



Defining a Web Content Publisher Workflow

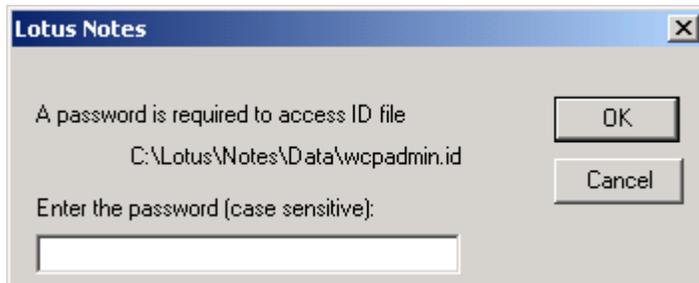
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June 2002

Abstract

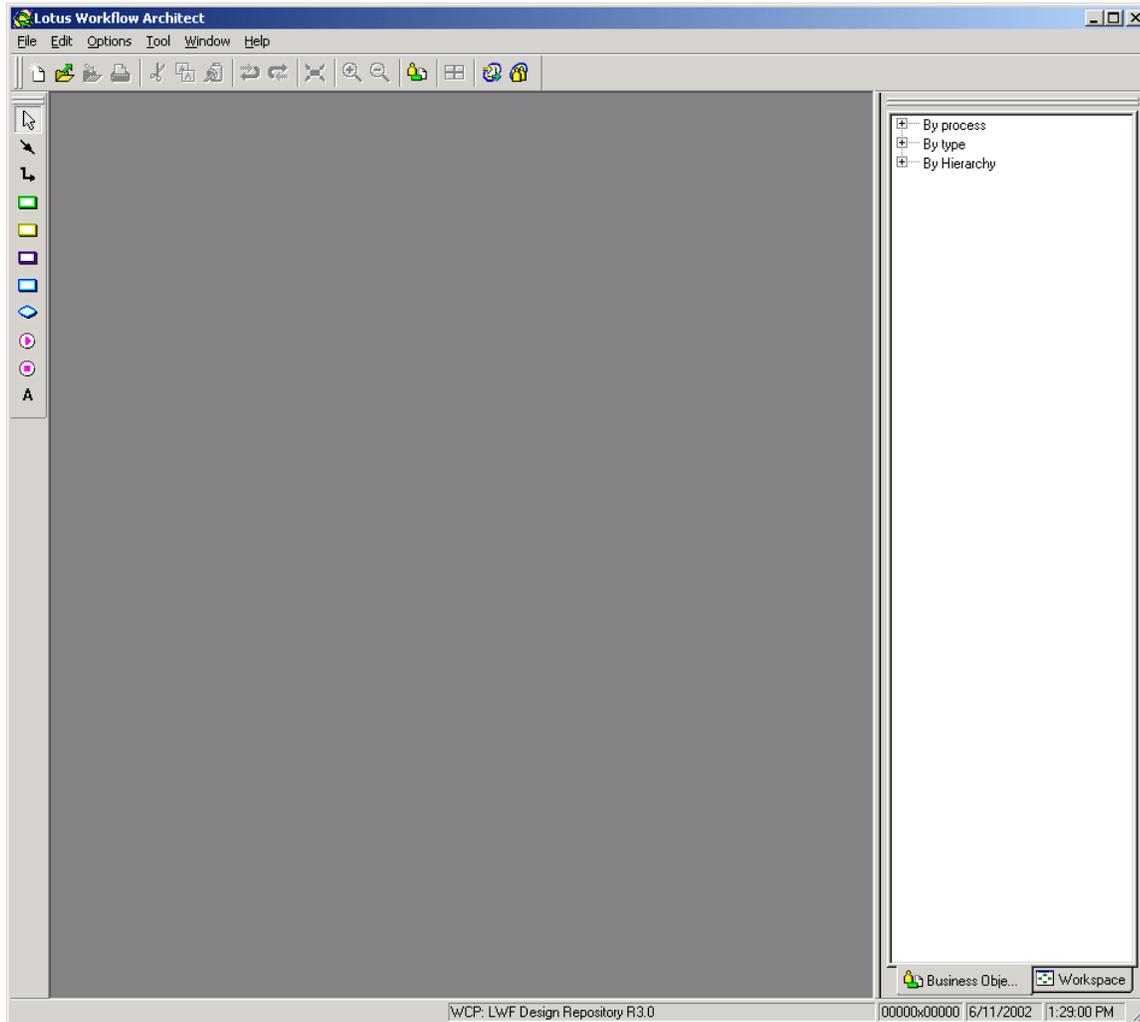
Web Content Publisher (WCP) uses Lotus Workflow (LWF) for routing web content management tasks. Although WCP ships a number of predefined workflows, customers can define their own workflows to better represent the process followed by their content teams. This paper describes how define a WCP Workflow by using a simple example.

Creating the Workflow

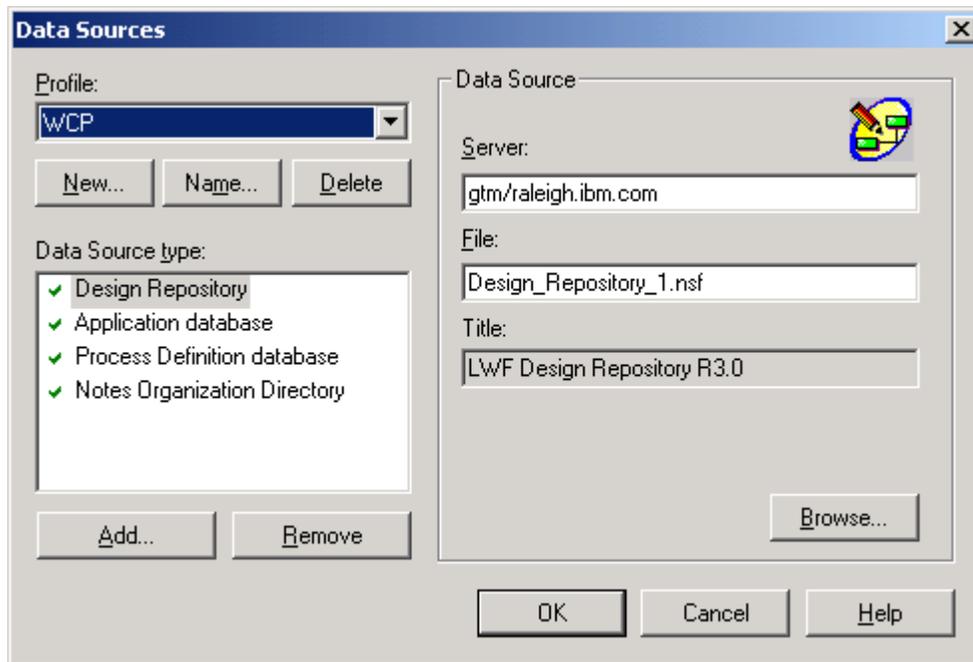
Lotus Workflow Architect is a Windows GUI tool that ships with Lotus Workflow. Start Architect from the Windows Start menu. If a login window is displayed, enter the password of the WCP Admin ID. If this window shows a user that does not have workflow administration privileges (e.g. greg, rob), switch the user id using the Lotus Domino Administrator client's **Tools->Switch ID** menu choice and repeat these steps.



