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

October 2000

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 IFAP and Schools Portal 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 Schools Portal and Information for Financial Aid Professionals (IFAP) are in the form of news updates, headlines, calendar events, publications, policies and procedures. The Content Shop (Schools Channel Customer Service Call Center) will utilize the content management software (Interwoven's TeamSite) and content development tools (such as Dreamweaver, Word, etc.) to create, manage, and deliver the content from the business unit to the content shop to publication on the server.

IFAP web content is primarily static content containing text files and graphics. IFAP content includes SFA headlines and publications.

The Schools Portal web content is primarily static content containing text files and graphics. Content on the Schools Portal includes SFA headlines, a calendar of events, and links to several SFA websites.

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 IFAP and the Schools Portal. 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.

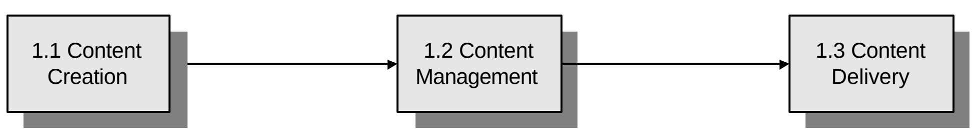


Figure 1 – High Level (Tier 1) Web Content Management Architecture

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 either IFAP or the Schools Portal. These processes will be used on a daily basis by 'designated' IFAP and Schools Portal Content Managers and the Schools Channel Customer Service Call Center.

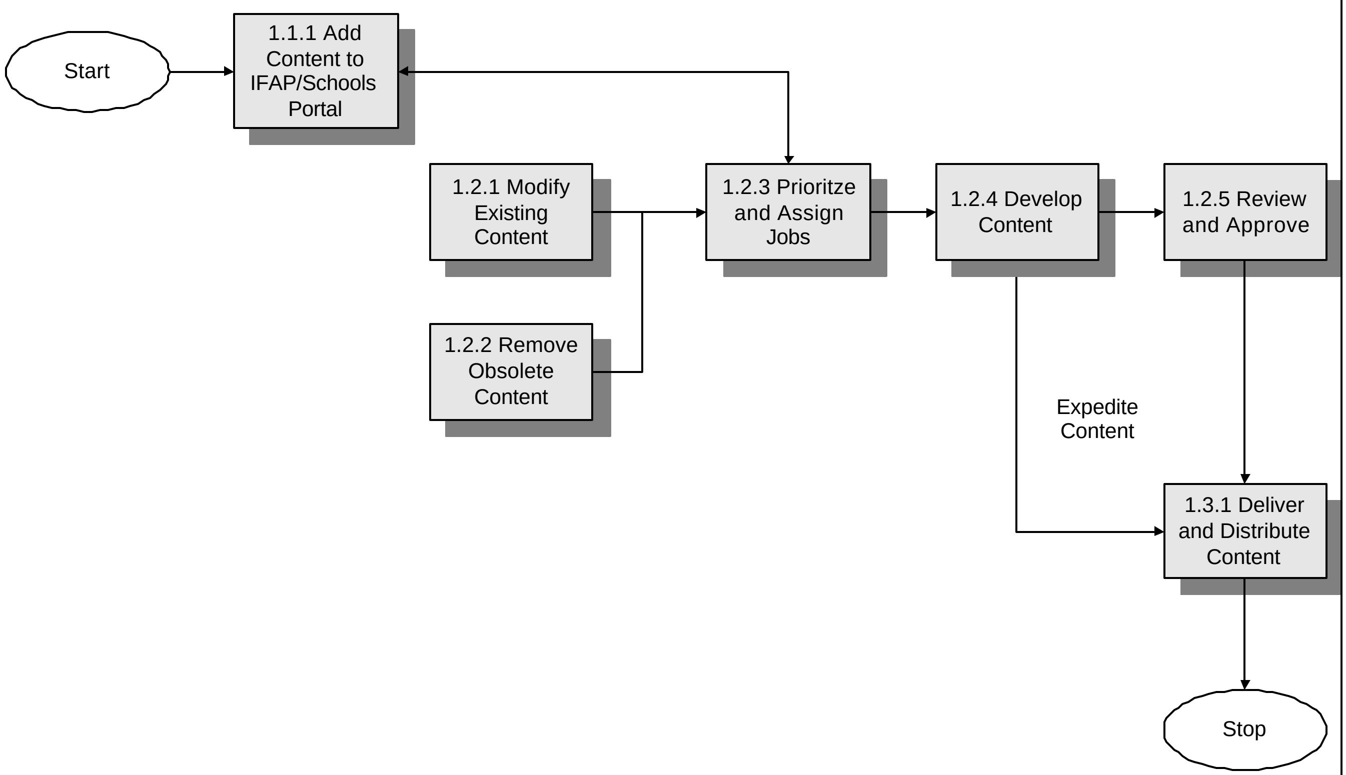


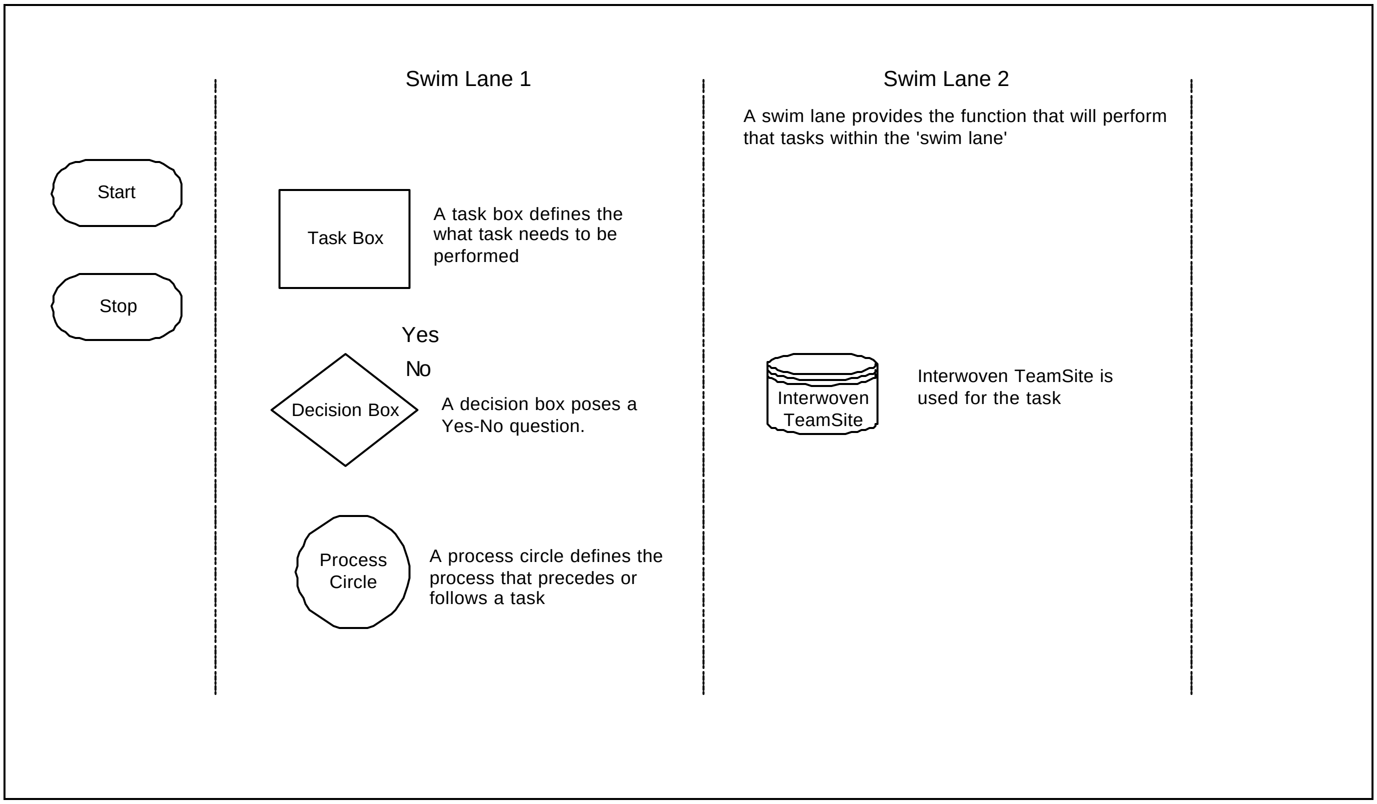
Figure 2 – Detailed (Tier 2) Web Content Management Architecture

