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EngageOne Content Author

Primer

Version 6.6 Service Pack 11 R1

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1 - Content Author Primer

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Content Author: introduction

Content Author is an optional module of the Designer environment that allows key parts of publication content to be created, maintained and deployed independently of the main publication design. This type of content is known as a message and consists of text and graphics, formatted within a predefined message area representing reserved space within a publication design. Content Author provides an email based workflow environment for reviewing and approving such messages prior to implementation.

System components

There are two main components that Content Author participants work with:

The Content Author itself is a web browser client that allows authors to create and maintain actual message content. Once an author has submitted a message to the approval process reviewers then also use this client to access the new or amended content. It contains the Content Editor, which is where the messages are actually created.

The Content Author Administrator is a Windows desktop program that allows designated administrators to specify and control the Content Author environment and to coordinate its interaction with the main Designer modules.

In addition, the system also uses a number of services that provide the infrastructure and communication for the Content Author environment including the repository. Refer to the Release Notes for details.

Users and roles

People who need to work with the Content Author environment need to be registered as users and can be assigned one or more roles to indicate their participation rights within the system. Users can also be part of a group which is a list of users that share the same roles. Groups can be used to simplify access control rights for projects and folders where there are many users involved.

> **Note:** Individual users are assigned default roles but these may be supplemented with additional authority if they are added to specific groups.

Administrators are responsible for configuring the Content Author environment and ensuring it is compatible with the Designer publications for which messages are intended. An administrator assigns roles and access rights for other users, defines the controls that manage size, style and function available to authors, and configures the previews that allow users to see how their messages will look within actual production documents. An administrator will also determine when and how new or updated messages are sent tothe production system.

Project administrators are responsible for administering specific projects – specifying users and groups and controlling the message workflow within these projects. They can work on projects they have created and those to which they have been assigned by the administrator.

Authors use the Content Editor client to create and maintain the actual message content and submit changes for review and approval.

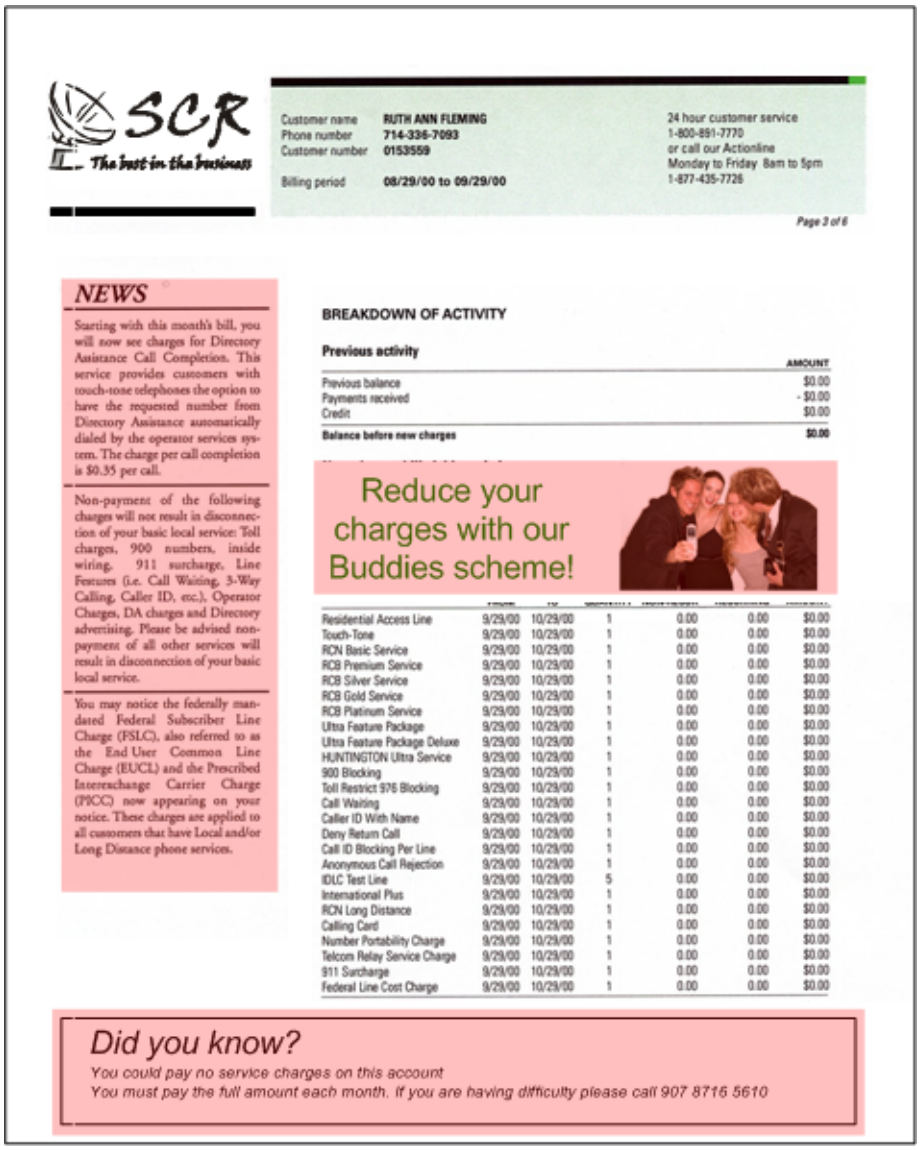
Reviewers are users who have authority to approve or reject new or amended messages prior to their inclusion in the production system. They also use the Content Editor client.

