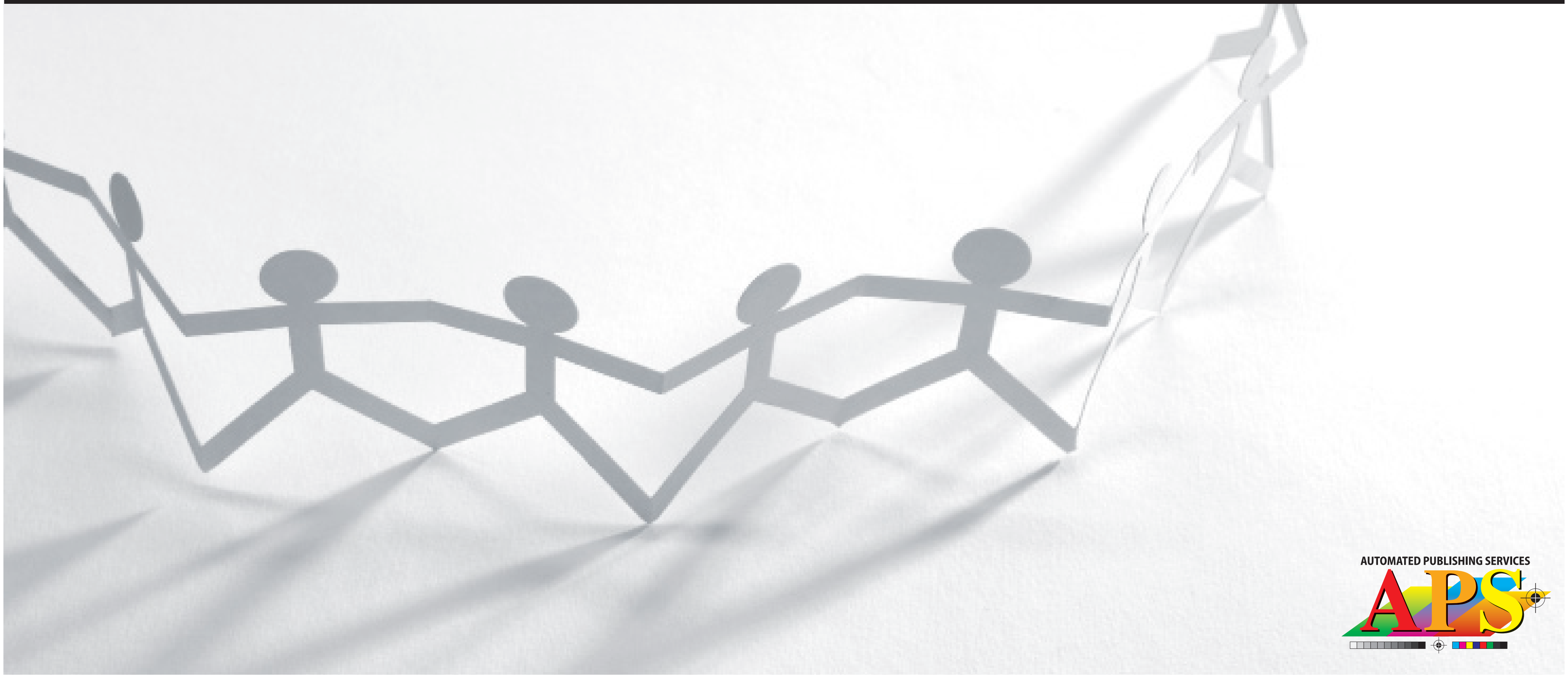
Working with Content Station

Quick Start Guide

WOODWING



AUTOMATED PUBLISHING SERVICES

APS

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Working with Content Station User Guide

1 Introduction

1.1 Overview

Welcome to Content Station, Woodwing's tool that provides for a user friendly interface to your publishing workflow.
Content Station is a client application that provides a combined, integrated environment for the creation & management of content to be used for print, online or on a digital device.

Content Station allows the user to easily add content to a publication, update content or browse & search for content across one or many publications.
Your administrator will have installed and configured Content Station for you, so you should be ready to start using it straight away.

1.2 Content Station User Rolls

Content Station is an application aimed at a multitude of different users, each with their own role within the workflow of creating and publishing content. Each user may have access to certain sections of the applications whereas other sections may not be available to them. Access rights are setup by your Administrator.

The following is a list of possible user roles that you may come across when working with Content Station: These roles are merely a suggestion and may vary from publication to publication. *(see figure 1)*

Role	Task
Planner	• Create new Issues in a publication • Create new dossiers with that issue • Coordinating with various people who will work with content for dossiers • Creating tasks
Reporter, Journalists, Writers	• Adding copy to the publication • Creating new copy for publication • Translates copy for a publication
Copy Sub	• Makes changes or subs copy on an InDesign layout
Section Head	• Selects copy for inclusion in a publication • Makes changes to copy in a publication
Photographer	• Adds images/picture to a publication • Updates images in a publication
Retoucher	• Manipulates images in a publication
Editor-In-Chief	• Monitors the progress on production in a publica-tion • Signs off on final pages for print
Production	• Monitors the progress on production in a publica-tion • Sends to the press the final pages once signed off

1.3 Content Station Editions

Content Station is available in two different editions: Content Station - Pro Edition and Content Station - Basic Edition.

In **Content Station - Pro** Edition all features are available, whereas in **Content Station - Basic** Edition some features are not available. Your access privileges linked, to your login details, will determine which version of Content Station you are allowed to use.

The following features are only available in **Content Station - Pro** Edition:

- My Targets
- Planning
- Create Task
- Create Dossiers
- Digital Magazines

1.4 Content Station Versions

Two different versions of Content Station exist:

Content Station AIR: Content Station as a stand-alone application, based on Adobe AIR and installed on the users desktop computer.
Content Station Web: Content Station run in a Web browser, using the Adobe Flash player plug-in.

Because of the different technologies used, some functionality will also be different for each version. If specific functionality differs for a particular version, then this is highlighted.

Content Station is required by any user that has to add or modify content in the workflow or users that create Dossiers/Job Bags & tasks. Layout users will use Smart Connection to communicate with the workflow, not Content Station.

1.5 Access Profiles

It is important to know that your administrator can control the availability of certain Content Station options or Applications via so-called Access Profiles, which are associated with your user account. It may therefore be that you will not be able to see or use certain Applications described in this User Guide or are restricted from using certain features in the Web Editor when working with documents that are stored in Enterprise.

The purpose of controlling certain functionality this way is to guarantee the content of the layout or article and to prevent any changes that don't conform to the Publication style. Restrictions can also be linked to a particular Workflow Status, so it may be that access to Content Station features changes depending on the status that a layout or article is in.

1.6 Terminology

References to the following words or phrases in this manual.

Brand: Otherwise knows as a Publication
Category: Otherwise knows as a Section
Dossier: Otherwise knows as a Job Bag
Planning: refers to the planing of the content of an issue, not advertising

2 Using Content Station

2.1 Introduction

Before getting to grips with the many features of Content Station, you may first want to know how to get started with the product for everyday use. This chapter does just that, it will guide you through some of the most commonly used tasks when using Content Station.

The following task will be handled in this Using Content Station Chapter:

- (**2.2**) Launching/Starting Content Station
- (**2.3**) Logging In
- (**2.4**) The Landing/Home page
- (**2.5**) The Search page overview
- (**2.6**) Using Search Options menu
- (**2.7**) Using Inbox mode
- (**2.8**) Using Library mode
- (**2.9**) Using Template mode
- (**2.10**) Customising the Results pane
- (**2.11**) Modifying columns in Result pane
- (**2.12**) Understanding the icons in the Results pane
- (**2.13**) Using Applications in Content Station
- (**2.14**) Logging Out

2.2 Launching/Starting Content Station

Your Systems Engineer/Administrator should have installed Content Station onto your desktop, as an icon, or provided the URL link to the web version. If Content Station has been installed on your desktop then click or double-click on the icon to launch the application. *(see Figure 1)*
If Content Station is to be opened from a web browser, key-in the URL link such as: <http://<servername>/Enterprise/ContentStation> . Your administrator should have provided the details for this link.

Figure 1

2.3 Logging In

When Content Station has been launched the Login dialogue box appears as below. The login window is the same for both the desktop & web versions. *(see Figure 2)*

Figure 2

When Content Station has been launched, the Sign-In dialog box appears. It contains the following options:

Login options: For selecting the Enterprise server to login to and entering your login details. The default server will be offered at login, but can be changed via the dropdown list.

Content Station Options: For selecting the Edition of Content Station to use.

To log in to Content Station, do the following: (*see figure 2*)

Step 1. From the Server list, choose the Enterprise server to log in to, probably division name. (❶)
Step 2. In the Username box, enter your user name. (❷)
Step 3. In the Password box, enter your password. (❸)

Your Username & Password required to login into Content Station is the same as you require to login into your desktop. If you cannot remember these then contact your systems administrator/helpdesk and ask that they reset these for you.

DO NOT *share login details, or use someone else's login details. This will cause problems with the workflow and may lead to your work being lost of corrupted.*

Step 4. (Optional) Choose the Edition of Content Station. To use click on the widget (▶) in front of Options, a dialogue box appears.
Choose one of the following options:
Content Station - *Basic Edition*
Content Station - *Pro Edition* (default setting).

NB: Which Edition of Content Station you can use is controlled by the settings for your user account. When in doubt, contact your Administrator. If you are not allowed to use Content Station Pro, the system will reset your edition to Basic.

Step 5. Click Sign In. (❺)
When logging into the Enterprise server is successful, the Home or Landing page of Content Station appears.

