CE Admin User Guide

Quark CONTENT ENABLEMENT

2021/06/08

Contents

Introduction

Quark® Content Enablement Platform™ is a fully integrated, unified content platform for collaborative workgroups. This Guide provides a high-level introduction to the Quark Content Enablement Platform and its various sections i.e., CE Admin, CE Author, CE Workspace. You can use this User Guide to learn more about each feature of the current version of this platform and how you can use it to work for you.

The complete user guide for Content Enablement Platform is available into three separate documents, i.e.

1. **CE Admin**
2. **CE Author**
3. **CE Workspace**

About Quark Content Enablement Platform

Quark Content Enablement Platform is a highly configurable solution for automating the content life cycle according to your business process so that approved content can be published and distributed to multiple channels and formats. Quark Content Enablement Platform is built as per the requirements of both authors and admins of the platform, who needed a managed author sections with well-configured dashboards for the Admin and the Workspace section inside the platform.

The Quark CE Platform consists of a set of three core modules that can be combined in specified ways to provide a consistent output of the content through the system. Also, it can also be integrated with third-party systems as well to accommodate a wide range of modern enterprise content enablement requirements.

Platform capabilities can be described in terms of content creation, management, publishing, and delivery.

Create

The Quark Content Enablement Platform lets you:

- Design professional and personal content templates for different publications and formats.
- Provides structured content editor with close resemblance to Microsoft Word and Google Docs environment.
- Asset integration from databases with other forms of contents.

Manage

The Quark Content Enablement Platform provides:

- Workflow and collaboration tools
- Task and update notifications
- Component management
- Automated checks
- Version control

Publish

With the Quark Content Enablement Platform, you can

- Automatically assemble components of various types from various sources into sophisticated layouts
- Automatically publish those layouts in a variety of formats to a variety of devices or systems

Deliver

The features built into the Quark Content Enablement Platform make it easy for you to deliver content in both public and secure environments according to customer requirements.

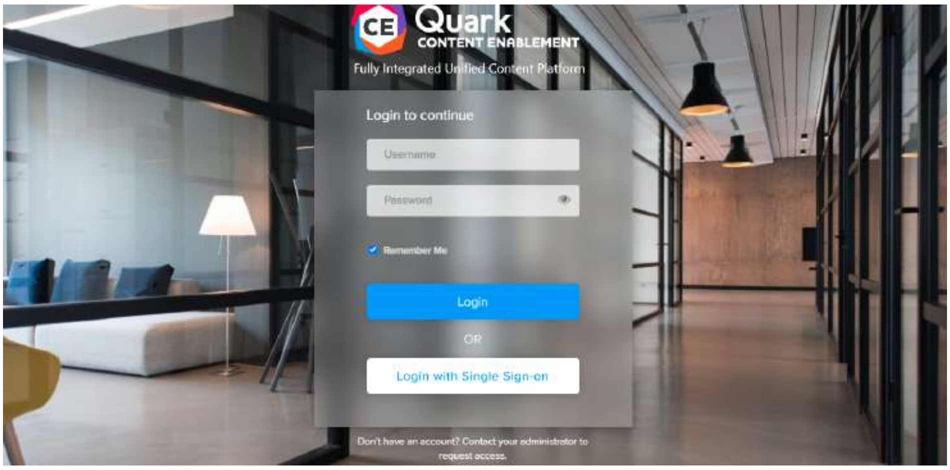
Login into the Product

You must login to a Quark Content Enablement Platform Server to access any of its features and assets residing on that server.

The Login page appears at the start when you launch the product page for the first time through the URL:

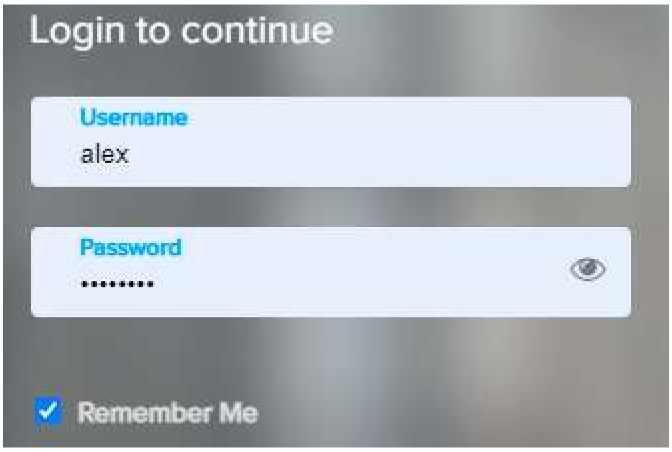
https://<SERVER-URL>*/auth/login*

The users login through the Quark Content Enablement Platform welcome screen that displays on the Internet browser window when the user enters the correct URL.



Following are the constraints for the login into the Quark Content Enablement Platform:

- The values to be entered in the Username and Password field are defined for each user by the Quark Content Enablement Platform administrator. For the Quark Content Enablement Platform sites that use Lightweight Directory Application Protocol (LDAP) to manage user lists, Quark Content Enablement Platform users login with their network user names and passwords.
- To automatically enter your user name and password the next time you login, check 'Remember Me'.


Login to continue
Username
alex
Password
Remember Me

Admin Introduction

As an administrator, a user can change the system level as well as content level settings, to maintain the workflow for all the internal workings of the platform. A user with administrative privileges can configure as well as reconfigure all the properties within the system.

The designated control panel or admin panel in the application is subdivided into 7 panes, each giving access to different control sets. An admin account controls user settings, roles, privileges, metadata, workflow, and customizes the content types, properties, and storage options as well. To access the admin ca panel, one has to navigate to the following URL:

https://<SERVER-URL>

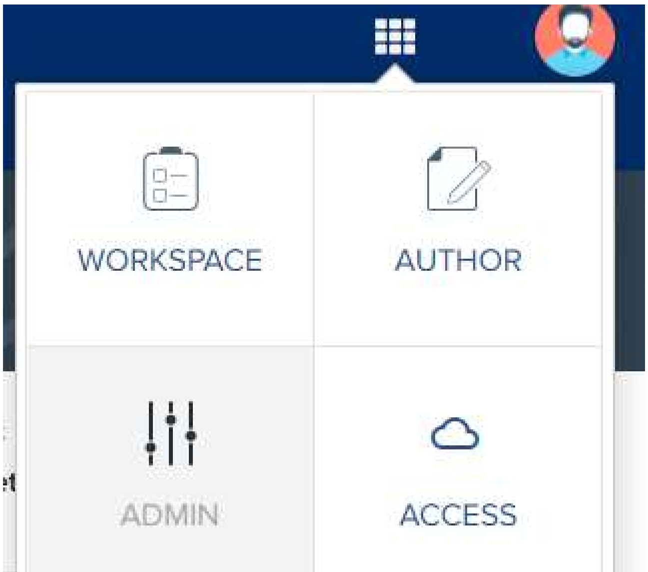
After that you have to login as mentioned earlier in the guide, then click the menu in the top right corner to access the admin from navigation options.

Alternatively, a user can go to the following URL after logging in as well:

https://<SERVER-URL>/admin/

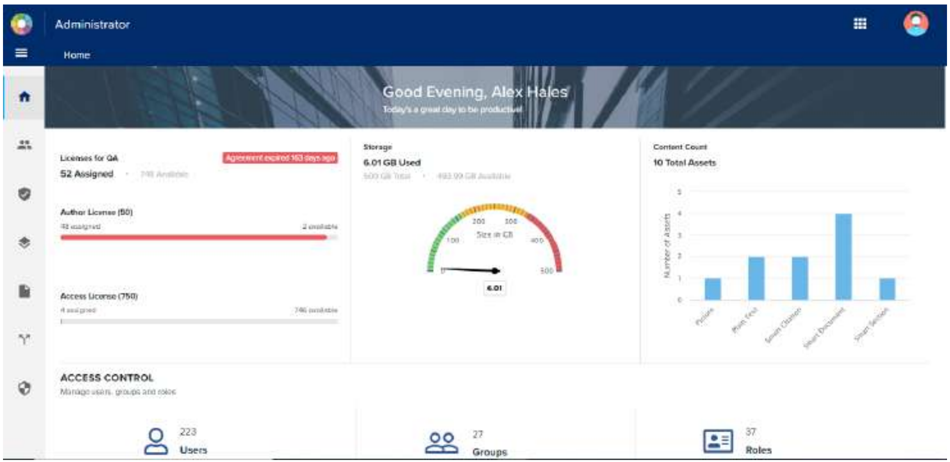
After accessing the admin panel, the administrator homepage is the first page to appear and the user can access other pages from the left navigation panel itself.

A detailed description of each page is given in the following sections.



Homepage

The admin home contains different statistics to check the productivity as well as different controls to modify the most common settings of the app. The top of the page denotes which specific page is being accessed right now along with the back and navigation menu minimize/ maximize button. The page also shows the profile name, image, and a logout button in the top right corner of the page.



The layout of the homepage is divided into 5 subparts, described in detail in the following sections.

Statistics

The first section on the administrator panel home shows some statistics of the currently accessed account. These statistics give insight to system preferences and the productivity of the users. These are finely divided among 3 categories as follows:

Licenses

The ‘Licenses’ category on the admin home accesses real-time data from the backed to provide you with assigned and unassigned licenses. The top of the panel signifies the tenure of your registration agreement with its status, i.e, active or expired. The Content Count panel shows the number of both assigned and unassigned licenses. After that there can be seen 2 bars with titles: Author License and Access License, which depicts how many of each type of licenses have been assigned:

1. **Author License:** This license allows a user to create or edit content in the Author, Workspace, Admin section as per privileges set in the platform.
2. **Access License:** This license allows user to access the Content Management/Access portal

These licenses help the admin to keep checks and balances of each account.

Storage

The storage category of the admin home signifies and shows how much bandwidth has been allocated to a particular account. It also shows how much data is currently being stored in the current account out of the allocated storage.

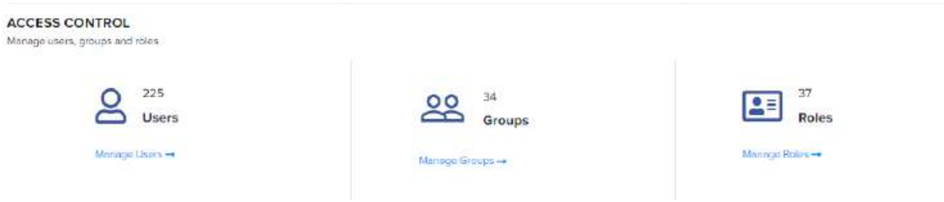
The UI can be seen as a meter with size in GB of storage available. The pin notifies the quantity of data that is currently stored in cloud in comparison to the total capacity.

Content Count

The content count is a graphical representation of all the content types currently being stored in the system. It shows all the contents according to their types as well as the number of assets of that current content type stored inside the system.

Access Control

The access control helps an administrator to check which entities are stored in the system and which roles have been assigned to them



There are 3 types of access controls that an admin can access in the Quark Content Enablement Platform, these are:

Users

Using this control, you can create a user profile, assign a role to them, provide a password and enable or disable the log-in process for the user. You can also use the controls to delete, rename or modify any user account. The Users are explained in detail in the next sections.

Groups

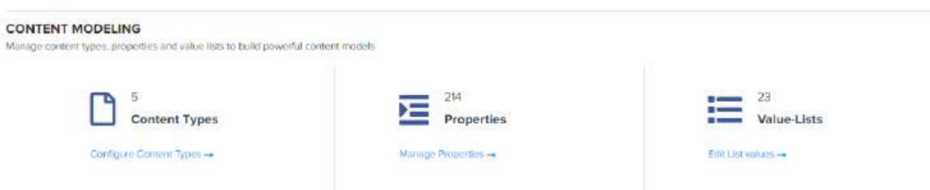
A user can use this option to control the creation of groups for routing the users into specified patterns. Privileges assigned to group will be automatically available to all the users which are part of the group. When an asset assignment is routed to a group, it will be visible to everyone in the group. The members of the group can delete, rename, and modify it. You may also assign a role in the group. After the role is assigned, all the group users will get the role, and they can avail themselves of the privileges attached to the role. The Groups are explained in greater detail in the further sections.

