User Help

Publishing with Fabasoft Xpublisher

Contents

1 Introduction

Publishing extends Digital Asset Management (DAM) by enabling users to collaboratively plan, create, edit, and finally publish products from the content and media files managed as assets through a set of integrated services. With Xeditor, a professional online XML editor is integrated, which enables authors to intuitively create and edit structured content in XML format.

2 Preparation

This chapter supports you in getting started. You will get an overview of the basic setup and operation of the system.

2.1 Link between Digital Asset Management and Publishing

The Publishing solution can only be used effectively in combination with Digital Asset Management, which must also be licensed for your organization. This is because content that composes your publications is created, edited and managed media-neutrally within the DAM as assets. The connection is made once these assets are assigned to specific projects or products for (re)use, which in turn represent the core elements of Publishing. Conversely, content generated in a project/product context can be registered back into the DAM for media-neutral management.

Note:

- For a description of the procedure of the initial registration of the system, see the DAM User Help chapter "Initial Registration".
- To authorize your users for the Publishing solution, proceed in the same way as for the DAM. You can use the same teams or create separate teams (e.g. "Publishing Administrators").
- Xeditor is integrated in both the DAM and Publishing solutions. For more information on creating and editing Xeditor documents, see the DAM User Help chapter "Xeditor".
- Overall, we recommend users of both solutions to start with the document "User Help Digital Asset Management with Fabasoft Xpublisher DAM".

2.2 Basic Operation

The following chapters provide initial assistance for operating the web client.

2.2.1 Structure of the Web Client

This chapter will familiarize you with the structure of the web client and how to navigate the system.

Home

After successful logging in, the user will see his or her personal "Home" dashboard.
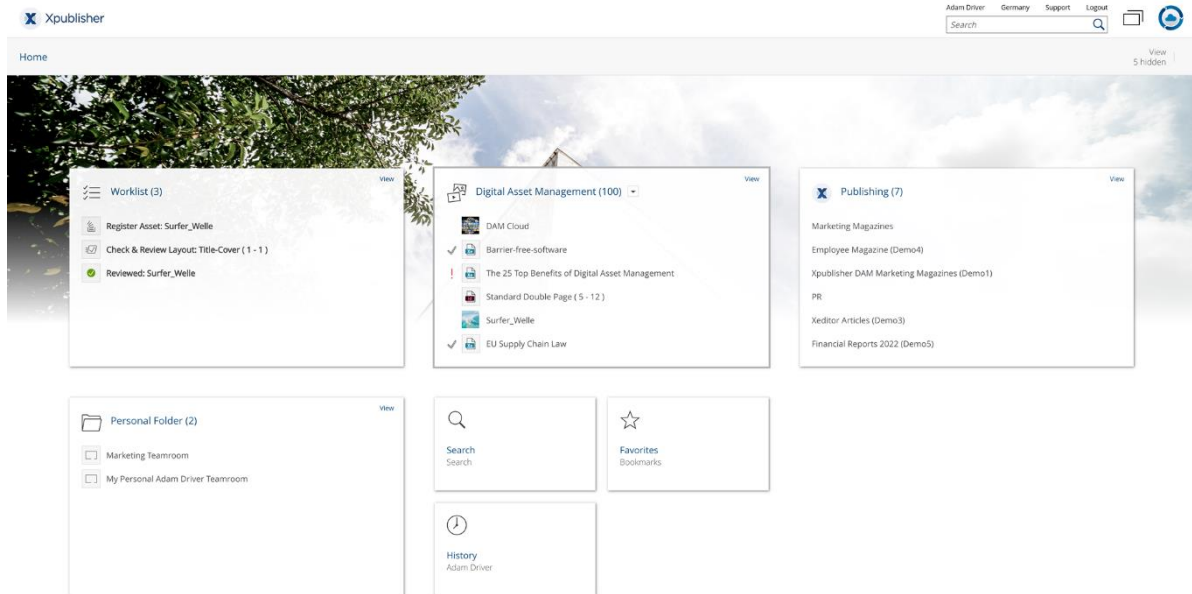
Depending on which solutions you have been licensed for and your personal settings, various widgets (e.g. "Worklist", "Publishing") are displayed. The dashboard concept of the home area offers you possibilities for individualization. For example, you can display or hide the widgets, and adjust their size and order.

Publishing Dashboard

By clicking on the "Publishing" widget, you will reach your personal Publishing dashboard, which will be used to explain the general structure of the web client below.
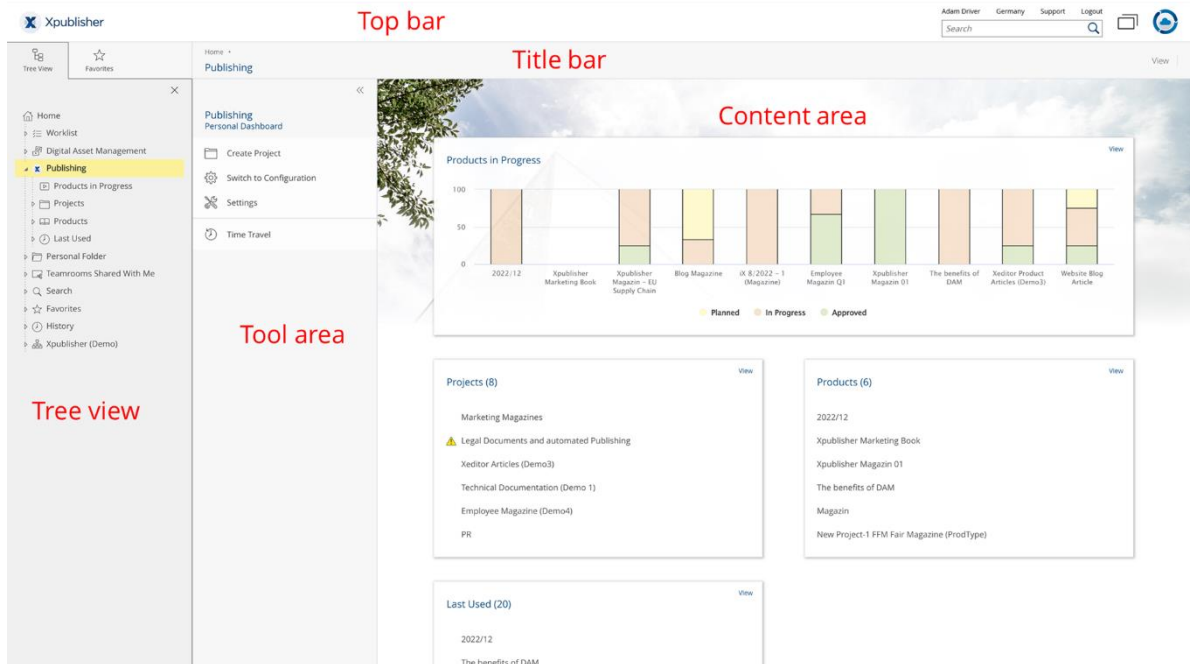
The web client is divided into the following areas:

- **Top bar**
  In the top bar you will find your organization logo on the left (if set up) and on the right the

user's account menu, the data location menu, the support button, the logout button, the quick access button, the home button and the search bar.
Note:

- The top and title bar are always displayed - regardless of where you navigate within the system. This gives you access to the actions there (e.g. support, search) at any time.

