list of all files that have been modified since the last time they were submitted will appear, including statistics such as size, modification date, and the username of the person who modified them.

To view a list of all the files that have been modified in multiple workareas:

1. Go to a view of the branch containing these workareas.

2. Click the checkboxes next to the workareas whose modified files you want to view.

3. Select **View** > **List Modified**. A list of all files in these workareas that have been modified since the last time they were submitted will appear, including statistics such as size, modification date, and the username of the person who modified them.

To view a list of all the files that have been modified on a branch:

1. Go to the branch view.

2. Select **View** > **List Modified**. A list of all files on the branch that have been modified since the last time they were submitted will appear, including statistics such as size, modification date, and the username of the person who modified them.

Using this list, you can select files in order to view their histories (see page 99), lock or unlock them (see page 96), or submit them (see page 64).
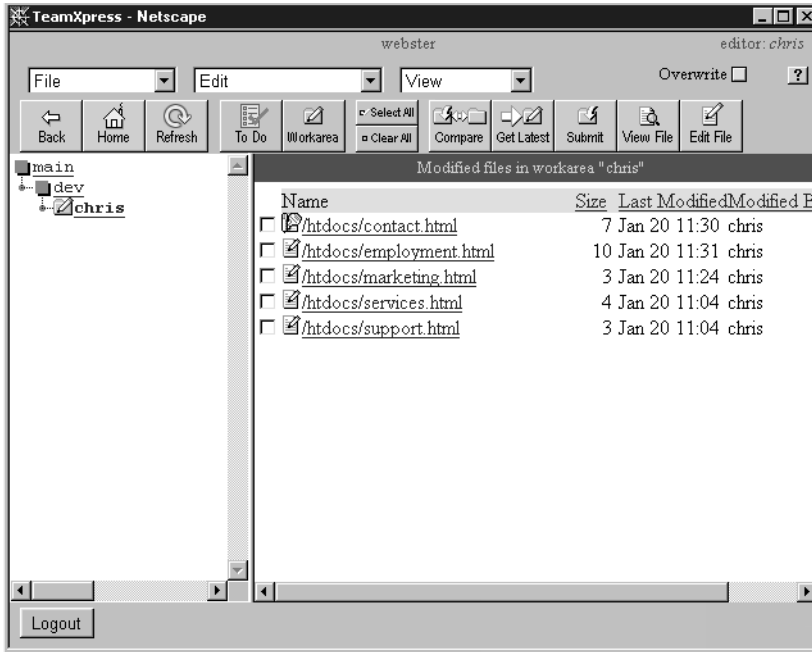
List Modified Files window

Locking Files

TeamXpress supports three different types of file locking: Submit Locking, Optional Write Locking, and Mandatory Write Locking. Ask your Branch Administrator which type you are using. Different branches on your Web site may use different types of locking. All workareas on a branch use the same type of locking.

In the browser interface, the TeamXpress commands New File, Import File, Rename, and Edit all automatically lock the files they are operating on. Some tasks may also try to lock files.

When a file is locked, it is locked for a particular workarea. That is, all users who have access to that workarea can edit the file. In addition, all users who have previously modified the file can edit it in their workareas (but not lock it).

Submit Locking

Submit locking means that if a file is locked, only users within the workarea where it is locked may submit the file to the staging area. Users are still allowed to edit the file within the context of other workareas but may not submit it until the user who holds the lock has submitted his version or manually released the lock.

If a file is not locked, anyone may submit it.

If someone else has the lock on a file that you are editing, and you try to submit a workarea or directory containing your version after the lock holder has submitted the file and released the lock, the Compare Results window will appear showing the conflicting versions of the file. From this window, you can choose to merge the two files, or to overwrite the version in the staging area with your own.

If someone else has locked a file, and you edit it through the TeamXpress GUI, a warning will appear:

You can continue to edit the file, but you will have to merge your changes with those of the lock owner after he submits it.

Write Locking

Write locking means that a locked file may only be edited in the workarea where it is locked. Users in other workareas may not edit the same file even within the context of their own workareas, but they may view a read-only copy if they have the necessary permissions. Write locking may be optional, in which case the user may choose whether or not to lock the file that he edits, or mandatory, in which case a user cannot edit a file without locking it first. Under Mandatory Write Locking, all files in a workarea are read-only until a user locks them for editing. Once you've modified a file while holding a lock, you will be able to continue to modify the file even after releasing the lock. Once you submit the file, it will become read-only again.

If you edit an unlocked file, and somebody edits the file at the same time but in a different workarea, the second person to submit the file to the staging area will have a conflict and will need to either merge the two versions (see page 87), overwrite the version in the staging area with his own, or overwrite his own version with the version in the staging area (see page 78).

Locking and Unlocking Files

To lock files:

1. Click the checkbox next to the file or files that you want to lock in your workarea.

2. Select **Edit** > **Lock**.

3. A Lock window will appear. Type any comments you have in the comment box next to each item.

4. The Lock function will automatically compare the version in the workarea and the version in the staging area, and take the most recent. If you want to keep the version in your workarea, whether or not it is newer, deselect the **Get Latest** checkbox.

5. Click **OK**. TeamXpress will lock the files.

To unlock files:

1. Click the checkbox next to the file or files that you want to edit in your workarea.

2. Select **Edit** > **Unlock**.

Viewing Locks

To list locks in your workarea:

1. Go into your workarea.

2. Select **View** > **List Locks**. A list of all files that have been locked in your workarea will appear.

To list locks in multiple workareas:

1. Navigate to the branch view of the branch containing the workareas.

2. Click the checkboxes of the workareas in question. If you are in the branch view and you do not select any checkboxes, TeamXpress will display all the locks on that branch.

3. Select **View** > **List Locks**.

To list all locks on a branch:

1. Go to the branch view.

2. Select **View** > **List Locks**. A list of all locked files on the branch will appear.

A (Key) or (Modified Key) icon is displayed next to files that are locked in your current workarea.

A (Locked) or (Modified Locked) icon is displayed next to files that are locked in other workareas.

Locking Files and the Overwrite Button

If you click the **Overwrite** button and then try to lock a file, TeamXpress will take the version of the file in the staging area regardless of whether or not it is newer than the version in your workarea, copy it into the workarea, and lock it (if the file is not already locked).

Viewing File Histories

TeamXpress's History feature allows you to view any previous version of a file, along with such statistics as dates of modification and usernames of the people who modified the file. Further, it allows you to revert to any previous version of the file. History only displays versions that have been submitted to the staging area, and it does not display sibling versions of the file that may appear on other branches.

To view the modification history of a file or files:

1. Click the checkboxes next to those files in your workarea.

2. Select **View** > **History**. A Version History window will appear, displaying statistics such as revision ID, the area that contains that version of the file, size, modification date, comments that were attached at the time of submission, and the username of the person who submitted the files. For each file, the version at the top of the list is the version that currently appears in your workarea.
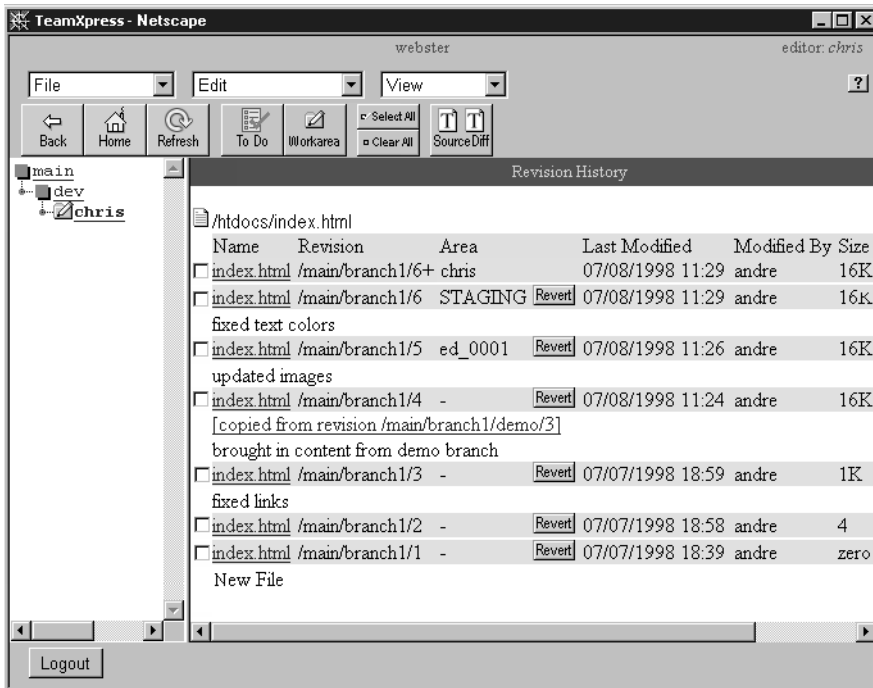
Version History window

The revision ID is unique for each version of a given file, and it has the format *branchpath/ versionnumber*, where *branchpath* is the path to the branch (e.g. main/branch1) and *versionnumber* is the number of the revision of the file on that branch. If you copy the file to another branch, it will have a different version number there. A + after the version number means that it is a version that has been modified in a workarea but not yet submitted to the staging area.

If this file has been copied from another branch, it will be noted in the entry for the version that was copied. You can click the link to see the revision history of the file on the other branch.

You can view older versions of files by clicking their underlined file names.

Comparing Versions

You can compare the source of any two versions of a text file, side by side, using Source Differencing.[1]

To compare two versions of a file:

1. In the History window, click the check boxes next to the two versions you want to compare.

2. Click the **Source Diff** button in the Button Bar.

3. The Source Differencing window will appear. You can jump from difference to difference by clicking the **Prev Difference** and **Next Difference** buttons.
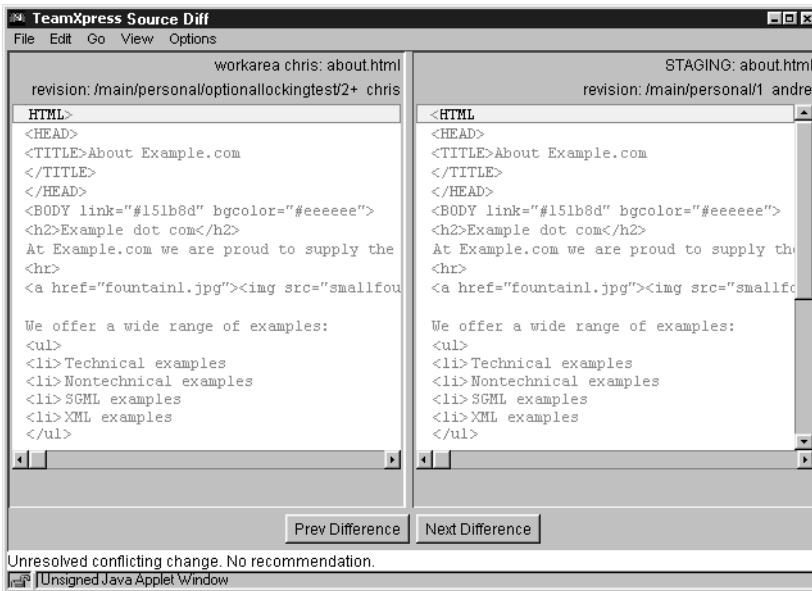
Version History Source Differencing window

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1. Requires a browser that will support Merge. See "Choosing a Browser" on page 16.

Reverting to an Older Version

The Version History window will allow you to revert to any previous version of a file that appears in the window. This version will then appear at the top of the History list. This type of modification, like all modifications, does not become a permanent part of the file's history until it is submitted to the staging area. Therefore, you can revert to an older version and view it in the context of the current Web site, then go back to a newer version.

If you have a modified version of the file in your workarea and you revert it, the modification will be lost. Revert will overwrite the file, and you will only be able to go back to a version that has been submitted to the staging area.

To revert a file to an older version:

1. In the Version History window, click the **Revert** button next to the version you want to revert to. A confirmation dialog box will appear.

2. Click **OK**.

TeamXpress will return you to the Version History window, showing the change that you have made. The file in your workarea will be reverted to the selected version.
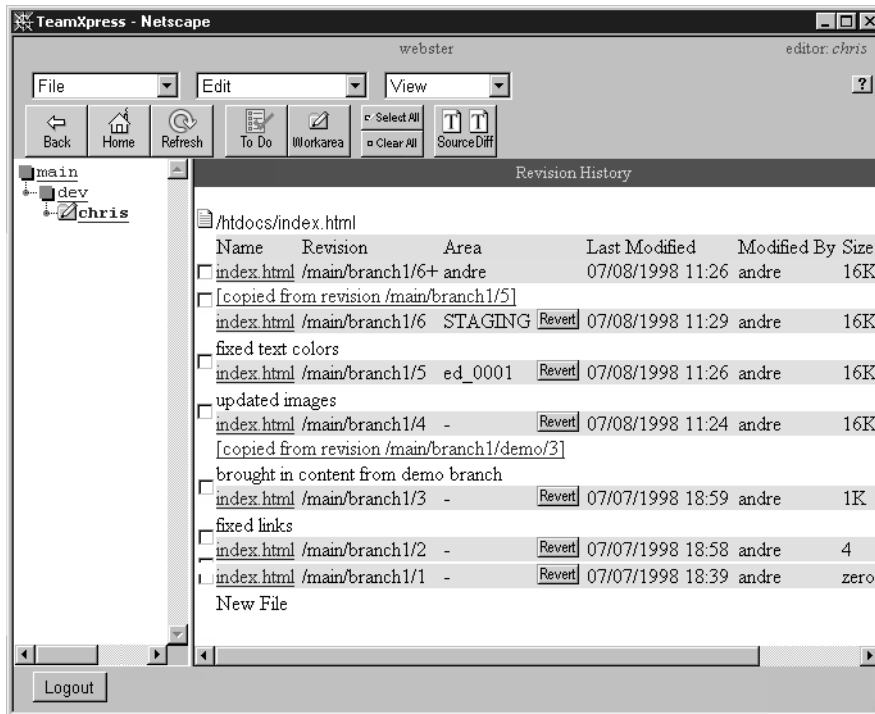
Reverted file in the Version History window

Marking Files and Directories Public or Private

By default, files in your workarea are public. That is, they can be submitted to the staging area, so that other users can access them when they update their workareas.[1] Private files are files in your workarea that are not made available to other workareas. They are ignored during all submissions to the staging area and when you use Copy To to copy files from your workarea to another location. However, private files may be overwritten if you copy files into your workarea or use the Get Latest command. To deliberately overwrite a private file, click the **Overwrite** button before a Copy To or Get Latest operation.

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1. You can only edit a file if you have permissions, whether the file is public or private.

You can also mark a directory as private, and everything inside the directory will be treated as private when you are performing a Submit, Get Latest, Compare, or other operation on the directory. However, if you go inside the directory and perform these operations on the individual files and directories that it contains, they will not be treated as private unless they are specifically marked so.

For example, if you submit a directory that contains a private directory to the staging area, the private directory and all of its contents will not be submitted. However, if you go inside the private directory and submit any public files or directories, they will appear in the staging area with the same directory path that they have in the workarea.

To make a file or directory private:

1. Click the checkboxes next to the files or directories that you want to make private in your workarea.

2. Select **Edit** > **Private**.

A ▨ (Private File) icon appears next to each file that you have selected, signifying that the file is private.

A ▨ (Private Directory) icon appears next to each directory that you have selected, signifying that the directory is private.

To make private files or directories public:

1. Click the checkbox next to the file or files that you want to edit in your workarea.

2. Select **Edit** > **Public**.

All files not marked with the ▨ or ▨ icons are public by default.

Autoprivate

Autoprivate may or may not be implemented on your system. Autoprivate automatically marks certain files in your workarea as private, so that they won't be propagated into the staging area and editions. Examples of files that Autoprivate may mark as private are: temporary files, backup files, and resource forks. Autoprivate is configured by your system administrator on a system-wide basis.