Roles

These controls are for creating, deleting, renaming, or modifying roles and the privileges associated with them. Read more at 'Quark Content Enablement Platform Privileges. Taking an example, the user may create a group and name it 'Editorial' and assign roles to the respective writers and editors. All the users with the given position are eligible for the same privileges for editorial function performances. The Roles are explained in greater detail in the upcoming sections.

Content Modeling

Content modeling refers to the content types and their associated properties linked within the Quark Content Enablement system. The content modeling further sub-divided into the following sections:



Content Types

This section indicates the high level categories of content type available and a link to navigate to Content Types UI

Properties

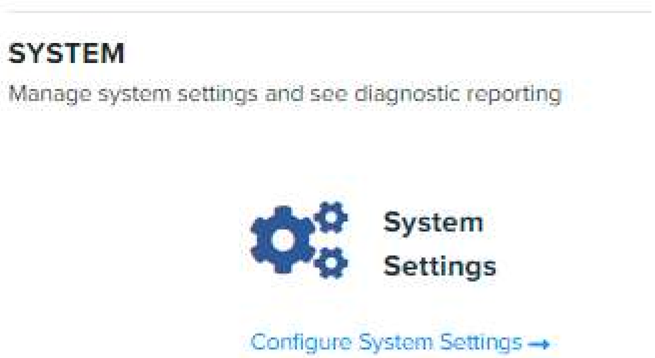
This section indicates the number of User Defined and Default Attributes present and a link to navigate to Meta Data UI to add, edit and delete properties. For better understanding, see ‘Defining Attributes.’

Workflow Management

In Quark Content Enablement terminology, a workflow is a set of steps that helps you to publish a document. You define workflows at the server level and then apply them to collections. This section indicates the number of workflow created in the system and a link to jump to Workflow UI where user can add, edit or delete workflows.

System

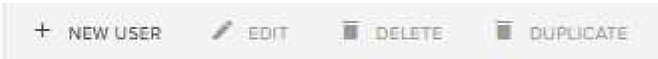
This section contains a link that allows user to navigate to Setting UI from where user can configure SAML login to Content Enablement Platform



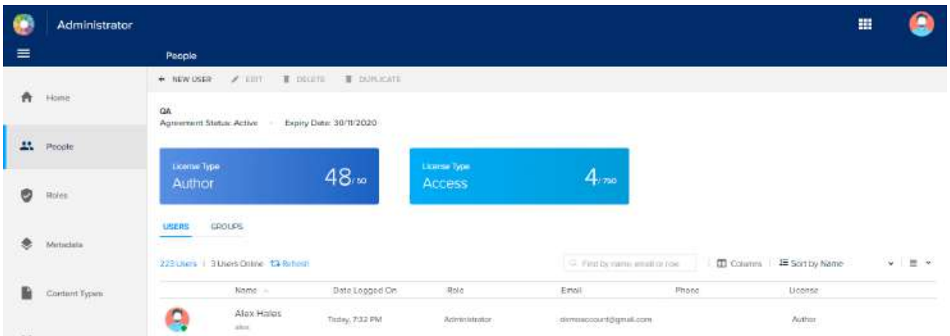
People

From this UI user can create, edit, delete or modify the users and groups. It shows all the details of the users, the total number of Users and Groups which are present. In addition to this, this UI also indicate which user is currently online. The User Interface of this page goes as follows:

The top of the page holds the subsection name with a toolbar just under it. The toolbar can be used to perform different operations on the users and groups.



Under the toolbar, the 2 cards denote the number of active Author and Access licenses respectively. We can further click on the cards



After it there are 2 lists which show all the registered users as well as groups within the system. The detailed information on each of these elements is given below:

Agreement Status

The agreement status shows if the current agreement of a user is still active or not, and if not then how many days it's overdue.

License Expiry Date

The license expiry date is shown in a small informative text just after the agreement status. It shows the last date till which your agreement with Quark Content Enablement Platform is going to be valid.

License Types

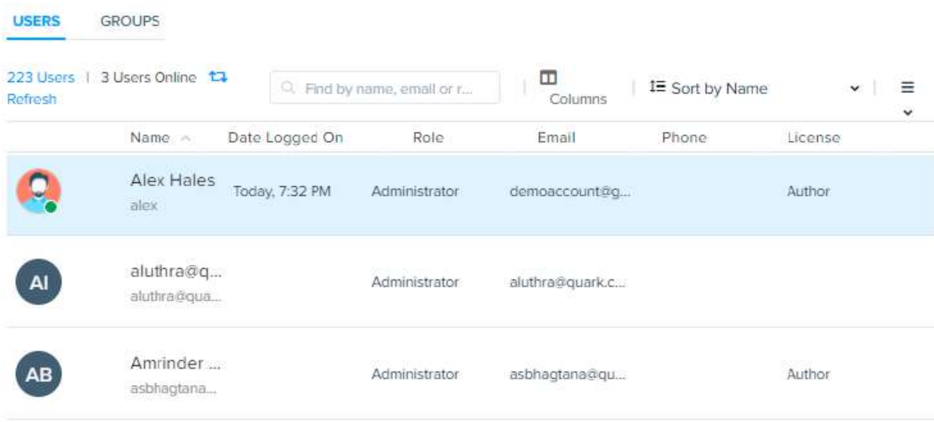
The cards indicate the type of the license and the current number of user to which the license is assigned compared to the total number of licenses purchased.

Users

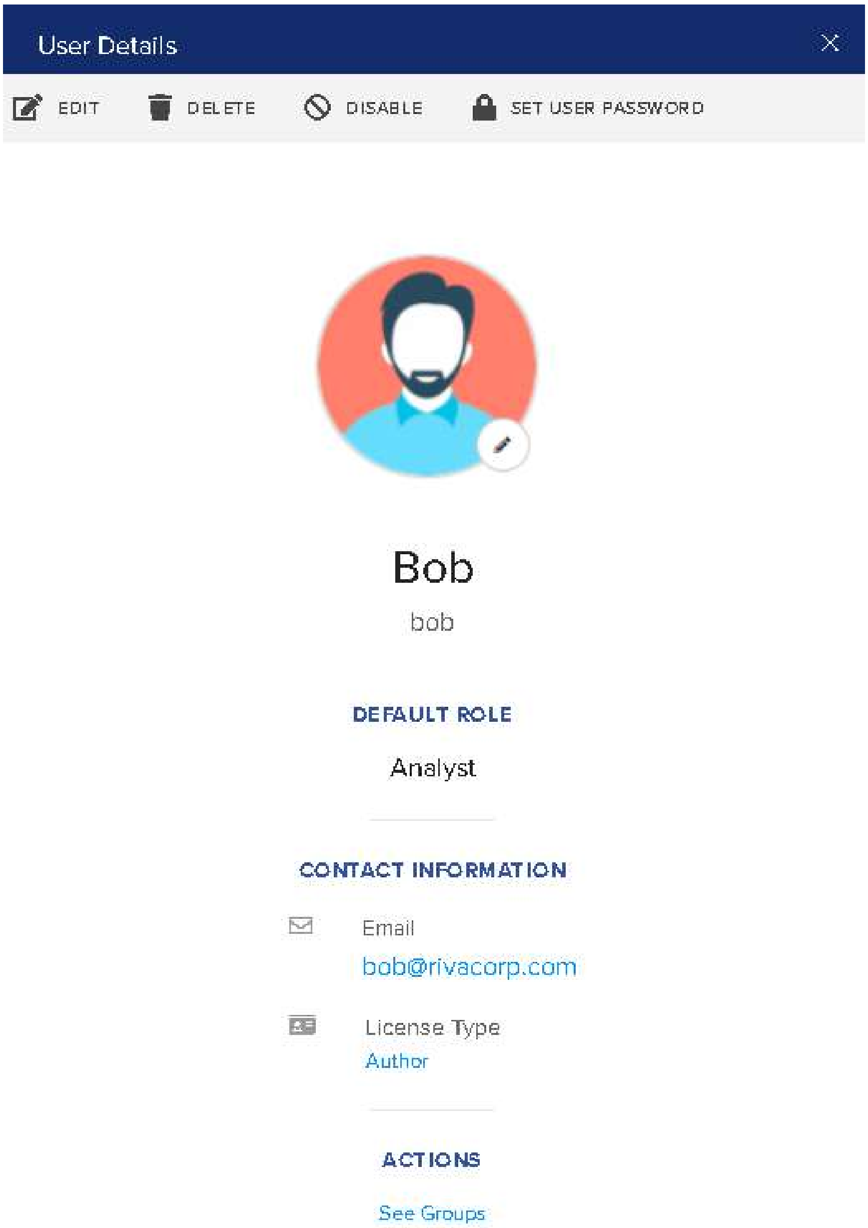
Users are the entities that can be given some kind of permissions to perform tasks in the platform using Roles. These users can play multiple roles from managing to writing content. The users can be created, deleted, or modified by admin-type members. These entities are listed in a tabular form on this page with some properties such as Name, Date Logged In, Role, Email, Phone, License. Also, a green dot appearing on the user indicates that he is currently logged on in system

User Details

As mentioned earlier, the users are shown in a list with some of their details as well. These details are properties that a user holds within its meta. We can change the visible columns in the table by adding or deleting which data one wants to see from users' properties. A toolbar on top of the list is helpful with this list as well. On the left, it shows how many total users are registered within the system and how many of those are online at this moment. It also has a refresh option to re-read the data from the system. On the right there are 4 options, Search for the specific user, add or delete columns, sort the list by name (ascending or descending) and change the view option respectively.



On clicking any user, user details of the user appear in the right drawer pane. Here we get options to Edit, Delete, Disable and Set User Password. It shows other details such as which license, role and group is being assigned to user.

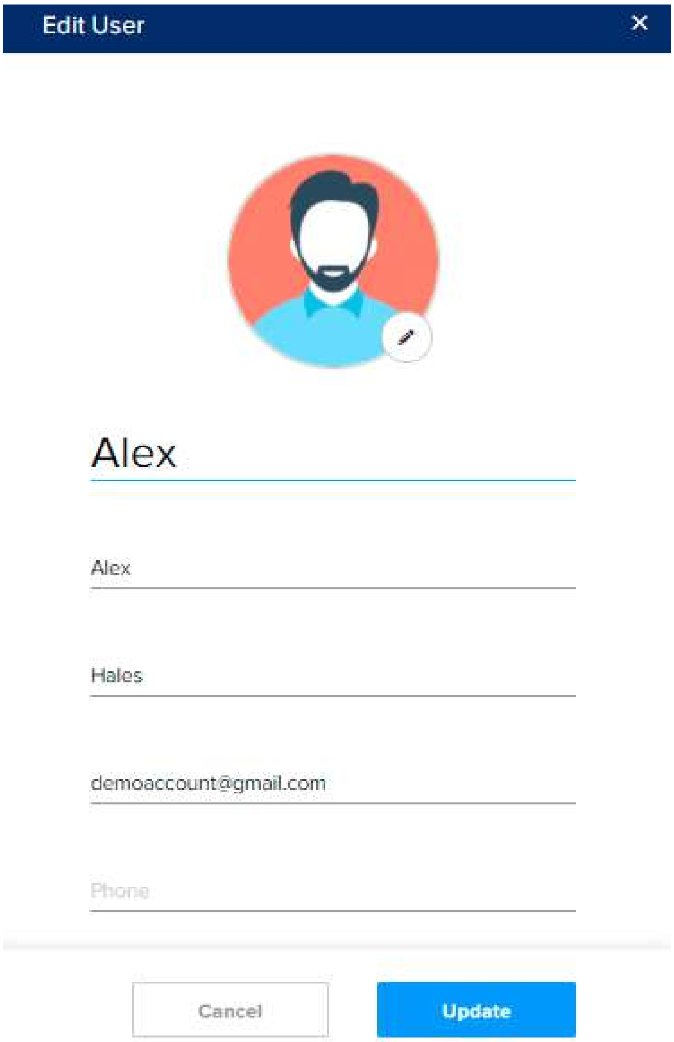


Operations

There are 4 different operations that an admin can perform in the user section. Their operations are described below:

Add New User- To add a new user, click the plus (+) icon with 'New User' written on it. Doing it will open a new form tab from the right of the screen. In the form, there are fields that have to be filled in to create the user. The fields are username, first name, last name, email address, phone, list of privileges to be given, and type of licenses assigned. Also, there's an option to add a profile pic for the same.