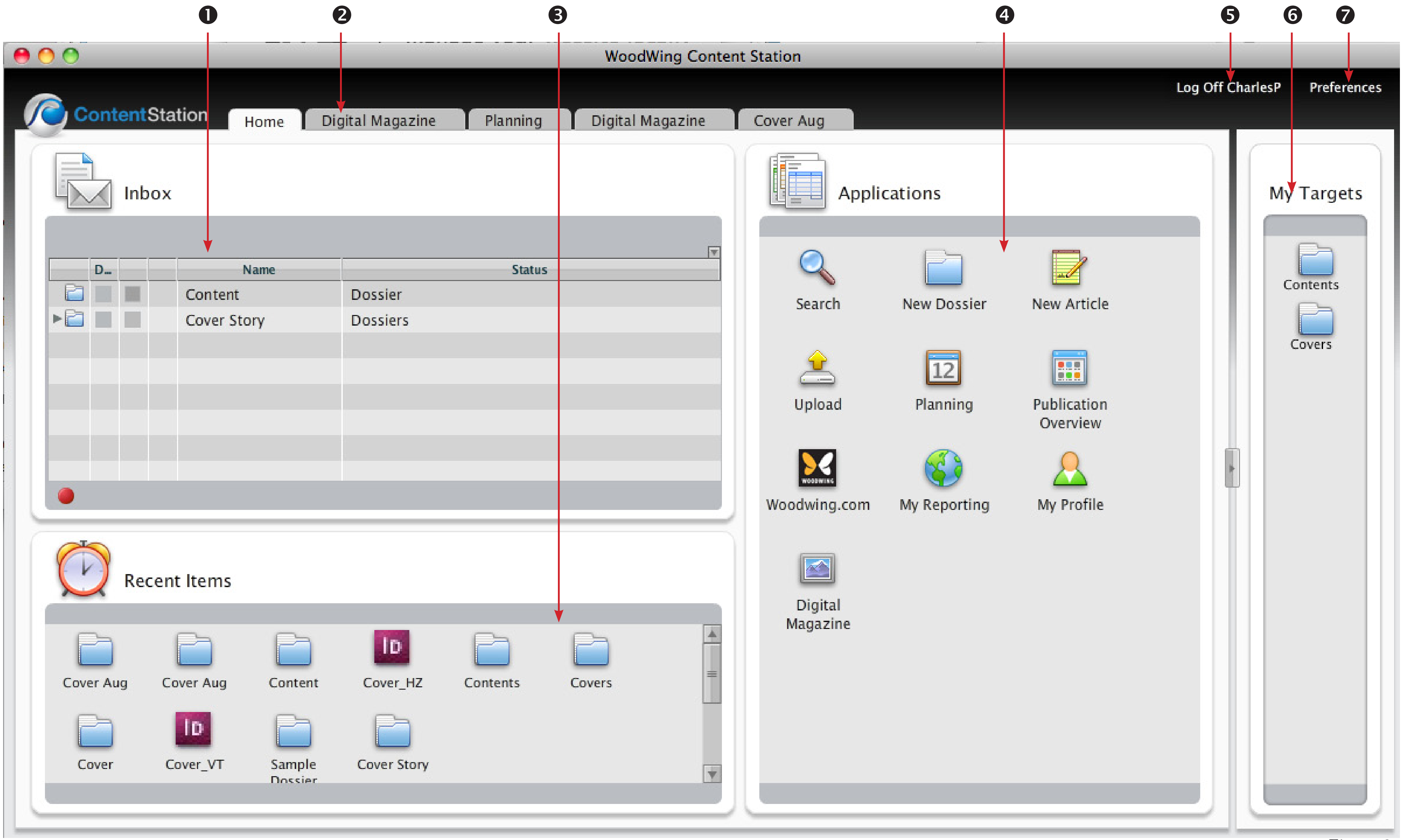


Figure 3

❶ - Inbox Pane ❷ - Application tabs ❸ - Recent Items Pane ❹ - Applications Pane ❺ - Log Off link ❻ - My Targets Pane ❼ - Preference link

2.4 Landing/Home page *(figure 3)*

InBox pane: (❶) – shows all files/objects in the Enterprise system that have been routed to you or to your user group. It contains a Document pane showing the documents in a tabular form; each document is displayed on its own row with information pertaining to that document displayed in multiple columns. Columns can be made wider or narrower, Columns can be hidden or displayed, Columns can be rearranged, Columns can be sorted.
The InBox can also be displayed in its own tab, using the Options Tab in the Search window,

Application tabs: (❷) - Each application opened in Content Station is displayed in its own page tab. Switching back and forth between such opened applications can be done by clicking that page's tab.
To close a page tab, hover the curson over the desired pages tab, a minus sign will appear, click on the minus sign to close that tab.

Recent Items pane: (❸) – The Recent Items pane shows the last ten items that you have recently worked on. The items are listed by name and the corresponding object type icon. Items can be accessed directly from this pane by double-clicking on the object. You can also Preview these object, if they have a preview, by clicking on the object to select it, press the Space bar to show a preview.

Application pane: (❹) – Shows all the applications that can be launched from within Content Station. Most of these applications are specific to Content Station operation. (*see figure 3*.)

Log off tab: (❺) – used to logout of Content Station. (*see figure 3*.)

Always logout of Content Station when not in use, this will help prevent unnecessary licenses being held back from other potential users. If your session in Content Station is dormant for a period of 2 hours, the system will automatically log you off. To prevent unnecessary loss of data, get in the habit of logging out normally.

My Targets pane: (❻) - (*Only visible when using Content Station Pro*) – Contains frequently used Dossiers, Dossier Templates, and Tasks to which files can be easily added via drag-and-drop. (*see figure 3*.)

Preferences tab : (❼) - For setting various Content Station view settings. Controls the text size for all items displayed in the Inbox and those in the Document pane (when displayed in List View mode or Detail View mode). The size of the text in the Properties pane is also controlled via this setting. Possible settings are: extra small, small, normal (default setting), large, extra large. (*see figure 3*.)

2.5 The Search Page - Overview

Searches are performed by making use of the Search application which is accessed by double-clicking the Search icon ( ) in the Applications pane on the Home page. The Search page will open into its own window or tab. (*see figure 4*)

Searches are performed by making use of the various search modes available in Content Station. These can either be modes with pre-defined criteria, or you can enter your own criteria. Often-used searches can also be saved for repeated use.

Search Options: (❶) – Selects the different type of search, being Default Search or Custom Search. You are also able to display your InBox from this menu option.

Search lists: (❷) - more about how these work laster in this chapter.

Results pane: (❸) – shows the results of your search

Preview pane: (❹) – Shows a preview of the object selected on the Results pane.

Properties pane:(❺) – shows the properties of the selected object in the Results pane.

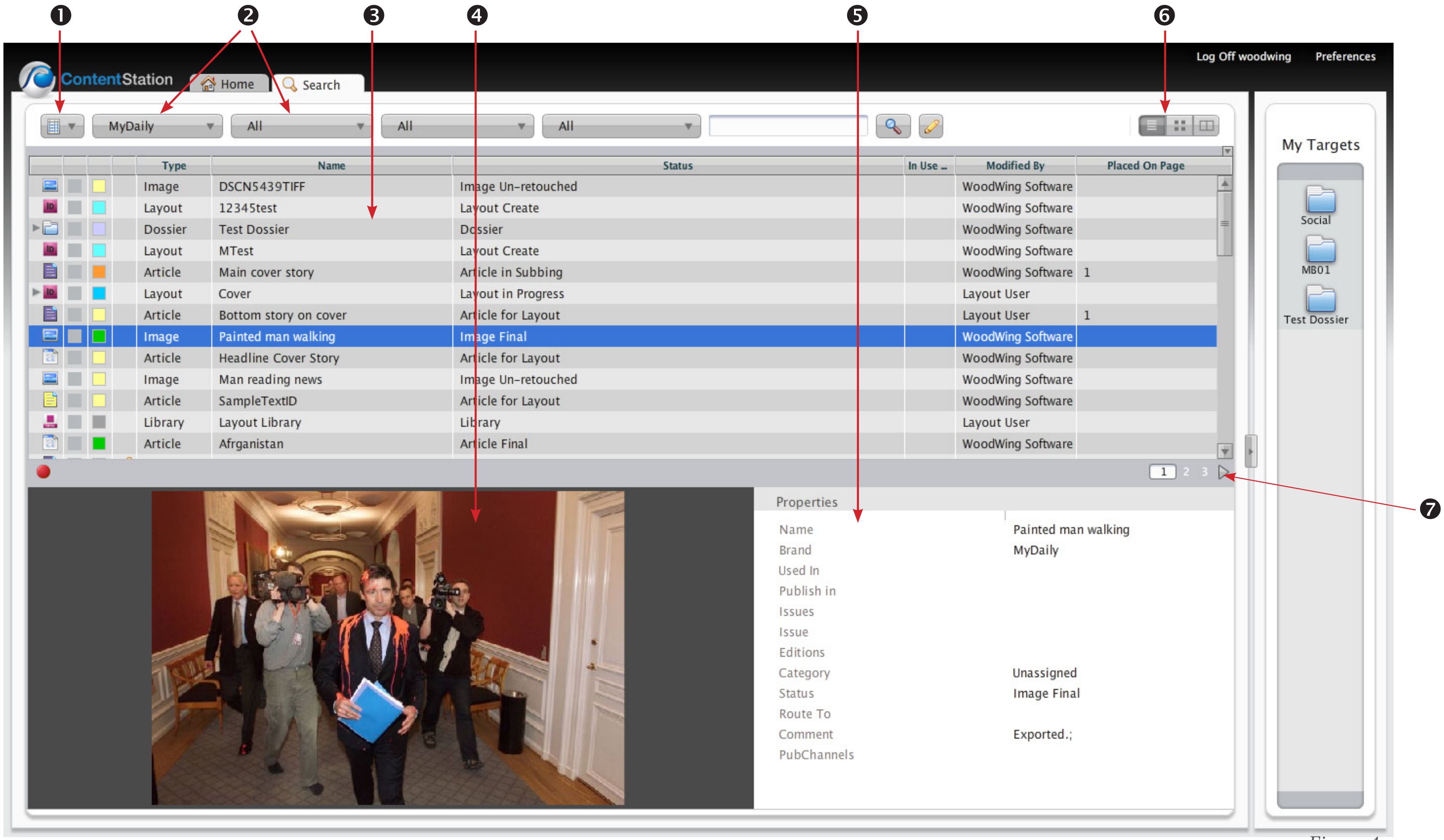
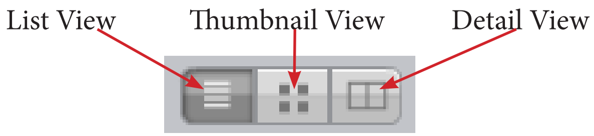


Figure 4

❶ - Search Option ❷ - Search List ❸ - Results pane ❹ - Preview Pane ❺ - Properties pane ❻ - Results View Modes ❼ - Next Page

Results view modes: (❻) - The Document pane can be displayed in three different view modes: (*more about their use laster)*



List View: (default setting). Displays the files in tabular form.