Deleting Files and Directories from the Staging Area

The staging area is read-only, so if you submit a file in error, you cannot delete it directly.

To delete a file from the staging area:

1. Delete the file from your workarea.

2. List modified files in that workarea (see page 94). The deleted file in your workarea will have a ⊠ (Deleted File) icon.

3. From the list of modified files, select the deleted file. Click the **Submit** button in the Button Bar or select **File** > **Submit**.

To delete a directory from the staging area:

1. Delete the directory from your workarea.

2. List modified files in that workarea (see page 94). The deleted directory in your workarea will have a ⊠ (Deleted File) icon.

3. From the list of modified files, select the deleted directory. Click the **Overwrite** button in the Button Bar, then click the **Submit** button or select **File** > **Submit**.

Setting Metadata

Metadata capture may or may not be implemented on your system.

You can set metadata on a file or set of files via the GUI. Different files may require different types of metadata to be set (this may be configured on an individual basis). Information about configuring rules for capturing metadata is available in *Administering TeamXpress*.

You can also use the `iwextattr` command-line tool to set metadata (extended attributes).

INTERWOVEN

To set metadata through the GUI:

1. Select the check boxes next to the files you want to set metadata on, then select **File** > **Metadata**. The TeamXpress Metadata window will appear.
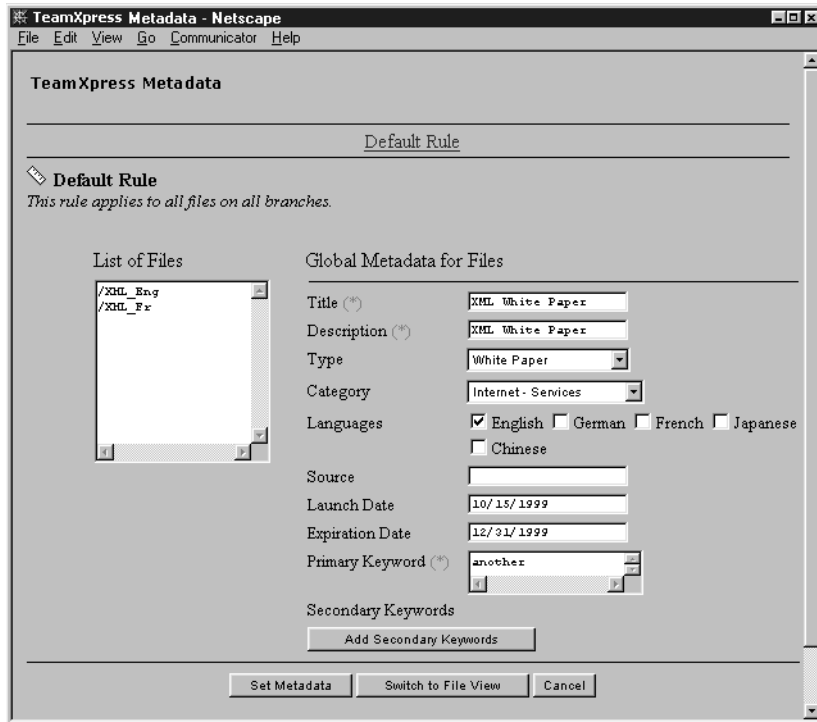
Metadata Capture window—Rules view

2. The initial window that appears allows you to set metadata on all the selected files, according to the rules that have been configured for those files. All the files will have the same metadata.

3. To set different metadata on different files, click the **Switch to File View** button in the Button Bar. The Metadata File view will appear.

Metadata Capture window—File view

If you want to set similar metadata on a group of files, set the metadata in the Rules view, then switch to the File view to make any necessary changes in individual files' metadata.

4. When you are finished setting metadata, click **Set Metadata**.

Searching by Metadata

Metadata search may or may not be implemented on your system.

You can search for files based on metadata set for them. For instance, if a file's metadata categorizes it as a "Press Release" and associates the key words "July" and "Acquisition" with it, then a search based on any one or any combination of those values retrieves that file (provided that document type and keywords are configured as searchable attributes).[1] A metadata search must be conducted within a workarea and is recursive through the selected directory and its subdirectories. Text fields in search forms are case-sensitive.

To search metadata through the TeamXpress GUI:

1. Within your workarea, navigate to the directory where you want to begin your search.

2. Select **View** > **Search Metadata** (located past the third separator in the menu).

The TeamXpress Metadata Search window appears in a new browser window.

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1. Note that some metadata attributes may be set by your administrator as non-searchable. Therefore, the fact that you can set a particular metadata attribute on a file does not necessarily mean you can search against that attribute.
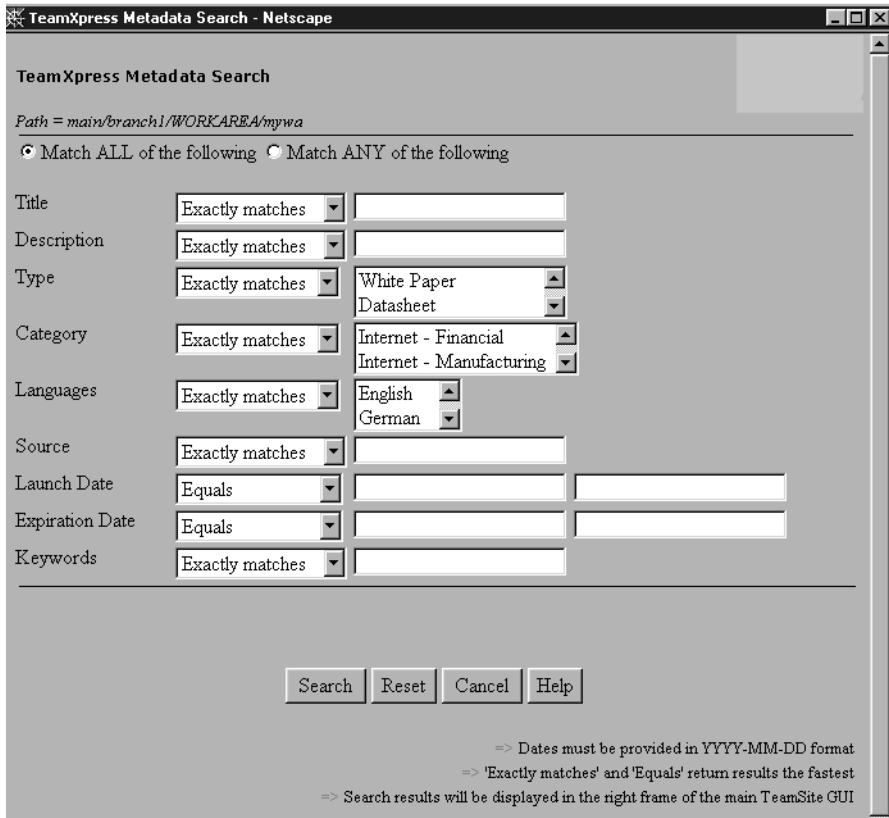
TeamXpress Metadata Search Window

3. Decide whether you want your search to match all or any of your criteria and select the appropriate radio button at the top of the TeamXpress Metadata Search window.

4. Set the criteria for your search. You may set just one or several search criteria. Focus your search by selecting operators from the drop down menus. Also, remember that text fields are case-sensitive.

   Note that dates must be entered in YYYY-MM-DD format with dashes between year, month and day. Also, when you use the **Between** operator for a numerical range, you must enter a starting value in the first field and an ending value in the second. When you use operators other than **Between** you need only enter a value in the first field.

5. When you have set your criteria, click **Search**.

The results display in the right frame of the main TeamXpress GUI. Although the results display in order by file name, be aware that regardless of where you initiate your search the relative path from the workarea to the file is included in the file name. For example, a search hit that retrieves a file named `Zeus.html` in a directory named `Apollo` in a workarea named `Janus` displays the file as `/Apollo/Zeus.html` even if the search was initiated in `Apollo`.

Chapter 5

Managing Workflow Tasks and Jobs

TeamXpress workflow begins when a user creates a job, based on a *workflow template*. A workflow template describes a particular workflow model. For information about configuring workflow templates, consult *Administering TeamXpress*.

The user who creates the job specifies the parameters of this job, such as the users who are to perform specific tasks, the workarea a task is to take place in, and the files associated with a task.

The users who are assigned specific tasks may be notified by email (if the workflow template is configured to do this) or by checking their To Do lists in the TeamXpress GUI.

When users complete tasks, they send them to the next step of the workflow process by selecting a transition. If the task is a decision point within this workflow model, they may need to select from several possible transitions (e.g. if the task is an approval task, they will need to decide whether to approve or reject the file).

When all the tasks in a job have finished, the job will no longer appear in the TeamXpress GUI.

Managing Tasks

Viewing Your To Do List

To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. TeamXpress will take you to the To Do list in the Workflow view and show you all the tasks and jobs that are assigned to you. You can filter your list by using the drop-down menus in the title bar.
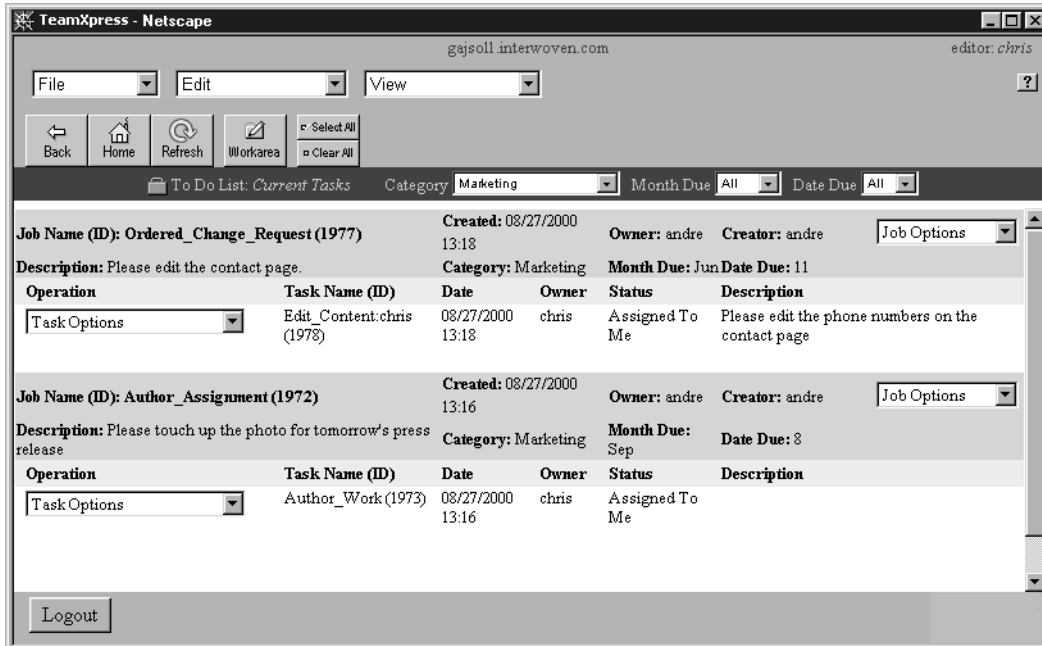
A To Do list using filtering

The To Do List defaults to a maximum of 55 jobs per page. If you have more than 55 jobs, navigation buttons at the bottom of the screen allow you to view the other jobs.

The To Do list gives you two new menus: **Job Options** and **Task Options**. These menus allow you to get further information on tasks or jobs, edit the attributes of a job, perform tasks (see), edit tasks (see page 115), or complete tasks (see page 120).

Viewing Task Details

To view the Task Details window, select either **Start Task** or **Edit Task** from the **Task Options** menu.

TeamXpress 4.5 includes all custom **File** menu items in the **File Options** drop-down list for each file listed in the Task Details screen. These custom menu items are configured by your administrator during the installation process. Custom menu items for other menus (**Edit** and **View**) are not included in the Task Details screen.

Performing Tasks

TeamXpress workflow includes many kinds of tasks. Tasks may require you to add files to the task, edit files or set metadata, or they may be performed by external programs that require no user input. Some tasks may require review and approval or rejection (these tasks are often marked as read-only).

To perform a task, select **Task Options** > **Start Task**. If the task involves file operations such as editing or adding files, or task operations such as approving files, the Task Files window will appear. Do these things as described elsewhere in this manual (see page 113 for information on editing files, page 116 for information on adding files, and page 120 for information on approving tasks). When you are finished, you will need to complete the task (see page 120).

Tasks performed by external programs often do not require user input, and may run invisibly to the user. Some automated tasks may require user input, in which case a separate form will appear when needed for data entry. When you select **Task Options** > **Start Task**, the task window will appear. Enter information as it directs you.

Editing Task Files

To edit a file in a task, go to the Task Details page (select **Task Options** > **Start Task** from your To Do list). Locate the file you want to edit, and select **File Options** > **Edit File/Data Record**. Edit the file as described in "Editing Files" on page 54.
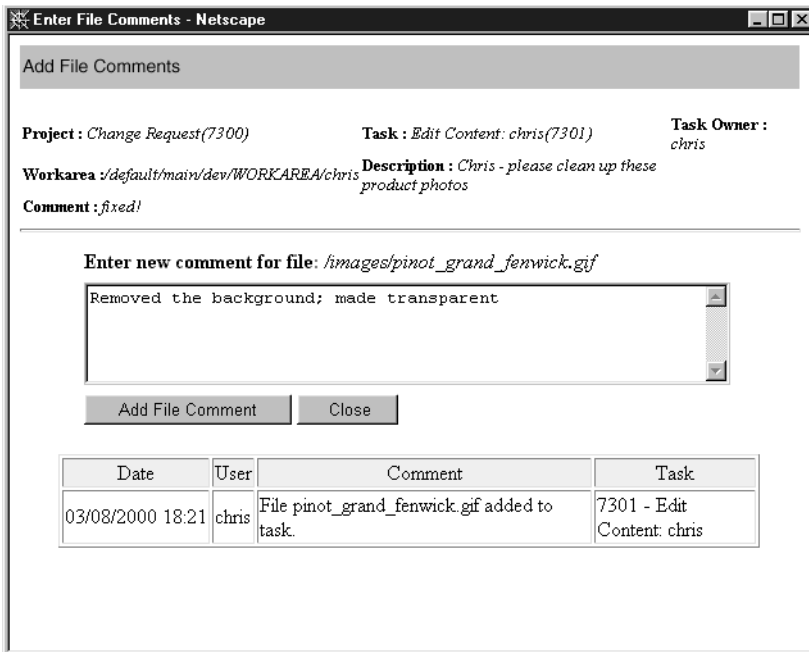
Adding Comments to Task Files

At any point in a task, you can add information in the form of comments on the files contained in the task. These comments may convey information to other users involved with the job (e.g. content contributors or approvers).

To add a comment to a task file:

1. Go to the Task Details page (select **Task Options** > **Edit Task** from your To Do list).
2. Locate the file you want to add the comment to. Select **File Options** > **Edit Comment**.

3. The File Comments page will appear, containing a list of the task's existing comments at the bottom of the page, and a text box at the top of the page. Enter your comments in the text box and click **Add File Comment**.

4. You will be returned to the File Comments page, where you can enter another comment. To exit this page, click the **Close** button.

The File Comments page

Renaming Task Files

To rename a file in one of your tasks:

1. Go to the Task Details page (select **Task Options** > **Edit Task** from your To Do list).

2. Locate the file whose name you want to change. Select **File Options** > **Rename**.

3. A dialog box will appear. Type the new name into the space provided. Click **OK**.

   The file will appear in the Task Details page with the new name. A deleted file with the old name will also appear in the Task Details page, for future submission to the staging area.

