Fabasoft®

User Help

Xpublisher Media Edition

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For the sake of readability, gender-specific distinctions, such as “users,” have been omitted. In the spirit of equal treatment, such terms generally apply to both genders.

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1 Introduction

Xpublisher Media Edition is an intelligent, centralized, and always-available software system for your magazines. From the initial idea through topic planning to the publication of articles on digital and analog channels, the solution supports the entire content lifecycle. With the integrated Xeditor, you have access to a professional online XML editor that enables authors to intuitively create and edit structured content in XML format.

2 Preparation

This chapter helps you get started. You will receive an overview of the basic setup and operation of the system.

2.1 Initial Registration

After completing your purchase of the solution, you will receive a registration link via email for initial registration. Enter your login credentials and log in to Fabasphere.

When you log in for the first time, the welcome screen may display messages indicating, for example, that certain data still needs to be completed.

This applies to:

- the designation of a person to be notified in the event of a personal data breach (Data Protection Officer)
- the specification of important contact information for the organization
- the designation of a compliance manager
- the installation of the Fabasphere Client
  For more information on this, see the chapter “2.2.3 ” under “Fabasphere Client .”

Click on the respective link on the Welcome Screen to perform the corresponding action.

Note: The Welcome Screen is only displayed if there are notifications for you.

2.2 Basic Operation

The following chapters provide an introduction to using the web client.

2.2.1 Web Client Structure

This chapter will familiarize you with the structure of the web client and navigation within the system.

Home

After successfully logging in, you will be directed to your personal Home Dashboard.

Depending on which solutions you have been licensed for and your personal settings, various widgets (e.g., “Personal Folder,” “Worklist”) will be displayed. The dashboard concept of the Home area offers you options for customization. For example, you can show or hide the widgets and adjust their size and arrangement.

Media Edition Dashboard

By clicking on the “Media Edition” widget, you can access your personal Media Edition dashboard, which is used below to explain the general structure of the web client.

The web client is divided into the following sections:

- **Header Bar**
  In the header bar, you will find your organization’s logo on the left (if available) and, on the right, the account menu (your username), the data location menu, the Support button, the Logout button, the Quick Access button, the Home button , and the search field.
  Notes:
  - The header and title bar are always displayed—regardless of where you are currently in the system. This gives you access to the actions there (e.g., Support, Search) at any time.
  - For more information on the powerful full-text search with Mindbreeze, see the Fabasphere AI Core user guide in the chapter “Searching with Mindbreeze.”
- **Title** Bar
  The title bar displays the breadcrumbs for the currently open hierarchy. If you are in a widget, the other widgets on the same level are displayed as tabs.
- Content Area
  The content area generally displays the content of the current solution. This can include, for example, the widgets of the Home or Media Edition dashboard, the results list of a search query, or the preview of an asset.
- Toolbar
  The Toolbar is generally available throughout the system, but not directly on the “Home” page. In the Toolbar, you’ll find context-sensitive “Actions.” Typical actions in the Toolbar include “Team,” “Settings,” or “Time Travel.”
- **Tree View or Favorites**
  Additionally, you can show or hide the “Tree View” or “Favorites” area anywhere in the system, except on the “Home” page. The tree view allows you to quickly orient yourself and navigate within the system. You can add frequently used objects (e.g., folders or products) to your favorites. To do this, navigate to the desired object. An option to add the item will then appear in the Favorites section. Alternatively, you can right-click on the item and select “Add to Favorites” under “Extras.”

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

2.2.2 Performing Actions

The following basic options are available:

- Click the left mouse button on the desired button to perform the corresponding action.
- The "Actions" toolbar always contains the most important actions in the current context. The actions relate to the object displayed in the content area. For example, if you are in a content, you can open the content for editing in the integrated Xeditor using the "Edit" action.

- You can open an element's context menu by right-clicking. Typically, the context menu includes actions that are also available in the toolbar, as well as additional, less frequently used actions.
  - Context Menu of Objects
    Right-click on an object in the content area. The context menu for this object opens.
  - Context menu of the title bar
    Right-click on the title bar. The context menu for the object currently displayed in the content area opens.
  - Background context menu
    If you are in a Teamroom or folder, right-click in an empty area of the content pane. The context menu contains actions relevant to working with lists (for example, creating a new object in the list).
- To select entries in a list, click the checkbox next to the corresponding entries. This allows you, for example, to execute a context menu command on multiple objects.

2.2.3 Fabasphere Client

To work efficiently, we strongly recommend installing the native Fabasphere Client. The Fabasphere Client is available for Microsoft Windows, Apple macOS, and Ubuntu.

You can start the installation via the web browser status (Account menu (your username) > "Status" > "Web browser status"). If your organization's policies do not allow installation on your device, please contact your IT support.

For more information, please refer to the white paper "Fabasphere Client."

2.3 Organization Management

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

2.3.1 Create Users

To create a user, follow these steps:

1. Navigate to your organization via "Home" and then to the "Members" section.
2. Click the "Add Members" action.
3. Enter the user's email address in the *User (Email Address)* field.
4. Click "Invite New User" in the dropdown menu.
5. Enter the *first* and *last name*, then 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 to each member.

The added members can register for the first time using the invitation emails that were sent.

Note: You can also create members in bulk using a CSV file via the "Import Members" action. In the corresponding action dialog, you have the option to download a CSV template.

2.3.2 Create Teams

In addition to the automatically created teams, we recommend creating the following three teams:

- App Administrators
  Members of this team should be able to edit the Media Edition configuration. They should also be granted full access to workrooms and magazines.
- App Users
  Members of this team should be able to use the solution (generally: editorial department staff).
- App Users (External)
  Members of this team should be granted access to specific areas for which they have been authorized (generally: suppliers, customers, and external staff).

The purpose of creating these teams is to simplify the initial setup, administration, and use of Media Edition through role-based management of access rights. To create the teams, proceed as follows:

1. Navigate to your organization via “Home” and then to the “Teams” section via the “Members” section.
2. Click the "Create Team" action.
3. In the *Name* field, enter "App Administrators" and click "Create."
4. Navigate to the team you just created and click "Add team members."
5. Select the desired members in the *Users* field.
   Note: During a pilot phase, add only the users designated for this purpose. 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 “Add.”

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

2.3.3 Authorize teams

To authorize the teams in the app configuration, proceed as follows:

1. Navigate to your organization via “Home,” then to the “Licenses”/“License Management” section, and finally to the “App Configurations” section.
2. Select the "Configuration".
3. Click the "Permissions" action.
4. Click the plus icon next to the "App Administrator" role to open the search field.
5. Type “App Administrators” and press Enter to search for the previously created team.
6. In the dropdown menu, click on the "App Administrators" team.