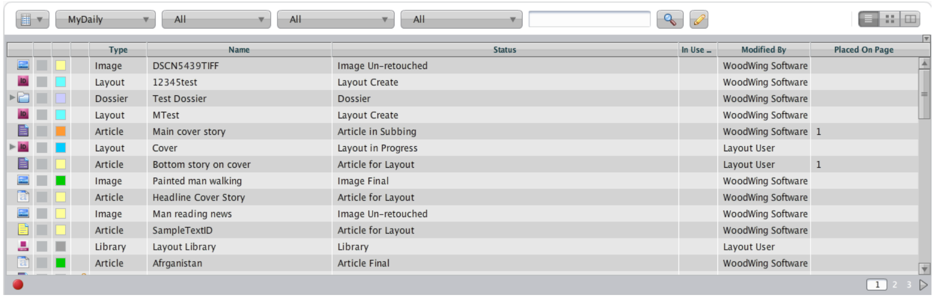


Figure 5

Thumbnail View: Displays a preview of each file, if the file can be previewed. Note in this example a number of files do not contain a preview.

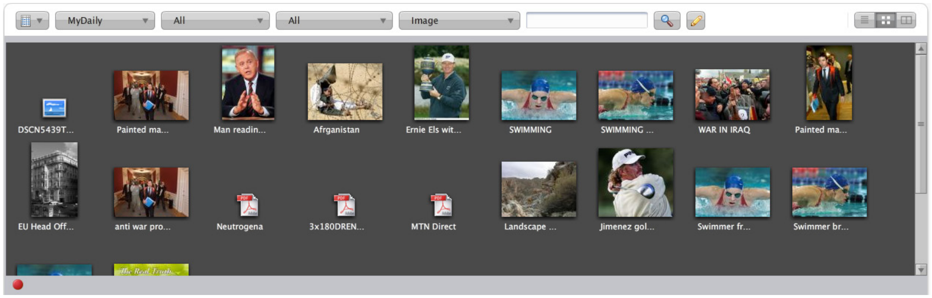


Figure 6

Detail View: Displays the first 250 characters of each article or text file. Each mode can be selected from the View buttons located in the Search pane.

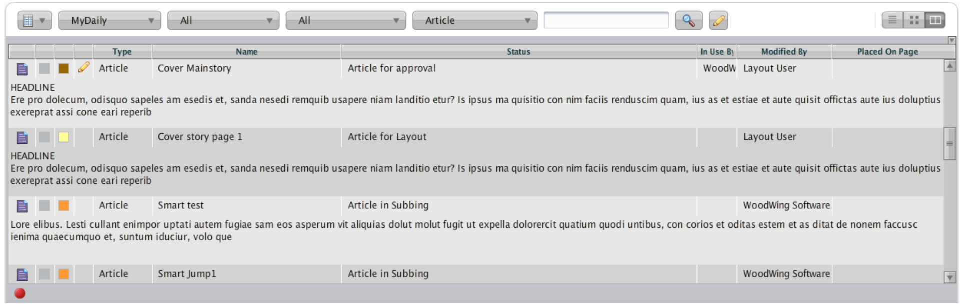


Figure 7

2.6 Using Search Options Menu

See figure 4 (❶)

Option	Description
Search (default)	• Used for locating files by using drop-down lists. This is the normal search option, shown in more detail under the Using Search Mode(2.7).
Custom Search	• Via this mode, the Search Criteria dialog box can be displayed with which you can create your own searches by specifying specific criteria. Any custom-made searches can be saved, after which they are displayed at the bottom of the menu (in alphabetical order).
Inbox	• Used for locating all files that have been routed to you or your user group.
Libraries	• Used for locating all InDesign libraries, used by Layout users.
Templates	• Used for locating all layouts, Layout Modules, and article templates, used by Layout users.

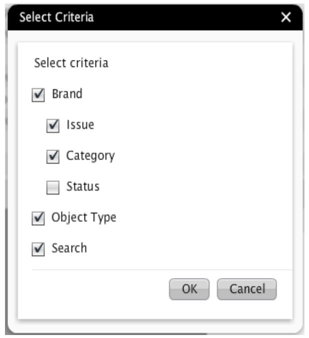
2.6.1 Setup default Search criteria

The Default Search mode is the most generic mode of the Search applications and is used to search through the entire Enterprise system.

In Default Search mode, the Search pane can consist of several different drop-down lists. These drop-down lists are made available using the Select Criteria options (*see figure 8*).

Tick those lists that you wish to use during any search. (*See Criteria Options box figure 9*)

Figure 8 (Default Search lists)

Search Criteria	Lists	Description
 Select Criteria; Select criteria; Brand; Issue; Category; Status; Object Type; Search; OK; Cancel. *Figure 9*	**Brand/ Publication**	• Contains a list of all Publications on the server to which you have logged in and to which you have been given access by your administrator.
	Issue	• (Not shown by default) Contains a list of all Issues available for the selected Publication.
	Category/ Section	• Contains a list of all Categories available for the selected Publication.
	Status	• (Not shown by default) Contains a list of all Statuses for the selected Publication.
	Object Type	• Contains a list of all object types used by Enterprise.
	Search	• Allows you to enter free text to search for.

Click on the **Search/Refresh** icon (🔍) to execute the Search which populates the Results pane with the found files (if any). This icon also acts as a Refresh button to update the content of the Results pane.

2.6.2 Using the default Search mode

When first using Default Search mode, all lists are set to All, meaning that all items in that list will be included in the search. There is no specific order in which the selections from the lists need to be made, but normally this is done from left to right.

To search for files using the Default Search mode, do the following:

- **Step 1.** (Optional) From the **Publication** list, choose a specific Publication. You will only see those Publications in the list that you have permission to use. The **Issue**, **Section/Category,** and **Status** lists are set to **All** and are populated with their respective items for the selected Puublication.
- **Step 2.** (Optional) From the Issue list, choose either a specific Issue by name or the default setting All.
- **Step 3.** (Optional) From the Category/Section list, choose either a specific Category/Section by name or the default setting All.
- **Step 4.** (Optional) From the Status list, choose either a specific Status by name or the default setting All.
- **Step 5.** (Optional) From the Object Type list, choose either a specific object type or the default setting All.
- **Step 6.** (Optional) In the TextBox, enter a phrase to search for.

Take note of the following conditions that apply when searching using TextBox: Entered words must be between 3 and 15 characters long.
Add a plus (+) sign in front of a word to indicate that a word should be part of the search results.
In order for the options in the list to be available, make sure that a Publication is chosen first in the Publication list.
Add a minus (-) sign in front of a word to indicate that a word should not be part of the search results.
Place multiple words word between single quotation marks (‘) to treat is as a single phrase.

- **Step 7**. Click Search icon (🔍) or press ***Enter*** to start the search.

The following actions will take place:

- The search Results pane, *see figure 5*, is populated with the files that meet the criteria. If no files are displayed, either none meet the criteria or you have not been given sufficient access rights to view the files.

- The results for Issue, Category/Section, and Status are dependent on the Publication they are part of.

2.6.3 Using Custom Search mode

The Custom Search mode allows you to search using your own criteria by creating a custom search. These custom searches can subsequently be saved after which they are added to the Search menu, thereby making it easy to use them on a regular basis.

In Custom Search mode, the Search pane consists of the following components:

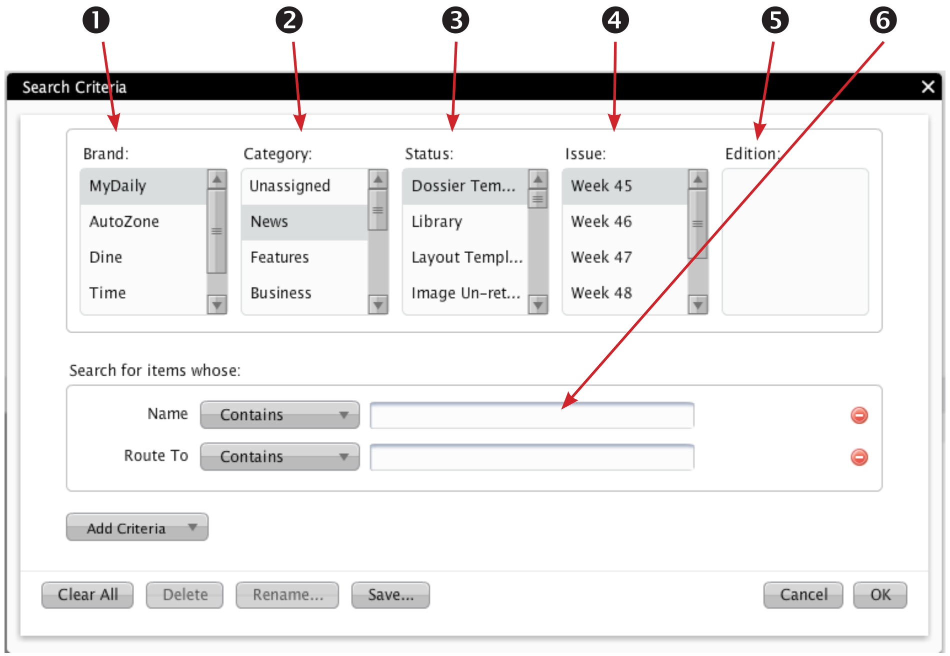


Figure 9

- (❶) allows for the selection of a Publication/Brand;
- (❷) allows for the selection of a Category/Section;
- (❸) allows for the selection of a Status;
- (❹) allows for the selection of an Issue;
- (❺) allows for the selection of an Edition;
- (❻) allows for the addition of multiple criteria such as Name, Route to and Comment. To remove a criteria option click on the red (-) and this will remove that criteria from the search.

