



Department of Education
Student Financial Assistance (SFA)
Content Management
Functional Processes and Procedures



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1.0 Introduction

Background

Until recently, most enterprises used web channels only as a means to disseminate relatively static (stable and uniform) information. Today's enterprises are building highly dynamic sites where content is not only updated on a daily basis, but often changing in real-time using highly complex sites. Enterprises in today's high tech economy are facing both growing traffic and volume at online sites, as a result, there is significant growth in the amount of content contained by their websites. In general, the aging methods and techniques for maintaining online content are time-consuming, costly and inefficient. There was a growing need to enable businesses to update and maintain content in a more direct and timely fashion causing the rise in demand for specialized content management processes and applications.

The intent of this document is to present a comprehensive, integrated view of web content management. We will introduce the working definitions of the terms "web content" and "web content management", and describe the various types of web content and the key content characteristics that apply to SFA. The process for SFA web content management will be discussed at high-level and then broken down into specific roles, tasks, and procedures. Finally, we will focus on Interwoven's TeamSite, and how this web content management tool will be used to enable SFA's web content management process.

What is Web Content?

Web content can be made very simple. It can be an icon, a headline, a publication, audio tracks, video film clips or news updates. Web content is collectively the text, audio/video, graphics, and applications that comprise the end-user's total experience online. For the working definition we'll define **web content** as any discrete component that can be stored digitally, managed as a piece of meaningful content and distributed to one or more web based channels. The content for the SFA's Intranet is in the form of news updates, headlines, calendar events, publications, forms, policies and procedures. The Content Contributors, Content Managers and content shop will utilize the content management software (Interwoven's TeamSite) and content development tools (such as the SFA standard HTML editor, Word, etc.) to create, manage, and deliver the content from the business unit to the content shop to publication on the server.

SFANet web content is primarily static content containing text files and graphics. Content on SFANet includes SFA news, forms, policies and procedures, organizational information, performance reports and modernization information.



What is Web Content Management?

Web content management is a set of tasks and processes that manages the addition, revision, and deletion of the content targeted for publication on the web from the content's creation to archiving. The **content management workflow** is the set of actions that take the content through development to production. This is the system for defining the necessary steps for creation and approval. The content management workflow includes user tasks and a variety of automated tasks.

SFA Web Content Management Process Architecture

High Level (Tier 1) Web Content Management Process Architecture

SFA's web content management processes are based on the premise that there will be a centralized content shop to manage the content posted to SFANet. The Tier 1 Web Content Management Process Architecture contains three core processes: Content Creation, Content Management and Content Delivery. Interwoven's TeamSite software technically enables these processes by providing a flexible and scalable solution for managing web content.

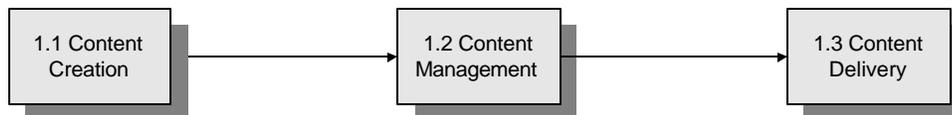


Figure 1 – High Level (Tier 1) Web Content Management Architecture



Detailed (Tier 2) Web Content Management Process Architecture

The Tier 2 view of the Web Content Management processes provides a detailed view of how an idea for content gets published to SFANet. These processes will be used on a daily basis by SFANet Content Contributors, SFANet Content Managers and the SFANet Applications Management Group.

