

CE Workspace User Guide



Contents

Introduction	1
About Quark Content Enablement Platform	2
Create	2
Manage	2
Publish	3
Deliver	3
Login into the Product	4
Workspace Introduction	6
Workspace Home	8
Quick Search	9
Background Tasks	9
Production Trends	10
New Content Items Created	11
Content Items Edited.....	11
Content Items Published.....	11
Users Edited Content.....	12
Right Now	12
By Content-Type	13
By Status	14
By Assignment	14
My Assignments	15
Favorites	15
Searches	16
Continue Editing	16
Interaction with the Graphs	17
Favorites	19
Operations	20
My Assignments	21
Operations	21
Quick Menu.....	22

Bulk Edit.....	23
View Asset	24
Continue Editing	26
Operations	26
Quick Menu.....	27
Bulk Edit.....	28
View Asset	28
Searches	31
New Search	32
Search Constraints	32
Ask Search	33
Browse	34
New Collection.....	35
Add To Collections	36
Collection Operations	37
View Assets and Collections	39
View Collections.....	40
View Assets and Panes.....	47
Operations	55
Legal.....	57

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.

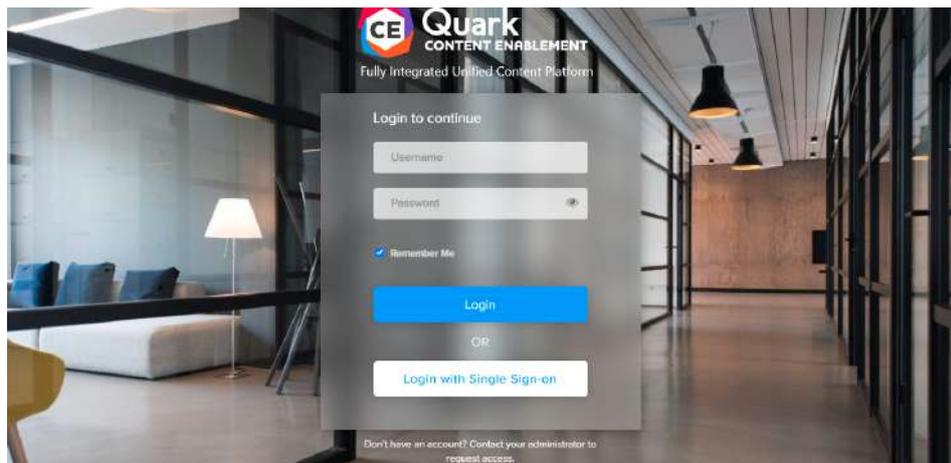
Login into the Product

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 username and password the next time you login, check 'Remember Me'.

Login to continue

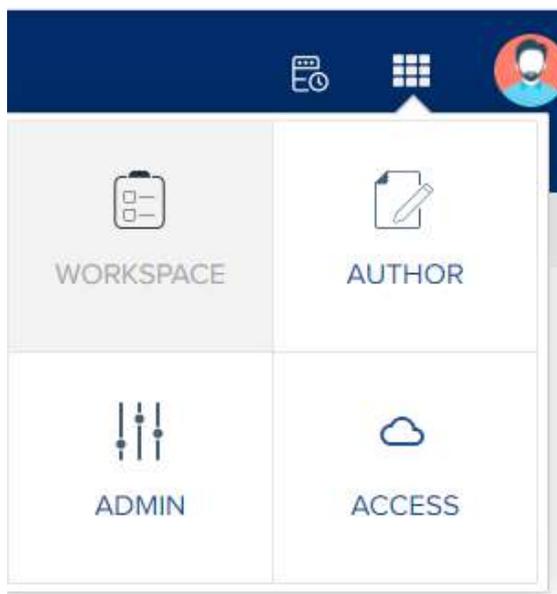
Username
alex

Password
***** 

Remember Me

Workspace Introduction

The Workspace Tab in the Quark Content Enablement Platform is a middleware that is used by managers to manage users and their statistics in the system. The workspace acts like a place where a user or manager can check the entities of the system and users of the system alike.



The workspace tab is subdivided into 6 sections in total. Each of them gives a manager some or other kind of features to manage users or assets in the system.

A manager account made for controlling workspace can manage Assignments, Favorites, Contents, Searches, and a lot more through different panels.

To access the workspace ca panel, one has to navigate to the following URL:

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

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

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

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

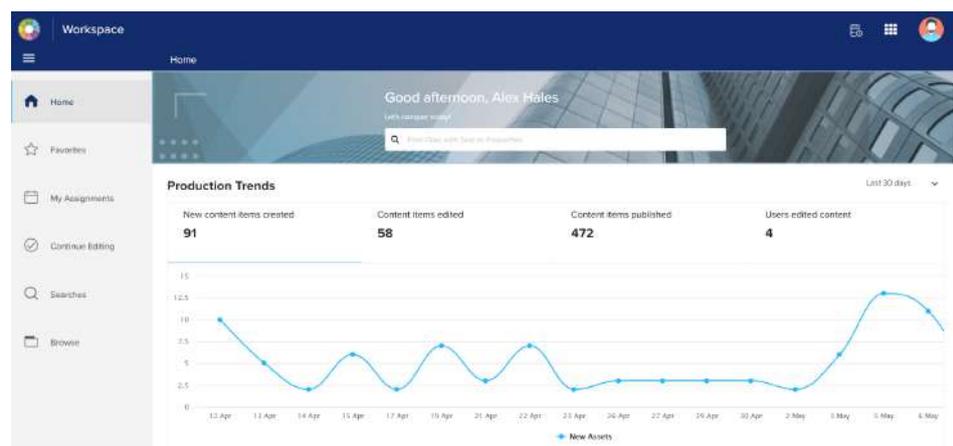
After accessing the workspace panel, the workspace homepage is the first page to come in front and the user can access other pages from the left navigation panel itself. A detailed description of each page is given in the following sections.

Workspace Home

The Workspace Home is the first page that appears when either the user logs in into the system or click the workspace tab from the primary navigation panel of the site. This page offers the basic previews for the users and gives insight into the system users and assets at a quick glance.

The workspace home can be divided into 6 different parts, all of them are explained one by one in detail ahead.

But first, let's start with the User Interface or UI of the home of the workspace tab.



In terms of UI, the page starts with the name of the tab with the Quark logo on its left. On the right, there exists a primary navigator to navigate between tabs, and just before it is an option to check which tasks in the system are running in the background.

After that, there is a display picture on the corner, which when clicked, gives the name of the user logged in with options to either view the profile or log out of the Quark Content Enablement Platform.

After coming a bit downwards the actual homepage starts. On the leftmost part of the screen, there exists a navigation pane with all the subsection names written in it. And the page itself starts with a timely greeting, written along with the username of the currently logged-in user.

The sections after this are explained in detail below:

Quick Search

After the greetings and the username, there’s a search bar that allows one to search any file in the system with its properties, name, or attributes. This quick search bar helps the user to quickly find the assets, and collections according to the word or phrase.



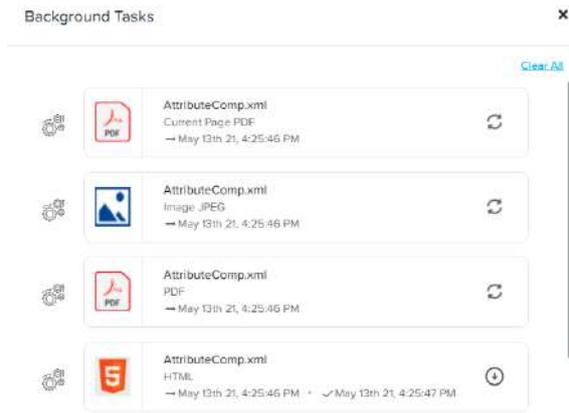
When accessing the quick search bar, a user can type any keyword and the system produces the results if the keyword is:

- Contained in the Title (DITA)
- Contained in the Name
- Contained in the Title
- Contained in the Last Modifier
- Contained in Creator

There is also an option to ‘see all’ which takes the user to the browse section with all the ‘Searches’ attributes available. These attributes are covered in a later section.

Background Tasks

At the top of the screen, there is a button given that indicates the background tasks being performed in the Quark Content Enablement Platform in real-time. When clicked ‘background tasks’, a new window opens on the screen, denoting various tasks that have been put in action via a user or admin in the Workspace section.



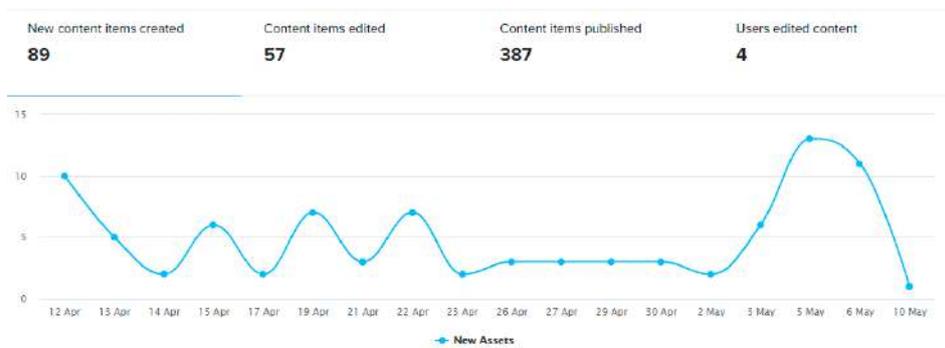
These background tasks are added when a user queues the publishing of a document (or multiple documents), in one or more file formats. All the tasks in the queue are then shown in the 'Background Tasks' window.

Also, the exported search results from the 'Searches Section' can be downloaded from this window. To know how to export these results, check out the stated section.

Production Trends

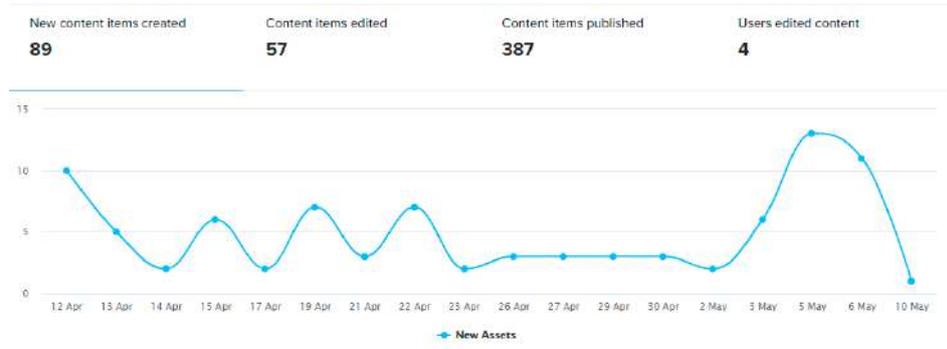
The production trends screen shows the graph with the number of assets that have appeared in the system for a definite period of time. The graph is displayed in the form of a continuous line on which there are dots defining the different types of entities on the graph according to which stat is being studied in the Quark Content Enablement Platform. The timeline can also be changed via the drop-down menu on the top right of the graph. The time period can be chosen from 7 days, 15 days, and 30 days.

Following are the statistics which can be seen on the graph of production trends:



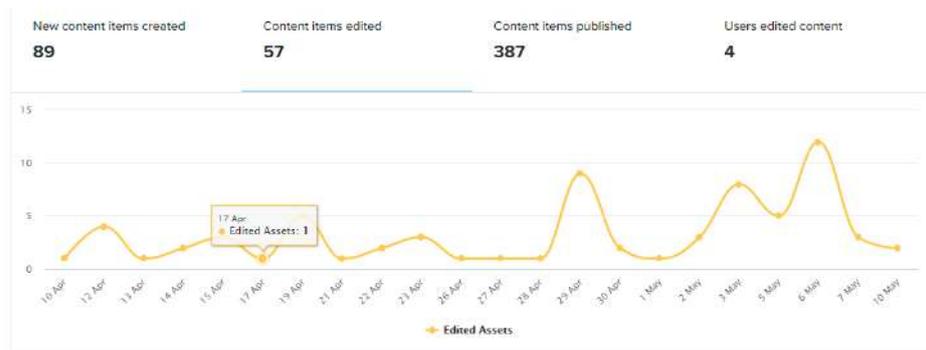
New Content Items Created

As the name suggests, this statistic on the graph shows how many new assets, or content items to be exact, are added to the system. The graph shows the ups and downs in the number of contents. The dots here represent each new content created. The number on the top also shows the total number of new content created in the time frame.