Readers use the Content Editor client to view message content that has been created by authors. They are not able to make any changes to it.

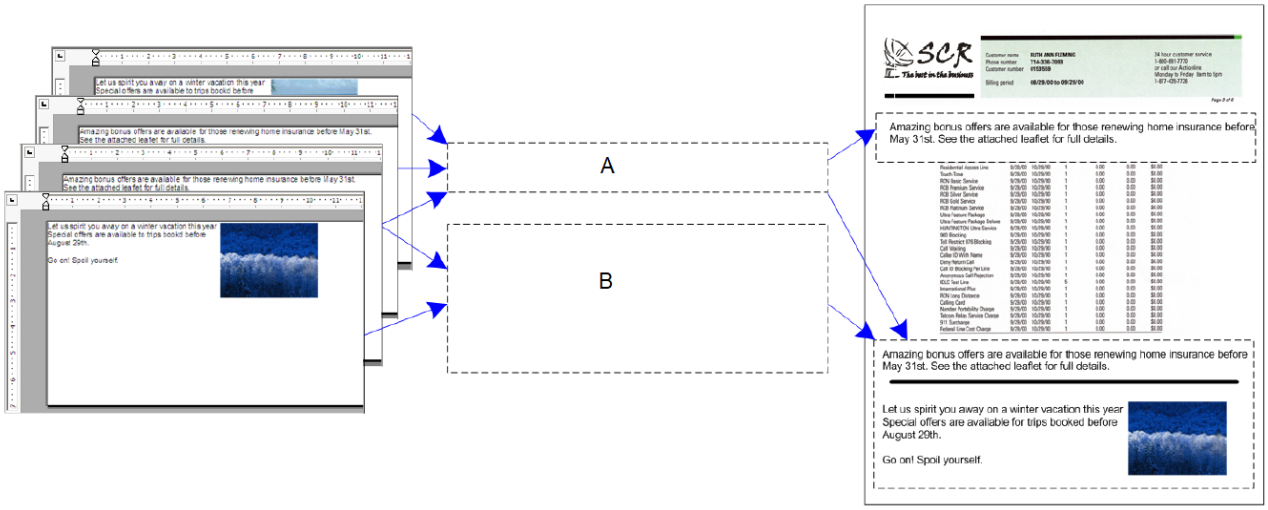
Messages and message areas

A message is a segment of page content intended to be placed within documents composed by Designer. Messages can contain text and graphics, make use of variable data available to the production system (where this is permitted by the administrator) and have conditions assigned to determine the circumstances in which they should be included or excluded in a document. They can signal that specific actions are taken by Generate when they are placed on the page (again when permitted by the administrator). New and amended messages must be reviewed and approved before they are made available to the production system.

Typical uses of messages (highlighted) within an actual document design:



Using the Content Author, messages are laid out within *message areas*. Message areas represent reserved space on document page designs within which messages are scheduled for inclusion. They can be thought of as rectangles that define the maximum size of the content you can work with. In the production system multiple messages can appear in the same area provided there is enough vertical space.