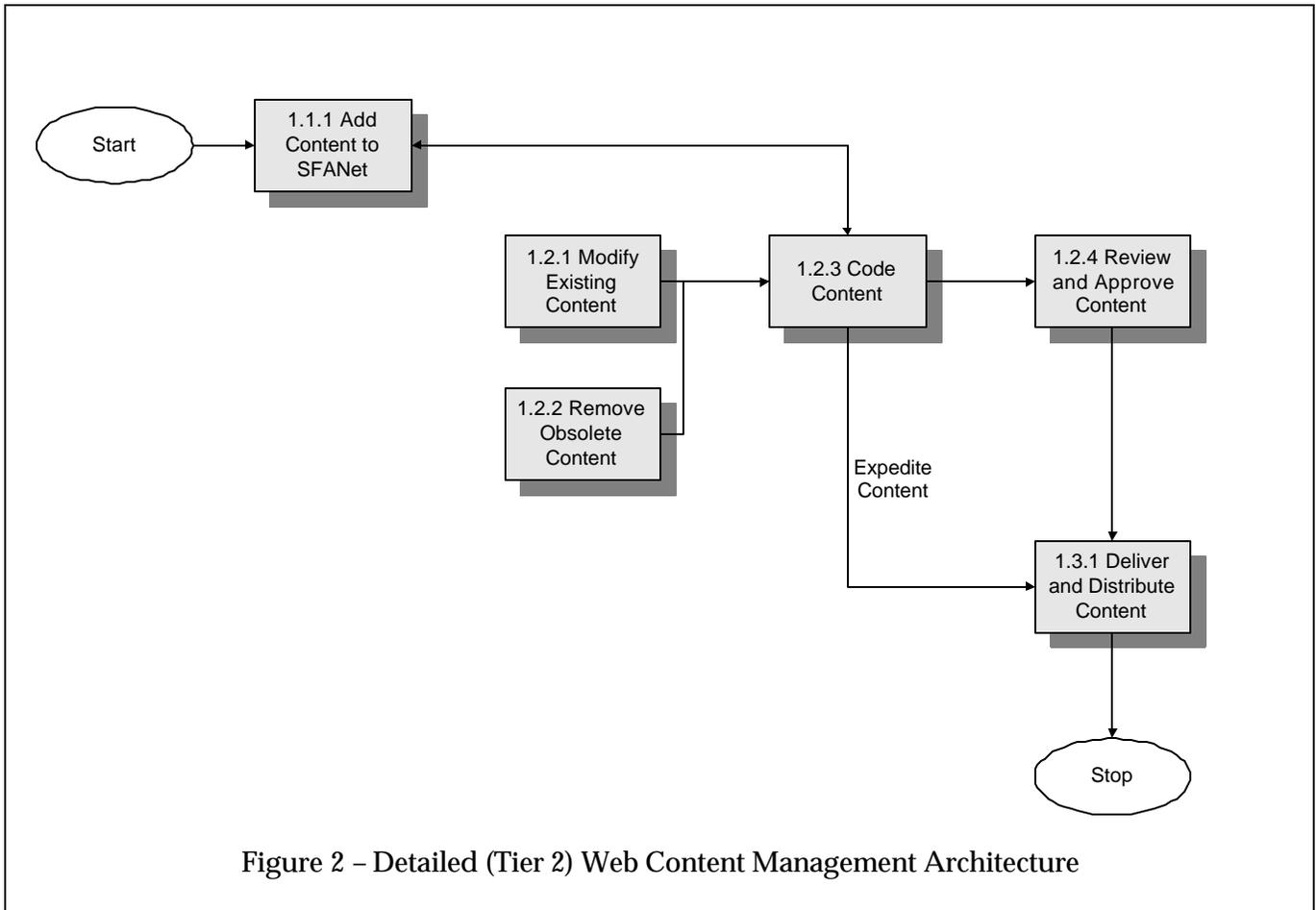


Figure 2 – Detailed (Tier 2) Web Content Management Architecture



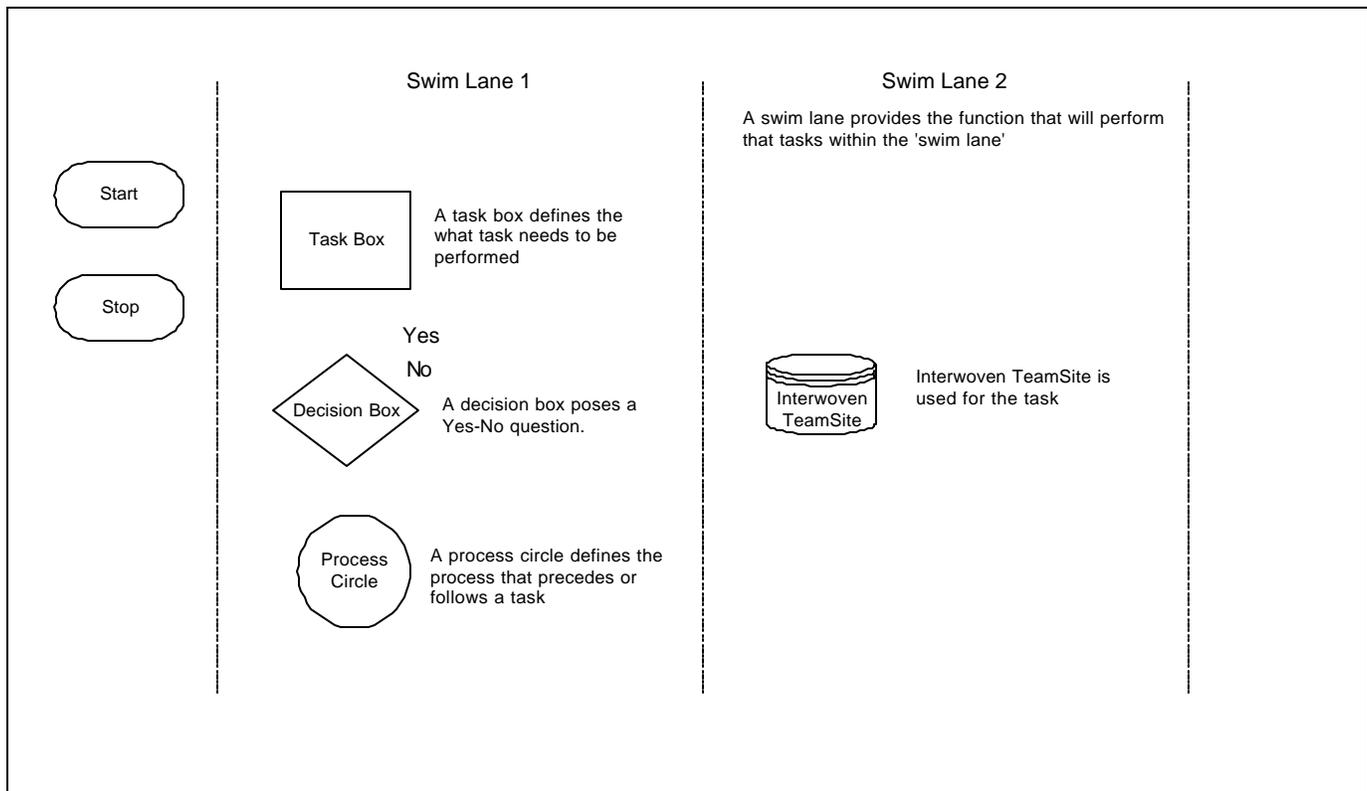
Ref. #	Process Description	Responsibility/ Process Owner	Tools	Outcomes
1.1.	<p>Content Creation – This process defines the actions to be undertaken by the SFANet Content Contributors and Content Managers within the SFA business units. Ideas are formulated by SFA employees who serve as SFANet Content Contributors. The Content Contributor documents his/her idea in the appropriate format for the Content Manager in his/her business unit. Each business unit has a Content Manager who will review and approve the content and create a job in Interwoven to initiate the content management process. The Content Manager provides a description of the work to be done and attaches any necessary files to the Interwoven job.</p>	<p>Content Contributors and Content Managers within the SFA business units</p>	<p>Content creation tools such as Word, Excel, PowerPoint and HTML editor tools and Interwoven TeamSite</p>	<p>Content idea formulated and documented and job created in Interwoven by Content Manager</p>
1.2	<p>Content Management – This process defines the actions to manage content once it has been created and resides in Interwoven TeamSite and on SFANet. Once an Interwoven job is created to add, modify or remove content it resides in the 'To Do' list. Content programmers will view the To Do list and select a job to complete. The content programmer will use a web-authoring tool to code the changes to add, modify or remove the content and will view these changes using a virtual copy of SFANet in Interwoven. Next, the content management lead reviews the content to ensure that it conforms to SFA style guide, usability and accessibility guidelines. Grammar, spelling and accuracy will also be checked. The content is then submitted to the staging area within Interwoven where it is ready for deployment to the SFANet web server.</p>	<p>SFANet Applications Management Content Management Lead, SFANet Applications Management Content Programmer(s)</p>	<p>Interwoven TeamSite, HTML editor tools, Adobe, etc</p>	<p>Content is coded, reviewed, approved, and submitted to the staging area within Interwoven TeamSite</p>



Ref. #	Process Description	Responsibility/ Process Owner	Tools	Outcomes
1.3	<p>Content Delivery – This process defines the actions to be undertaken by the SFANet Applications Management Group with support from the SFA CIO (Webmaster) and the Virtual Data Center. The Applications Management Content Management Lead conducts a final review of the entire site (within the staging area) prior to publishing a new edition of SFANet. Then, the Content Management Lead works with the Webmaster and VDC to deploy the site to the production server.</p>	<p>Applications Management Content Management Lead, Webmaster and Virtual Data Center</p>	<p>Interwoven TeamSite, Open Deploy and Data Deploy</p>	<p>New edition of SFANet deployed to the production server</p>

Process Workflow Diagram Legend

The following pages include detailed process workflow diagrams for the web content management processes. Listed below is a legend of symbols that will be used to illustrate these processes.





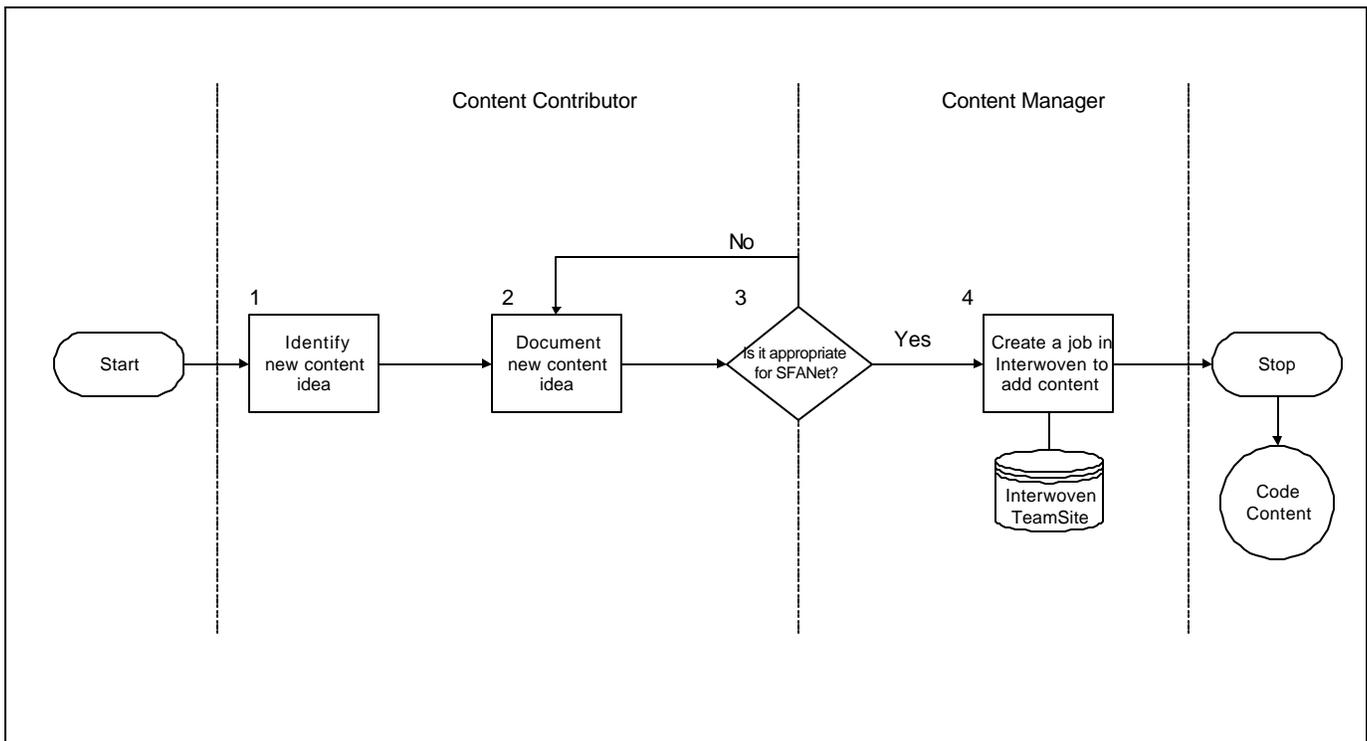
1.1 Content Creation Process

The content creation process defines the actions to be undertaken by the SFANet Content Contributors and Content Managers within the SFA business units. Ideas are formulated by SFA employees who serve as SFANet Content Contributors. The Content Contributor documents his/her idea in the appropriate format (e.g. Word, Excel, PowerPoint, SFA standard HTML editor, etc.) for the Content Manager in his/her business unit. Each business unit has a Content Manager who will review and approve the content and create a job in Interwoven to initiate the content management process. The Content Manager provides a description of the work to be done and attaches any necessary files to the Interwoven job. This job resides in Interwoven and is reviewed in the content management processes.

