



# **Arts & Sciences**

## **Serena Collage**

Contributors – Introduction Course  
Version 1.0  
September 2007

University of San Francisco  
Academic and Enrollment Services / Web Services  
2130 Fulton Street  
San Francisco, CA 94117  
[www.usfca.edu](http://www.usfca.edu)



# Table of Contents

---

<b>Introduction.....</b>	<b>3</b>
Agenda.....	3
<b>Collage Solution .....</b>	<b>4</b>
What is the Serena Collage Solution? .....	4
Security and Collage.....	4
Collage – the Big Picture.....	4
<b>The Collage User Interface .....</b>	<b>5</b>
The Login Window.....	5
<b>Navigating in Collage.....</b>	<b>6</b>
Log into Collage Class Exercise.....	6
<b>Navigating the Content View .....</b>	<b>7</b>
Accessing the Content View.....	7
<b>Navigating with the Program Bar and the Project Button .....</b>	<b>8</b>
Using the Program Bar .....	8
Using the Project Button.....	8
Logging Out.....	8
Important Terms to Know .....	9
<b>Using Check In and Check Out .....</b>	<b>10</b>
What are Check In, Check Out, and Undo Checkout? .....	10
Using Check Out and Edit/Automatic Check Out.....	10
Using Check In & Undo Check Out.....	10
<b>Using the Internal Editor .....</b>	<b>11</b>
Overview of Adding Content .....	11
Overview of Importing an Image .....	12
Overview of Adding a Link.....	13
<b>Formatting Tools.....</b>	<b>14</b>
Overview of Formatting Tools .....	14
Overview of Formatting Tools (continued).....	15
Overview of Formatting Tools (continued).....	16
<b>Shadow Assets .....</b>	<b>17</b>
What are Shadow Assets?.....	17
How Collage Displays Shadow Assets.....	17
Converting Shadow Assets to Assets .....	17
<b>Adding Assets to Collage .....</b>	<b>18</b>
Ways to Add Assets in Collage .....	18
Uploading Assets.....	18
<b>Adding Assets to Collage, Continued .....</b>	<b>19</b>
Overview of Adding a New Asset.....	19

---

# Table of Contents

---

<b>Master Pages Overview .....</b>	<b>20</b>
What are Master Pages? .....	20
What are the Benefits of Master Pages? .....	20
Where Are Master Page Assignments Made? .....	20
<b>Applying a Master Page .....</b>	<b>21</b>
Associating a Master Page.....	21
<b>Metadata Overview.....</b>	<b>22</b>
What is Asset Metadata? .....	22
Examples of using Metadata.....	22
<b>Using the Site View .....</b>	<b>23</b>
What is the Site Structure? .....	23
Important Terminology.....	23
What is the Site Structure Used For?.....	23
<b>Working with Site Structures .....</b>	<b>24</b>
Site Structure Diagramming .....	24
Looking at Site Structures .....	24
<b>Adding Nodes in a Site Structure .....</b>	<b>Error! Bookmark not defined.</b>
<b>Moving Nodes in a Site Structure.....</b>	<b>26</b>
<b>Deleting Nodes from a Site Structure.....</b>	<b>27</b>
<b>Working with Asset Properties.....</b>	<b>28</b>
Viewing Asset Properties .....	28
Why View Asset Properties?.....	28
Touring an Asset Class Exercise .....	29
<b>Contributing Content through Collage.....</b>	<b>36</b>
What is Content Contribution? .....	36
What are Contribution Documents? .....	36
<b>Faculty and Staff.....</b>	<b>37</b>
Adding New Faculty or Staff.....	37
<b>Department News.....</b>	<b>39</b>
Adding a News Story.....	39
<b>Department Event.....</b>	<b>40</b>
Adding an Event.....	40
<b>Finding Assets.....</b>	<b>41</b>
Using the Search Feature.....	41
Creating a Custom Search Class Exercise .....	42
<b>Deploy Content (Optional) .....</b>	<b>43</b>
<b>Course Wrap-up.....</b>	<b>47</b>

---

# Introduction

---

## Agenda

### **Introduction Course for Contributors – 1 hours**

- Collage Overview
  - Collage Interface
  - Editing and Adding Content
  - Masterpages and Metadata
  - Site View and Structure
  - Advanced Properties
  - Faculty/Staff, News and Events
  - Finding Content in Collage
  - Optional Course Content
  - Conclusion
-

## Collage Solution

---

**What is the Serena Collage Solution?**

Serena Collage is an end-to-end web content management solution, providing full asset management, user and task management, content contribution, and deployment features.

---

**Security and Collage**

The security built into Collage is very flexible. If individual users or groups of users don't have permission to access certain functions, those functions do not appear to the user.

---

**Collage – the Big Picture**

Collage provides a solution by:

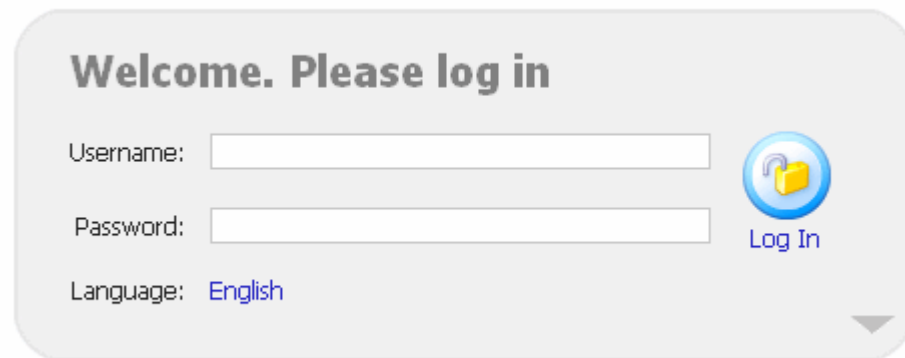
- Allowing Web teams to collaborate more effectively and manage files more efficiently
  - Increasing Web development productivity and quality
  - Providing content contributors simple, non-technical methods to submit content
-

## The Collage User Interface

---

### The Login Window

Collage is a Web application. To access it, you must access the correct http address and login to the application.



At the login screen you can also:

- View additional options
- Select a language for number and date formats (not for language translation)

**Please Note:** Collage supports **Firefox 1.5.0.x** for **MAC users** and **Internet Explorer 6.0** or **Firefox 1.5.0.x** for **PC users**. Please only use these browsers for the operating systems specified.

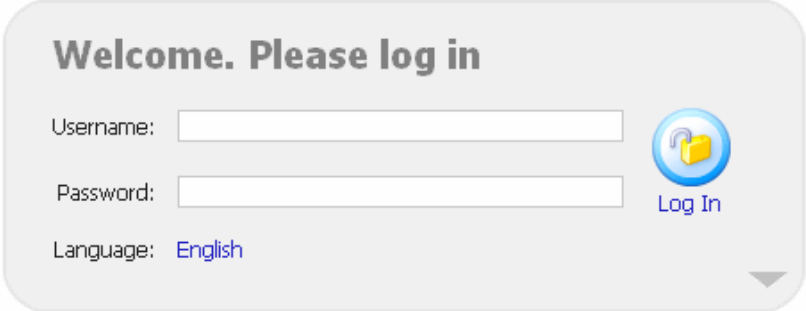
---

*Continued on next page*

## Navigating in Collage

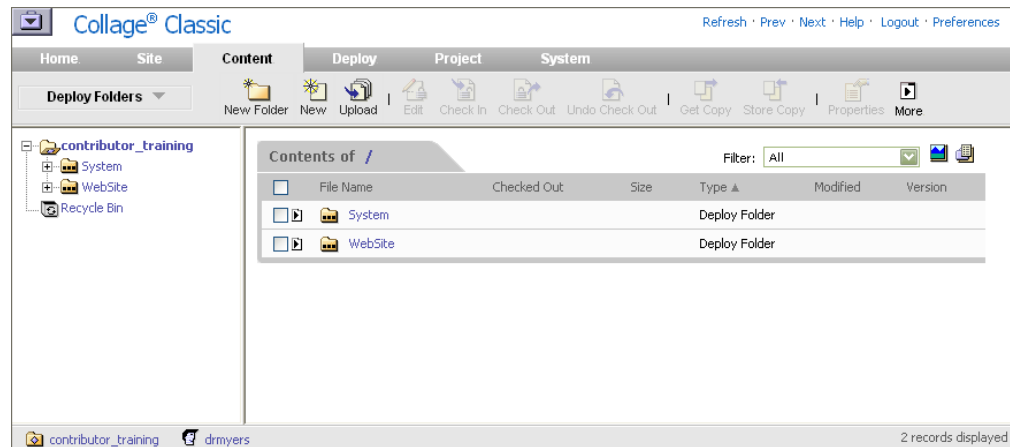
### Log into Collage Class Exercise

Follow along with the class as we tour the Graphical User Interface together.