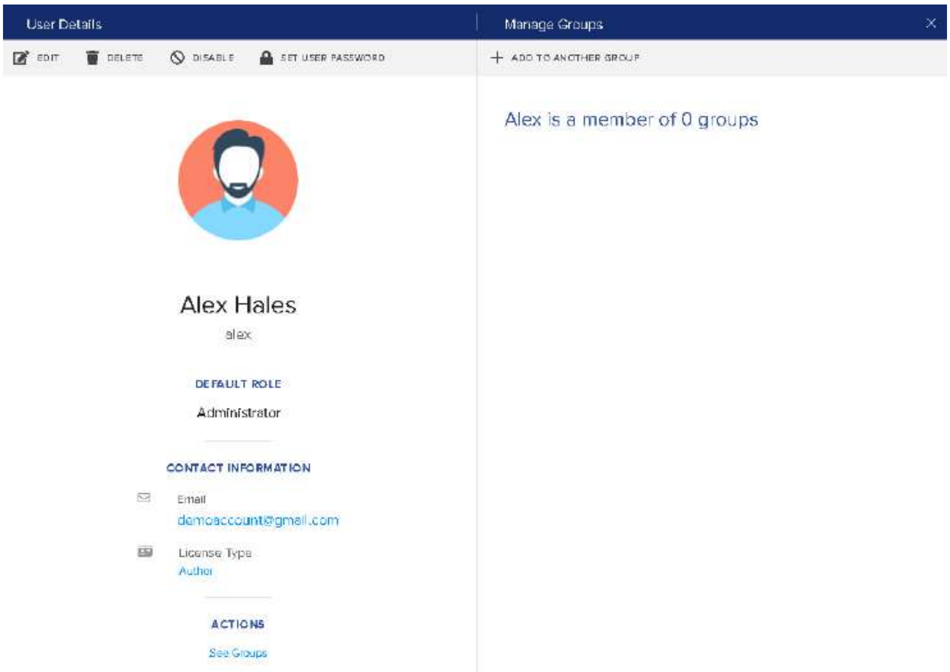
Edit User- The edit button on the top toolbar is inactive by default but it is enabled when you select the specific user. When clicked in it, the same form as 'add user' opens from the right, allowing the admin to change the same details which were entered at the time of creating that user.



Delete User- Delete User function is used to delete a specific user from the system itself, hence deleting all the data and metadata related to that specific entity.

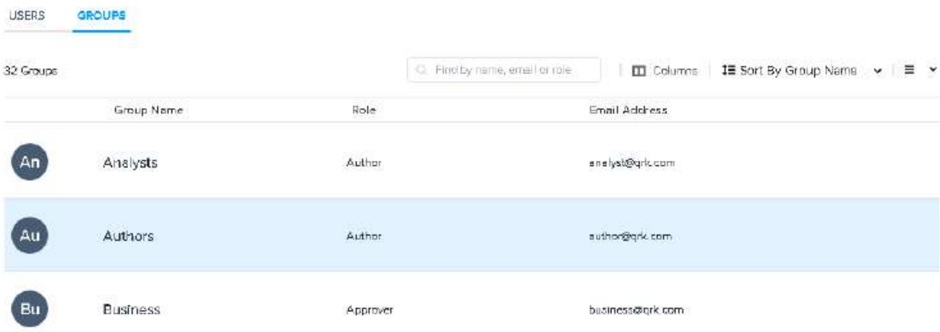
Duplicate User- As the same suggests, this feature is used to duplicate the existing user from the system to create a new user with similar properties and permissions as earlier.

Add User to Group- The user created can be added to group using 'See Groups' link which open another right pane showing the group membership of user and option ' + ADD TO ANOTHER GROUP'



Groups

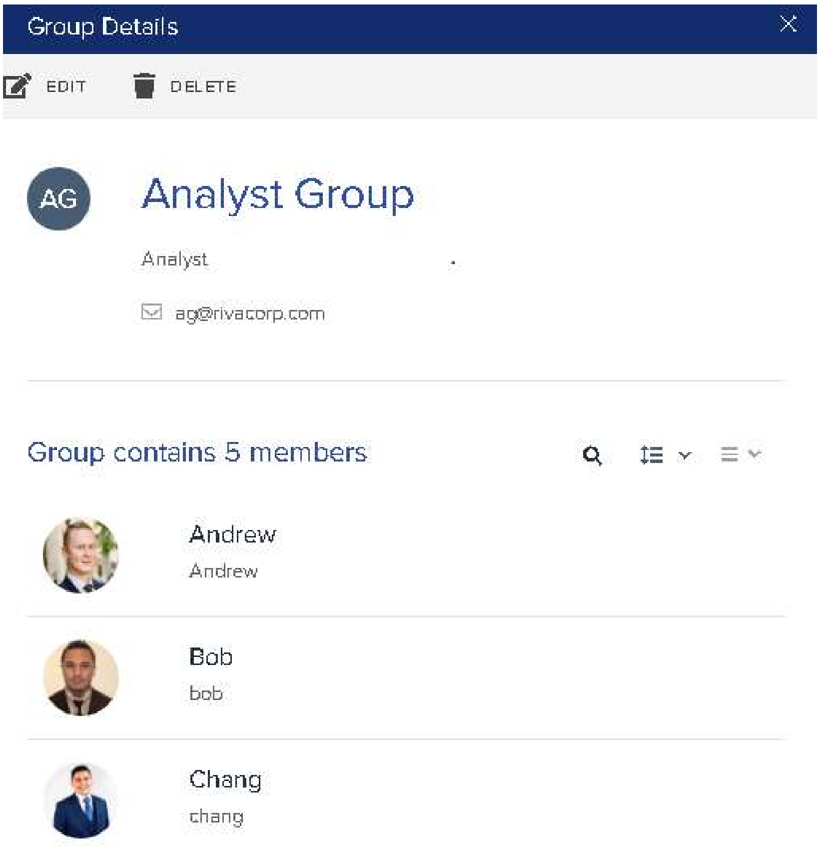
The groups are the collection of users who have the same traits or objectives to perform in the system. These groups are created to ease the task of providing an asset to a number of users at the same time.



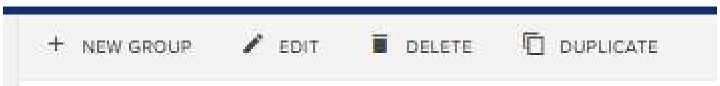
The UI of the groups is similar to the Users itself as it has the identical toolbar on top as well as the same pattern with the list. The rest of the details about these are given below.

Group Details

The groups are also shown in a list with some of their details as well. These details are properties that a user holds within its meta. We can change the visible columns in the table by adding or deleting which data one wants to see from groups' properties.



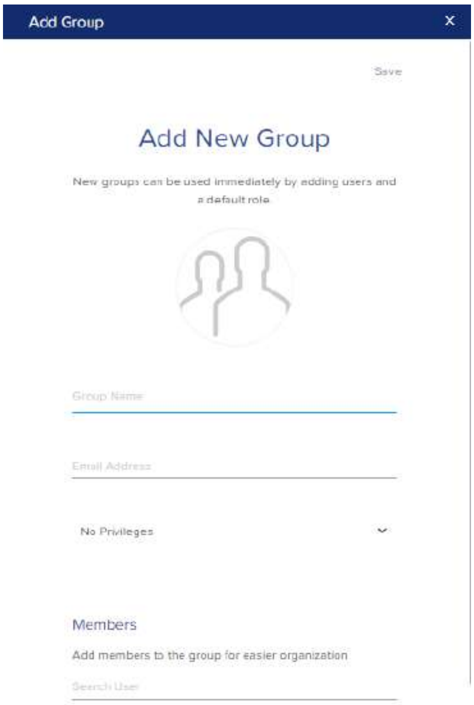
A toolbar on top of the list is also helpful with this list as well. On the left, it shows how many total groups have been created in the system. On the right there are the same 4 options as users, Search for the specific user, add or delete columns, sort the list by name (ascending or descending) and change the view option respectively.



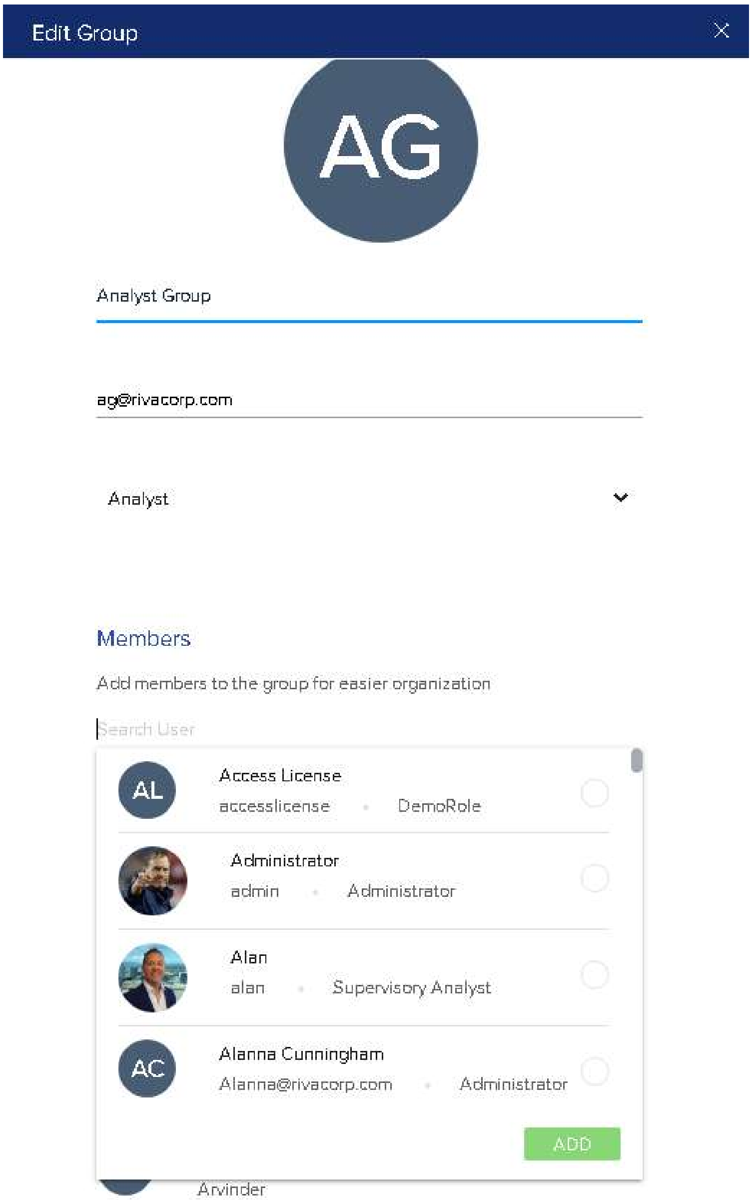
Operations

There are 4 different operations that an admin can perform in the user section. Their operations are described below:

Add New Group- To add a new group, click the plus (+) icon with 'New Group' written on it. Doing it will open a new form tab from the right of the screen. In the form, there are fields that have to be filled to create the group. The fields are group name, email address, list of privileges and users list.



Edit Group- The edit button on the top toolbar is inactive by default but it is enabled when you select the specific group. When clicked in it, the same form as 'add group' opens from the right, allowing the admin to change the same details which were entered at the time of creating that group.