- You can find more information about the powerful full-text search with Mindbreeze in the Fabasoft Cloud user help in the chapter "Search With Mindbreeze".

- **Title bar**
The title bar contains the breadcrumbs of the currently opened hierarchy. If you navigate in a widget within a solution, the other widgets of the same level are displayed as tabs.

- **Content area**
The content area generally displays the content of the current object. This can be, for example, the widgets of the home or DAM dashboard, the subfolders and files of a folder, or the preview of a document.

- **Tool area**
The tool area is basically available everywhere in the system except on the "Home" screen. In the tool area you will find context-dependent "actions". Common actions in the tool area are, "Team", "Settings", or "Time Travel".

- **Tree view or Favorites**
Furthermore, you can display or hide the "Tree View" or "Favorites" area anywhere in the system, except on the "Home" screen. The tree view allows you to quickly orient yourself and navigate within the system. You can add frequently used objects (e.g. folders or documents) to your favorites. To do so, navigate to the desired object. In the Favorites area, you will then be offered an action to add it. Alternatively, you can right-click on the object and select the action "Add to Favorites" within "Extras".

Note: Up to three column areas can be displayed side by side (e.g. "Tree View", "Actions" and "Team").

2.2.2 Execute Actions

The following basic options are available:

- Left-click the desired button to execute the corresponding action.

- The Actions tool always contains the most important actions in the current context. The actions refer to the object displayed in the content area. For example, if you are in an Xeditor document, you can open the Xeditor document for editing using the "Edit" action in Xeditor.

- You can open the context menu of an element by clicking the right mouse button. Usually, in addition to the actions that are also offered in the tool area, you will find other less frequently used actions in the context menu.

  - Context menu of objects
    Execute a right-click on an object in the content area. The context menu of this object will be opened.

  - Title bar context menu
    Execute a right-click on the title bar. The context menu of the object currently displayed in the content area opens.

  - Background context menu
    When you are in a Teamroom or folder, right-click in an empty area within the content area.

The context menu contains actions relevant to working with lists (for example, create a new item in the list).

- To select entries in a list, click the checkbox of the corresponding entries. For example, you can execute a context menu command on several objects.

2.2.3 Fabasoft Cloud Client

To work efficiently, the installation of the native Fabasoft Cloud Client is highly recommended. The Fabasoft Cloud Client is available for Microsoft Windows, Apple macOS and Ubuntu.

You can start the installation via the web browser status (Account menu (your user name) > "Status" > "Web browser status"). If your organizational policies do not allow installation on your end device, please contact your IT support.

Further information can be found in the white paper "Fabasoft Cloud Client".

2.3 Organizational Management

Initially, there is one member (the organization owner) in a cloud organization. This member is automatically authorized to manage the organization, for which purpose a widget "Cloud organization" is placed on "Home".

2.3.1 Create Users

To create a user, proceed as follows:

1. Navigate to your organization via "Home" and then to the "Membership" section.
2. Click on the "Add Members" action.
3. In the *User (Email Address)* field, enter the user's email address.
4. Click "Invite new user" in the drop-down menu.
5. Enter the *first name* and *last name and* click "Create".
6. To add multiple members at once, repeat steps 3 through 5.
7. Click the "Add" button.
8. Assign the full access edition to the users and click "Assign".
9. Click "Invite" to send a membership confirmation email per member.

The added members can register for the first time via the invitation emails sent.

Note: Via the "Import Members" action you can also create members collectively via CSV file import. In the corresponding action dialog, you have the possibility to download a CSV template.

2.3.2 Create Teams

In addition to the automatically created teams "Fabasoft Cloud Enterprise (Full Access)", "Fabasoft Cloud Enterprise (Read access + Comments)" and "Fabasoft Cloud Enterprise (Access for External Members)", it is recommended to also create the following three teams:

- *Publishing Administrators*
  Members of this team should be able to edit the DAM configuration (generally: editorial department management). They should also be given all rights at the shelf-level.

- *Publishing Users*
  Members of this team should be able to use the DAM (generally: members of the editorial department).
- *Publishing Users (External)*
  Members of this team should have access to external areas where they have been authorized (generally: suppliers, customers and external employees).

The purpose of creating these teams is to simplify the initial setup, administration, and use of the Publishing solution through role-based management of access rights. To create the teams, follow these steps:

1. Navigate to your organization via "Home" and then to the "Teams" section via the "Membership" section.
2. Click on the "Create Team" action.
3. In the *Name* field, enter the value "Publishing Administrators" and click Create.
4. Navigate to the team you just created and click "Add Team Members".
5. In the *Users* field, select the desired members.
   Note: In a pilot phase, add only the designated users. You can display a list of all available members by entering an asterisk (*) and then pressing the Enter key, and select the desired members by clicking on them.
6. Click on "Add".

Repeat the process to additionally create the "Publishing Users" team and the "Publishing Users (External)" team.

2.3.3 Authorize Teams

To authorize the teams in the Publishing configuration, do the following:

1. Navigate via "Home" to your organization, then to the "Licenses"/"License administration" area and then to the "App Configurations" area.
2. Select the "Publishing Configuration".
3. Click on the "Team" action.
4. Click the plus icon next to the App Administrator role to open the search box.
5. Type "Publishing Administrators" and press Enter to search for the team you created earlier.
6. Choose the Publishing Administrators team in the drop-down menu.
7. Repeat the process and add the "Publishing Users" team to the "App User" role.
8. **Optional**: Remove the automatically added organization owner (context menu command "Remove") to ensure a consistent role-based authorization.

For the authorized members, the "Publishing" and "Synchronized shelf" widget is placed on Home. If roles are assigned while users are logged in, users must reload the page (F5 key) for the dashboard to be placed.

At the end of a pilot phase, you can create additional Publishing user teams, if necessary, to authorize different users in projects, products and external areas.

Note:

- The purpose of the synchronized shelf is to allow users when editing InDesign files locally, to also edit images locally. You can remove the widget when you don't need it and restore it in your personal DAM dashboard at any time ("Restore Personal Shelf").
- If you have accidentally authorized the wrong team or user, click "Remove" in the context menu of the team member.
- Organizational management applies across solutions. This means that you can retrieve users and teams already created in the DAM context and authorize them for the Publishing solution as well. In particular, if the same users are to administer the DAM and Publishing, for example, it is sufficient to create only one administrator team and authorize it for the DAM and Publishing configuration.
- Beyond the initial setup of the system, you will find general information on organization management in the "Administration Help Fabasoft Cloud".