1.1.1 Add Content to SFANet

This process defines the actions to be undertaken by Content Contributors and Content Managers to add new content SFANet. This process is used for NEW content that is being added to SFANet for the FIRST time.

1.1.1 Add Content to SFANet Process Workflow





1.1.1 Add Content to SFANet Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Identify New Content Idea – The Content Contributor identifies information or has an idea that is relevant for posting on SFANet.	Content Contributor within an SFA business unit	N/A	Content idea formulated
2.	Document New Content Idea – The Content Contributor documents the content idea within the appropriate tool. This step takes it from idea to content documented in a tool. It is forwarded to the Content Manager for review.	Content Contributor within an SFA business unit	Microsoft Office suite of tools or SFA standard HTML editor	Content idea created
3.	Is it Appropriate for SFANet – This is a check point to make sure the right information is going to the right audience at the right time. Grammar, spelling and accuracy are also checked at this point. If (Yes) – The process continues on with step 4. If (No) – The Content Manager communicates the required changes and the process goes back to step 2.	Content Manager	N/A	Content idea reviewed and approved
4.	Create a Job in Interwoven to Add Content – The Content Manager within each channel who is responsible for pushing all new content to the content shop creates a new job in Interwoven TeamSite. The Content Manager provides a description of the work to be done and attaches any necessary files.	Content Manager	Interwoven TeamSite	Job created in Interwoven with description of work to be completed and content attached
Stop				



1.2 Content Management Processes

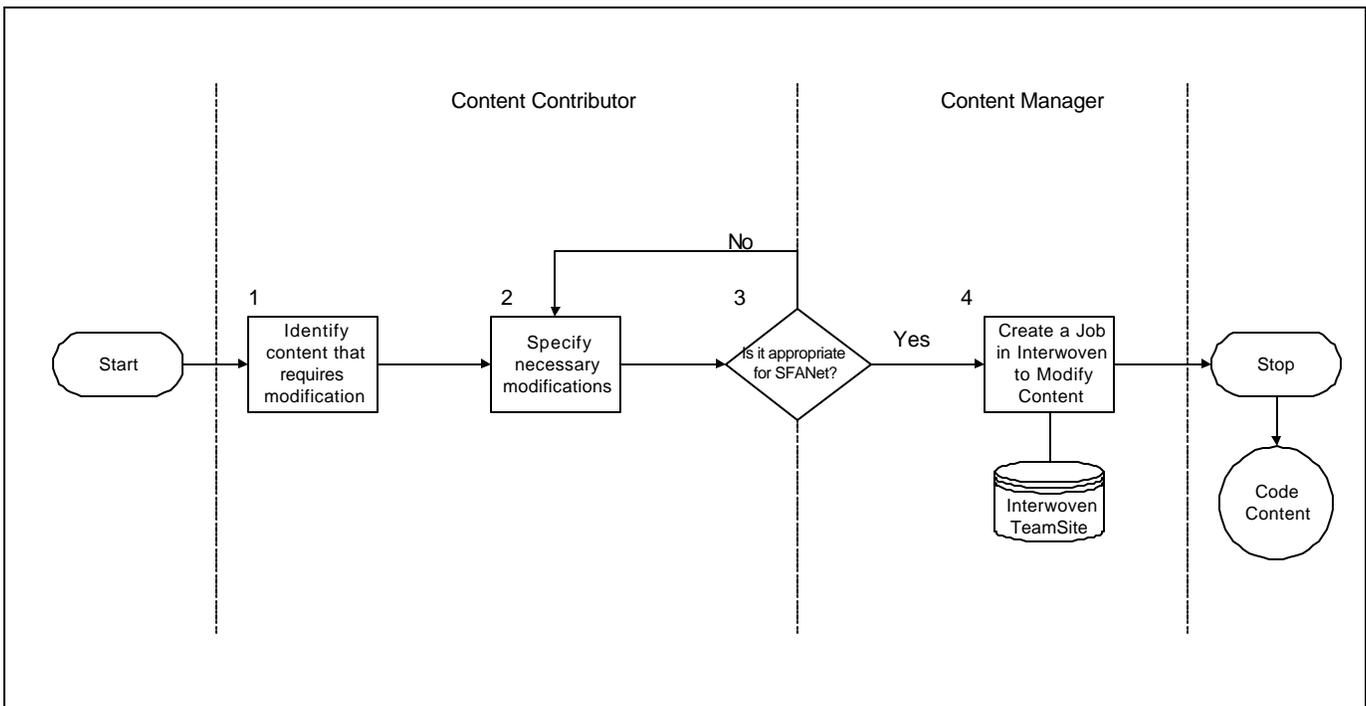
The content management processes define the actions to be undertaken by the SFANet Applications Management Group to manage SFANet content once it has been created and resides in Interwoven TeamSite and on SFANet. Once an Interwoven job is created for to add, modify or remove content it resides in the 'To Do' list. Content programmers will view the To Do list and select a job to complete. The content programmer will use a web-authoring tool to code the changes to add, modify or remove the content and will test these changes using a virtual copy of SFANet in Interwoven. Next, the content management lead reviews the content to ensure that it conforms to SFA style guide, usability and accessibility guidelines. Grammar, spelling and accuracy will also be checked. In some cases, the Content Manager who submitted the content will be request to review and approve the content before it is deployed to production. The content is then migrated to a staging area within Interwoven where it is ready for deployment to the SFANet web server.

Content management processes include modify existing content on SFANet, remove obsolete content from SFANet, code content for SFANet and review and approval of content.

1.2.1 Modify Existing Content on SFANet

This process defines the actions to be undertaken by Content Contributors and Content Managers to modify existing SFANet content.

1.2.1 Modify Existing Content on SFANet Process Workflow





1.2.1 Modify Existing Content on SFANet Process Workflow Description

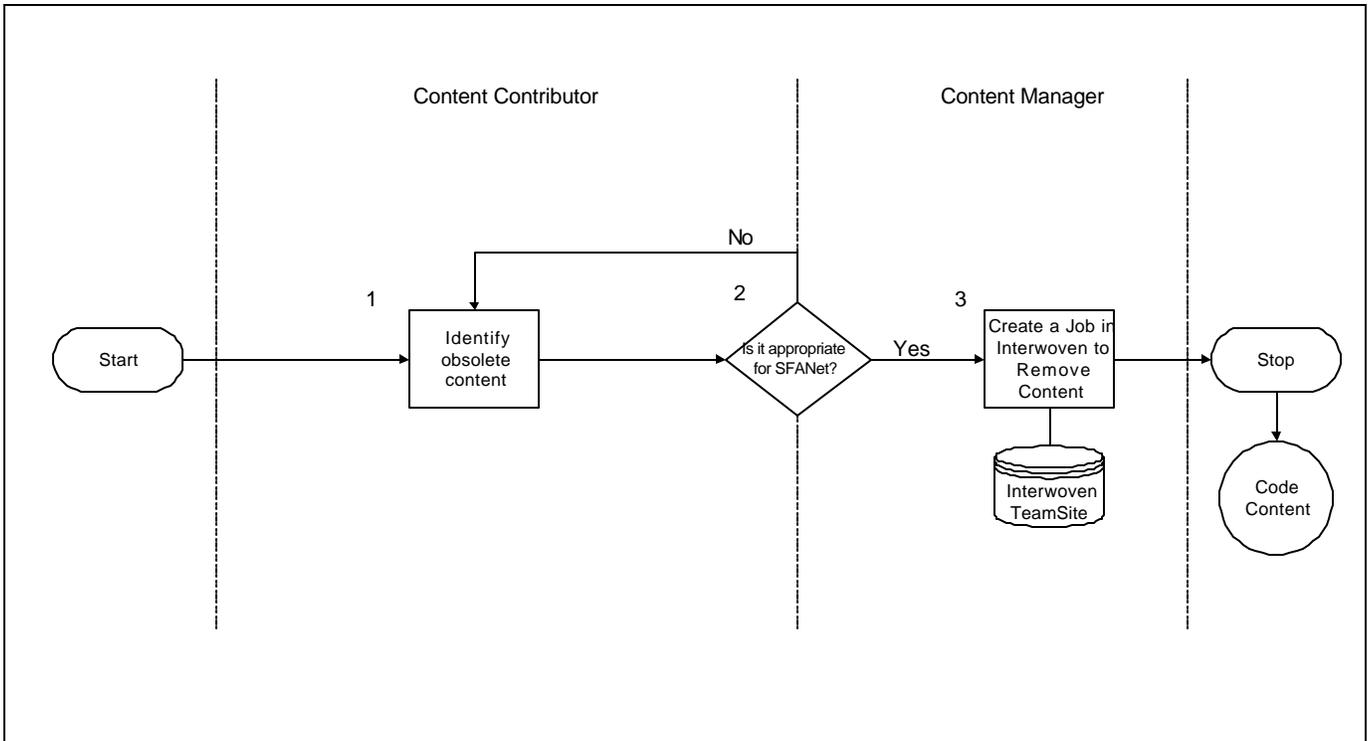
Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Identify Content That Requires Modification – The Content Contributor periodically reviews his/her pages on SFANet to determine if any pages are in accurate or outdated. The Content Contributor identifies information that requires modifications.	Content Contributor within an SFA business unit	N/A	SFANet content that requires modification identified
2.	Specify necessary modifications – The Content Contributor modifies the existing SFANet content and forwards it to the Content Manager for review.	Content Contributor within an SFA business unit	Microsoft Office suite of tools or SFA standard HTML editor	Content modified
3.	Is it Appropriate for SFANet – This is a check point to make sure that this is the right information going to the right audience at the right time. Grammar, spelling and accuracy are also checked at this point. If (Yes) – The process continues on with step 4. If (No) – The Content Manager communicates the required changes and the process goes back to step 2.	Content Manager	N/A	Modified content reviewed and approved
4.	Create a Job in Interwoven to Modify Content - The Content Manager within each channel who is responsible for pushing all modifications to existing content to the content shop creates a new job in Interwoven TeamSite. The Content Manager provides a description of the content to be modified and attaches any necessary files.	Content Manager	Interwoven TeamSite	Job created in Interwoven with description of work to be completed and modified content attached
Stop				