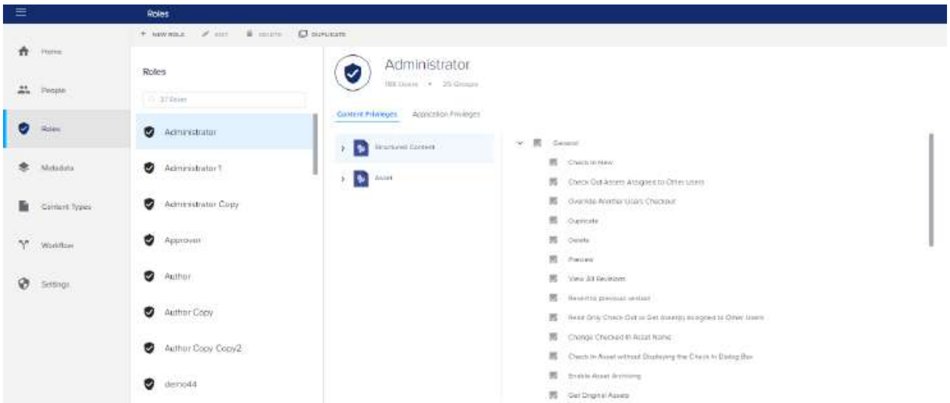


Delete Group- Delete Group function is used to delete a specific group from the system itself, hence deleting all the data related to that specific entity.

Duplicate Group- As the same suggests, this feature is used to duplicate the existing group from the system to create a new group with similar properties, permissions and members as earlier.

Roles

From the Roles section privileges can be assigned at Content or Application level. Roles allow an admin to generalize which permissions are to be given to a specific set of users in the system. There are 2 types of privileges list from which an admin can choose in each role. These will be covered in later sections.



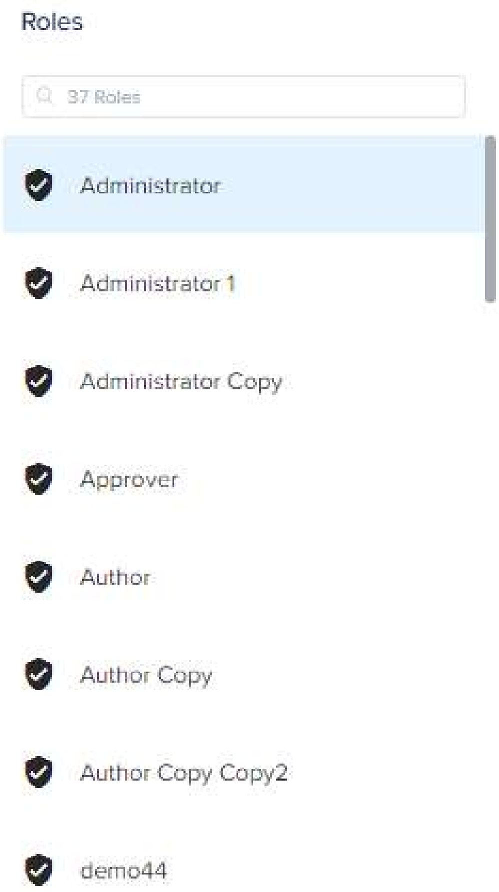
The UI consists of a 3 column layout. The first column represents all the existing roles in the system with a search option to search roles by name.

The second and third-row represent which type of privileges are there in the system to assign to the second and third columns.

There is also text on top of the second and third columns stating total users in the system and total groups that are assigned this role.

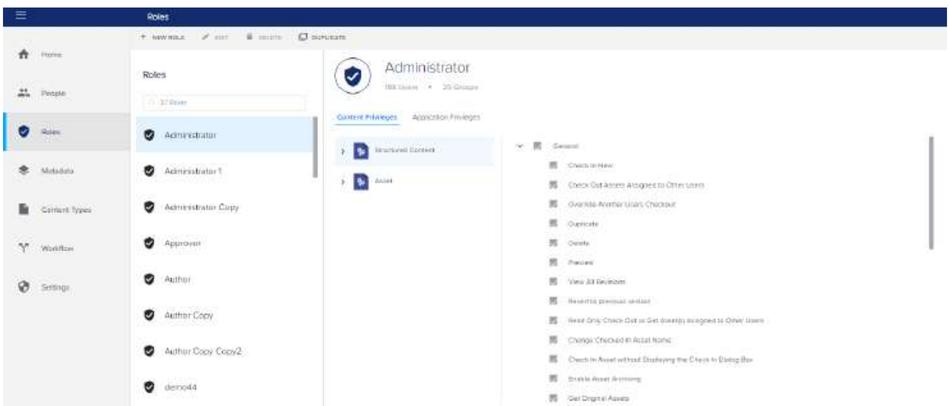
Role Details

Roles are defined as the definitive set of protocols and privileges that can be given to a specific user or group of users to help them control admin level or content level changes accordingly. The main point of this is that every user or group in the Quark platform must be part of at least one role.



Privileges

Privileges in the Quark Content Platform are essential as they provide a specific set of protocols to a user or group to perform some or other actions in the system. When an administrator specifies privileges for a role, it is defining the instructions available to each member of that role.

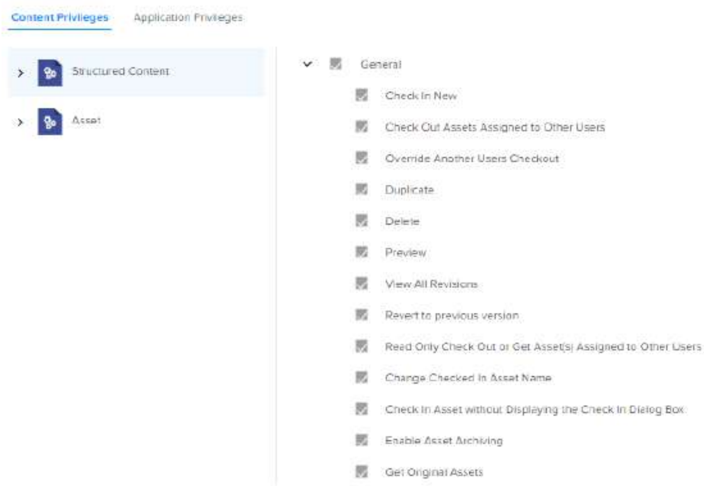


When the users of a role do not have the privilege to perform a specific task, the command will not be shown to them in any capacity.

There are 2 types of privileges in the system, both of which are described below:

Content Type Privileges

Content privileges are generally related to the degree and type of access user will have on a particular content type.



General Privileges

This section includes general privileges which can be given to any user.

Content-type privileges are those which give a user or group the right to change something in the content or content types stored within the system. So they are generally related to the degree and type of access that users or groups have towards content of different content type.

Please note the currently, privileges need to be defined at each content type and these are not inherited from parent content type to child. For example, Privileges in Smart Document or Smart Section need to be defined individually and will not be inherited if some privileges are defined at the Smart Content Level.

There are multiple privileges in the content type which a user can have. Each of them is briefly discussed below:

Check In New- The role members can create or check in new content, projects, files and other assets into the system.

Check Out Assets Assigned to Other Users- The role members can check out the content, projects, files and other assets that have already been assigned to other users.

Override Another User's Checkout- The role members can check out the content, projects, files and other assets that are already checked out by another user. If a user has an asset checked out and another user has the privilege to override that checkout, then the second user can select that asset, press Option/Alt, and click the 'Check Out' button. A notification message informs that the asset is checked out by a specific user.

Duplicate- The role members can duplicate content, projects, files, and other assets.

Delete- The role members can delete content, projects, files, and other assets.

Preview- The role members can preview content, projects, files, and other assets.

View All Revisions- The role members can view all revisions of content, projects, files, or other assets within the collections to which the user belongs.

Revert to the Previous Version- The role members can revert content, projects, files, and other assets to previous versions.

Read-only Check Out or Get Asset(s) Assigned to Other Users- The role members can only copy read-only versions of content, projects, files, and other assets. Users can retrieve copies of assets from the server without checking out the assets.

Change Checked-in Asset Name- The role members can change the names of checked-in assets that are assigned to other users.

Check In Asset without Displaying the Check In Dialog Box- Check this box to enable users to bypass the Check In dialogue box by pressing Option/Alt while clicking Check In Asset.

Enable Asset Archiving- This privilege allows users to archive Quark assets from within the system.

Get Original Assets- The role members can get the original version of assets from the system.

Publish- This set of privileges lets you control whether role members can publish in the various supported formats.

Publish Privileges

Publish type privileges are used to define what file types can be published by a user after saving the content into the system. Following are the different publish privileges:

PDF- This privilege gives access to a user to publish content in PDF format after completing the work.

HTML- This privilege gives access to a user to publish content in HTML format after completing the work.

QuarkXPress Project- This privilege gives access to a user to publish content or assets in QuarkXpress format after completing the work.

App Studio Article- This privilege gives access to a user to publish content in App Studio Article format after completing the work.

App Studio Package- This privilege gives access to a user to publish content or asset in App Studio Package format after completing the work.

Edit Privileges

As the name suggests, the edit type privileges allow a user to interact within the content and edit it via different sets of access given. When an admin creates attributes, he or she can specifically limit their access to users who have the privilege to edit normal and limited-access attributes. So by the same logic, users with the privilege to edit only normal fields cannot edit limited-access attributes. The edit type privileges are:

Edit Normal Access Fields of Asset(s) Routed to the User- The role members can edit Normal Access attributes for contents, projects, and other assets routed towards them.

Edit Normal Access and Limited Access Fields of Asset(s) Routed to the User- The role members can edit Normal Access as well as Limited Access attributes for contents, projects, and other assets routed towards them.

Edit Normal Access Fields of Asset(s) Routed to Other Users- The role members can edit Normal Access attributes for contents, projects, and other assets that are routed towards another user.

Edit Normal Access and Limited Access Fields of Asset(s) Routed to Other Users- The role members can edit Normal Access and Limited Access attributes for contents, projects, and other assets that are routed to another user.

Change Collection of Checked-in Asset- The role members can move a checked-in asset to a different collection within the system.

Change Workflow of Checked-in Asset- The role members can move a checked-in asset to a different workflow within the system.

Edit Redlining Privileges

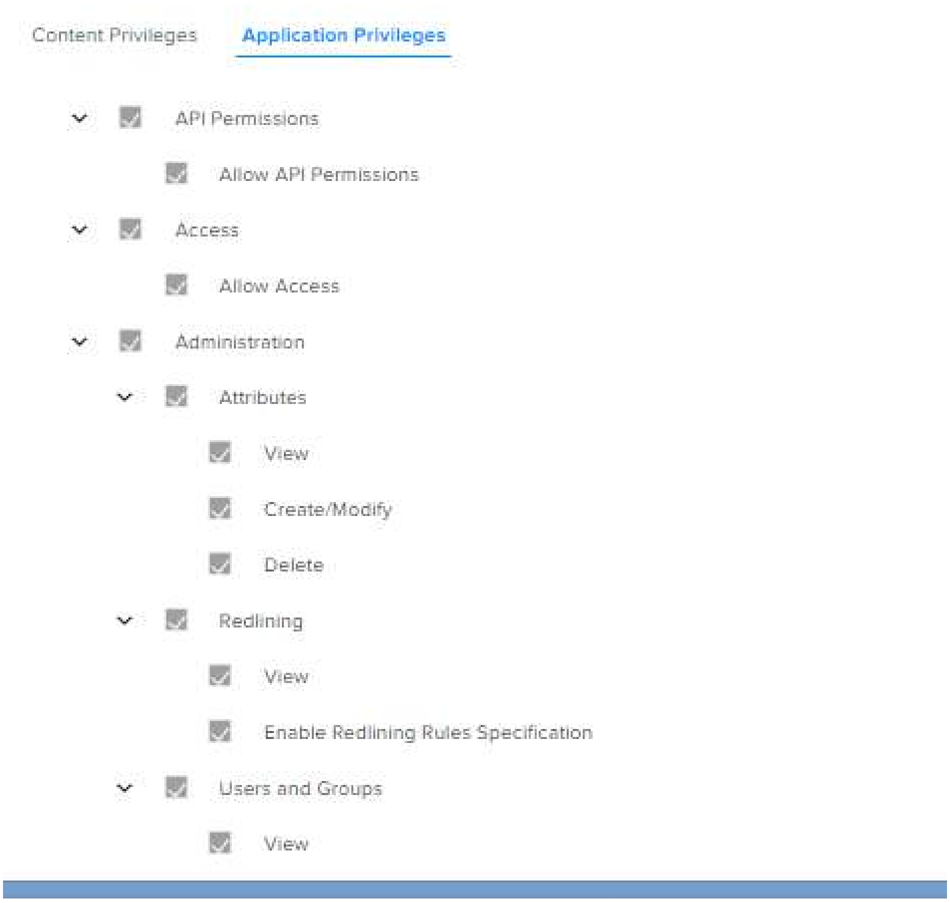
These privileges allow a user to either track the changes happening in content or accept the suggestions done by other users while tracking a document. It allows redlining the document by the user or checks the redlining of others. Following are the 2 redlining privileges:

Accept and Reject Changes (Selected/Displayed/All)- This privileged role members can accept and reject redlining changes.