Editing Tasks

To view task information or edit tasks:

1. Go to your To Do list and locate the task you want to view.

2. Select **Task Options** > **Edit Task**. The Task Details window will appear.
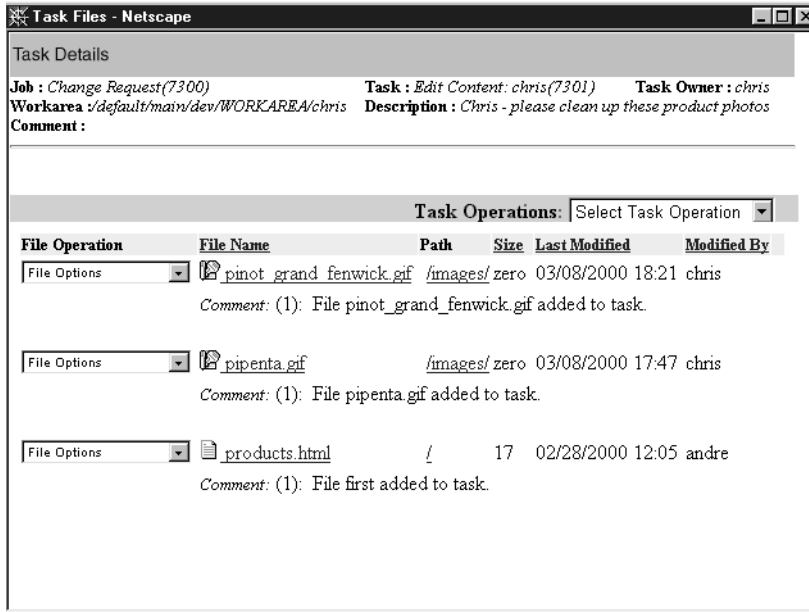
The Task Details window

In this window, you can perform file operations and task operations. File operations include editing task files, removing task files, and adding comments to task files. Task operations include adding and removing files from tasks, adding comments to tasks, completing tasks, and comparing task files to the staging area.

Adding and Removing Files from Tasks

Adding a New File to a Task

To add a new file to a task:

1. In your To Do list, select **Task Options** > **Edit Task**.

2. The Task Details window will appear. Select **Task Operation** > **Add New File**.

Adding new files to a task

3. A New File window will appear. Enter the name of the new file, and if necessary, navigate to the directory where you want to put the file. Select the type of template you want to use (if you do not want to use a template, make sure Plain File is selected), and select the specific template you want to use.[1] Click **OK**.

4. The file will be added to the task, and it will open in your editing application.

   This file will not be visible in the Task Details window until you select **Task Operation** > **Refresh**.

Adding Existing Files to a Task

To add existing files to a task:

1. In your To Do list, select **Task Options** > **Edit Task**.

2. The Task Details window will appear. Select **Task Operation** > **Add Existing File**.

3. The Add Files to Task window will appear. Use the left-hand pane to locate the file or files you want to add to the task. When you have located them, check the check boxes next to them and click **Add Files to List**. They will appear in the right-hand pane.

   If you add files to the list in error, click the check boxes next to the files you want to remove in the right-hand pane and click **Remove Files from List**.

---

1. The templates you select through the New File window are not TeamXpress Templating templates. For more information about New File templates, see page 180. For more information about TeamXpress Templating, consult *Using and Configuring TeamXpress Templating*.
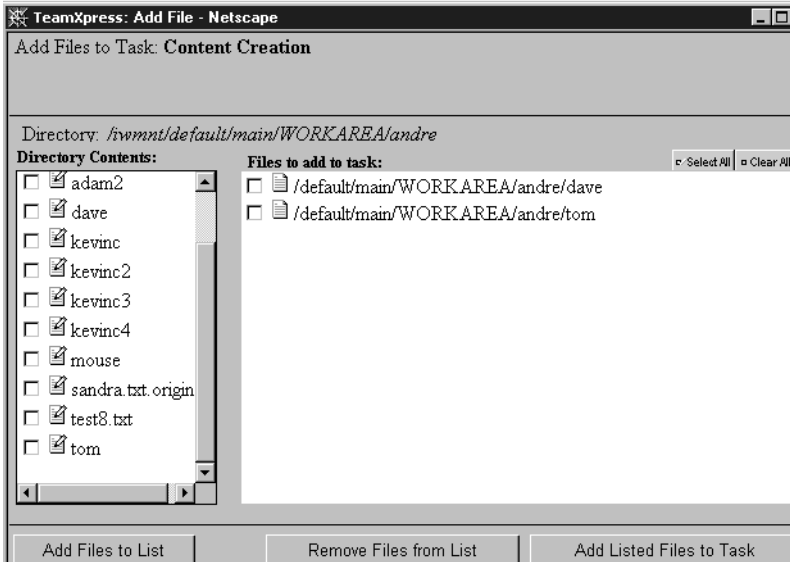
The Add Files to Task window

4. When the list in the right-hand pane contains all the files you want to add to the task, click **Add Listed Files to Task**. The files will be added to the task.

Removing Files from Tasks

To remove files from a task:

1. In your To Do list, select **Task Options** > **Edit Task**.

2. The Task Details window will appear. Locate the file you want to remove, and select **File Operation** > **Remove From Task**.

3. A confirmation box will appear; click **OK**.

4. The file will be removed from the task.

Adding Comments to Tasks

At any point in a task, you can add information in the form of comments. These comments may convey information to other users involved with the job (e.g. content contributors or approvers).

To add a comment to a task:

1. Go into your To Do list (click the **To Do** button in the Button Bar).

2. Locate the task you want to add the comment to. Select **Task Options** > **Add Task Comment**.

3. The Task Comments page will appear, containing a list of the task's existing comments at the bottom of the page, and a text box at the top of the page. Enter your comments in the text box and click **Add Task Comment**.
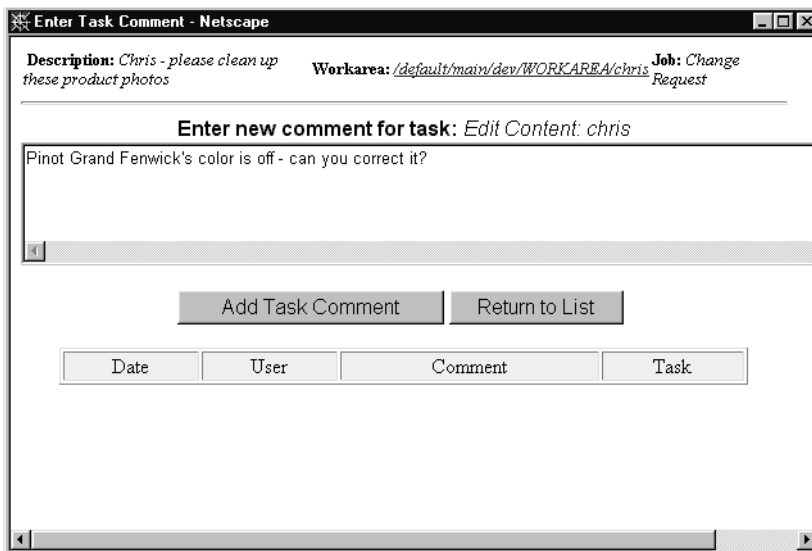
The Add Comments page

4. You will be returned to the Task Comments page, where you can enter another comment. To exit this page, click the **Return to List** button.

Editing Task Descriptions

To change the task description that appears in your To Do list:

1. Go to your To Do list (click the **To Do** button in the Button Bar).

2. Locate the task whose description you want to change. Select **Task Options** > **Change Description**.

3. A dialog box will appear. Type the new description into the space provided. Click **OK**.

   The new task description will appear in your To Do list.

Renaming Tasks

To rename a task that appears in your To Do list:

1. Go to your To Do list (click the **To Do** button in the Button Bar).

2. Locate the task whose name you want to change. Select **Task Options** > **Rename**.

3. A dialog box will appear. Type the new name into the space provided. Click **OK**.

   The new task name will appear in your To Do list.

Approving Tasks

Approval tasks require you to review the files, and then approve or reject them. To approve or reject the task, select the appropriate successor option (see "Completing Tasks" on page 120). Confirmation of your choice will appear in the TeamXpress window.

Completing Tasks

When you have completed a task, you need to select a transition to move the job along the workflow process.

To select a transition:

1. Go to the Task Details page (select **Task Options** > **Edit Task** from your To Do list).

2. Select the **Task Operation** menu. All possible task transitions will appear at the bottom of the menu. These transitions will vary from task to task (e.g. **Approve**, **Reject**, **Done**).

3. Select a transition.

The job will now move on to the next task. The task will appear in your To Do list with an updated status.

Some tasks may be retrieved after you have selected a transition (this is only possible if the next task has not been activated). If you want to take a task back, go to your To Do list and select **Task Options** > **Take back task** (if available). If this menu option is not available, then this task cannot be retrieved.

Taking Ownership of Tasks

You can only take ownership of group tasks, which are created without a specific owner. These tasks will say `<no user>` in the Owner column of the Job History window.

To take ownership of a task:

1. Go to your To Do list (click the **To Do** button in the Button Bar). Select **View** > **Unassigned Tasks**.

2. Locate the task you want to own. Select **Task Options** > **Take Ownership of Task**.

3. The task will now appear in your To Do list.

Resolving Task Conflicts

If, during the course of a workflow operation, you create conflicts[1] in a file or files, and a task tries to submit the conflicting files to the staging area, you will be taken to the Compare Tasks page to resolve the conflict (see page 122).

You can resolve the conflict by merging the two versions of the file (see page 124), by overwriting the version in the staging area (see below), or by overwriting your version with the one in the staging area.

---

1. See "Comparing Files" on page 79.

INTERWOVEN

To overwrite the version in the staging area with your own version, select the checkbox next to the file, click the **Overwrite** button, then click **Submit**.

To overwrite your version with the version in the staging area, select the checkbox next to the file, click the **Overwrite** button, then click the **Copy** button.

Comparing Tasks to the Staging Area

To compare the files in a task to the versions of those files contained in the staging area, go into the Task Details window and select **Task Operation** > **Compare to Staging**.
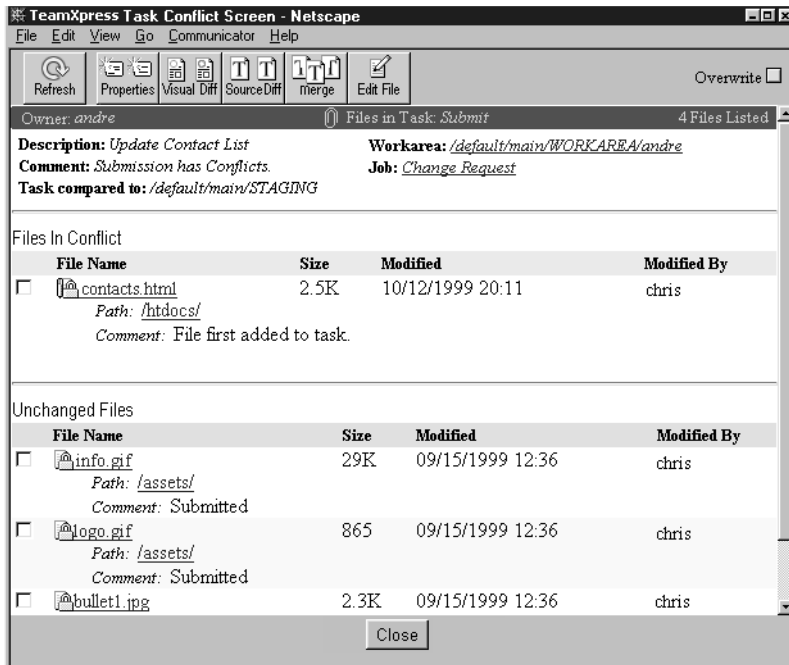
The Compare Tasks page

The Compare Tasks page allows you to see the differences between two versions of a set of files (in this case, the version of the files in the task, and the version of the files in the staging area). You can view the differences in the file properties and metadata, you can view the two versions of a page side by side, or you can view the source of two files side by side (available only for text files). You can also merge the two versions of the files (available only for text files).

Viewing File Properties of Two Versions of a File

To view the properties of two versions of a file, side by side:

1. Select the check box next to the file in the Compare Tasks page.

2. Click the **Properties** button in the Button Bar.

3. The Compare File Details window will appear, showing you information such as name, type, size, permissions, status, extended attributes, and metadata side by side.
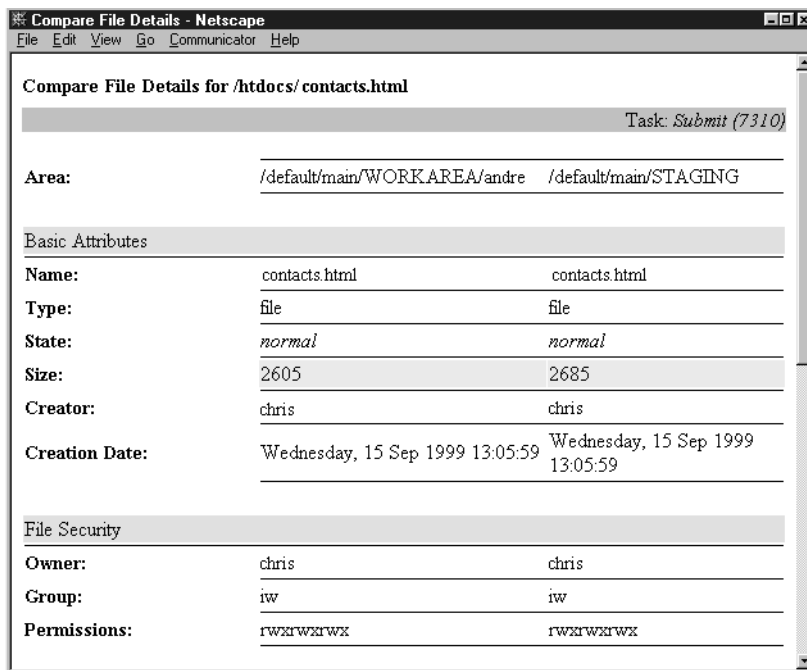
The Compare File Details page

Visually Comparing Files

To use the Visual Difference feature with the files in your task, select the check box next to a file in the Compare Tasks page, then click the **Visual Diff** button in the Button Bar. For more information about Visually Comparing Files, see page 85.

Visually Comparing Source Files

You can view the differences between the source of any two files.[1] To use the Source Difference feature with the files in your task, select the check box next to a file in the Compare Tasks page, then click the **Source Diff** button in the Button Bar. For more information about Source Differencing, see page 86.

Merging Files

If you have been brought to the Compare Tasks page because you need to resolve a conflict in a task, and you want to merge the two files, click the check box next to the file, then click the **Merge** button in the Button Bar.[2] For more information about merging files, see page 87.

1, 2. Requires a browser that will support Merge. See "Choosing a Browser" on page 16.

Managing Jobs

Viewing Jobs

To view all the jobs that you have created, select **View** > **My Jobs**. The TeamXpress window will display all the jobs you own, with information about the tasks contained in each job.
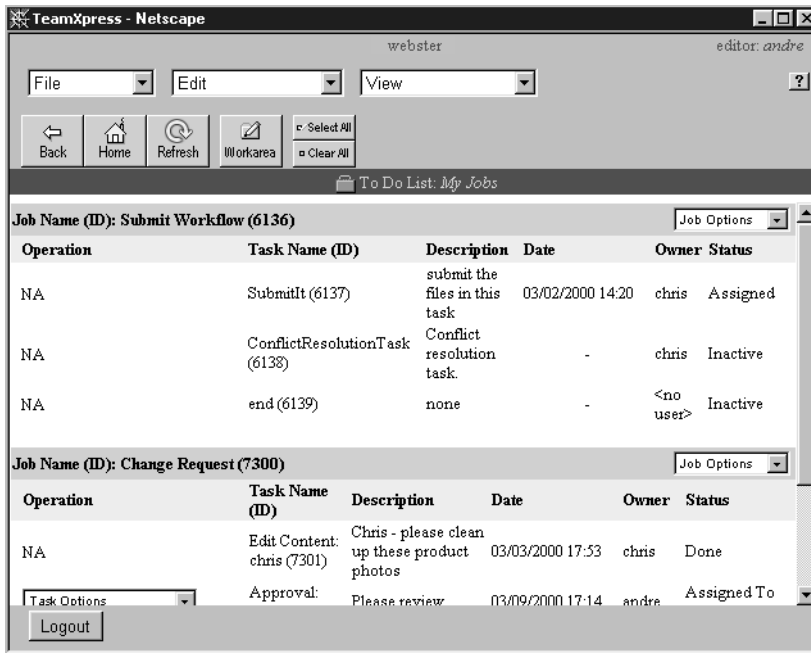
The Jobs window

A general outline of future tasks will be shown. However, this outline is subject to change, as some workflow models permit different paths to be taken through a job.