1.2.2 Remove Obsolete Content From SFANet

This process defines the actions to be undertaken by Content Contributors and Content Managers to remove obsolete content from SFANet.

1.2.2 Remove Obsolete Content From SFANet Process Workflow





1.2.2 Remove Obsolete Content From SFANet Process Workflow Description

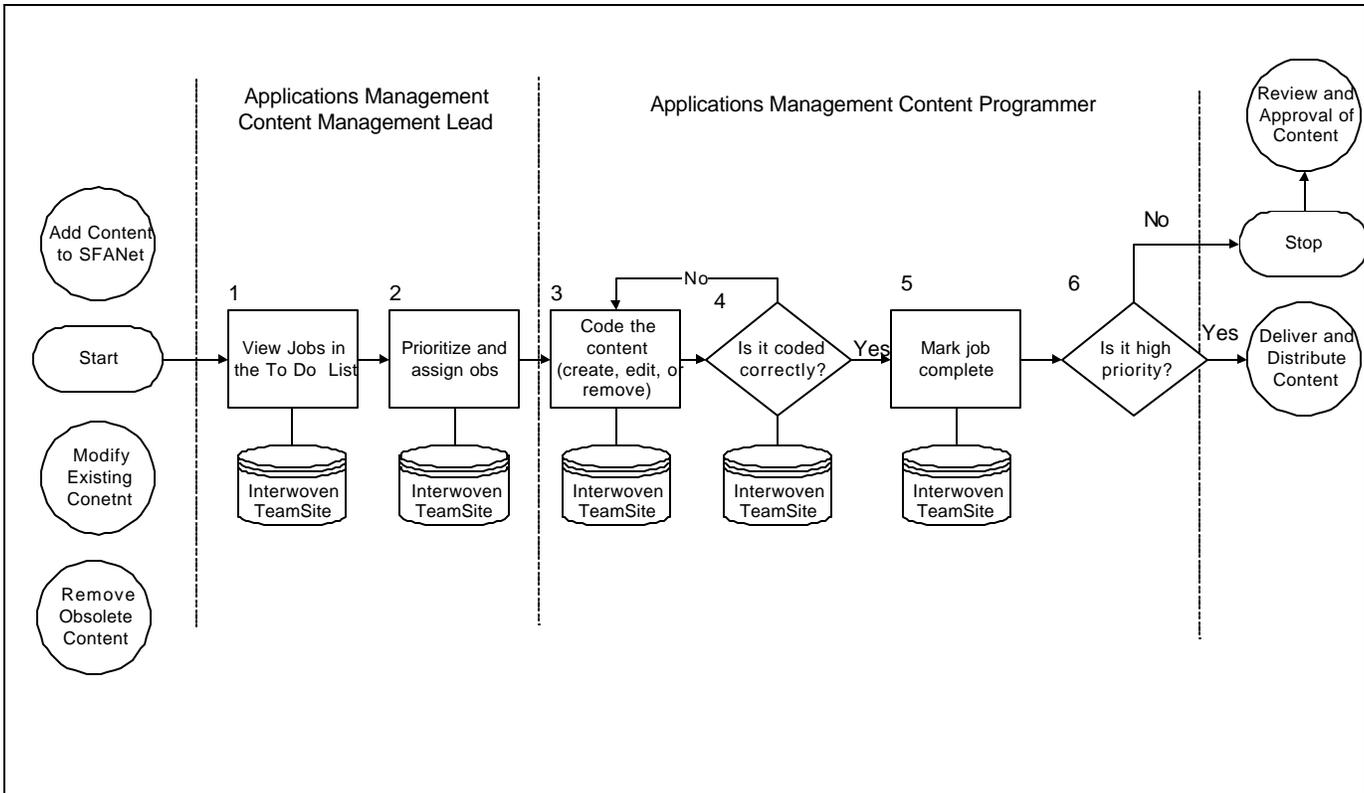
Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Identify Obsolete Content – The Content Contributor identifies information that is inaccurate, outdated, or no longer relevant that should be removed from SFANet. This is documented and forwarded to the Content Manager.	Content Contributor within an SFA business unit	N/A	Obsolete content identified
2.	Is it Appropriate for SFANet – This is a check point to make sure that the information should truly be removed from SFANet. If (Yes) – The process continues on with step 3. If (No) – The Content Manager communicates to the Content Contributor the reason for rejecting the removal request.	Content Manager	N/A	Review of content to be removed completed
3.	Create a Job in Interwoven to Remove Content – The Content Manager creates a delete job in Interwoven TeamSite. The Content Manager provides a description of the content to be removed.	Content Manager	Interwoven TeamSite	Delete job created in Interwoven with description of content to be removed
Stop				



1.2.3 Code Content for SFANet

This process defines the actions to be undertaken by the SFANet Applications Management to receive content from Content Managers and code the content for publishing on SFANet.

1.2.3 Code Content Process Workflow





1.2.3 Code Content Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	View Jobs in the 'To Do' List – The content programmer reviews the 'To Do' list in Interwoven for jobs created by Content Managers.	Applications Management Content Management Lead	Interwoven TeamSite	To do list reviewed
2.	Prioritize and Assign Jobs – The Application Management Content Management Lead prioritizes the Jobs and assigns them to a Content Programmer to be worked.	Applications Management Content Management Lead	Interwoven TeamSite	Job prioritized and assigned to Content Manager
3.	Code the Content (Create, Edit or Remove Content) – The content programmer reviews the description of work to be accomplished that was provided by the Content Manager. The content programmer performs any coding that is necessary to create, modify or remove content.	Applications Management Content Programmer	Interwoven TeamSite and HTML authoring tools	Content changes coded
4.	Is it Coded Correctly? – The content programmer will test the content changes using the virtual copy of SFANet that is accessed within Interwoven to ensure it is accurate, has the proper look and feel and meets SFA web standards. If (Yes) – The process continues with step 5. If (No) – The content programmer goes back to step 3.	Applications Management Content Programmer	Interwoven TeamSite	Content coded and tested within SFANet context
5.	Mark Job Complete – The content programmer marks the job complete in Interwoven and the work will be routed to the review and approval process.	Applications Management Content Programmer	Interwoven TeamSite	Job marked complete