Enable/Disable Tracking- This privilege role members can turn redline tracking on and off.

Application Type Privileges

Application privileges are generally related to the degree and type of access that users have to application features.



Administration Privileges

The following privileges apply to workflow and file management.

Attributes: This section includes three privileges to view, create and modify, and delete asset attributes.

Redlining: Use these privileges to control whether users can accept and reject changes, as well as whether they can enable and disable redline change tracking.

Users and Groups: This section includes privileges to view, create and modify, and delete users and groups of users.

Drop-down Menu Attribute Lists: This section includes three privileges to view, create and modify, and delete lists that you can include in drop-down menu attributes.

Roles: This section includes three privileges to view, create and modify, and delete roles.

Storage: The storage function allows you to specify locations for the Quark Content Enablement Platform Server to store assets, as well as rules for each kind of file type.

Repositories: This section includes three privileges to view, create and modify, and delete storage repositories.

Storage Rules: This section includes three privileges to view, create and modify, and delete locations for storing different file types.

Workflows: This section includes privileges to view, create/modify, and delete workflows.

Content types: This section includes privileges to view, create/modify, and delete content types.

Forms: This section includes privileges to view and modify forms.

Relations: This section includes privileges to view, create/modify, and delete relationships.

Workspace Privileges

The following privileges apply to the Quark Content Enablement Platform workspace.

Collections: This section includes privileges to create, delete, duplicate, move, copy, browse, and modify collections.

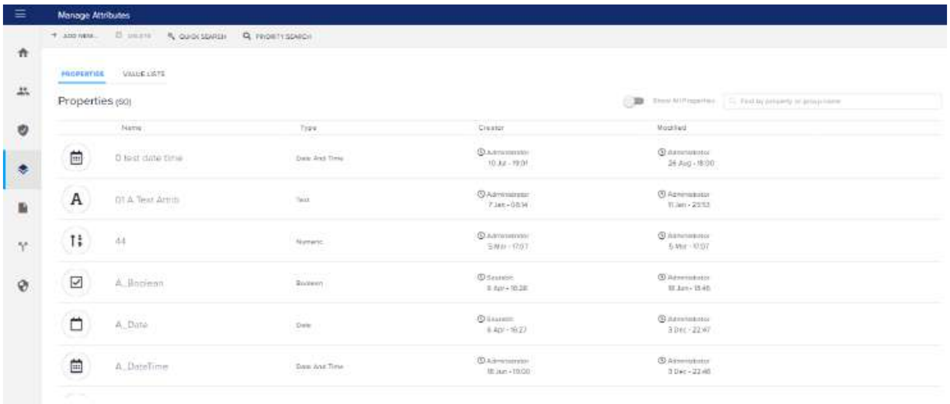
Collection Templates: This section includes privileges to create, delete, duplicate, move, and copy collection templates.

Searches: This section includes privileges to create/modify, share/unshare, and delete searches. It also lets you enable enhanced search displays.

Live Preview: Allows users to have a live preview of rendered XML documents in the References/Preview pane of Quark XML Author and Quark Author Web Edition.

Metadata

Metadata or Attributes UI can be used to create and configure attributes that can be associated with assets, article components, collection types, and layout types.



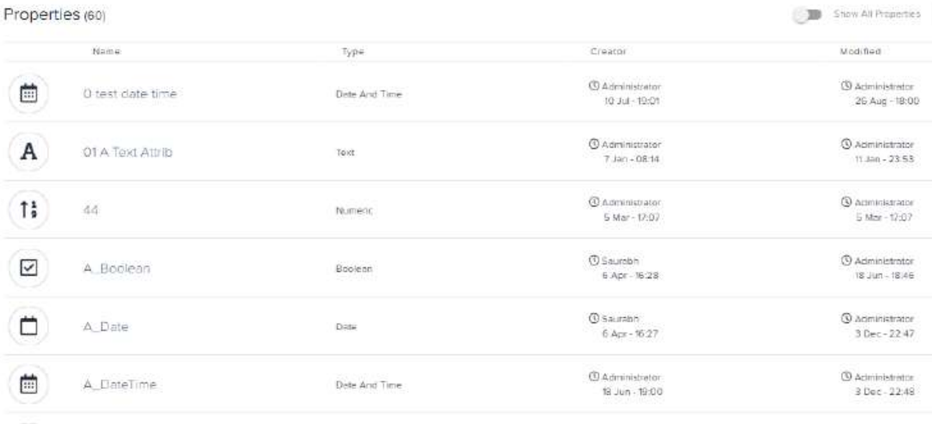
Properties

All the Quark Content Enablement Platform properties comprise a set of properties that determine the assets and the status of the asset in the workflow of the Quark Content Enablement Platform.

Every content type has a unique set of properties. They include system-generated information like the time and date of the previous modification, default properties of Quark Content Enablement Platform like Checked Out By, or some other custom properties that you may create to fulfill your workflow requirements.

For example, when you create a property named Image approved for a specific picture file. Hence, when a user would approve an image, they can check it at the Image approved property.

When another user searches for an approved photo, they would include Image approved criteria in their search. It will restrict the search results for approved images.



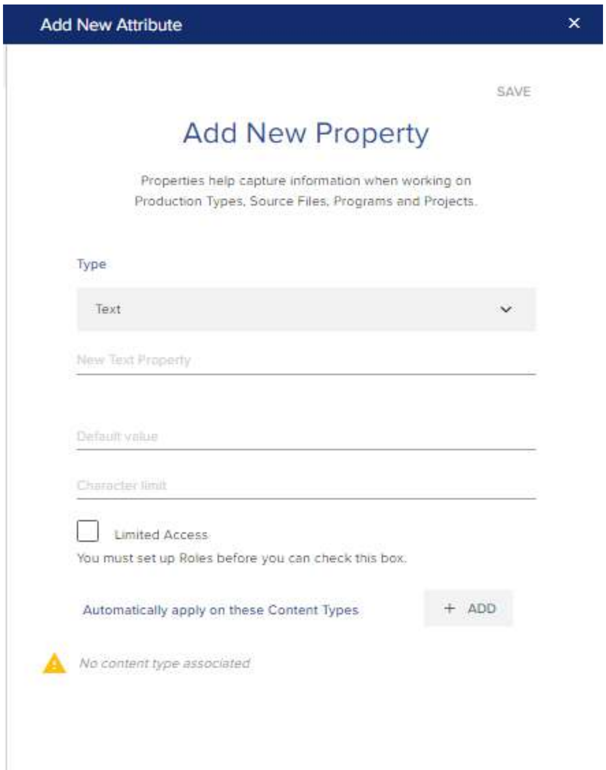
The user can create eight types of properties: Text, Date, Number, Measurement, Check Box, Dropdown menu, and Date-Time. Every property can have the feature of a default value. You can limit the access for every feature for only users who have control over editing “limited access” fields so that only certain users can edit the values of the properties.

The Menu has the feature of multiple values as well as hierarchical values.

Creation of a property

The steps to create a property are-

- Click on the plus sign (+), which will display the Create property dialogue box.
- Now you need to choose a property type from the available Type drop-down menu. (For detailed information about the kind of properties, click 'Understanding property types')



- Type a name for your property in the Name section.
- To give access to only the users having the 'Edit normal- and limited-access fields' privilege, you need to click on the property 'Limited Access.' To get more details clicks, click 'Roles and Privileges.'
- Do the configuration of the remaining controls. They are variable as they depend on the type of property that you select. For better understanding, check 'Understanding property Types.'
- For control on the type of property that you wish to apply, you need to select the boxes in the Appropriate Types tab.

Understanding the Property Types

There are mainly eight kinds of properties, including Text, Date, Number, Measurement, Check Box, Dropdown menu, and Date-Time.

Text

The user can make use of it to create text properties. You have to set up a default value in the Default Text space.

Enter a specific value in the Maximum Length section to understand the maximum length of a text in that field.

Date

You can use this property to create a date property with the following steps:

- Firstly, enter a default date in the Default Date section.
- For making the users comply with a particular date range, enter a specific start and end date in the Start Date and End Date fields, respectively.

Time

To use the time property type, which can be entered multiple times by the users, read below:

- You need to enter a default time in the given field.
- Now that the users have a constrained time range, you need to define a start time from the Start Time drop-down list and an end time from the End Time drop-down list.

Quark Content Enablement Platform user local settings to define the time value.

Number

To create a Number property, you need to do the following:

- Enter a default value for the Default Value section.
- To constraint the users in a given numeric range, you need to type a minimum number.

Measurement

You may use the measurement property type for creating properties where the users can enter only measurements.

- Firstly, enter a default value in the Default Measurement section.
- Use the Units drop-down list to choose a specific unified unit of measurement.

For constraining the users to make use of a particular range of size, you proceed by entering a Minimum Value in the section and a maximum value in the Maximum Value section.

Check Box

It is the property type used for creating checkbox properties. To display the properties by default with a checkmark, you have to check on the Default option.

Drop-down Menu

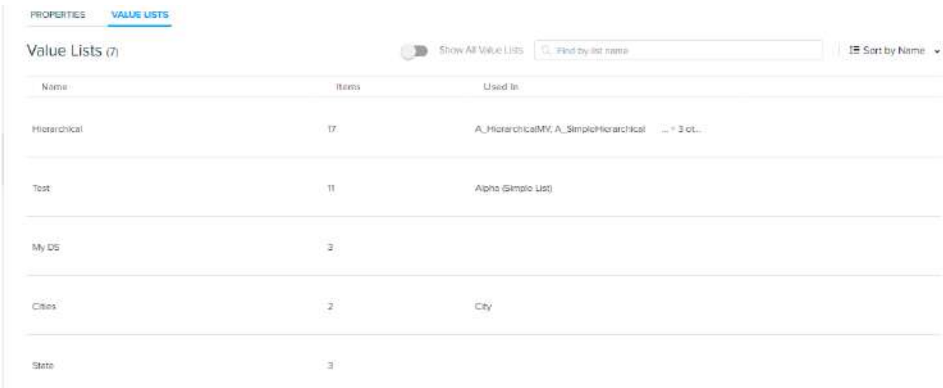
You may use the Drop-down Menu property for creating a new drop-down property.

Create a Drop-down Menu Property Type

The Drop-down menu displays a vast list of values which are termed property domains. For example, when creating a drop-down menu property that necessitates a list of users on the system, you may use the existing list with your property instead of entering all the names manually.

Value Lists

The value lists provide the default list of arguments or values to any property. The user or admin can create a single or list of attributes according to the property's type. These value lists can be seen when the document is created and the default values and list are already in the designated section.

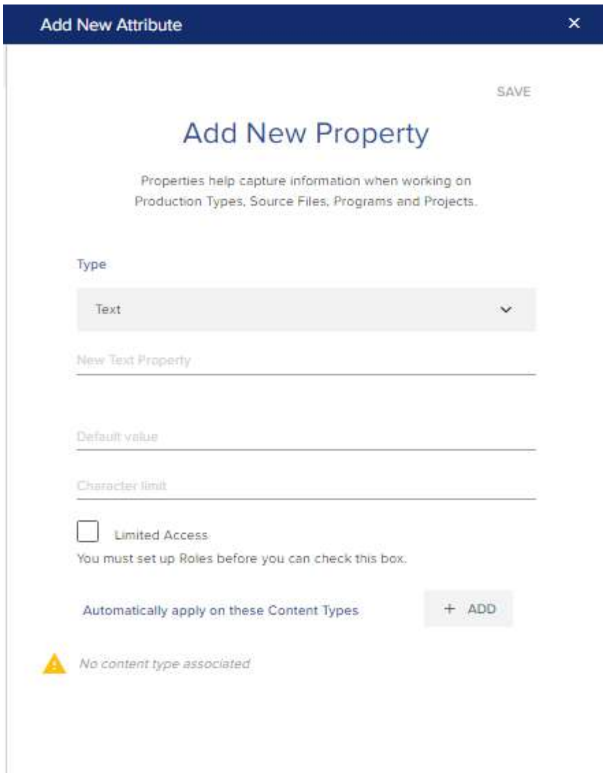


The list can be viewed in this section with attributes such as Name. Items, Used-in. These attributes can be used in the sorting of the list as well, which is discussed in the next section as well.