7. Repeat the process and add the "App Users" team to the "App User" role.
8. **Optional**: For the "App Administrator" role, remove the automatically added organization owner (context menu command "Remove") to ensure consistent role-based permissions.

For authorized members, the "Media Edition" dashboard is saved to the Home screen. If roles are assigned while users are logged in, they must refresh the page (F5 key) for the dashboard to be saved.

After the pilot phase ends, you can, if necessary, create additional app user teams to authorize different users (or user groups) in workrooms and magazines.

Notes:

- If you accidentally grant permissions to the wrong team or user, click “Remove” in the context menu of the team member.
- Beyond the initial setup of the system, you can find general information on organizational management in the “Fabasphere AI Core Administration Guide.”

2.4 Getting Started with Media Edition

Once the initial permissions have been assigned by the organization owner (see chapter 2.3.3 “Authorize teams ”), the designated app administrators can perform the initial setup. If you are a Media Edition user, proceed to the following chapter.

3 Structural Elements of the Media Edition

The main structural elements of the Media Edition are:

- *Media Edition Dashboard*
  The dashboard is the central access point to Media Edition for users. When a user is added to the configuration as an app user, a dashboard is automatically generated and placed on the “Home” screen as a widget (“Media Edition”).
- *Configuration*
  General settings that apply to magazines are configured here. You must be an app administrator to edit the configuration. To access the configuration, navigate to "Home" in the Media Edition dashboard and then click the "Go to Configuration" action.
- *Workrooms*
  Workrooms are used for the structured management of digital content and for defining access rights. Magazines can also be defined within workrooms. Additionally, assets, topics, and contents can be created in workrooms. They thus serve, at the highest level, to structure and separate your organization’s data. For example, a workroom may be visible only to a specific editorial team.
- *Magazines*
  Access rights can also be assigned to magazines. Similar to workrooms, assets, topics, and contents can be created within the context of magazines, which are then only available to users authorized for that specific magazine. Additionally, the magazine allows for the creation of issues.

- *Issues*
  An issue is the actual issue of a magazine. Here, layouts, contents, and media assets are compiled into publishable content.

4 Media Edition Dashboard

The Media Edition Dashboard is your access point to Media Edition.

When you are added to a configuration as an app user, a dashboard is automatically created and placed on the "Home" screen as a widget ("Media Edition"). When you are removed as an app user, the dashboard/widget is also removed.

The Media Edition dashboard is divided into the following sections:

- *Calendar*
  Displays tasks and appointments for issues, topics, and contents that you have access to.
- *Magazines*
  Displays the list of magazines to which you have access.
- *Topics*
  This widget is your gateway to a search-based list of all available topics.
- *Contents*
  This widget is your gateway to a search-based list of all available contents.
- *Media Assets*
  This widget is your gateway to a searchable list of all available image, audio, and video assets.
- *All Assets*
  This widget is your gateway to a search-based list of all available assets.
- *Workrooms*
  This widget is your gateway to the list of all workrooms you have access to.

Note*: Users only see the objects they are authorized to access.*

You can perform the following actions:

- *Create Content*
  This action allows you to create a new content. The workroom to which the content is to be assigned must be specified in the next step.
- *Create Topic*
  This action allows you to create a new topic. The workroom to which the topic is to be assigned must be specified in the next step.
- *Create* Asset
  This action allows you to create a new asset. The workroom to which the asset is to be assigned must be specified in the next step.
- *Upload*
  Allows you to upload a file from your device. The workroom to which the resulting asset should be assigned must be specified in the next step.

- *Create Magazine*
  Allows you to create a new magazine. The workroom to which the magazine is to be assigned must be specified in the next step.
- *Create Workroom*
  Allows you to create a new workspace.
- Branding
  Allows you to customize the system to match your corporate design by customizing the logo, background color, and background image.
- *Switch to Configuration*
  Using the "Switch to configuration" action, you can view the configuration associated with the dashboard.
- *Chat with Company Knowledge*
  This action opens an AI chat that allows you to chat using predefined contexts. These must be defined in advance by an administrator in order for the action to be visible.
- *Settings*
  Using the "Settings" action, you can configure general properties of the Media Edition dashboard (e.g., notification settings).

5 Workrooms

Workrooms are used for the structured management of digital content and for defining access rights to enable effective collaboration.

You can create your content within workrooms and use multiple, parallel workrooms to control access rights in a granular manner. Workrooms have their own dashboard that grants you access to all magazines, topics, contents, and assets stored in that workroom.

5.1 Relationship Between Workrooms and Fabasphere Teamrooms

Workrooms are based on the concept of Fabasphere Teamrooms and therefore feature their functionalities and configuration options. The scope of Teamrooms' features is described in detail in the general Fabasphere AI Core user guide in the chapter "Collaboration with Teamrooms" and includes, among other things, the following functionalities:

- Creating and structuring Teamrooms.
- Creating, editing, organizing, and more with documents in Teamrooms.
- Granular definition of access rights on a user and team/role basis.

5.2 Settings

In addition to the Teamrooms settings, the settings described below are available for workrooms. To configure these, navigate to the relevant workroom and select the "Settings" action in the toolbar.

"Default Values" tab

- *Default thesaurus for new terms*
  If a default thesaurus is specified, new terms can be created directly during indexing.
- *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*: Here, for example, you can store a metadata form created in the configuration for new assets in this workroom. This is then available as an additional tab for all newly created/uploaded assets of the selected object class for this workroom.*
- *Standard Processes*
  When an object is created, the specified process is assigned 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***: Here, for example, you can define a standard BPMN process modeled in the configuration for the asset repository. This process is automatically started as soon as an object of the selected object class is created or uploaded to the corresponding asset repository.*
- *Additional Standard Background Tasks*
  When an object is created, the specified background tasks are assigned.

Notes:

- The default properties override or extend the specifications in the configuration.
- To assign default values (e.g., processes or metadata forms), these must first be created by administrators in the configuration and approved for use.
- Additional settings for workrooms, which are also available for Teamrooms, such as security settings, can be found in the general Fabasphere AI Core user guide.