You can also view all jobs currently active in the system; to do this, select **View** > **All Jobs**.

Creating Jobs

To create a new job:

1. Select **File** > **New Job**. A new window will appear, asking you to select the workflow template you want to base the job on.

   The workflow templates that appear in this window are the templates that have been configured for your system. They may therefore differ from the example shown.
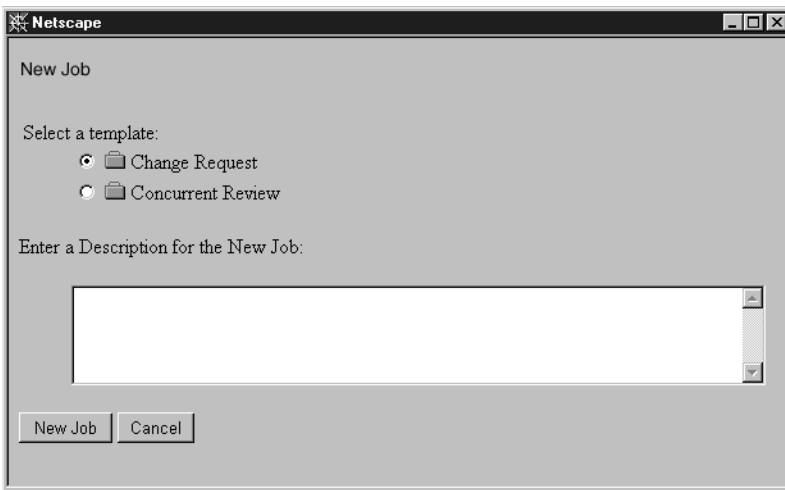
The New Job window

2. Select the radio button next to the workflow template you want to use, and enter descriptive comments in the text boxes. Click **New Job**.

3. A Job Template window will appear (this window will look different for different workflow templates). Enter the parameters of the new job in this window. The required parameters may differ for each workflow template. Click **Create Job**.

   If you have not entered data in required fields, or if you have entered invalid data, the fields that require your attention will be highlighted. Correct the data and click **Create Job** again.

Viewing Job Details

To view the tasks contained in a job you own, select **View** > **My Jobs**. All the previous and current tasks will appear, with their status indicated. Note that this outline is subject to change, as some workflow models permit different paths to be taken through a job.
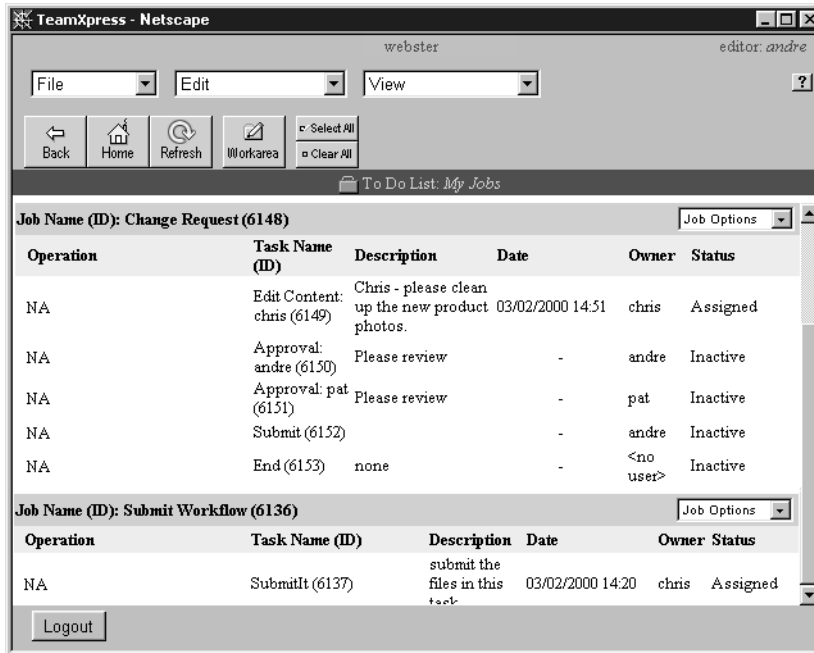
A "My Jobs" view

You can get more information about a job by selecting **Job Options** > **Job Details**.

Job Details window

The Job Details window shows the job owner, name, description, and past tasks. To view information about a particular task, click its name in this window. The Task Details window will appear (see page 115).

Chapter 6

Administering TeamXpress

An Administrator can perform all the functions of an Author or an Editor. In addition, an Administrator can create and delete new branches, sub-branches, and workareas. An Administrator also determines the type of locking used on a branch, can compress and uncompress old editions, and can view custom reports of user activities. In TeamXpress, you cannot create workareas off of the main branch. Additionally, depending on the licensing agreement for your product, you may not be able to add branches or sub-branches.

Using the Tool Bar

The Administrator's Tool Bar contains all the functions that an Editor has access to, in addition to some more advanced branch management functions. The Tool Bar consists of a Button Bar, containing the most frequently used commands, and a Menu Bar, which displays drop-down menus containing all the commands. Various commands are displayed at different times according to when you can use them.

The Administrator's Tool Bar

The Menu Bar contains three drop-down menus: **File**, **Edit**, and **View**. Each menu is displayed only when you can use at least one of the commands that it contains. Individual commands within the menus are displayed only when you can use them.

Creating Branches

When you create a branch, you can choose to base it on any edition of another branch. Your current software version and license agreement may limit the total number of branches you are allowed to create.

To create a branch:

1. Select **File** > **New Branch**.

2. You will be asked what edition you want to base the new branch on. Click the name of the edition you want to use as a starting point.

3. A Create Branch window will appear.

4. Enter the name of the branch in the Name box.

5. Your username will appear in the Owner box. If you want to assign the branch to someone else, enter the owner's name (including domain if using UNIX) in this box (e.g. `WEBSTER\andre`).

6. If you want this branch to have multiple Administrators, enter the name of the group who will be able to administer this branch in the Group for Sharing box.

7. Use the pull-down menu to select the type of locking you want to be used on this branch (see page 96 for an explanation of the different types of locking).

8. Add any comments in the Comment box.

9. Click **OK**.

Your newly created branch will contain no workareas, a staging area, and an edition called INITIAL, which will be a copy of the edition you used as a starting point.
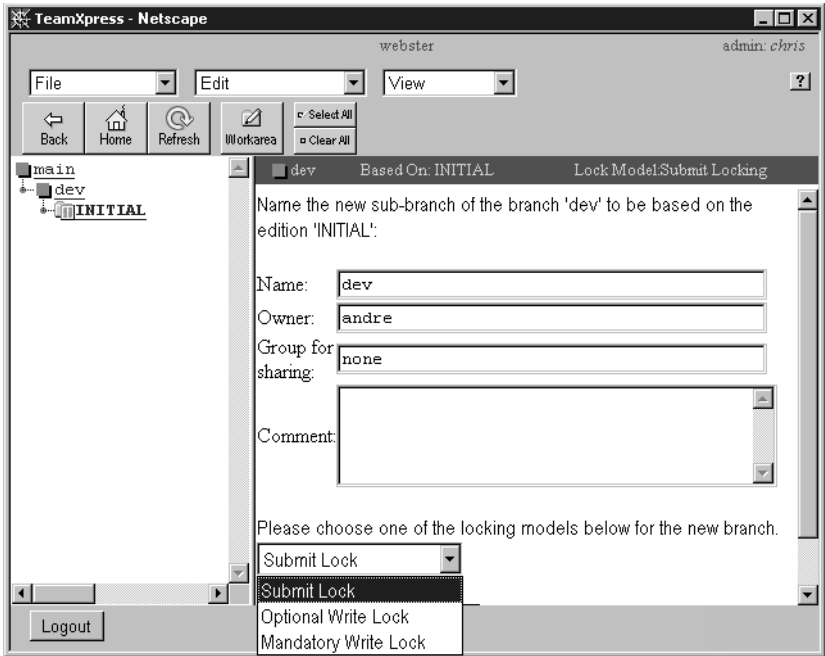
Create Branch window

Creating Workareas

Based on the version of software you have licensed, there will be limitations on the number of workareas you can create. Additionally, you cannot create workareas under the main branch.

To create a workarea:

1. Select **File** > **New Workarea**.

2. If there are multiple editions on the branch, TeamXpress will ask you what edition you want to base the new workarea on. Click the name of the edition you want to use as a starting point.

3. The Create Workarea window will appear. Enter the name you want to give the workarea in the Name box, and the username of the workarea's owner (including domain if using UNIX) in the Owner box (e.g. WEBSTER\andre).

4. If you want a group to be able to share this workarea, enter the name of the group in the Group for Sharing box. If you want this workarea to be private, so that only the owner can modify files in it, type none in the Group for Sharing box. For a Windows NT/2000 server, if you want all users to have access to this workarea, type everyone in the Group for Sharing box.If you want all users to have access to this workarea, type everyone in the Group for Sharing box.

5. Add any comments in the Comments box.

6. Click **OK**.

If you want this workarea to have the most recent content, you will need to use Get Latest on the entire workarea, because changes may have been made to the staging area since the edition you selected in Step 2 was published. If you want to work on the older version of the Web site content, do not use Get Latest.
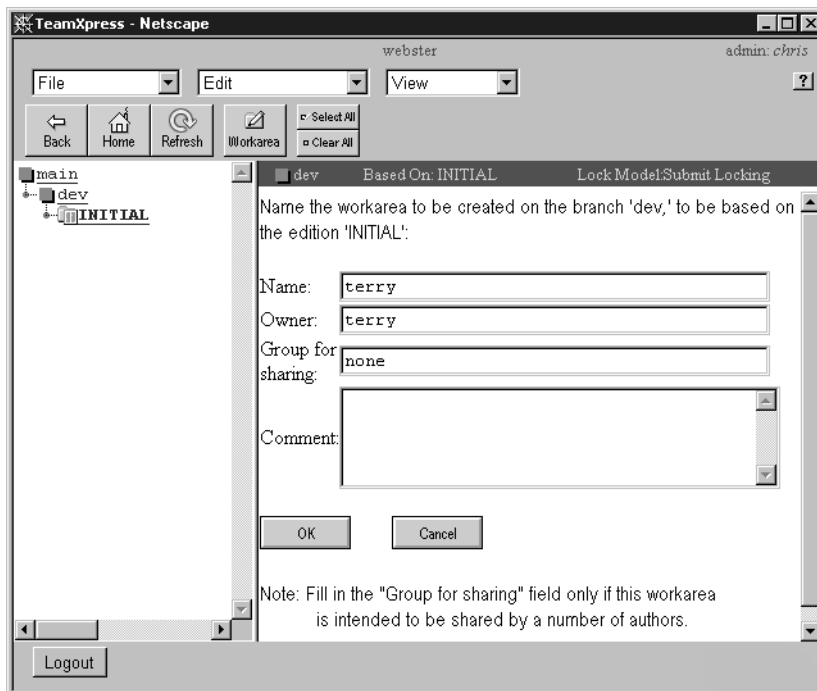
Create Workarea window

Deleting Workareas, Branches, and Editions

To delete a workarea, branch, or edition:

1. In the branch view, click the checkbox next to the item you want to delete.

2. Select **File** > **Delete**.

3. A confirmation window will appear. Click **OK**.

The workarea, branch, or edition will be deleted together with all its contents. Deleting a branch will delete all editions, workareas, and subordinate branches contained in that branch. In addition, deleting a branch or edition will delete all versions of a file that are contained within that branch or edition.

When you delete an edition, all Submit Log entries will be transferred to the next most recent edition. If the edition you have deleted is the newest one, the Submit Log entries will be transferred to the staging area.

Compressing and Uncompressing Editions

TeamXpress allows you to automatically compress all editions except the current one in order to conserve disk space. This behavior can be specified at the time of installation.

To compress an edition or editions:

1. Click the checkboxes next to the items you want to compress.

2. Select **Edit** > **Compress**.

The selected editions will be compressed. Compressed editions will appear in the Work Window with a (Compressed Edition) icon. Older editions are automatically compressed when newer editions are created.

To uncompress an edition or editions:

1. Click the checkboxes next to the items you want to uncompress.

2. Select **Edit** > **Uncompress**.

The selected editions will be uncompressed. Uncompressed editions will appear in the Work Window with an (Uncompressed Edition) icon.

Viewing Reports

TeamXpress's Global Report Center lets you view reports of most common user activities in any TeamXpress area or branch. You can select from three quick reports, or you can generate a custom report.

Quick Reports

The three quick reports show lists of all files submitted, deleted, or created on the entire TeamXpress server for today's date.

To generate a report of all files submitted, deleted, or added today:

1. Select **View** > **Reports**.

2. The Event Reporting window will appear. Select one of: **Today's Submissions**, **Today's Deletions**, or **Today's Additions** from the **Quick Reports** pull-down menu.

3. Click the **Go!** button.

4. Your report will appear in the Event Reporting window.

Custom Reports

Custom reports allow you to specify the type of event to report on, the area affected, the users involved, and the timespan for the events covered by the report, and the order in which you want this data sorted. You can select from two quick reports, or you can generate a custom report.
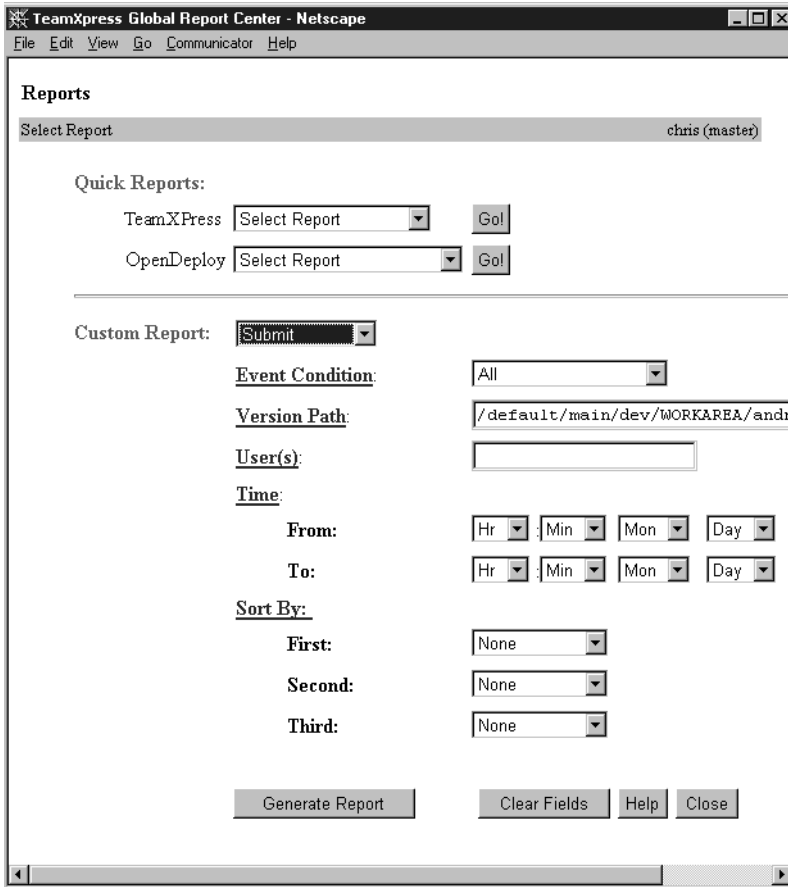
To generate a custom report:

1. In the **Custom Report** section of the Event Reporting window, select the type of report you want (**Submit** or **General**).