These searches can then be saved for later use, and once saved, will appear as a named search in the Search Options menu.

Click on ***OK*** to perform the search. The results of the search will appear as normal in the Results pane.

2.7 Using InBox mode

The Inbox mode is used to show all files in the Enterprise system which have been routed to you or to one of the user groups to which you belong, plus all objects that are assigned to your Personal workflow status.

Use the Search (🔍) icon to refresh & updates the content of the Results pane.

2.8 Using Library mode

The Libraries mode is used to show all InDesign Libraries (.indl files) that are available in the Enterprise system. As a Content Station user it is unlikely that you will use this search mode often. The reason why this search mode is available is that this is one of the default search modes set up by your administrator for all users of Enterprise. This search mode is mainly aimed at InDesign users and this search would normally be performed from InDesign not using Content Station.

Use the Search (🔍) icon to refresh & updates the content of the Results pane.

Return to Table of Content

2.9 Using Template mode

The Templates mode will display all template files in the Enterprise system. These could either be layouts, layout modules, articles, or Dossier templates.

Use the Search (🔍) icon to refresh & updates the content of the Results pane.

2.10 Customising the Results pane

After setting criteria in the Search pane (see section 2.6.1. Setup default Search Criteria), the resulting files are subsequently displayed in the Results pane. (*See figure 10 below.*)

The Results pane is your central area for managing files such as adding them to a Dossier, routing them to a user or user group, removing them from the system, and more.

The way that the files are displayed in the Results pane can be fully customized to suit your workflow by changing any of the following:

View modes: View the results in List View, Thumbnail View, or Detail View. (*See section 2.5 Search Page Overview, figures 5,6 &7*)
Changing columns: (List View and Detail View mode only) Show or Hide columns, resizing columns and arranging them in a different order.
Sorting: (List View and Detail View mode only) Sort columns in descending or ascending order.

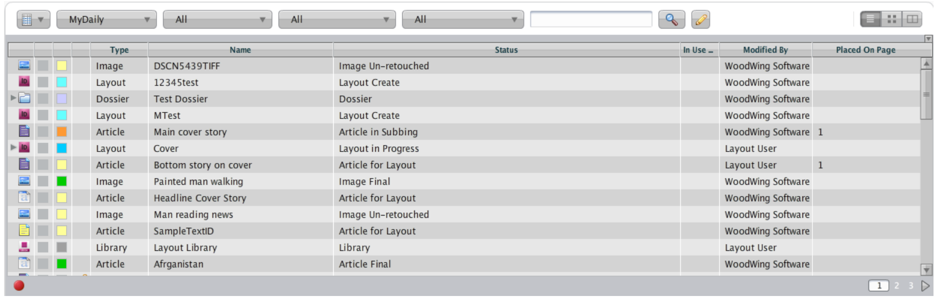


Figure 10

2.10.1 Show or Hide Columns in Results pane

Click on the Show Column list icon (*see figure 11a&b*) to reveal the options.

Figure 11a

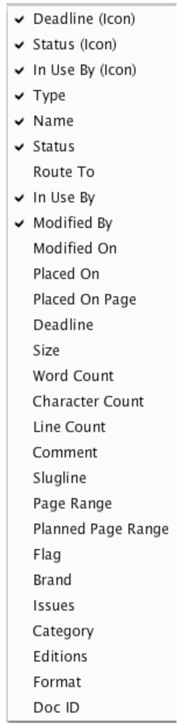


Figure 11b

Initially, only a limited number of columns are displayed, but columns that are hidden from view can be easily displayed at any stage.

To show or hide columns, do the following:
Step 1. Click the Column List button (*see figure 11a*)
A popup menu appears (*see figure 11b*) showing all available columns. Columns that are currently visible have a check mark in front of their name, columns that are currently hidden do not have such a check mark.
Step 2. Click on a column name, the context menu disappears. If the column was previously hidden, it will be displayed and placed to the right of the last column; if the column was previously displayed, it will be hidden. Repeat Steps 1 & 2 until all columns are displayed or hidden as needed.

2.10.2 Changing the Column Width:

To change the width of a column, do the following:
Step 1. Place the mouse pointer over the column divider to the right of the column of which the width needs to be changed. The mouse pointer changes into an arrow pointing left and right.
Step 2. Click+Drag the divider to the left or right to make the column narrower or wider.
Columns containing icons cannot be scaled, made narrower or wider.

2.10.3 Rearrange Columns in a different order:

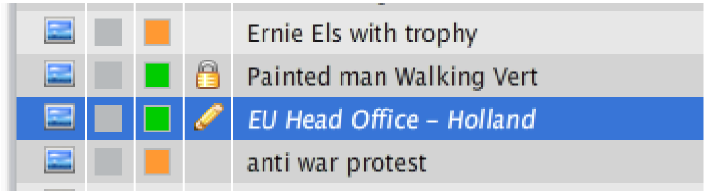
Click+Drag on the header of the column that needs to be moved to another location, then while holding down the mouse button, move the selected column left or right as required. Release the mouse button to drop the column in its new position. While dragging, the column header is displayed in blue.

2.10.4 Sorting content in a Column(s):

Columns can be sorted in ascending or descending order by doing the following:
Sorting individually. Click once on any column header. If the column was previously not sorted, it will be sorted in descending order. Any subsequent clicks will sort the list in the opposite direction. The order is shown by means of a triangle pointing up or down next to the column header name.
Sorting multiple columns. To sort the list according to the criteria of multiple columns, click once on the first column header and Cmd+click (Mac OS) or Ctrl+click (Windows) each subsequent column header. The columns will be sorted in the order they are clicked. The order is shown by means of a triangle pointing up or down next to the column header name. Multiple column sorting can be disabled by single clicking any column.

2.12 UNDERSTANDING THE ICONS IN THE RESULTS PANE

The first 4 columns of the Results pane show a series of differnt icons, which are described below.

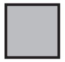
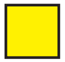


❶ ❷ ❸ ❹ *Figure 12*

The first column (❶) shows the Type icon of the object.

Type Icon	Description
	Article InCopy
	Article HTML text
	Article Plain text
	Ms Word Document
	Dossier
	InDesign layout
	Video
	Images
	Audio

The second column (❷) shows the state of the deadline that is set when creating an issue.

Deadline Icon	Description
	Gray, object has no deadline set
	Green, object is well within the deadline set
	Yellow, object is nearing the deadline set
	Red, object has passed the deadline set

The third column (❸) shows the colour designated to a status. These colours are set when a publication is created. The default colours are set as:

- **Yellow** - object being created or at beginning of its cycle.
- **Orange** - Object nearing completion of its cycle.
- **Green** - Object has completed its cycle.

The fourth column (❹) is the In Use By column

In Use By Icon	Description
	Yellow Pencil: The current user has the file open or checked-out, or has the files Properties dialogue open
	Yellow Padlock: Another user has the file open check-out, or has the files Properties dialogue open.

The In-Use By icon will also indicate who has the object locked. To check this hover the cursor over the Padlock and the name of the user will be revealed.

2.13 Using Applications in Content Station

The functionality of Content Station is driven by the available Applications. Each Application can be seen as a tool with which you can perform a specific job.

The default Applications shown are used specifically in Content Station. These open within Content Station, usually in their own page/application tab.

All available Applications are accessible via the Applications pane on the Home page. (For more information about the Home page, see chapter 2.4, The Landing/Home Page.)

Table below shows the default applications that are shipped with Content Station:

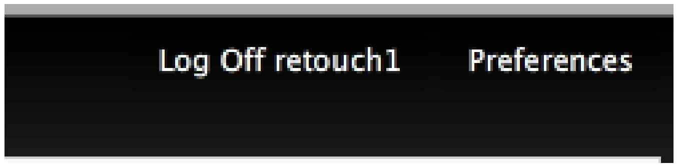
Application	Icon	Description
Search		• For locating a particular file in the Enterprise system
New Article		• For creating a new article, not used in in normal workflow.
Upload		• For uploading files to the Enterprise system
Publication Overview		• Provides an overview of how far the production process of a publication has progressed.
My Reporting		• For displaying the Reporting page from which various reports can be run. This is defined by your access privileges
Woodwing Web site		• Display the Woodwing website
Planning[1]		• For planning Dossiers on Issues as well as for the creation of Issues, Dossiers, and Dossier templates
Digital Magazine[1]		• For planning & manipulating a Digital Magazine issue
New Dossier[1]		• For creating a new Dossier

Note: [1] indicates that this is only available when your Administrator has given you sufficient rights. These are only available when using Content Station Pro.

2.14 Logging out

When finished working in Content Station, don't forget to log out of the Enterprise system. This makes sure that any panel settings are saved to the system so that you can make use of these settings when next logging in, even when logging in from another system.

From the Content Station menu A , click on Log Off. After logging off, the Sign In dialog box will reappear



3 Uploading Content in Woodwing

3.1 The Upload Application

The Enterprise system allows users to upload files into the workflow using the Upload Application in Content Station. This Application lets you add files of different types to the Enterprise system.

This can be helpful for instance when adding content to existing Dossiers in a publications issue.

The Upload page can be displayed by double-clicking the Upload icon in the Applications pane on the Home page.

When uploading from Content Station Web, a file size limit of 100 MB needs to be respected.