Content Items Edited

The number of content items that are opened and edited by any of the users in the system can be tallied by this statistic. The content items edited in the system are shown by the yellow dots and the yellow line represents the increase and decrease in the number respective to the timeline. The number on the top signifies the total content type items created in the designated time frame.



Content Items Published

This graph shows the logged-in user how many contents have been published in the designated timeline. The content items that are completed and checked by the author are published in different file formats as per the requirement. This graph tracks all the details of the publishing of the documents. The graph, as usual, shows ups and down according to the number of items published. The number on the top gives the total items published during the timeline.



Users Edited Content

The last purple-colored graph shows user-edited content. It actually defines the number of active editors working on the Quark Content Enablement Platform in the timeline. The number of editors is marked by a dot on the up and down-scaling graph as usual. Also, the number on top gives the total number of users who edited some content within this time frame.



Right Now

The drop-down User Interface of this section consists of the section name on top with a setting icon with it. the setting icon, when clicked, opens up a drawer from the right. The drawer contains a search bar on which the user can type his search query for analysis.

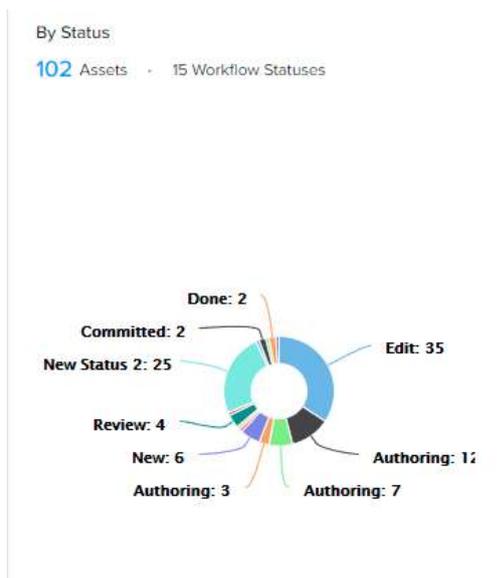
On the extreme right of it, there exist 2 drop-down menus, which are marked as 'Workflows' and 'Teams'. These drop-downs can be used to change which workflow or group do a user wants to see on the graph.

Coming to the graphs, there are 3 different statistical graphs to show different insights to the user, these are:

By Status

The status section of the graphs shows a pie type graph with all the statuses defined in the system with the number of contents associated with that specific status. At the top of the graph, there are text denoting the total number of assets in the system and the total number of workflow statuses.

The pie chart below defines all the statuses with different colors and with that there are labels to denote the name of the status and how many contents share that status. On hover, a user can highlight a specific section and a hover box appears with the name of the status and associated status.



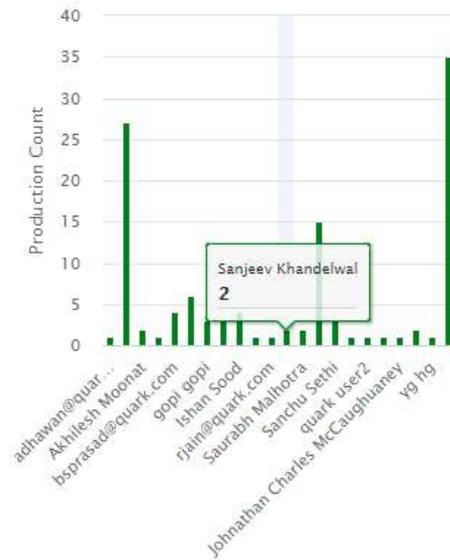
By Assignment

The 'assignment' section is similar to the 'content type' section where a bar chart was used for statistical representation. On the top of this section, the numbers define the total assets in the system and the total number of members in the system.

The bar chart below shows the names of all the members residing in the system and the product counts assigned to them within Quark Content Enablement System. The graph doesn't represent the actual number of assigned assets so for this, the mouse can be used to get the definite number for each member.

By Assignment

117 Assets · 22 Team Members



My Assignments

This section shows all the files that are assigned to the currently logged-in user. This sub-section holds a small list that contains the name of the document with its path in the Quark server, here the document is currently saved.

The Assignments section allows you to see all the assigned contents via 'See All' button which is situated just with the 'My Assignments' title bar.

There is also an option to toggle the list between list view and card view via the option given on the opposite end of the title 'My Assignments'.

The List can also be sorted according to any of the attributes shown in the list. When clicked any of the attribute, the list will sort according to the same attribute.

My Assignments (2) [See all](#)

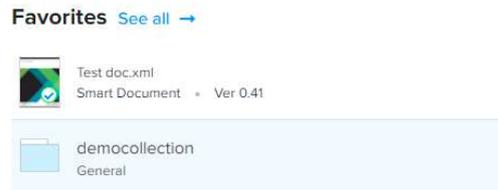
Name	Collection Path	Creator
 AttributeComp.xml Smart Section · Ver 0.6	Home/1 Sanchu/democollection	 Alex Hales
 Test doc.xml Smart Document · Ver 0.41	Home/1 Sanchu/democollection	 Alex Hales

Favorites

This section shows all the files that are assigned to the currently logged-in user. This sub-section holds a small list that contains the name of the document with its path

in the Quark server, here the document is currently saved. The favorites can also be of the collection types as well which are shown in the same list as of the assets.

The UI of this section contains label mentioning the name of the section itself. On the right of it there exist a link 'See All', which allows user to go beyond the currently visible list and see all the content and collections which are there in your favorites.

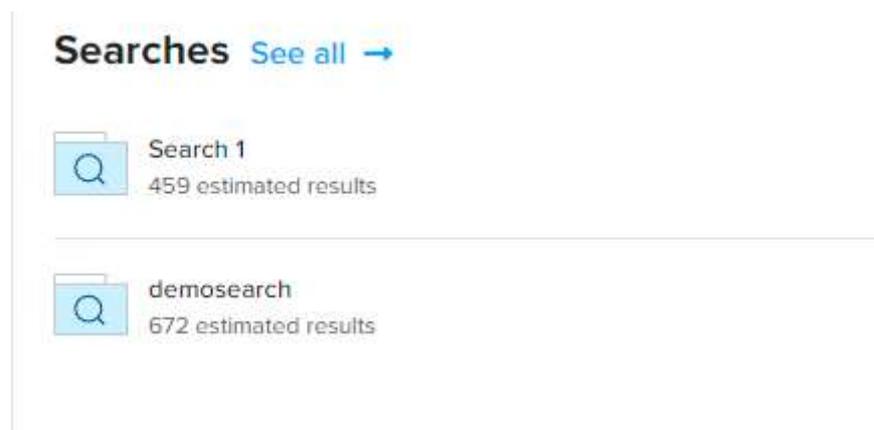


Searches

This section allows a user to use predefined searches in the system to find specific files inside the Quark servers. The document or any other kind of asset can easily be searched using this section.

Here the searches can be of both Ask type as well as Normal-type. So according to the nature of the search, the document can be found from the server itself.

The UI of this section starts with the label mentioning the name of the section itself. On the right of it there exist a link 'See All', which allows user to go beyond the currently visible list and see all the searches which are there to execute.



Continue Editing

The continue editing section helps a user track the last edited document by the same user. The user can check the documents in the list and open them to continue editing them as usual.

The UI of this section starts with the label mentioning the name of the section itself. On the right of it there exist a link 'See All', which allows user to go beyond the currently visible list and see all the documents which are there to continue editing on.

On the rightmost side, there exist 2 buttons to change the view of the documents to either list or grid respectively.

There's a small list following this, which indicates some of the documents' names and details in it

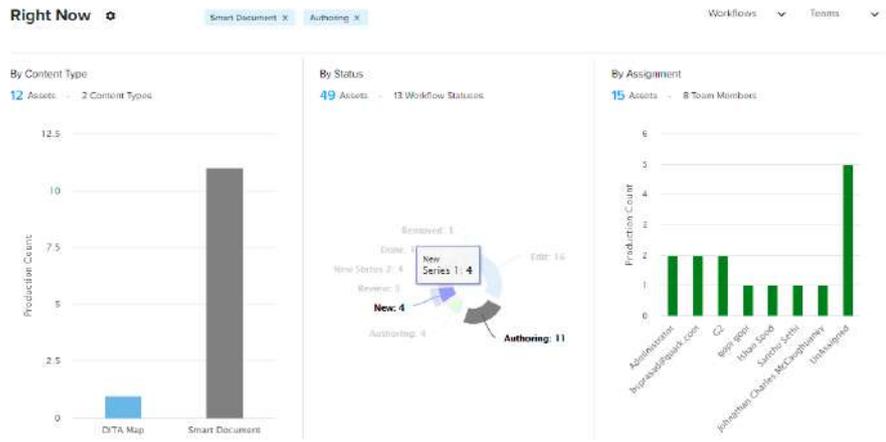
Continue Editing (3) [See all](#) →

Name	Created	Last Modified	File extension	Indexing stat...	A...Date
 AttributeComp.xml Smart Section + Ver 0.6	Apr 07, 2021, 12:16 PM	May 05, 2021, 6:26 PM	xml	Completed	Apr 21, 2021
 Test doc.xml Smart Document + Ver 0.41	Mar 17, 2021, 3:40 PM	May 05, 2021, 3:59 PM	xml	Completed	
 license_certificate_PTBO24YLK... Plain Text + Ver 01	May 03, 2021, 5:47 PM	May 03, 2021, 5:47 PM	txt	Completed	

Interaction with the Graphs

The interaction with the graphs is done with the help of a cursor. The 'right now' section in the QE Workspace is interactive via the following methods:

- When the graph is opened on the regular homepage, it states the default values in each of the three graphs explained above.
- When clicked on any of the sections (content types, status, or assignment name), the graph filters according to the selected sections.
- All the selected filters are shown on the top, after the title.
- To delete any selected filter, click on the cross icon on the side of the filter name.



Favorites

As briefly discussed above, this section contains the list of documents that have been starred or marked as favorites by the currently logged in user. These favorites can be of any file format and by clicking on it, the document opens in the quark editor. Not only that, but the collection can also be part of the favorites when starred by a user.

The Favorites section consists of a page with a page title on top. After which there is the option to upload a file or a folder into the Quark Server. After which comes the list of favorite documents, assets, and collections which are specific to the logged-in user. The list comprises the name of the document with some properties assigned to it.

The user can also search the favorites via the search bar on the right side of the screen. This search bar is used to search the favorites via their 'Name'.

This site also contains a sorting drop-down menu which helps the user sort the favorites via:

All Favorites- This helps the user have all the favorites in the list below.

Assets- This helps users show only assets in the list below.

Collections- This helps users show only collections in the list below.

Searches- This helps users show only searches in the list below.

Favorites [See all →](#)



Test doc.xml
Smart Document • Ver 0.41



democollection
General

FAVORITES

Operations

When clicked on one of the favorites from the list, the following operations can be performed on the same:

Upload- This option enables the user to upload files from the local storage to the Quark Content Platform server.

Go To Location- This option allows the user to see the destination folder or collection where the selected file is present.

Remove From Favorites- Removes the selected collection or asset from the favorites of the logged-in user.

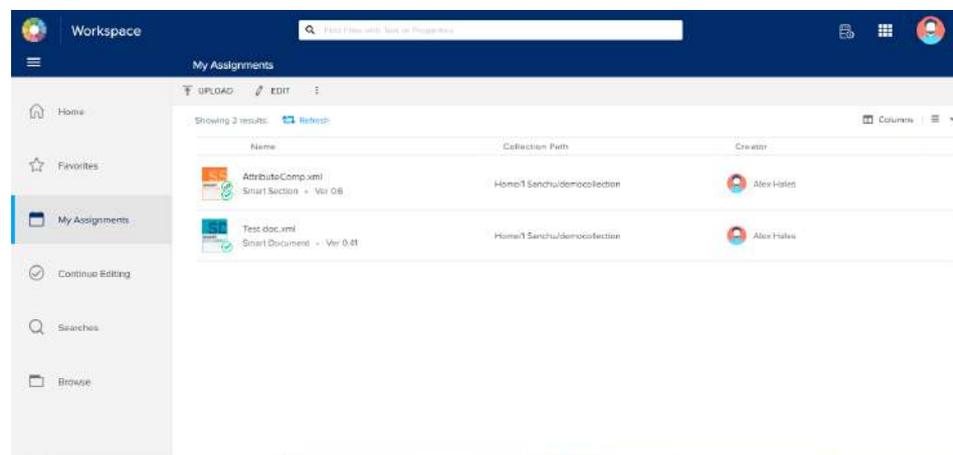
My Assignments

As discussed above as well, this section shows all the files that are assigned to the currently logged-in user. This sub-section holds a small list that contains the name of the document with its path in the Quark server, here the document is currently saved. The section provides easy access to assigned works to the specific authors to complete the documents with ease.