2.4 Your start with Publishing

After the initial access-rights have been assigned by the organization owner (see chapter 2.3.3 "Authorize Teams"), the defined Publishing administrators can start with the initial setup (see also chapter 7 "Administration Help: Publishing Configuration"). If you are a regular Publishing user, continue with the following chapter.

3 Structuring Elements of Publishing

The main structuring elements of Publishing are:

- *Publishing Dashboard*
  The dashboard is the central access point to the Publishing solution for Publishing users. When a user is added to the Publishing configuration as an app user, a dashboard is automatically created and placed on Home as a widget.
- *Publishing Configuration*
  In the Publishing configuration, general settings are defined that apply to all projects and define the basic structure of projects and products. You must be an app administrator to edit the Publishing configuration. You can access the Publishing configuration by navigating to the Publishing dashboard on Home, and then clicking the "Switch to Configuration" action.
- *Projects*
  Projects are based on the Publishing configuration, are specified by project types and are used to manage the different products contained within a project. In addition, different access rights can be set for different projects.
- *Products*
  Products are the core element in Publishing and are used for collaborative planning, creation, and generation of publications. They describe the structure of content and consist hierarchically of individual components, layout templates, and assigned assets/content.
- *Components*
  Components further structure products into individual subsections. They allow you to define the minimum and maximum number of pages or content they can hold. Components can thus subdivide classic print products, but also structure digital outputs.
- *External Areas*
  To collaborate with external users, who should not have access to an entire project or product, external areas can be created.

- *Publications*
  Products can be published via integrated services. This creates a PDF, EPUB, HTML, JSON or comparable artifact that can be sent to its final destination via its own processes.

4 Publishing Dashboard

The Publishing Dashboard is your access point to the Publishing solution.
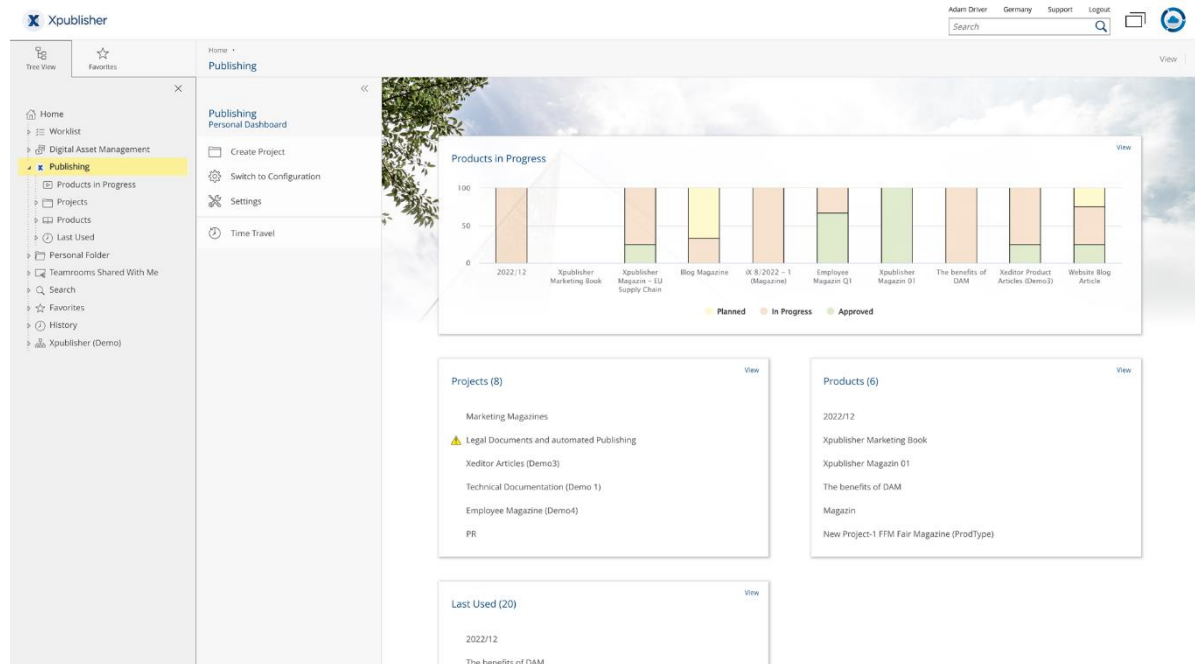
When you are added as an app user to a Publishing configuration, a dashboard is automatically created and placed as a widget ("Publishing") on "Home". When you are removed as an app user, the dashboard/widget will also get removed.

Areas

The Publishing dashboard is divided into the following sections:

- *Products in Progress - Chart*
  Displays the 10 most recent products.
- *Projects*
  Displays projects you have access to.
- *Products*
  Displays products you have access to.
- *Recently Used*
  Displays projects and products in a list that you have recently used.

Actions

You can execute the following actions:

- *Create Project*
  You can create a new project based on a pre-defined project type.

- *Switch to Configuration*
  As an app administrator, you can switch to the Publishing configuration.
- *Settings*
  You can set general properties of the Publishing Dashboard (for example, the logo or the notification setting).

4.1 Displaying list entries flat

The lists of projects and products displayed on the dashboard are designed for a maximum number of approx. 10,000 entries to ensure high-performance sorting and grouping of the entries.

For large amounts of data, the option is available to display the list entries in a search-based flat list. This displays a list with a maximum of 10,000 entries. You can use a search dialog to search for entries in the total quantity of projects or products and display the result in the list.

To display the contents of the projects and products in a flat list, proceed as follows:

1. On the Publishing Dashboard, click on the "Switch to configuration" entry in the action bar.
2. Right-click on the "Xpublisher Configuration" entry in the title bar
3. In the context menu under "Tools", select the entry "Display Entries in Flat List".
4. Confirm the following dialog by clicking on "Switch".
5. The list is now displayed as a search-based list once the action has been completed.

Note: The behavior can be undone via the "Structure list entries in folder" action in the same place in the context menu.

4.1.1 Execute, save, load and reset searches

As soon as you have changed the mode of the lists, new entries are available in the action bar.

- *Search*
  Opens the search dialog and allows you to search through the entire set of projects or products.
- *Refresh*
  Refreshes the results of the currently displayed search.
- *Further search functions*
  - *Reset search*
    Resets the search and displays the first 10,000 hits.
  - *Save search form*
    Saves the current search pattern and allows it to be loaded again.
  - *Load search form*
    Allows a saved search pattern to be loaded and executes the search.

5 Projects

A project consists of one or more products. This allows you to build a hierarchical structure according to your internal company project and product structure. For example, book series could be organized as a project, the books contained therein as subprojects, and in turn the issues or different output formats (ePub, paperback, …) as products.