6 Magazines

Magazines can be created within workrooms. These are also considered "rooms" in the context of Fabasphere AI Core and allow for different permissions than the workrooms in which they are contained. Using the "Create Magazine" action, you can create a new magazine within a workroom if you have the "Editor-in-Chief" or "Full Access" roles.
Each magazine within a workroom has its own dashboard. Here you will find a calendar filtered to show the dates for this magazine, as well as entry points to topics, contents, and assets for this magazine. What makes magazines special is that you can create and edit issues here. Each magazine also has an archive for past issues.

6.1 Issues

In a magazine, you can create specific issues of that magazine, where the layouts, content, and media assets of that issue can be planned and organized using a page layout and a structure tree.
Within the magazine, users with the roles "Editor," "Editor-in-Chief," and "All Rights" can

create new issues.
From a magazine's dashboard, you can navigate to a specific issue via the "Issues" list. An issue describes the structure of content and consists of individual components. It is designed for print media, which are finalized in a layout plan using layout templates, text, and images.

6.1.1 Create Issues

Standard Issues can be automatically generated based on the issue type and templates. To create a new issue, follow these steps:

1. Navigate to the magazine dashboard where you want to create an issue.
2. Select the "Create Issue" action in the toolbar.
3. Select whether you want to create an issue from a template or from an issue type.
   Note: Like other objects, issues can also be saved as templates (Context menu > Tools > Add to Template Collection). This allows you to easily reuse predefined structures.
4. Specify the following metadata:
   - *Name*
     Defines the name of the issue and is pre-filled by the system.
   - *Issue Type*
     Defines the issue type, which specifies the components that make up the issue and how it can be published.
   - *Issue Number*
     Defines the issue number.
   - *Year*
     Defines the year of the issue.
   - *Editorial Deadline*
     Allows you to set the editorial deadline, which is displayed in the calendar.
   - *Description*
     Allows you to specify a description for the issue.
   - *Publication date*
     Allows you to set the publication date, which is displayed in the calendar.
   - *Title*
     Defines the cover story for this issue
   - *Number of Pages*
     Defines the planned number of pages for this issue.
   - *ISSN*
     Defines the ISSN for this issue.
   - *"Dates" tab*
     In the Dates tab, you can enter additional dates relevant to this issue, which will be displayed in the calendar.
5. Click "Next."

Note: *Since users must select an issue type when creating an issue, the preconfiguration of at least one issue type is a necessary prerequisite. For more information on this, see the administration help.*

6.1.2 Working with Layout Planning

Navigate to your issue and ensure that you are at the root or top level in the structure tree. The issue is now displayed in the layout planning view in the content area. The individual pages of your product are displayed with page numbers, grouped by components. If you work with sections or statuses, these are displayed as (colored) bars above or below the page preview.

You can edit your issue directly in Layout Planning. The following features are available to you in Layout Planning:

- *Add blank pages*
  Clicking the "Plus" icon inserts a blank page within the component.
- *Add layout template*
  By double-clicking on a blank page, you can add a preconfigured 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 issue name, the entire issue is displayed. If you selected a component or section, the view is filtered to show its contents. If, on the other hand, you last clicked on a layout template or page, its PDF preview is displayed.*

6.1.3 Working with Structure Planning

The structure tree is a hierarchical representation of your issue. You can navigate the issue by left-clicking on an element in the structure tree. Depending on the selected element, the layout view or PDF preview in the content area, as well as the actions available in the toolbar, are adapted to the current context.

The following features are available to you within the structure planning:

- *Structure*
  You can display the structure tree for the issue. You can hide it using the close icon (X) in the structure tree column.
- *Time Travel*
  You can view the issue at specific points in the past. **Note**: For more information on time travel, see the Fabasphere AI Core user guide in the "Time Travel" chapter.
- *Properties*
  You can view and edit the product's metadata.
- *Publish*
  Once you have finished planning your issue, you can start publishing it here. To do so, select a Deployment Format in the dialog box and confirm by clicking "Publish."
- *Publish (Partial)*
  Once you have completed a print component, a section, or a single layout, you can start a partial publication here. To do this, select a Deployment Format in the dialog box and confirm by clicking "Publish."

- *Add Predefined Components*
  If the standard components predefined by the issue type are not sufficient for your needs, you can add additional components.
  Note: You can only choose from the standard components and additional components defined in the issue type.
- *Add a Layout Template*
  You can add additional layout templates to components.
- *Update Preview*
  Generates a current preview of a layout via the InDesign server and updates page numbers and trim areas if necessary.
- *Add Section – Rubrics*
  To further structure an issue, you can "Add Sections" in components. In the corresponding dialog, you can name the section and assign a rubric.
  Note: Rubrics can be used to identify sequences of pages that are logically or thematically related. Rubrics are managed by administrators in the configuration.
- *Add Empty Page*
  You can add a blank page. If you perform this action via the context menu on a layout in the structure tree, the page is inserted immediately after it.
- *Cut / Copy / Paste*
  You can cut or copy the selected element or the underlying subtree and paste it elsewhere in the same or a different structure tree.
- *Delete*
  You can delete the selected element.
- *Send Link*
  Send a link to the selected elements using your local email client.
- *Properties*
  You can view and edit the metadata of the selected item.
- *Edit*
  Depending on the file format, you can "Edit" structure tree elements directly in the web browser or in your preferred local desktop application. For example, you can edit layout templates in your local InDesign desktop application. The installed Fabasphere Client automatically triggers an update of the version every time you save. Contents, on the other hand, can be edited directly in the web browser using the Xeditor.
- *Read*
  Depending on the file type, users can view structure tree elements in the browser or in the local desktop application without the ability to modify them (see *Edit*).
- *Download*
  You can "Download" structure tree elements for viewing and editing without automatic synchronization via the Fabasphere Client. The downloaded file is saved in the download folder—which is defined in your browser settings.
- *Upload*
  You can overwrite elements in the structure tree 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 at the same level of the structure tree, thereby changing the order of components in an issue 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).
- *Find Entry*
  To quickly find an element in the structure tree, you don’t have to expand all elements of the tree structure and search through them manually; instead, you can use the built-in search function. Here, you can use * as a wildcard.
- *Add Tags*
  You can use the tagging function to add keywords to individual components.
- *Add Content*
  You can search the system for Xeditor and Word documents as well as images and add them to the layout template.
- *Update Content*
  The content is always used in the version it had in the structure tree at the time it was added. To update it, you can use this action for a single piece of content or the entire structure tree (at the top level).
- *Remove Assignment*
  You can also remove added assets.
- *Place Content*
  After adding content and/or images to the layout template, you can write them to the template using the “Place Content” action, thereby triggering Adobe InDesign production.
- *Rewrite XML*
  After editing placed text locally in InDesign, you can write it back to the content. Unlike images, where changes are automatically written back, this must be initiated manually for contents.
- *Start New Process - Status*
  In the "Tools" submenu, you can use "Start New Process" for elements in the structure tree. In the corresponding dialog, you can choose between ad-hoc processes and predefined BPMN 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 below the corresponding layout template, depending on the process progress. You can find more details about statuses in the administration help.