The User Interface of the section starts with the page title as 'My Assignments'. Below it, there is a toolbar that provides various operations to be used on the files assigned. This toolbar will be explained further below.

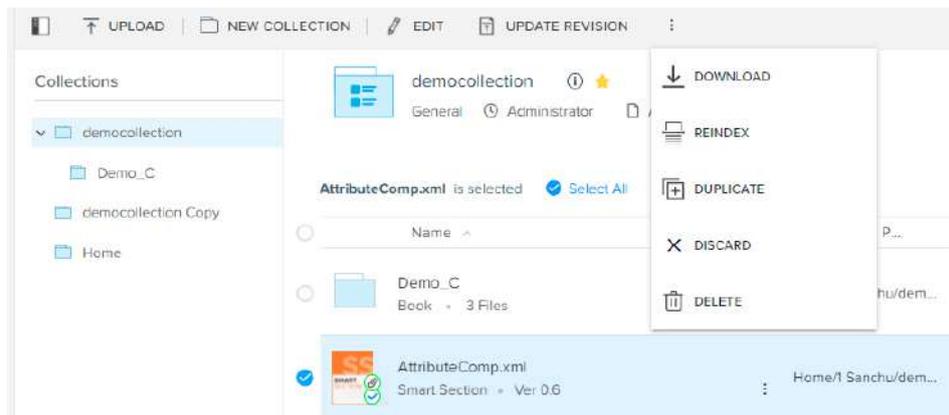
Below this section, the name of the selected document is written. On the rightmost section, there is another set of tools that will be explained further ahead.

The assignments list contains the name, collection path, creator, and other such properties of the document assigned to the specified user.



Operations

The tools which are given in this section are:



Upload- This option enables the user to upload files from the local storage to the Quark Content Platform server.

Go To Location- This option allows the user to see the destination folder or collection where the selected file is present.

Edit- Opens the file in Quark Editor to edit the file ahead of the last known save state.

Update Revision- Updates the version of the file according to the author.

Download- Downloads the file in a specific file format.

Export- Exports the assigned file into one of the file formats that are given permission for that specific content type.

Reindex- Reindexes the file in the system. Refreshes and reloads the file on the server.

Duplicate- It creates a duplicate of the selected file in the Quark server.

Discard- Discards the file from the list of files.

Delete- This function deletes the file permanently from the Quark server.

Columns- It adds the properties as columns to the given list. These columns can be clicked in the list to sort the list according to a specific attribute.

Views- Changes the view from list to grid or vice versa via the toggle button.

Preview- This helps generate the preview of the document on the right-side preview pane.

Properties- Shows the properties of the document in the properties pane on the right of the screen. Here the properties can also be edited according to the user.

Links- Shows all the linked assets to the specific document inside the Quark system.

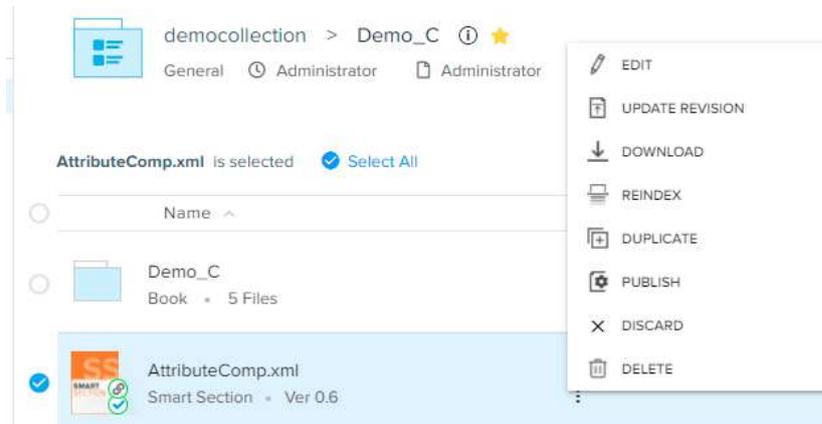
Publish- Publishes the content in the permitted file formats.

Quick Menu

There are also two more menus that help utilize these options these are called Quick Access Menus. These are shown when a user hovers its cursor on the given asset.

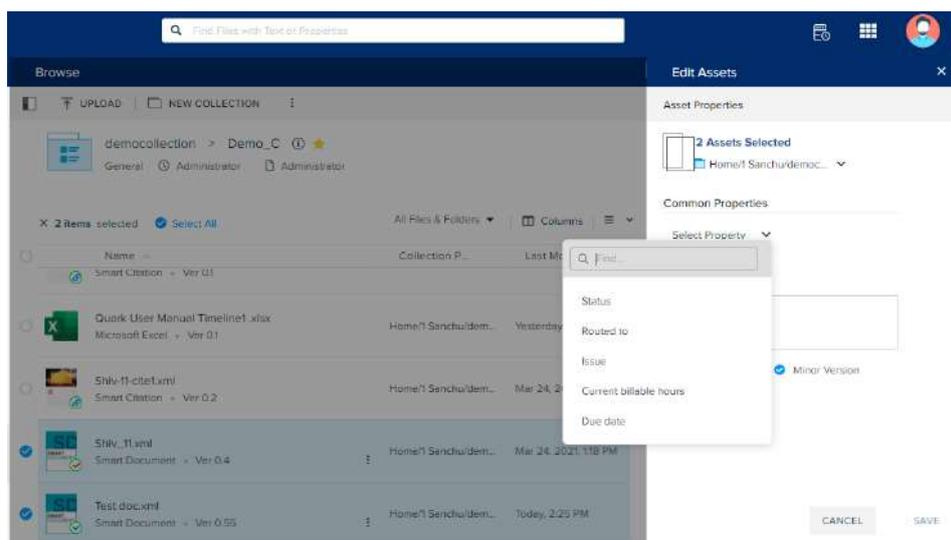


Essentially all the operations are the same, but it is easy to access those operations from right beside.



Bulk Edit

When multiple documents are selected from the list then only some of these options work in accordance with the selection. One of the options that are changed in the 'edit properties' option.



When selected multiple assignments, the properties pane allows their properties to be edited in the bulk. To do the same, select any of the properties from the list of properties drop-down. Then change the value and click 'Save'.

View Asset

Assets stored inside the Quark servers in any collection can also be viewed in the 'My Assignment' segment of CE Workspace. The assets are stored within the Quark server. These assets or contents can be found when a collection is opened. When a user clicks any of the assets, a preview pane appears from the right side of the screen.

On this preview pane, there are the following functions and operations that can be used by the admin or author to control the asset itself:

- **Edit:** Edit allows the user to change the name or version of the asset.
- **Start Workflow:** This allows a user to start any allowed workflow on the given asset. The starting status and a user will be assigned to the asset according to the Admin itself.
- **Download:** Download the asset to the local file system.
- **Reindex:** Reloads and Reindexes the file on Quark Servers.
- **Discard:** Deletes the asset from the list of files.

Also, there are multiple panes that allow other functionalities to an Admin to work around an asset. These are:

Preview Pane: This feature is used to preview the file in multiple file formats. This is a step taken to ensure accuracy in the publishing of the document. The document preview can only be done in the associated automation channels, as per the content type of the asset. There are multiple types of file formats that an author can preview a file within the Quark Content Enablement Platform. These file formats and their previews are defined one by one below:

1. **JPEG-** Previews the document in the JPEG Image view. The previews sport a zoom option to either zoom in or out with the help of designated buttons. It also has a reload key to refresh the data and a download key to download the preview on the local machine.
2. **PDF-** PDF preview allows the content to be previewed in PDF form. It has the same reload and download buttons as the JPEG pane. Other than that there's also a print option to print the preview file in real-time.
3. **HTML-** HTML preview pane allows the author to preview the file in HTML view. This view also has the refresh and download button for the same purpose.

There are many more types that can be chosen in the content types, under the CE Admin section.

Properties Pane: The properties pane shows the properties of the document. The properties pane starts with the name of the pane, then there is a toggle button to show all the properties.

The manager can easily edit the properties according to the requirement or search via the search bar. Also, there is an option to access, read or write revision comments in the designated area given.

History Pane: History Pane shows all the versions of this document that have been saved after doing some kind of change or another. The version also shows the information such as which user has edited the document and at what date-time.

There's a toggle switch on the top which enables and disables the view of autosave versions of the documents.

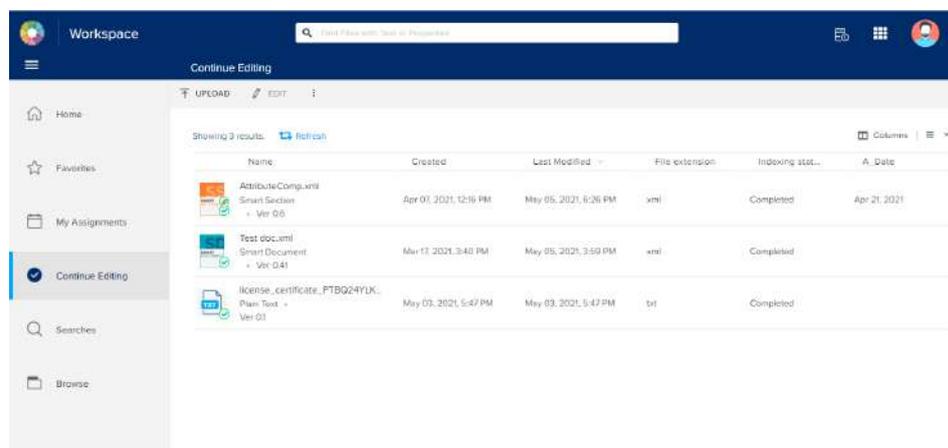
Links Pane: The links pane shows all the referenced assets in the document. It shows the asset with its name, date of attachment, its properties that are transferred with the same, and the version of the asset. The user can also find the links from the search bar.

Continue Editing

As mentioned above, the Continue Editing Document section shows all the documents that are last edited by the currently logged-in user in the Quark Content Enablement Platform. This section shows the list of documents with some of their properties such as Name, Created On, Last modified, File Extension, Indexing Status, etc.

The UI of this section starts with the title followed by the same toolbar as in the 'My Assignments' section. The layout is exactly the same as that section, the only change being there are only the user-edited documents listed in the list rather than the assigned documents.

Whether the document is assigned to the specific user or not, if the document is edited by the logged-in user, it will show on this list.



Operations

The tools which are given in this section are:

Upload- This option enables the user to upload files from the local storage to the Quark Content Platform server.

Go To Location- This option allows the user to see the destination folder or collection where the selected file is present.

Edit- Opens the file in Quark Editor to edit the file ahead of the last known save state.

Update Revision- Updates the version of the file according to the author.

Download- Downloads the file in a specific file format.

Export- Exports the assigned file into one of the file formats that are given permission for that specific content type.

Reindex- Reindexes the file in the system. Refreshes and reloads the file on the server.

Duplicate- It creates a duplicate of the selected file in the Quark server.

Discard- Discards the file from the list of files.

Delete- This function deletes the file permanently from the Quark server.

Columns- It adds the properties as columns to the given list. These columns can be clicked in the list to sort the list according to a specific attribute.

Views- Changes the view from list to grid or vice versa via the toggle button.

Preview- This helps generate the preview of the document on the right-side preview pane.

Properties- Shows the properties of the document in the properties pane on the right of the screen.

Links- Shows all the linked assets to the specific document inside the Quark system.

Publish- Publishes the content in the permitted file formats.

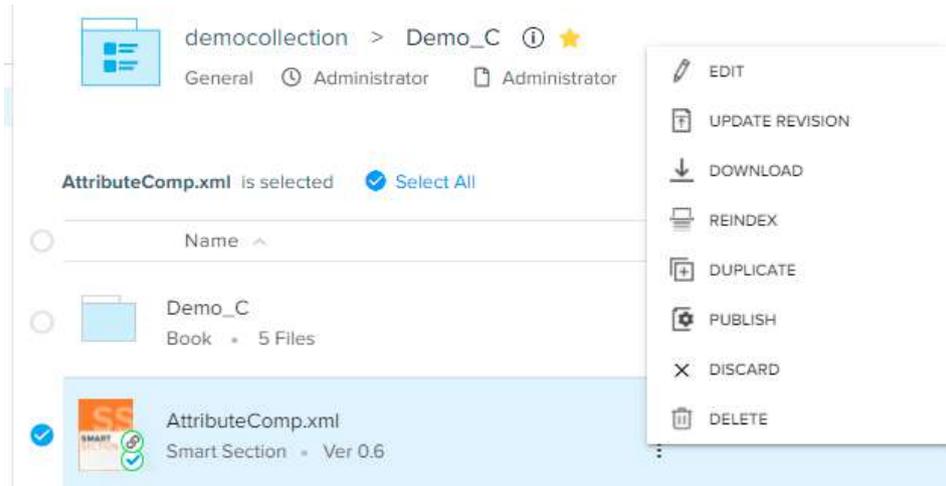
Quick Menu

There are also two more menus that help utilize these options these are called Quick Access Menus. These are shown when a user hovers its cursor on the given asset.