After logging in, you will be at the main layout page where you will define the workflow.

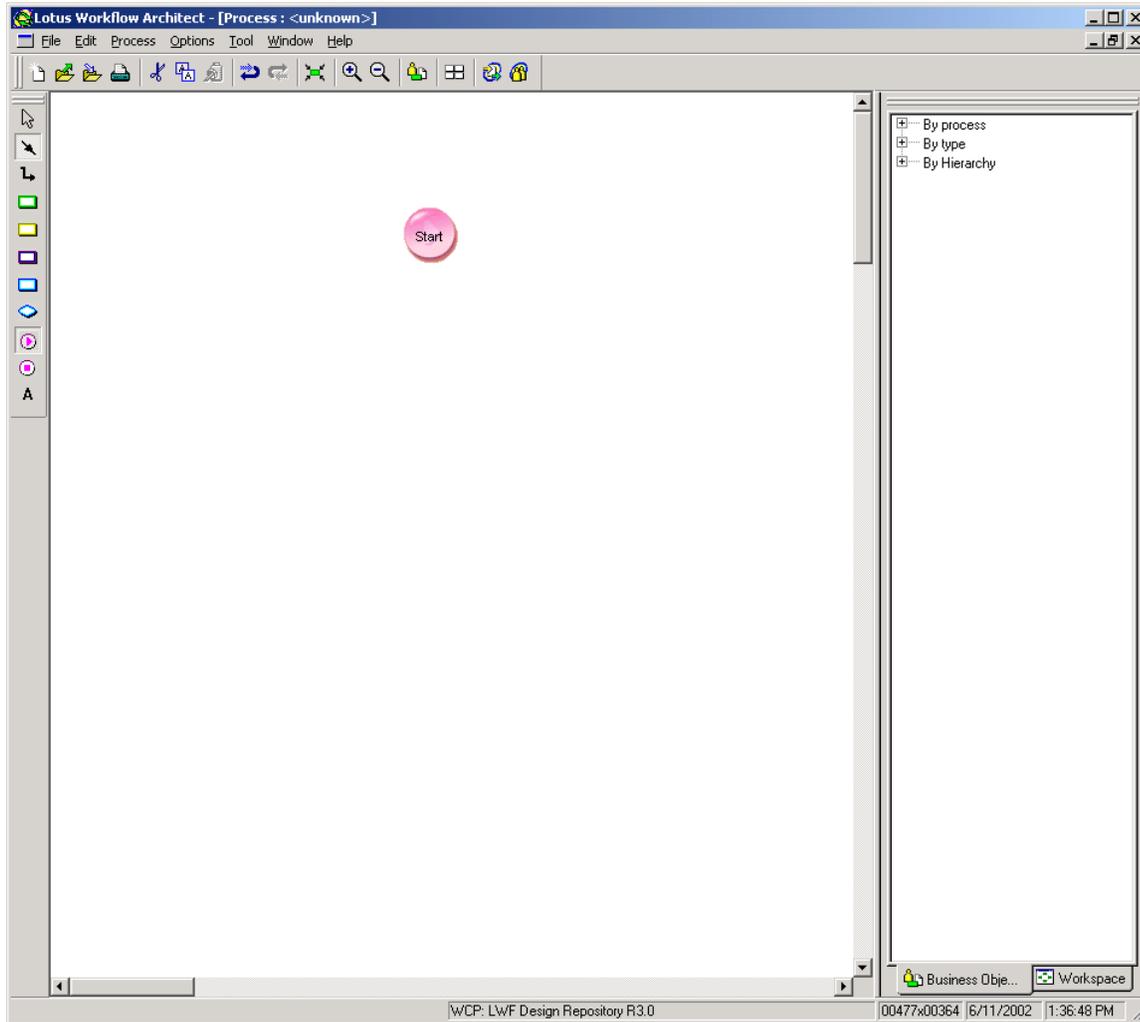


Choose **File->Open databases** to view the following window. The purpose of this window is to select which LWF databases will contain the information in this workflow. If you are using the default databases that WCP created during the installation, click **OK**. At this point, you may be prompted to log in. If this is the case, enter your password so you can open the database.

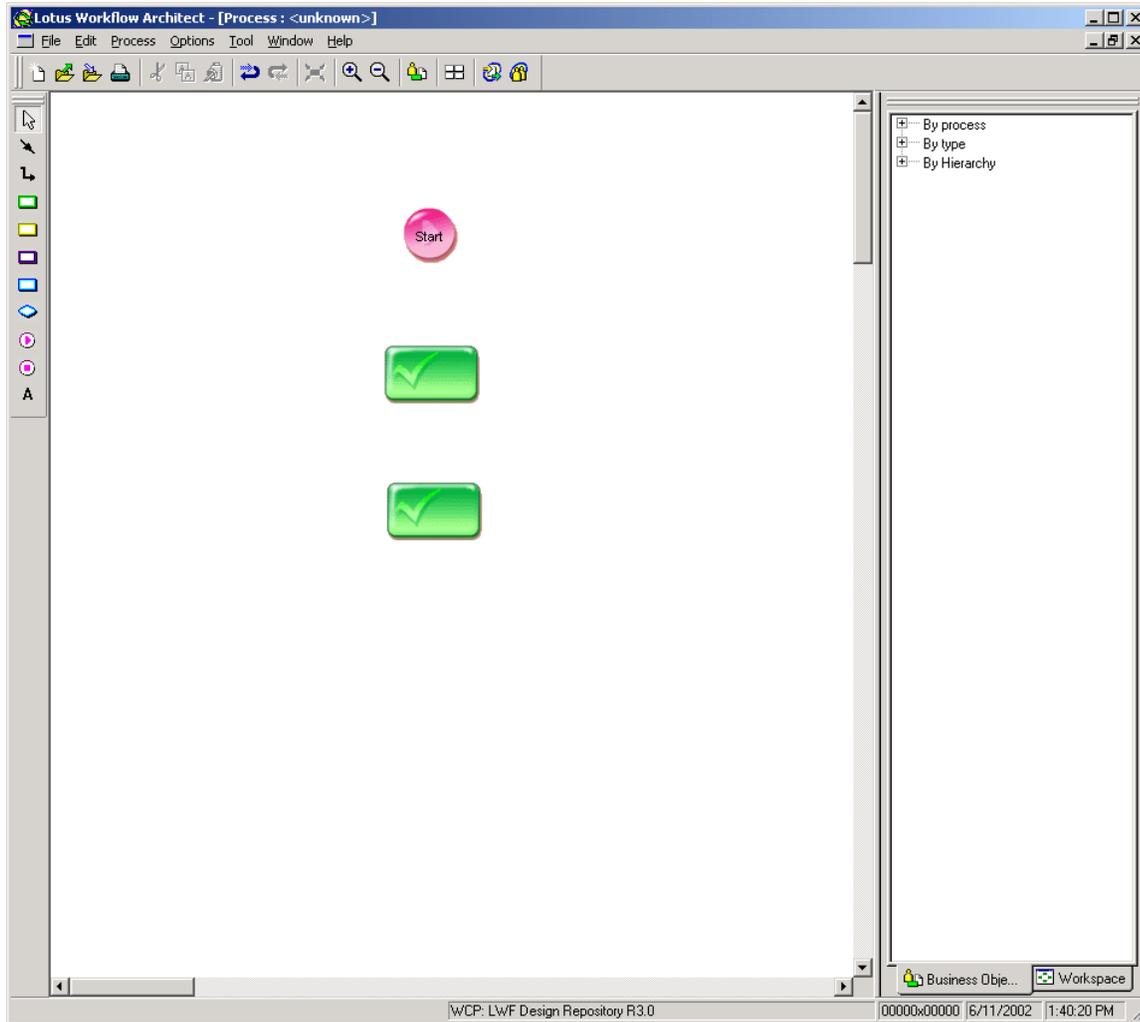


Otherwise, browse for the correct databases and select one database file for each of the four types of databases (e.g. Design Repository). Click **OK**.