Notes*:*

- The available functions depend on the element selected in the structure tree and its object class.
- You can find the actions in the toolbar of the selected element or in its context menu.

- Components in the structure tree may be marked with a warning icon. In this case, the maximum or minimum number of pages for the component has been exceeded or not met.

Moving layouts and blank pages can cause a discrepancy between the preview displayed and the actual page number and page area. An icon in the structure tree will alert you to this. You can resolve this by editing the layout locally in InDesign or by using the "Refresh Preview" action.

6.1.4 Publishing Issues

To create a publication for an issue, proceed as follows:

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

A new publication is created.

The created publication is stored in the "Publications" tab.

Notes*:*

This action is only available if a Deployment Format has been assigned to the issue type used in the configuration

6.1.5 Contents

Within an issue, the "Contents" tab is available. Here you can view a list of all contents already assigned to this issue. While in this list, you can also assign new contents by using the "Add Print Article" or "Create New Print Article" actions to select the appropriate content from the system or create a new one.

7 Topics

Topics can be created within workrooms or magazines. Depending on who should have access to these topics, one approach or the other makes sense. Within workrooms, users with the roles “Editor,” “Editor-in-Chief,” and “All Rights” can create new topics.
Topics are objects that are particularly relevant for multi-channel publishing. They allow you to organize a series of contents and tasks that belong together thematically under the umbrella of a common topic. For a new topic, you can specify the following metadata:

- *Name*
  Defines the name of the topic.
- *Topic Type*
  Defines an optional topic type that specifies which contents and tasks are automatically created when the topic is accepted. Topic types are maintained by administrators and are described in more detail in the administration help.
- *Description*
  Defines the description of the topic.

- *Rubric*
  Defines the rubric for the topic. Rubrics can be created by administrators in the configuration.
- *Attachments*
  Allows you to create, upload, or link attachments from the system.
- *Proposed Print Articles*
  This section lists the print contents from the topic type, but you can also add your own contents, which will be automatically created when the topic is accepted.
- *Proposed Digital Channels*
  This section lists the online contents from the topic type, but you can also add your own contents, which will be created automatically when the topic is accepted.

Click “Next” to create the new topic. A topic is initially created with the status “Proposed”. A user with the role of “Editor-in-Chief” or “Editor” can accept or reject a proposed topic. Only once the topic is accepted can contents and tasks be created there—either automatically or by the user. If a topic is rejected, it is assigned the corresponding status.

8 Contents

Contents can be created in Media Edition with or without the context of a topic. If you only want to publish a content on a specific channel, it often makes sense to create an content without a topic. Contents are assigned to workrooms or magazines. To create a content within a workroom or a magazine, you must have been assigned the roles “Editor,” “Editor-in-Chief,” or “All Rights” in the workroom or magazine. Contents can include print or online articles or various social media posts.

To do this, proceed as follows:

1. Navigate to, for example, the Media Edition dashboard.
2. Select the "Create Content" action in the toolbar.
3. Select the target workroom for the content.
4. Select the desired content from the list of templates and object classes, then click “Next.” Contents can be either Online Articles, Print Articles or a Post for various Social Media Channels.
5. When creating an Online Article or Social Media Post, you can enter the following metadata in the dialog:
   - *Name*
     Defines the name of the article.
   - *Submission Date*
     Defines the submission date of the article and is displayed in the assigned editor’s calendar.
   - *Publication*
     Defines the publication date of the article and is displayed in the assigned editor's calendar.

- *Editor*
  Allows you to assign a responsible editor from among the organization's users.
- *Attachments*
  Allows you to add attachments to this content. Attachments can be newly uploaded or links to existing assets.
- *Topic*
  Allows to define an existing Topic that this Content should be assigned to.
- *Rubric*
  Allows to define a Rubric for the Content.
- *Schema Configuration*
  Defines which schema should be used for editing the content.
  The available schemas are defined in the app configuration.

6. When you create a Print Article, you can fill in the following metadata in the dialog:
   - *Name*
     Defines the name of the article.
   - *Submission Date*
     Defines the submission date of the article and is displayed in the assigned editor's calendar.
   - *Editor*
     Allows you to assign a responsible editor from among the organization's users.
   - *Schema Configuration*
     Defines which schema should be used for editing the content.
     The available schemas are defined in the app configuration.
   - *Topic*
     Allows to define an existing Topic that this Content should be assigned to.
   - *Rubric*
     Allows to define a Rubric for the Content.
   - *Attachments*
     Allows you to add attachments to this content. Attachments can be newly uploaded or links to existing assets.
   - *Target Scope (Pages)*
     Allows you to define the target length as a guideline for the author.
7. Click "Next" to create the content.

After you have created a content, you can find it in the list of contents or, if available, under a topic. When you click on a content, you will be taken to the content's overview page and have the following options:

- *Create Task*
  Create a new task for this content.
- *Edit*
  Opens the content for editing in the integrated Xeditor.

- *Read*
  Opens the content in read-only mode in the integrated Xeditor.
- *Create Follow-up*
  Allows you to create a follow-up for this content. For more information on follow-ups, please refer to the Fabasoft AI Core user guide.
- *Copy*
  Copies the current content to link it to another location in the system or to create a duplicate of it.
- *Delete*
  Moves the current content to the workroom trash.
- *Send Link*
  Allows you to send a link to the current content using your local email program.
- *Properties*
  Opens the content's properties dialog and allows you to edit the metadata.

9 Tasks

Tasks are atomic tasks assigned to a topic or a content. They serve to supplement standard processes that run identically for every content. Thus, tasks allow you to generate specific activities for certain topics or contents. For example, booking a photographer for an interview or requesting a sample for a product test. Tasks generate activities in users' worklists and are also displayed in the Media Edition calendar. To create a new task, proceed as follows:

1. Navigate to a topic or a content and click "Create Task" in the toolbar.
2. In the following dialog, you can now assign the following metadata:
   - *Name*
     Defines the name of the task.
   - *Description*
     Defines the description of the task.
   - *Editor*
     Allows you to specify the assignee for this task, i.e., the user who will receive the associated activity in their worklist.
   - *Start Date*
     Defines the date on which the task can begin.
   - *Deadline*
     Defines the time by which the task must be completed.
   - *Duration (in days)*
     Specifies how long it should take to complete the task.
   - *Predecessors*
     Allows you to define a predecessor task.
3. Click "Next" to create the task.