Note: Since projects are based on the concept of Fabasoft Cloud Teamrooms, you can manage access permissions granularly on a user, role, or team basis similar to Teamrooms. More detailed information on teamrooms can be found in the general Fabasoft Cloud user help to the chapter "Collaboration with Teamrooms".

5.1 Create Projects

To create a project, proceed as follows:

1. Navigate to your Publishing dashboard.

2. Select the "Create Project" action from the tool area.

3. Set the following metadata:

    o *Name*
       Defines the name of the project.

    o *Project Type*
       Defines the project type of the project. Project types are preconfigured by App Administrators and specify the products that are created in this project by default and can be added.

    o *Tags*
       You can tag your project with the tags preconfigured by administrators.

4. Click on "Next".

Note: To be able to create projects, at least one project type must be available for selection. The creation of project types (see chapter 7.1.7 "Project Types") by administrators is therefore a necessary prerequisite to create projects.

5.2 Project Dashboard

The Project dashboard is the access point for all the products belonging to a project and their content. As an app user, clicking a project on the Publishing dashboard takes you to this project's dashboard.
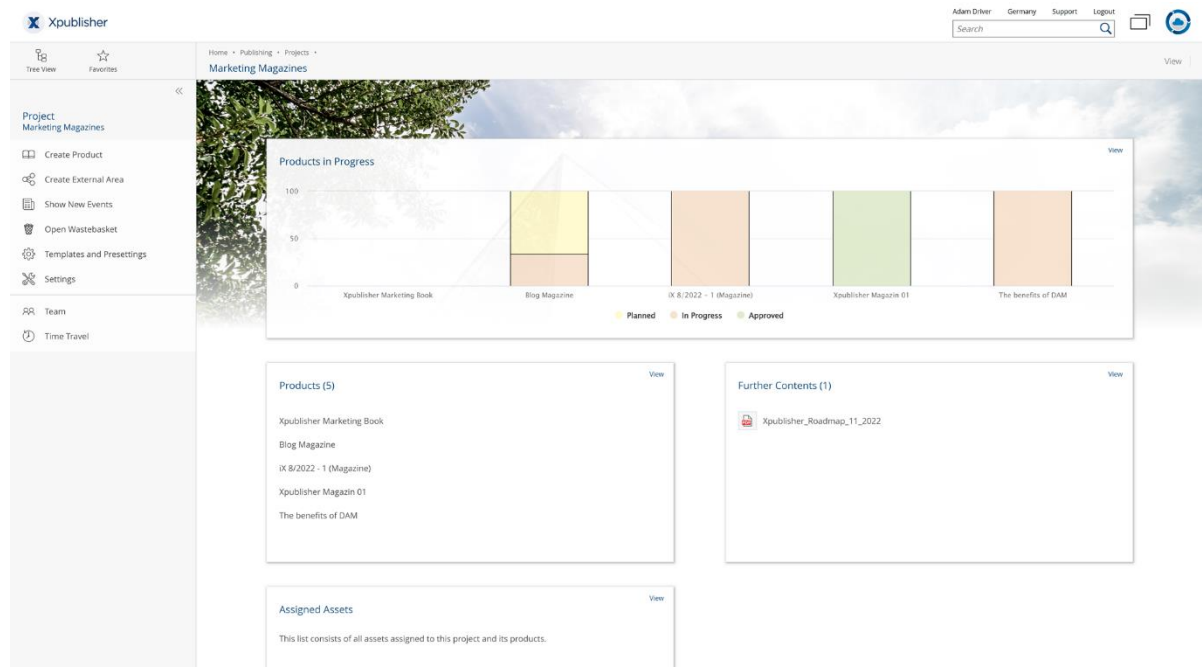
Areas

The project dashboard is divided into the following sections:

- *Products in Progress - Chart*
  Displays the 10 most recent products of this project that are not yet completed.
- *Products*
  Displays the products within the project that you have access to.
- *Further Content*
  Displays accompanying material that has been assigned to the project. These are not relevant to the creation of the product, but can be, for example, manuscripts, agreements, correspondence, contracts, or similar.
- *Assigned Assets*
  Displays content from Digital Asset Management that has been assigned to the project. These can be found and used when users later create products.
- *External Areas*
  Displays the external areas in a list that you have access to.
  Note: This area is displayed only if external areas exist.

Note: More information about "Further Content", "Assigned Assets" and "External Areas", as well as the actions available there, can be found in chapter 6.4 "Other Areas within the Product Context" and can be transferred analogously from the product to the project context.

Actions

You can perform the following actions:

- *Create Product*
  You can create a new product based on a defined product type that is defined for this project in the app configuration.

- *Create External Area*
  You can create a new External Area intended for collaboration with external users who perform services for the project.

- *Show New Events*
  You can view changes and events for the current project.

- *Templates and Presettings*
  An App Administrator or a user who has "Full Control" can define templates and presettings explicitly for the current project.

- *Settings*
  You can set general properties of the project.

- *Team*
  You can manage access administration to the project on a user, role, and team basis. Access settings are inherited from the parent project to the products it contains, but can be adjusted there.

- *Time Travel*
  Time Travel allows you to view, compare, and restore versions of objects in the past. You have the ability to transparently track and undo changes. In the project context, for example, you can track when a project was created, which users were authorized to it, when which products or content were created, and who made these changes.

Note: Which of these actions are displayed to you and the extent of the underlying functionalities and setting options behind them depend on the access rights you have been assigned in the project.

6 Products

A product describes the structure of content and consists of individual components. There are dedicated products for print media, which are assembled using layout templates, texts and images in layout planning, as well as products that are intended for more structured or digital publications.

Note: Since products are also based on the concept of Fabasoft Cloud Teamrooms, you can manage access permissions granularly on a user, role or team basis, similar to Teamrooms. For more information on Teamrooms, please refer to the general Fabasoft Cloud user help to the chapter "Collaborating with Teamrooms".

6.1 Create Products

When creating a project, products may already have been generated automatically based on the standard products preconfigured in the project type. To create another product manually, proceed as follows:

1. Navigate to the project dashboard of the project in which you want to create the product.

2. Select the "Create product" action in the tool area.

3. Set the following metadata:

   o *Name*
     Defines the name of the product.

o *Product Type*
  Defines the product type that specifies what the product consists of and how it can be published.

o *Publication Date*
  Defines the planned date of the product's publication.

o *Issue*
  You can set the issue number.

o *Tags*
  You can tag your product with the tags preconfigured by administrators.

4. Click on "Next".

Note: To be able to create products, at least one product type must be available for selection. The creation of product types (see chapter 7.1.8 "Introduction Product Types") by administrators is therefore a necessary prerequisite to create products.