Creation of a Value List

The steps to create a value-list are-

- Click on the plus sign (+), which will display the 'Create property' dialogue box.
- Now you need to choose a property type from the available Type drop-down menu. (For detailed information about the kind of properties, click 'Understanding property types')



- Type a name for your property in the Name section.
- To give access to only the users having the ‘Edit normal- and limited-access fields’ privilege, you need to click on the property ‘Limited Access.’ To get more details clicks, click ‘Roles and Privileges.’
- Do the configuration of the remaining controls. They are variable as they depend on the type of property that you select. For better understanding, check ‘Understanding property Types.’
- For control on the type of property that you wish to apply, you need to select the boxes in the Appropriate Types tab.

Search Options

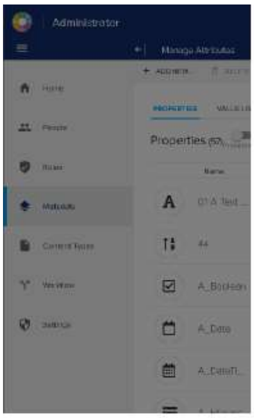
The search options are given in the QE Admin Section to help users with searching the collections and assets according to a limited sum of attributes, defined here. These search options are used in the CE Workspace Searches section.

There are 2 search options provided in the Quark Content Enablement Platform:

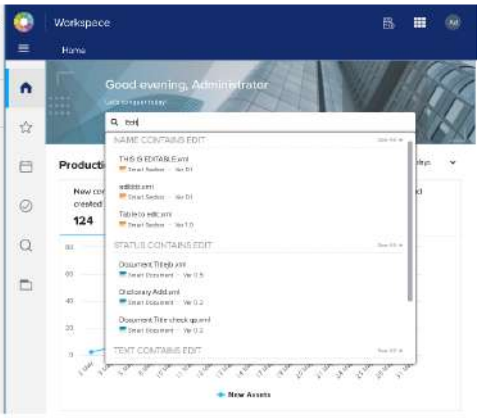
Quick Search

The Quick Search Option allows the administrator to add or remove the attributes which can be used as constraint or limit the quick search functionality. If no attribute is selected, quick search only searches the text for the keyword that is searched in quick search bar. Suppose if name is added, quick search will search the keyword in name of asset in addition to the text containing the search keyword.

When Quick Search option is clicked, the right pane opens and shows all the currently added attributes and a dropdown to add more attributes. Quick search works with text attributes such as Name, Collection Path, Status etc. Please note that date and time type attribute are not recommended to be used. (It is advised that Search Queries with these attributes can be created specifically from New Search on Searches UI).



Administrator > Quick Search Attributes

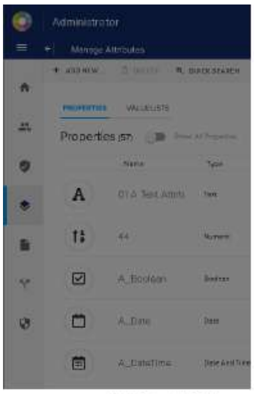


Workspace > Quick Search

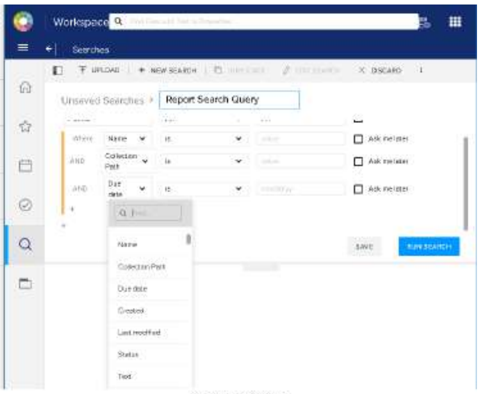
Priority Search

The user can utilize the priority search attributes to set the relevant attributes which will appear on top in parameter list while creating new Search queries on Workspace Search UI.

To choose the attributes, click on priority search and from the properties' pane appearing on the right, choose the priority search attributes.



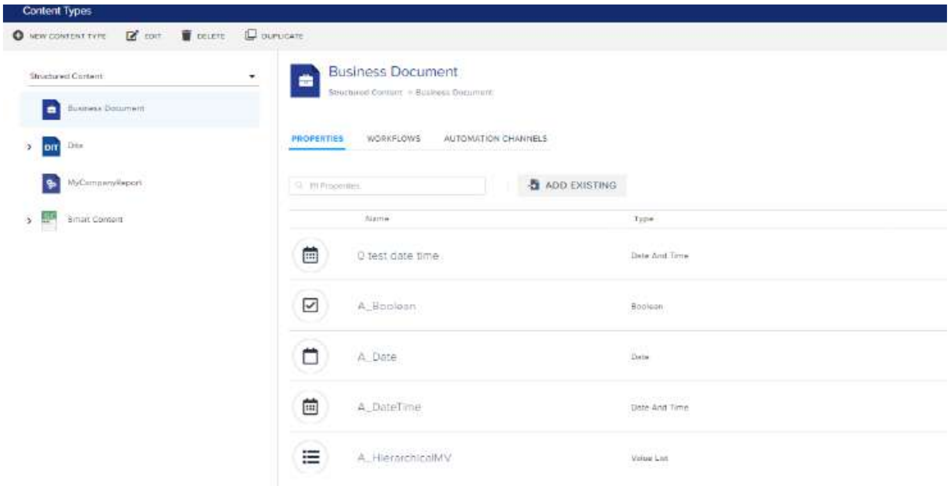
Administrator > Metadata



Workspace > Searches

Content-Types

There are multiple types of content available in the Quark Content Enablement Platform. All these contents as well as their properties can be edited by the administrator with enough privileges. The contents and their types are then used by designated authors to write the specified type of content inside it.



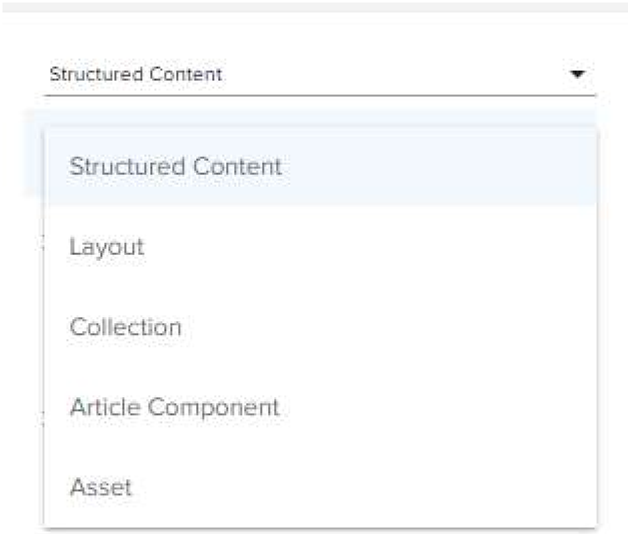
The main UI of Content-Type can be divided into 2 mainframes. The left frame (or column) holds the name of all the content types in the system and the right one holds all the properties and other attributes related to a chosen content.

On top of the 2 frames, there exists a toolbar with all the operations to be done on a content type. The Left frame also holds a drop down, in which different categories of content types are specified to be chosen. These categories will be discussed in detail in the upcoming section.

Content Categories

Content categories in the Quark Content Enablement Platform are divided into 5 main types:

1. Structured
2. Layout
3. Collection
4. Article Component
5. Asset



These categories are divided according to the task that can be performed in each type of content inside those categories.

Different content types have different attributes. For example, the list of properties for a picture consists of values like "Pixel width," "Pixel height," "Resolution," etc. Some properties, such as "Checked out duration," and "Is checked out" are relevant only to the Quark Content Enablement Platform, and are stored only in the system only.

All the categories of content types inside the system are explained below:

Structured

Structured Content is the first, foremost, and most used category of all. It contains different system defined as well as user-defined content types on which authors can work on. Structured Contents can have all 3 attributes i.e., Properties, Workflows, Additional Channels.

All these will be discussed in detail in further sections.

Layout

Layout type content provides a basic mold for a Project or page to be created. It has 4 basic types: App Studio, Interactive, Print, and Web.

These layouts are used with other products of Quark such as QuarkXpress. In QuarkXpress, the user can use these layout types to create different documents and these 4 basic types are the ones responsible for the input and output sections in QuarkXPress (.qxp) format documents.

Collection

The Collection content type helps with creating the folder type structures in the Quark Content Enablement Platform File System. The collection type helps take one or more assets of same type or with common properties and can be combined under a similar collection in the system.

This collection allows the users to search and find a set of assets with common properties at ease within the overall file manager of the Quark servers. There are many premade collections inside the platform in which the user or admin can tinker with the properties.

The admin can also create new collection from the same page and change the properties here.

Article Component

The Article Component is the document type that are used in Quark CopyDesk. These are defines in 2 types:

- Text Components
- Picture Components

Both can be used accordingly in the QuarkCopyDesk (.qcd) document files and can be managed from here as well.

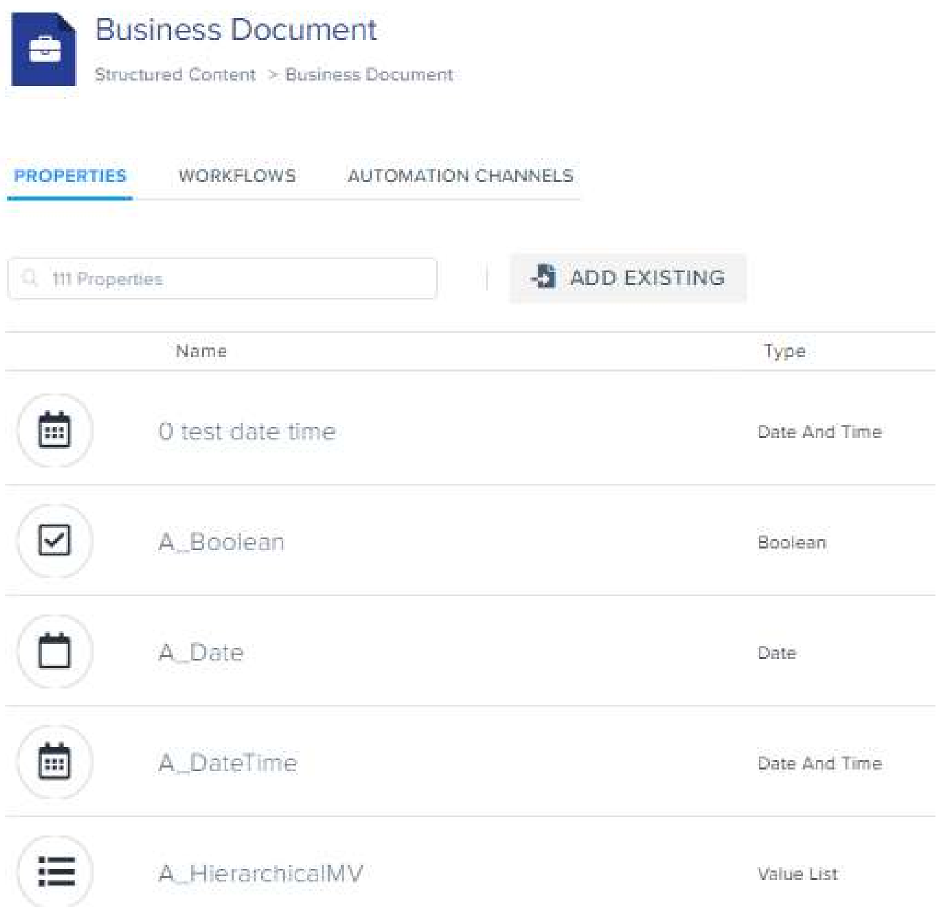
Asset

The asset section helps Quark Content Platform admin to upload new assets such as pictures, videos, etc into the Quark Content Enablement Platform File System. These assets can then be used by other authors to import the same into the documents created in the editor.