3.2 Uploading Files

To upload a file using the Upload Application, do the following:

Step 1. (Double-)click the Upload icon in one of the following locations:
In the Applications pane on the Home page
In the Toolbar of a Dossier page (*see figure 3c*)
In the Properties dialog box of a Task (*see figure 3d*)
The Select dialog box appears. (*see figure 3a*)

Step 2. Browse your system to locate one or more files to upload and select them.

Step 3. Click Select.
When multiple files are selected, they all need to be of the same file type, else a message is displayed.
When a file is uploaded which is not of a supported file format, a message is displayed. (*See figure 3b*).

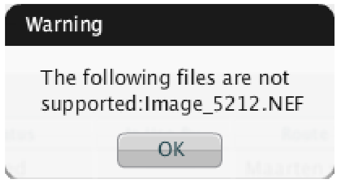


Figure 3b. A message appears when uploading files of an unsupported format.

The Upload dialog box appears with the selected files shown in the Files list on the left. (*See figure 3a*.)

Step 4. (*Optional*) If additional files need to be uploaded, click the Add icon ( ) 2 or drag them onto the Files list. Again, the files are validated
for the correct file formats.

Step 5. (*Optional*) If any of the files listed in the Files list need to be removed, select the file and click the Remove icon ( ) 3 . At least one file needs to remain in the list.

Step 6. (*Optional*) Click on the name of the file to change the file name.

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Step 7. (*Optional*) Select a file to view a preview (when available) ❹. The file highlighted is the one that will be previewed.

Step 8. From the Brand list ❾, choose the Brand/Publication to which the file(s) need to be uploaded.

Step 9. (*Optional*) From Publish In section, choose the issue within the Brand/Publication where the file(s) need to be uploaded to by doing the following:

> **Step 9a**. From the Issue list, select the Issue ❺.
>
> **Step 9b**. Click the Search icon (🔍) to display a list of Editions, if they are used, and select the Edition to which the file(s) need to be uploaded to.

Step 10. (*Optional*) Choose additional issues within the Brand/ Publication by clicking the Add icon ( ) ❼ and repeat Step 7. To remove the file from an issue within a Brand/Publication during upload click on the ( ) ❻ next to that issue.

Step 11. From the Category/Section list, choose the Category/Section to which the file(s) need to be uploaded.

Step 12. From the Status list, choose the Status that the uploaded file(s) should have.

Step 13. From the Dossier list, choose the Dossier into which the files need to be placed after uploading.

Step 14. (*Optional)* From the Route To list, choose a user or user group to whom the file(s) should be routed to.

Step 15. (*Optional*) In the Comment box, add a comment.

Step 16. Click Upload ❽.

Upload Application dialogue box

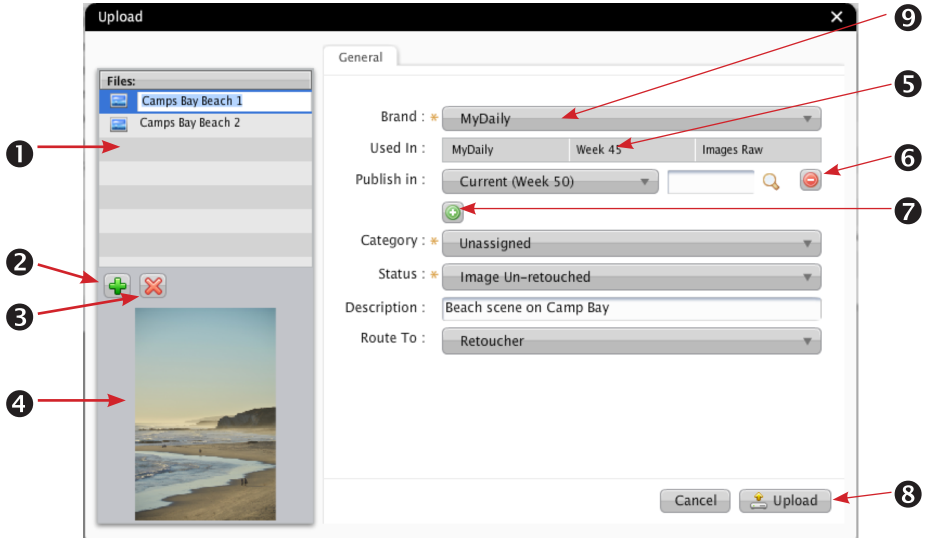
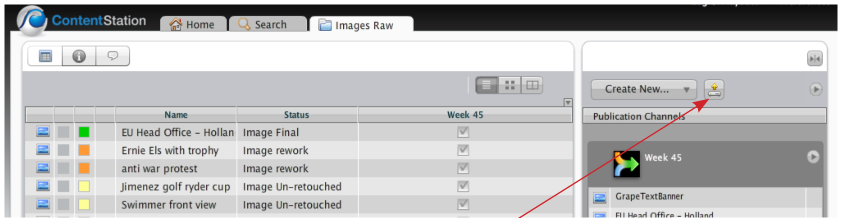


Figure 3a

❶ Files list ❷ Add files ❸ Remove selected file ❹ Preview ❺ Issue list
❻ Remove from Issue ❼ Add to Issue ❽ Upload ❾ Brand/Publication list

Dossier page tab toolbar



Upload icon on Dossier page tab

Figure 3c

4 Using the Planning Application

The Planning Application is mainly aimed at Content Station managers who need to regularly plan current or future publications within a particular Brand/Publication. Planning is done by managing Dossiers and their content. Planning is only available using Content Station Pro.

Via the Planning Application, Dossiers can be quickly and easily created, added to Issues or otherwise managed. New Issues or Dossier templates can be created from this page as well.

This chapter gives a detailed overview of how to use the Planning page.

The Planning page can be displayed by double-clicking the Planning icon in the Applications pane on the Home page.

4.1 The Planning Page Components

The Planning page contains the following components (*see figure 4a on the next page*):

- **Brands list**. For choosing the Brand/Publication in which the Dossiers need to be managed.
- **Categories list**. For choosing the Category/Section in which the Dossiers need to be managed.
- **Issues pane**. Shows the available Issues for the selected Brand/Publication and Category/Section.
- **Planned Items pane**. Displays the available Dossiers within the selected Issue.
- **Dossier Templates pane**. Displays the available Dossier templates within the selected Brand/Publication and Category.

Each component is described in more detail in the following sections.

4.2 The Brands List

The Brands list is used to select the Brand for which you wish to manage Dossiers. It holds all Brands which you have been given access to.
After making a choice from the Brands list, the Issues pane, Planned Items pane, and Dossier Templates pane are automatically populated with their relevant content for the chosen Brand (if any).

4.3 Categories List

The Categories list shows all Categories within the selected Brand. When choosing a new Issue, the Dossier Template list is refreshed to show all Dossier Templates within that Category. Also, when an Issue has been chosen from the Issues pane, the list of visible Dossiers will be filtered on the chosen Category.

4.4 The Issues Pane

After making a choice from the Brands list, the Issue pane is automatically populated with the available Issues for that Brand (if any). In addition, an item named [Unassigned] is listed; clicking this item displays all Dossiers within the currently selected Brand which are not part of an Issue yet (if any).
To start planning Dossiers, choose an Issue from the list. The Planned Items pane is automatically populated with the available Dossiers for that Issue (if any).
In case the required Issue does not exist yet, it can be created.