10 Assets

Assets are digital content such as images, documents, or videos. You can create them in workrooms or magazines regardless of media type, edit them collaboratively, manage them, and semantically enrich them with metadata.

10.1 Metadata

Metadata can be determined automatically by the system (e.g., file size, modification date) or maintained manually (e.g., category, subject). Depending on the object class (or file type) of your asset, the (metadata) fields available in the properties vary. For example, contents are described by their deadline and responsible editor, while images are described by typical image properties such as orientation or EXIF properties.

Embedded image metadata is read when the images are uploaded and displayed in the assets.

For assets, you will find the additional "Digital Asset" tab in the asset's properties, which allows you to define the following metadata:

- *Name*
  The name of the asset.
- *Alternative Name*
  Sets an additional name for the asset.
- *Subject*
  Sets a free-form text as the subject for the asset.
- *Keywords*
  The terms are used to tag the asset.
- *Tags*
  The tags are used to categorize the asset.
- *Description*
  The description of the asset as free text.
- *Location*
  The location of the asset (e.g., the location where a photo was taken).
- *Date*
  The date of the asset (e.g., the date a photo was taken).
- *Licensed from*
  The asset is licensed starting from the specified date. Assets with a license that is not yet valid cannot be downloaded (except by app administrators).
- *Licensed until*
  The asset is licensed until the specified date. Assets with an expired license cannot be downloaded (except by app administrators).
  Note: If neither *Licensed from* nor *Licensed to* is specified, all use cases can be performed as if the asset had a valid license. If only *Licensed from* is specified, the asset is licensed from that date (with no expiration date). If only *Licensed to* is specified, the asset is licensed until that date (with no start date).

- *License Type*
  Specifies the license type of the asset.
- *Contract/License Document*
  Specifies the contract or license document for the asset.
- *License Text*
  The license text as free text.
- *Usable for*
  Specifies the context in which the asset may be used. The available usage types are defined in the configuration.
- *Right of Use*
  The work usage rights for the asset as free text.
- *Copyright/Author*
  The copyright or author of the asset as free text.
- *Creator*
  The creator of the asset.
- *Provider*
  The provider of the asset.
- *Email address*
  The provider's email address.
- *Address*
  The provider's address.
- *Source*
  The source of the asset.

Note:

- For videos, you can specify the second at which the thumbnail is generated in the *"Generate thumbnail at"* field on the "Content" tab.
- In addition to the metadata fields available by default, administrators can create custom metadata forms in the configuration. For more information on this, see in the general Fabasphere AI Core user guide under the chapter "Create a Form."

10.2 Keywords for Assets

Xpublisher offers two options for adding keywords: terms and tags.

10.2.1 Terms

To add keywords to your assets using terms, proceed as follows:

1. Select the assets and open the context menu by right-clicking.
2. Select the "Properties" action if only one asset is selected, or "Edit Properties" if multiple assets are selected.
3. Navigate to the "Digital Asset" tab.

4. Type in the "Terms" field to search for terms or create new ones. Alternatively, you can use the "Choose Terms" field to choose terms from a thesaurus in the hierarchy tree.

Note: Terms are preconfigured in the Thesauri section of the configuration. Administrators can specify here whether the feature is available to users, import and expand existing thesauri, create their own keyword trees, and define whether users are allowed to add their own terms—in addition to existing ones. For more information, see the administration help.

10.2.2 Tags/Tagging

To tag your assets using tags, proceed as follows:

1. Select the assets to be tagged.
2. In the context menu, select the "Properties" command (if only one asset is selected) or "Edit Properties" (if multiple assets are selected).
3. Navigate to the "General" tab.
4. Type in the "Tags" field to search for and select tags

   Note: Tags are fully managed by administrators in the Tags section of the configuration. For more information, see the Administration Help. Unlike terms, users can only use existing tags created by administrators and cannot add new ones.

10.3 Usage history of images, Word documents, and contents

When an image is inserted into one or more contents, this connection is persisted in the "Belongs to" metadata. When a used image is deleted, a warning dialog is displayed to the user.

If an image asset, Word document, or content is used in an issue, the "Belongs to" information is also populated there, and a corresponding warning is displayed if the asset is to be deleted.

11 Xeditor

The Xeditor allows you to edit and create structured content directly in the web browser.

Note: To use the Xeditor effectively, at least one XML schema configuration must have been defined.

11.1 Editing contents in the Xeditor

To edit a content in the Xeditor, select the "Edit" action in the toolbar. The document will then open in the Xeditor.

11.2 Images

With the Xeditor, you can search for images and reference them in the document.

To insert an image, follow these steps:

1. Place the cursor at the desired location in the document.

2. Click the "Image" button in the toolbar.
3. Select an image from the drop-down list.
4. Click the "Insert" button.

A preview of the image will appear at the cursor position.

12 Artificial Intelligence Support

12.1 Translate contents using AI

You can translate contents whose text content was entered in German, English, Italian or French into the other languages. To do this, follow these steps:

1. Ensure that the "Document Language" metadata has been set accordingly for the content.
2. Right-click on the Xeditor document and select "AI Translation" from the context menu.
3. In the following dialog, select the target language for the translation.
4. A notification dialog will inform you that the translation has started in the background.
5. You will receive an activity in the worklist as soon as the process is complete.

12.2 Recognize image content with AI

You can use AI to suggest alternative text and tags for images. To do this, follow these steps:

1. Make sure a correct preview has been generated for the image
2. Right-click on the image and select "Recognize image content with AI" from the context menu.
3. In the following dialog, you will see the “Suggested new tags” as well as the “Matching existing tags.” You now have the option to edit the suggestions generated by the AI.
   The same applies to the “alternative text,” which describes the image for accessible use, for example.
4. When you confirm with "Next," the metadata is written to the image and the "Suggested new tags" are created in the configuration.
   Note: When selecting matching tags, the system always attempts to prioritize existing tags first to ensure consistent tag structures.

13 Administration Help: Configuration

As an app administrator, you can “Switch to Configuration” from your personal Media Edition dashboard. In the configuration, you can adjust general settings, manage app users, and define structural guidelines for topics and issues.