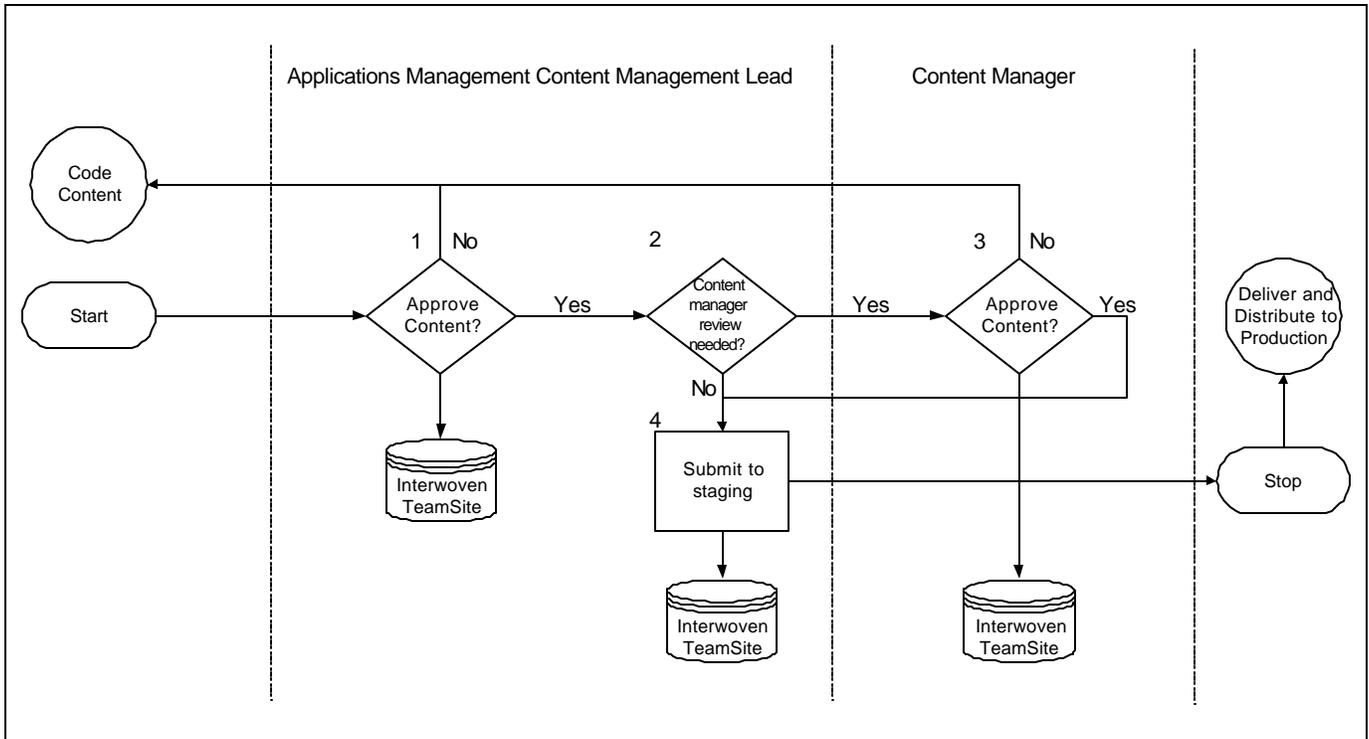
Step #	Step Description	Responsibility	Tools	Outcomes
6.	<p>Is it High Priority? – The Content Manager should provide information to determine whether the addition of this content needs to be expedited.</p> <p>If (Yes) – The process skips the review and approve process and goes straight to deliver and distribute process.</p> <p>If (No) – The process continues onto the review and approve process.</p>	<p>Applications Management Content Management Lead and Content Manager</p>	<p>Interwoven TeamSite</p>	<p>Determination of whether content should be expedited</p>
Stop				



1.2.4 Review and Approve SFANet Content

This process defines the actions to be undertaken by the SFANet Applications Management to review and approve coded content.

1.2.4 Review and Approve SFANet Content Process Workflow





1.2.4 Review and Approve SFANet Content Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	<p>Approve Content? – The content is assigned to the Content Management Lead for review who reviews the content to determine if it is consistent with SFA design standards and accessibility guidelines.</p> <p>If (Yes) – The process continues on with step 2. If (No) – The Content Manager communicates needed changes and the process goes back to the Code Content process.</p>	Applications Management Content Management Lead	N/A	Content idea reviewed and approved
2.	<p>Content Manager Review Needed? – Based on the type and importance of content, the Applications Management Content Management Lead will determine if the content needs to be reviewed and approved by the Content Manager who submitted the content.</p> <p>If (Yes) – The process continues on with step 3. If (No) – The process skips step 3 and proceeds to step 4.</p>	Applications Management Content Management Lead	N/A	Decision regarding whether the Content Manager needs to approve the content
3.	<p>Approve Content? – The content is reviewed by the Content Manager who submitted the content to determine if the content should be authorized for production.</p> <p>If (Yes) – The process continues on with step 4. If (No) – The Content Manager communicates needed changes and the process goes back to the Code Content process.</p>	Content Manager within an SFA business unit	Interwoven TeamSite	Coded content reviewed and approved by Content Manager



Step #	Step Description	Responsibility	Tools	Outcomes
4.	Submit to Staging – The Content Manager submits the content to the TeamSite staging area where the entire site resides as a read-only copy.	Applications Management Content Management Lead	Interwoven TeamSite	Content submitted to the staging
Stop				



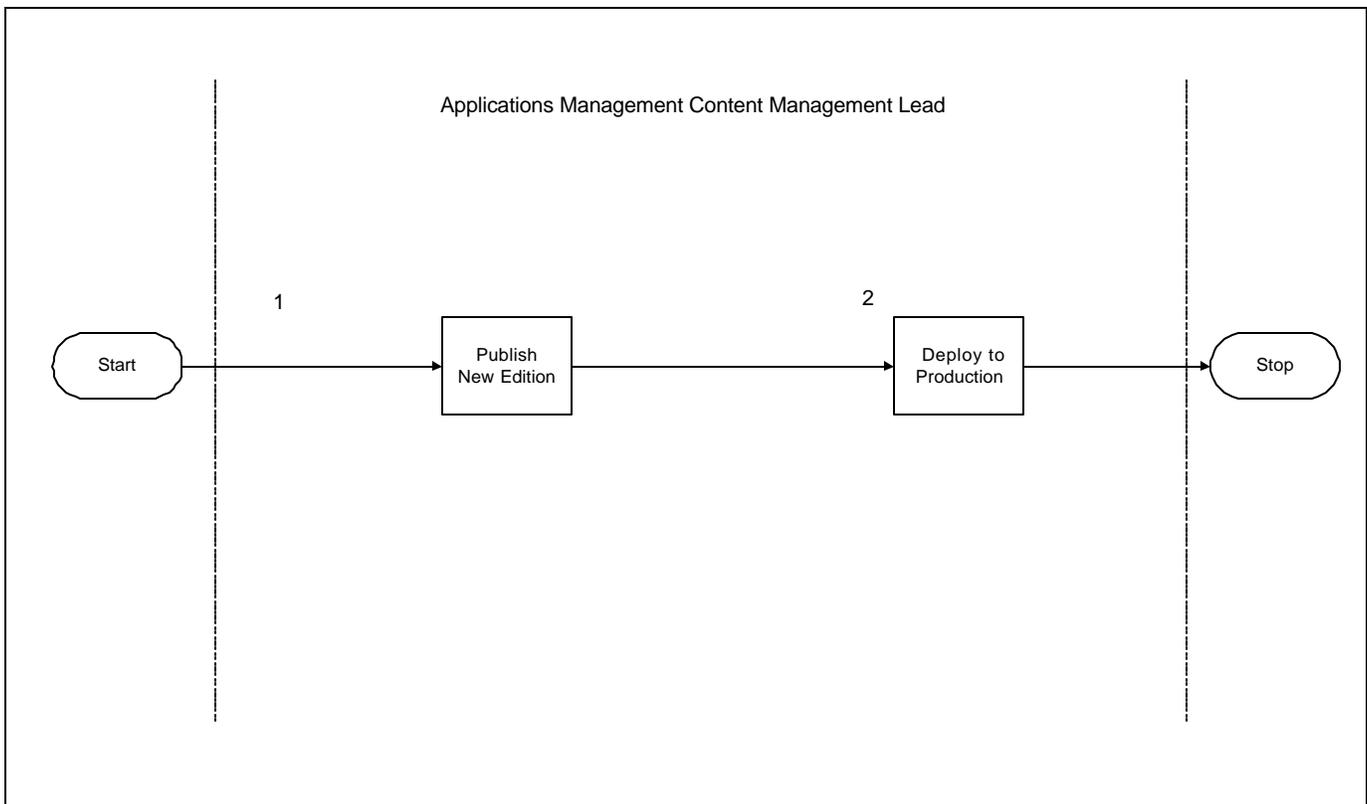
1.3 Content Delivery Processes

The content delivery process defines the actions to be undertaken by the SFANet Applications Management Group with support from the SFA CIO (webmaster) and the Virtual Data Center. The Applications Management Content Management Lead publishes a new edition of SFANet. Then, the Content Management Lead works with the Webmaster and VDC to deploy the site to the production server using Interwoven Open Deploy.

1.3.1 Deliver and Distribute to Production

This process defines the actions to be undertaken by the SFANet Applications Management to deliver and distribute new editions of SFANet to production. Users can view the new content created by the business units.