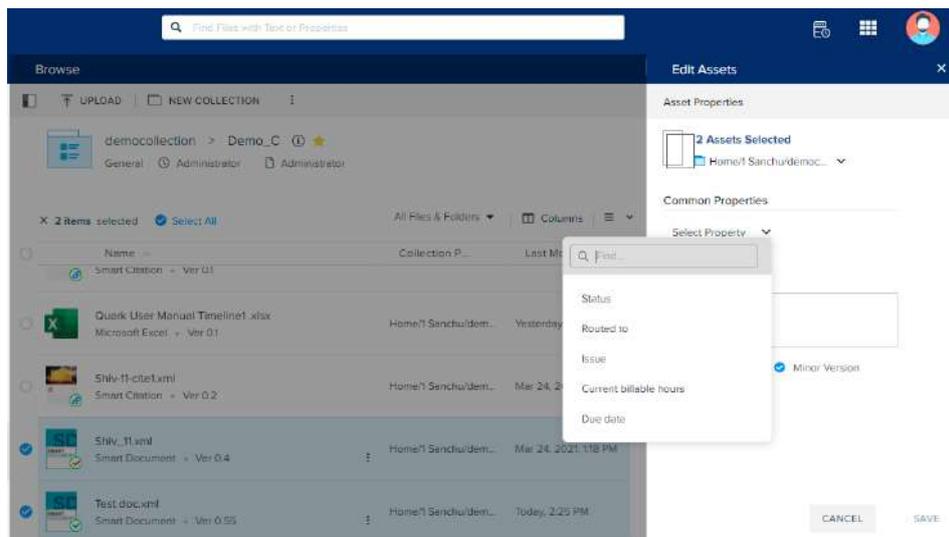
Essentially all the operations are the same, but it is easy to access those operations from right beside.

CONTINUE EDITING



Bulk Edit

When multiple documents are selected from the list then only some of these options work in accordance with the selection. One of the options that are changed is the 'edit properties' option.



When selected multiple assignments, the properties pane allows their properties to be edited in the bulk. To do the same, select any of the properties from the list of properties drop-down. Then change the value and click 'Save'.

View Asset

Assets stored inside the Quark servers in any collection can also be viewed in the 'Continue Editing' segment of CE Workspace. The assets are stored within the Quark server. These assets or contents can be found when a collection is opened. When a

user clicks any of the assets, a preview pane appears from the right side of the screen.

On this preview pane, there are the following functions and operations that can be used by the admin or author to control the asset itself:

- **Edit:** Edit allows the user to change the name or version of the asset.
- **Start Workflow:** This allows a user to start any allowed workflow on the given asset. The starting status and a user will be assigned to the asset according to the Admin itself.
- **Download:** Download the asset to the local file system.
- **Reindex:** Reloads and Reindexes the file on Quark Servers.
- **Discard:** Deletes the asset from the list of files.

Also, there are multiple panes that allow other functionalities to an Admin to work around an asset. These are:

Preview Pane: This feature is used to preview the file in multiple file formats. This is a step taken to ensure accuracy in the publishing of the document. The document preview can only be done in the associated automation channels, as per the content type of the asset. There are multiple types of file formats that an author can preview a file within the Quark Content Enablement Platform. These file formats and their previews are defined one by one below:

1. **JPEG-** Previews the document in the JPEG Image view. The previews sport a zoom option to either zoom in or out with the help of designated buttons. It also has a reload key to refresh the data and a download key to download the preview on the local machine.
2. **PDF-** PDF preview allows the content to be previewed in PDF form. It has the same reload and download buttons as the JPEG pane. Other than that there's also a print option to print the preview file in real-time.
3. **HTML-** HTML preview pane allows the author to preview the file in HTML view. This view also has the refresh and download button for the same purpose.

There are many more types that can be chosen in the content types, under the CE Admin section.

Properties Pane: The properties pane shows the properties of the document. The properties pane starts with the name of the pane, then there is a toggle button to show all the properties.

The manager can easily edit the properties according to the requirement or search via the search bar. Also, there is an option to access, read or write revision comments in the designated area given.

History Pane: History Pane shows all the versions of this document that have been saved after doing some kind of change or another. The version also shows the information such as which user has edited the document and at what date-time.

There's a toggle switch on the top which enables and disables the view of autosave versions of the documents.

CONTINUE EDITING

Links Pane: The links pane shows all the referenced assets in the document. It shows the asset with its name, date of attachment, its properties that are transferred with the same, and the version of the asset. The user can also find the links from the search bar.

Searches

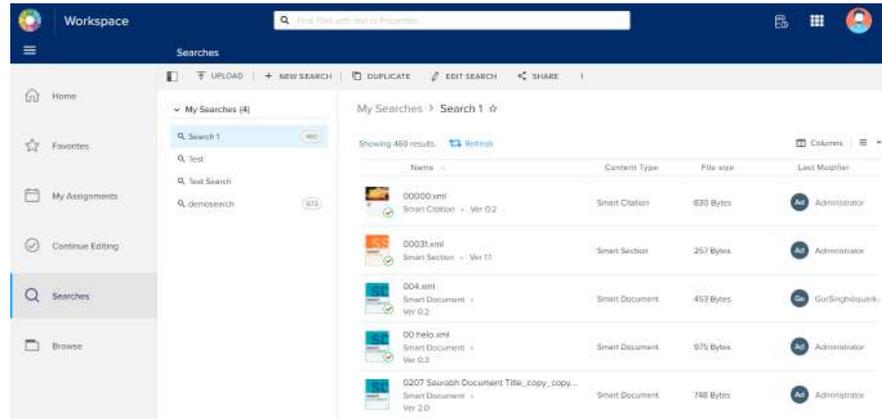
The searches are an important part of the Quark Content Enablement Platform as it analyses all the documents in the Quark Library and helps the user find the appropriate asset among the same file structure. The searches are part of the QE Workspace, where an admin or manager can easily create new searches according to the requirement.

The searches section UI starts with the page title on top, followed by a toolbar with the following operations:

- **Upload:** The Upload button uploads a new file into the Quark servers. The upload button gives 2 options: File and Folder. The File option opens a file manager popup which shows the local file system of the user's machine. When a file is chosen from the same, it is then uploaded to the server via another dialog box. This one asks the user to define which collection it will be part of and which version is going to be saved.
- **New Search:** This function allows the user to create a new search according to the requirements. The new search button opens a new dialogue box with search queries defined in it. More information on the new search is given in the next section.
- **Duplicate:** Creates a duplicate search of the selected search in the Quark server.
- **Edit Search:** Edits the already saved search, has the same dialog box and constraints as the 'create search'. After the edit, the previous search feature is replaced with the edited one.
- **Share:** Share search feature allows one user to share the custom search to share the same with another user saved in the Quark Content Enablement Platform.
- **Export Search Result:** Export search allows you to export all the search results from your search to the local computer in .csv format. These exported results can be downloaded from background task panel.
- **Delete:** As the name suggests, this option deletes the search from the Quark servers.

SEARCHES

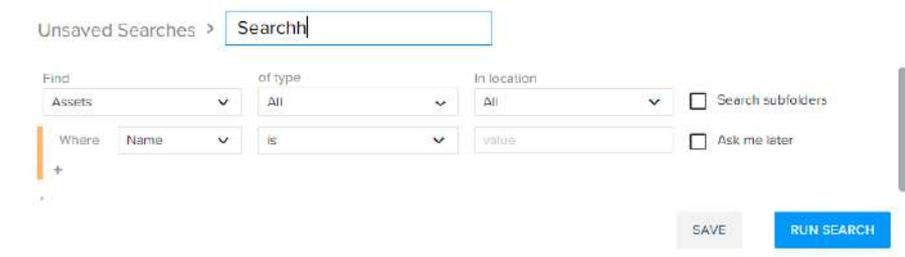
- **Hide Left Pane:** Hides the left pane and only allows the search query pane to be active.



New Search

The new search option allows a user, admin, or manager to create a new custom search to be applied on the collections and assets in the Quark server. To create a new search follow these steps:

- Click the New Search button from the top toolbar, the New search window will open on the main screen.
- Enter the name of the new search.
- Add the constraints in the constrains section as per the need.
- Select the 'Search Subfolders' check box if needs to search in the subfolders in the Quark server as well.

The screenshot shows the 'New Search' dialog box. At the top, there is a text input field for the search name, which contains the text 'Searchh'. Below this, there are several dropdown menus and checkboxes. The 'Find' dropdown is set to 'Assets', 'of type' is set to 'All', and 'In location' is set to 'All'. There are two checkboxes: 'Search subfolders' (unchecked) and 'Ask me later' (unchecked). Below these are two more dropdown menus: 'Where' is set to 'Name' and 'is' is set to 'is'. There is a text input field for 'value' which is currently empty. At the bottom right, there are two buttons: 'SAVE' and 'RUN SEARCH'.

- Save the search.

Search Constraints

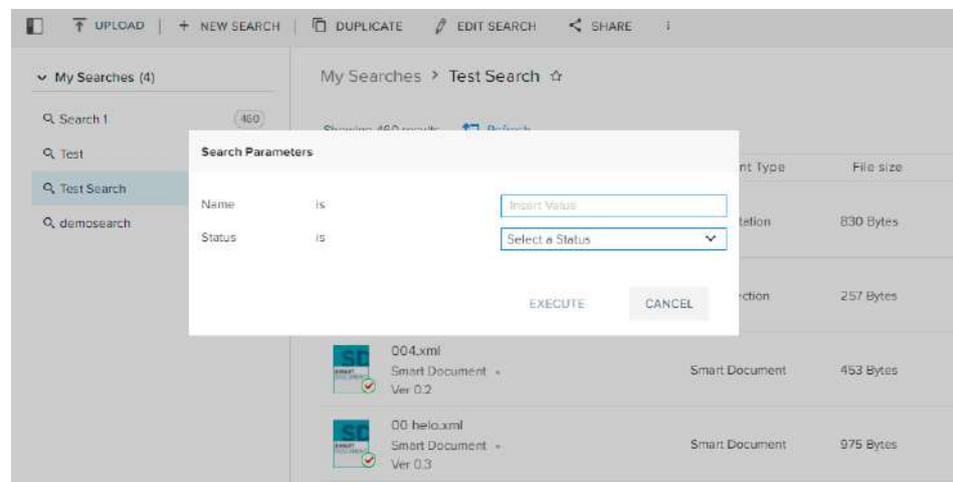
Search Constraints are a huge part of the 'Search' section in the Quark Content Enablement Platform. These constraints help complete a search in a user-defined way, via putting different restrictions on different attributes. These attributes can either be of collections or assets.

The search constraints that are used in the Quark Server Searches are:

- **Find**- Displays which type of target are you specifying i.e., Collections, Assets, or Both.
- **Type**- Defines the type of asset or collection into the system
- **Location**- To try the search in that particular location.

Ask Search

If you want the constraints of the search to be filled at the run-time instead of having it filled as the static search, then you can use 'Ask Search'. To use the ask search, the user or admin can click on the 'Ask' check box which allows you to skip the addition of data into the constraints field.

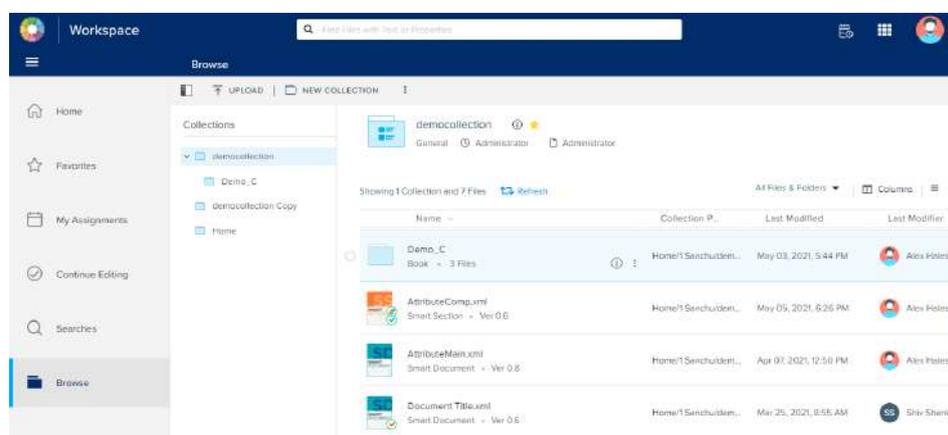


When used an Ask search in the file manager of the Quark Content Enablement Form, the dialog box containing the skipped constraints field appear on the screen, which is then to be filled by the user applying the search.