Ref. #	Process Description	Responsibility/ Process Owner	Tools	Outcomes
1.1.	**Content Creation** – This process defines the actions to be undertaken by the designated IFAP and Schools Portal Content Managers within the SFA business units. Ideas are formulated within the business units by 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 send an email request to the Schools Channel Customer Service Call Center. The Content Manager provides a description of the work to be done and attaches any necessary files to the email.	Designated IFAP and Schools Portal Content Managers within the SFA business units	Content creation tools such as Word, Excel, PowerPoint and HTML editor tools and Interwoven TeamSite	Content idea formulated, documented and forwarded via email to the Schools Customer Service Call Center
1.2	**Content Management** – This process defines the actions to manage content once it has been received by the Schools Channel Customer Service Call Center. The Schools Channel Customer Service Call Center IFAP / Portal Lead reviews the email request, creates a job in Interwoven, and assigns the job to a staff person. A workarea for the job is also selected. The Schools Channel Customer Service Call Center staff view the assigned job and develop the content via an Interwoven template. Once the content is created, a different member of the Schools Channel Customer Service Call Center will perform a quality review of the content and approve the content. The review also ensures that it conforms to SFA style guide, usability, and accessibility guidelines. The content is then deployed to the staging area within Interwoven where it is ready for deployment to the IFAP and / or Schools Portal web server and database.	Schools Channel Customer Service Call Center IFAP / Portal Lead and staff	Interwoven TeamSite	Content is prioritized and jobs are created within Interwoven. Jobs are assigned and content is created via Interwoven templates. A quality review is performed; content is approved and submitted to the staging area within Interwoven.

Ref. #	Process Description	Responsibility/ Process Owner	Tools	Outcomes
1.3	**Content Delivery –** This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP / Portal Lead with support from the IFAP / Schools Portal Applications Management team and Virtual Data Center (VDC). The Schools Channel Customer Service Call Center IFAP / Portal Lead conducts a final review of the entire site (within the staging area) prior to publishing a new edition of IFAP or the Schools Portal. Then, the Schools Customer Service Call Center IFAP / Portal Lead deploys the new edition to the production server and related database.	Schools Customer Service Call Center IFAP / Portal Lead, IFAP / Portal Applications Management team, and Virtual Data Center	Interwoven TeamSite, Open Deploy and Data Deploy.	New edition of IFAP and / or Schools Portal deployed to the production server and database

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.



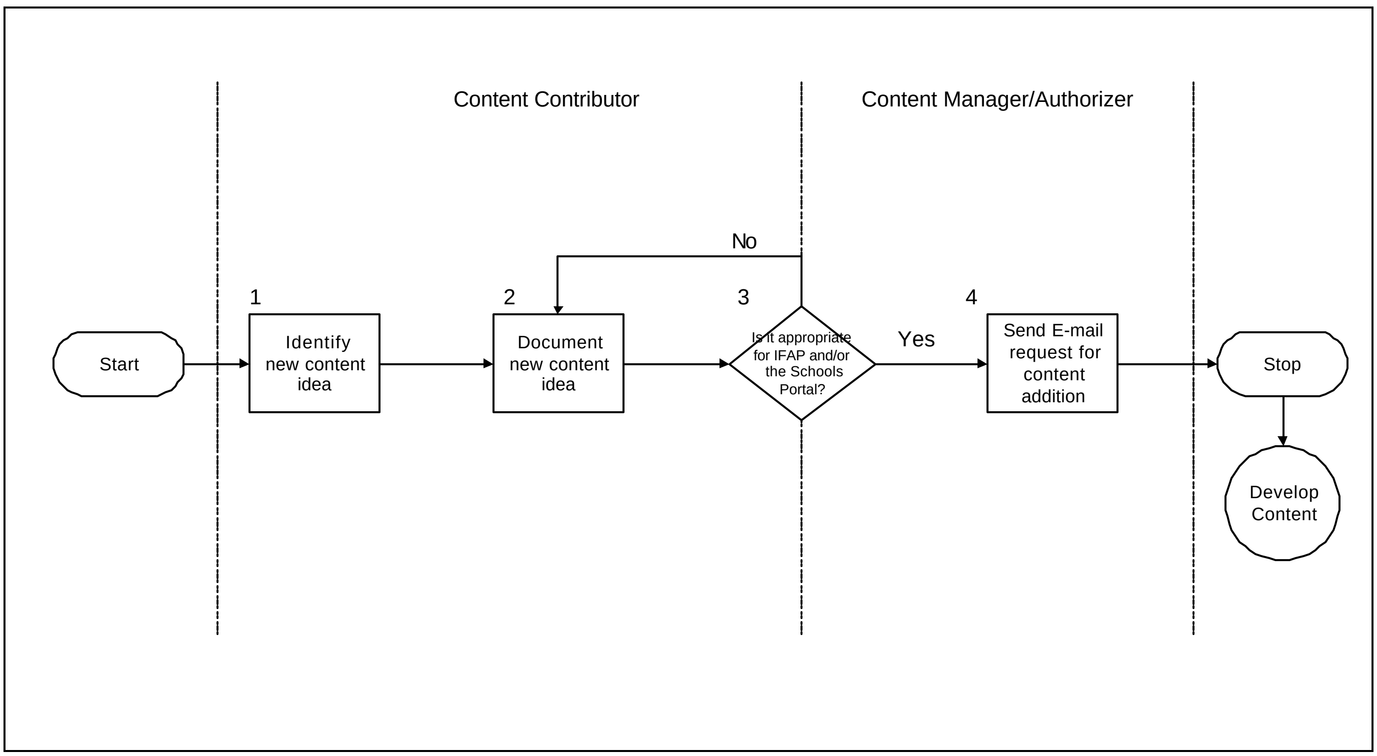
1.1 Content Creation Process

The content creation process defines the actions to be undertaken by the designated IFAP and Schools Portal Content Managers within the SFA business units. Ideas are formulated within the business units by 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 send an email request to the Schools Channel Customer Service Call Center. The Content Manager provides a description of the work to be done and attaches any necessary files to the email.