Step	Action
1	Open a browser window.
2	<p>The address to enter may vary in each classroom setting. Your instructor will tell the server name to enter. Enter:  <a href="https://storm.usfca.edu">https://storm.usfca.edu</a></p> 
3	Enter the <b>Username</b> and <b>Password</b> . Note that these fields are case sensitive.
4	Press the <b>Login</b> button. A security message displays. This loads a temporary applet that is necessary to run Collage. If you do not, Collage will not function.
5	Check the box to the left of <b>Always trust content from Serena</b> .
6	Click Yes. The next time you log in to Collage, this window will not display, however, the applet will be loaded every time you log in.
7	<p>The Login Options display. A list of available projects displays. Select <b>Arts and Sciences</b> and click <b>Open</b>.</p> <p><b>Note:</b> It takes a few moments for the project to load.</p>

## Navigating the Content View

### Accessing the Content View



The **Content** view displays all of the content for the site. One of the conventions of the layout of the Collage interface is the sub-view. Each view has a number of sub-views. The sub-views that you see depend upon your permissions. On the left hand side above the project pane, you see a drop-down that takes you to the sub-view selections within each view. The sub-view selections for the Content view are **Deploy Folders**, **Work Cabinet**, **Contribution**, and **Search**.

Sub-view	Function
<b>Deploy Folders</b>	Deploy folders display the physical organization that is used to organize data for deployment to a web site. They may be organized in a number of different ways.
<b>Work Cabinet</b>	Contains a sub-set of the assets from the <b>Deploy Folders</b> . It's used to segregate specific files for your easy access. You or your team members can access specific Work Cabinets.
<b>Contribution</b>	Content Contributors can use the <b>Contribution</b> view to create and edit predefined types of contribution documents, as defined by the project managers and web designers.
<b>Search</b>	Allows you to do both simple and sophisticated searches for assets within the site project.

## Navigating with the Program Bar and the Project Button

---

### Using the Program Bar

In the upper right-hand corner, in the black bar called the **Program Bar**, there are a series of buttons that exist in every view. The Program Bar can be customized to show certain buttons. This will be covered in the preferences module.

[Refresh](#) · [Prev](#) · [Next](#) · [Help](#) · [Logout](#) · [Preferences](#)

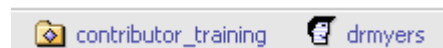
These buttons do the following:

Button	Function
<b>Refresh</b>	Refreshes your current browser pane
<b>Prev</b>	Goes to the previous page in your current browser window
<b>Next</b>	Goes to the next page in your current browser window
<b>Help</b>	Launches the online help from the Collage Server
<b>Logout</b>	Logs you out of the current project and takes you to the Collage Login screen
<b>Preferences</b>	Allows you to set preferences for your workstation display, browser options, content editors for assets, personal password, asset list options, and display the accessibility-enhanced online help

---

### Using the Project Button

In the bottom left-hand corner, there is a button that always exists in every view. The **Project** button allows you to switch to different projects without having to logout. You will be logged into the new project as the user that is shown to the right of the **Project** Button.



### Logging Out

Before you log out of Collage, you should be sure that all of your assets are checked in if you are done working on them. To log out of Collage, click the **Logout** button on the program bar. Be sure to log out rather than just closing your browser.

---

## Navigating with the Program Bar and the Project Button

### Important Terms to Know

Term	Definition
<b>Asset</b>	Any file or object that is stored in Collage.
<b>Contributor</b>	With Collage, website contributors can write and edit just the sections of a page for which they are responsible in an easy to use editing environment.
<b>Deploy</b>	Publishing a website so that users can view it with their browser.
<b>HTML / HTML Editor</b>	A language that your browser understands and translates so you may view a web page. There are a number of editing applications that make editing HTML easy even if you are not a “programmer” (such as Adobe Dreamweaver® and Microsoft FrontPage).
<b>Master Page</b>	A template that defines a Web page design.
<b>Metadata</b>	<u>User-definable</u> information about assets that is specific to the Web project. You can use metadata to search for assets and to store business-specific information about the assets.
<b>Node</b>	An element of a site structure such as a web page – you can apply Master pages to a node or set of nodes for a consistent visual presentation.
<b>Permissions</b>	The levels of rights that a user or group has within Collage.
<b>Properties</b>	Information about an asset such as its name, description, size, and details about its creation and most recent modification.
<b>Site Structure</b>	A hierarchical representation (similar to an organizational chart) that depicts a website’s organization.
<b>Version</b>	The state of the file when it is checked into Collage.

## Using Check In and Check Out

---

### What are Check In, Check Out, and Undo Checkout?

The check in, check out, and undo check out functions exist in the **Site** and **Content** views. These functions allow you to take control of the desired asset and locks out other users from making changes at the same time that you are making changes.



There are a number of ways to perform a check in or check out. You will learn additional ways that this can happen automatically just by editing an asset.

---

### Using Check Out and Edit/Automatic Check Out

When you want to make changes, you must first perform a check out procedure. The **Edit** button and function will automatically check out the selected asset and launch the editor associated with that asset as defined in your **Preferences**.

---

### Using Check In & Undo Check Out

When you have completed the changes and want to save the new version into Collage, you must perform a check in. Each time you perform a check in a new version of the asset is created.




If you wanted to undo changes to a file that you edited or if you checked out the incorrect file, you can use the **Undo Check Out** button to return the asset back to its original state. Use this button instead of **Check In** so that a new version is not created upon check in.

---

## Using the Internal Editor

### Overview of Adding Content


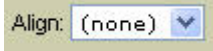

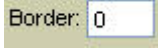

Follow the instructions below to add or edit content.

Step	Action
1	Click on the <b>Content</b> view   <b>Deploy Folder</b> sub-view.
2	Navigate to the folder that contains the file. Click on the file name to open and check-out.  <b>Note:</b> You can also place a check in the box next to the file and click the <b>Edit</b> button at the top or click on the arrow next to the file and select <b>Edit</b> .
3	Once the file opens, click inside the page to see your formatting tools. Add or edit your text.  
4	Once you are finished updating your file, click the <b>Save</b> button.
5	Next, click on the <b>Exit</b> button to close and check the file back in.  <b>Note:</b> If you still see the lock  next to the filename once the window has closed, click on the lock to check the file in.
6	Click on the <b>Approve</b> icon  to have your changes appear in USFconnect.

## Adding Images

### Overview of Importing an Image


Follow the instructions below to import an image.

Step	Action
1	Click in the page to see your formatting tools. 
2	Place your cursor where you would like to add an image.
3	Click on the <b>Image</b> button at the top.
4	The <b>Insert Image</b> window will open. You can add images that been previously imported into Collage or import a new image. Navigate to the folder where you would like to import the image.
5	To import a new image, click on the <b>New Image</b> button.
6	Browse for the image on your local machine and click <b>Open</b> . <b>Note:</b> Here are the image formatting options available: <b>Align</b> (left, right, center)  <b>Padding</b> around the image (horizontal & vertical)  <b>Image Border</b>  <b>Image Label</b> (on mouse over) 
7	Click <b>OK</b> and the image should now appear in the page.