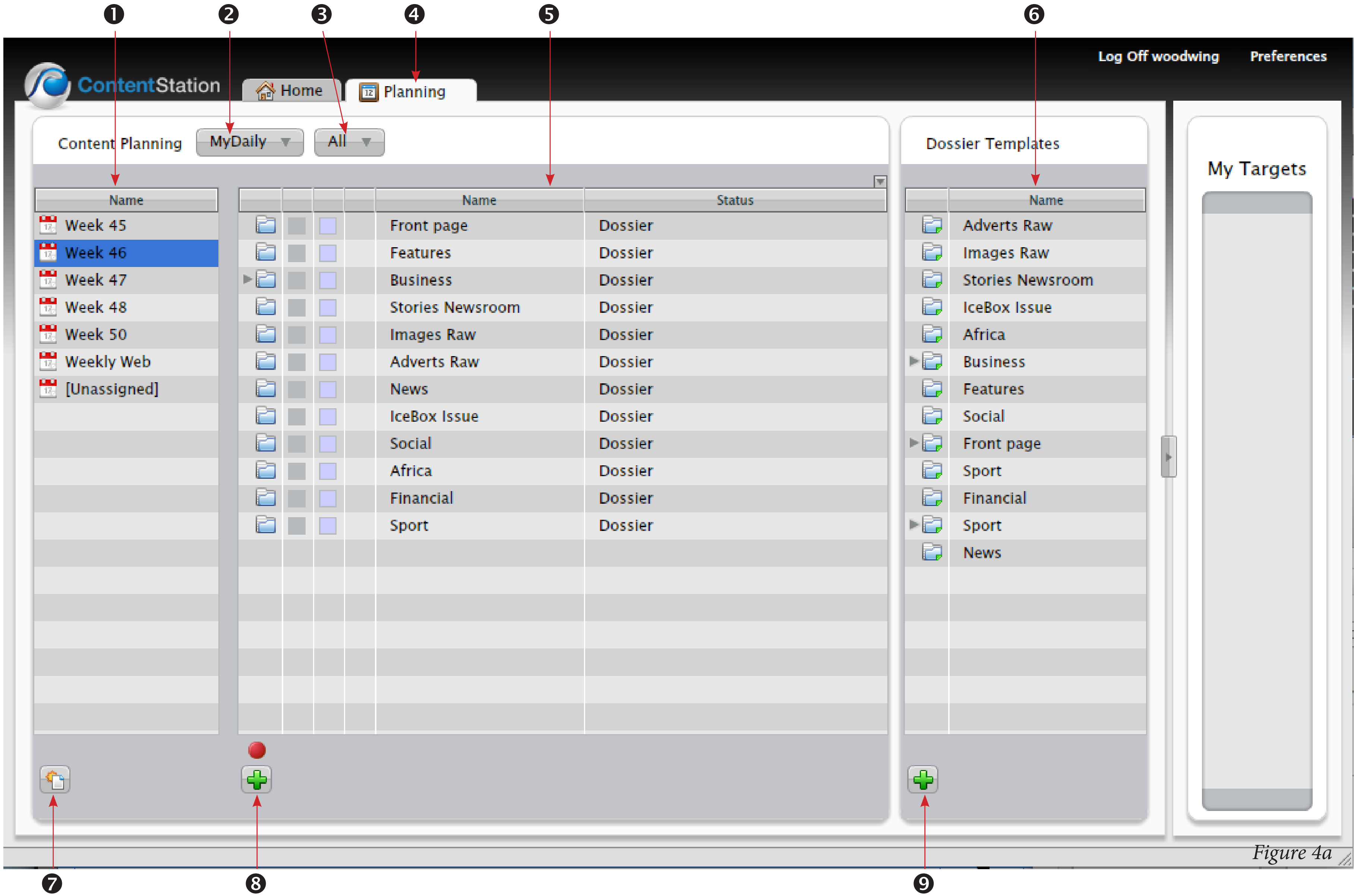


Figure 4a

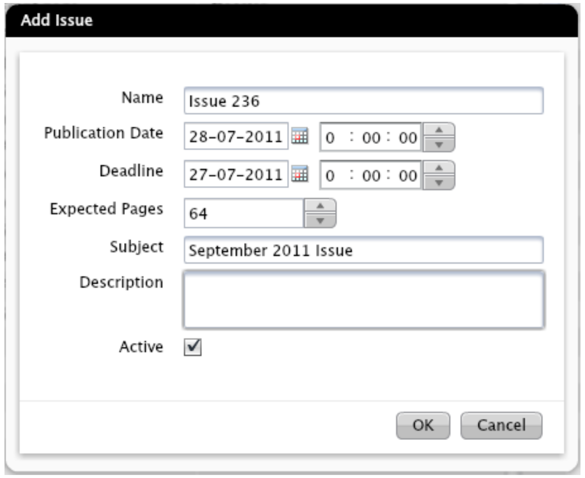
❶ Issues pane ❷ Brand/Publication list ❸ Category/Section list ❹ Planning page tab ❺ Planned items pane ❻ Dossier Templates ❼ Add New issue ❽ Add New Dossier ❾ Add new Dossier template

4.5 Creating a New Issue

To start planning for a new Issue, the Issue has to be created first by doing the following:

Step 1. Click the Add New Issue icon ( ) at the bottom of the Issue pane. The Add Issue dialog box appears.

Figure 4b. The Add Issue dialog box



Step 2. In the Name box, enter a descriptive name for the Issue.

Step 3. (Optional) In the ***Publication Date*** box, enter a date by doing one of the following:

- Enter a date manually
- Click the ***Date Picker*** icon ( ) to display the Date Picker and choose a date.

Step 4. (Optional) Set a publication time by entering a time in the ***Publication Time*** box.

Step 5. (Optional) In the Deadline box, enter a date by doing one of the following:

- Enter a date manually
- Click the Date Picker icon ( ) to display the Date Picker and choose a date

Step 6. (Optional) Set a Deadline time by entering a time in the ***Deadline Time*** box.

Step 7. (Optional) In the ***Expected Pages*** list, set the number of expected pages.

Step 8. (Optional) In the ***Subject*** box, enter a subject.

Step 9. (Optional) In the ***Description*** box, enter a description.

Step 10. Select the ***Active*** check box to make the Issue active or clear the check box to not make the Issue active.

Step 11. Click ***OK***.

The Issue is created and added to the Issues pane.

4.6 Changing the Properties of an Issue

To change the properties of an Issue, click on the Issue name in the Issues pane, then Right-Click and the ***Properties*** dialogue box will appear. Make the required, using the same technique as in Creating a New Issue (4.5) above.

Click on ***OK*** to save any changes made.

4.7 The Planned Items Pane

After selecting an Issue in the Issues list, the Planned Items pane displays all Dossiers that have been assigned to that Issue (if any).

Changing the view

The Planned Items pane acts in the same way as the Document pane of a Search Application: columns can be hidden or displayed, columns can be sorted, etc. For more information about the way the Dossiers can be displayed, see chapter 7, Search Applications – section 5.2, Changing Columns.

Click the expander (▶) in front of a Dossier icon to show the content of the Dossier.

Managing Dossiers

To manage each Dossier, do one of the following:

- Double-click the Dossier to open it in its own tab. The Dossier page is displayed from which various actions can be performed such as adding content to the Dossier, creating Tasks, creating articles, etc.
- Right-click the Dossier to access its context menu and choose from the available commands.
- Create a new Dossier by clicking the Create Dossier icon ( ).
-

4.8 Adding Dossier Templates to an Issue

A Dossier template is a reusable Dossier containing all the components required for specific projects. For instance, if a project always contains a file with instructions, article templates, specific tasks, etc, then a Dossier template can be created containing these components. It can then be quickly turned into a Dossier by the user. This way, Dossiers with similar content do not have to be created manually every time.
After selecting a Brand from the Brands list, the Dossier Templates pane shows all Dossier Templates that are available in that Brand.

To manage the content of the Dossier template, do the following:

- In the Dossier template list, Opt-double click (Mac OS) or Alt-double-click (Windows) the Dossier template.

The Dossier template will open in its own tab.

From here, managing the Dossier template is identical to managing a regular Dossier.

4.9 Moving Dossiers Between Issues

An important part of the Planning Application is the option to move Dossiers between Issues. This can be done by doing the following:

Step 1. From the Brands list, choose the Brand in which Dossiers needs to be moved.

Step 2. In the Issues pane, choose an existing Issue or the [Unassigned] Issue.

All Dossiers that are assigned to that Issue appear in the Planned Items pane.

Step 3. Use one of the following methods:

- Drag a Dossier onto an Issue in the Issues pane. The Dossier will be removed from the current Issue and added to the new Issue.
- Perform the same action as above, but with the Alt key pressed. Instead of moving the Dossier, it is now copied to the new Issue.

5 Using Publication Overview

The Publication Overview page gives a general view of how far the production process of a Brand has progressed. It provides a thumbnail view of each layout together with pertinent information about the layout and its items, including the Workflow Status.

Specific actions can be performed on each layout, such as viewing in full-size, placing Sticky Notes, and changing its properties.

This chapter gives a detailed overview of how to use the Publication Overview page.

The Publication Overview page can be displayed by double-clicking the Publication Overview icon ( ) in the Applications pane on the Home page.

5.1 Publication Overview Page Components

The Publication Overview page contains the following components (*see figure 5a on the next page*):

- **Search pane**. Used for specifying criteria in order to locate the stored publication in Enterprise.
- **Preview pane.** Shows a preview and layout information of all found layouts, based on the criteria set in the Search pane.

Each component is described in more detail in the following sections.

5.2 The Search Pane

The Search pane is used to locate the layouts of the Brand of which you want to see the current status. It consists of the following components: (*see figure 5b*)

Brand list. Contains a list of all Brands on the server to which you have logged in and to which you have been given access by your administrator.
Issue list. Contains a list of all Issues that are available for the selected Brand.
Edition list. Contains a list of all Editions that are available for the selected Brand.
Category list. Contains a list of all Categories that are available for the selected Brand.
Status list. Contains a list of all statuses for the layouts in the selected Brand.
Search/Refresh button. Executes the search and populates the Preview pane with the found layouts (if any). It also acts as a Refresh button to update the content of the Preview pane.

To locate a publication using the Search pane, do the following:
Step 1. Make the desired choices from the Brand, Issue, Edition, Category, and Status lists.
Step 2. Click Search ( ).
The layouts that meet the criteria are displayed in the Preview pane. If no layouts are displayed or less layouts appear than expected, there may not be any layouts that meet the criteria or you may not have sufficient access rights to view certain layouts.

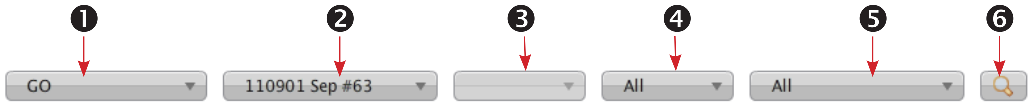


Figure 5b

❶ Brand list ❷ Issue List ❸ Editions list ❹ Category/Section list ❺ Status list ❻ Search/Refresh icon