When filled with all the fields, the search resumes like a normal search and gives the appropriate results.

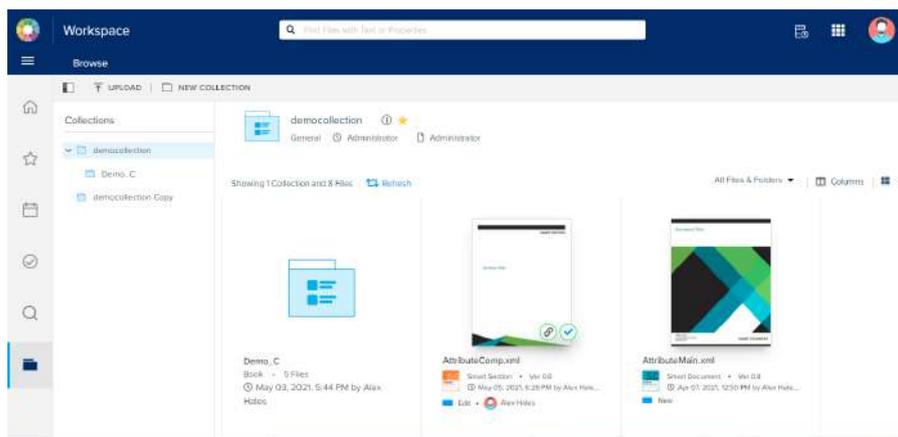
Browse

As discussed in the earlier section as well, the Browse Section opens up the Quark Platform File Manager from the server. All the files and folders whose permissions are given to the currently logged-in user can be browsed here. The folders or collections are shown in the left pane and the right pane shows all the documents inside that particular collection.



The browse section UI is one of the most complex ones in the entire Quark Content Enablement Platform.

- The page starts with the title bar in which the title of the page and a toolbar is installed. These tools will be defined in the sections after this one.
- After the toolbar, there exists a 2 pane screen in which the left pane shows all the respective collections which are already residing on the Quark servers. When any of these collections are clicked, their contents are shown in the right pane.
- In the right pane, all the contents and assets which are stored in the selected collection are visible. The name of the collection is written on the top of the pane with an information button and start button. Both these features are covered in the operations as well. After that, the name of the creator of that collection is written beneath.
- After that, there are options to filter the list according to either file, folders, or both.
- At last, there are options to either increase the columns in the list and view options to change the list view to card view and vice versa.



- The list contains all the contents and assets contained in the selected collection along with their attributes such as name, path, last modified, etc. These visible attributes can be increased or decreased by the 'columns' option mentioned above.

All the most common operations that can be performed in this browse section are mentioned in detail below:

New Collection

To create a new collection in the Browse section of Quark CE Workspace, follow the steps written below:

- Click the 'New Collection' button at the top of the page.
- After clicking the right side of the screen will show a new drawer. Enter the name of the collection in the larger text field provided.
- Choose the collection type from the **drop-down menu**.
- Click **Save**, After which other attributes will be visible.
- Change the attributes if and which are necessary.
- Click **done** and the collection is ready.
- Now add members (users or groups) into the collection according to the requirements.
- After adding the members, one can also add the specific workflow to the collection as well.

Add New Collection ✕

A collection can be a simple folder used to organise content, or power all your managed content.



Collection Name

General ▼

Add Collection Cancel

Add To Collections

To add something to the collection, check out the following steps:

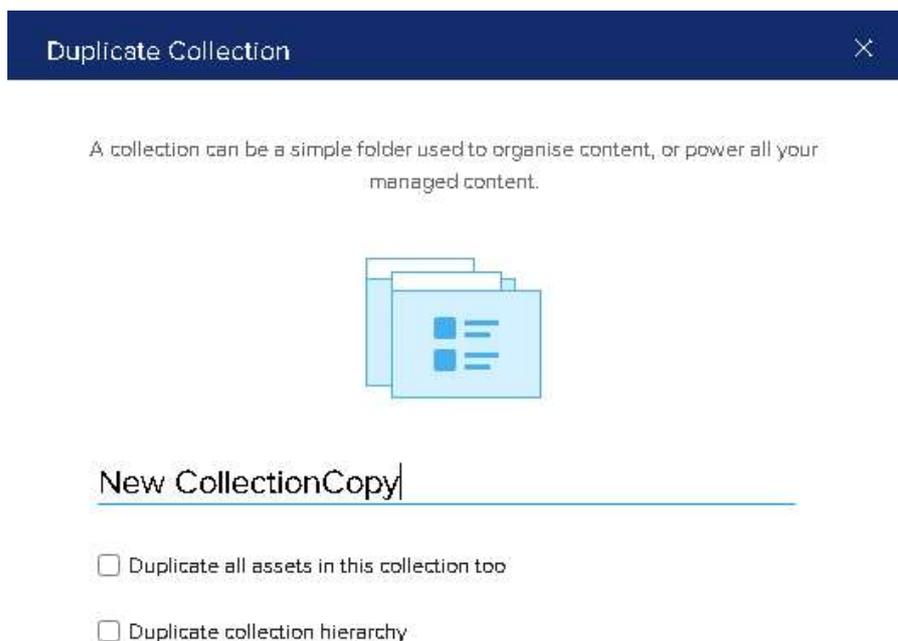
- Click the **'upload'** button in the top left of the screen.
- Select whether to upload file or folder
- **If selected a file**, the file manager of your local system will appear.
- Select the file to be uploaded and click the **'open'** button.
- **If selected a folder**, then the same file manager will appear.
- Select any of the folders from the local directory.
- Click **Open** to upload the same on the server.

Alternatively, user can also **drag and drop a folder, multiple files or single file in the browser window** and it will open a Save dialog where user can select the collection where to save the files/folders.

Collection Operations

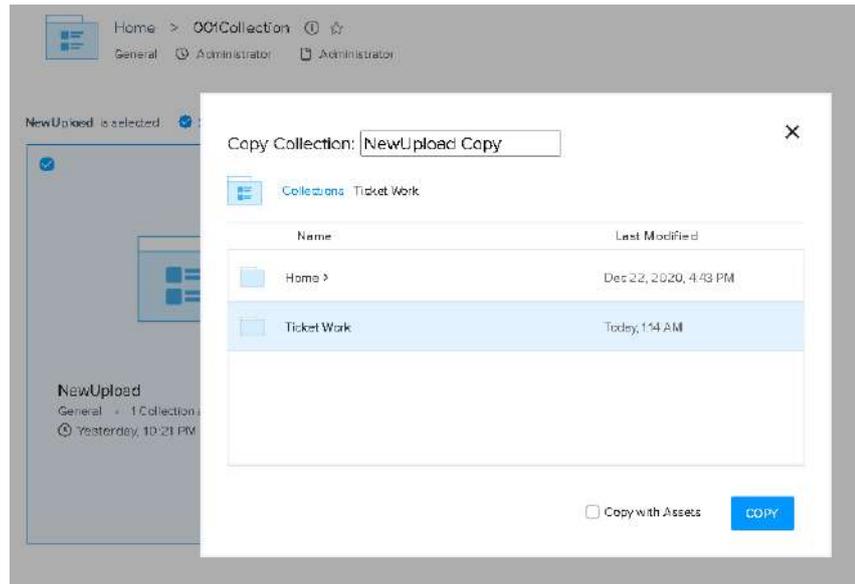
There are certain functions that can be performed with the collections

- **Duplicate:** Duplicates the current collection into the new one. This feature is limited to copying current collection in same location. Duplicate functionality comes with three further option:
 - Duplicate Collection Name only - if no option is selected, it duplicates the collection name and 'Copy' string is appended to the name. User has option to alter the name of duplicated collection.
 - Duplicate Collection Hierarchy - to duplicate all the collection structures contained in the collection.
 - Duplicate all collection assets in collection too - If this option is selected, 'Duplicate collection hierarchy' is selected automatically.

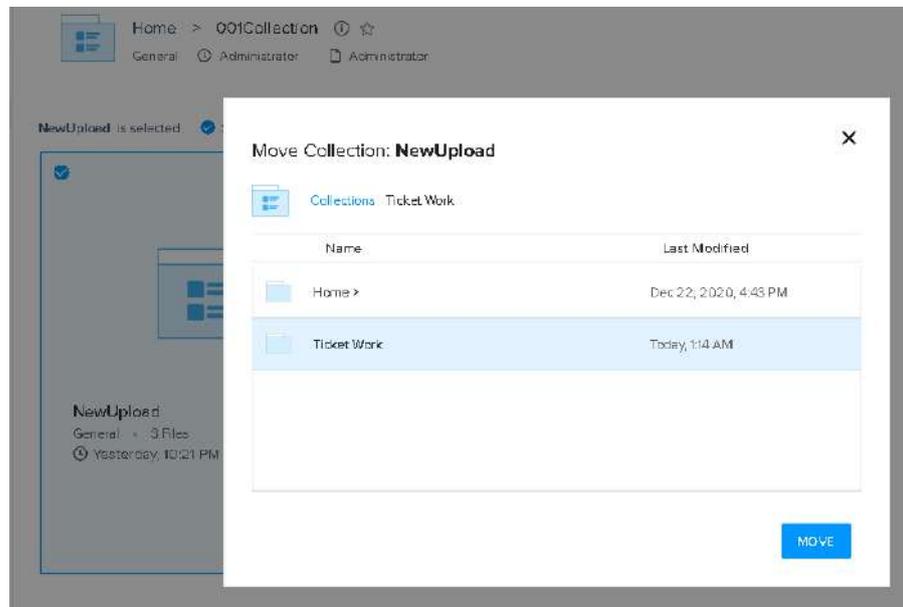


- **Copy:** This option is similar to duplicate with capability of choosing some other collection to copy the collection. Copy collection action create a background task and user is not blocked until the action is completed. Copy collection has further two features.
 - If Copy with Assets is selected, Collection is copied at new collection location with all the assets and collection hierarchy structure is maintained
 - If Copy with Assets is not selected, Collection is copied at new collection location maintaining the collection hierarchy and not assets are copied.

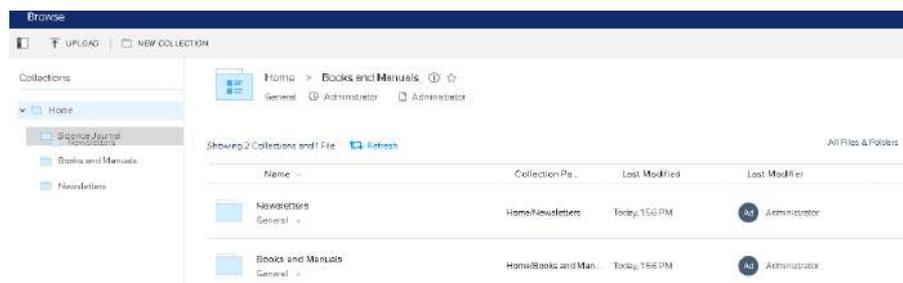
BROWSE

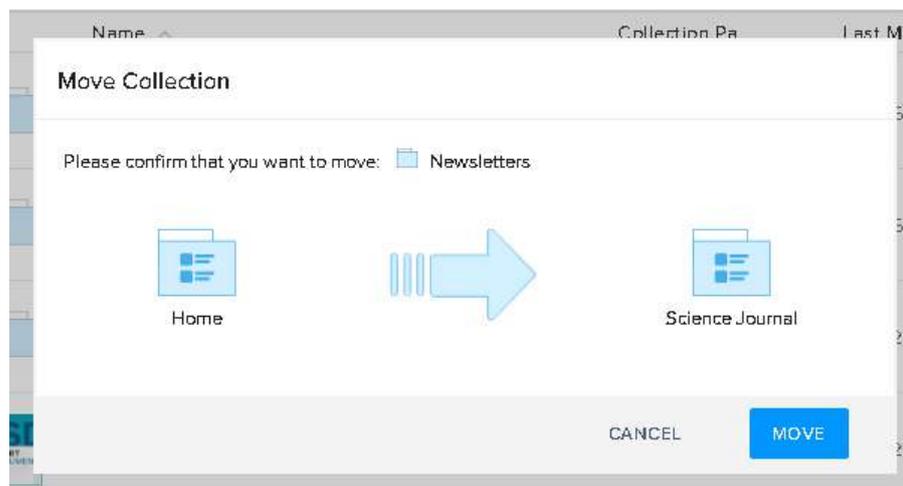


- **Move:** Move allows the user to move a collection from one path to another.