Note: Some configuration tasks can also be performed at the workroom and magazine levels, as well as across solutions at the organizational level. For more information, see the general Fabasphere AI Core user guide in the chapter “General Settings in Configurations and Repositories.”

13.1 Sections

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

13.1.1 Workrooms

This section displays a list of existing workrooms. As an administrator, you can create workrooms here and manage their settings.

13.1.2 Magazines

This section displays a list of existing magazines. As an administrator, you can create magazines here and manage their settings.

13.1.3 Article Presets

Article presets are used to pre-select, for print articles planned within topics, which template and which editor should be associated with that article later. To create a new article preset, proceed as follows:

1. Navigate to the list of article presets and use the "Create Article Preset" action in the toolbar.
2. In the following dialog box, specify the name, the Xeditor schema, and, optionally, the editor for all articles created using this preset.
3. Click “Next”

The article preset can now be referenced in a topic type.

13.1.4 Publication Channels

Publication channels are used to pre-select, for online articles planned within topics, which schema and which editor should later be associated with that article. To create a new publication channel, proceed as follows:

1. Navigate to the list of publication channels and use the "Create Publication Channel" action in the toolbar.
2. In the following dialog, specify the name, the Xeditor schema, and optionally the editor for all articles created for this channel.
3. Click "Next"

The publication channel can now be referenced in a topic type.

13.1.5 Topic Types

Topic types are designed to simplify the creation of topics with recurring patterns in Media Edition. To create a new topic type, proceed as follows:

1. Navigate to the list of topic types and use the "Create Topic Type" action in the toolbar.
2. In the following dialog, define the metadata for the topic type:

- Name
  Defines the name of the topic type.
- Visible in Workroom
  Defines in which workroom this topic type can be used.
- Suggested Digital Articles
  Here you can reference a previously created publication channel. As soon as a topic of this type is created and accepted, a corresponding article is also created.
- Suggested Print Articles
  Here you can reference a previously created article preset. As soon as a topic of this type is created and accepted, a corresponding article is created as well.
- Tasks for Topic
  Allows you to define tasks that are created as soon as a topic of this type is created and accepted.
- Tasks for contents
  Allows you to define tasks for a topic's scheduled contents. These are created as soon as a topic of this type is created and accepted.

3. Click "Next"

The newly created topic type can now be selected by a user when creating a new topic.

13.1.6 Issue Types

Issue types are managed in this section. Administrators can use issue types to define structural guidelines for issues. When creating an issue, users must select an issue type from the corresponding dropdown list. Providing at least one issue type is therefore a necessary prerequisite for creating issues. The choice of issue type determines which standard components are included directly when the issue is created. In addition, users can be provided with a list of optional components that can be created in addition to the standard components.

To create an issue type, proceed as follows:

1. In the configuration, navigate to the "Issue Types" section.
2. Click the "Create Issue Type" action in the toolbar.
3. In the dialog, you can specify a name and define the lists of "*Standard* Components," "*Additional* Components," and "*Deployment Format*s."
4. Confirm by clicking "Next."

13.1.7 Status

Pages (and page sequences) in layout planning can be assigned (editing) statuses. The recommended way to change an asset's status is through the implicit update that occurs after completing an activity from a process. Only administrators can create statuses and specify when they are set automatically.

Create Status

In addition to the statuses delivered in the standard system, you can create additional statuses. Proceed as follows:

1. Navigate to the publishing configuration.
2. Go to the “Status” section.
3. Select the "Create Status" action in the toolbar.
4. Enter a (multilingual) name, select a status icon, and optionally choose a background color.
5. Confirm by clicking “Next.”

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

Automatic Status Setting

To ensure that the status you created is set automatically, you must link it to the completion of a task. To do this, follow these steps:

1. Navigate to the configuration.
2. Go to the "Status" section.
3. In the context menu of the status, click the "Properties" command.
4. Copy or write down the "Fabasphere ID" for the status. You can find it on the "General" tab. **Note**: The Fabasphere ID always begins with `“COO.…”`.
5. Close the status properties and navigate to the “Processes” section of your configuration.
6. Select and open an existing process or create a new BPMN process diagram.
7. Select the task to which you want to link the status change by double-clicking it.
8. Navigate to the "Advanced" tab of the task.
9. In the field “*Expression When Completing the activity”*, enter the following formula, including the “Fabasphere ID” noted in step 3.:
```
cooobj.ObjectLock();
cooobj.FSCFOLIO@1.1001:bostate = COO.…
```
10. Confirm by clicking “Apply” and “Next.”
11. Release the process for use by selecting the "Release for Usage" or "Re-Release" action in the process toolbar.

Notes:

- For more information on process modeling using the BPMN 2.0 standard, see the Fabasphere AI Core user guide in the chapter “Modeling Business Processes with BPMN 2.0.”

13.1.8 Layout Templates

This section manages layout templates that are provided for assignment in the layout planning of an issue.

13.1.8.1 Create Layout Template

To create a layout template, proceed as follows:

1. In the configuration, navigate to the list of layout templates.
2. Click the "Create Layout Template" action.
3. In the following dialog, select the Adobe InDesign version for which you want to create a layout template.
4. Assign a name to the layout template and select the appropriate production service.
5. Next, upload the template itself (.indd file), a mapping file, and a preview file for display in the layout planning.
6. Once a layout of the type "Table of Contents" is selected, an additional configuration appears for selecting a schema file, a custom mapping to be used for placement, and an XSLT transformation that can be used to further customize the table of contents.
7. Confirm by clicking “Next.”

13.1.8.2 Approving and Revoking Layout Templates

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

Users can only view the released version of layout templates and assign them in layout planning. Administrators can view and assign both the released version and the draft of a layout template. To release a layout template or revoke its release, proceed as follows:

1. Open an existing layout template.
2. Click the "Release for Usage" or "Re-Release" action.
3. To revoke approval, click the "Withdraw Release" action.

Notes:

- The current approval status is additionally indicated by an icon in the list of layout templates.
- For a functional InDesign production, the layout templates and XML documents must be coordinated. To do this, object formats from InDesign, for example, must be assigned to the XML elements via the mapping file.

13.1.9 Deployment Formats

Deployment Formats allow you to create specific publications from an issue. Essentially, they determine how a specific issue is converted into a usable PDF via a defined service.

13.1.9.1 Create a Deployment Format

To create a Deployment Format, proceed as follows:

1. In the configuration, navigate to the list of Deployment Formats
2. Click on “Create Deployment Format”
3. In the following dialog, select the type of Deployment Format you want to create

4. Assign a name to the Deployment Format
5. Define the configuration below or upload it (`.joboptions` for InDesign).
6. Click “Next” to confirm.