## Adding a Hyperlink

### Overview of Adding a Link

Follow the instructions below to add a link to the page.

Step	Action
1	Click in the page to see your formatting tools. 
2	Highlight the text that you would like to link.
3	Click on the <b>Link</b> button at the top.
4	The <b>Title</b> window will open. You can insert previously added links or create a new link. Navigate to the folder where you would like to add the new link.
5	Click on the <b>External</b> tab.
6	Click on the <b>New Link</b> button.
7	In the name field, give the URL a title.
8	In the URL field, select the proper prefix and type in the web address.
9	Click <b>OK</b> .
10	Next, select <b>New window</b> in the Target field. <b>Note:</b> This will open a new window when users click on the link from USFconnect.
11	Click <b>OK</b> and the text that was highlighted should now be a link.
12	Click on the <b>Preview</b> tab to test the link. <b>Note:</b> If you have not saved the file, you will be prompted to do so.

## Formatting Tools

### Overview of Formatting Tools

Contributors can use the Collage Contribution authoring environment to apply a complete range of HTML formatting to their content.



Collage provides the following formatting tools:








Tool	Button	Description
Spell		Checks the spelling in the current field, and suggests corrections or alternates if any are available.
Bold		Bolds selected text, if it is allowed for the current field.
Italic		Italicizes selected text, if it is allowed for the current field.
Underline		Underlines selected text, if it is allowed for the current field.
Color		Applies a font color to selected text. The font colors that contributors can apply in each field are defined by project managers and web designers in the document definition file. Clicking this button displays a list of all possible colors.
Size		Changes selected text to a different font size. The font sizes that contributors can apply in each field are defined by project managers and web designers in the document definition file. Clicking this button displays a list of all possible sizes.

*Continued on next page*

## Formatting Tools, Continued

### Overview of Formatting Tools (continued)

Collage provides the following formatting tools, continued:






Tool	Button	Description
<b>Font</b>		Changes selected text to a different font. The fonts that contributors can apply in each field are defined by project managers and web designers in the document definition file. Clicking this button displays a list of all possible fonts.
<b>Style</b>		Applies a pre-defined style to the current paragraph or heading, such as cascading style sheet styles. The styles that contributors can apply are defined by web designers in the document definition file. Clicking this button displays a list of all possible styles.
<b>Alignment</b>		Aligns selected text to the left, right, or center. Web designers determine whether or not you can apply alignment formats to text in different contribution fields.
<b>Indent</b>		Indents the current paragraph, if it is allowed for the current field.
<b>Outdent</b>		Removes indents for the current paragraph, if this is allowed for the current field.
<b>Image</b>		Enables you to browse for and insert an image to the selected point in the text, if this is allowed for the current field.
<b>Link</b>		Enables you to define and insert an HTML link to the selected point in the text, or to convert selected text into an HTML link, if this is allowed for the current field.

*Continued on next page*

## Formatting Tools, Continued

### Overview of Formatting Tools (continued)

Collage provides the following formatting tools, continued:

Tool	Button	Description
<b>Table</b>		Enables you to define and insert a table to the selected point in the text, if it is allowed for the current field. You can also select an existing table and modify it. You can define the number of rows and columns, the width of each column, the width of borders, cell padding, and cell spacing.
<b>List</b>		Converts the current selection to a bulleted or numbered list item, if this is allowed for the selected field.
<b>Anchor</b>		Enables you to insert an HTML anchor in text fields in which anchors are permitted.
<b>Content</b>		Inserts a pre-defined, reusable content snippet. Web designers define the available snippets in the contribution asset file. Clicking this button displays a list of all available snippets. This is very useful for inserting content that is commonly reused, such as copyright statements or contact information.
<b>Forms</b>		Enables you to insert or edit an HTML form.

## Shadow Assets

---

### What are Shadow Assets?

Shadow assets are placeholders for files that assets refer to or are dependent on, but don't yet exist in Collage. Collage examines HTML tags for any file references, and displays the referred files. For example, if you add a file to Collage that contains a link to a file called `index.html` which hasn't yet been added to Collage, `index.html` will appear as a shadow asset.

This allows you to immediately see all files which an asset depends on, and determine whether any additional files need to be added to Collage.

---

### How Collage Displays Shadow Assets

Collage distinguishes shadow assets by displaying their names in italic:

**Shadow asset**  *index.html*

---

### Converting Shadow Assets to Assets

You can convert a shadow asset to an actual asset in any of the following ways:

- If the actual assets do not yet exist in Collage, by uploading the actual files.
  - If the actual assets already exist in Collage, redirect the references to the actual assets.
  - Redirect the references to any other asset in Collage.
-

## Adding Assets to Collage

---

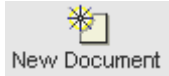
### Ways to Add Assets in Collage

There are several ways to add assets to your site including:

1. **Content** view | **Deploy Folder** sub-view.

Add a new asset  to the **Deploy Folder** in the **Content** view.

2. **Content** view | **Contribution** sub-view.

Add a new asset  from the **Contribution** sub-view in the **Content** view.

3. **Site** view > **Current Structure** sub-view.

Create a new node  in the **Site** view.

---

### Uploading Assets

Upload is a versatile command that allows you to perform a number of actions, depending on what you are uploading and what kinds of assets you

have chosen to upload. Use the **Upload**  function when you want to do one of the following:


- Add one or more existing files or directories to Collage, and create new assets from the files
  - Check in new versions of assets that are already in Collage
  - Convert “shadow assets” into actual file assets. (Shadow assets are files that have been referred to by other assets, but have not yet been loaded into Collage. Shadow assets can also be resolved using a wizard available in the **Content** view | **Deploy Folder** sub-view.)
-

## Adding Assets to Collage, Continued

---

### Overview of Adding a New Asset

Follow the instructions below to add an asset.

Step	Action
1	Navigate to the folder where you would add a new page.
2.	Click the <b>New</b> button. 
3	In the name field type the page name. Ex. new_page.html <b>Note:</b> Use underscores instead of spaces and do not use special characters.
4	Click <b>OK</b> .
5	Click on the file name to edit the page.

---

## Master Pages Overview

---

### What are Master Pages?

Collage master pages are templates that define the basic page design. They can contain navigation bars, borders, and other design elements, and ensure consistency of design across your site.

---

### What are the Benefits of Master Pages?

The benefits of using master pages include:

- A master page can be assigned to another master page
  - You can apply a master page to a single page, a group of pages, or to the entire site
  - A default master page can be assigned to all nodes in your site structure to ensure a consistent design over the entire site
  - You can assign different master pages for different sections while still ensuring that each section has a consistent look
- 

### Where Are Master Page Assignments Made?

Master pages can be assigned in a variety of places:


- A master page can be assigned to a group of pages in the **Site** view
  - Master pages can be assigned on a page-by-page basis for each asset in the **Properties** window in the **Content** view or in the **Site** view
-

## Applying a Master Page

---

### Associating a Master Page

Follow along as the instructor demos how to associate a master page with a single node.

Step	Action
1	Click on the Triangle  to open the drop down-list and select <b>Properties</b> for the selected file. The <b>Properties</b> dialog box appears. Select the <b>Properties</b> view if needed.
2	Click the <b>Check out</b> button
3	Select the desired master page from the <b>Applied Master-Page</b> drop-down list.
4	Click <b>Apply</b> .
5	Click the <b>Preview</b> button.
6	When all changes are made to the properties file, click the <b>Check In</b> button.
7	Close the <b>Properties</b> window and approve the file.

---

## Metadata Overview

---

### What is Asset Metadata?


Asset metadata is information about assets that is specific to your project. Metadata allows you to associate specific information with specific assets, which you can use to label and search for assets.

---

### Examples of using Metadata Class Exercise

You can use metadata to define the site navigation used on your pages.

Follow the instructions below to apply Metadata.