Alternatively, user has option to move collection using drag and drop in the collection browser panel following which a confirmation dialog will open.





- **Delete:** Delete the collection. The collection should be empty for delete action to complete and is given a prompt indicating the same.
- **Details:** This shows all the properties, workflows, and members assigned to the selected collection. This is explained ahead in detail.

View Assets and Collections

Assets stored inside the Quark servers in any collection can also be viewed in the 'Browse' segment of CE Workspace. The assets are stored within the Quark server. These assets or contents can be found when a collection is opened. When a user clicks any of the assets, a preview pane appears from the right side of the screen.

The collections however are already visible on the left tab of the screen. It shows all the collections in hierarchical order.

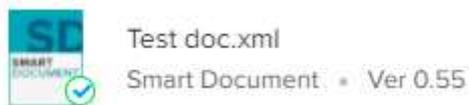
On this title bar, when clicked on the asset, there are the following functions and operations that can be used by the admin or author to control the asset itself:

- **Edit:** Edit allows the user to change the name or version of the asset.
- **Start Workflow:** This allows a user to start any allowed workflow on the given asset. The starting status and a user will be assigned to the asset according to the Admin itself.
- **Download:** Download the asset to the local file system.
- **Reindex:** Reloads and Reindexes the file on Quark Servers.
- **Discard:** Deletes the asset from the list of files.

There are certain symbols that are associated with the assets as well. These symbols help determine certain aspects of that asset without actually opening that asset.

These symbols are explained below:

- **Blue Tick:** The Blue Tick represents that the asset is currently being edited by the logged-in author himself. If a person sees a blue tick on the document, he or she has currently opened the document somewhere on their system. It is also confirmed when you hover the cursor over the blue tick.



- **Red Tick:** The Red Tick represents that the asset is currently being edited by another author. The author name who's currently editing the document is shown when we hover the cursor on the red tick.

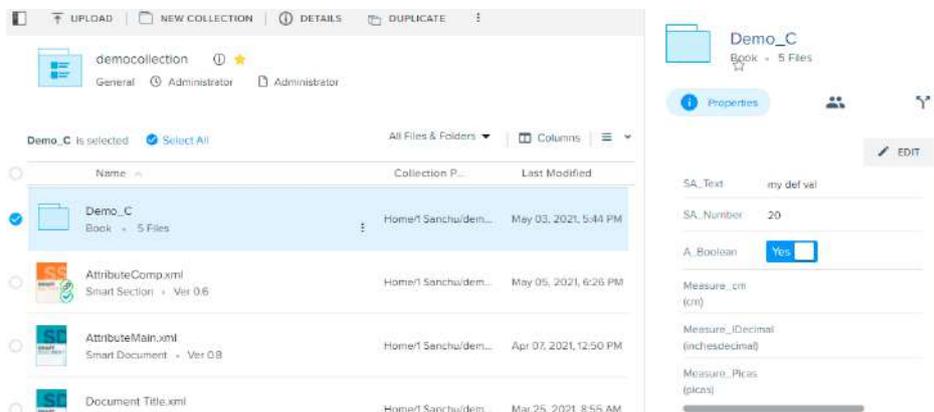


- **Link Symbol:** The link symbol represents that the asset is currently linked or referenced in another document.



View Collections

The View Collections option provides the user with the functionality to see collection details and properties. Not only that, there are many operations that can be performed while doing the same.



The collections are visible on the left tab of the screen and as well as in the sub-folders as well. All the collections inside the 'Home' folder can also be accessed from the right tab as well. To access the same, the user has to select any of the collections and click the details button.

The detail button opens the information pane from the right side of the screen. It has three main functions that can be applied to the selected collection. These functions are defined below:

Properties

The properties section allows the user to edit all the properties assigned to that specific collection. These properties can be seen by other users as well at the time of accessing the collection.

The screenshot shows a 'Collection Details' dialog box for a collection named 'Demo_C'. The dialog has a title bar with 'Collection Details' and a close button. Below the title bar, there's a folder icon, the name 'Demo_C', and 'Book • 5 Files'. A 'Properties' button is highlighted. Below it are 'CANCEL' and 'SAVE' buttons. The properties list includes: SA_Text (my def val), SA_Number (20), A_Boolean (Yes), Measure_cm (cm), Measure_IDecimal (inchesdecimal), and Measure_Picas (picas). A 'Show More' link is at the bottom right.

These properties are a part of the collection system itself so the number of properties will always be the same for all collections.

Members

The 'members' sections, as the name already suggests, allows the user to add other users and groups to the collection. This option is extremely useful to share a collection with other users so that they can access the selected collection as well.

When clicked on Members, a search bar appears in the pane which allows users to be searched by name. Along with it, there is a button 'Add/Remove'.

Collection Details ✕

 Demo_C ☆
Book - 5 Files

 Members 

✕ + ADD / REMOVE

0 Group · 29 Users

Name	Role
 Alex Hales  Alex	Administrator

Save Cancel

The users can click this button to add or remove a user from the collection.

Add Members ✕

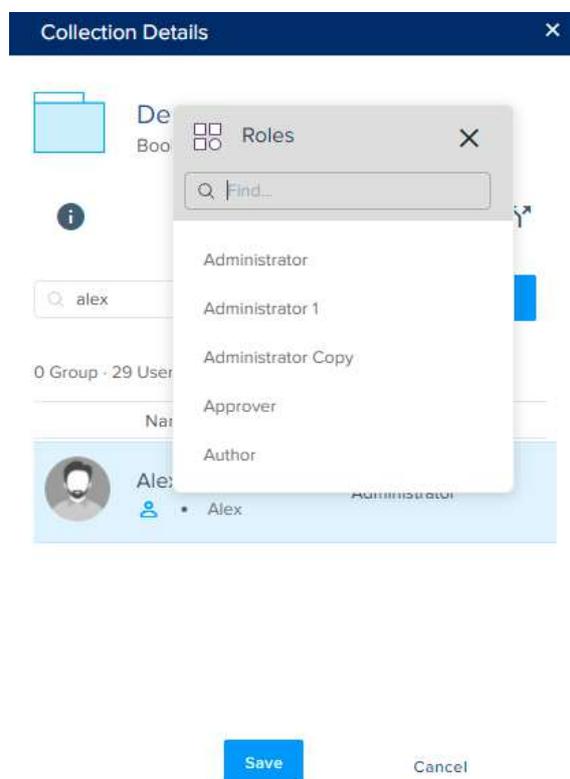
All ▼

0 Group · 29 Users

Name	Selected
 group10012  Administratc	<input checked="" type="checkbox"/>
 group1002  Administratc	<input checked="" type="checkbox"/>
 group10022  Administratc	<input checked="" type="checkbox"/>
 group811  Administratc	<input checked="" type="checkbox"/>
 group8117  Administratc	<input checked="" type="checkbox"/>

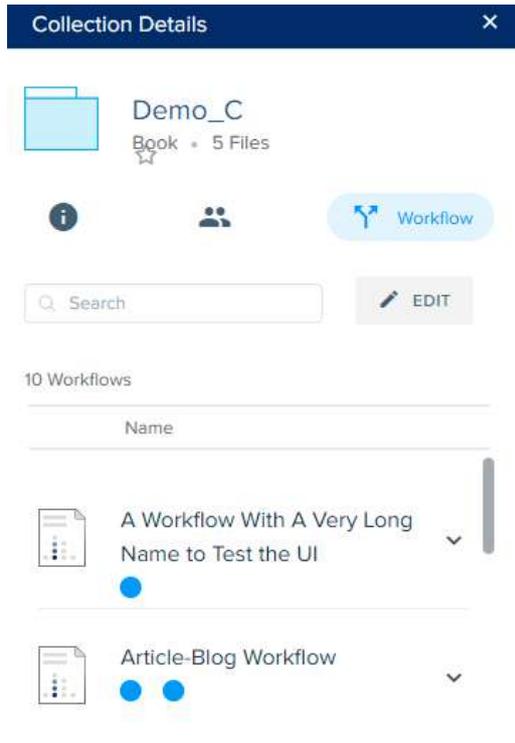
OK Cancel

A specific user can also be assigned a role accordingly through the drop-down menu which is present along with the username in the list. This drop-down allows users to choose any of the roles allowed in the Quark Content Enablement Platform.



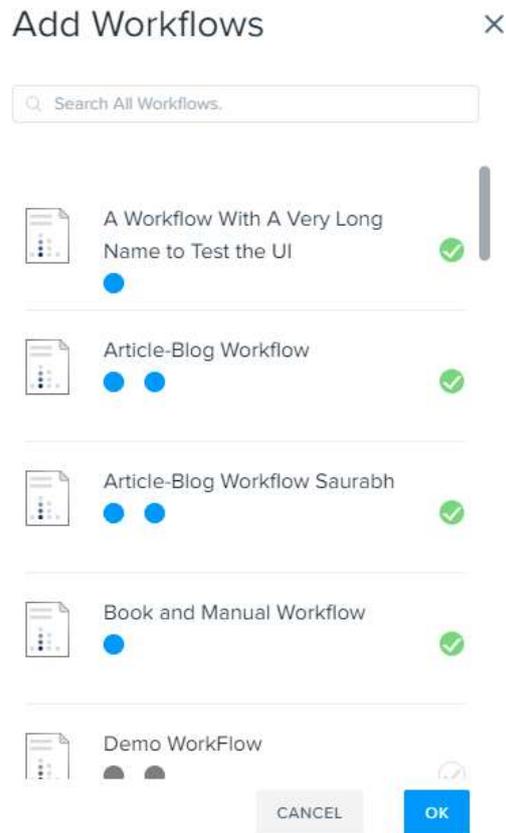
Workflows

The users can also add workflow to the collection as well. The collection can follow the specific workflow just like the asset. These workflows are already a part of the Quark system and can be added via this pane.



In the workflow pane, there exists a list of all the currently added workflows in the collection. There exists a search panel above the list to search workflow by its name. You can click the edit button to start editing this section.

As a user clicks the edit button, it gives the option to Add/Remove a workflow. Clicking this button shows all the workflows from the system, from which the user can select or unselect the workflows to add/remove them from the current collection.



After adding the desired workflows, a user can edit each workflow accordingly. The user can expand the workflow and add users to auto-route the workflow after each status.

Collection Details ✕

 **Demo_C**
Book • 5 Files

   Workflow

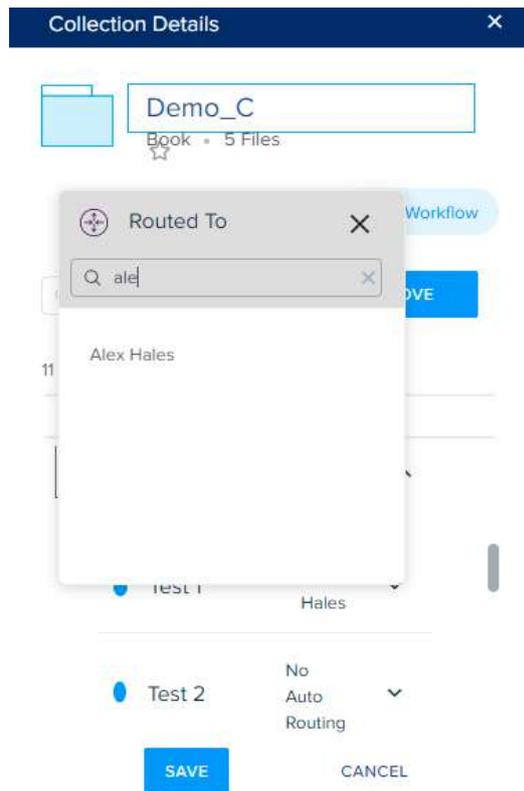
+ ADD / REMOVE

11 Workflows

Name	
 Demo WorkFlow ^	
<input checked="" type="radio"/> Test 1	Alex Hales v
<input checked="" type="radio"/> Test 2	No Auto Routing v

SAVE CANCEL

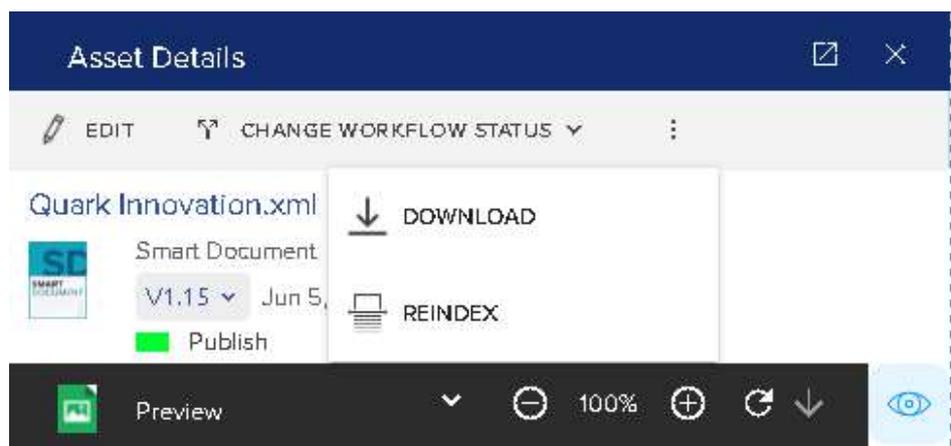
When the status is completed, another user will be assigned to the collection according to the user, chosen in the auto-routing.