2. From the **Event Condition** pull-down menu, select the event you want to report on. Different events appear according to which type of custom report you have selected:

Submit	General
Add	Create Branch
ForceAdd	Delete Branch
Modify	Create Workarea
ForceModify	Delete Workarea
Delete	Compress Edition
ForceDelete	Uncompress Edition
All	Publish Staging Area
	Reset Config
	All

3. In the **Version Path** box, type the vpath (version path) of the file, directory, or TeamXpress area you want to be included in the report. If you do not specify a vpath, it will default to your current location within TeamXpress.

4. In the **User(s)** box, type the usernames of the users whose activities you want the report to cover. Separate usernames by commas, e.g.:

    ```
    andre,chris,pat
    ```

    If you do not specify a username, it will default to all users.

5. In the **Time** section, use the drop-down menus to select the start and end times for the time period to be covered by the report. If you do not specify a time, it will default to the entire time since TeamXpress was installed.

6. Select the sort order for your results. You can sort by time, user, and version path.

7. Click **Generate Report**. Your report will appear in the Event Reporting window. You can re-sort your results by clicking on the underlined **Time**, **User**, or **Version Path** headings.

The Event Reporting window

Chapter 7

Using TeamXpress Templating

TeamXpress Templating provides a highly flexible way to publish XML through easy-to-use templates and then display that content based on one or more presentation formats. Because TeamXpress Templating separates content entry from presentation, you can reuse content after it is captured and stored. TeamXpress Templating also lets you present the same content in different ways by using the same content with different templates. This chapter tells you how to install and use TeamXpress Templating.

Installing TeamXpress Templating

The TeamXpress Templating client software must be installed on your computer before you can begin creating and editing data content records. Your computer is referred to as a TeamXpress Templating Client. The following sections describe how to install the TeamXpress Templating Client software on different computer platforms using either an Internet Explorer browser or a Netscape browser.

Installing on Windows Platforms Using Internet Explorer

To install TeamXpress Templating on a Windows Platform using Internet Explorer:

1. Log on to TeamXpress through Internet Explorer (see "Logging In to TeamXpress" on page 17).

2. Navigate to your workarea.

3. Select **File** > **New Data Record**.

   A message displays telling you that TeamXpress Templating is not installed on your machine.

4. Click **Install** to start the software installation.

   The install program displays with a button labeled **Start Installer for Windows 95, 98, NT**.

5. Verify that the **Include VM in download** checkbox is checked.

6. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.

7. Click **Done** when the installation finishes. You may minimize the TeamXpress Templating window.

8. Close the browser window containing the installation program.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in "Entering Data" on page 152

Installing on Windows Platforms using Netscape

To install TeamXpress Templating on Windows platforms using Netscape:

1. Log on to TeamXpress through Netscape (see "Logging In to TeamXpress" on page 17).

2. Navigate to your workarea.

3. Select **File** > **New Data Record**.

   A message displays telling you that TeamXpress Templating is not installed on your machine.

4. Click **Install** to start the software installation.

   One or more Java digital security screens display. These screens indicate that a Java application wants to download and execute the install program on your computer.

5. Click **Grant** on each screen to continue.

   The install program displays with a button labeled **Start Installer for Windows 95, 98, NT**. Verify that the **Include VM in download** checkbox is checked.

6. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.

7. Click **Done** when the installation finishes. You may minimize the TeamXpress Templating window.

8. Close the browser window containing the installation program.

Additional Java digital security screens may display. Again, click **Grant** to continue. You may see these screens whenever you restart TeamXpress Templating. If desired, you may turn on the checkbox to remember these permissions.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in "Entering Data" on page 152

Installing on Solaris Platforms using Internet Explorer

Note: Before attempting to install on Solaris version 2.6 or earlier, install the Solaris patches that allow you to run Java 1.2.

To install TeamXpress Templating on Solaris platforms using Internet Explorer:

1. Log on to TeamXpress through Internet Explorer (see "Logging In to TeamXpress" on page 17).

2. Navigate to your workarea. Select **File** > **New Data Record**.

   A message displays telling you that TeamXpress Templating is not installed on your machine.

3. Click **Install** to start the software installation.

   The install program displays with a button labeled **Start Installer for Solaris Sparc**.

4. Verify that the **Include VM in download** checkbox is checked.

5. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.

6. Click **Done** when installation finishes. You may minimize the TeamXpress Templating window.

7. Close the browser window containing the installation program.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in "Entering Data" on page 152

Installing on Solaris Platforms using Netscape

Note: Before attempting to install on Solaris version 2.6 or earlier, install the Solaris patches that allow you to run Java 1.2.

To install TeamXpress Templating on Solaris platforms using Netscape:

1. Log on to TeamXpress through Netscape (see "Logging In to TeamXpress" on page 17).

2. Navigate to your workarea. Select **File** > **New Data Record**.

   A message displays telling you that TeamXpress Templating is not installed on your machine.

3. Click **Install** to start the software installation.

   One or more Java digital security screens display. These screens indicate that a Java application wants to download and execute the install program on your computer.

4. Click **Grant** on each screen to continue.

   The install program displays with a button labeled **Start Installer for Solaris SPARC**.

5. Verify that the **Include VM in download** checkbox is checked.

6. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.

7. Click **Done** when installation finishes. You may minimize the TeamXpress Templating window.

8. Close the browser window containing the installation program.

Additional Java digital security screens may display. Again, click **Grant** to continue. You may see these screens whenever you restart TeamXpress Templating. If desired, you may turn on the checkbox to remember these permissions.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in "Entering Data" on page 152

Installing on Mac OS Platforms using Internet Explorer

Internet Explorer allows a choice of two Java virtual machines. Check this setting prior to logging onto TeamXpress and attempting to install the TeamXpress Templating Client application. Go to **Preferences** > **Web Browser** > **Java**. The **Java virtual machine** field will show either Apple MRJ or Microsoft Virtual Machine. If Apple MRJ is selected, the version must be MRJ 2.2 and above. No special setup is required; proceed with the install program.

If Microsoft Virtual Machine is selected, perform the following steps before installation:

- In the Java panel of the Internet Explorer Preferences, add an entry to the Class Path field that points to the directory `<TeamXpress Templating install folder>`/For Microsoft VM.
- Select **Web Browser** >**Security Zones Preference**.
    - Set **Zone** to **Trusted sites zone**.
    - Click **Add Sites** and add `http://<TeamXpress server address>`; click **OK**.
    - Select **Custom (for expert users)** and click **Settings**. Go to **Java** > **Java Permissions** and select **Unrestricted**. Click **OK** to close dialog boxes.

To install TeamXpress Templating on Mac OS platforms using Internet Explorer:

1. Log on to TeamXpress through Internet Explorer (see "Logging In to TeamXpress" on page 17).

2. Navigate to your workarea. Select **File** > **New Data Record**.

   A message displays telling you that TeamXpress Templating is not installed on your machine.

3. Click **Install** to start the software installation.

   The install program displays with a button labeled **Start Installer for Mac OS**.

4. Verify that the **Include VM in download** checkbox is checked.

5. Click the **Start Installer** button. Normally you should accept the defaults and click **Next** to continue through the installation program.

6. Click **Done** when installation finishes. You may minimize the TeamXpress Templating window.

7. Close the browser window containing the installation program.

When you complete the installation, the New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in "Entering Data" on page 152

Installing on Mac OS Platforms using Netscape

To install TeamXpress Templating on Mac OS platforms using Netscape:

1. Log on to TeamXpress through Netscape (see "Logging In to TeamXpress" on page 17).

2. Navigate to your workarea. Select **File** > **New Data Record**.

    A message displays telling you that TeamXpress Templating is not installed on your machine.

3. Click **Install** to start the software installation.

    One or more Java digital security screens display. These screens indicate that a Java application wants to download and execute the install program on your computer.

4. Click **Grant** on each screen to continue.

    The installation Web page displays with a button labeled **Download Installer for Mac OS**.

5. Verify that the **Include VM in download** checkbox is checked.

6. Click the **Download Installer** button.

7. Save the `TSTP.bin` file.

8. Double-click on `TSTP.bin` to decode.

9. Click the **TSTP** icon to install the file.

10. Close the browser window containing the installation program.

To actually start TeamXpress Templating, click on the TeamXpress **Templating Client** icon on your desktop. A TeamXpress Templating window displays; you may minimize it.

Select **File** > **New Data Record** from the TeamXpress GUI to begin entering data. The New Data Content Record dialog box displays and you are ready to select a data capture template and enter data as described in "Entering Data" on page 152

Additional Java digital security screens may display. Again, click **Grant** to continue. You may see these screens whenever you restart TeamXpress Templating. If desired, you may turn on the checkbox to remember these permissions.

Understanding Templating Concepts and Definitions

The following sections define key TeamXpress Templating concepts and terms. Italicized items are explained in detail in their own sections. See the diagram below for more information about how these items interact with each other.

TeamXpress Templating Model

TeamXpress Templating is based on two overall concepts: *data capture* and *data presentation.* The following diagram and sections provide a high-level overview of this architecture.
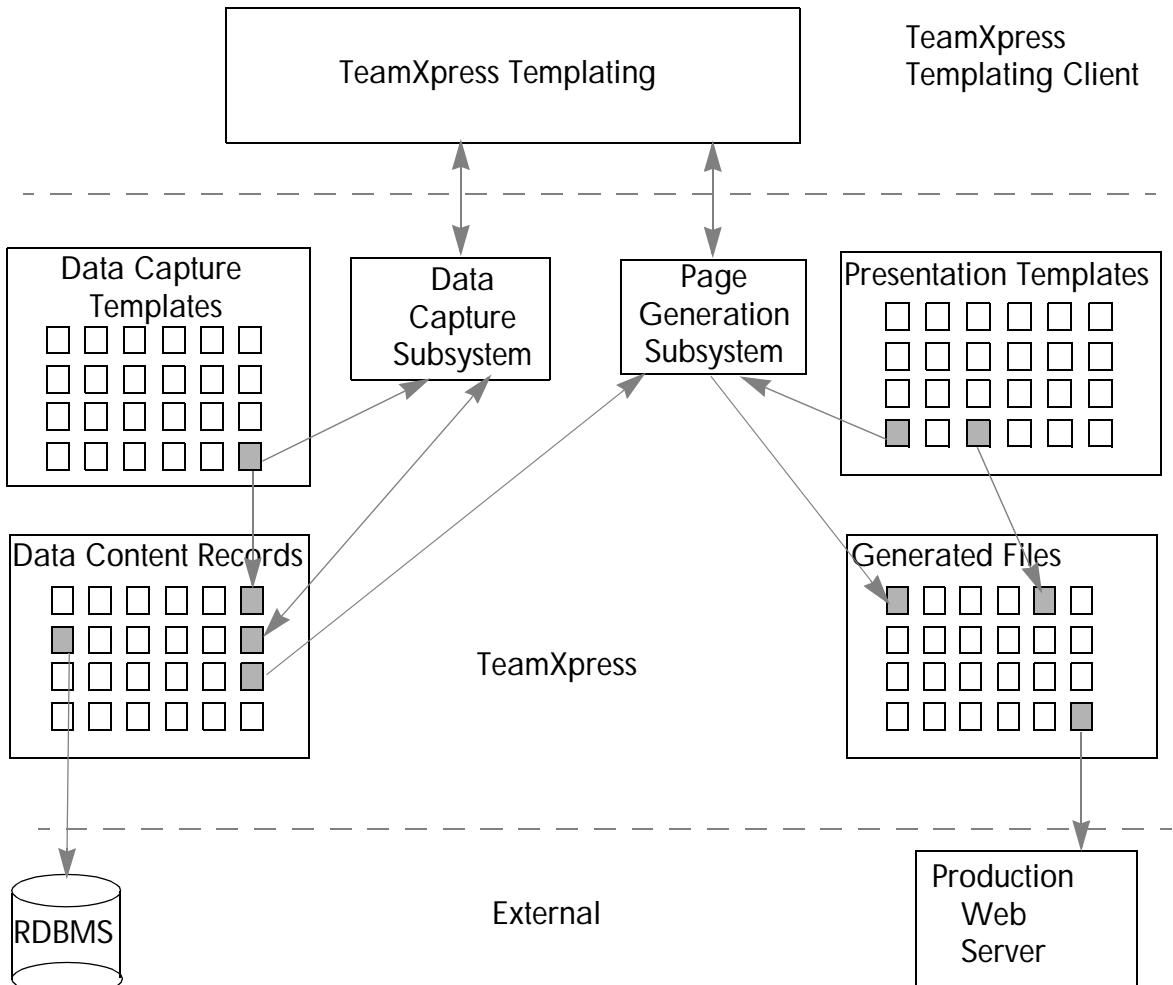
TeamXpress Templating Overview

Data Capture

Data capture occurs when you enter and save data. Data is stored as XML and used later to fill in *presentation templates* to generate multiple renderings of the content, including for the Web and wireless devices. You enter data through the TeamXpress Templating GUI by selecting and filling in a form based on a *data capture template* (this form is displayed in the data content record window). When the captured data is saved, it is stored as a *data content record* in the TeamXpress file system. After a data content record is created and stored, it can be displayed via a presentation template, or optionally deployed to a database via DataDeploy.

Data Presentation

After data is captured and stored as a data content record, you can combine the data content record with a presentation template. The result is a generated output file that displays the data content in a way defined by the presentation template. The generated output file can optionally be deployed to a production Web server via OpenDeploy.

Definitions

The following sections define key TeamXpress Templating terms.

Data Category and Type

TeamXpress Templating organizes data based on category and type. Data categories are at the top level of the data organization hierarchy. Each data category contains one or more data types, which represent more specific groupings of data. For example, the data category `beverages` could contain the data types `tea`, `coffee`, `milk`, etc.

Data Capture Template

A *data capture template* defines the structure of the form that is displayed in the data content record window, which you use to enter data. A data capture template is associated with a data category and type. The data category and type define what needs to be entered into the data capture template.The data that you enter is saved in the TeamXpress file system in the form of a data content record. See "Entering Data" on page 152 for information about how to enter data in a form based on a data capture template.

Presentation Template

A *presentation template* is an XML file that defines how captured data will appear when displayed. A presentation template is "populated" with an existing data content record plus any additional information that may be stored in a database. You can use any available data content record to populate any available presentation template that has been configured for the data content record's data capture template. You can also use a single data content record to populate more than one presentation template, resulting in a different look and feel for the same data content record, including versions for your internet and wireless Web sites. See "Previewing and Generating Output" on page 159 for information about how to combine a data content record with a presentation template to create an output file.

Data Content Record

A *data content record* contains the data entered via the TeamXpress Templating GUI for a specific category and type. You name a data content record when you save it. A data content record is an XML document whose elements can be mapped on an optional element-by-element basis to any relational database using DataDeploy Database Auto-Synchronization.