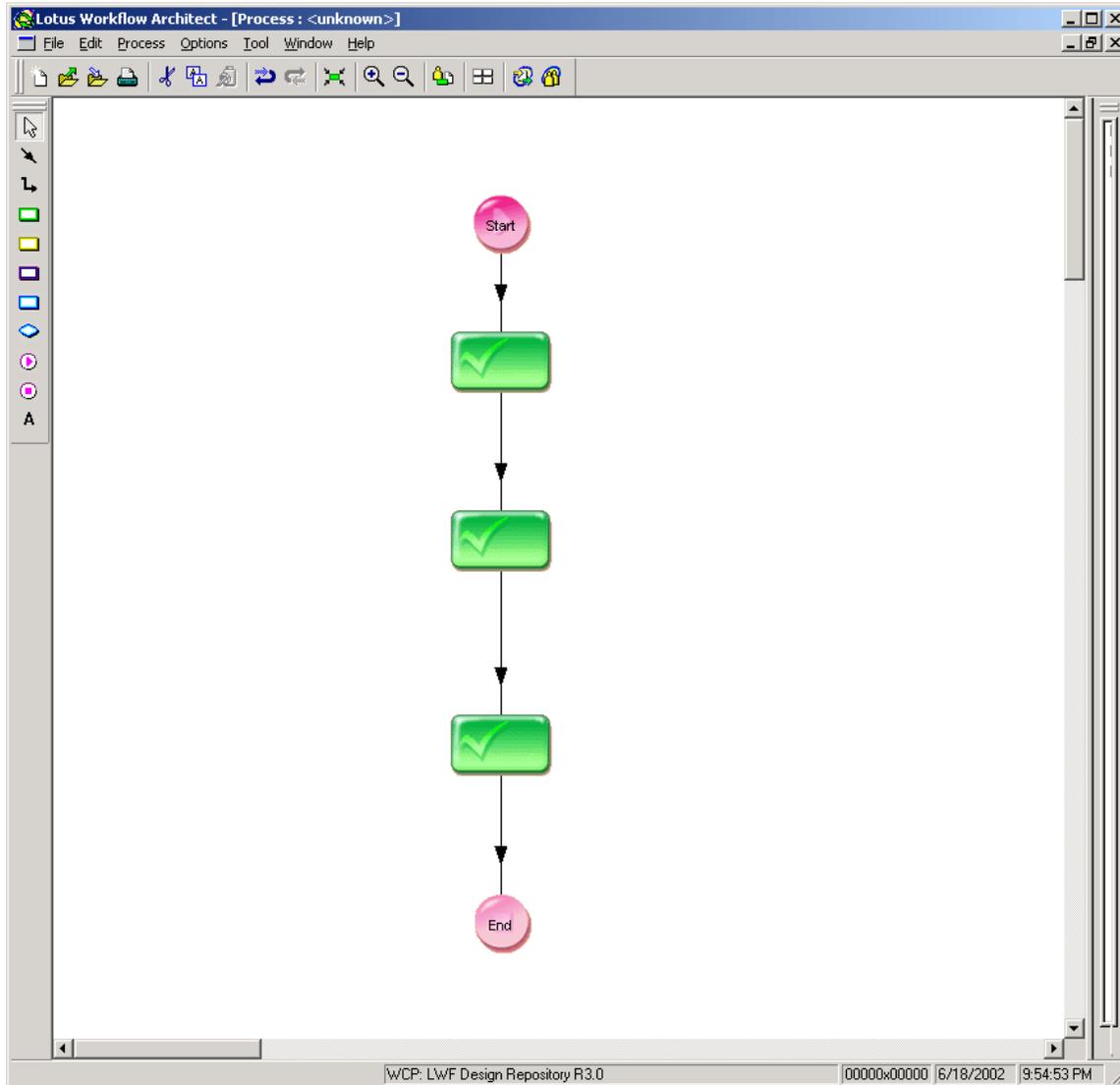
Once the databases are open, select **File->New process** to define the process using the layout editor. Begin by selecting the **Start** icon from the palette on the left and dropping it in the form.



Define the steps in the process by selecting the Activity icon and dropping them in the form. Drop three activities on the palette.