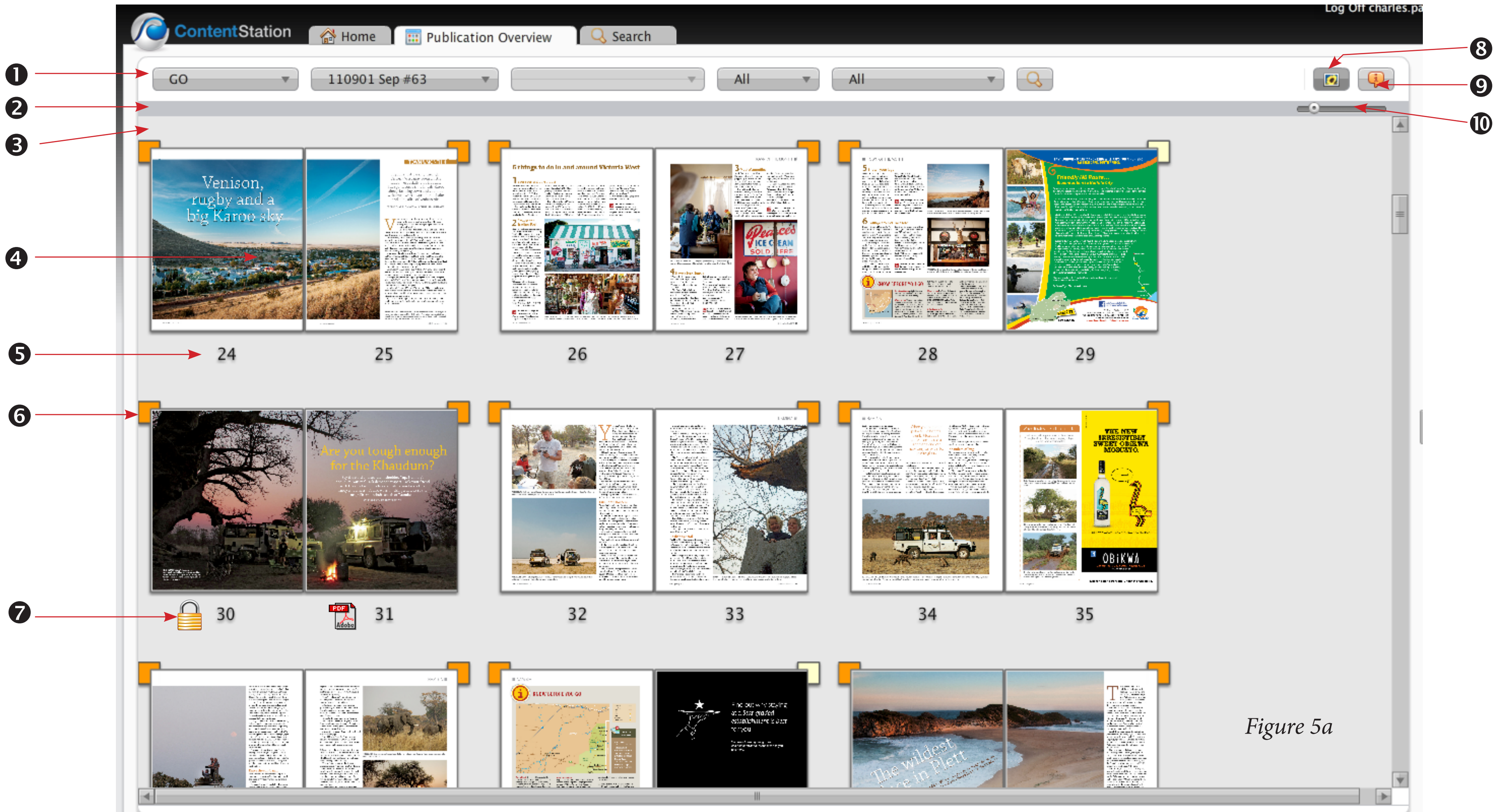


Figure 5a

❶ Search Lists ❷ Page numbering conflicts ❸ Preview pane ❹ Page Preview ❺ Page number ❻ Page Status ❼ In Use By icon ❽ Hide/Show previews ❾ Hide/Show Status ❿ Preview Size slider

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5.3 The Preview pane

The Preview pane shows all layouts that meet the criteria set in the Search pane (*see figure 5a*).

Initially, no previews or status colors are displayed. To enable these, use the preview controls icons.

Show/hide preview Show/hide status

Layouts will be displayed with the following details (*see figure 6*):

- **Layout Workflow Status color (❶).** The color of the layout's Workflow Status is indicated by a square in the top corner.

- **Layout Workflow Status name (❷).** The name of the Workflow Status is shown via a tooltip when hovering the mouse over the colored square. Layout name and layout Workflow Status name. The name of the layout as well as the name of its Workflow Status is shown via a tooltip when hovering the mouse over an empty section of the page.

- **Layout item Workflow Status color (❸).** Each layout item that is stored in the Enterprise system is highlighted in the color of its Workflow Status. This also makes it easy to identify each separate layout item on the page.

- **PDF icon (❹).** Indicates that the system has automatically generated a PDF for the layout. Click the icon to download the PDF to a specified location.

- **Lock icon (❺).** Appears when a user is currently editing the file. When the Dynamic Update feature is active, this icon will appear/ disappear automatically when the file is checked-out or checked-in.

- **Page number (❻).** Page number (displayed in the set page number style).

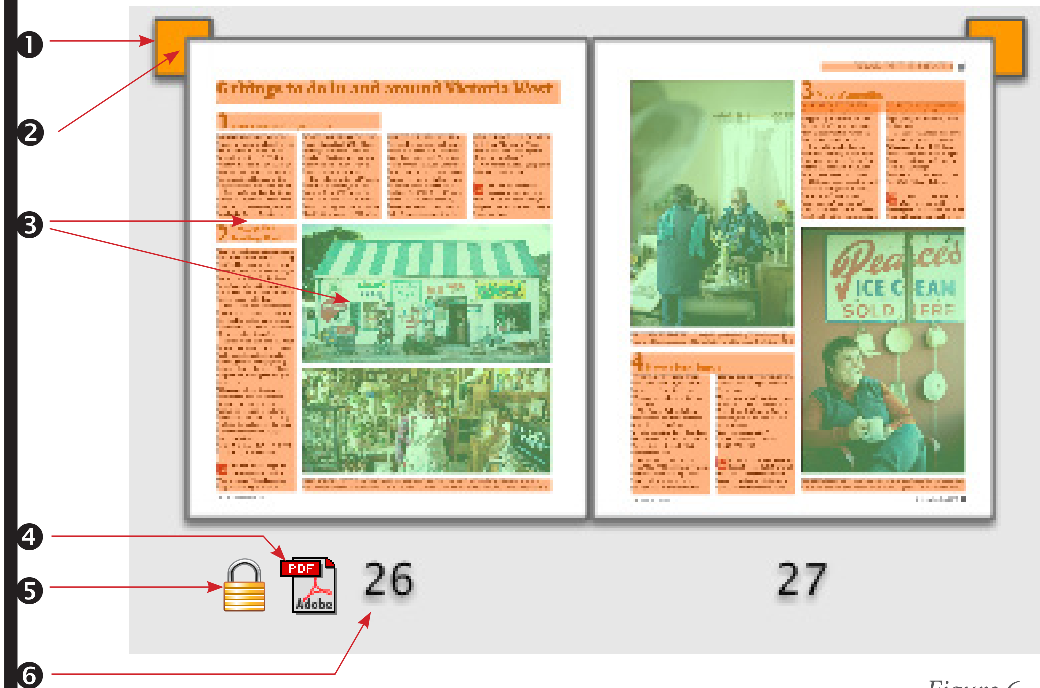

Figure 6

5.4 Full Layout Preview

Each page of the layout can be displayed in full size by loading it in the Full Layout preview. An additional toolbar provides various controls and tools. (*See figure 3 on the next page.*)

To display a layout in full view, do one of the following:

- Double-click the preview
- Right-click the preview and choose ***Preview***... from the context menu

The page will appear in full size. The following components are available:

Close button ❶. For closing the Full Page view and return to the Publication Overview page.

Navigation buttons ❷. Use the First Page, Previous Page, Next Page, and Last Page buttons to navigate through the publication.

Current page/available pages ❸. Shows the currently displayed page, together with the total number of available pages in the publication.

Preview size slider ❹. Use to adjust the size of the page preview. Possible sizes are between 10 % and 300 %. To see the currently selected size, click and hold the slider button; the current setting will appear in a tooltip.

Preview size list ❹. Choose from one of the following options: 100 %, Fit Width, or Fit Height. As soon as a choice is made, the current zoom percentage is displayed in the list.

Add Sticky Note ❺. For adding a Sticky Note on the layout. (For more information about Sticky Notes, see section 5.4 Sticky Notes.)

Show/Hide Sticky Notes ❻. For showing/hiding Sticky Notes that are placed on the layout. (For more information about Sticky Notes, see section 5.2 Sticky Notes.)

Single page/spread view ❼. For viewing single pages separately or spreads.

Show/hide placed items ❽. Show or hide items placed on the layout which are saved in Enterprise. When active, the frame border will be stroked in the color of the item's Workflow Status.

Layout information. When hovering the mouse pointer over an empty area of the layout, a tooltip appears showing the name of the layout and the name of the layout's Workflow Status.

Figure 3

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6 Check-Out/In content using Content Station

The File Check-out feature allows you to double-click any file in Content Station and have it opened for editing. During this process, the file is automatically checked-out and opened in its appropriate application.

This means that you can automatically open images, PDFs, or MSWord files, in their respective application for editing. When finished working on them, they can be easily checked-in right from within Content Station.

This feature is only available in Content Station AIR (not in Content Station Web).

6.1 Configuration Settings

In order for this feature to work, your administrator will have configured your desktop system accordingly. By double-clicking on the approriate content icon the object should open up automatically into the correct aplcation installed on your desktop. A copy of the file opened is also copied to your local computer for editing.

6.2 Checking - Out content

To check-out a file and open it for editing in the appropriate application, do the following:

Step 1. Locate one or more files to be checkedout by using any of the Search applications or by opening the Dossier in which the file is saved to.
Step 2. Use one of the following methods:

For opening individual files:

- **Double-click** the file.
- **Right-click the file** and choose Open from the context menu.

For opening multiple files:

- **Right-click** a file and choose Open from the context menu.

The following actions take place:

1. Each file is downloaded from the Enterprise system and stored locally. on the users computer.
2. Each file is checked-out of the Enterprise system.
3. The application with which each file can be edited is opened.
4. Each file is opened for editing in its appropriate application.
5. A page titled "Checked-out" is displayed in Content Station AIR, listing all files that are currently checked-out by you.