Understanding Data Storage Hierarchy

TeamXpress Templating uses a data storage hierarchy based on data *categories* and *types.* The directory structure supporting this hierarchy resides in the workarea for each TeamXpress Templating user. The directory structure is as follows. Items in boxes are directories; items not in boxes are files.

```
                    ┌─────────────┐
                    │  Workarea   │
                    └─────────────┘
                           │
                    ┌──────────────┐
                    │ templatedata │
                    └──────────────┘
                       ╱        ╲
          ┌──────────────────┐  ┌──────────────────┐
          │ data_category_1  │  │ data_category_2  │ . . .
          └──────────────────┘  └──────────────────┘
              ╱          ╲
  ┌──────────────┐  ┌──────────────┐
  │ data_type_1  │  │ data_type_2  │      . . .
  └──────────────┘  └──────────────┘
                     ╱          ╲
          ┌──────────┐      ┌──────────────┐
          │   data   │      │ presentation │
          └──────────┘      └──────────────┘
               │                   │
      content_record_1     pres_template_1.tpl
      content_record_2     pres_template_2.tpl

           . . .                 . . .
```
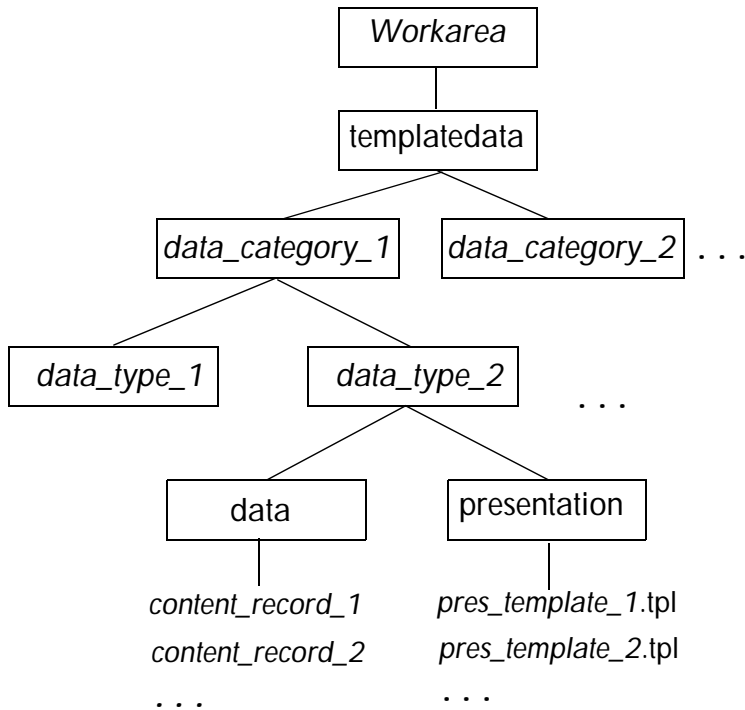
TeamXpress Templating Directory Structure

The templatedata directory is at the highest level in the hierarchy within the workarea.

Data categories are at the next level in the hierarchy and contain one or more data types. Data type directories each contain the subdirectories data and presentation as well as other files. The data content records you create are stored in the data directory or a subdirectory. The presentation templates you can use are stored in the presentation directory.

The following directory structure is created by default when TeamXpress Templating is installed. The examples in this manual are based on this directory structure. While your production directories will be different, this provides an example of how TeamXpress Templating directories are structured.

```
iw-home
└examples
  └ Templating
    ├─README
    ├─config
    │  ├─ README
    │  └─ templating.cfg.example
    ├─templatedata
    │  ├─ README
    │  ├─ internet                    ◄──────────  Data Category: internet
    │  │  ├─auction
    │  │  │  ├─ README
    │  │  │  ├─ data
    │  │  │  ├─ datacapture.cfg
    │  │  │  └─ presentation
    │  │  │     └─ auction.tpl
    │  │  ├─book
    │  │  │  └─ ...                    ◄──────────  Data Types:
    │  │  ├─careers                                 • auction
    │  │  │  └─ ...                                 • book
    │  │  ├─medical                                 • careers
    │  │  │  └─ ...                                 • medical
    │  │  ├─periodic                                • periodic
    │  │  │  └─ ...                                 • pr
    │  │  ├─pr                                      • yacht
    │  │  │  └─ ...
    │  ├─ intranet                    ◄──────────  Data Category: intranet
    │  │  ├─deptinfo     ◄
    │  │  │  └─ ...                                Data Types:
    │  │  └─weather      ◄                          • deptinfo
    │  │     └─ ...                                 • weather
    │  └─custom-dtd-examples
    │     └─ PressRelease  ◄
    └─workflow
      ├─ README
      ├─ author_submit_dcr-0.ipl                   Data Category:
      ├─ author_submit_dcr-3.ipl                   custom-dtd-examples
      └─ author_submit_dcr.wft                     Data Type:
                                                   PressRelease
```

Example TeamXpress Templating Directory Structure

Creating a New Data Content Record

The following diagram shows the actions that take place when you create a new data content record. Sections following the diagram explain each diagram step and component.
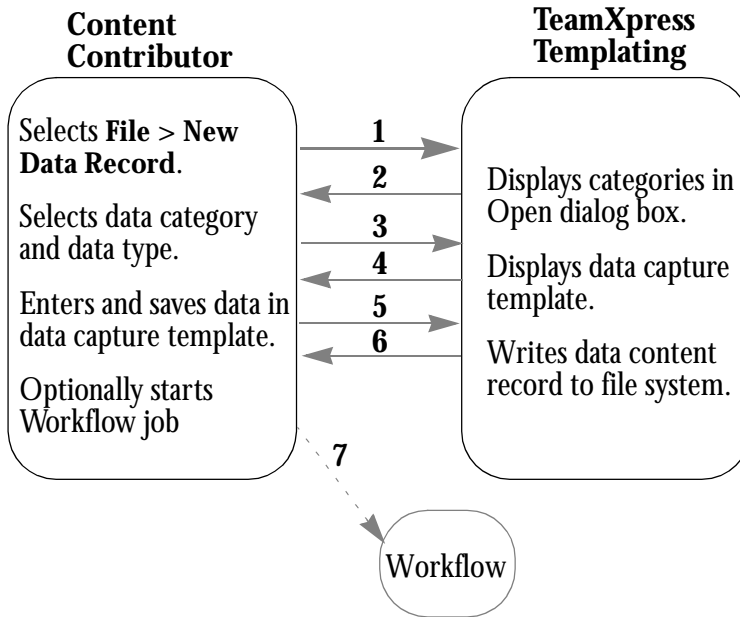
1. A content contributor clicks **File** > **New Data Record** in the TeamXpress GUI.

2. TeamXpress Templating displays the available list of data categories in the New Data Content Record dialog box.

3. The content contributor selects a data category and data type.

4. TeamXpress Templating displays the data capture template in the data capture form window.

5. The content contributor enters data in the data capture template and selects **File** > **Save**.

6. Using the data provided by the content contributor, TeamXpress Templating writes a data content record to the `data` subdirectory (or to a subdirectory of `data`) in the TeamXpress file system.

7. If creating the data content record is a task associated with a TeamXpress Workflow job, the user is prompted to start (or continue) the workflow when the newly created document is closed.

Generating a Web File

The following diagram shows the actions that take place when you generate a new Web file by populating a presentation template with a previously captured data content record. Sections following the diagram explain each diagram step and component.
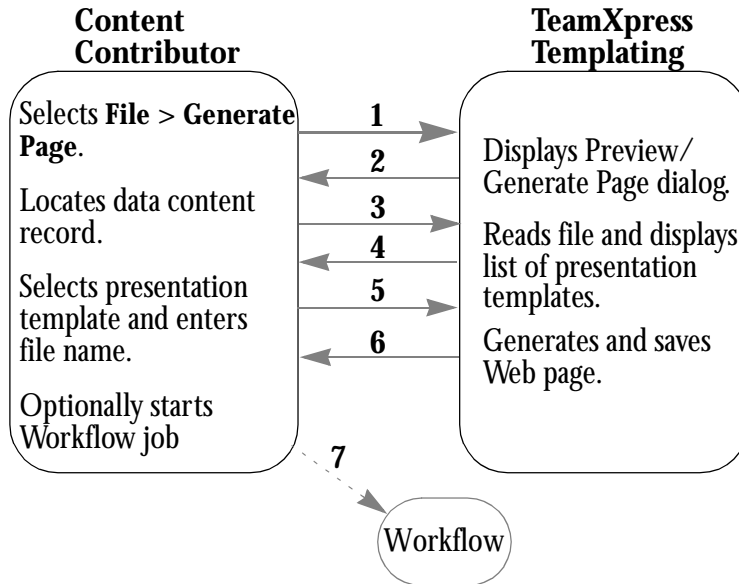
1. A content contributor clicks **File** > **Generate Page** or **File** >**Preview/Generate Page With** in the TeamXpress Templating GUI.

2. The Preview/Generate Page dialog box displays.

3. The content contributor locates the data content record in the left pane.

4. TeamXpress Templating determines which presentation templates are associated with the selected data type and displays the list of the appropriate presentation templates in the right pane.

5. The content contributor selects a presentation template, clicks **Generate**, and provides a path and filename to save the generated page.

6. TeamXpress Templating generates the Web page by populating the chosen presentation template with data from the chosen data content record. The Web page is saved and displayed in a browser.

7. If creating the generated Web file is a task associated with a TeamXpress Workflow job, the user is prompted to start (or continue) the workflow once the Web file is generated.

Accessing TeamXpress Templating

1. Log into TeamXpress.

2. Click the **Workarea** button and navigate to your workarea using the Navigation Window (the left pane on your screen).

3. After navigating to your workarea, you may want to select **Edit** > **Set Home Page** to set TeamXpress to automatically go to this workarea every time you log in.

Entering Data

To create a new data content record:

1. In the TeamXpress GUI, select **File** > **New Data Record**.

2. A New Data Content Record dialog box appears. Select the category of data and the data type you want to enter; click **Select**.

   Note: The data types listed are the ones that are specified in the `templating.cfg` file and that exist as directories under the `templatedata` directory in your workarea.

New Data Content Record Dialog Box

3. The data capture form displays.

Tool bar: Save Open Cut Copy Paste Bold Italics Underline Hyperlink

Menu bar

Special format

Required fields

Compound elements
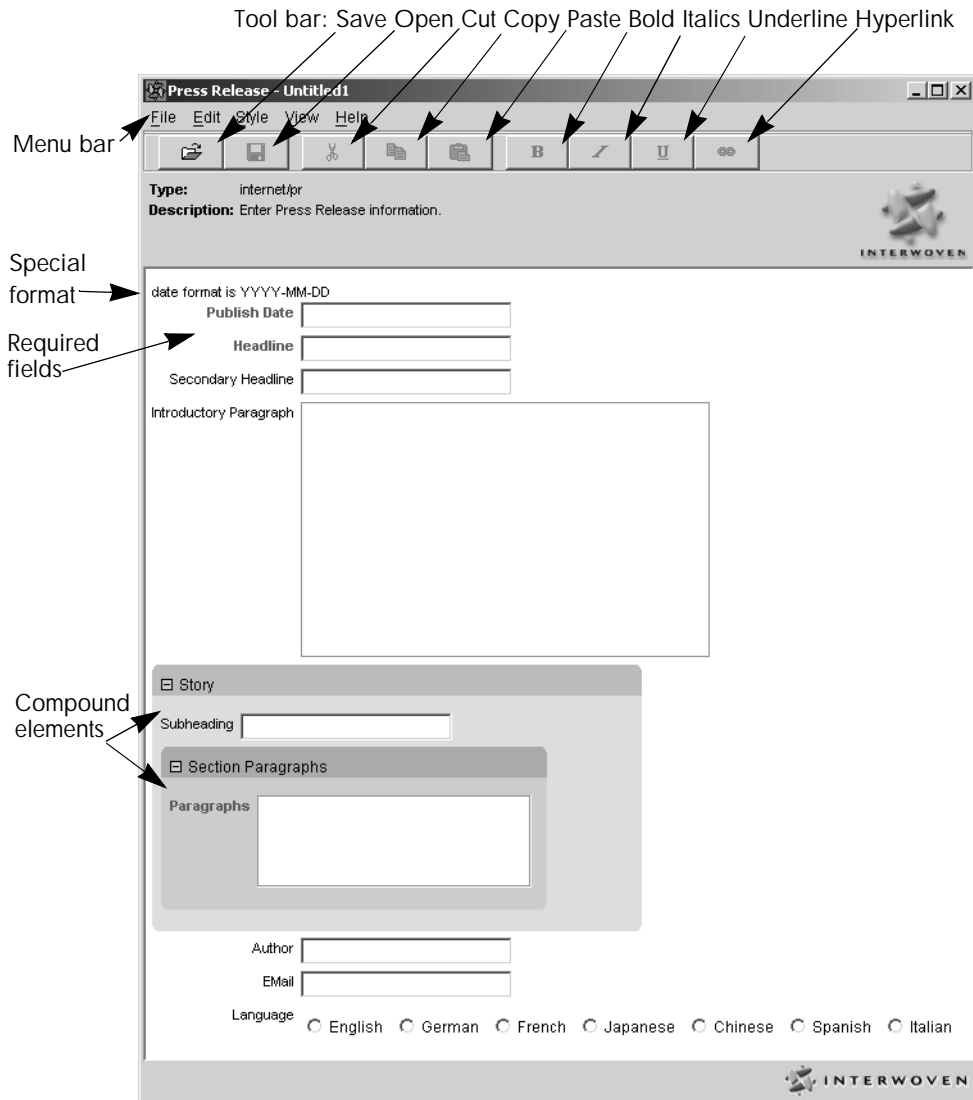
The Data Capture Form Window with the Press Release

You may use the **Cut**, **Copy**, and **Paste** commands in the **Edit** menu or on the tool bar to cut or copy information to the clipboard. You can paste it in another field or into another application. You may also copy information from another source and paste it into a data content record. Many of the menu items have keyboard shortcuts; press the **Alt** key, then the underlined letters. For example, **Alt+F+O** is equivalent to **File** > **Open** and displays the Open File dialog box.

The fields that display in red are required fields. If a field, such as a date, requires a specific format, that format may be shown above the field (for example, the date format shown above the **Publish Date** field). If you enter invalid data in a field with a specific format, the entry turns red and a tool tip also displays to indicate the error. You cannot save a data content record until all required fields contain valid data.

Some fields have an expand/collapse button in the upper left corner. These fields can be expanded to show the entire contents or collapsed to show only the field label. These areas are referred to as compound elements. The fields within a compound element can be duplicated or deleted. Fields can also be reordered by dragging (see page 156).

Some fields may have a **Browse** button next to them. Use this button to locate a file. Click the **Browse** button; the Select File dialog box displays. The directory that displays was set up in the `datacapture.cfg` file that defines the data capture form. Navigate to the file you want to use. If the selected file is a `.gif` or `.jpg` file, a thumbnail of the file displays in the Select File dialog box. The path to the file displays in the field in the data capture form.

4. When you finish entering data, save the form by selecting **File** > **Save** or **File** > **Save As** (refer to page 158).

5. To preview your data with a presentation template or to generate an output file, select **File** > **Generate/Preview With** (refer to page 159 for details).

Formatting Text

Text areas may have been set up by the template designer so you can mark text to be bold, italicized, or underlined. When a text area accepts these text types, the icons in the tool bar are active.