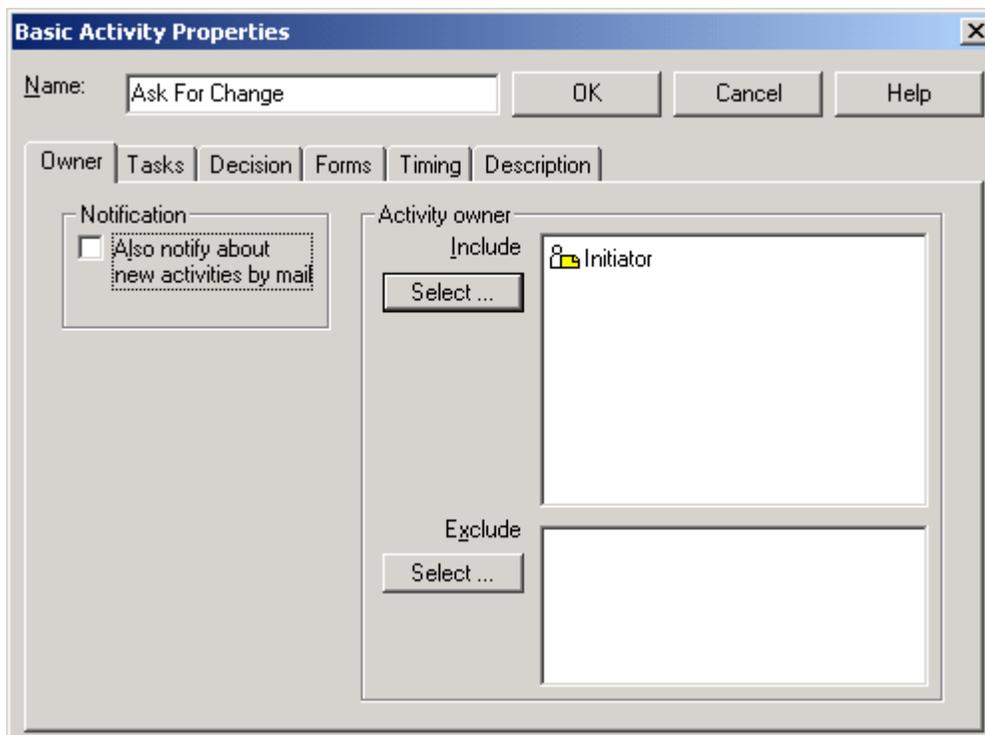
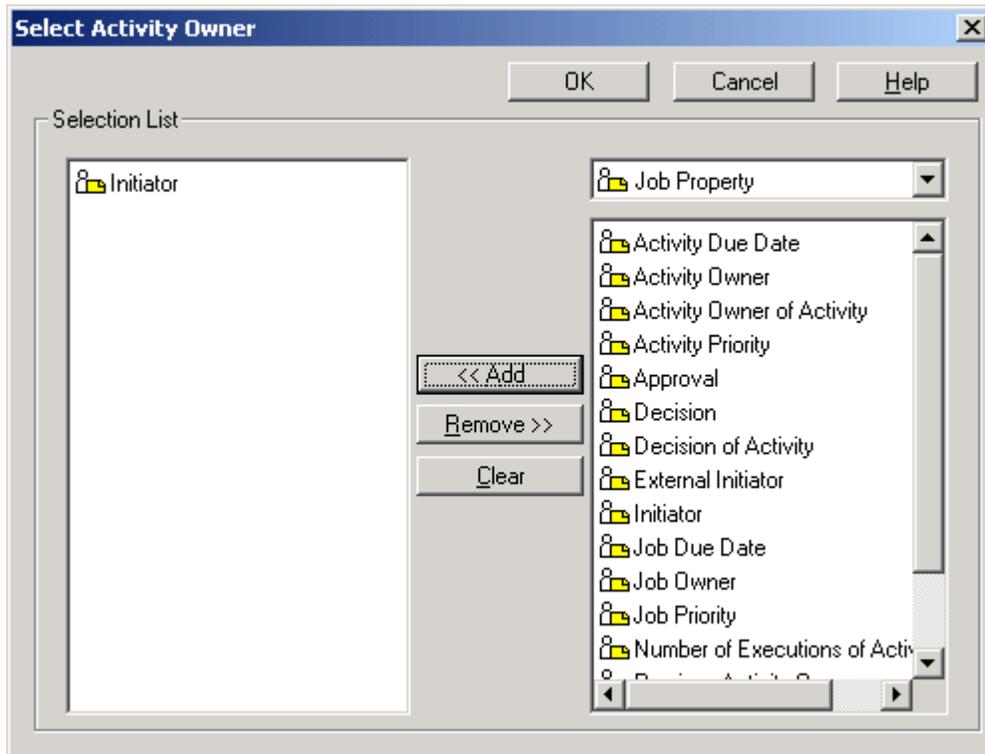


Select the End icon in the palette, drop it in the form. Use one of the connector tools to connect the nodes and define the process flow.



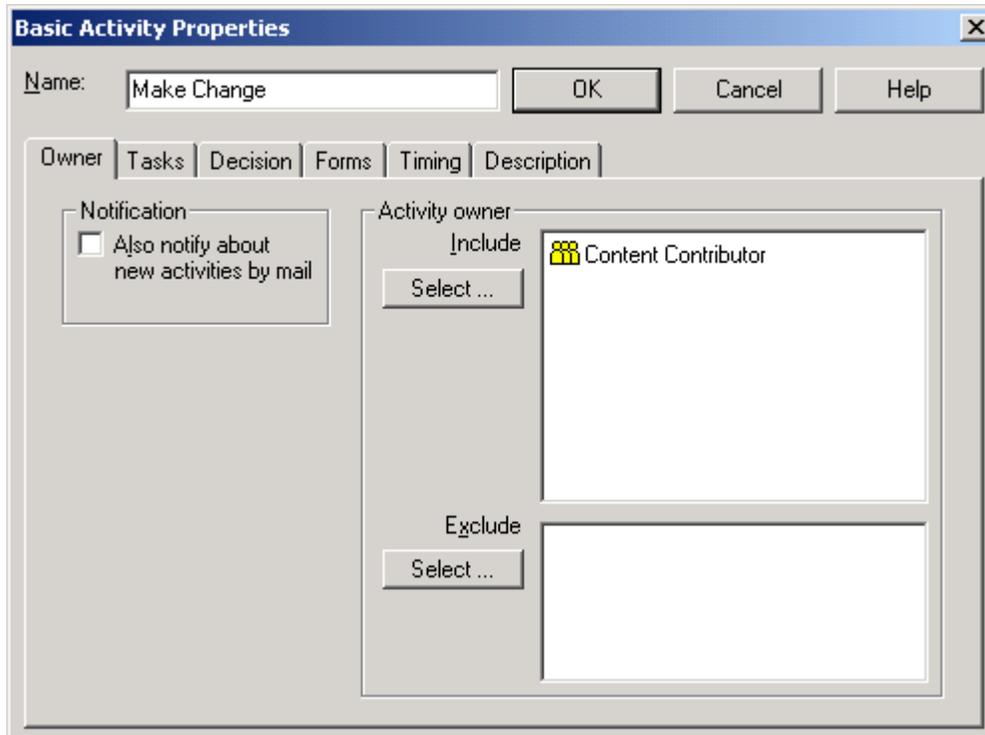
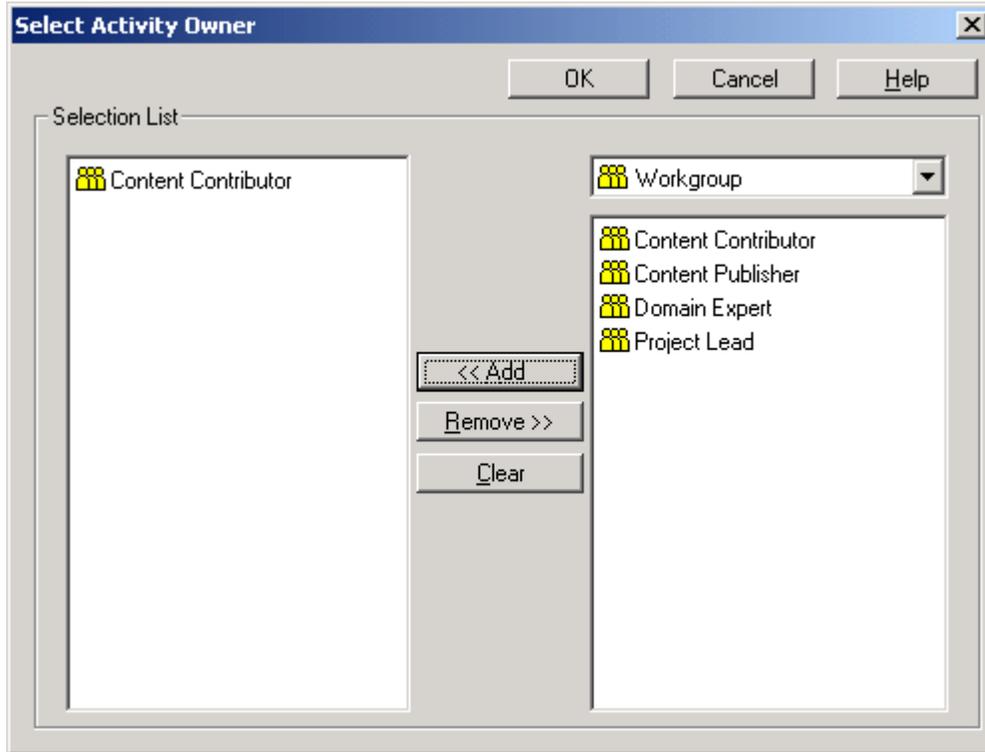
Now, define the meaning of each activity. Right-click an activity and select **Basic Properties**. Each activity must have a name and at least one role or user. The name you assign to the activity is what users see in the WCP web UI when activities are routed to them. The roles define which users to route the activity to.