Step	Action
1	Click on the Triangle  to open the drop down-list and select <b>Properties</b> for the selected file. The <b>Properties</b> dialog box appears. Select the <b>Properties</b> view if needed.
3	Select the <b>Metadata</b> sub-view.
4	Click the <b>Check Out</b> button.
5	The <b>section</b> metadata option has a dropdown. Select the department.  <b>Note:</b> This metadata adds the left navigation.
	Select the department for the <b>folder</b> metadata.  <b>Note:</b> This metadata is used for undergraduate and graduate programs in Arts and Sciences.
6	Click the <b>Apply</b> button.
7	Click on the <b>Preview</b> tab.  The left navigation links will display.
8	Click the <b>Check In</b> button.
9	Close the Properties window and approve the file.

---

## Using the Site View

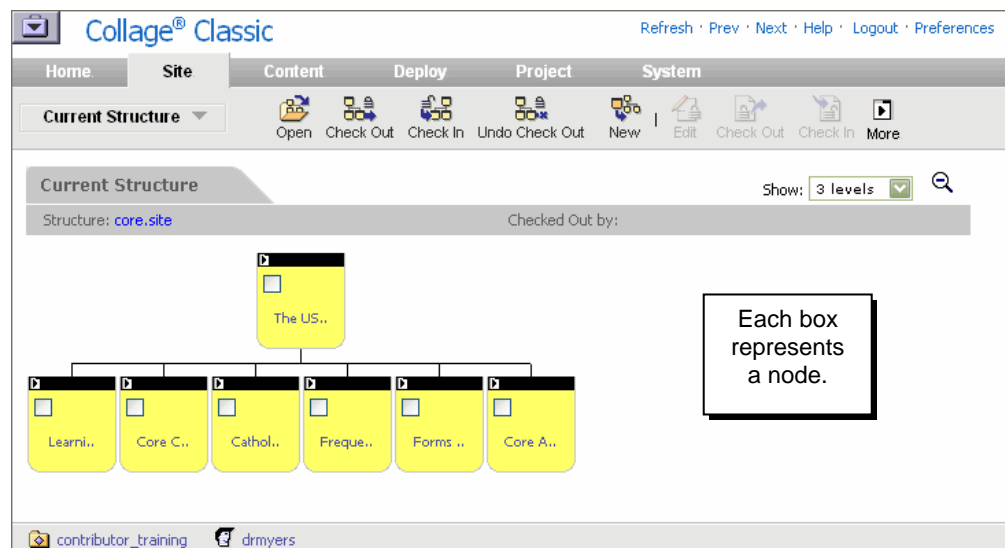
### What is the Site Structure?

The site structure is a hierarchical representation of a website's organization. Like an organizational chart, it presents the site in tiers and illustrates how different parts of the site are related to each other.

### Important Terminology

**Node:** An element in a site structure.

The illustration below shows that any element of a site structure is a node.



### What is the Site Structure Used For?

Using the **Site** view in Collage, you can:

- Visualize the information hierarchy in a way that the physical file organization may not be
- Define relative relationships between site elements that can be used to build navigation functionality, using the components
- Group related assets together to simplify master page assignments

**Notes:** You must have permission to access the site view to perform these functions.

You can move nodes within a site structure without having to worry about how the assets are organized in the deploy folders.

## Working with Site Structures

---

### Site Structure Diagramming

Good site planning begins with a site architecture diagram. The diagram enables planners to identify each section of the site by department or by topic and to analyze the structure of the site before it's built.

A site structure also helps site architects and designers easily reorganize a site. The hierarchical structure enables users to quickly identify and move an entire section or specific group of pages to a different part of the site.

---

### Looking at Site Structures Class Exercise

Follow along in class as we look at a site structure.


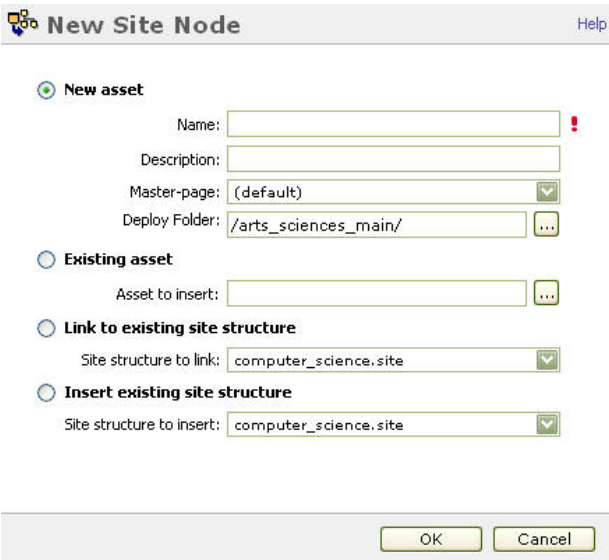
Step	Action
1	From the <b>Content</b> view, navigate to your department folder.
2	Click on the ' <b>department_name</b> '.site file to open the <b>Site Structure</b> view
3	This shows a site architecture diagram.  <b>Note:</b> Pages within a site structure are referred to as having a parent – child relationship.

---

## Adding Nodes in a Site Structure

### Adding New Nodes Class Exercise

Follow along and complete this class exercise:

Step	Action
1	<p>Click the <b>New</b> button  to create a new node in the site structure.</p>
2	<p>The <b>New Site Node</b> dialog appears.</p>  <p>Select <b>Existing Asset</b>.</p> <p><b>Note:</b> You can also add an existing asset, link to an existing site structure, or insert an existing site structure.</p>
3	Click the browse button and locate the asset you would like to add.
4	Click on the file name to select the file.
5	Click <b>OK</b> .
6	Click <b>OK</b> again to add the node to the site structure
	<b>Note:</b> You will need to move the node to your desired location.

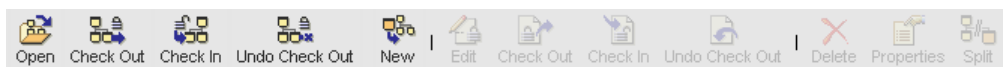
## Moving Nodes in a Site Structure

### Moving Nodes Class Exercise


You can move a node to a new position in the site structure. To move nodes within the site structure, you must first check out the site.

#### Note:

The **Site** view buttons shown below are separated into site and node options. The shaded options on the left are for the site structure. The options to the right are for nodes.



Use the following steps to move a node.

Step	Action
1	Select the checkbox for the node that needs to be moved. <b>Note:</b> You do not have to check out the nodes to move them.
2	Hover the mouse over the bottom portion of the node you would like to move your node next to. 
3	Click on the directional arrow to move the node to its new location. <b>Note:</b> If you move a parent page that has a child page, all the pages will move.


## Deleting Nodes from a Site Structure

---

**Deleting a Node Class Exercise** Now you will delete a node. Deleting nodes does not delete the asset from the content view.

Make sure that you have the site structure checked out if you want to delete a node.

Follow along as we perform the next steps:

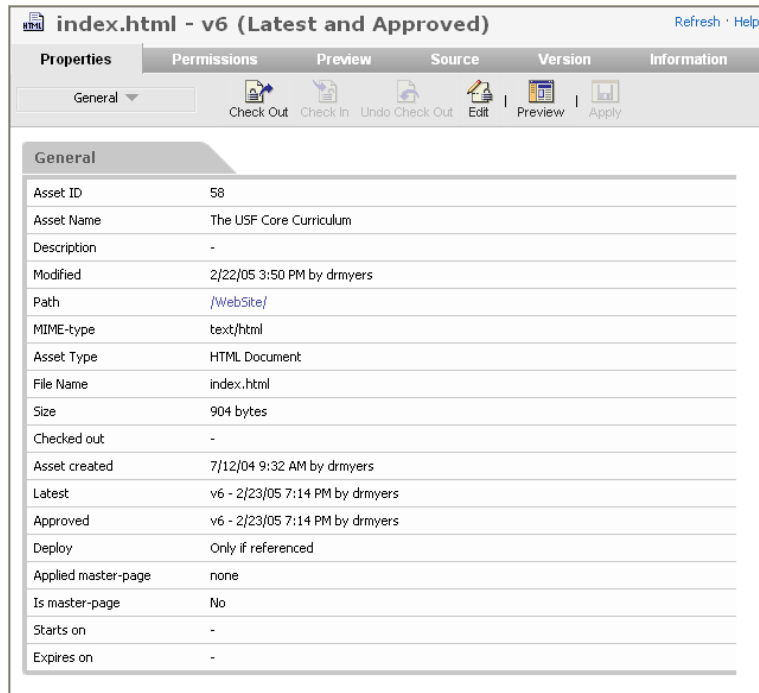
Step	Action
1	Select the checkbox for the node you would like to delete.
2	<p data-bbox="548 785 857 814">Click the <b>Delete</b> button.</p>  <p data-bbox="548 848 1382 953"><b>Note:</b> You can delete one node or several nodes by selecting the checkbox for each node and choosing the <b>Delete</b> button. Also, if you delete a parent node, the children will be deleted as well.</p>

---

## Working with Asset Properties

### Viewing Asset Properties

Every asset has Properties that give additional information about the asset. In the example below, notice that the asset is an HTML file. The additional views give more information.