1.3.1 Deliver and Distribute to Production Process Workflow





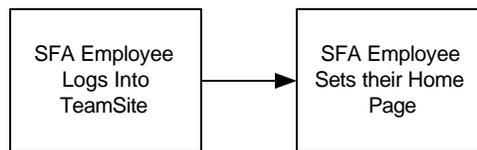
1.3.1 Deliver and Distribute to Production Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Publish New Edition – After the content has been submitted to staging, the Applications Management content management lead publishes a new edition of SFANet.	Applications Management Content Management Lead	Interwoven TeamSite	New edition of SFANet created
2.	Deploy to Production – The new edition of SFANet is deployed to the SFA Net production server using Interwoven Open Deploy. This can be a manual or automated process.	Applications Management Content Management Lead	Interwoven Open Deploy	New edition of SFANet deployed to the SFANet production server and available for consumption by SFA employees
Stop				



2.0 TeamSite Functional Procedures

Accessing TeamSite



Section 4.0 will cover the first step of using Interwoven's TeamSite Application Software. In this section, you will learn how to log on to TeamSite and Set up your Home Page. When logging into TeamSite for the first time, LaunchPad will automatically download and install on your local computer. LaunchPad is a small helper application that resides on you local computer, which allows you to make associations between file types and the editing applications you use. It's totally transparent to the user; you don't have to do anything.





Logging Into TeamSite



SPECIAL NOTE: These procedures are written using Microsoft Internet Explorer. You can use Netscape, however, additional steps will have to be performed due to Netscape's functionality being different from Microsoft Internet Explorer. Please pay attention to the entire sentence and not only the **BOLD** words. This will reduce any uncertainty while executing the procedural steps.

NOTE: The first time you log in, Launch Pad will automatically install on your local computer. You don't have to do anything. **This is a one-time action.**

Process	Steps
SFA employee Logs into TeamSite for Content Management Tasks.	<ul style="list-style-type: none">• Click your TeamSite/Browser Icon from your desktop• From the Login as Pull Down Menu; select your user type (i.e. author, editor, or administrator)• Enter your Username in the User Name Field• Enter your Password in the Password Name Field• The Domain Name will not need to be changed• Click the Login Button



Setting your Home Page

SFA Employee
Sets their Home
Page

Process	Steps
SFA employee sets their Home Page.	<p>NOTE: Your Home Page will be stored on the TeamSite Server. You can change this setting at any time, or reset it to the default setting.</p> <ul style="list-style-type: none">• In the TeamSite GUI, Navigate to the location or workflow view that you would like to go to when you first log in• Click the Edit Pull Down Menu• Click Set Home Page



Completing Tasks



This section will cover the procedures to complete a Task. This area describes how the Content Manager will create a Job and the steps the Author will take to view the Job. Next the Author will accomplish the Task and send their comments back to the Content Manager so they know the task has been completed; the Author can also provide additional comments for the Content Manager, if necessary. The last part of this section covers how the Content Manager will view the Authors comments concerning the Task they completed and how to view all Tasks / Jobs listed in TeamSite.





Creating a Job in the To Do List



Process	Steps	What you will see!
<p>Content Manager Creates a Job for the SFA Employee.</p>	<ol style="list-style-type: none"> 1. Log in as an Editor or Higher. <ul style="list-style-type: none"> • If the To Do Button is displayed below the Edit Pull Down Menu, after logging in instead of the Work Area Button, Click it Once. The To Do Button has a Document with a Check Mark in the center. 2. Create the New Task <ul style="list-style-type: none"> • Click the File Pull Down Menu • Click New Job • Click the Button next to the Workflow Template you want to use • Enter descriptive comments in the Enter a Description for the New Job Field • Click New Job • Click the Select Author Pull Down Menu • Click the User Type you want to complete the Job • Type the description of the job in the Task Description Field • Click the Enter Branch Pull Down Menu • Click the Branch you want the Job to be posted in • In the Enter Work Area Field, type the Work Area Name.(The Work Area Name is Case Sensitive, so be sure to type it exactly as it appears in TeamSite) • Click the Run Job Button 	<ul style="list-style-type: none"> • The Work Area Button should be visible, the Work Area Button has a Folder with a Pencil in the Center and is located directly below the Edit Pull Down Menu. • A New Job Window will appear asking you to select the Workflow Template you want to base the job on • A New Job Template Window will appear with different Pull Down Menus and Fields • Your Job is now entered in TeamSite

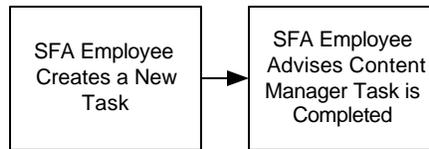


Viewing Tasks / Jobs in the To Do List

SFA Employee
 Views Task / Job
 In the To Do List

Process	Steps	What you will see!
<p>SFA employee views their Task(s)/ Job in the To Do list.</p>	<ol style="list-style-type: none"> 1. Log in as an Author and view your environment <ul style="list-style-type: none"> • If the Tasks / Jobs that are assigned to you are not visible, click the To Do Button. The To Do Button has a document with a Check Mark in the Center and is Directly Below the Edit Pull Down Menu. (Your Tasks / Jobs will be visible and the Work Area Button will be displayed directly below the Edit Pull Down Menu) 2. To view information about the task <ul style="list-style-type: none"> • Click the Job Options Pull Down Menu • Click Job Details • You can click the Job Link (that will have a 5 digit number next to it) in this Window to see additional information which will Open another Window displaying information concerning the Job Link you just clicked • Click the Close Button to close the Job Details Window 	<ul style="list-style-type: none"> • The To Do List displays two Pull Down Menus: Task Options, on the Left side of the screen and Job Options, on the Right side of the screen. These menus allow you to obtain further information on the Tasks or Jobs • A Job Details Window will appear with the Job Details.

Creating a New Task



Process	Steps	What you will see!
<p>SFA employee creates a new task based on the Content Managers request.</p>	<ol style="list-style-type: none"> Log in as an Author and set up your environment <ul style="list-style-type: none"> If the Tasks / Jobs that are assigned to you are not visible, click the To Do Button. (The To Do Button has a document with a Check Mark in the Center and is Directly Below the Edit Pull Down Menu. The To Do List displays two Pull Down Menus: Task Options, on the Left side of the screen and Job Options, on the Right side of the screen) Add the New File <ul style="list-style-type: none"> Click the Task Options Pull Down Menu Click Start Task Click the Select Task Operation Pull Down Menu on the Right side of the screen Click Add New File Click the Directory Location by clicking the Directory Folder Icon (It is located next to the words Select Directory) Type the File Name in the File Name Field (The File Name must include the File Name Extension such as Test.doc or Test.html.) <p>NOTE: By not including the File Name Extension, your document will be created in Microsoft WordPad. Whatever File Name Extension is used, the associated application program will be opened (.doc = Word, .xls = Excel, .ppt = PowerPoint). When creating a New File, you will Never use the Select Template Field.</p> <ul style="list-style-type: none"> Click the OK Button Maximize the TeamSite LaunchPad Window if it is minimized. Click the File you just created Once Click the Edit Button at the Bottom of the LaunchPad Window Click the Yes Button—If a Window appears asking “Do you want to revert to the saved file”, Type your information in the document Save and Close the document. (You don’t have to identify where the document will be saved, TeamSite will perform this function in the following steps.) <ul style="list-style-type: none"> Maximize the TeamSite LaunchPad Window if it is minimized. (The Document Icon in the LaunchPad Window will have a Pencil in the Center indicating the document has 	<ul style="list-style-type: none"> Your Tasks/ Jobs will be visible and The Work Area Button will be displayed directly below the Edit Pull Down Menu The TeamSite LaunchPad Window will open with the name of the document you created and the document will also open



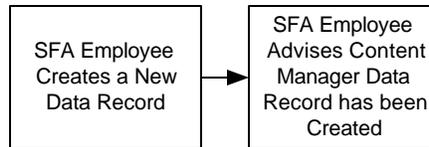
Process	Steps	What you will see!
	<p>been modified)</p> <ul style="list-style-type: none"> • Click Once on the Document • Click the Upload Button • Click the Remove Button. (This will remove the file in your Windows Temporary Directory on your Hard Drive, this file is not needed) • Close the TeamSite Launch Pad Window • Maximize the Task Details Window if it is Minimized. • Click the Close Button 	<ul style="list-style-type: none"> • Another TeamSite LaunchPad Window will be displayed saying; Remove the Temporary Local Copies After Uploading. • Closes the Task Details Window
<p>SFA Employee advises the Content Manager or Editor that the Task has been completed.</p>	<p>Mark the Task Complete</p> <ul style="list-style-type: none"> • Click the Task Options Pull Down Menu • Click Done • Type any comments you want to send the Content Manager in the Transition Comment Field • Click the Transition to Next Task Button 	<ul style="list-style-type: none"> • A TeamSite Task Transition Window will be displayed