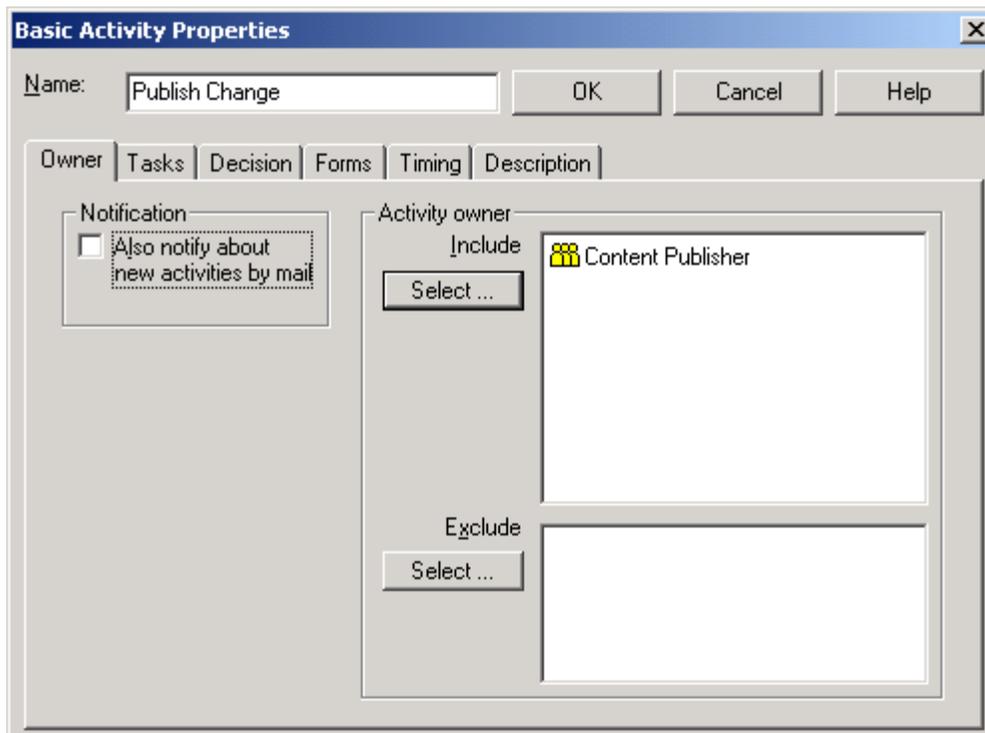
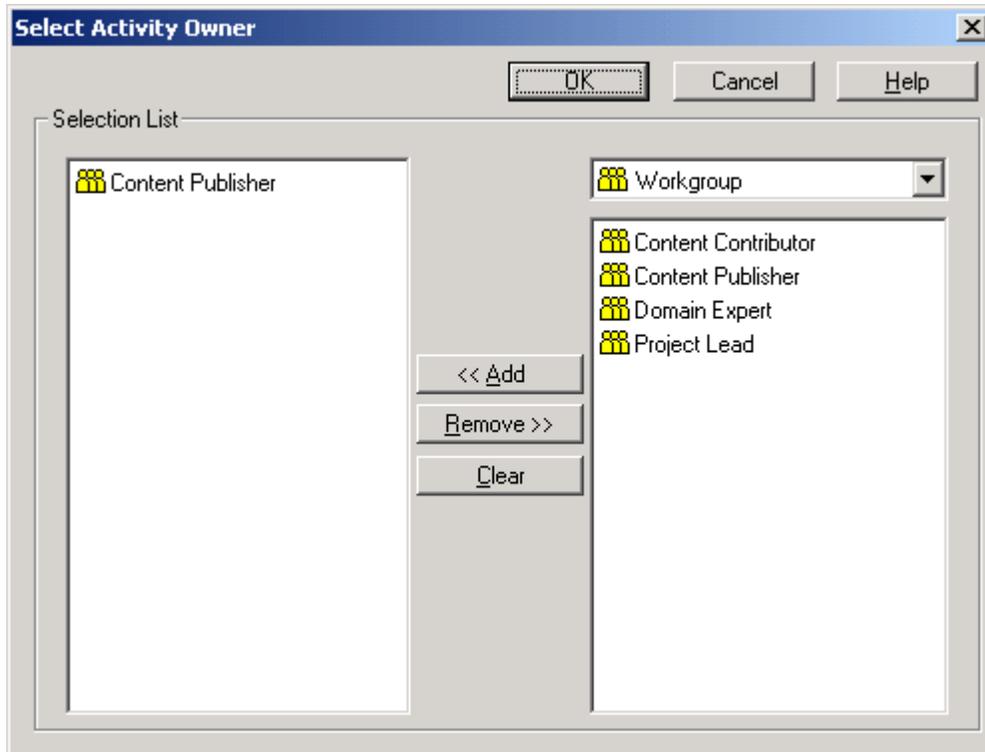
To select the activity owner for the first activity, click **Select**. The Select Activity Owner window is displayed. Then, from the drop-down list, select **Job Property**, choose **Initiator** and add it to the Selection List.