1.1.1 Add Content to IFAP/Schools Portal

This process defines the actions to be undertaken by Content Contributors and Content Managers. Authorizers within the business unit request the addition of new content to IFAP and/or the Schools Portal. This process is used for NEW content that is being added to IFAP and/or the Schools Portal for the FIRST time.

1.1.1 Add Content to IFAP/Schools Portal Process Workflow



1.1.1 Add Content to IFAP/Schools Portal 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 IFAP and/or the Schools Portal.	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 IFAP and/or the Schools Portal? – 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/ Authorizer	N/A	Content idea reviewed and approved

4.	Send an E-mail Request for Content Addition – The Content Manager within each channel who is responsible for pushing all new content to the content shop sends an E-mail request with a description of the work to be done and attaches any necessary files. This request is sent to the Schools Channel Customer Service Call Center.	Content Manager/ Authorizer	SFA email	E-mail request submitted to Schools Channel Customer Service Call Center
Stop				

1.2 Content Management Processes

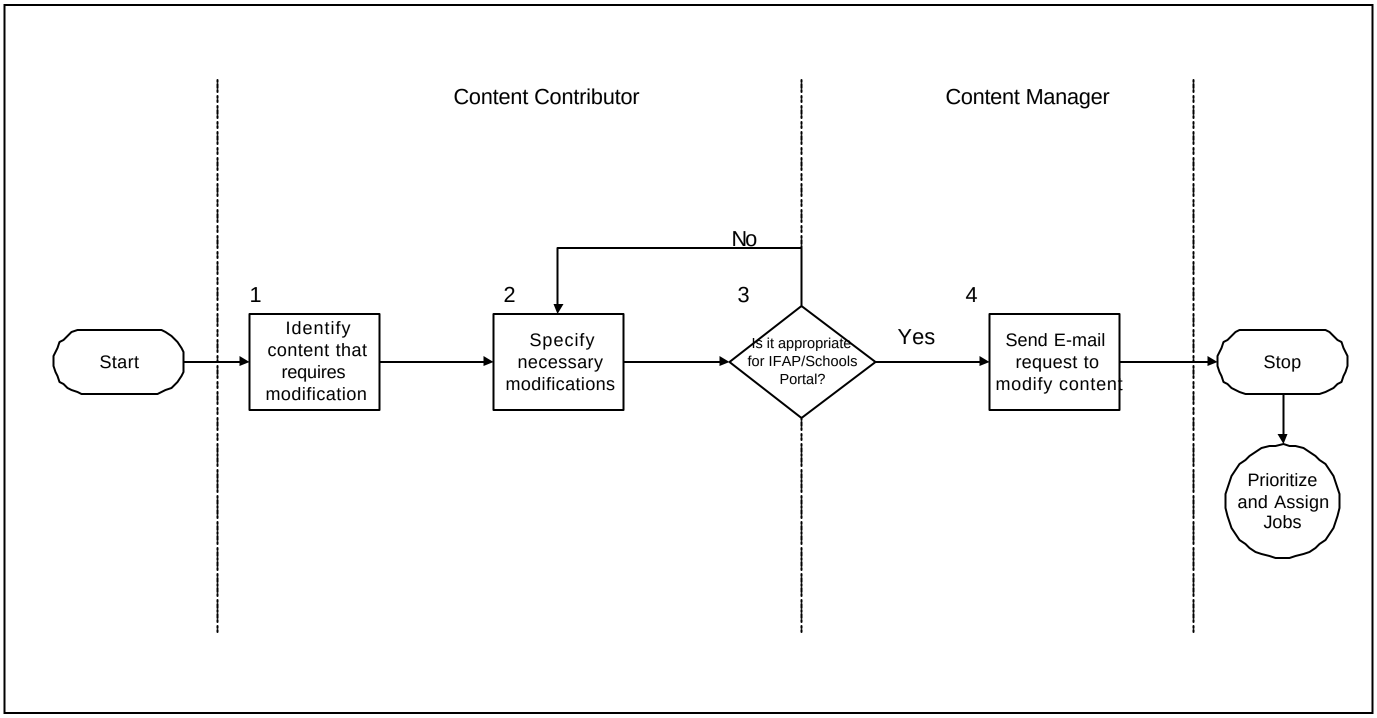
This process defines the actions to manage content once it has been received by the Schools Channel Customer Service Call Center. The Schools Channel Customer Service Call Center IFAP / Portal Lead reviews the E-mail request, creates a job in Interwoven, and assigns the job to a staff person. A workarea for the job is also selected. The Schools Channel Customer Service Call Center staff view the assigned job and develop the content via an Interwoven template. Once the content is created, a different member of the Schools Channel Customer Service Call Center will perform a quality review of the content and approve the content. The review also ensures that it conforms to SFA style guide, usability and accessibility guidelines. The content is then migrated to the staging area within Interwoven where it is ready for deployment to the IFAP and / or Schools Portal web server.

Content management processes include modify existing content on IFAP / Schools Portal, remove obsolete content from IFAP / Schools Portal, prioritize and assign jobs, develop content for IFAP / Schools Portal, and review and approve content.

1.2.1 Modify Existing Content on IFAP/Schools Portal

This process defines the actions to be undertaken by Content Contributors and Content Managers / Authorizers to modify existing IFAP and / or Schools Portal content.

1.2.1 Modify Existing Content on IFAP/Schools Portal Process Workflow



1.2.1 Modify Existing Content on IFAP/Schools Portal Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Identify Content That Requires Modification – The Content Contributor periodically reviews his/her content on IFAP/Schools Portal to determine if content is inaccurate or outdated. The Content Contributor identifies information that requires modifications.	Content Contributor within an SFA business unit	N/A	IFAP/Schools Portal content that requires modification identified
2.	Specify necessary modifications – The Content Contributor modifies the existing IFAP/Schools Portal 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	Specific modifications documented