6.2 Edit Products

By default, when you navigate to a product from your Project Dashboard, it is displayed in the Planning view. Alternatively, you can switch to this area via the Planning tab. There, you have layout planning for layout-based publications and a structure tree that displays a hierarchical overview of the product.

6.2.1 Working with Layout Planning

Navigate to your product and make sure that you are at root or top product level in the structure tree. In the content area, the product is now displayed in the layout planning view. Grouped by components, the individual pages of your product are displayed with page numbers. If you are working with sections or status, these are displayed as (colored) bars above or below the page preview.

You can edit your product directly in layout planning. The following functions are available in layout planning:

- *Add empty pages*
  Clicking the "Plus" icon will insert a blank page inside the component.

- *Add layout template*
  By double-clicking on an empty page, you can add a predefined layout template to it.

Note: The layout planning view adapts to the selected level of the structure tree. For example, if you last clicked on the product name, the complete product is displayed. If you have selected a product component or area, the view is filtered to its contents. If, on the other hand, you last clicked on a layout template or image, its PDF preview will be displayed.

6.2.2 Working with Structure Planning

The structure tree is a hierarchical representation of your product. By clicking with the left mouse button on an element of the structure tree you can navigate within the product. Depending on the selected element, the layout view or PDF preview in the content area, as well as the actions available in the tool area are adapted to the current context.

The following functionality is available in the structure planning:

- *Team*
  In the product, the access authorizations from the project are automatically inherited initially. The "Team" action can be used to authorize additional users or user groups in the product.

- *Structure*
  You can display the structure tree of the product. Via the close symbol (X) in the column of the structure tree, you can hide it.

- *Time travel*
  You can view the product at specific points in time in the past.

  Note: More detailed information on time travel can be found in the Fabasoft Cloud user help in the "Time Travel" chapter.

- *Settings*
  You can view and edit the metadata of the product.

- *Create External Area*
  You can create an external area at product level.

- *Publish*
  When you have finished planning your product, you can start your publication here. To do this, select a deployment format in the dialog box and confirm with the "Publish" action.

- *Add Predefined Components*
  If the standard components predefined by the product type are not sufficient for you, you can add further components.
  Note: Only the standard components and additional components defined in the product type are available to users for selection.

- *Add Layout Template*
  You can add layout templates to components.

- *Add Area - Rubrics*
  To structure a product further, you can "add areas" in components. In the corresponding dialog you can name them and assign a rubric.
  Note: Rubrics can be used to identify sequences of pages that belong together logically or in terms of content. Rubrics are managed by administrators in the Publishing configuration (see chapter 7.1.6 "Rubrics").

- *Add empty page*
  You can add a blank page.

- *Copy*
  You can copy the selected element.

- *Delete*
  You can delete the selected element.

- *Send link*
  Send a link to the selected items using your local email client.

- *Properties*
  You can view and edit the metadata of the selected element.

- *Edit*
  Structure Tree elements can be "edited" directly in the web browser or in your favorite local desktop application, depending on the object class. For example, you can revise layout templates in your local InDesign desktop application. The installed cloud client automatically

triggers the update of the cloud version with every save operation. XML documents, on the other hand, can be edited directly in the web browser using Xeditor.

Note: For more information on editing Xeditor documents, see the DAM User Help chapter "Edit Xeditor Documents".

- *Read*
  Users can view structure tree elements in the browser or in the local desktop application, depending on the object class, without the ability to modify them (see *Edit*).

- *Download*
  You can "Download" structure tree items for viewing and editing without automatic synchronization via the Cloud Client. The downloaded file is saved in the download folder - predefined in your personal browser settings.

- *Upload*
  You can overwrite objects in the structure plan with files from your local file system using the upload function.

- *Swap with predecessor/successor*
  You can rearrange and reorder elements in the tree structure. "Swap with predecessor" or "Swap with successor" allows you to swap an element with the preceding or following element on the same structure tree level and thus change the order of the components of a product or the layout templates within a component.

- *Expand/collapse all*
  For better orientation, you can collapse or expand the hierarchical tree elements (e.g. completed chapters).

- *Search entry*
  To quickly find an element in the structure tree, you do not have to expand all elements of the tree structure and search manually, but can also use the integrated search function.

- *Add tags*
  You can use tagging functionality for keywording.

- *Add Content*
  You can search Digital Asset Management for Xeditor, Word documents and images and add them to the layout template.

- *Remove Assignment*
  You can also remove added assets.

- *Place content*
  After you add XML content and/or images to the layout template, you can write them to the template using the Place Content action to trigger Adobe InDesign production.

- *Write XML back*
  After editing placed text locally in InDesign, you can write it back to the Xeditor document stored in the DAM. Unlike images, where the write-back of changes to the DAM is automatic, this must be triggered manually for XML.

- *Start new process - status*
  In the submenu of "Extras" you can "Start a new process" for elements of the structure tree. In the corresponding dialog you have the choice between ad-hoc processes and predefined BPMN processes (see chapter 7.1.11 "Processes"). If a status change has been linked to the completion of tasks in the configuration for the selected process, the current status is displayed as a colored bar depending on the process progress for the corresponding layout

template. The default statuses are "In progress" (yellow) and "Approved" (green). More details about statuses can be found in the administration help in chapter 7.1.2 "Status".

- *Close*
In the submenu of "Extras" you can "Close" elements of the structure tree. Afterwards, the object can no longer be edited and a symbol displays the closed-status.

Note:

- The range of functions depends on the element selected in the structure tree and its object class.
- You can find the actions in the tool area of the selected element or in its context menu.
- Components may be marked with a warning symbol in the structure tree. In this case, the maximum or minimum number of pages of the component is exceeded.

6.3 Publications

Products can be published as PDF documents, EPUBs, HTML, JSON and in other formats. A supplied process is available for releasing the publication, which can be replaced by a custom process if necessary.

6.3.1 Publish Products

To create a publication for a product, proceed as follows:

1. Navigate to the desired product.
2. Click the Publications > Publish action.

A new publication is created.

The created publication is stored in the "Publications" dashboard area and in the "Publications" tab of the product's properties. In addition, the publications are accessible via the "Publications" action of the product.

Note:

- The action is only available, if the currently used product type has a provisioning format assigned.

6.4 Other Areas within the Product Context

By default, you jump directly to the Planning area when you navigate to a product. Using the breadcrumbs in the title bar, you can jump to a product dashboard which, in addition to the "Planning" and "Publications" areas already described, also displays the "Further Content", "External Areas" and "Assigned Assets" areas described below as widgets.

6.4.1 Further Content

Content that you want to use exclusively within the current product and do not want to reuse, you do not have to manage in the DAM. You can use the "Further Content" area for this purpose. To add content there, you have the following options:

Add Entry

- *New*
  You can create objects assigned to the product. To do so, select the object class (e.g. Xeditor document or Microsoft Word document) in the corresponding catalog, assign a name and confirm with "Next". You can then "Edit" the object.
  Note: Alternatively, you can find the action "Create Further Content" in the tool area.