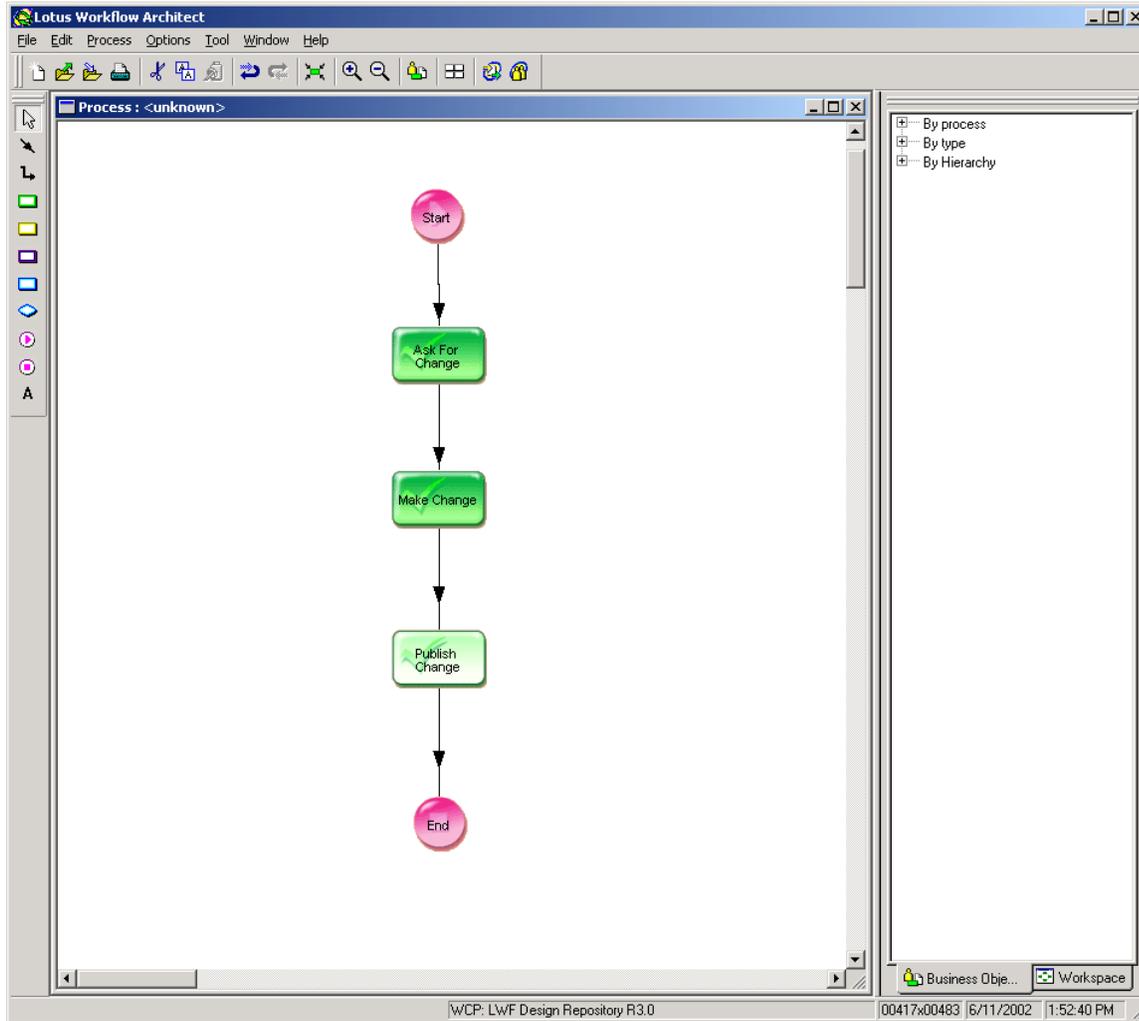
Click **OK**.

For other activities, select activity owners from the Workgroup list.





Having defined each of these activities, the process flow now looks like this:



The next step is to add metadata to each of these activities to control what happens in WCP terms when these activities are processed. For example, when an activity starts, WCP needs to create a workspace in which content changes can be made. There is a set of predefined keywords WCP allows you to attach to activities to control this.

Required attributes

WCM.StartEdit

Start the edit session. When you work on this activity, Web Content Publisher makes the workspace writable. The workspace stays writable until you complete the activity that has WCM.EndEdit.

WCM.EndEdit

End the edit session. Web Content Publisher makes the workspace read-only after this activity is completed.

WCM.Promote

Promote the workspace. Web Content Publisher promotes the workspace when this activity is completed. Note that this is usually the same activity that has WCM.EndEdit. If the activity is a decision, you must also set WCM.Decision.

Optional custom attributes

The following custom attributes are not required but may be useful to change Web Content Publisher behavior in some circumstances:

WCM.Decision

The value of this attribute specifies the positive result of the decision (e.g. "Accept"). This is required if the activity is a decision. This attribute is also used with WCM.Publish and WCM.Export if they are specified on an activity that has a decision.

WCM.ReviewRequest

Indicates this activity is the "Review Request" activity. This attribute ensures that the Web Content Publisher user completing this activity has the authority to review the request.

WCM.ReviewChange

Indicates this activity is the "Review Change" activity. This attribute ensures that the Web Content Publisher user completing this activity has the authority to review the change.

WCM.Publish

Publish to the specified publish targets. The value of this attribute is a list of Web Content Publisher publish targets, separated by commas or semicolons. If this attribute is set, Web Content Publisher will publish to the specified targets when the activity is completed. Note that this is a foreground delta publish. The publish will do nothing if the publish server does not exist.

WCM.Export

Export to the specified target when the activity is completed. The value of this attribute is the target of a Web Content Publisher Export (either a team stream or a directory). Use WCM.Export.Type to specify the type of export. If WCM.Export.Type is not specified, Web Content Publisher will export to version control.

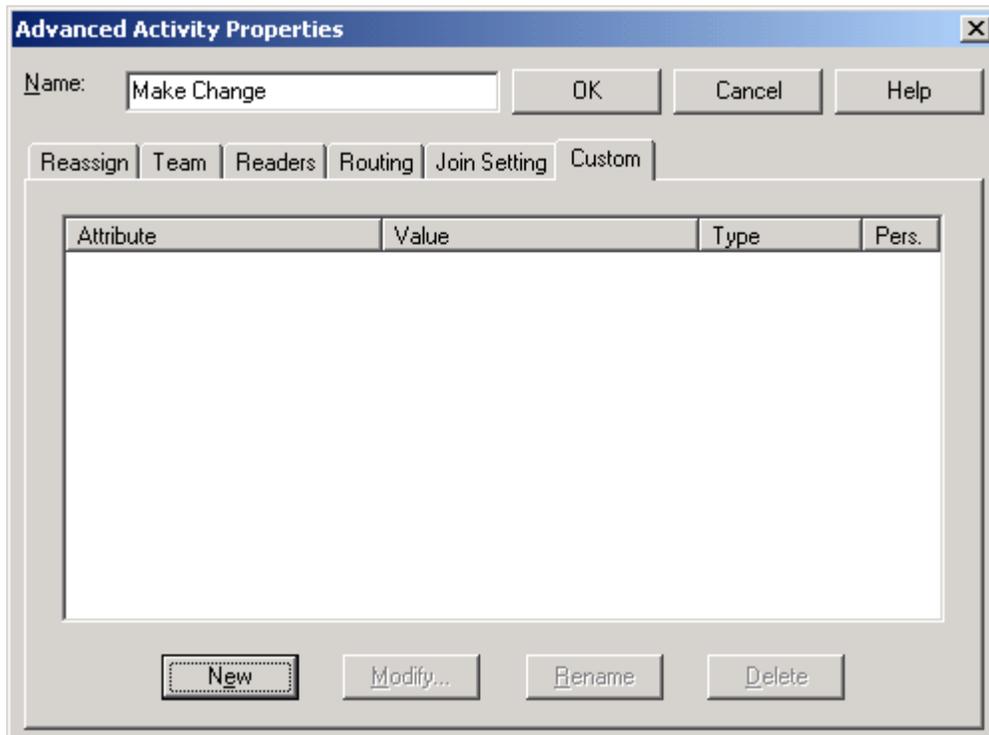
WCM.Export.Type

Specify the type of export. This attribute is used in conjunction with WCM.Export. If WCM.Export.Type is equal to "filesystem," then Web Content Publisher exports to the file system. Otherwise, Web Content Publisher exports to version control.