General	
Asset ID	58
Asset Name	The USF Core Curriculum
Description	-
Modified	2/22/05 3:50 PM by drmyers
Path	<a href="#">/WebSite/</a>
MIME-type	text/html
Asset Type	HTML Document
File Name	index.html
Size	904 bytes
Checked out	-
Asset created	7/12/04 9:32 AM by drmyers
Latest	v6 - 2/23/05 7:14 PM by drmyers
Approved	v6 - 2/23/05 7:14 PM by drmyers
Deploy	Only if referenced
Applied master-page	none
Is master-page	No
Starts on	-
Expires on	-

### Why View Asset Properties?



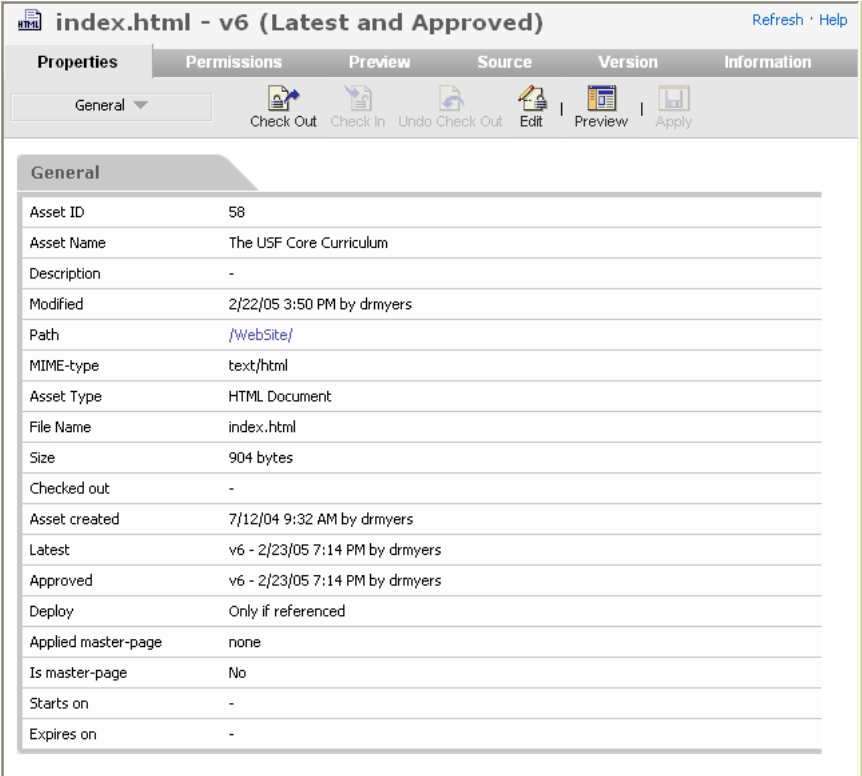
View asset properties when you want to:

- View and update information about an asset, such as its name, description, and details about its creation and most recent modification
- View and update metadata
- Modify an asset's versions
- View information about an asset's dependencies, such as other assets that it refers to (via links), and which assets have links that refer to it
- Find out when an asset has been deployed to a web server
- View a file asset's source code for text-based files such as HTML or JSP
- Change a file asset's master page usage
- Find versioning information and/or rollback to previous versions

## Working with Asset Properties, Continued

### Touring an Asset Class Exercise

Follow along as we tour the index.html asset.

Step	Action																																						
1	Navigate to <b>Content</b> view   <b>Deploy Folders</b> sub-view and select the <b>index.html</b> page in the department folder.																																						
2	Click on the Triangle  next to the file and select <b>Properties</b> . The properties for the file displays.																																						
3	<p>Check out the file by clicking on the <b>Check Out</b>  button. Now you can make changes to the file properties.</p>  <p>The screenshot shows the 'index.html - v6 (Latest and Approved)' dialog box with the 'General' tab active. The 'Check Out' button is highlighted in the toolbar. The 'General' tab contains the following information:</p> <table border="1"> <thead> <tr> <th colspan="2">General</th> </tr> </thead> <tbody> <tr><td>Asset ID</td><td>58</td></tr> <tr><td>Asset Name</td><td>The USF Core Curriculum</td></tr> <tr><td>Description</td><td>-</td></tr> <tr><td>Modified</td><td>2/22/05 3:50 PM by drmyers</td></tr> <tr><td>Path</td><td>/WebSite/</td></tr> <tr><td>MIME-type</td><td>text/html</td></tr> <tr><td>Asset Type</td><td>HTML Document</td></tr> <tr><td>File Name</td><td>index.html</td></tr> <tr><td>Size</td><td>904 bytes</td></tr> <tr><td>Checked out</td><td>-</td></tr> <tr><td>Asset created</td><td>7/12/04 9:32 AM by drmyers</td></tr> <tr><td>Latest</td><td>v6 - 2/23/05 7:14 PM by drmyers</td></tr> <tr><td>Approved</td><td>v6 - 2/23/05 7:14 PM by drmyers</td></tr> <tr><td>Deploy</td><td>Only if referenced</td></tr> <tr><td>Applied master-page</td><td>none</td></tr> <tr><td>Is master-page</td><td>No</td></tr> <tr><td>Starts on</td><td>-</td></tr> <tr><td>Expires on</td><td>-</td></tr> </tbody> </table>	General		Asset ID	58	Asset Name	The USF Core Curriculum	Description	-	Modified	2/22/05 3:50 PM by drmyers	Path	/WebSite/	MIME-type	text/html	Asset Type	HTML Document	File Name	index.html	Size	904 bytes	Checked out	-	Asset created	7/12/04 9:32 AM by drmyers	Latest	v6 - 2/23/05 7:14 PM by drmyers	Approved	v6 - 2/23/05 7:14 PM by drmyers	Deploy	Only if referenced	Applied master-page	none	Is master-page	No	Starts on	-	Expires on	-
General																																							
Asset ID	58																																						
Asset Name	The USF Core Curriculum																																						
Description	-																																						
Modified	2/22/05 3:50 PM by drmyers																																						
Path	/WebSite/																																						
MIME-type	text/html																																						
Asset Type	HTML Document																																						
File Name	index.html																																						
Size	904 bytes																																						
Checked out	-																																						
Asset created	7/12/04 9:32 AM by drmyers																																						
Latest	v6 - 2/23/05 7:14 PM by drmyers																																						
Approved	v6 - 2/23/05 7:14 PM by drmyers																																						
Deploy	Only if referenced																																						
Applied master-page	none																																						
Is master-page	No																																						
Starts on	-																																						
Expires on	-																																						