- *Upload*
  You can "Upload" files from your local file system and thus assign them to the product.

- *Paste Duplicate*
  You can insert objects (e.g. documents, images, folders) from your clipboard as duplicates and thus assign them to the product. If you edit the inserted object afterwards, the object remains unchanged in the original location, you only change the duplicate. You can add objects to your clipboard within the Web Client by right-clicking and "Copy" or "Cut" and move them within the Web Client using "Paste Duplicate". Alternatively, you can also copy files from your local file system in your clipboard and upload them in the product using "Paste Duplicate".

- *Paste Shortcut*
  You can paste objects from your clipboard with "Paste Shortcut". This creates a shortcut to the object in the original location. Links to objects are visualized by their own icon. When you "Edit" a linked object, you always edit the object in the origin folder.

- *Find*
  You can use the search function to search the web client for objects using search filters and search operators. Mark your desired results and assign them to the product by clicking "Next".

You can use the context menu command "Register as Digital Asset" to transfer your content created in the "Further Content" area to the DAM for media-neutral management. The asset's origin location is then changed to the target asset shelf selected in the dialog.

Note: For more information on creating and editing Xeditor documents, see the DAM User Help chapter "[Xeditor](#)".

6.4.2 External Areas

This tab displays the external areas you have access right to and that have been created at the level of the current product.

Create External Areas

An external area can be created at the level of projects or products. To create an external area, proceed as follows:

1. Navigate to your project or product.

2. Click on the "Create External Area" action.

3. Enter a name.

4. Confirm with "Next".

5. You can now authorize additional external members or teams (e.g. Publishing users (external)) via the "Team" action.

Note:

- This area is only displayed if external areas exist on the product level.

- In the external area, external members can also create Xeditor documents and the registration in the DAM can be triggered. For more information, see the separate document of the DAM user help in the chapters "[Xeditor](#)" and "[(Re)register Assets](#)".

6.4.3 Assigned Assets

The Assigned Assets area provides you with a link to Digital Asset Management. The following actions are available in the tool area:

- *Add Assets*
  This action lets you search your Digital Asset Management for assets that are already registered and assign them to the product.
  Note: Alternatively, you can use the search bar in the content area.
- *Create Asset*
  You can create cloud objects and then register them as assets in the DAM.
- *Upload*
  You can upload files and then register them as assets in DAM.

7 Administration Help: Publishing Configuration

As an app administrator, you can "Switch to Configuration" from your personal Publishing dashboard. In the Publishing configuration, you can define general settings, app users, and structural defaults for projects and products.

Note: In some cases, configuration tasks can be performed not only at the level of the Publishing solution (via the Publishing configuration), but also at a shelf, project or product level, as well as cross-solution-wide at the organizational level. For more information, please refer to the general Fabasoft Cloud user help to chapter "[General Settings in Configurations and Shelves](#)".

7.1 Areas of the Publishing Configuration

The Publishing configuration is divided into the areas described below, which are displayed as widgets in the configuration dashboard. If you navigate to one of the areas by clicking on the widget, the other areas are displayed as tabs in the title bar.

7.1.1 Projects

This area displays the available projects and corresponds to the "Projects" area as it can be reached by users via their Publishing dashboard. In addition to the functionalities described in chapter 5 "Projects", administrators here can manage not only individual but also all projects with additional settings. These are described in detail in chapter 7.2 "Settings of the Publishing Configuration".

7.1.2 Status

Pages (sequences) in layout planning can be marked with (processing) status. Status cannot be set manually by users, but are always linked to the completion of concrete tasks of predefined standard processes. Only administrators have the possibility to create status and define when they are set automatically.

Create Status

In addition to the "In Progress" and "Approved" status delivered in the standard system, you can create other statuses. Proceed as follows:

1. Navigate to the Publishing configuration.

2. Jump there to the "Status" area.

3. Select the "Create Status" action in the tool area.

4. Assign a (multilingual) name, choose a status icon and optionally a background color.

5. Confirm with "Next".

Note: Repeat these steps if you want to create multiple statuses.

Automated Status Setting

In order for your generated status to be set automatically, you must link it to the completion of a task. To do this, proceed as follows:

1. Navigate to the Publishing configuration.

2. Jump there to the "Status" area.

3. Click the "Properties" command in the context menu of the status.

4. Copy or make a note of the "Fabasoft Cloud ID" of the status. You will find this ID in the "General" tab.
   Note: The Fabasoft Cloud ID always starts with "COO....".

5. Close the properties of the status and navigate to the "Processes" area within the Publishing configuration.

6. Select and open an existing process or create a new BPMN process diagram.

7. Select the task to whose completion you want to link the status change by double-clicking on it.

8. Navigate to the *"Extended"* tab of the task.

   Enter the following formula in the *"Expression when Completing the Activity"* field, including the "Fabasoft Cloud ID" noted in step 4:
   ```
   cooobj.FSCFOLIO@1.1001:bostate = COO....
   ```

9. Confirm with "Apply" and "Next".

10. Release the process for usage by selecting the "Release for Usage" or "Re-release" action in the process tool area.

Note:

- Status functionality is available in the same way as you mark up your assets as part of the DAM solution.

- More detailed information on process modeling using the BPMN 2.0 standard can be found in the Fabasoft Cloud User Help in the chapter "Business Processes with BPMN 2.0".

7.1.3 Layout Templates

Layout templates provided for assignment in layout planning are managed in this area.

Create Layout Template

To create a layout template, proceed as follows:

1. In Publishing Configuration, navigate to the "Layout Templates" area.

2. Click the "Create Layout Template" action.

3. In the following dialog, select the Adobe InDesign version for which you want to create a style sheet.

4. Assign a name for the layout template and select the production service.

5. In the following, upload the template itself (.indd or .css file), a mapping file, and a preview file to display in layout planning.

6. As soon as a layout with the type "Table of contents" is selected, a further configuration appears for the selection of a schema file, a customized mapping to be used for placement, and an XSLT transformation that can be used to further customize the table of contents.

7. Confirm with "Next".

(Withdraw) Release Layout Templates for Usage

To allow the app administrator to develop and test a new layout template step by step without affecting ongoing productions, they are subject to an approval process.

Users can only see the released state of layout templates and only work with them in layout planning. Administrators can see and assign the released state and draft of a layout template. To release or withdraw the release of a layout template, proceed as follows:

1. Open an existing layout template.

2. Click on the "Release for Usage" or "Re-release" action.

3. To withdraw the Release, click on the "Withdraw Release" action.

Note:

- The current release status is additionally indicated by a symbol in the list of layout templates.
- For an operable InDesign production, the layout templates and Xeditor documents must be compatible with each other. This requires, for example, object formats from InDesign to be assigned to the XML elements via the mapping file.