Key:

- A: Area 1: “Priority Messages”
- B: Area 2: "Secondary Messages"

Within the main Designer, message areas are associated with specific parts of a page layout using a message box. Message boxes are typically assigned to handle one particular message area, but it is possible to assign multiple areas to a single box if required. Message areas can also be inserted directly into the main flow of the page as a message stream.

Depending on the document design, there may be one or many message boxes on the same page or spread across multiple pages. If required, the same message area can be scheduled for multiple boxes to allow its messages more opportunities to be placed. In these circumstances, individual messages will still only appear once per document by default but an optional message area setting can allow them to appear in multiple boxes if appropriate.

Where multiple messages compete for the available space in a message box, Content Author will select those to be placed according to their priority. If multiple message areas are assigned to the same message box, the messages scheduled for all areas are treated as a single list for the purposes of prioritization.

> **Note:** There may be several factors that determine if a message is included in individual documents. see Ref_“understanding message selection criteria” on page 9 for details.

Projects and folders

A project is the highest level grouping for messages and is typically used to organize them according to the main Designer publications to which they relate. For example, you might have projects for “Travel Insurance Renewals” or “Savings Account Statements”.

Within such projects will be one or more folders to contain the actual messages. Folders typically group messages according to the same theme or project phase. For example, you might have folders for "Loyalty Scheme" or "Winter Campaign".

Design resources and domains

The messages that are created using Content Author will eventually appear in the context of an overall Designer publication so it is important that Authors only use resources that are appropriate to the publication design.

The font and image resources that are available for use by message authors must be specifically added to the system by an administrator. As well as ensuring consistency with publication designs it also allows control over the printer/browser resources that need to be created for use with the production environment.

Data fields are links to values provided by the main publication design which can be inserted into messages. These will typically provide variables such as customer name, date of birth, and so on and are often linked directly to fields in the main input file used by the production system. An administrator will need to ensure that each data field defined in the Content Author environment is linked with the relevant data in the main publication design.

Conditions are criteria that can be applied to messages to determine when they should be included (or specifically excluded) from particular documents. They are always based on testing the values in a data field.

Languages can also be used as part of the selection criteria to determine if a message should be included in or excluded from a document when it is published by comparing the locale of a document.

Feature sets can be used to restrict the use of certain format and drawing options available to an author when designing a message. By default, all editor features are available for use with a message. Features can be restricted globally or via a domain.

By default, all design resources including actual message areas are assumed to be applicable to all messages. This may be suitable for situations where all messages are intended for use with a single publication design. Where Content Author needs to interact with multiple publication designs or where

particular types of messages require different constraints an administrator you will use a domain to apply specific controls to a project or folder.

Workflow

Messages are created within a project/folder structure which is used by administrators to associate messages with a particular publication and for activating specific sets of messages for a particular period or application. Messages must also be associated with a specific message area and authors may have access to several areas for use in one or many publication designs. For these reasons it is vital that administrators make sure authors understand the projects and publications for which they are creating content.

Before authors can start creating messages, the administrator must also make sure that all the resources and controls required by a particular application – message areas, fonts, images, data fields, conditions and so on – have been created and, if required, made available to the relevant project or folders via a domain.

Once an author has created a new message it must be submitted for review and be approved by the relevant review groups before it can be used in production. The administrator defines the users that form individual review groups and assigns these groups to particular projects or folders using the review cycle settings. The actual review cycle takes place sequentially with each group of reviewers in the chain being notified via email. Messages that are waiting for you to review are shown in the Reviewer tab when you next log in. Each reviewer can choose to approve or deny the message. If a reviewer denies a message the review cycle is stopped and the author is informed by email. If the message is later resubmitted the complete review cycle starts again. If required, an administrator can choose to bypass a particular reviewer or force a message in review to be denied. Readers are able to view messages at any stage of the workflow.

The administrator makes approved messages available for use with the production system using the Message Publishing function. This is initiated on-demand and can include any segment of currently approved messages from an entire project to a single message.

Understanding message selection criteria

In the production environment multiple layers of criteria may be used to determine which messages should actually be included in a particular publication. The following list indicates the sequence in which these criteria are applied.

Is the relevant message area active?

Messages are associated with message areas, which in turn are mapped to message boxes in a Designer publication design. Unless the relevant message area has been associated with a message box, its messages cannot be considered for inclusion.

Is the language attribute matched?