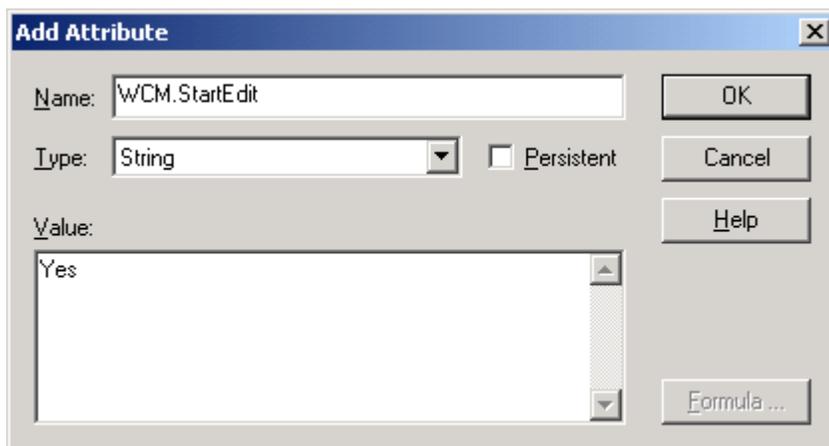
In the simple example described in this paper, we will only use the required attributes and one of the optional attributes.

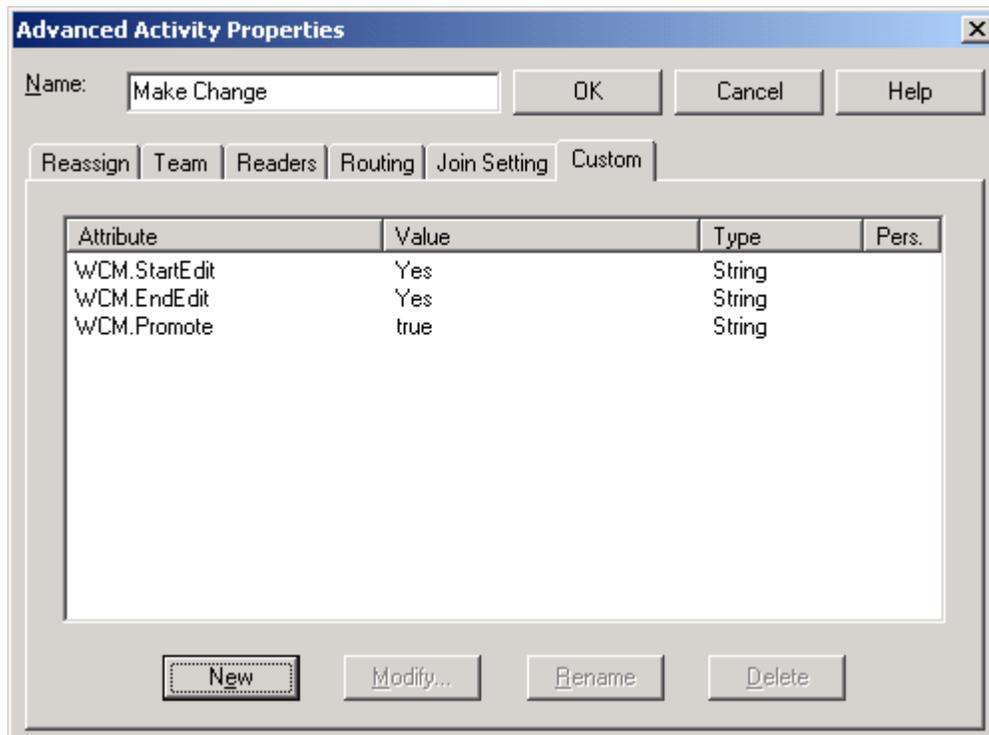
Specify the WCM.StartEdit and WCM.EndEdit attributes in the second step where content changes will be made. When this activity ends, promote the changes to the project edition so they are available for publishing. The second step is also where you specify the WCM.Promote attribute.

To specify these attributes, right-click the activity and select **Advanced Properties**. Click the **Custom** tab.



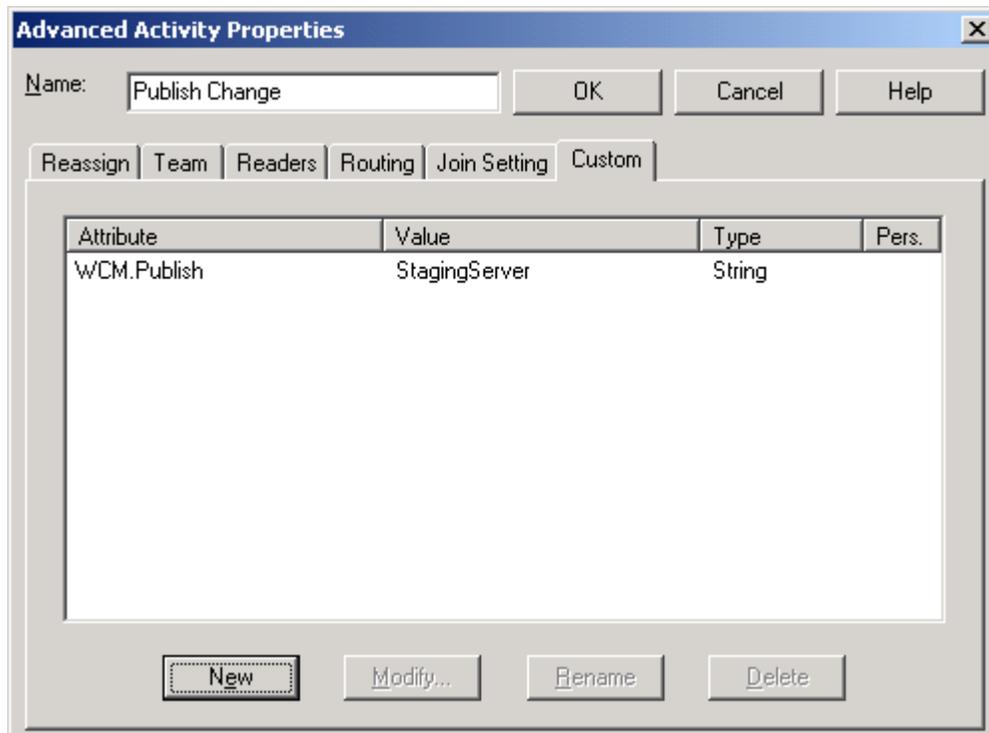
Click **New** to display the Add Attribute window. Enter the attributes in any order.