Process	Steps	What you will see!
<p>SFA Employee advises the Content Manager or Editor that the task has been completed.</p>	<p>Mark the Task Complete</p> <ul style="list-style-type: none"> • Click the Task Options Pull Down Menu • Click Done • Type any comments you want to send the Content Manager in the Transition Comment Field • Click the Close Button 	<ul style="list-style-type: none"> • Closes the Task File Window • A TeamSite Task Transition Window will be displayed • Closes the Task Transition Window



Create a New Data Record



Process	Steps	What you will see!
<p>SFA employee completes a New Data Record.</p>	<ol style="list-style-type: none"> 1. Log in as an Author <ul style="list-style-type: none"> • If the Tasks / Jobs that are assigned to you are not visible, click the To Do Button. The To Do Button has a document with a Check Mark in the Center and is Directly Below the Edit Pull Down Menu. After clicking the To Do Button, 2. Creating the New Data Record <ul style="list-style-type: none"> • Click the Task Options Pull Down Menu • Click Start Task • Click the Select Task Operation Pull Down Menu on the right side of the screen • Click New Data Record • Click one of the boxes next to the Select Data Type Categories • Type the Data Record Name in the Data Record Name Field • Click the Continue Button • An Edit Window will be displayed • Type your information in each Field <p>NOTE: There are Four options at this point (Save and Preview, Save and Exit, Save and Generate, and Cancel).</p> <p>3a. By clicking Save and Preview Button, your New Data Record will be saved and displayed by which Template you choose</p> <p>3b. By clicking the Save and Exit Button, your New Data Record will be saved and a Window will be displayed saying Your Record has Been Saved.</p> <ul style="list-style-type: none"> • Click the OK Button on this Window <p>3c. By clicking the Save and Generate Button</p> <ul style="list-style-type: none"> • Click the box of your choice next to Select Data Type • Enter the name of the Directory in the Directory Field • Click the Continue Button • Click one of the boxes under Data Records • Enter the File Name on the File Name Field 	<ul style="list-style-type: none"> • Your Tasks/ Jobs will be visible and the Work Area Button will be displayed Directly Below the Edit Pull Down Menu . • A TeamSite Task Details Window will be displayed • A New Data Record Window will be displayed • A Generate HTML: Step 1 Window will be Displayed • A Generate HTML: Step 2 Window will be Displayed



Process	Steps	What you will see!
	<p>3d. Click the Cancel Button</p> <p>NOTE: There are four options at this point (Back Button Preview Button, Generate/Save Button, and the Exit Button).</p> <ul style="list-style-type: none"> • Click the Back Button • Click the Preview Button • Click the Generate/Save Button • Click the Exit Button 	<ul style="list-style-type: none"> • You will cancel the operation • You will go back to Generate HTML: Step 1. • You will preview the Data Record in the Template you choose • You will save the Data in the Template you choose • You will exit the operation
<p>SFA Employee advises the Content Manager the New Data Record has been Completed.</p>	<p>Mark the Task Complete</p> <ul style="list-style-type: none"> • Click the Task Options Pull Down Menu • Click Done • Type any comments you want to send the Content Manager in the Transition Comment Field • Click the Transition to Next Task Button 	<ul style="list-style-type: none"> • A TeamSite Task Transition Window will be Displayed • The next task is displayed



Viewing Comments From An Author or Higher

Content Manager
 Views Coments
 From The Author

Process	Steps	What you will see!
<p>The Content Manager views comments from the Author.</p>	<p>Log on as an Editor or Higher</p> <ul style="list-style-type: none"> • Click the To Do Button if the Tasks are not displayed • Click the Job Options Pull Down Menu on the Right side of the screen • Click Job Details • Click the Close Button when finished viewing comments 	<ul style="list-style-type: none"> • A Job Details Window will be displayed with the Authors Comments



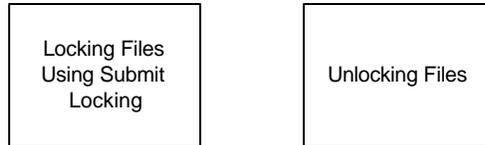
Viewing All Jobs

Content Manager
Views Available
Jobs

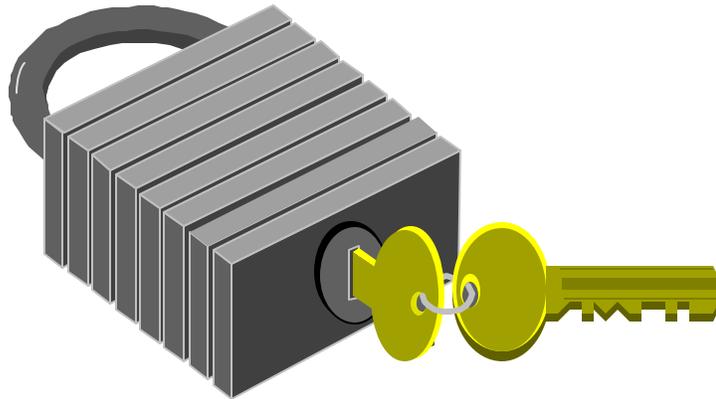
Process	Steps	What you will see!
View all available jobs.	Log on as an Author or Higher <ul style="list-style-type: none">• Click the To Do Button if the Tasks are not displayed	<ul style="list-style-type: none">• A list of All Jobs will be displayed



Locking and Unlocking Files Using Submit Locking

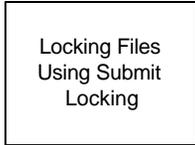


This section covers how to Lock Files using Submit Locking and how to Unlock files. TeamSite supports three different types of File Locking: 1) Submit Locking, 2) Optional Write Locking, and 3) Mandatory Write Locking. TeamSite is configured to support only Submit Locking so you won't have to execute Optional Write Locking and Mandatory Write Locking. If you want more information on these Locking Options, see Appendix A. Submit Locking allows only the user who locks the file to submit it to the Staging Area. Other users are allowed to edit a locked file in their Work Area, however, the user who holds the lock must release it before it can be submitted to the Staging Area.





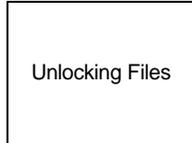
Locking Files Using Submit Locking



Process	Steps	What you will see!
<p>How to Lock Files using the Submit Locking method.</p>	<p>NOTE: You must be an Editor or Higher to Lock Files</p> <p>Log in as an Editor or Higher</p> <ul style="list-style-type: none"> • If the To Do Button is displayed below the Edit Pull Down Menu instead of the Work Area Button after logging in, click it Once. The To Do Button has a Document with a Check Mark in the Center. <p>NOTE: Make sure you are in your Work Area by clicking the Work Area Button</p> <ul style="list-style-type: none"> • Click the Directory where the File is located that you want to Lock • Click the Checkbox next to the File/s you want to Lock • Click the Edit Pull Down Menu • Click Lock • Type any comments you have in the Comments Field <p>NOTE: The Lock Function will automatically compare the version in the Work Area and the version in the Staging Area (if there is a version in the Staging Area) and take the most recent.</p> <ul style="list-style-type: none"> • If you want to keep the version in your Work Area, whether or not it is newer, Deselect the Get Latest Checkbox • Click the Lock Button. 	<ul style="list-style-type: none"> • The Work Area Button should be visible, the Work Area Button has a Folder with a Pencil in the center and is located directly below the Edit Pull Down Menu. • An Enter Lock Comments Window will appear. • TeamSite will lock the File(s)



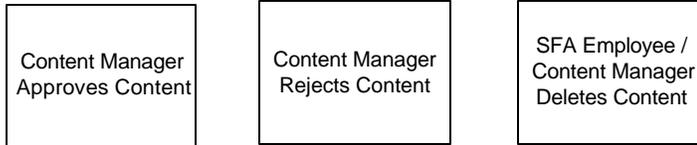
Unlocking Files



Process	Steps	What you will see!
<p>How to Unlock Files.</p>	<p>NOTE: You must be an Editor or Higher to Unlock Files</p> <p>Log in as an Editor or Higher</p> <ul style="list-style-type: none"> • If the To Do Button is displayed below the Edit Pull Down Menu instead of the Work Area Button after logging in, click it Once. The To Do Button has a Document with a Check Mark in the Center. <p>NOTE: Make sure you are in your Work Area by clicking the Work Area Button</p> <ul style="list-style-type: none"> • Click the Directory where the File is located that you want to Unlock • Click the Checkbox next to the File/s you want to Unlock • Click the Edit Pull Down Menu • Click Unlock 	<ul style="list-style-type: none"> • The Work Area Button should be visible; the Work Area Button has a Folder with a Pencil in the center and is located directly below the Edit Pull Down Menu. • The File/s are Unlocked



Approving / Rejecting and Deleting Content

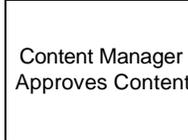


This section covers the procedures for the Content Manager to Approve or Reject the Author's Task. This section will also show how to delete content and describe how the Content Manager will provide comments to the Author.