Highlight the text and click on the appropriate button from the tool bar to format the text. You can also select these items from the **Style** menu.
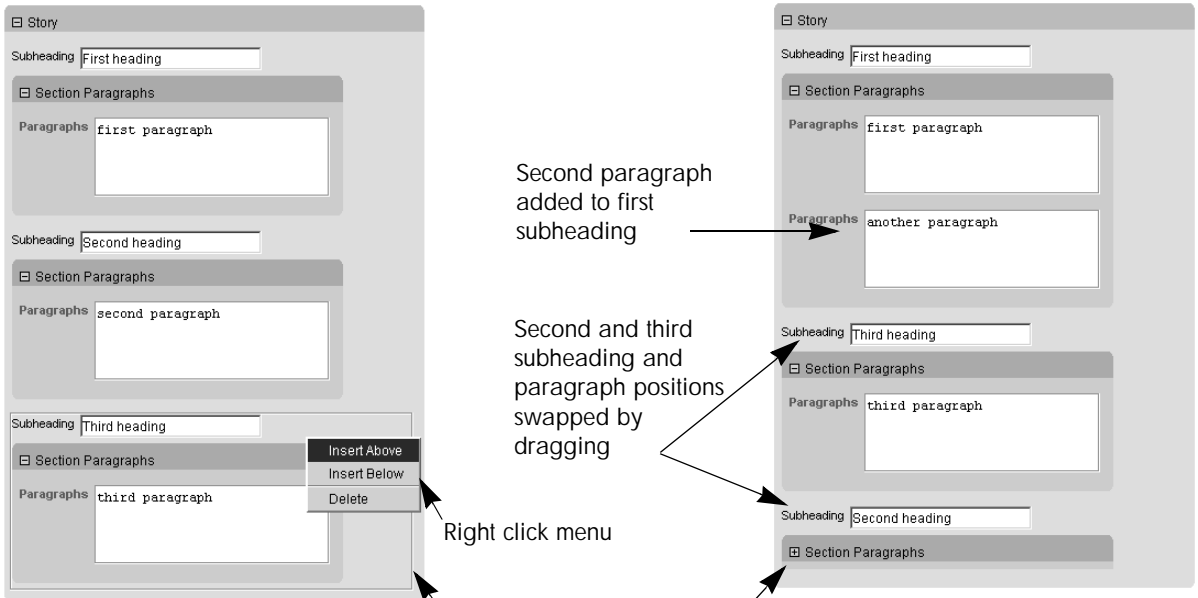
You can also specify a hypertext link. Enter the text you want to use as the link. Highlight the text and click the Link button (or select **Style** > **Link**). A dialog box displays so you can enter the URL to link to. When you click **OK**, the text you highlighted displays as a hypertext link.
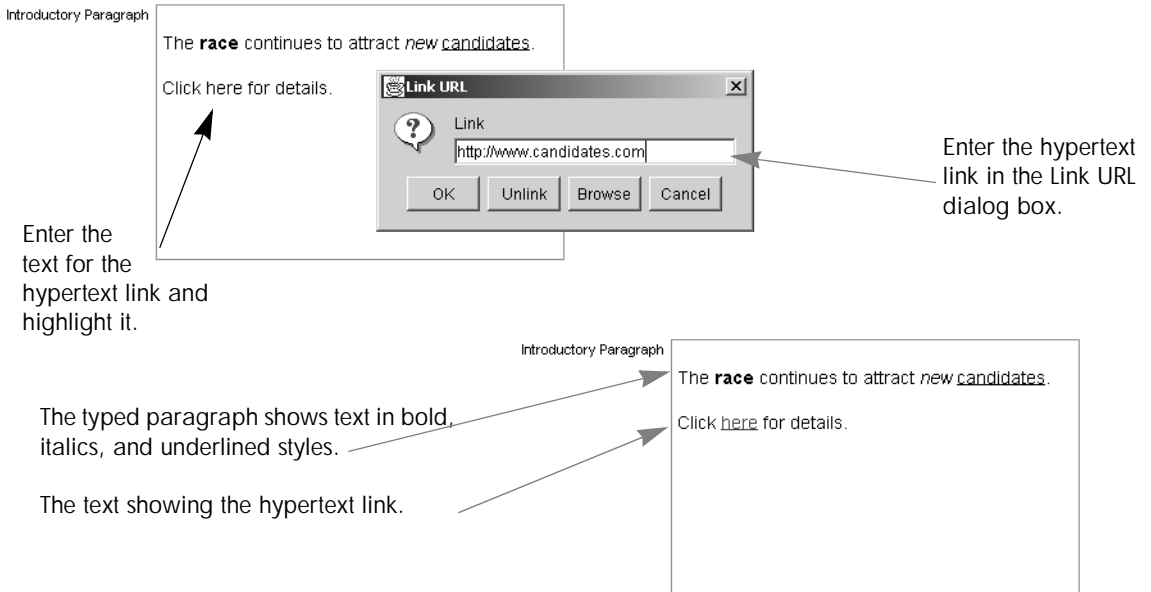
Example Showing Text Area Styles

Working within Compound Elements

A compound element contains fields that can be duplicated within the data capture form. For example, if you are preparing a press release, you would probably need to duplicate the **Subheading** and **Paragraph** fields. You can add additional compound elements or fields within the compound element. You can also reorder the fields within a compound element. The **Edit** menu is used within compound elements to insert and delete fields. A right-click menu from within compound elements also accesses these commands.

Second paragraph added to first subheading

Second and third subheading and paragraph positions swapped by dragging

Right click menu

Story compound element with two subheadings and paragraphs added to original subheading and paragraph

Outline around selected compound element

Paragraphs under Second subheading collapsed by clicking on the −

Compound Element in Data Capture Form

To add additional compound elements:

1. Click to select the compound element to be duplicated. Because there may be compound elements within compound elements, be sure you have the correct one selected. You may find it helpful to click near the field name.

2. Select **Edit** > **Insert Above** to add a compound element above the highlighted one. Select **Edit** > **Insert Below** to add a compound element below the highlighted one. You can alternately select **Insert Above** or **Insert Below** from the menu displayed by clicking the right mouse button within a compound element.

The number of compound elements that can be added and/or deleted is specified in the data capture template. If you cannot insert or delete any more items, the menu items will be grayed out.

You can reorder fields within a compound element. To reorder compound elements:

1. Click to select the compound element to be moved.

2. Drag the selected compound element to the new position.

To delete compound elements:

1. Click to select the compound element to be deleted.

2. Select **Edit** > **Delete** (or select **Delete** from the menu displayed by clicking the right mouse button) to remove the compound element.

Saving Data Content Records

If you select **File** > **Save As** or if you select **File** > **Save** for a data content record that has not yet been saved, the Save File dialog box displays. Enter a file name and click **Save**. Once a data content record is saved, its name displays in the banner at the top of the data capture form.
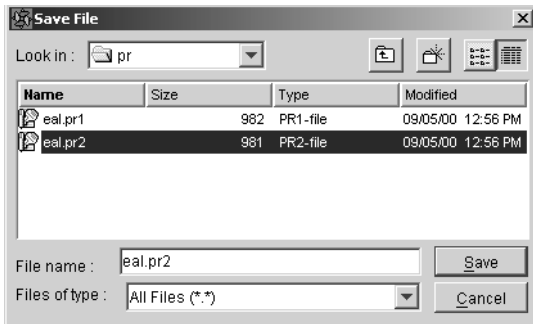
Save File Dialog Box

The Save File dialog box and, similarly, the Open File dialog box provide several features.

- You can change information in the dialog box using the icons in the upper right corner of the dialog box to:
  - Move up one level in the directory structure.
  - Create a new directory.
  - Display only the names of files.
  - Display the name, size, type, and date modified for files.
- You can rename a file by highlighting a file and typing in a new name in the Name column.
- You can delete an existing file by highlighting the name and pressing the **Delete** key.

You may delete data content records in the **Open File**, **Save File**, and **Generate/Preview File** dialog boxes. Select the data content record, and press the **Delete** key (on Sun and PC keyboards). If you have a standard MacIntosh keyboard, this feature is not available.

Previewing and Generating Output

You can preview how your data will look in a browser with a particular template. If you have not saved the data record, you will be prompted to do so before the file is previewed or generated.

To preview the data content record:

1. From the data capture form, select **File** > **Generate/Preview Page With**; the Generate/Preview File dialog box displays.

2. In the left pane of the Generate/Preview File dialog box, highlight the data content record to be used to generate the Web page.

3. The right pane of the Generate/Preview dialog box shows the presentation templates (`file.tpl`) that may be used with the selected data content record; highlight the presentation template you want to use.

4. To display the output in a browser window, click **Preview**. Your data, combined with the selected template, displays. When you finish previewing, close the browser window.

To generate an output file:

1. Repeat steps 1 through 3, above.

2. To generate and save the output file, click **Generate**. The Select Output File dialog box displays; enter the name of the generated file. The page appears in a file browser window (if it is not already displayed), and the generated file is saved in the specified location in your workarea.
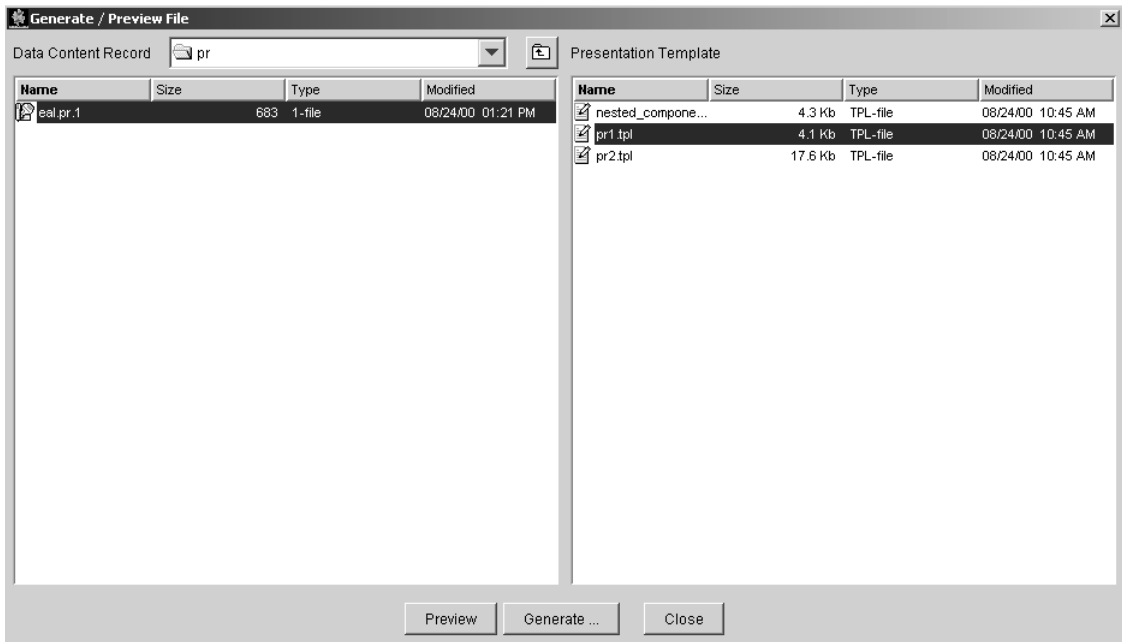
Generate/Preview File Dialog Box

Generating Web Pages

If you regenerate output files that already have a presentation template associated with them, you are not prompted to select a presentation template.

To generate a Web page:

1. From the data capture form, select **File** > **Generate Page**; the Select Output File dialog box displays; enter the name of the generated file.

2. The page appears in a browser window, and the generated file is saved in the specified location in your workarea.

If you select the **File** > **Generate Page** command and you have not selected a presentation template, the Generate/Preview dialog box displays so you can select the data content record and presentation template (refer to page 159).

To generate a file using a different presentation template, use the **File** > **Generate/Preview With** command.

Changing Templates

You can generate Web pages using any possible combination of data content records and presentation templates that are configured for their data type. If you want to change a template after generating an output file, generate a new output file with the presentation template you want to use and optionally delete the old output file.

Editing Data

You can access data content records for editing from either the TeamXpress Templating GUI or from the TeamXpress GUI.

To edit an existing data content record from the TeamXpress Templating GUI:

1. With a data capture record open, select **File** > **Open**.

2. In the Open File dialog box, navigate to the data content record you want to edit; click **Open**.

3. The data capture form appears, containing the existing data. Edit this data as described in "Entering Data" on page 152. Then save and preview or generate the output.

You can have multiple data content records open for creation or editing.

Initiating Workflows

When workflows have been configured and the data content record is part of a workflow, you can initiate the workflow through TeamXpress Templating. When you save and close a data content record or generate an output file, you are asked whether you want to start a workflow. If you start a workflow, you are asked to select a workflow. Normally you would start a workflow when you had a task create a data content record or generate an output file.

Using Templating from the TeamXpress GUI

In addition to the **File** > **New Data Record** menu item that you use to begin create data content records, a number of other commands available from the TeamXpress GUI provide access to TeamXpress Templating data content records.

Viewing Data Content Records

To view an existing data content record from the TeamXpress GUI:

1. Navigate to the data content record you want to view.

2. Turn on the checkbox next to the name of the data content record you want to delete.

3. Click **View File**.

The data content record is opened in read-only mode and **File** > **Save** from the Templating GUI is disabled. **File** > **Save As** is enabled so you can save the data content record under a new name and then modify it to create a different record.

Editing Data Content Records

To edit an existing data content record from the TeamXpress GUI:

1. Select **Edit** > **Edit Data Record** or click the **Edit** button.

2. In the Open File dialog box, navigate to the data content record you want to edit; click **Open**.

3. The data capture form appears, containing the existing data.

Alternately, you can navigate through the directories in TeamXpress to the appropriate data content record in the `data` subdirectory. Select the checkbox next to the name of the data content record you want to edit. Select **Edit** > **Edit Data Record** or click the **Edit File** button and the selected data content record displays.

Deleting Data Content Records

To delete a data content record from the TeamXpress GUI:

1. Navigate to the data content record you want to delete.

2. Turn on the check box next to the name of the data content record.

3. Select **File** > **Delete** or press the **Delete** key on the keyboard.

4. A confirmation window appears. Click **OK**.

Generating Web Pages

When generating Web pages, first make sure that no items are selected in the TeamXpress GUI. To generate a Web page, from the TeamXpress GUI, select **File** > **Generate HTML**. The Generate/Preview File dialog box displays. Following the instructions provided in "Previewing and Generating Output" on page 159.

Regenerating Web Pages

If the data content record or the presentation template used for a Web page has changed, you need to regenerate the Web page.

1. From the TeamXpress GUI, select the output file or files that you want to regenerate by clicking on the checkbox next to the filename, and select **File** > **Regenerate HTML**.

   The selected files that were generated by TeamXpress Templating are regenerated. Regenerating a file does not instantiate a new workflow job or add the file to an existing workflow task.

2. A success message appears. Click **OK**.

Note: The **Refresh** button in the TeamXpress GUI and the **Refresh** button in the Smart Context Editing tab have different functions than **File** > **Regenerate HTML**; they simply refresh or redisplay the current window.

Searching Data Records

Data Record Search is available from the TeamXpress GUI when you have TeamXpress Templating and DataDeploy Database Auto Synchronization installed and configured to submit data content records to a database.

You can search for data content records based on the data entered for them. For example, the form for creating a new press release data content record contains such entry fields as Publish Date, Headline, Secondary Headline, Author, Email, and Language. If you choose to search among the press release data types for a particular data record, your search form will display these fields.

A Data Record search must be conducted within a workarea. You can initiate the search from anywhere within the workarea. The search is performed on data content records in the entire area and all subareas from which it was executed. For example, if you execute a search from `\default\main\www\WORKAREA\w1\templatedata\internet`, all files in `internet` and its subdirectories are searched. If you execute a search from `\default\main\www\WORKAREA\w1\templatedata\internet\pr`, all files in `pr` and its subdirectories are searched.

To search Data Content Records through the TeamXpress GUI:

1. Navigate to the workarea where you want to search. Note that the place within the workarea is irrelevant; the search continues through the category you choose regardless of where in the workarea you initiate the search.