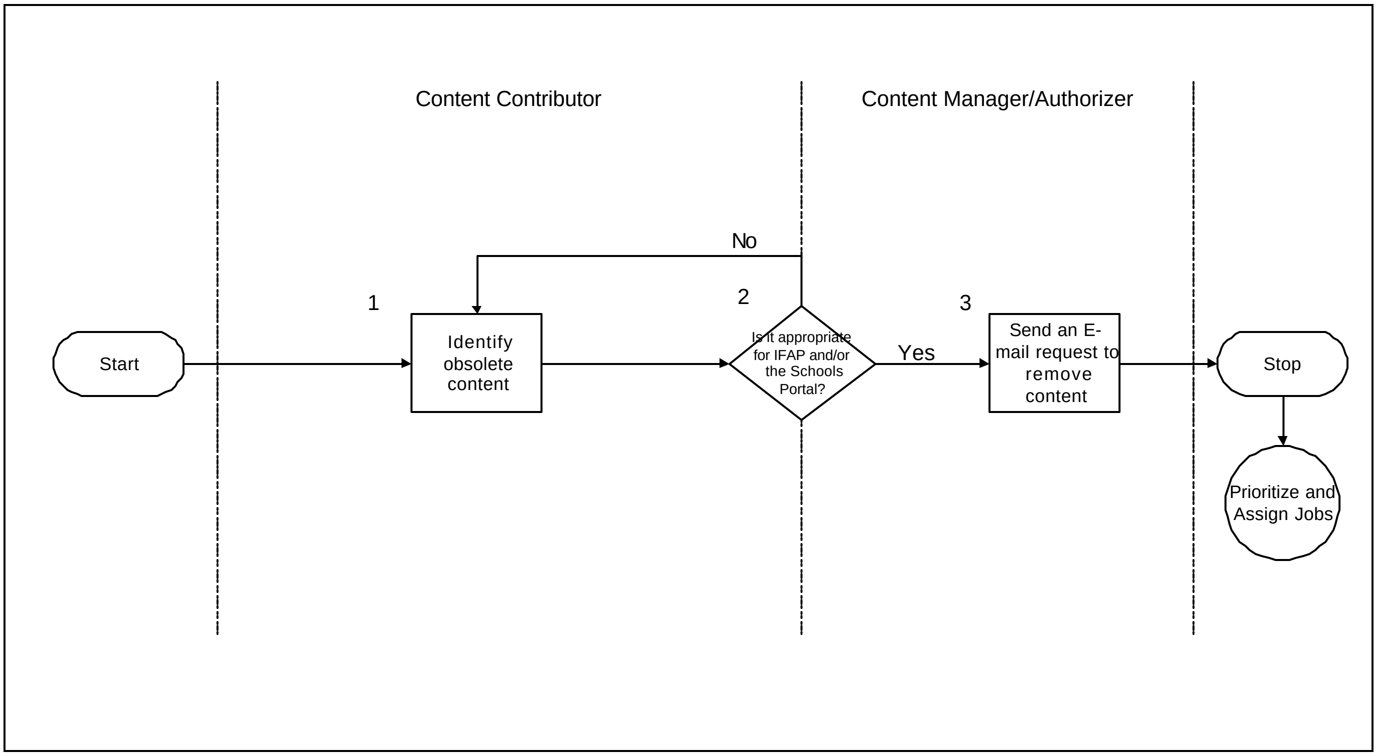
3.	Is it Appropriate for IFAP/Schools Portal? – This is a check point to make sure that this is the right information going to the right audience at the right time. Grammar, spelling and accuracy are also checked at this point.
	
	If (Yes) – The process continues on with step 4.
	If (No) – The Content Manager communicates the required changes and the process goes back to step 2
		Content Manager/ Authorizer	N/A	Modified content reviewed and approved

4.	Send an E-mail Request for Content Modification – The Content Manager within each channel sends an E-mail request with a description of the work to be modified and attaches any necessary files. This request is sent to the Schools Channel Customer Service Call Center.	Content Manager/ Authorizer		E-mail request submitted to Schools Channel Customer Service Call Center
Stop				

1.2.2 Remove Obsolete Content From IFAP/Schools Portal

This process defines the actions to be undertaken by Content Contributors and Content Managers / Authorizers to remove obsolete content from IFAP and or the Schools Portal.

1.2.2 Remove Obsolete Content From IFAP/Schools Portal Process Workflow



1.2.2 Remove Obsolete Content From IFAP/Schools Portal 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 IFAP and / or the Schools Portal. This is documented and forwarded to the Content Manager.	Content Contributor within an SFA business unit	N / A	Obsolete content identified

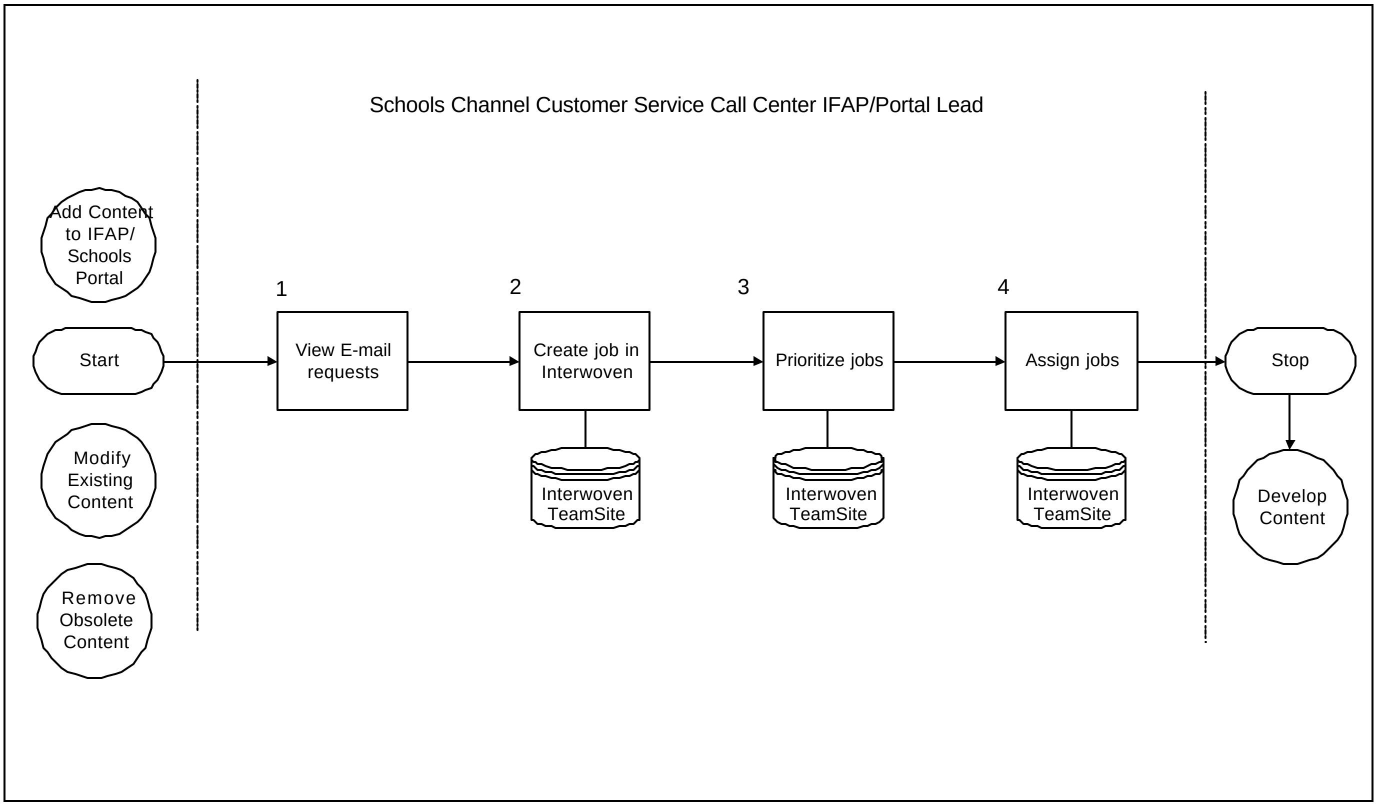
2.	Is it Appropriate for IFAP / Schools Portal? – This is a check point to make sure that the information should truly be removed from IFAP and / or the Schools Portal.
	
	If (Yes) – The process continues on with step 3.
	If (No) – The Content Manager communicates to the Content Contributor the reason for rejecting the removal request.
		Content Manager / Authorizer	N / A	Review of content to be removed completed.

3.	Send an E-mail Request to Remove Content – The Content Manager within each channel sends an email request with a description of the work to be removed. This request is sent to the Schools Channel Customer Service Call Center.	Content Manager / Authorizer		E-mail request submitted to Schools Channel Customer Service Call Center
Stop				

1.2.3 Prioritize and Assign Jobs

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP / Portal Lead to receive E-mail requests from Content Managers / Authorizers, prioritize these requests and assign the requests to the Schools Channel Customer Service Call Center staff.