*Continued on next page*

## Working with Asset Properties, Continued

---

### Touring an Asset Class Exercise (continued)

**Note:**


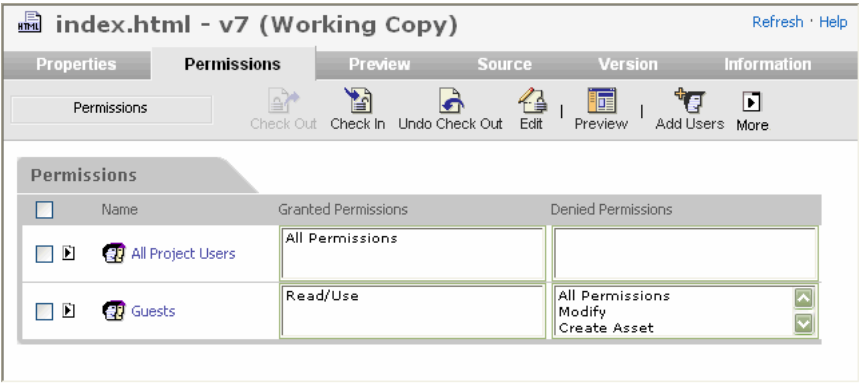
A number of fields are system generated. The following fields can be modified:

Field Name	Property Description
<b>Asset Name</b>	The name of the asset. <b>Note:</b> The Asset Name controls the page and link name
<b>Description</b>	A description of the asset.
<b>File Name</b>	The file name of the asset.
<b>Deploy</b>	The deployment property or condition (Always, Never, Only if Referenced).
<b>Applied master-page</b>	Identifies which masterpage has been applied to the asset.
<b>Is master-page</b>	Identifies if the file is a master page. Masterpages will be discussed later in more detail.
<b>Starts on</b>	When the asset will be included in the deployment activities.
<b>Expires on</b>	When the asset is no longer included the deployment activities.

*Continued on next page*

## Working with Asset Properties, Continued

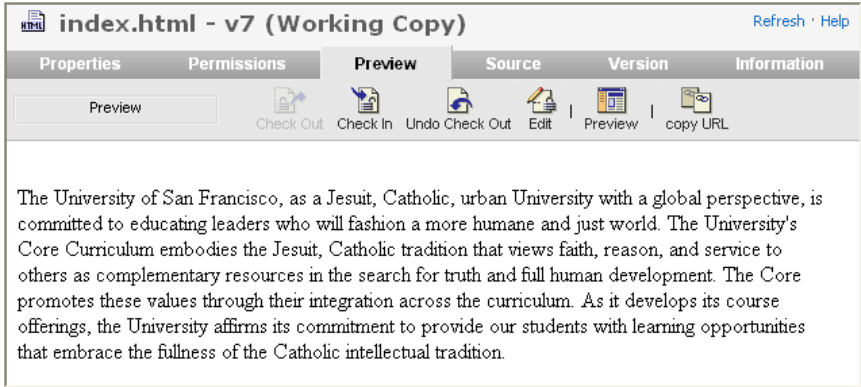
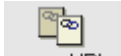

### Touring an Asset Class Exercise (continued)

Step	Action
4	<p>Change the <b>Description</b> to Core Curriculum and make sure that the <b>Deploy</b> field is set to <b>Always</b>. Click on the <b>Apply</b> button.</p> 
5	<p>Click on the <b>Permissions</b> tab. The <b>Permissions</b> view displays:</p>  <p>From this view you can edit permissions for this asset.</p>

*Continued on next page*

## Working with Asset Properties, Continued


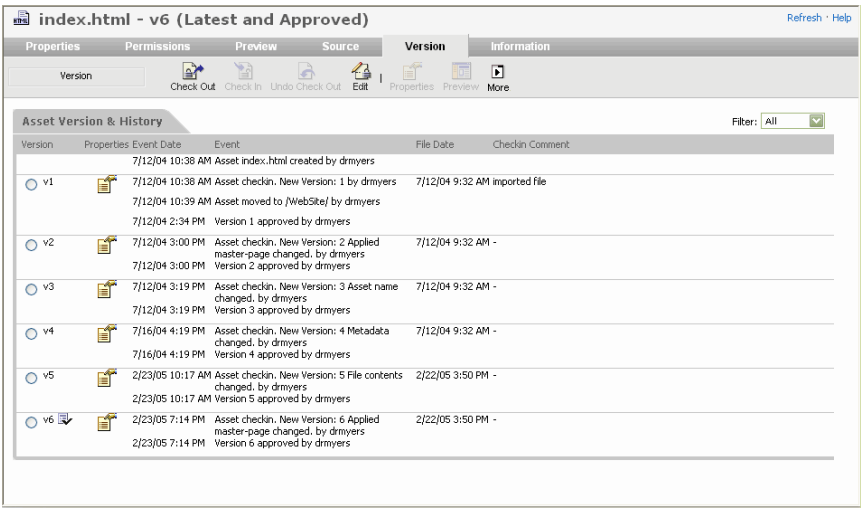
### Touring an Asset Class Exercise (continued)

Step	Action
6	<p>Click the <b>Preview</b> tab. The asset displays.</p>  <p>The University of San Francisco, as a Jesuit, Catholic, urban University with a global perspective, is committed to educating leaders who will fashion a more humane and just world. The University's Core Curriculum embodies the Jesuit, Catholic tradition that views faith, reason, and service to others as complementary resources in the search for truth and full human development. The Core promotes these values through their integration across the curriculum. As it develops its course offerings, the University affirms its commitment to provide our students with learning opportunities that embrace the fullness of the Catholic intellectual tradition.</p> <p><b>Note:</b> You can also click the <b>copy URL</b> button  from the <b>Preview</b> tab. This copies the preview URL for the asset and allows you to paste it into an e-mail, asset editor such as Dreamweaver, or another browser window. You can then generate a preview version of the document elsewhere.</p>
7	<p>Click on the <b>Preview</b> button  (which exists in the other tabs as well) to launch another browser window to preview the asset.</p>
8	Close the <b>Preview</b> window.
9	Click the <b>Source</b> tab.

*Continued on next page*

## Working with Asset Properties, Continued

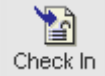
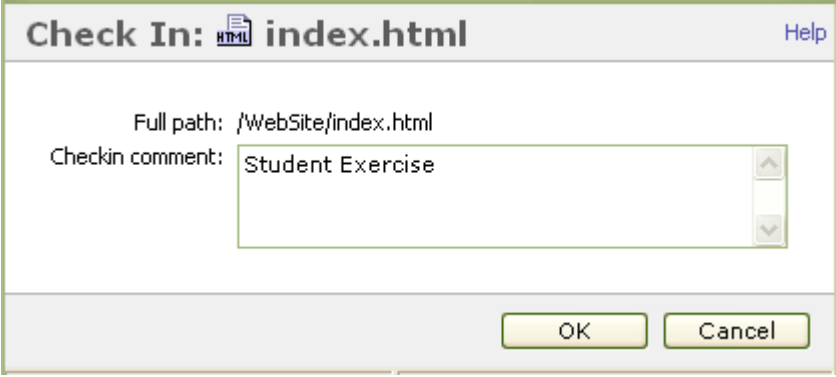

### Touring an Asset Class Exercise (continued)

Step	Action
10	<p>The source tab displays the HTML code for the file. View the information and take note of the highlighted links further down the page.</p> <p><b>Note</b> If you want to edit the file, choose the <b>Edit</b>  button. The editor defined in your <b>Preferences</b> to edit this type of file opens the file for modifications.</p> <p>You can't edit <b>Source</b> code from this view. You can only display source code for text file formats, such as HTML and JSP.</p>
11	<p>Click the <b>Version</b> tab. The versions of the file are displayed.</p>  <p>From this view you can check out, edit, and approve any asset version.</p>

*Continued on next page*

## Working with Asset Properties, Continued


### Touring an Asset Class Exercise (continued)

Step	Action
12	Check the file back in using the <b>Check In</b>  button.
13	Enter a check in note that says: “ <b>Student Exercise</b> ” and click on <b>OK</b> . 
14	You can make a previous version of the asset the latest version of the asset using the <b>Rollback</b> function. This is useful if the current version is not ready, or if there is some problem with the current version of the file.  Using the radio button, select the previous version of the asset (the one before you made the description change).
15	Select the <b>Rollback</b>  button. The <b>Rollback</b> button copies the selected previous version and creates a new version, which becomes the new latest version. All previous versions are also retained. Go back and look at the versions again and notice how Collage highlights the current version.