2. Select **View** > **Search Data Records**.

3. In the Data Record Search window, select the data category and type.

4. Click **Continue**.

   The Data Record Search window appears in a new browser window. Notice that category name, data type, and workarea path name are displayed under the form's title.
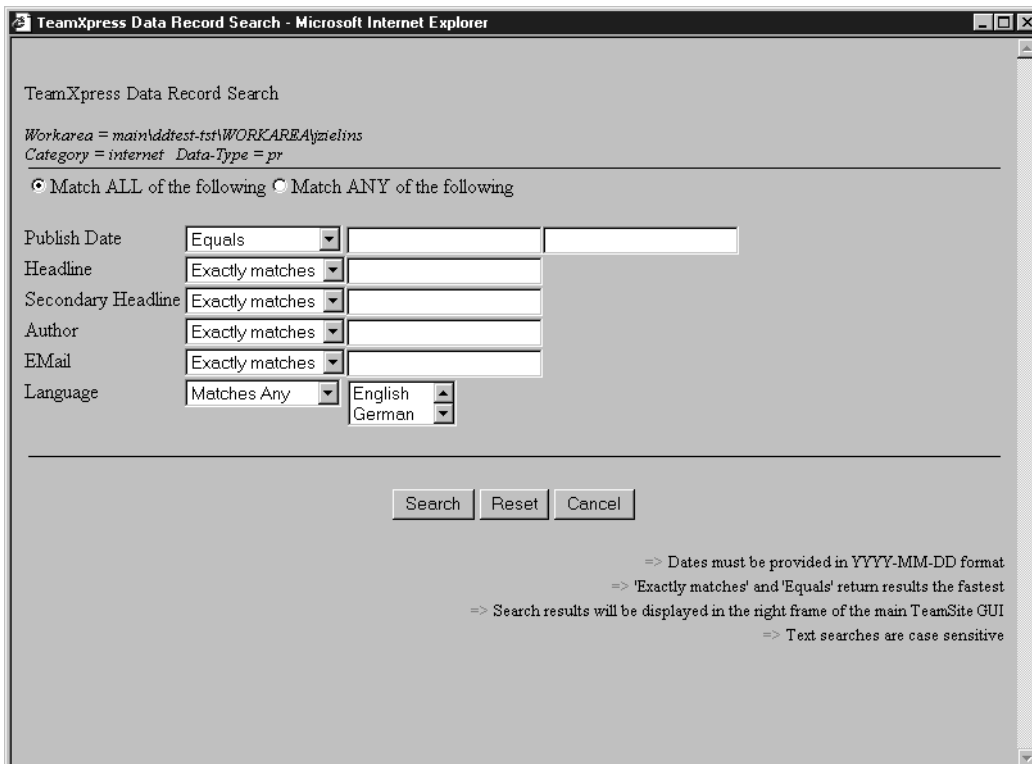
TeamXpress Data Record Search Window

5. Decide whether you want your search to match all of the items you set or any of the items.

6. Set the criteria for your search. You may set just one or several search criteria. Focus your search by selecting operators from the drop-down menus (refer to "Search Criteria") and then providing or selecting values.

7. After you set your criteria, click **Search**.

The results display in the right frame of the main TeamXpress GUI. The results display in order by file name. Regardless of where you initiate your search, the relative path from the `templatedata` directory to the file is included in the file name. For example, a search that retrieves a file named `June_11` in the `pr` directory in the `internet` directory under the `templatedata` directory in a workarea displays the file as `/templatedata/internet/pr/data/June_11`.

Search Criteria

The following guidelines apply to data content record searches:

- The default is that records must match all of the criteria you specify. You may change the selection so that a record matches any of the specified criteria.
- Text fields are case-sensitive.
- Dates must be entered in YYYY-MM-DD format with dashes between year, month, and day.
- The pull-down for date fields allows you to select any of the following:
  - Equals
  - Does not equal
  - Between
  - Not between
  - Greater than
  - Greater or equal
  - Less than
  - Less or equal

When you use the **Between** or **Not Between** operators for a numerical range, such as a date, you must enter a starting value in the first field and an ending value in the second. When you use operators other than **Between**/**Not Between**, you need only enter a value in the first field.

- The pull-down for text fields such as titles, descriptions, sources, and keywords allows you to select from the following:
  – Exactly matches
  – Does not match
  – Begins with
  – Ends with
  – Contains
  – Does not contain
- The pull-down for fields with selected choices (such as radio buttons) allows you to select from the following:
  – Matches any
  – Matches all
  – Does not match

Appendix A

TeamXpress Icon Reference

TeamXpress Areas

Branch

Workarea

Staging Area

Edition

Files and Directories in TeamXpress

File

Directory

Deleted File or Directory

Modified File

Locked File (locked by you) (see page 97)

Modified Locked File

Locked File (not available to you) (see page 97)

Modified Locked File

Private File (see page 103)

Private Directory (see page 103)

Appendix B

Internationalization

This appendix contains the following information:

- An overview of TeamXpress multibyte character support.
- General recommendations and information regarding specifying the encoding of web assets and the browser behavior when interpreting encoding.
- Information regarding multibyte support for TeamXpress Templating, DataDeploy, and OpenDeploy.

Overview

End users can input data into TeamXpress in any of four languages.

TeamXpress GUI elements, such as buttons and drop down menus, retain English names but may look slightly different because all HTML pages of our browser-based GUI are now UTF-8 encoded, even for US English installations. Your client browsers may therefore choose different fonts to render UTF-8 HTML pages.

TeamXpress supports the following four languages:

- US English
- Japanese
- Traditional Chinese
- Simplified Chinese

Note that TeamXpress users can interact with the GUI using any one of the supported four languages, but the TeamXpress server *must* use an US English operating system. All TeamXpress configuration files (including workflow templates) must be ASCII. TeamXpress does not currently support non-ASCII characters in branch, area, directory, or file names.

About UTF-8

UTF-8 is the encoding for Unicode. Unicode is a system for exchanging, processing, and displaying diverse written languages. Unicode supports the principal written languages of the world as well as many classical languages.

Recommendations

It is strongly recommends that all pages specify their encoding. This can be done by using the charset parameter within the META tag:

```
<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">
```

Specify the encoding of your Web content so that browsers may display this content consistently without error. When passed content that is not specified, browsers rely on default settings to interpret content encoding; if the default does not match the passed content's encoding, the browser may display nonsense.

When Using Notepad and Wordpad

Notepad on Windows 2000 defaults to ANSI when a file is saved; Wordpad defaults to Rich Text Format (RTF). When using Notepad, select **File**> **Save As**, then select **UTF-8** in the **Encoding** drop down menu. When using Wordpad, select **File**> **Save As**,, then select **Unicode Text Document** in the **Save as type** drop down menu.

Wordpad on both the Traditional and Simplified Chinese versions of Windows NT 4.0 can neither save nor render text as UTF-8.

In Notepad, you can begin the first line of text with a š character. In Wordpad, do not begin the first line of text with š.

Behavior of Netscape Navigator

Once Netscape finds a UTF-8 page, it uses UTF-8 as its default encoding for pages that do not specify their encoding. This may cause the browser to display pages incorrectly if you browses pages that do not specify their encoding, or create pages without specifying the encoding.

Scenario 1

1. A Japanese user goes to a Japanese site which does not specify its encoding. Netscape defaults to 'Japanese (Auto-Detect).'

2. The Japanese user logs into TeamXpress (UTF-8 pages). Netscape switches to UTF-8.

3. The Japanese user opens a new window and returns to the Japanese site which does not specify its encoding. Now Netscape defaults to UTF-8.

4. This would not happen if the site specified the encoding of its Web pages.

Scenario 2

1. A Japanese user logs into TeamXpress (UTF-8 pages). Netscape switches to UTF-8.

2. The Japanese user's content in TeamXpress does not include the 'Content-type' META tag.

3. Upon entering SmartContext QA, Netscape tries to render the content as UTF-8, which is probably wrong. The solution to this problem is to always specify the encoding for all HTML content.

Summary

When trying to read Web pages without an explicit declaration of encoding, all browsers rely on default settings to "guess" the encoding of the page. The default setting is established differently in Internet Explorer than in Netscape Navigator. If the browser's default setting is different than that of the actual encoding of the page passed to the browser, the browser may render the page incorrectly. Therefore, your Web pages should always declare their encoding. Not only will this prevent Netscape from guessing incorrectly when you use TeamXpress, but it will also ensure that your Web site viewers' browsers will not have to guess which encoding they should use.

Multiple Languages, One Web Site

TeamXpress allows contributors to use any or all of the four supported languages in its GUI. However, users who want to see multi-language content must have browsers capable of doing this. For example:

1. In TeamXpress, a Japanese user enters some submit comments in Japanese.

2. If an American user wants to view the version history, then the American user's browser must be capable of correctly displaying Japanese characters.

Glossary

Administrator

The owner of a branch, responsible for the project being developed on it. An Administrator can perform all the functions that an Author or an Editor can, and can also create and delete new sub-branches and workareas on his branch. Administrators exercise control over workflow by giving workareas to editors and sub-branches to other administrators.

Advanced File Merging

TeamXpress can automatically merge two separately modified versions of a file, producing a new file containing the changes made by both users. Advanced File Merging is completely automatic if the edits were made to different parts of the file (non-conflicting edits).

Author

A primary Web content contributor with limited access to the TeamXpress system. Authors can access, create, and modify Web content through their Editors' workareas. An Editor can assign specific files to an Author, which will appear in the Author's To Do list.

Autoprivate

The Autoprivate feature helps minimize clutter on the development server. Autoprivate automatically identifies file types that should not be submitted to the staging area and marks them as Private. These files typically include Macintosh resource forks (.FRK), Microsoft temporary files (.TMP) and various backup files (.BAK).

branch

A path of development for a body of content developed and maintained by a team. Each branch contains one or more workareas, a staging area, and a published edition and may contain sub-branches and previous editions. Branches are depicted in TeamXpress with the ■ icon. Workareas cannot be created under the main branch.

comment

A note attached to a file, directory, workarea, branch, edition, job, or task. Comments can be attached to workareas, branches and editions when they are created. Comments can be attached to files and directories when they are assigned, returned, rejected, locked or submitted. Global comments can be set when these functions involve multiple files.

Compare

A function that displays a list of the differences between any two TeamXpress objects. Objects that can be compared include workareas, staging areas, or editions.

conflict

Occurs when multiple users make changes to the same file in multiple locations, e.g. when a file has been changed in two different workareas.

conflicting edits

Occur when multiple users make changes to the same parts of the same file, producing two versions of the file that cannot be automatically merged. Conflicting edits require users to specify which individual changes will go into the merged version.

contributor

Any user of TeamXpress that modifies or creates content for the Web site. "Contributor" is a generic term that does not designate any specific TeamXpress role (e.g. Author, Editor, Administrator, or Master).

edition

A frozen, read-only snapshot of a branch of development. An edition contains a copy of all the files in the staging area at the time it was published. New editions can be released to production servers as complete, functional Web sites. Editions also serve as rollback points for projects in development, and they provide permanent archives of the Web site for Site Rollback. Editions are depicted in

TeamXpress with the icon. Editions that have been compressed to save disk space are depicted with the icon.

Editor

The owner of a workarea or workareas. Editors assign files to Authors, manage files, and edit and create files, submit content to the staging area, and may publish editions. Editors may have access to workareas that they do not own, but they cannot assign files in these workareas.

history

A complete record of all changes that have been made to a file through time. A user can see the complete history of a file by selecting it and selecting **History** from the **View** menu.

Home page

A user's overview of the TeamXpress system. By default, an Author's Home page will display his Task list. An Editor's or Administrator's Home page will display an overview of the TeamXpress system. The Home page can be set to any directory where the user has access.

initial edition

The first edition on a newly created branch. The initial edition serves as the original source of content for all workareas on a new branch. This edition may be empty, or it may be a copy of an edition from another branch.

job

A set of interdependent tasks. Each job is a specific instance of a workflow model.

locking

Restricting file access within a branch. Locking a file reduces the possibility of conflicting edits but also reduces the team's ability to work on files simultaneously. Every time a file is locked, the version in the workarea is compared with the version in the staging area and the latest is taken (although this behavior can be overridden). TeamXpress supports three types of locking, or locking models: Submit Locking, Optional Write Locking, and Mandatory Write locking. The locking model is defined at the branch level by the Administrator.

main branch

The first branch created when TeamXpress is installed. The Main Branch is owned by the Master user. All branches in the TeamXpress system are subordinate to the main branch.

Mandatory Write locking

A type of locking where users are required to lock a file in order to edit it. Until a user locks a file, all files in his workarea are read-only. Taking the write lock allows only a single person to modify the file at a given time, ensuring serial development and eliminating conflicting edits.

Master

The owner of the main branch. The Master user is responsible for the entire Web site. The Master organizes the structure of the TeamXpress system and coordinates the activities of all users, and can also perform all functions on all branches.

merge

The process of reconciling conflicts between versions of a file that have been edited by two people. The two versions can be merged in the staging area to produce a new version of the file, incorporating changes made by both users. Merging can be automated with TeamXpress's Advanced File Merging.

Navigation Window

The left-hand side of the TeamXpress window, which allows you to navigate through TeamXpress by clicking on the underlined names of branches, workareas, staging areas, editions, or directories.

Optional Write Locking

A type of locking in which users can choose to lock a file to ensure no other users edit the file, even within their own workareas. When a user locks a file, it becomes read-only to all other users. Under the Optional Write Lock model, locking files ensures serial development of those files and reduces the risk of conflicting edits

Private

Within a workarea, a user can mark a file as *Private*, which prevents the file from being submitted to the staging area if the file is a part of a workarea or directory that is submitted. It also prevents the file from being copied to another workarea during a *Copy To* operation.

Public

The opposite of *Private*, the *Public* function removes the private marking on a file. All files are public by default.

publish
   To create a new edition based on the current staging area.

Site Rollback
   The process of deploying a previous edition in place of the current Web site. Because TeamXpress editions are complete copies of the entire Web site at the time of publication, they can be referenced to revert to prior versions of files, directories, or the entire Web site.

SmartContext™ QA
   The use of individual workareas and staging areas to allow users to test their work in the context of the entire Web site without actually deploying the Web site. This allows Authors, Editors and Administrators to catch and fix their own mistakes at an early stage.

SmartContext™ Editing
   The ability to edit a file while browsing the Web site. This provides a simple, intuitive way of finding the file you want to edit, editing it in context and see your changes immediately.

staging area
   The area where users integrate the contents of their workareas. Users submit read-only copies of files from their workareas to the staging area to integrate with other contributions, and test the integrity of the resulting Web site. Staging areas are depicted in TeamXpress with the icon.

sub-branch
   A branch subordinate to a major branch. To separate development efforts among teams or team members, an Administrator can create sub-branches. The sub-branch receives its own unique staging area and workareas and generates its own editions. Editions published on a sub-branch can be integrated back into work on the higher branch, or released as stand-alone Web sites.

submit
   The act of transferring Web site content from a workarea to the staging area.

Submit Locking

A type of locking in which users can choose to lock a file to insure that their changes will be submitted to the staging area. While a file is locked, other users can edit their own version of the locked file within their workarea, but they cannot submit to the staging area. Once the lock holder has released the file lock, other users can merge their modifications with the new file version.

task

A unit of work performed by a single user or process. Each task in a job is associated with a particular TeamXpress workarea and carries a set of files with it.

task transition

Selecting a task transition moves the job along the workflow process by activating successor task(s).

TeamXpress templating

A TeamXpress module that allows you to configure the look and feel of your Web pages. For more information, consult *Using and Configuring TeamXpress Templating.*

template

A file that specifies attributes of another file, such as look and feel. When you create a file, you can choose to base that file on a template.

To Do list

A user's initial view of the TeamXpress system. The To Do list shows the user which tasks and jobs he is responsible for, and allows the user to do the necessary work to complete the tasks.

unlock

To remove a lock from a file. If an Editor has locked a file, the branch Administrator or Master user can also remove the lock. The Master user can remove any lock from any file.

user

A TeamXpress Author, Editor, Administrator, or Master.

Web site
   A generic term, meaning a set of interrelated files viewed through a browser. In TeamXpress, the term "Web site" generally refers to all the contents on a branch of development, though these may be a superset or a subset of an organization's actual Web site.

workarea
   A virtual copy of a Web site, which may be worked on independently without affecting the actual site or the work of other contributors. A workarea can be owned by a single user or a number of users together. Editors and Administrators can own workareas, but Authors cannot. Workareas are depicted in TeamXpress with the icon. Workareas cannot be created under the main branch.

workflow
   A system for defining the necessary processes for content creation and approval. See also "workflow model," "job," and "task."

workflow model
   A general workflow configuration that can be used repeatedly. Each workflow model describes a process which may include user tasks and a wide variety of automated tasks.

Work Window
   The right-hand side of the TeamXpress screen, which allows you both to navigate through TeamXpress and to manipulate files.

Index

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