1.2.3 Prioritize and Assign Jobs Process Workflow



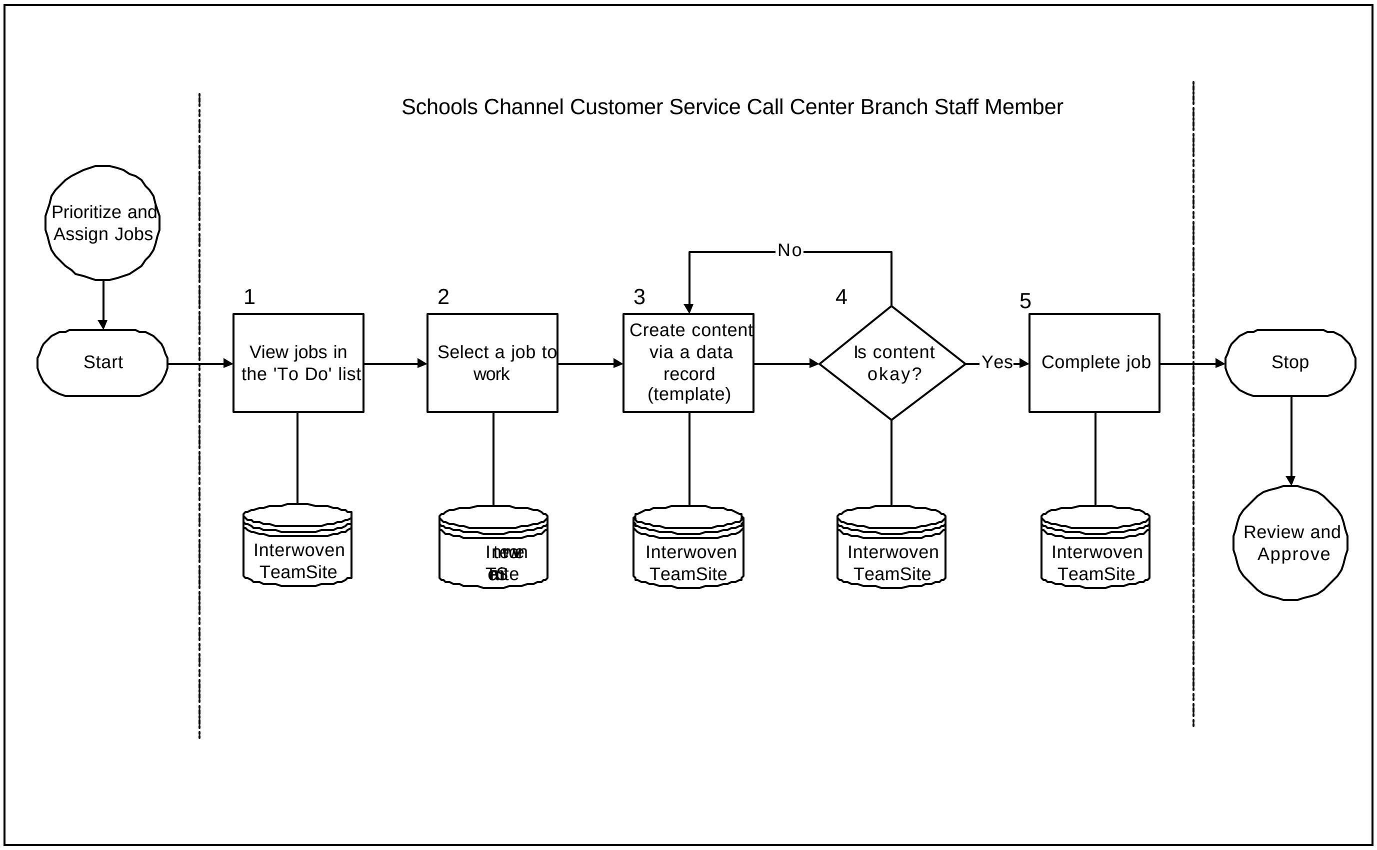
1.2.3 Prioritize and Assign Jobs Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	View E-mail requests – The Schools Channel Customer Service Call Center IFAP / Portal Lead reviews E-mail requests from Content Managers.	Schools Channel Customer Service Call Center IFAP / Portal Lead	SFA E-mail	E-mail requests reviewed
2.	Create Jobs in Interwoven – The Schools Channel Customer Service Call Center IFAP / Portal Lead logs onto Interwoven TeamSite and creates a job for the request. A workarea is selected for the job based on the estimated time to complete the job (short, standard, and long).	Schools Channel Customer Service Call Center IFAP / Portal Lead	Interwoven TeamSite	Interwoven job created
3.	Prioritize the job – The Schools Channel Customer Service Call Center IFAP / Portal Lead identifies the priority for the job in the Comments.	Schools Channel Customer Service Call Center IFAP / Portal Lead	Interwoven TeamSite	Job prioritized
4.	Assign the job - The Schools Channel Customer Service Call Center IFAP / Portal Lead assigns the job to a Schools Channel Customer Service Call Center staff member.	Schools Channel Customer Service Call Center IFAP / Portal Lead	Interwoven TeamSite	Job assigned to staff member
Stop				

1.2.4 Develop Content

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center staff to develop content.

1.2.4 Develop Content Process Workflow



1.2.4 Develop Content Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	View Jobs in the 'To Do' List – The Schools Channel Customer Service Call Center staff member reviews jobs in his / her 'To Do' list.	Schools Channel Customer Service Call Center Staff	Interwoven TeamSite	'To Do' list reviewed
2.	Select a Job to Work – The Schools Channel Customer Service Call Center staff member selects a job to work based on priority entered by the IFAP / Portal Lead in the Comments.	Schools Channel Customer Service Call Center Staff	Interwoven TeamSite	Job selected
3.	Create Content Via a New Data Record (Template) - The Schools Channel Customer Service Call Center staff member enters the content provided in the appropriate template and saves this record.	Schools Channel Customer Service Call Center Staff	Interwoven TeamSite	Content created