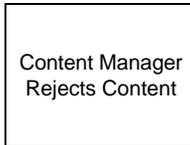
Approving Content



Process	Steps	What you will see!
<p>The Content Manager or designee approves Content.</p>	<p>Log in as an Editor or Higher</p> <ul style="list-style-type: none"> • Click To Do Button if the Tasks are not displayed • Click the Task Options Pull Down Menu • Click Approve • Type your comments in the Transition Comment Field • Click the Transition to Next Task Button <p>SPECIAL NOTE: After clicking the Transition to Next Task Button, the Task is Automatically Deployed to the Staging Area</p>	<ul style="list-style-type: none"> • A Task Transition Window will be displayed



Rejecting Content



Process	Steps	What you will see!
<p>The Content Manager or designee Rejects Content.</p>	<p>Log on as an Editor or Higher</p> <ul style="list-style-type: none"> • Click the To Do Button if the Tasks are not displayed • Click the Task Options Pull Down Menu • Click Reject • Type your comments in the Transition Comment Field • Click the Transition to Next Task Button <p>NOTE: After the Editor or Higher Rejects the Job, the Author can log on and view the comments to see the reason for rejection and further instructions to complete the Task. See Table 4.6 for viewing comments.</p>	<ul style="list-style-type: none"> • A Task Transition Window will be displayed



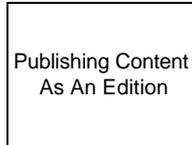
Deleting Content

SFA Employee
 Deletes Content

Process	Steps	What you will see!
<p>SFA employee Deletes Content.</p>	<p>Log on as an Author or Higher</p> <ul style="list-style-type: none"> • Click the Work Area Button if the To Do Button is not displayed • Click on the Directory where the File is located • Click the Checkbox next to the File/s you want to delete in your Work Area • Click the File Pull Down Menu • Click Delete <ul style="list-style-type: none"> • Click the OK Button if you want to Delete the File <p>NOTE: The list of Files in your Work Area will be updated to reflect the deletions. If the Files are not updated, click the TeamSite Refresh Button that is located below the File Pull Down Menu.</p>	<ul style="list-style-type: none"> • A Window will appear asking you to Delete Selected File, Are You Sure?



Publishing Content

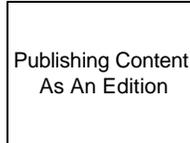


This section covers how to Publish Content as an Edition. This is the last step that is performed before the Edition is deployed to the Production Server.





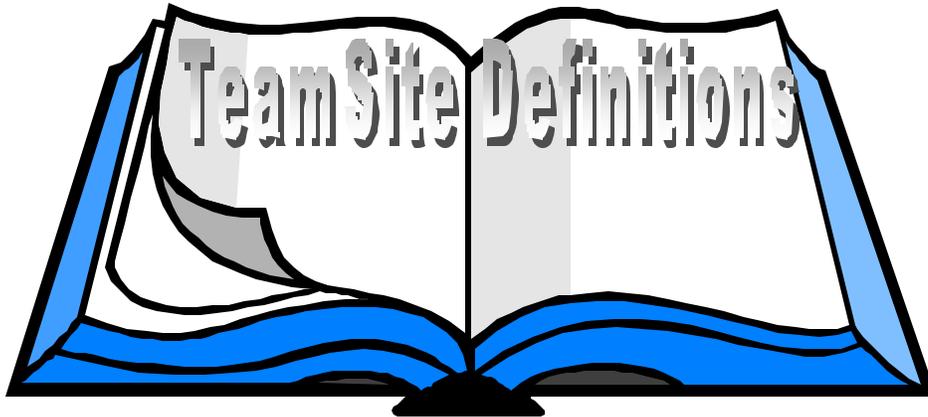
Publishing Content as an Edition



Process	Steps	What you will see!
<p>Content Manager or their designee will Publish Content as an Edition.</p>	<p>NOTE: As noted in Table 4.1, after Approving a Job and clicking the Transition to Next Task Button, the Task is Automatically Deployed to the Staging Area.</p> <ol style="list-style-type: none"> 1. Log in as an Editor or Higher 2. Go to the Staging Area <ul style="list-style-type: none"> • Click the box next to the document you want to Publish • Click the File Pull Down Menu • Click Publish • Type the Name of the Edition you want in the Name Field • Type any comments you have in the Comments Field • Click the OK Button 	<ul style="list-style-type: none"> • A Window will be displayed on the right side of the screen with the fields Name and Comment • Your Content is now Published as an Edition and ready for Deployment to the Production Server



3.0 TeamSite Definitions





Administrator - The Administrators own the major branches in TeamSite. They create and maintain the major branches, sub-branches and work areas. They can also perform all the same functions as Authors and Editors.

Author - Authors are the primary content creators and maintainers. They can receive assignments from Editors, which are displayed in Task lists when Authors log in to TeamSite. In order to test and QA their work, Authors have full access to the content in their Editors' work areas. More than one author can belong to an Editor's work area.

Branch - a path of development for a body of content developed and maintained by a team. Each branch contains one or more work areas, a staging area, and a published edition and may contain sub-branches and previous editions.

Comment - A note attached to a file, directory, work area, branch, edition, job, or task. Comments can be attached to work areas, 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 TeamSite objects. Objects that can be compared include work areas, staging areas, or editions.

Conflict - Occurs when multiple users make changes to the same file in multiple locations, e.g. when a file had been changed in two different work areas.

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 TeamSite that creates or modifies content for the website. "Contributor" is a generic term that does not designate any specific TeamSite 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 websites. Editions also serve as rollback points for projects in development, and they provide back archives of the website.

Editor - Editors own work areas within their channel's sub-branch. They can create and edit content, just as Authors do, but they are primarily responsible for managing the development taking place within their work areas. Editors are generally "managerial" users, who primarily supervise the work of Authors, or self-managing "power" users, who need additional functionality to manage their own content.

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 TeamSite system. By default, an Author's Home Page will display his / her Task list. An Editor's or Administrator's Home Page will display an overview of the TeamSite 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 work areas 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 work area is compared with the version in the staging area and the latest is taken. TeamSite 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. Submit Locking is the only available locking model for SFA unless the Administrator changes this locking model.

Main Branch - The first branch created when TeamSite is installed. The Master owns the main branch. All branches in the TeamSite system are subordinate to the main branch.

Master - The owner of the main branch. The Master user's is responsible for the entire Web site. The Master organizes the structure of the TeamSite 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 TeamSite's Advanced File Merging.

Navigation Window - The left-hand side of the TeamSite window, which allows you to navigate through TeamSite by clicking on the underlined names of branches, work areas, staging areas, editions, or directories.

Open Deploy - Allows the transfer of website content from the development server to the production server.

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 website. Because TeamSite editions are complete copies of the entire website at the time of publication, they can be referenced to revert to prior versions of files, directories, or the entire website.

SmartContext - The use of individual work areas and staging areas to allow user's to test their work in the context of the entire website without actually deploying the website. 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 website. This provides a simple, intuitive way of finding the file your want to edit, editing it in context and see your changes immediately.

Staging Area - The area where users integrate the contents of work areas. User's submit read-only copies of files from their work areas to the staging area to integrate with other contributions, and test the integrity of the resulting entire website.

Submit - The act of transferring website content form a work area to the staging area.

Task - A unit of work performed by a single user or process. Each task in a job is associated with a particular TeamSite work area and carries a set of files with it.

TeamSite Templating - A TeamSite module that allows you to configure the look and feel of your Web pages.

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 TeamSite system. The To Do List shows the user which tasks and jobs he / she is responsible for, and allows the user to do the necessary work to complete the tasks.

User - A TeamSite Author, Editor, Administrator, or Master.

Work Area - a virtual copy of a website, which may be worked on independently without affecting the actual site or the work of other contributors.

Workflow - A system for defining the necessary processes for content creation and approval.

Work Window - The right-hand side of the TeamSite screen, which allows you to navigate and manipulate files within TeamSite.