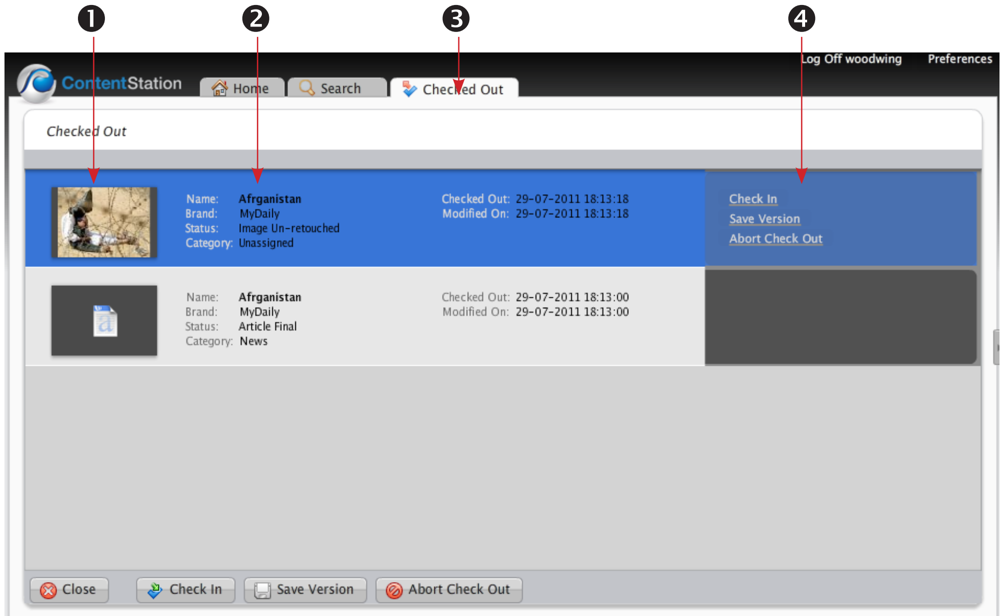
6.3 The Checked-Out content

When checking out a file, a new page named **Checked-out** is displayed in Content Station AIR showing all files that you have currently checked out. Each file is listed in the order in which it has been checked out, with the most recently checked-out file listed at the top.

For each file, the following information and options are available (*see figure 7*):

- **Thumbnail (❶)**. A preview of the file or when no preview is available the application icon for that file type. Double-clicking the preview will open the image.
- **File information (❷).** File name, Brand name, Status, and Category.
- **Management controls (❹)**. Check In, Save Version, Abort Check Out, and Close buttons.
- **Checked-Out tab (❸).** Will remain open until all files are checked bac into Enterprise.

The Checked-out page cannot be closed until all listed files have been checked in to the system.



When trying to close or log out of Content Station AIR while the Checked-out page still contains files, a message appears:

Respond to the message as follows:

- Click **No** to close the message and return to Content Station AIR without logging out.
- Click **Yes** to close the message and log out of Content Station AIR. When next logging in to Content Station AIR, the Checked-out page will be available and showing all currently checkedout files.

6.4 Editing Checked-out Files

When editing a checked-out file and subsequently saving that change, the change is saved locally on your computer.

It is important to be aware of these changes because the local file is now different from the original file in the Enterprise system. In order to update the original file, use either the **Check In** *or* **Save Version** *buttons.*

6.5 Managing Checked-out Files

For files that have been checked-out, the following management options exist:

- **Check In**. For checking-in the file to the Enterprise system.
- **Save Version**. For saving a version of the file to the Enterprise system.
- **Abort Check-out.** For closing the file without saving any last-made changes.
- **Close**. For quickly closing a checked-out file. Content Station will automatically determine whether the file should be checked in or if an abort checkout action should be performed.

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6.6 Check-In files

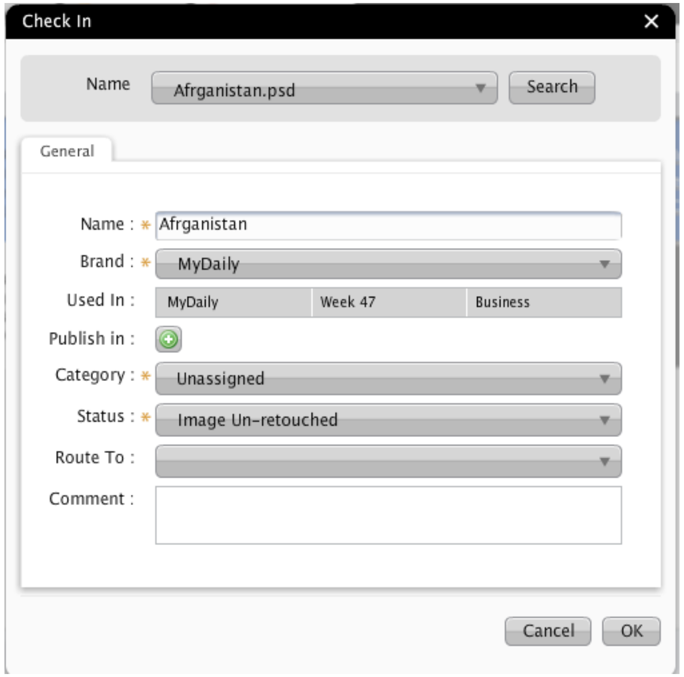
To check-in a checked-out file in the regular way, do the following:

Step 1. On the Checked-out page, select one or more files that need to be checked in.

Step 2. Do one of the following:

- Click the **Check In** button for any of the selected files.
- Click the **Check In** button at the bottom of the page.

The Check In dialog box appears, see below.



In case a file exists multiple times with the same name but with different extensions (for instance images that have been saved in different file formats), each file is listed in the Name list at the top of the dialog box, with the last modified file listed first.

Hover the mouse pointer over the Name list to display the full path of the file in a tooltip.

Step 3. (Optional) Do one of the following:

- From the Name list, choose the file that should be checked in.

When the checked-out file is available in multiple file formats, the format it was last saved in will be preselected. This is especially useful when you for example have converted a file from .jpg to a .psd. As you probably want to check in this new format, this file is preselected for you. (The original file can still be chosen from the list, in case you want to check in that file instead.)

- If a different file than the original one needs to be checked in, click Search to browse to that file.

Step 4. Fill in the required information for Name, Brand, Editions, Catagory/Section, Status, Route to and comments as required.

Click **OK.**

The following actions take place:

- The file is saved to the Enterprise system.
- If multiple files were selected, a new Check In dialog box appears for each file until all files have been checked in. Repeat steps for each file.
- In the area where the Check In, Save Version, and Abort Check Out buttons are located for the file, a spinner animation is displayed.
- The checked-out file and any versions saved as a result of performing a Save Version action are automatically deleted.
- If multiple files are present with the same name but in different file formats, the Delete Files window will appear. By default, all files are selected. Clear the check boxes for those files that should not be deleted. Click OK to close the window and delete the files.
- If all checked-out files listed on the Checked-out page are now checked-in, the Checked-out page is removed.

The file(s) are uploaded in a three-step process,

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as indicated by the progress screens that appear:

1. **Preparation**. The file(s) are prepared for upload.
2. **Uploading**. The file(s) are being uploaded. A progress bar together with the currently uploaded file size so far is displayed during this step.
3. **Processing**. The uploaded file(s) are processed by the server (such as the creation of a preview of the file).

6.7 Save Version

The Save Version action is used to save an intermediate version of the file to the Enterprise system. (This action can be performed at any time, the file does not have to be open for editing. If the file is opened for editing though, it will stay opened.)

Saving a version of a checked-out file can be done in the following way:

- Regular Save Version. This is the normal way of saving a version; you will have full control over the settings involved in the process. This behaves the same way as Check-In, (*see 6.6*)

6.8 Abort Check-out

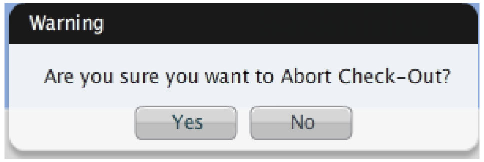
The Abort checkout action closes a checked-out file without saving any made changes. The file will be returned to the state it was in when it was checked-out or a last version was saved.

Performing an abort checkout action on a checked-out file can be done in the following way:

- **Abort Checkout**. This is the normal way of performing an abort checkout action on a checked-out file; you will have full control over the settings involved in the process.

A message appears, asking to confirm the action:

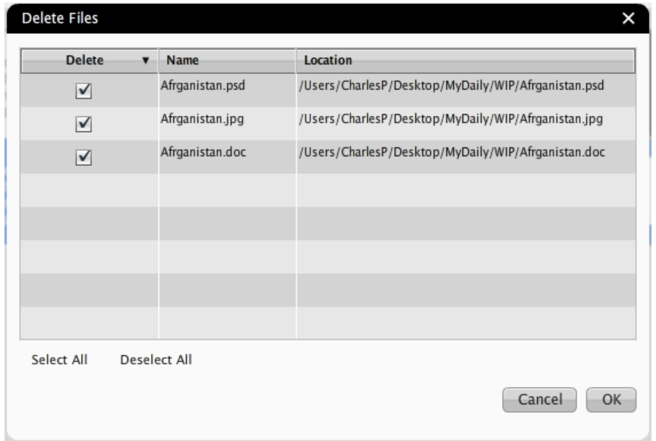
A message appears when using the Abort Checkout option



Step 1. Do one of the following:

- Click **No** to close the message and not close the file.
- Click **Yes** to return the file to the Enterprise system without saving any lastmade changes.

In case Yes is chosen, the following actions take place:
The Delete Files window appears:



The Delete Files window lists the following files:

The original checked-out file Any files saved as a result of performing a Save Version action

Step 2. Do the following:
Step 3. Clear any of the Delete check boxes for the files that should not be deleted.
Step 4. Leave the Delete check boxes checked for the files that should be

deleted.
Step 5. Click OK.

The following actions take place:
- The selected files are deleted from the system.
- If the Checked-out page does not have any more files listed as a result of this action, the Checked-out page is removed.

6.9 Close

The Close action can be used to quickly close a checked out file. Content Station will automatically verify the state of the file and perform one of the following scenarios:
- **File has been updated**. When the content of the file has changed, a check-in action will be performed.
- **File has not been updated.** When the content of the file has not changed, an abort checkout action will be performed.

Performing a close action on a checked-out file can be done in the following way:

Step 1. On the Checked-out page, select one or more files.
Step 2. Click the Close close button at the bottom of the page.

The following actions take place:
- If the content of the file has changed, the file will be checked-in, as described previously in Check-In.
- If the content of the file has not changed, an Abort Checkout action is performed.