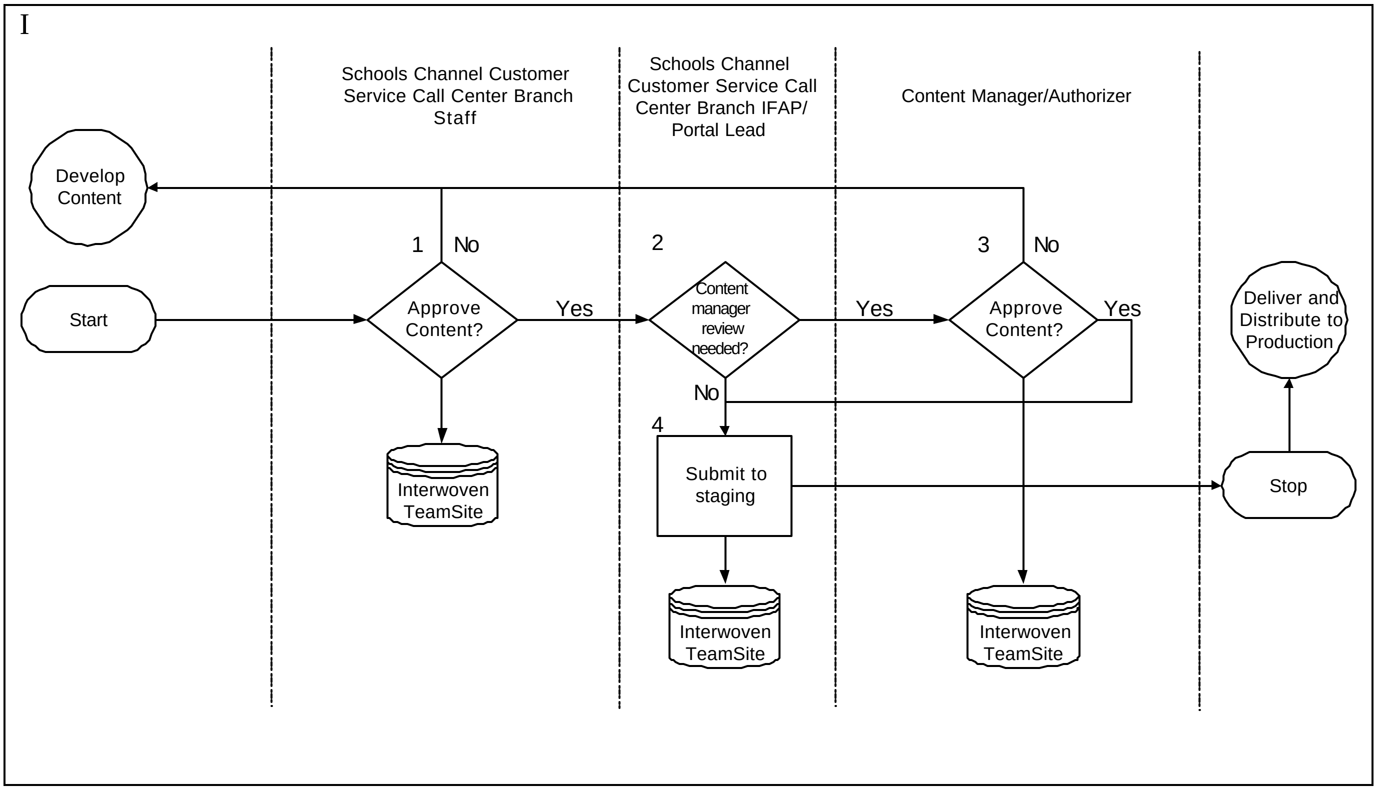
4.	Is Content Okay? - The Schools Channel Customer Service Call Center staff member previews the content and reviews it to ensure that it is accurate (grammar, spelling and content) and the presentation is correct.
	
	If (Yes) – The process continues on with step 5
	If (No) The process reverts back to step 3 and the appropriate changes are made
		Schools Channel Customer Service Call Center Staff	Interwoven TeamSite	Content reviewed

5.	Complete Job - The Schools Channel Customer Service Call Center staff member indicates the job is done and provides any necessary comments.	Schools Channel Customer Service Call Center Staff	Interwoven TeamSite	Job completed
Stop				

1.2.5 Review and Approve Content

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP / Portal Lead to review and approve content and submit content to staging.

1.2.5 Review and Approve Process Workflow



1.2.5 Review and Approve Content Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				

1.	Approve Content? – The content is assigned to the Schools Channel Customer Service Call Center staff for review to determine if it is consistent with SFA design standards and accessibility guidelines.
	
	If (Yes) – The process continues on with step 2.
	If (No) – The Schools Channel Customer Service Call Center IFAP / Portal Lead communicates needed changes and the process goes back to the Develop Content process.
		Schools Channel Customer Service Call Center staff	Interwoven TeamSite	Content reviewed

2.	Content Manager Review Needed? – Based on the type and importance of content, the Schools Channel Customer Service Call Center IFAP / Portal Lead will determine if the content needs to be reviewed and approved by the Content Manager who submitted the content.
	
	If (Yes) – The process continues on with step 3.
	If (No) – The process skips step 3 and proceeds to step 4.
		Schools Channel Customer Service Call Center IFAP / Portal Lead	Interwoven TeamSite	Decision regarding whether the Content Manager needs to approve the content

3.	Approve Content? – The content is reviewed by the Content Manager / Authorizer to determine if the content should be authorized for production.
	
	If (Yes) – The process continues on with step 4.
	If (No) – The Content Manager / Authorizer communicates needed changes and the process goes back to the Develop Content process.
		Content Manager / Authorizer	Interwoven TeamSite	Content reviewed and approved by Content Manager

Step #	Step Description	Responsibility	Tools	Outcomes
4.	Submit to Staging – The Schools Channel Customer Service Call Center IFAP / Portal Lead submits the content to the TeamSite staging area where the entire site resides as a read-only copy.	Schools Channel Customer Service Call Center Staff IFAP / Portal Lead	Interwoven TeamSite	Content submitted to staging
Stop				