Each message can have a *language* attribute and such languages must match the language of the active locale within the Designer system to be considered for inclusion. A message is not, by default, associated with a language.

Is the date range current?

You can optionally specify *effective dates* a for each message. A message will not be selected if the Campaign Date specified to the production system is outside the specified range.

Are all conditions satisfied?

Messages may be specifically included or excluded by conditions that are assigned to them.

Has the sample rate been exceeded?

You can specify the maximum number of times a specific message is to be used during a single production run. Once exceeded, the message is no longer considered for inclusion in subsequent publications produced by the same run.

Is there enough room in the message area?

Where multiple messages are still scheduled for inclusion after all other criteria have been considered, messages will be selected according to their priority. Where there is insufficient room for all messages, those with a lower priority will be excluded.

2 - Glossary

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Glossary

Administration client

A Windows desktop program that allows administrators to create the objects that define and control the Content Author environment and its interaction with the main Designer modules.

administrator

Responsible for configuring and managing the Content Author environment and ensuring it is compatible with the Designer publications for which messages are intended.

attachment

A message that is linked to another 'parent' message, and will be automatically included for publication with the parent message, subject to the usual selection criteria. A message can have any number of attachments, and many messages can have the same attachment.

audit trail

A file produced by Generate to keep a track of which Content Author messages were included in particular documents produced by the production runs.

author

Uses the Content Editor client to create and maintain message content and submit changes for review and approval.

Content Author

A web browser client that allows authors and reviewers to create and prepare messages for the production environment.

Content Editor

This is where the actual messages that will appear within document pages are designed. It includes standard text editor features plus some tools that deal specifically with messages. It is a component part of the Content Author and is an ActiveX control that you will be asked to install the first time you run Content Author.

database

This is the part of the Content Author repository that provides revision control.

Designer

The Designer consists of the design editors and production tools plus a repository within which all design resources are managed.

DOC1 Generate

See **Generate**.

domain

Sets constraints on messages style and usage. Can be assigned to both projects and folders.

editor

See **Content Author** and **Content Editor**.

EngageOne®

EngageOne is an interactive document production system, which enables the creation and delivery of ad hoc customer correspondence.

environment file

This contains Content Author configuration information such as message areas and data fields, and is required when designing messages in Designer. The environment file is created as an XML file. This file must be available before messages can be used in a Designer publication.

folder

See **project folder**.

FTP

File Transfer Protocol – used to send data between different machines.

Generate

This is the batch program that processes production jobs on your host system. This is the main production engine responsible for processing the Designer publications and producing the actual output datastream.

HIM file

See **messages file**.

HIP file

Contains all the information required to publish a Designer publication in the production environment, such as layout, formatting, resources. It is created when the publication is published in the Designer.

message

An object which can contain text and images with associated attributes created by a Content Author author.

message area

An area of a specified size within which messages are created.

message box

An object used in identifying an area in the document layout into which messages will be placed.

messages file

This contains messages and resources for a given project folder that have been extracted for publication to the production environment. When publishing to Generate, its default extension is .HIM; when publishing to EngageOne®, it is a zip file. It is also used when proofing messages.

message stream

Allows messages to be inserted directly into the main flow of the page in the Designer publication.

project

This contains one or more project folders.

project administrator

Responsible for configuring and managing specific projects.

project folder

A particular phase of a marketing theme in a project. This is where messages are created.

reader

This read-only role uses the Content Editor client to view message content that has been created by authors. They are not able to make any changes to it.

repository

This stores and provides revision control for all the design resources and other objects that are used in the Content Author, including resources that are created within Content Author itself or have been imported into it from an external source.

resources

These are the objects that are made available to authors for use with messages content or control. They consist of message areas, fonts, images, data fields and conditions and priorities.

They are included automatically in the messages file when publishing.

reviewer

Users of the Content Editor client with the authority to approve or reject new or amended messages prior to their inclusion in the production system.

sample data file

A representative extract of the input data that the is used in a Designer publication.

signal

A signal is applied to a message and indicates that a specific sequence of Designer actions must be performed when that message is placed in a document.

SQL

Structured Query Language. A special language used by databases to retrieve and edit data with a database.

units of measure

Units of measure – the units in which measurements will be shown.

UOM

See **units of measure**.

zip file

See **messages file**.

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1700 District Ave Ste 300
Burlington MA 01803-5231
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