*Continued on next page*

## Working with Asset Properties, Continued

### Touring an Asset Class Exercise (continued)

Step	Action								
16	<p>Click the <b>Information</b> tab. There are three sub-views:</p> <table border="1" data-bbox="548 541 1404 911"> <thead> <tr> <th data-bbox="548 541 797 611">View</th> <th data-bbox="797 541 1404 611">Displays</th> </tr> </thead> <tbody> <tr> <td data-bbox="548 611 797 709"><b>Referred From</b></td> <td data-bbox="797 611 1404 709">All references or links to this asset from other assets within the website.</td> </tr> <tr> <td data-bbox="548 709 797 772"><b>Refers To</b></td> <td data-bbox="797 709 1404 772">All references to other assets from this asset.</td> </tr> <tr> <td data-bbox="548 772 797 911"><b>Deploy History</b></td> <td data-bbox="797 772 1404 911">When this asset has been deployed based upon the deploy maps that have been created for it.</td> </tr> </tbody> </table>	View	Displays	<b>Referred From</b>	All references or links to this asset from other assets within the website.	<b>Refers To</b>	All references to other assets from this asset.	<b>Deploy History</b>	When this asset has been deployed based upon the deploy maps that have been created for it.
View	Displays								
<b>Referred From</b>	All references or links to this asset from other assets within the website.								
<b>Refers To</b>	All references to other assets from this asset.								
<b>Deploy History</b>	When this asset has been deployed based upon the deploy maps that have been created for it.								
17	Click each sub-view to see the information for <b>index.html</b> .								
18	Close the <b>Properties</b> window for <b>index.html</b> . If you are part of an approval process, you can also approve the asset from the <b>Deploy Folder</b> sub-view.								
19	Select the checkbox for the <b>index.html</b> file.								
20	Click the <b>Approve</b>  button.								
21	The current version of the file will display.								

## Contributing Content through Collage

---

### What is Content Contribution?

With Serena Collage, website contributors can write and edit just the sections of a page for which they are responsible in an easy to use editing environment. The editing environment provides a full set of HTML formatting tools and displays pages as they will actually appear after they are deployed. Web designers can determine how much custom HTML formatting contributors can apply to their content, and can also set up the pages to display default content for all of the different editable sections.

Contributors contribute content from the **Content** view | **Contribution** sub-view.



### What are Contribution Documents?

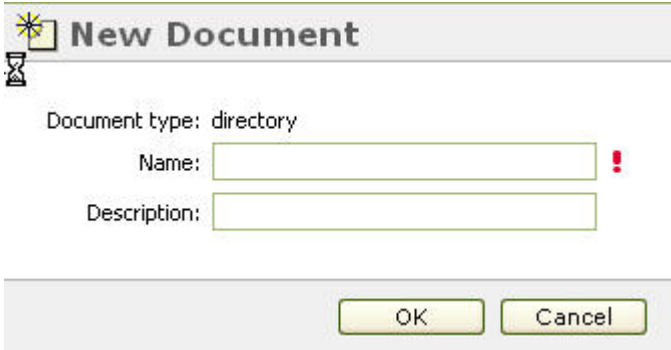
Contribution documents store content in a set of fields that you can edit directly in Collage. Your web designers determine what formatting you can apply to this content.

---

## Faculty and Staff

### Adding New Faculty or Staff

Use the following steps to add new faculty or staff.

Step	Action
1	Navigate to the <b>Content</b> view   <b>Contribution</b> sub-view.
2	Click on the folder name <b>fac_staff</b> .
3	Click on the letter of the last name.
4	Click the <b>New Document</b> button at the top.
5	<p>Type in the file name.</p>  <p><b>Note:</b> The standard is last name, underscore and first. Ex. doe_jane</p>
6	Click <b>OK</b> .
7	<p>Fill out the following required form fields:</p> <p>First name, middle, last name, display name and phone.</p> <p><b>Note:</b> The remaining fields are optional.</p> <p>Degrees, bio, fax, email, office, office hours, other information and image.</p>

*Continued on next page*

## Faculty and Staff, Continued

---

### Adding New Faculty or Staff (continued)

Step	Action
8	Click the <b>Save</b> button.
9	Click the <b>Metadata</b> button.
10	Select the following required fields: Section (arts_sciences_main), type (faculty or staff), title, primary_department, department (multi select option), chair, (multi select option), active (yes or no).
11	Click <b>OK</b> .
12	Click the <b>Save</b> button.
13	Click the <b>Preview</b> tab.
14	Click the <b>Exit</b> Button.

---

## Department News

---

**Adding a News Story** Use the following steps to add a news story.

Step	Action
1	Navigate to the <b>Content</b> view   <b>Contribution</b> sub-view.
2	Click on the folder name <b>news</b> .
3	Click on the department folder name.
4	Click the <b>New Document</b> button at the top.
5	Type in the file name. <b>Note:</b> Use underscore instead of spaces and no special characters.
6	Click <b>OK</b> .
7	Fill out the following form fields: Headline, teaser text and story content.
8	Click the <b>Save</b> button.
9	Click the <b>Metadata</b> button.
10	Select <b>news_events_start</b> date. <b>Note:</b> This is the date you would like to new story to appear.
11	Select <b>news_events_end</b> date. <b>Note:</b> This is the date the news story will expire.
12	Select the department(s).
13	Click <b>OK</b> .
14	Click the <b>Save</b> button.
15	Click the <b>Preview</b> tab.
16	Click the <b>Exit</b> Button.

---

## Department Event

---

### Adding an Event

Use the following steps to add an event.

Step	Action
1	Navigate to the <b>Content</b> view   <b>Contribution</b> sub-view.
2	Click on the folder name <b>events</b> .
3	Click on the department folder name.
4	Click the <b>New Document</b> button at the top.
5	Type in the file name. <b>Note:</b> Use underscore instead of spaces and no special characters.
6	Click <b>OK</b> .
7	Fill out the following form fields: Headline, teaser text, date/location and event content.
8	Click the <b>Save</b> button.
9	Click the <b>Metadata</b> button.
10	Select <b>news_events_start</b> date. <b>Note:</b> This is the date you would like the event to appear.
11	Select <b>news_events_end</b> date. <b>Note:</b> This is the date the event will expire.
12	Select the department(s).
13	Click <b>OK</b> .
14	Click the <b>Save</b> button.
15	Click the <b>Preview</b> tab.
16	Click the <b>Exit</b> Button.

---

## Finding Assets

### Using the Search Feature

Searching provides an additional method to locate assets. The search feature has a great deal of flexibility and you can be very specific with your search criteria. Searches can be saved as queries in a **query cabinet** to use later.

The search function is accessed from the **Content** view via the **Search** sub-view. Once you click on **Search**, the search criteria menu displays:

The screenshot shows a search interface with a 'Search' dropdown menu. Below it, there is a 'Name' field with a dropdown menu set to 'contains'. Underneath are several checkboxes for search criteria: Type, Size, Date, User, Asset, Approval, Search In, and Dependencies. At the bottom, there is a 'Search' button and a link that says 'Save search as query cabinet'.

For any selected check box, additional criteria can be entered. For instance, in the example below on the left, if you select **Type**, you can also select which type of file from a long list of asset types in the drop-down menu. In the example on the right, if **Asset** is selected, a number of options can also be selected. Any of the selections can be used individually or in combination.

This screenshot shows the search criteria menu with the 'Type' checkbox checked. A dropdown menu is open, displaying a list of asset types: Text (all types), Image (all types), Contribution Documents (all types), Contribution Folders (all types), and Deploy Folders (all types). There is also a '---' option at the bottom of the list.

This screenshot shows the search criteria menu with the 'Asset' checkbox checked. A dropdown menu is open, displaying a list of asset options: is, referenced, a master-page set to be deployed, a shadow asset, Force Deploy, graduate, undergraduate, and Visible in tree.