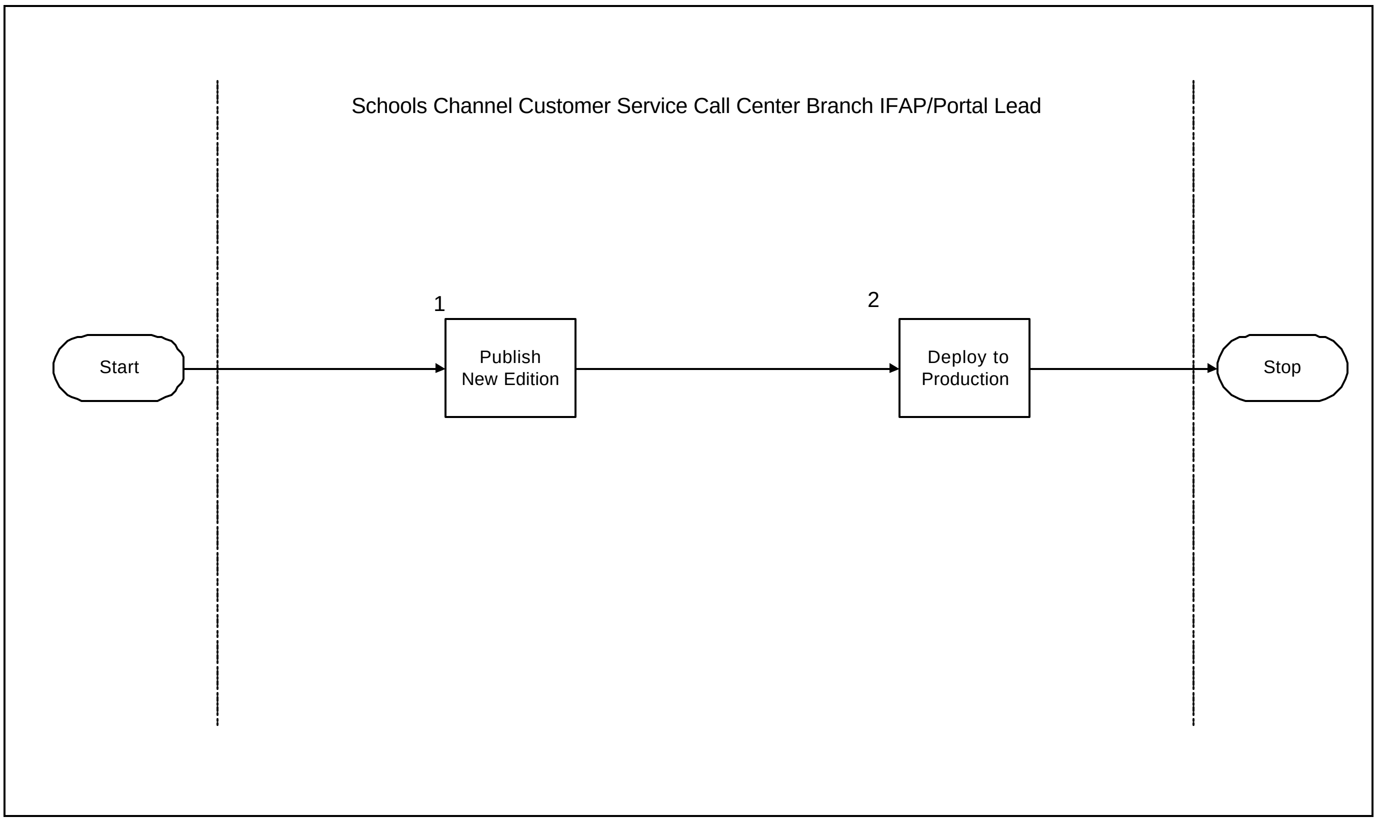
1.3 Content Delivery Processes

The content delivery process defines the actions to be undertaken by the Schools Channel Customer Service Call Center with support from the IFAP / Portals Applications Management team and the Virtual Data Center. The Schools Channel Customer Service Call Center IFAP / Portal Lead publishes a new edition of IFAP and / or the Schools Portal. Then, the Schools Channel Customer Service Call Center IFAP / Portal Lead works with IFAP / Portals Applications Management team and the Virtual Data Center to deploy the site to the production server using Interwoven Open Deploy and to the production database using Data Deploy.

1.3.1 Deliver and Distribute to Production

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP / Portal Lead to deliver and distribute new editions of IFAP and / or the Schools Portal to production. Users can view the new content.

1.3.1 Deliver and Distribute to Production Process Workflow

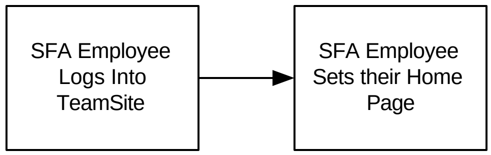


1.3.1 Deliver and Distribute to Production Process Workflow Description

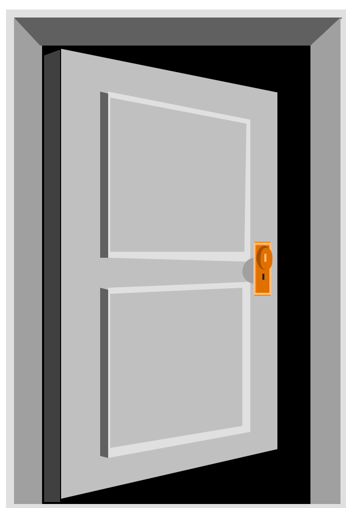
Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Publish New Edition – After the content has been submitted to staging, the Schools Channel Customer Service Call Center IFAP/Portal Lead publishes a new edition of IFAP and/or the Schools Portal.	Schools Channel Customer Service Call Center IFAP/Portal Lead	Interwoven TeamSite	New edition of IFAP and/or the Schools Portal created
2.	Deploy to Production – The new edition of IFAP and/or the Schools Portal is deployed to the production server using Interwoven Open Deploy and production database using Data Deploy. This can be a manual or automated process.	Schools Channel Customer Service Call Center IFAP/Portal Lead	Interwoven Open Deploy and Data Deploy	New edition of IFAP and/or the Schools Portal deployed to the production server and database. Available for viewing by users
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

SFA Employee Logs 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.**

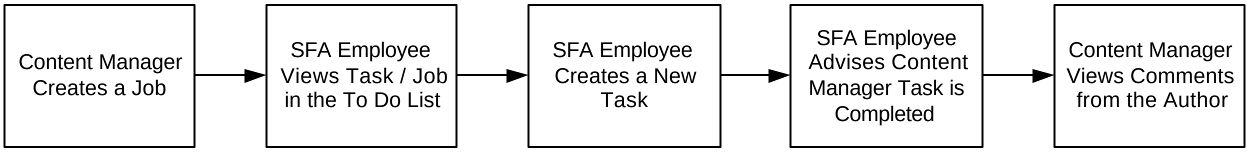
Process	Steps
SFA employee Logs into TeamSite for Content Management Tasks.	• Click your **TeamSite/Browser** Icon from your desktop • From the **Login as Pull Down Menu;** select your user type (i.e. author, editor, or administrator) • Enter your **Username** in the **User Name Field** • Enter your **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.	**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. • 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

Content Manager Creates a Job

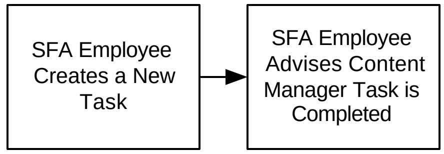
Process	Steps	What you will see!
Content Manager Creates a Job for the SFA Employee.	**1. Log in** as an **Editor or Higher**. • If the **To Do Button** is displayed below the **Edit Pull Down Menu**, after logging in instead of the **Work Area Button**, Click it **Once**. The **To Do Button** has a **Document** with a **Check Mark** in the center.	• 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.**
	2. Create the New Task • Click the **File Pull Down Menu** • Click **New Job**	• A **New Job Window** will appear asking you to select the **Workflow Template** you want to base the job on
	• 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**	• A **New Job Template Window** will appear with different **Pull** Down Menus **and** Fields
	• 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**	• 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!
SFA employee views their Task(s)/ Job in the To Do list.	**1.** Log in as an **Author** and view your environment • 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 • 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**	• 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**.

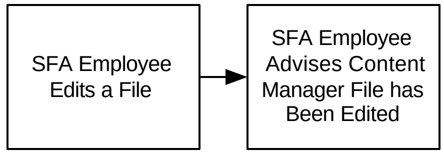
Creating a New Task



Process	Steps	What you will see!
SFA employee creates a new task based on the Content Managers request.	**1. Log in** as an **Author** and set up your environment • 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) **2. Add the New File** • 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.) **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**. • 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”, **3. Type** your information in the document **4. Save and Close** the document.	• 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!
	(You don't have to identify where the document will be saved, TeamSite will perform this function in the following steps.) • 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 been modified) • 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**	• Another TeamSite **LaunchPad Window** will be displayed saying; Remove the Temporary Local Copies After Uploading. • Closes the **Task Details Window**
SFA Employee advises the Content Manager or Editor that the Task has been completed.	**Mark the Task Complete** • 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**	• A TeamSite **Task Transition Window** will be displayed