7.1.4 Production Services

The list of Production Services shows all Production Services, that have been configured for the use in the cloud organization.

Create Production Service

To create a Production Service, proceed as follows:

1. Navigate into the list of Production Services from the Publishing configuration

2. Click on "Create Production Service"

3. Choose the type of Production Service you want to create from the dialog

4. Define the name for the Production Service

5. If there is the need to provide a global configuration (like a customer specific license) to use the service, you can add it in the following dialog

6. Confirm with "Next"

Note: Detailed information on the Production Services and their individual options and settings can be found in separate documents in the online help.

7.1.5 Deployment Formats

Deployment formats allow the creation of concrete publications from a product. They essentially define how a specific product becomes a usable PDF, EPUB, HTML, etc. via a defined service.

Create Deployment Formats

To create a deployment format, follow these steps:

1. In the Publishing configuration, navigate to the "Deployment Formats" area.
2. Choose "Create Deployment Format" action in the tool area.
3. In the following dialog, select what kind of deployment format you would like to create
4. Assign a name for the deployment format.
5. Define or Upload the configuration (for example `.joboptions` for InDesign or `.css` file for PrintCSS).
6. Confirm with "Next".

Release and Revoke Releases of Deployment Formats

To allow the App Administrator to gradually develop and test a new deployment format without affecting ongoing productions, they are subject to an approval process.

Users can only see the released state of deployment formats and can only work with them in layout planning. Administrators can see and assign the released state and draft of a deployment format. To release or withdraw the release of a deployment format, proceed as follows:

1. Open an existing deployment format.
2. Click on the "Release for Usage" or "Re-release" action.
3. To withdraw the released state, click "Withdraw Release".

Note: The current release state is additionally indicated by an icon in the list of deployment formats.

7.1.6 Rubrics

This area is used to manage rubrics. Rubrics are used to structure products. Rubrics can be used to identify sequences of pages that belong together logically or in terms of content (e.g. "politics", "sports", or "science" for journals). To create a new rubric, proceed as follows:

1. In the Publishing configuration, navigate to the "Rubrics" area.
2. Click "Create Rubric".
3. In the following dialog you can assign a name and a color code in HEX format for the rubric.
4. Confirm with "Next".

7.1.7 Project Types

Project types are managed in this area. Project types allow administrators to define structural requirements for projects. When creating a project, users must select a project type from the corresponding drop-down list. Thus, providing at least one project type is a necessary prerequisite for creating projects. The selection of the project type determines which standard products are directly included when the project is created. Furthermore, users can be provided with a list of optional products that can be created in addition to the standard products.

To create a project type, proceed as follows:

1. Navigate to the "Project Types" area in the Publishing configuration.
2. Click on the "Add entry" and then on "New". Alternatively click "Create New Project Type" within tool area.
3. In the following dialog you can specify a name, define the lists of standard *Product Types*" and "*Additional Product Types*".
4. Confirm with "Next".

7.1.8 Product Types

Product types are managed in this area. Product types allow administrators to define structural specifications for products. When creating a product, users must select a product type from the corresponding drop-down list. Thus, providing at least one product type is a necessary prerequisite for creating products. The selection of the product type determines which standard components are directly included when generating the product. In addition, users can be provided with a list of optional components that can be created in addition to the standard components.

To create a product type, proceed as follows:

1. Navigate to the "Product Types" area in the Publishing configuration.
2. Click on the "Add entry" and then on "New" or click the "Create New Product Type" action in the tool area.
3. In the following dialog you can specify a name and define the lists of "*Default Components*", "*Additional Components*" and "*Deployment Formats*". If you want to create an enclosing XML structure programmatically when publishing your products, select the option "Use XML union" and define an XML structure.
   Note: This is useful if the product tree consists of a structure of several top-level Xeditor documents that are to be combined into one product at the end.
4. Confirm with "Next".

7.1.9 Components

Components are managed in this area. Products contain one or more components. These in turn contain layout templates. Components thus further structure products into individual subsections. They allow the definition of the minimum and maximum number of pages or content they can hold. By entering a start page, you can also control the number with which the page numbering starts in this area. The "Starts with right page" checkbox controls the display of the first pages in the page plan.

Components can thus subdivide classic print products.

To create a component, proceed as follows:

1. Navigate to the "Components" area in the Publishing Configuration.
2. Click on the "Add entry" and then on "New" or click the "Create Component" action in tool area.
3. Select an object class by choosing between "Print Component" and "Structured Component".
4. In the following dialog you can specify a name and, if necessary, minimum and maximum number of pages or assets.
5. Confirm with "Next".

7.1.10 Forms and Categories

This area displays the forms and categories provided via configuration. User-defined forms can be used to add fields to objects for storing application-specific data. Categories can be assigned to objects and thus influence the behavior of the objects.

Note: More information can be found in the chapters "Forms" and "Categories" of the general Fabasoft Cloud user help, and the white paper "Model-Based Customizing".

7.1.11 Processes

This area displays the processes provided by the configuration. Users, organizations, organizational units and external organizations can be involved in the processing of business objects via workflow by starting a process that can be processed in the worklist. Typical processes are approval and release processes.

Note: More information can be found in the general Fabasoft Cloud user help in the chapter "Workflow", and the white paper "Model-Based Customizing".

7.1.12 Templates

This area displays the templates provided via the configuration. Nearly all objects and especially documents can be defined as templates. In this way new objects or documents based on a template can be created.

Note: For more information regarding templates please refer to the chapters "General Settings in Configurations and Shelves" and "Customizing" in the general Fabasoft Cloud user help.

7.1.13 Text Modules

This area displays the text modules provided via configuration that can be inserted in products. You can use text modules to insert predefined standard texts into Microsoft Word documents.

Note: For more information regarding text modules, please refer to the chapters "General Settings in Configurations and Shelves" and "Customizing" in the general Fabasoft Cloud user help.

7.1.14 Tags

In addition to terms, which are managed in the thesauri area, the tagging function is available for keywording. Unlike terms, tags are managed entirely by administrators in the configuration of the solution. Users can only use existing tags for tagging and cannot create their own.

Note:

- For more information on how to create tags and thus provide tagging functionality to your users, please refer to the administration help of your DAM configuration in the chapter "Tags".
- If you have already created tags via the DAM configuration, you can "copy-and-paste" as shortcuts to the Publishing configuration for reuse.

7.1.15 Thesauri

In the Thesauri area, terms are managed, which can be used for keywording. Thesauri are hierarchically nested keywords or term trees.