The Assets content types and their properties can be changed in accordance to the admin or author's requirement directly from the page.

Content Attributes

Content Attributes are specific data attached to a Quark Content Enablement Platform content asset. These are a set of protocols and information that every content of a single type must store within the system. These data attributes might include such information as the time and date, to whom the asset was assigned, the due date, and the status of the document itself.



There are 3 main types of content-based attributes in the Quark Content Enablement Platform. All of them are described below:

Properties

The properties section has been created to add different properties to content types and assets inside the Quark Content Enablement Platform. These properties are part of every asset inside the Quark servers.

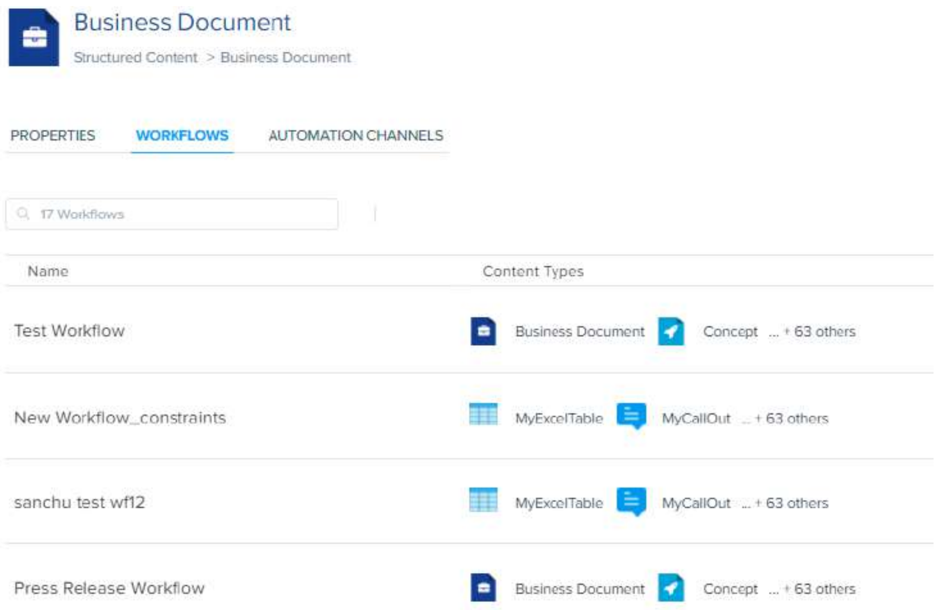
Any of the properties can be searched via the main search bar, which resides on top of the list. These properties are specific to each of the content types which can be selected via the content types drop-down menu.

There is also a button next to the search bar with the label 'Add Existing'. This button helps add any existing property from the list of all properties in the Quark system, to be added in the selected content type. When clicked on the button, the content properties list pane opens from the right of the screen. Each property has a checkbox next to them, which can be selected to add that property into the properties list of selected content types.

In the list of properties, 2 of the attributes connected to each property are visible: Name and Type. The name of the property shows the label from which it was created in the system and the type shows which data type is supported when adding values in that property.

Workflows

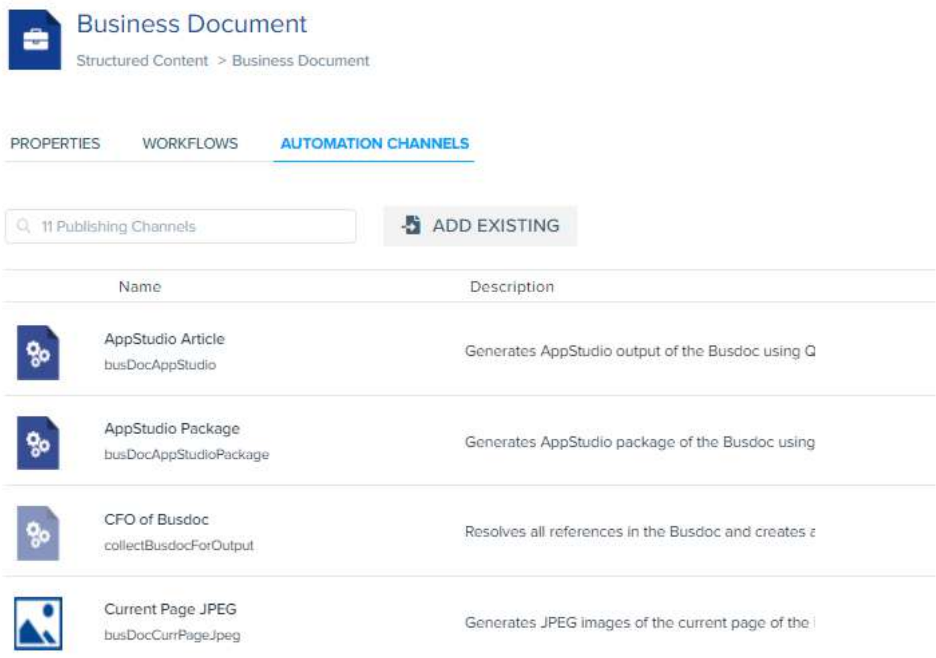
The workflows are an integral part of the Quark Content Enablement Platform as they serve as the interlink between the user and the content stored on the server. The workflows allow an admin or an author to various things with a specific content i.e., from assigning authors to the content to checking the status, and much more.



Same as the properties' UI, you can search any of the workflows from the search bar. Below it there exists the list of workflows with name and content types associated with them. The list shows which content types follow which workflow in the Quark system.

Automation Channels

The additional channels allow users to have outputs and previews inside the system. These automation channels can be added according to the content's requirements and user's necessities.



There are options give in the UI to control the automation channels for each content type in the Quark Content Enablement Platform. These operational UI features are given below:

- First is the search box which can be used to find any of the published or preview doctype in the use.
- Secondly, there exists an add existing button that can be used to add more document types to publish in the selected content type.
- The third is the disable button, which allows the user to disable the preview of that specific automation channel for its respective content type.

Content Operations

There are certain content operations that can be performed according to the user or admin. These are concluded one by one in the following segment:

New Content Type- The new content type dialog box opens when you click the New Content button at the top of the section. The dialog box asks for the content type and name. After entering those details the user can see the new content type created in the respective region.

Edit- The edit button allows the admin to edit and tinker with the properties workflow and automation channel of the same content type, with also getting access to rename the content type.

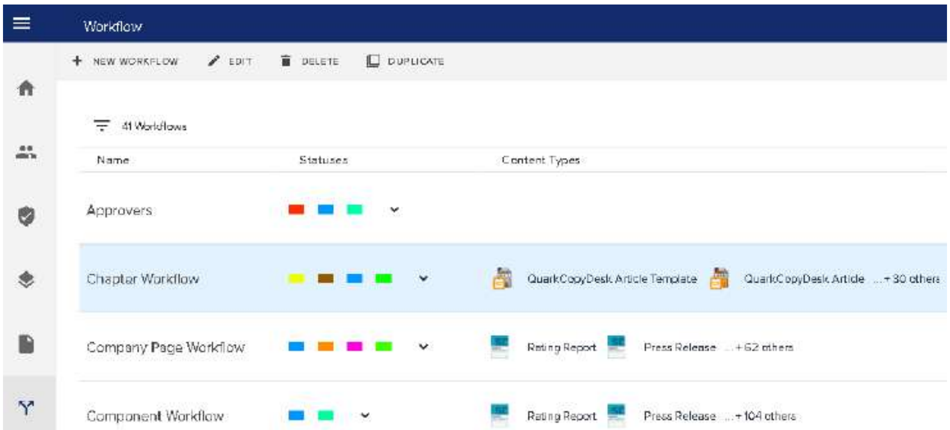
Delete- The delete button removes the selected content type from the list of contents in the Quark Servers.

Duplicate- As the name suggests, the duplicate button allows the admin to duplicate a content type with all its properties and other attributes attached to the previous ones.

Workflow

A workflow is a set of steps that helps you to manage/publish a document. You define workflows at the server level and then apply them to collections.

The workflows allow an admin or an author to associate various status, attributes with a specific content type i.e., from assigning authors to the content to checking the status, and much more. The Workflow can emulate the stages of production of any content.



Each process/workflow has the complying with the following characteristics:

- **A name.**
- **A list of asset types to which it applied**
- **A list of stages or status in a particular order or not in any order**
- **A list of asset attributes. You can define constraints for some attributes at the workflow level.**
- **An attribute form for each asset type. (The attribute form displays when you save revision of an asset)**

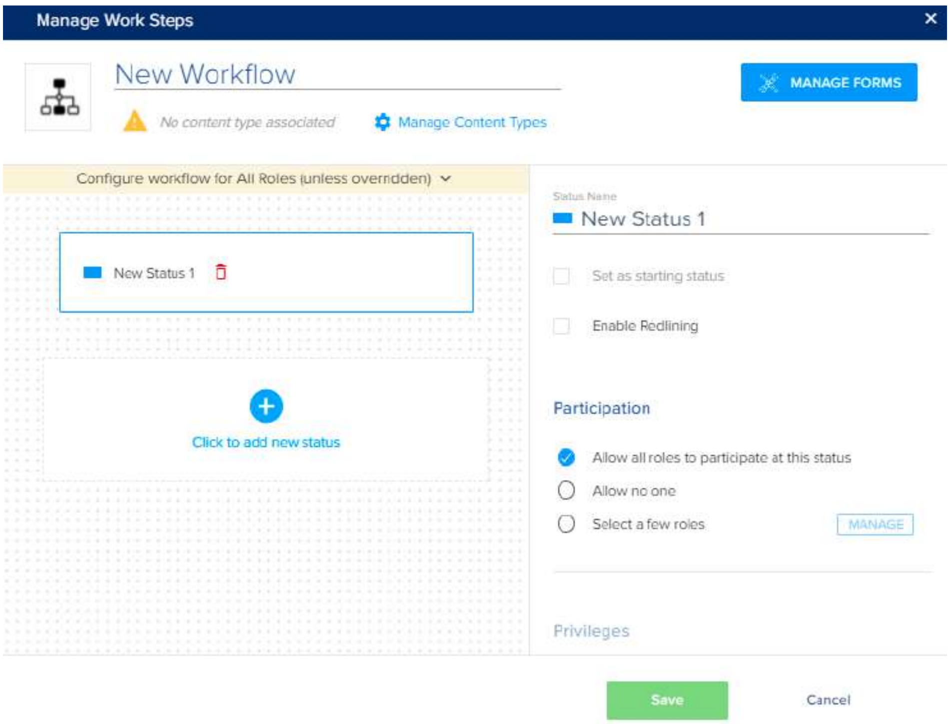
For instance, a user could specify that properties start with a condition called 'Appointed', adhered to by '**In Development**', '**In Review**', as well as '**Completed.**' The user can also specify that a property with the 'Completed' status immediately directs to an editor for final approval. The user can also enable or disable check-in design evaluation, and outcome format evaluation for each status.

Status changes can be overridden per role.

With a list of characteristics, features are specified at the application level to use them, a user can define restrictions for some attributes at the workflow level. There is a characteristic status for every property kind. (The status shows when you check property in).

Creating a workflow.