After that, click 'save' to save all the changes done to the selected collection.

View Assets and Panes

When user clicks or select any single asset, the asset details pane opens up on the right side of browser. There blade menu show list of common operations, such as Edit, change or Start Workflow, Download Asset or reindex it.



Furthermore, user can choose specific version of asset and download it.

Asset Details [Close] [Share]

EDIT CHANGE WORKFLOW STATUS

Quark Innovation.xml ☆

Smart Document • Home

V1.15 Jun 5, 2021 by Administrator

Version	Action	Updated By	Date
Version 1.15	Publish	Ad	Updated By Administrator on Jun 5, 2021
Version 1.14	Review	Ad	Updated By Administrator on Jun 5, 2021
Version 1.13	Review	Ad	Updated By Administrator on Jun 5, 2021
Version 1.12	Review	Ad	Updated By Administrator on Jun 5, 2021

Document reviewed and ready to Publish

EDIT [Eye icon] [Info icon] [Refresh icon] [Link icon]

The screenshot shows the 'Asset Details' window for a document titled 'Quark Innovation.xml'. At the top, there is a dark blue header with the title and window controls. Below the header is a toolbar with an 'EDIT' button and a dropdown menu. The dropdown menu is open, showing a 'DOWNLOAD' option with a downward arrow icon. A yellow warning banner below the toolbar states 'Some actions may be disabled.' The main content area displays the document's metadata: 'Smart Document' with a 'Home' icon, version 'V1.14', and a date of 'Jun 5, 2021 by Administrator'. Below this, there is a 'Review' status indicator and the user 'Administrator'. A 'Show All' toggle is visible, along with a search box labeled 'Find by property...'. The 'Revision Comments' section is currently empty. On the right side, there are several icons: an information icon (i), a refresh icon, and a link icon. At the bottom, a table lists the asset's properties:

Id	1
Name	Quark Innovation.xml
Created	06/03/2021 03:15 PM
Last modified	06/05/2021 08:04 PM

There are multiple panes that allow other functionalities to an Admin to work around an asset. These are:

Preview Pane

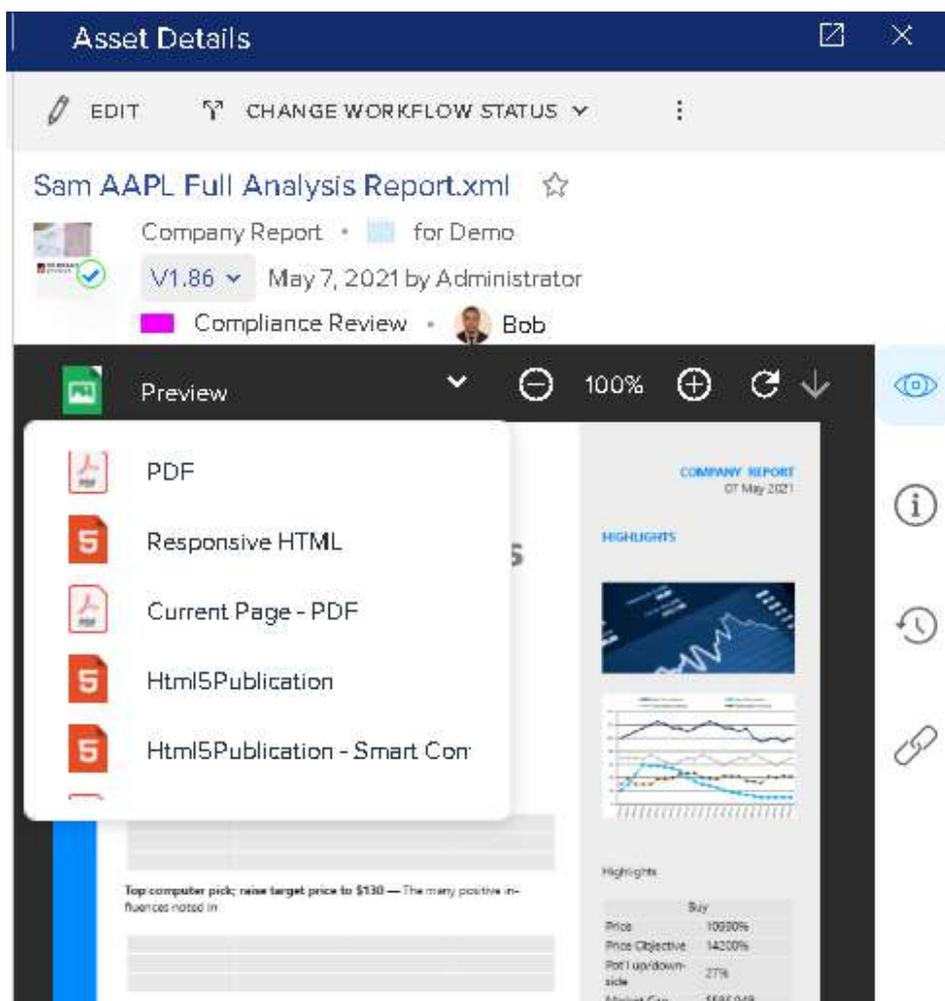
This feature is used to preview the file in multiple file formats. This is a step taken to ensure accuracy in the publishing of the document. The document preview can only be done in the associated automation channels, as per the content type of the asset.

Additionally, if there are multiple version of the asset, then user can also select the version of the asset from the versions dropdown that he wants to preview.

There are multiple types of file formats that an author can preview a file within the Quark Content Enablement Platform. These file formats and their previews are defined one by one below:

1. **JPEG-** Previews the document in the JPEG Image view. The previews sport a zoom option to either zoom in or out with the help of designated buttons. It also has a reload key to refresh the data and a download key to download the preview on the local machine.
2. **PDF-** PDF preview allows the content to be previewed in PDF form. It has the same reload and download buttons as the JPEG pane. Other than that there's also a print option to print the preview file in real-time.
3. **HTML-** HTML preview pane allows the author to preview the file in HTML view. This view also has the refresh and download button for the same purpose.

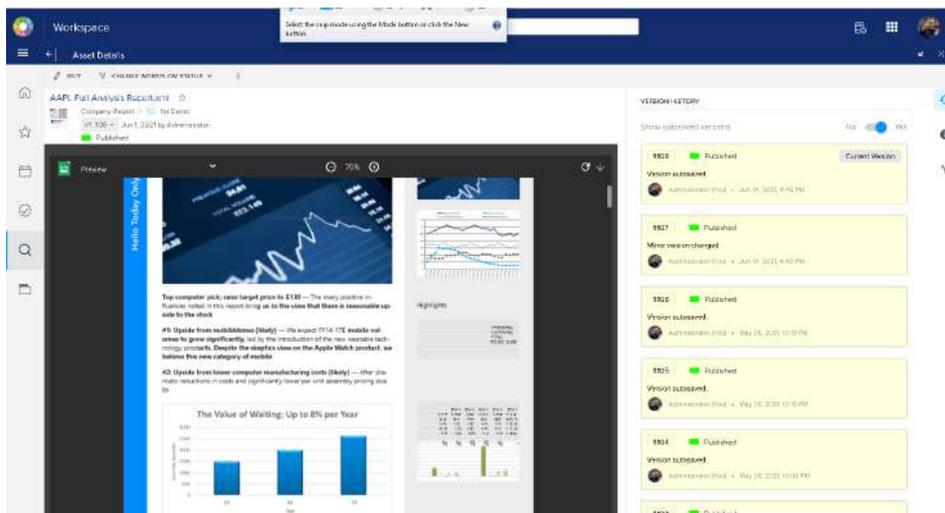
There are many more types (created/customized or predefined) that can be chosen in the content types, under the CE Admin section.



There's also an Expanded Preview Pane which offers additional details about the document. To check the expanded pane, click on the expand icon present besides the close button on the Asset Details Title Bar.

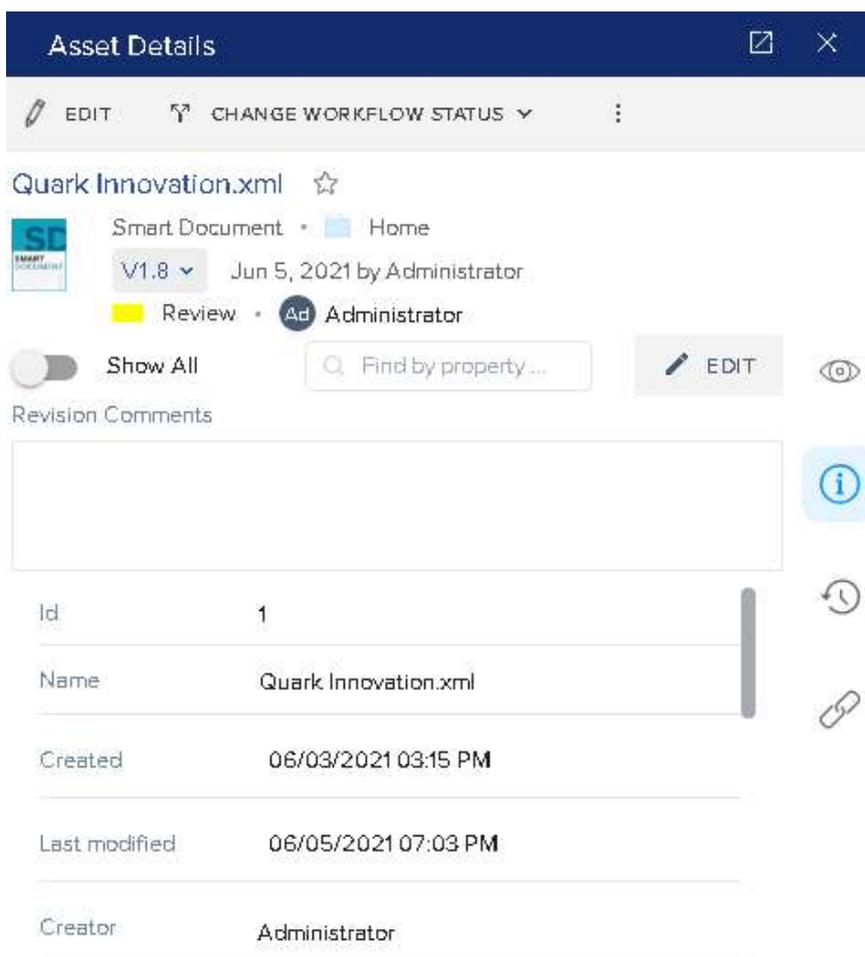


After clicking the button, the preview pane will extent to the full screen with two tabs. The first tab contains the preview itself which contains the same options as of the preview pane. The tab on the right shows all the versions in the history pane.