Note:
- For more information on how to create terms manually or import Thesauri and manage them, please refer to the administration help of your DAM configuration in the chapter "Thesauri".
- If you have already created or imported terms via DAM configuration, you can "copy-and-paste" them as shortcuts to the Publishing configuration for reuse. Also, you can download them from the DAM configuration and import them into the Publishing configuration.

7.1.16 Preferences

This area displays the presettings provided via configuration (view settings, search patterns, time spans). App administrators can create search patterns. In addition, it is possible to store view settings in lists via the menu command "View" > "View Settings" > "Save" in the configuration.

Note: More information can be found in the general Fabasoft Cloud user help in the chapter "Customizing".

7.1.17 Failed Background Tasks

This area displays failed background tasks (only visible if there is at least one failed background task). You can perform the following manual actions: "Set next execution", "Send link" and "Delete".

7.2 Settings of the Publishing Configuration

In addition to the areas of the configuration that can be accessed via widgets or tabs, you can find further settings via the corresponding action in the tool area of your Publishing configuration.

7.2.1 Access Management and Security Settings

The "Team" action in the tool area allows you to manage access rights. Assign one of the following roles to individual users or entire teams or organizational units to authorize them to use the Publishing solution.

Roles

- *App Administrators*
  App administrators can manage the Publishing configuration. This includes, for example, managing access rights, project and product types, layout templates, BPMN processes, and security settings.
- *App Users*
  App users can use the publishing configuration. To gain access to products, app users must also be authorized in the respective project or product.
- *App Users (external)*
  External app users (e.g., customers) are granted access to external areas in which they have been authorized. In addition, they can view publications.

After selecting the "Team" action, you will find further "Security settings" above the roles, which are subdivided into the following tabs.

Security Settings Tab

Here you can define the following default security settings for the organization's Publishing solution or on the project or product level. Define which type of shortcuts may be stored. Manage what

content can be opened/downloaded on end devices. Define who can add team members. Define a main administrator and a support team. Disable or enable trace output.

Watermark Tab

If you enable the use of watermarks here, you can create a watermark and specify the desired settings for the watermark.

Public Links Tab

Here you can allow the use of public links. Using the "*Block Content Downloads*" field, you can prevent the "Download" button from being offered for public links (even for existing ones). Furthermore, you can set default values for access restriction.

7.2.2 Other Settings

Further configurational settings for your projects and products, you can set via the action "Settings" in your tool area.

"General Settings" tab

- *Name*
  The name of the configuration.

- *Subject*
  The description of the configuration.

- *Holiday Table*
  Defines the holiday table to be used in the configuration context (otherwise the default holiday table is used).

- *Restrict Shortcuts Within Teamroom*
  Defines which type of shortcuts may be stored in the configuration. You can restrict the permitted shortcuts to objects that are assigned to the organization or to objects that are assigned to the configuration.

- *Restrict the Downloading or Opening of Content on the Device.*
  Allows to restrict team members who can open or download content at the device.

- *Roles That Are Allowed to Open or Download Content on the Device.*
  Defines which permissions a team member must have in order to open or download content on the device.

- *All Team Members May Add Members*
  Specifies whether all team members can add users to the team or only team members with "Full Control". Members with change access may grant or revoke change access or read access to other members. Members with read access may grant or revoke read access to other members.

- *Restrict Team Members*
  Defines the organizations, organizational units, teams and external organizations whose members may be added to the configuration. If the list does not contain any entries, members can be added without restriction.

- *Main Administrator*
  Specifies the user who will receive the automatically generated e-mail messages concerning the configuration. Otherwise, all app administrators receive the e-mail messages. The user is also listed as a contact in case of missing permissions.

- *Support Team*
  The support team handles the organization-internal management of support requests in the respective context.

- *Activate Advanced Mode*
  Advanced mode includes, for example, working with multiple trays, as well as managing templates and presettings.

- *Activate Trace Outputs*
  For example, as a form designer, when you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace output to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

"Logos" tab

- *Logo*
  When the logo is defined for a Teamroom, it is used in the Teamroom's title bar and in the card view. When the logo is defined for an organization, it is used in the organization's title bar and card view. It is also displayed in the header bar, if no logo has been defined for the header bar.

- *Logo for Thumbnail*
  The logo is displayed in list views.

- *Here you can select a default logo*
  At the Publishing configuration level, you can set the default logo for thumbnail here, overriding "Logo for preview".

- *Use Background Image of the Organization*
  If a background image has been set in the context of organizational management, you can define here that this image is also used in the Publishing solution as a background for all personal dashboards (e.g. Publishing, Publishing Configuration, Projects).

- *Default Background Image*
  As an alternative to a self-defined background image, a standard background image can be used.

"Default Values" Tab

- *Default Thesaurus for New Terms*
  If a default thesaurus is specified, new terms can be created directly during keywording.

- *Default Categories*
  When an object is created, the specified category is assigned according to the defined object class. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
  Note: The default categories are also applied to projects/products if they have been explicitly defined for projects/products.

- *Default Processes*
  When an object is created, the specified process is assigned according to the defined object class or category. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
  Note: The default processes are also applied to projects/products if they have been explicitly defined for projects/products.

- *Default Background Tasks*
  When an object is created, the specified background tasks are assigned.

- *Release Process for Templates and Presettings*
  In order to use templates, text modules, forms and categories, processes and presettings, they must be released. If a process is to be used for the release, a BPMN process diagram can be defined here. Release processes must contain the "Release for Usage" activity.

"Content Settings" tab

- *Allow Comments*
  Defines whether PDF annotations can be added to documents.

- *Allowed Types for Comments*
  Defines the allowed types of comments (public or private).

- *Preferred Type for Comments*
  Defines the type of comment initially selected when commenting.

- *Users With Read Access Are Allowed to Comment Publicly*
  Defines whether users with read access are allowed to add public comments.

- *Allow Public Links*
  Defines whether public links may be published.

- *Generate Cover sheet for PDF Overviews of documents*
  Specifies whether a cover sheet is generated for PDF overviews of documents.

- *Use Watermarks*
  Defines whether documents are automatically converted into protected PDF documents with a definable watermark.

- *Remove PDF document restrictions on upload*
  Specifies whether the PDF document restrictions are removed when uploading PDF documents. User passwords will not be removed.

"General" tab

- *Name*
  The name of the configuration.

- *Subject*
  The description of the configuration.

- *Terms*
  In this field terms can be set to keyword current objects.

- *Tags*
  Tags can be set in this field. The tagging function is also used for keywording objects.

- *Category*
  Allows assigning a category for the current object.

- *Object Class*
  Displays the object class of the current object.

- *Highlight Color*
  In this field, how the object should be displayed can be specified. ("Regular", "Highlighted", "Red", Blue", etc.)

- *Fabasoft Cloud ID*
  This field displays the cloud ID (address) of the current object.

- *Import identifier*
  Use this field as identification for importing from external systems. This ID should be unique in the corresponding context.