13.1.9.2 Approve and Revoke Deployment Formats

To enable the app administrator to develop and test a new Deployment Format step by step without affecting ongoing productions, these are subject to an approval process.

Users can only view the approved version of a Deployment Format and assign it in layout planning. Administrators can view and assign both the approved version and the draft of a Deployment Format. To approve or revoke approval of a Deployment Format, proceed as follows:

1. Open an existing Deployment Format
2. Click the "Release for Usage" action.
3. To revoke approval, click the "Withdraw Release" action

Note: The current approval status is additionally indicated by an icon in the list of Deployment Formats.

13.1.10 Sections

This section is used to manage categories. Categories are used to organize issues. Categories can be used to identify sequences of pages that are logically or thematically related.

To create a section, proceed as follows:

1. In the Publishing Configuration, navigate to the list of sections
2. Click on “Create Section”
3. In the dialog, you can assign a name and a HEX color code to the section.
4. Confirm by clicking “Next.”

13.1.11 Components

Components are managed in this area. Issues consist of one or more components. These, in turn, contain layout templates. Components thus further structure issues into individual subsections. They allow you to define the minimum and maximum number of pages or content they can hold. Additionally, by entering a starting page, you can control the number at which page numbering begins in this section. The “Start with right page” checkbox controls how the first pages are displayed in the page layout. Components can thus subdivide traditional print products. To create a component, proceed as follows:

1. In the publishing configuration, navigate to the “Components” section.
2. Click “Add Entry” and then “New” or use the “Create Component” Action.
3. In the dialog, you can specify a name and, if necessary, the minimum and maximum number of pages as well as the options for numbering and right-hand page display.
4. Confirm by clicking “Next.”

13.1.12 Production Services

The list of production services shows the production services that have been configured for creating publications in the Fabasphere organization.

13.1.12.1 Create a production service

To create a production service, proceed as follows:

1. In the Publishing Configuration, navigate to the list of production services
2. Click on "Create Production Service"
3. In the following dialog, select the type of production service you want to create
4. Assign a name to the production service
5. If a global configuration is required for this service (e.g., storing a customer-specific license file), you can specify it in the dialog
6. Confirm by clicking "Next."

   Note: Detailed information about production services and their individual options and settings can be found in separate documents in the online help.

13.1.13 Templates

This section displays the templates provided via the configuration. Nearly all objects, and documents in particular, can be defined as templates. This allows users to create new objects or documents based on this template.

Note: For more information on templates, see the Fabasphere AI Core user guide in the chapters "General Settings for Configurations and Repositories" and "Customizing."

13.1.14 Text modules

This section displays the text modules provided through the configuration. You can use these to insert predefined standard text into Microsoft Word documents.

Note: For more information on text modules, see the Fabasphere AI Core user guide in the chapters "General Settings for Configurations and Repositories" and "Customizing."

13.1.15 Forms and Categories

This section displays the forms and categories provided via the configuration. For example, custom forms can be used to extend objects to store customer-specific data. Categories can be assigned to objects, thereby influencing the behavior of those objects.

Note: For more information, see the Fabasphere AI Core User Guide in the chapters "Forms" and "Categories," as well as the white paper "Model-Based Customizing."

13.1.16 Processes

This section displays the processes provided via 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 through the worklist. Typical processes include approval and release processes.

Note: For more information, see the Fabasphere AI Core user guide in the "Workflow" chapter and the "Model-Based Customizing" white paper.

13.1.17 Reports and OData Services

This section displays the OData services provided via the configuration. The OData service contains the definitions of the object classes and properties that are made available via the OData API.

Depending on where you create the OData service, different source objects can be used. For more information on OData, see the Fabasphere AI Core white paper "Fabsoft Integration for OData."

13.1.18 Tags

In addition to terms managed in the Thesauri section, the tagging function is available for keyword assignment. Unlike terms, tags are managed entirely by administrators in the solution configuration. Users can only use existing tags to assign keywords to assets and cannot create their own.

To create tags and thus make the tagging functionality available to your users for indexing, proceed as follows:

7. Navigate to the configuration.
1. Go to the "Tags" section.
2. Select the "Create Tag" action in the toolbar.
3. Assign a (multilingual) name to your tag. You also have the option to add a comment and specify for which object classes the created tag can be used.
4. Confirm by clicking "Next."

Notes:

- Repeat steps 3–5 if you want to create multiple tags at once.
- You can nest your tags hierarchically to create keyword trees. To do this, navigate to an existing tag and select the "Create Tag" action again, or move existing tags using "drag-and-drop" or "copy-and-paste."

13.1.19 Stamps

Stamps can be defined as Microsoft Word documents or images and applied to PDF documents. Learn more about stamping documents in the Fabasphere AI Core user guide under "Stamping Documents."

13.1.20 Insight Apps

Insight Apps provide aggregated access to information within your organization, tailored to your needs. You can use Insight Apps to display and highlight important information without

requiring users to search for it explicitly. Learn more about the capabilities of Insight Apps in the Fabasphere AI Core user guide under "Insight Apps."

13.1.21 AI Settings

Here you will find the configuration options for AI-powered use cases, which are described in more detail under "Artificial Intelligence."

13.1.22 Default Settings

This section displays the default settings provided through the configuration (view settings, search patterns, time ranges). App administrators can create search patterns. Additionally, it is possible to save view settings in the configuration via the menu command "View" > "View Settings" > "Save."

- **Note**: For more information on default settings, see the Fabasphere AI Core user guide in the "Customizing" chapter.

13.1.23 Thesauri

The Thesauri section manages terms used for indexing. Thesauri are hierarchically nested keyword or term trees. You can create these manually or import existing thesauri. To do so, proceed as follows:

1. Navigate to the configuration.
2. Go to the "Thesauri" section.
3. Select the "New" action in the toolbar.
4. Assign a (multilingual) name to your thesaurus and confirm with "Next."
5. Select the "Create Top Concept" action in the toolbar of your newly created thesaurus to create a term at the top level of the hierarchy. Repeat this step until you have created all your terms at the top level of the hierarchy.
6. Navigate to a term at the top level and use the "Create Narrower Term" action to create additional terms, similar to Step 5. Repeat the previous steps until you have created the desired term structure.