*Continued on next page*

## Finding Assets, Continued

---

### Creating a Custom Search Class Exercise

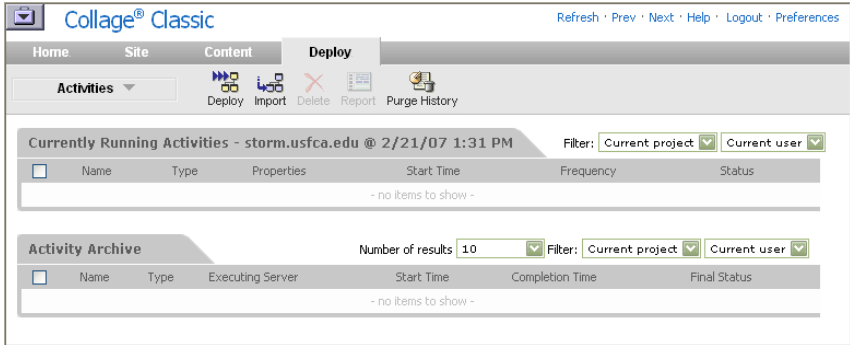

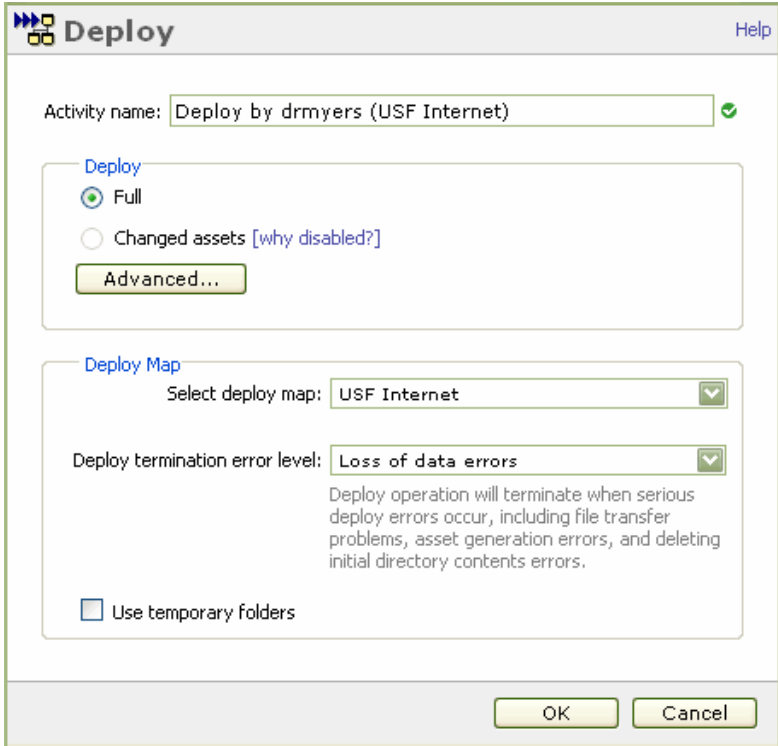
Use the following steps:

Step	Action
1	Create a custom search query to view all of your checked out items for your project in the <b>Content</b> view   <b>Search</b> sub-view
2	Check the <b>User</b> option and current user
3	Select <b>checked out by</b> .
4	Use the dropdown and select <b>current user</b> .
5	Click the <b>Search</b> button. Collage will search to see if the user has any assets checked out.  <b>Note:</b> Searches can be saved as queries in a <b>query cabinet</b> to use later.
6	Check all the files and click the <b>Check In</b> button and click <b>OK</b> .

---

# Deploy Content (Optional)

**Deploy Content Class Exercise** Use the following steps to deploy content to the USF web site:

Step	Action
1	<p>Navigate to the <b>Deploy</b> view   <b>Activities</b> sub-view.</p> 
2	<p>Click on the <b>Deploy</b>  button to open the Deploy window.</p> 

*Continued on next page*

## Deploy Content, Continued

---

### Deploy Content Class Exercise (continued)

Step	Action
3	<p>Here you have four options for deploying content:</p> <ul style="list-style-type: none"> <li>• <b>Full Deploy</b> All approved content for the entire site.</li> <li>• <b>Changed Assets Deploy</b> Only changed assets that have been approved.</li> <li>• <b>Folder Deploy</b> The specified folder and all of its contents.</li> <li>• <b>Asset Deploy</b> The assets that have been selected.</li> </ul> <p>Click on the <b>Advanced...</b> button to view the <b>Folder</b> and <b>Asset</b> options.</p> <p><b>Note:</b> A <b>Full</b> deploy must be completed first before a user can perform a <b>Changed Asset</b> deploy. If a lot of changes have been made to the site, Collage may require that a <b>Full</b> deploy be initiated again.</p>
4	Click to browse for <b>Select asset</b> .
5	Expand the folders and click on the folder name to view the contents.
6	<p>Select the file(s).</p> <p><b>Note:</b> You can also remove a file once it has been added.</p>
7	Click <b>Ok</b> .

*Continued on next page*

## Deploy Content, Continued

---

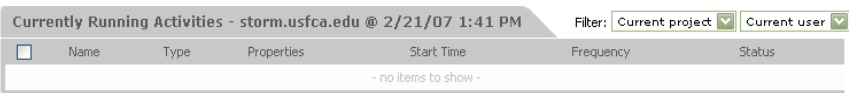
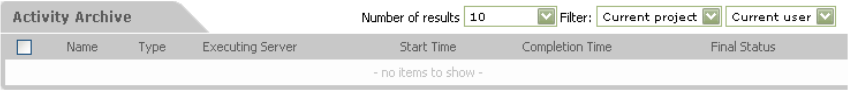
### Deploy Content Class Exercise (continued)

Step	Action
8	<p>Next, click on the dropdown for <b>Number of levels of references to deploy</b>.</p> <p><b>Note:</b> You have three options for deploy:</p> <ul style="list-style-type: none"> <li>• <b>Selected files, no references</b> Only files that were select will be deployed.</li> <li>• <b>Selected files and direct references from those files</b> Files that contain images or PDF files will also be included in the deploy.</li> <li>• <b>Selected files and all references from those files</b> Any file that is linked from or to will be include in the deploy.</li> </ul>
9	Choose <b>Selected files and direct references from those files</b> .
10	<p>The Select deploy map is <b>USF Internet</b>.</p> <p><b>Note:</b> Some projects may have multiple options. Always confirm that you are using the correct deploy map.</p>
11	<p>Next, click on the dropdown for <b>Deploy termination error level</b>.</p> <p><b>Note:</b> You have three options:</p> <ul style="list-style-type: none"> <li>• <b>Any deploy errors</b> Collage will stop the deploy if any errors occur.</li> <li>• <b>Loss of data errors</b> Collage will stop the deploy if data errors occur.</li> <li>• <b>Only fatal errors</b> Collage will stop the deploy if only fatal errors occur.</li> </ul>

*Continued on next page*

## Deploy Content, Continued

### Deploy Content Class Exercise (continued)

Step	Action
12	Choose <b>Only fatal errors</b> .
13	Click <b>Ok</b> to start the deploy.
14	<p>The deploy process will be added to <b>Currently Running Activities</b>.</p>  <p><b>Note:</b> You will need to use the <b>Refresh</b> button on the top program bar to update the status of the deploy.</p>
15	<p>Once the deploy finished, the results will move to Activity Archive.</p>  <p><b>Note:</b> If errors occur there will be an <b>Errors Reported</b> link, view the details and try to resolve the error.</p> <p><a href="#">Activity completed -- Errors Reported</a></p>

## Course Wrap-up

### Course Wrap-up

- Final notes or additional questions?
- 

### Contact Us

For Collage specific questions, please contact Web Services at [webservices@usfca.edu](mailto:webservices@usfca.edu).

Use the following link to view online troubleshooting and tutorials for Collage:

<http://www.usfca.edu/collage>

Thank you for attending the Collage Contributors – Introduction Course!

---