Creating a workflow is a very important part of workflow management in the Admin section. Adhere to the following steps to create a new workflow in the Quark system:



To produce a workflow:

- Click Workflows. The Workflows home page screen displays.
- To develop a workflow, click + (New Workflow) under the Name listing. The Include Process dialogue.
- Enter a name for the workflow in the Name field.
- Choose the content types to be allowed to come under the specific workflow

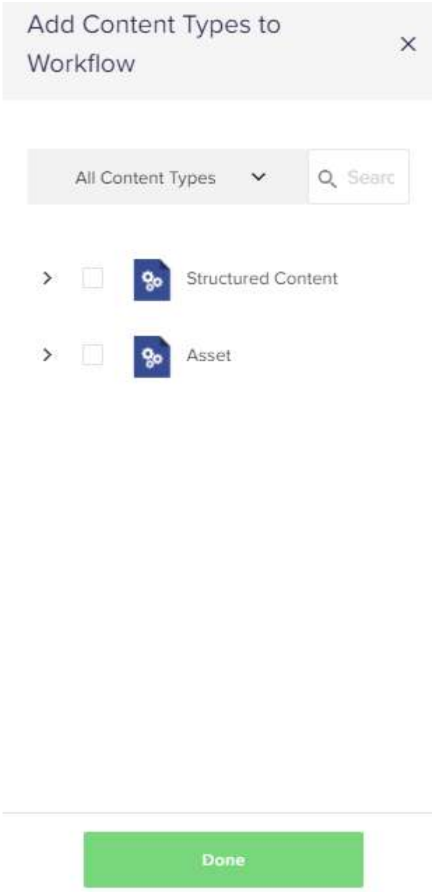
- Under Statuses, add a new status, allow Participation and Privileges accordingly.
- A status can be Set as starting status and when a user Starts Workflow for the asset, this status will be the starting status displayed to the user.
- If user wants to enable redlining i.e enable tracking and highlighting by default if asset transitions to a particular workflow status, he the check the 'Enable Redlining' checkbox.
- User can add transitions possible transitions from one workflow status to another.
- User can associate color with each workflow status.
- Choose the respected statuses and add them all one after another
- User can associate Roles with particular workflow status.

- Click Save.

Add Content Types

To add a workflow to the specific content types, you have to edit the workflow and add those content types to it. Here's a step by step guide to add content types in a specific workflow:

- Click Workflows. The Workflows home page screen displays.
- Click on any workflow you would like to edit.
- After the workflow opens, click on the 'manage content types' option.
- After the pane appears from the right side of the screen, check all the content types you want to associate with the selected workflow.
- Click Save afterward.

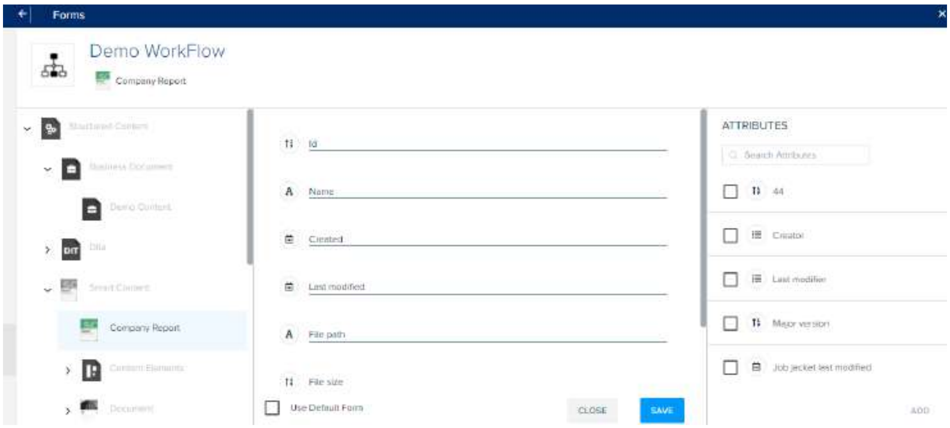


This allows only those content types to use that workflow when used in the CE Author or CE Workspace sections. Other content types which are not selected in the same will not receive this workflow as an option in its 'workflows' tab.

Manage Forms

There is also an option to manage forms inside the edit workflow section. It allows the admin to choose which properties should be visible to the users when the content associated with this selected workflow is opened with a property pane.

The property pane shows all properties by default but this option restricts the number of properties which can be shown to the users or authors for an asset of specified content type which is in the specified workflow



To Manage Forms within the workflows, follow the steps below:

- Click Workflows. The Workflows home page screen displays.
- Click on any workflow you would like to edit.
- After the workflow opens, click on the ‘Manage Forms’ option.

- After clicking manage forms, a window opens with all the content types written in the leftmost pane.
- All the content types that are not associated with the selected workflow will be faded and unselectable while the associated ones will be shown s colored and selectable.
- As the content type opens after getting clicked on, it will show all the properties which are already being displayed in the middle tab.
- To edit the properties, uncheck the ‘Use Default Form’ checkbox present at the end of the page.

- After unchecking it, all the attributes will be shifted to the rightmost pane.
- Search and select the attributes from the pane and click the check box before them to show them in the properties pane.
- After selecting all the desired attributes, click add. The added attributes will again be shown in the middle tab.

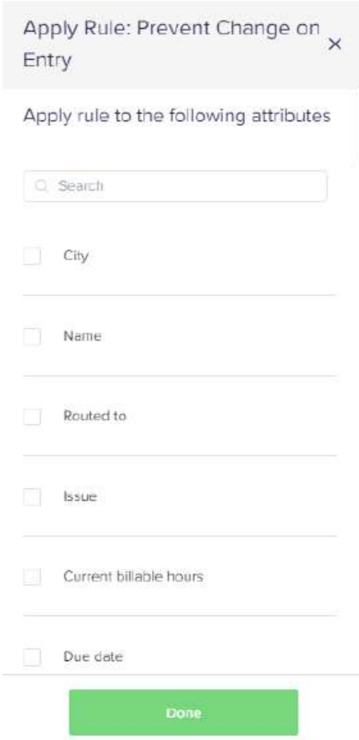
- Click ‘Save’ to save the changes and go back to workflows page.

Add Statuses and Properties

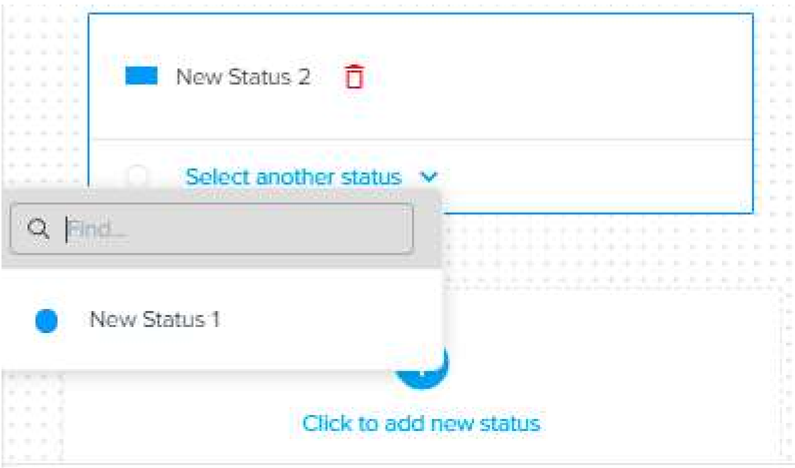
The statuses provide the steps that are needed to be completed to complete a workflow in the Quark Content Enablement Platform. Each workflow has its very own series of statuses.

To work with a process’s statuses:

- Click Workflows. The Workflows home page screen displays.
- Select a process in the Workflow Name list.
- Click the Status tab.
    - To add a status, click add status from the right pane.
    - To edit a status, click its name.
    - To delete a status, click the bin icon from the status itself
- Check the name of the statuses carefully.
- Go into a status name for more options.
- Make use of the Shade control to associate a shade with the status. This shade presents in the Condition symbol column in the Workspace window.
- To make it possible for redline tracking for articles with this condition in this workflow, inspect Enable Redline Monitoring.
- To instantly review roles’ participation with this status in this process, check when their jobs are signed in, examine Participation.
- To instantly assess privileges with any status in this process, when sent to a specific role, check the Privileges section.
- For All Roles configure rules to Enter into or Exit out of this status, check in and checkout sections are available as well. Some of its options that are available at both check-in and check-out are:
    - **Prevent the change of the following properties-** It prevents the roles to change the following list of properties in the workflow.
    - **Require a change of the following properties-** It requires the roles to change the following list of properties in the workflow.
    - **Require a value for the following properties-** It requires the roles to edit the compulsory attributes in the following list of properties in the workflow.



- Click Save and your statuses are ready to be implemented in the workflow.



Operations

There are multiple operations that can be performed on the workflow section of the CE Admin, Quark Content Enablement Platform. These are discussed below:

Edit- Edit Workflow opens up the same window which was opened when chosen 'Create Workspace' in the last section. It allows you to change/edit all the options which were assigned at the creation of that selected workflow.

Delete- Delete workflow option allows an admin to remove a workflow completely from the Quark system so that it can no longer be used. If some documents are already associated to that workflow, then the administrator will not be able to delete that workflow.

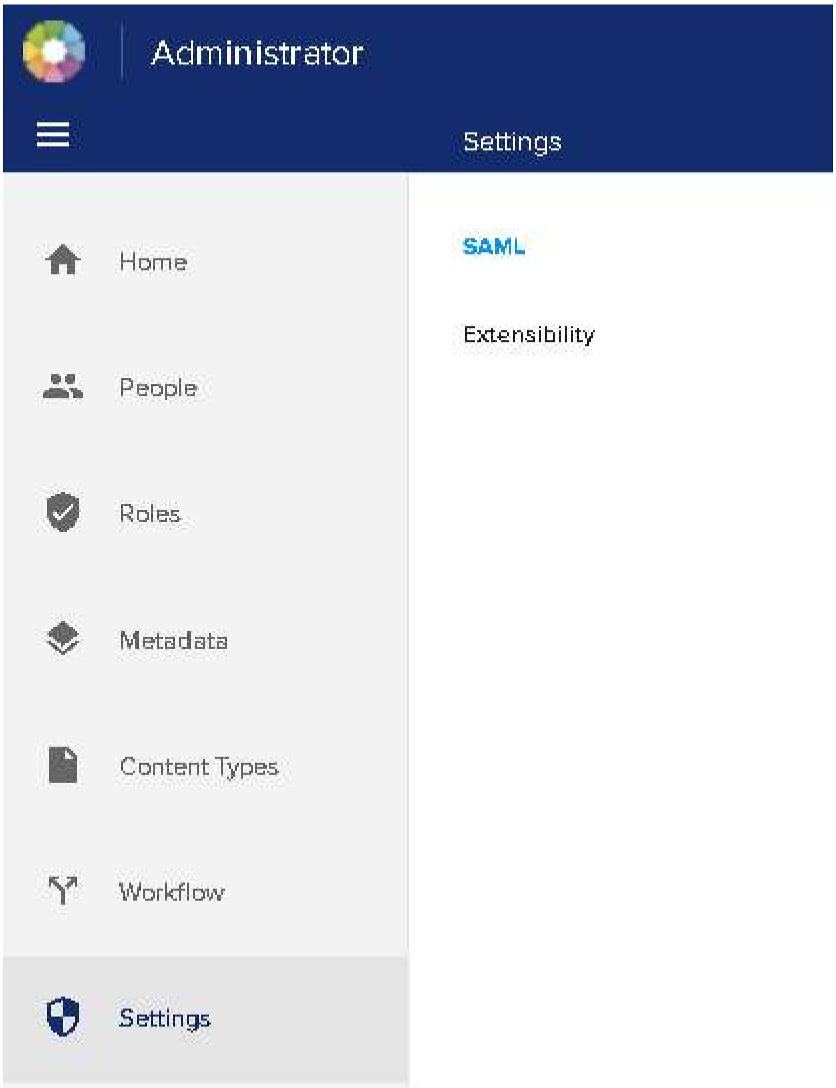
Duplicate- Duplicate option allows an admin to create a duplicate of the selected workflow in the Quark server.

Sort- Sorting options can be utilized via clicking on the attribute name in the workflow list itself. For example, click the 'Name' to sort the whole list by name.

Settings

The settings section allows an administrator to set up the environment on a local machine or in the organization to send requests and get responses from the Quark servers, to be able to use the Quark Content Enablement Platform.

These settings allow the administrator-type users to roll out various changes in accordance with the organization's needs. The settings are mostly based on the Service Provider and the Identification Provider given values with some admin-based attributes as well.



SAML settings on the Quark Content Enablement Platform are given below:

SAML 2.0 ENDPOINT (HTTP)- This Field allows the administrator to add their IDP (Identification Provider) given address. This address allows the system to get a response from the Quark server.

Identity Provider Issuer- This is a unique key given to the administrator to identify the identity provider within the system.

Callback URL- The callback URL allows the system to sent requests on it, to access the Quark application from a machine.

Public Certificate- These certificates allow the system to get encrypted data from the server and decrypt it at the user end.

SAML Assertion for login- This field allows the administrator to choose the attribute which will be used universally within the organization.

Legal