Notes:

- You can create multiple hierarchy levels by creating additional subterms at the lowest level.
- You can move (sub)terms within your term structure using drag-and-drop or copy-and-paste.
- Duplicate terms can be merged using the context menu command "Tools" > "Merge Terms." The term to be replaced will also be replaced in all instances where it appears.
- In addition to or instead of manually creating your terms, you can also import an existing term structure. To do this, select the "Import from File" action in the generated thesaurus and select a file in RDF/XML format from your local file system.

- To allow your users to create new terms directly during indexing, you must define a default thesaurus for new terms in the corresponding section under the "Default Values" tab.

13.1.24 Xeditor Preview Settings

You can enable automatic PDF preview generation for a content. This requires a PrintCSS configuration, which you can define here in the configuration or in the templates and presets of a workroom. This setting is then valid only for that workroom and would override a defined preview setting at the configuration level.

13.1.25 Failed background tasks

Displays failed background tasks (visible only if at least one failed background task exists). You can perform the following manual actions: “Schedule Next Run,” “Send Link,” and “Delete.”

13.2 Actions

You can perform the following actions:

- *Create Workroom*
  Using the "Create Workroom" action, you can create a new workroom in Media Edition.
- *Create Magazine*
  Using the "Create Magazine" action, you can create new magazines.
- *Set description*
  You can define descriptions for workrooms and magazines, or globally for Media Edition. The description is displayed in the content area.
- *Translations*
  Using the "Translations" action, you can export or import a CSV file containing the multilingual names of the Customizing objects. This enables external translation.
- *Show News*
  With this action, app administrators can view news in the current context—in this case, the configuration.
- *Open Recycle Bin*
  The "Open Recycle Bin" action allows you to view objects that have been moved to the Recycle Bin.
- *Settings*
  Using the "Settings" action, you can configure additional settings.
- *Permissions*
  Using the "Permissions" action, you can designate app administrators who are authorized to edit the configuration. App users are authorized to use the Media Edition. The respective permissions are defined via the workrooms and magazines.
  Note: Used licenses are calculated based on the registered users.

13.3 Settings

To configure settings, navigate to your Media Edition dashboard, go to Configuration, and then select the "Settings" action in the toolbar. You can configure the following settings in the various tabs:

"Xpublisher AI" tab

- *Is Permitted to Utilise Xpublisher AI Use Cases*
  Defines which users, teams, or organizational units are allowed to use AI features.
- *Image Analysis Settings*
  Allows you to store a configuration for AI-based image analysis. Here you can define where tags are created and in which languages tags and alternative texts should be generated.
- *Chat Search Contexts*
  Allows you to define contexts for the "Chat with Company Knowledge" feature. The criteria defined here enable a granular definition of the data used to answer questions in the AI chat

"General Settings" tab

- *Name*
  The name of the configuration.
- *Subject*
  Provides a detailed description of the configuration.
- *Holiday Table*
  Defines the holiday table for this context.
- *List Display*
  Defines whether a structured or unstructured list display is used.
- *Restrict links in the Teamroom*
  Defines which types of links may be stored in the configuration.
- *Restrict downloading or opening content on the end device*
  Allows you to restrict which team members are permitted to open or download content on the device.
- *All team members may add members*
  Determines whether all team members can add users to the team or only team members with full permissions.
- *Restrict team members*
  Specifies the organizations, organizational units, teams, and external organizations whose members may be added to the configuration.
- *Primary Administrator*
  Specifies the user who receives the automatically generated email messages regarding the configuration. Otherwise, all app administrators receive the email messages. The user is also listed as a contact in cases where permissions are missing.

- *Process Administrators*
  Specifies the users who can monitor and control the workflows of all Teamroom processes.
- *Support Coordinator*
  Support coordinators have access to all support requests in the relevant context and can perform the same actions as the submitters of the support requests.
- *Support Team*
  The support team handles the internal management of support requests within the relevant context.
- *Enable Advanced Mode*
  Advanced mode includes, for example, working with multiple folders, as well as managing templates and presets.
- *Enable trace output*
  For example, if you use expressions for calculation or validation as a form designer, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace outputs to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

"Publishing" tab

- *Xeditor Version*
  Specifies which version of Xeditor should be used. The default is the current version.
- *Enable warning messages when changing page order*
  Defines whether changing the order of layout templates in the structure planning generates a warning icon on the layouts that may no longer have the correct page number or type area.
- *Enable automatic generation of PDF previews*
  Defines whether every change to a layout template always generates a new preview via the InDesign server. This can lead to increased load and longer processing times.
- *Automatically remove images*
  Specifies whether images should be removed from the structure tree if they have been removed from the layout.

"Logos" tab

The defined logos and background image are used for configuration and personal dashboards.

"AI Settings" tab

These settings are used to provide AI functionality. For more information, see the "Artificial Intelligence" chapter.

"Default Values" tab

- *Default thesaurus for new terms*
  If a default thesaurus is specified, new terms can be created directly during indexing.
- *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.

- *Default Processes*
  When creating an object, 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.
- *Default background tasks*
  When an object is created, the specified background tasks are assigned.
- *Approval Process for Templates and Presets*
  To use templates, text modules, forms, categories, processes, and presets, they must be approved. If a process is to be used for approval, a BPMN process diagram can be stored here. Approval processes must include the "Approve for Use" activity.

"Content Settings" tab

- *Allow comments*
  Determines whether PDF annotations can be added to documents.
- **Note***:* When enabled, you can configure additional settings regarding the allowed and preferred type (public/private) of comments and specify whether users with read-only access are also permitted to content public comments.
- *Allow public links*
  Determines whether public links may be published.
  Note*:* When enabled, you can configure additional settings: You can block content downloads and set default values for access restrictions (validity period and password protection).
- *Generate cover page for PDF summaries of documents*
  Determines whether a cover page is generated for PDF summaries of documents.
- *Use watermark*
  Determines whether documents are automatically converted into protected PDF documents with a customizable watermark.
- *Remove PDF document restrictions upon upload*
  You can specify whether PDF document restrictions are removed upon upload. User passwords are not removed.
- *Maximum number of versions retained*
  Specifies the maximum number of versions to be retained. If this limit is exceeded, the oldest versions are deleted.

"Encryption" tab

- *Encrypt documents*
  Specifies whether documents in the current context should be encrypted. For more details, see the chapter "Encrypting a Teamroom."

Note*: Settings defined during configuration apply to all workrooms and magazines. To define settings for individual workrooms and magazines, users with "Full Rights" can specify them in the settings of the respective workrooms and magazines.*

13.4 REST API

The Media Edition features a REST API that supports a wide range of operations. Detailed documentation is available at this Link.