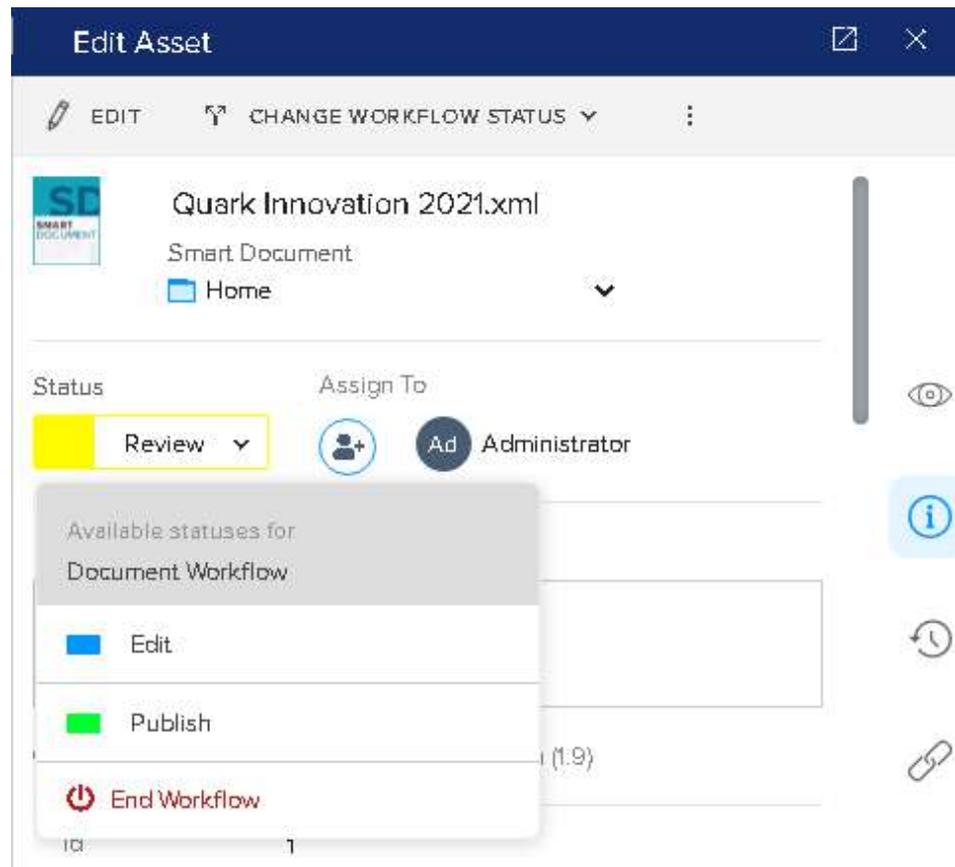
Properties Pane

The properties' pane shows the properties of the document. The properties' pane starts with the name of the pane, then there is a toggle button to show all the properties. The asset can be added to Favorites.

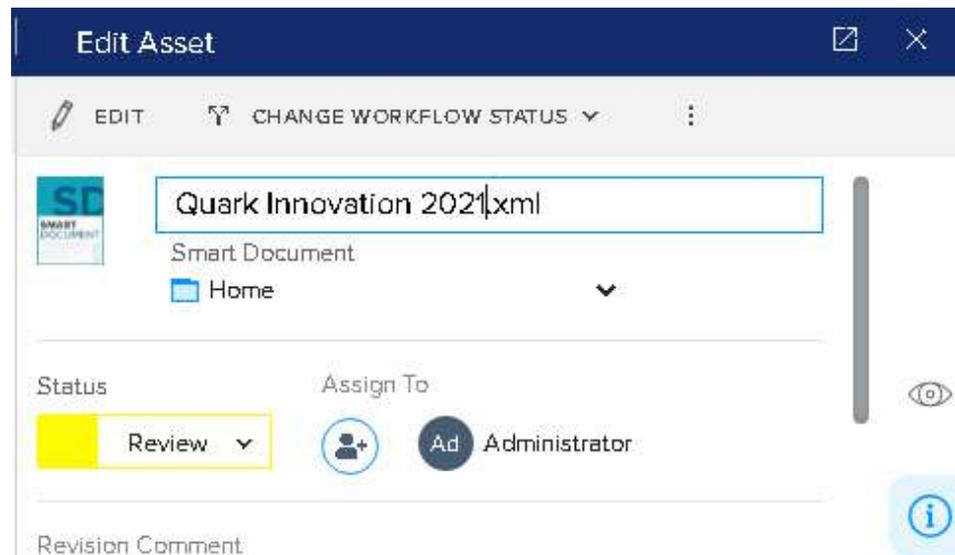


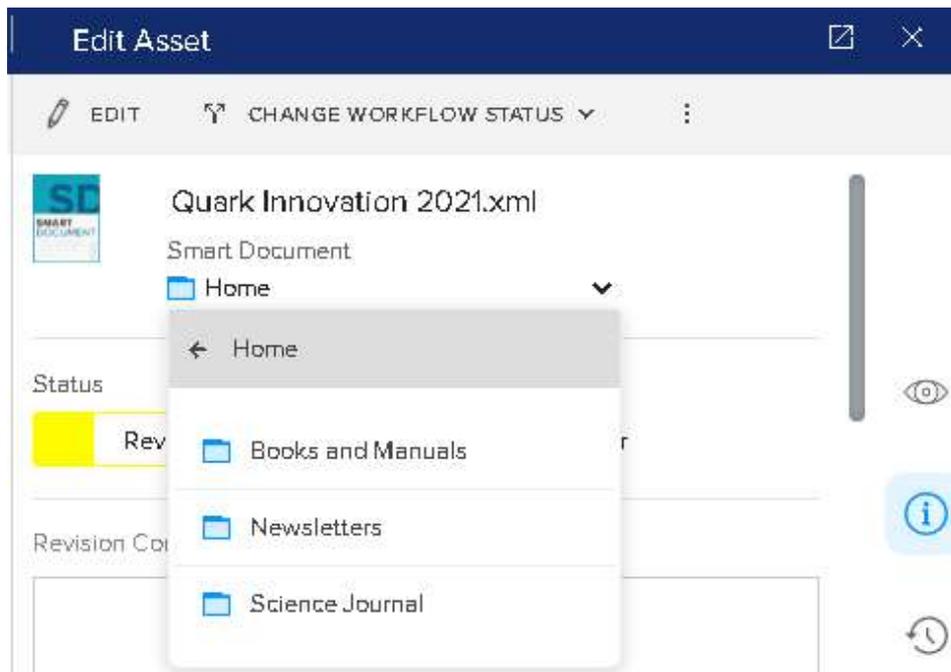
User can also edit the properties, change workflow status or assignment, End workflow and start different workflow by clicking the 'EDIT' button to get the document in Edit mode. Once in the Edit mode, the user can easily edit the

properties according to the requirement or search via the search bar. Also, there is an option to access, read or write revision comments in the designated area given.



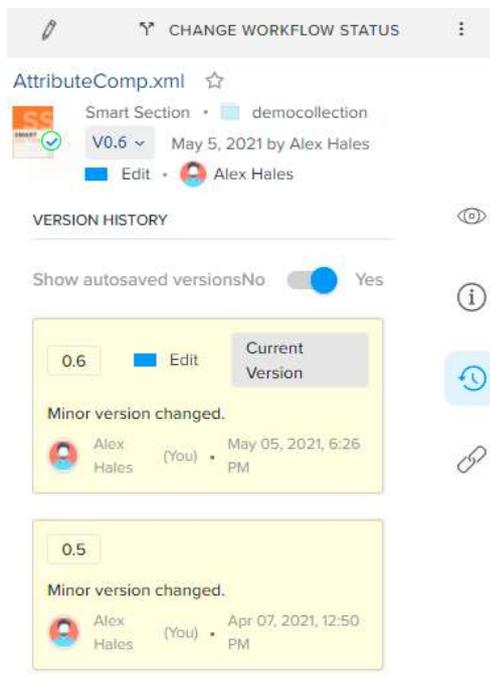
Furthermore, the asset can be renamed or its collection can be changed from here while the asset is in EDIT mode





History Pane

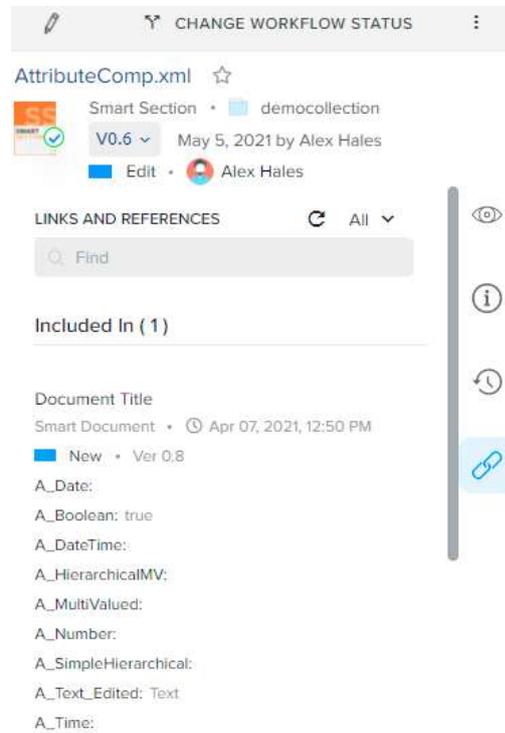
History Pane shows all the versions of this document that have been saved after doing some kind of change or another. The version also shows the information such as which user has edited the document and at what date-time.



There's a toggle switch on the top which enables and disables the view of autosave versions of the documents.

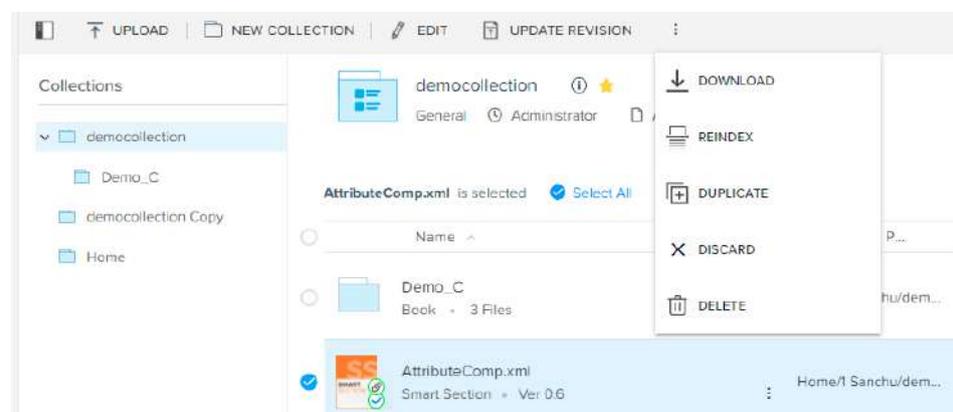
Links Pane

The links pane shows all the referenced assets in the document. It shows the asset with its name, date of attachment, its properties that are transferred with the same, and the version of the asset. The user can also find the links from the search bar.



Operations

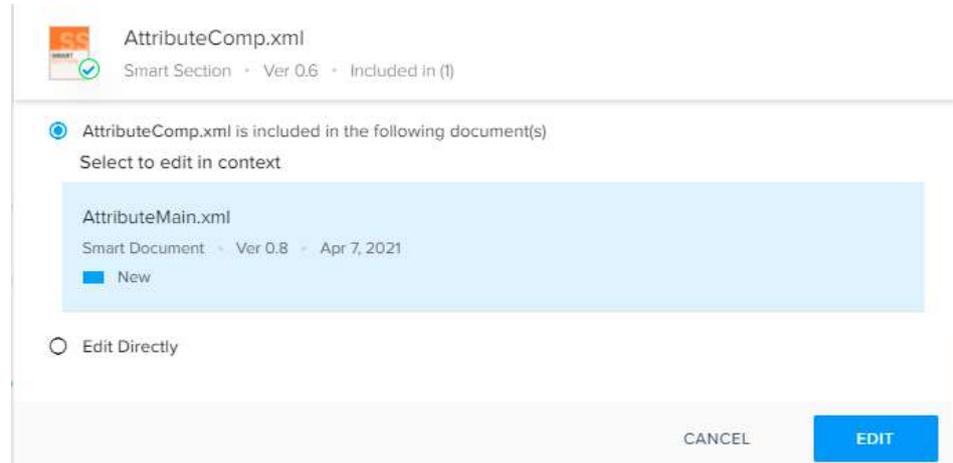
Certain operations can be performed on all the components in the browse section. These operations are already defined in the 'Continue Editing Section: [Operations](#)'



BROWSE

There is also a context menu present in the 'Smart Sections' type of content, which can be seen only in this specific content-type. This context menu only appears when a user clicks the 'edit' button from the menu.

The menu allows the user to edit the Smart Section which is already linked in a document. The menu gives two options to the users, either to edit the smart section directly from its source or to edit the same within the linked file.



If the user selects direct, it opens the smart section in the different window of the browser and allows the user to edit it.

If the user selects edit inside the document, it opens the document in the different window of the browse, allowing the user to edit it.

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