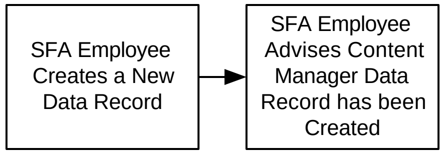
Editing Files



Process	Steps	What you will see!
SFA employee edits content file	**1.** Log in as an **Author** • (If the Tasks / Jobs that are assigned to you are not visible, click the **To Do Button**. The **To Do Button** has document with a **Check Mark in the Center** and is **Directly Below the Edit Pull Down Menu**.) **2. Open the Task you want to Edit** • Click the **Task Options Pull Down Menu** • Click **Edit Task** • Click the **File Options Pull Down Menu** • Click **Edit File/Data Record** • Maximize the **TeamSite LaunchPad Window** if it is minimized • Click the **File** you want to **Edit** • Click the **Edit Button at the Bottom** of the **TeamSite LaunchPad Window** • If a Window appears asking; Do you want to revert to the saved File? Click the **Yes Button** **NOTE:** Which ever File Name Extension is used, the associated application program will be opened (.doc = Word, .xls = Excel, .ppt = PowerPoint). If the TeamSite LaunchPad Window is not displayed, it will be Minimized. **3. Make your changes** to the document. **4. 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) • 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 been modified) • Click **Once** on the document you made changes to. • Click the **Upload Button** • Click the **Remove Button**, this file is not needed. • Close the TeamSite Launch Pad Window • Maximize the **Task Details Window** if it is Minimized.	• Your **Tasks /Jobs** will be visible and the **Work Area Button** will be displayed 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 • The **TeamSite LaunchPad Window** will be displayed with your Document/s • Another **TeamSite LaunchPad Window** will be displayed saying; Remove the Temporary Local Copies After Uploading

Process	Steps	What you will see!
	• Click the **Close Button**	• Closes the **Task File Window**
SFA Employee advises the Content Manager or Editor that the task has been completed.	**Mark the Task Complete** • 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**	• A TeamSite **Task Transition Window** will be displayed • Closes the **Task Transition Window**

Create a New Data Record



Process	Steps	What you will see!
SFA employee completes a New Data Record.	**1.** Log in as an **Author** • 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** • 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 **NOTE:** There are **Four** options at this point (**Save and Preview**, **Save and Exit**, **Save and Generate**, and **Cancel**). **3a.** By clicking **Save and Preview Button**, your **New Data Record** will be saved and displayed by which Template you choose **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**. • Click the **OK Button** on this Window **3c**. By clicking the **Save and Generate Button** • 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**	• 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!
	3d. Click the **Cancel Button** **NOTE:** There are four options at this point (**Back Button Preview Button**, **Generate/Save Button**, and the **Exit Button**). • Click the **Back Button** • Click the **Preview Button** • Click the **Generate/Save Button** • Click the **Exit Button**	• 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
SFA Employee advises the Content Manager the New Data Record has been Completed.	**Mark the Task Complete** • 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**	• 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!
The Content Manager views comments from the Author.	**Log on** as an **Editor** or **Higher** • 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	• A **Job Details Window** will be displayed with the Authors Comments

Viewing All Jobs

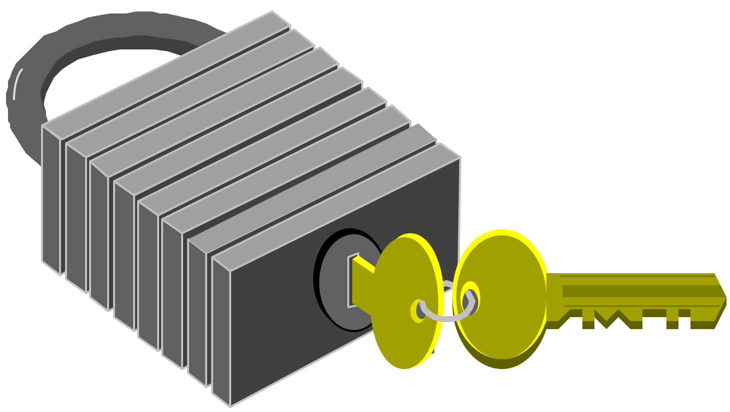
Content Manager Views Available Jobs

Process	Steps	What you will see!
View all available jobs.	**Log on** as an **Author** or **Higher** • Click the **To Do Button** if the Tasks are not displayed	• A list of **All Jobs** will be displayed

Locking and Unlocking Files Using Submit Locking

Locking Files Using Submit Locking	Unlocking Files

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. 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

Locking Files Using Submit Locking

Process	Steps	What you will see!
How to Lock Files using the Submit Locking method.	**NOTE:** You must be an **Editor or Higher** to Lock Files **Log in** as an Editor or Higher • 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**. **NOTE:** Make sure you are in your **Work Area** by clicking the **Work Area Button** • 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** **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. • 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**.	• 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

Unlocking Files

Process	Steps	What you will see!
How to Unlock Files.	**NOTE:** You must be an **Editor or Higher** to Unlock Files **Log in** as an Editor or Higher • 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**. **NOTE:** Make sure you are in your **Work Area** by clicking the **Work Area Button** • 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**	• 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

Content Manager Approves Content	Content Manager Rejects Content	SFA Employee / Content Manager Deletes 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

Content Manager Approves Content

Process	Steps	What you will see!
The Content Manager or designee approves Content.	**Log in** as an **Editor** or **Higher** • 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** **SPECIAL NOTE: After clicking the Transition to Next Task Button, the Task is Automatically Deployed to the Staging Area**	• A **Task Transition Window** will be displayed

Rejecting Content

Content Manager Rejects Content

Process	Steps	What you will see!
The Content Manager or designee Rejects Content.	**Log on** as an **Editor** or **Higher** • 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** **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.	• A **Task Transition Window** will be displayed

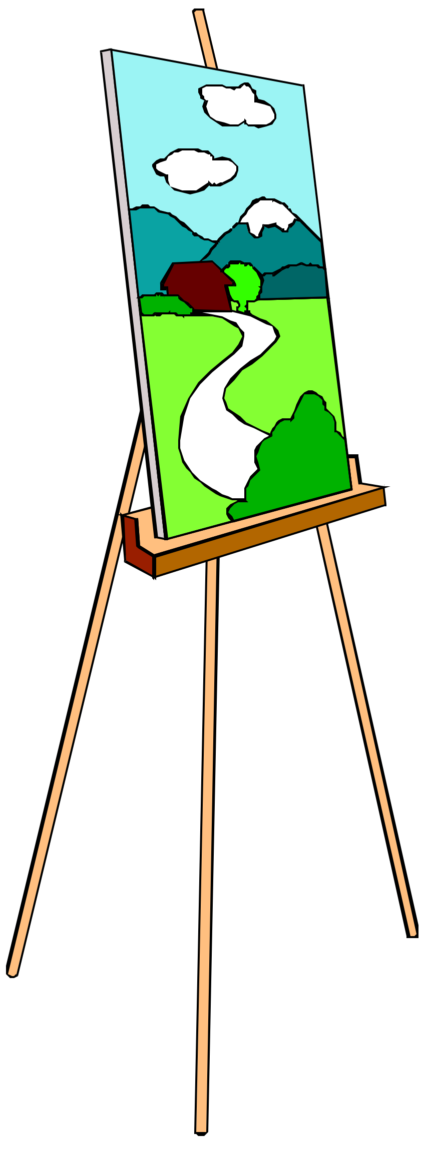
Deleting Content

SFA Employee Deletes Content

Process	Steps	What you will see!
SFA employee Deletes Content.	**Log on** as an **Author** or **Higher** • 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** • Click the **OK Button** if you want to Delete the File **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**.	• 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

Publishing Content As An Edition

Process	Steps	What you will see!
Content Manager or their designee will Publish Content as an Edition.	**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**. **1. Log in** as an **Editor** or **Higher** **2.** Go to the **Staging Area** • 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**	• 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 assess 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.