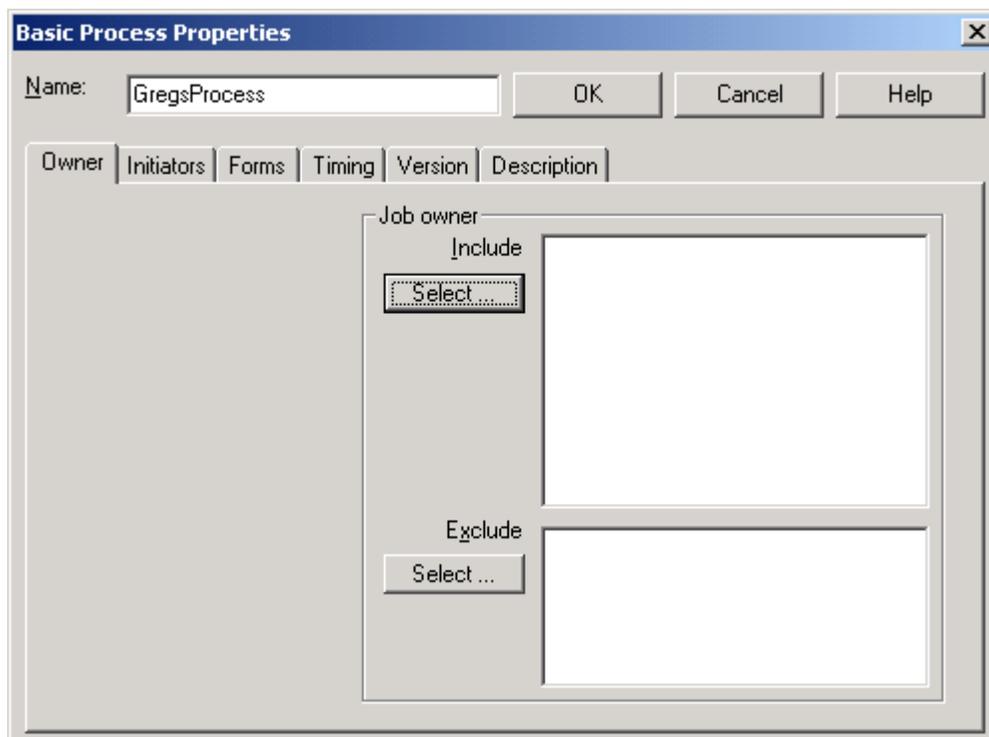


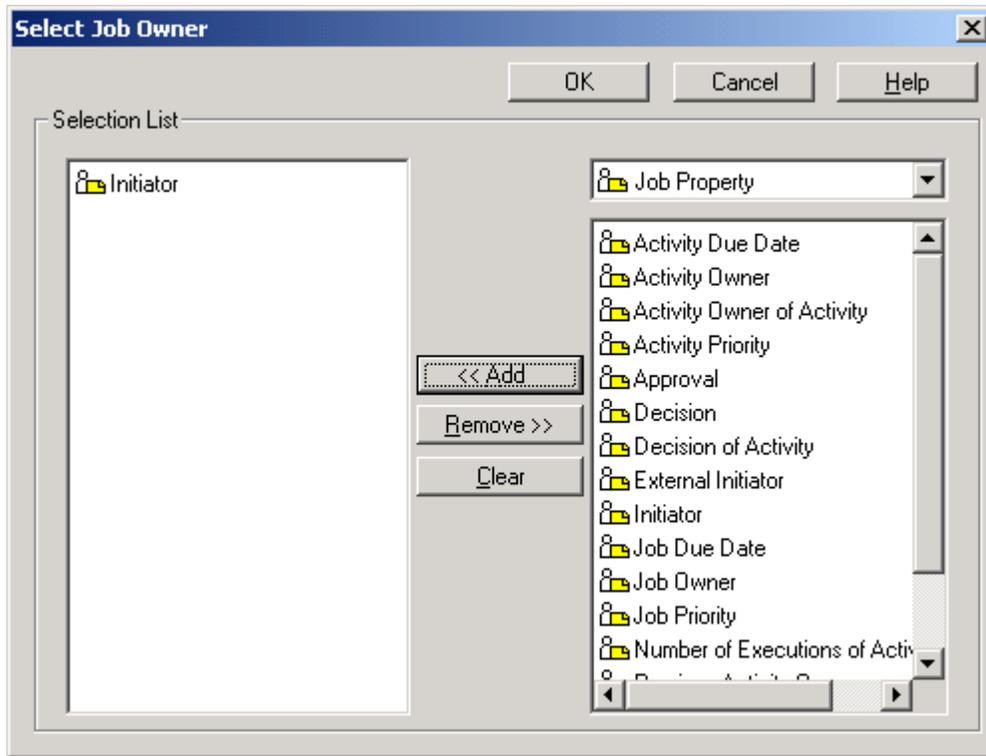
Click **OK**.

The metadata for the last activity is WCM.Publish and indicates which server the change is published to.

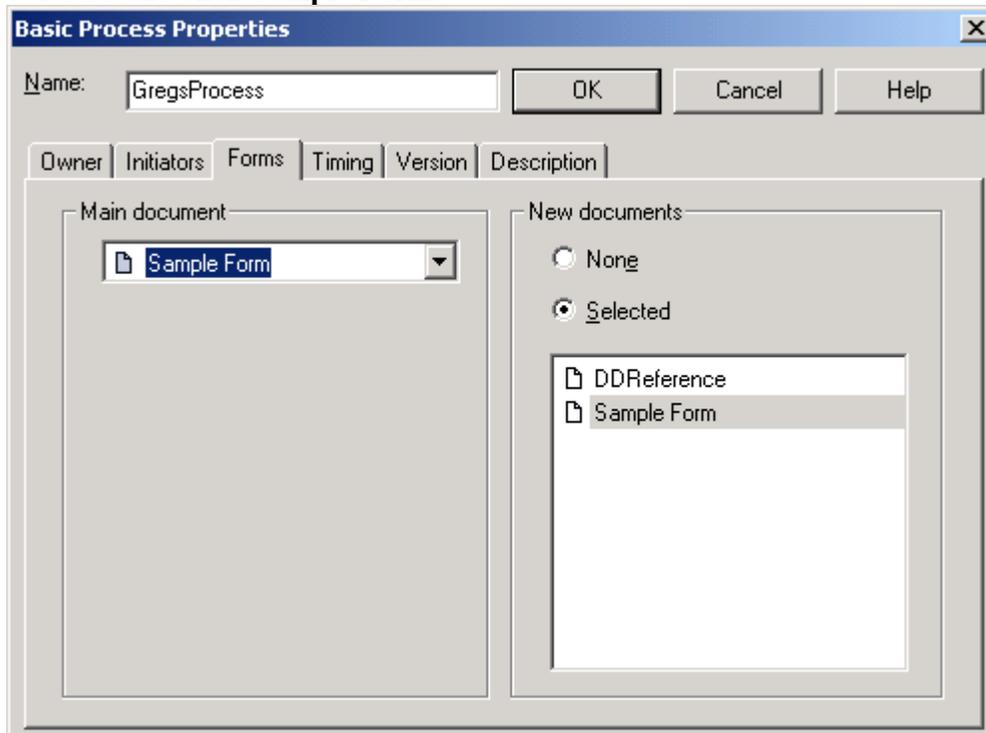


At this point, the process definition is nearly complete. Now you must choose a Job owner for the process. Select **Process->Basic Properties** from the toolbar. On the **Owner** tab, click **Select**, then add Initiator as the owner.

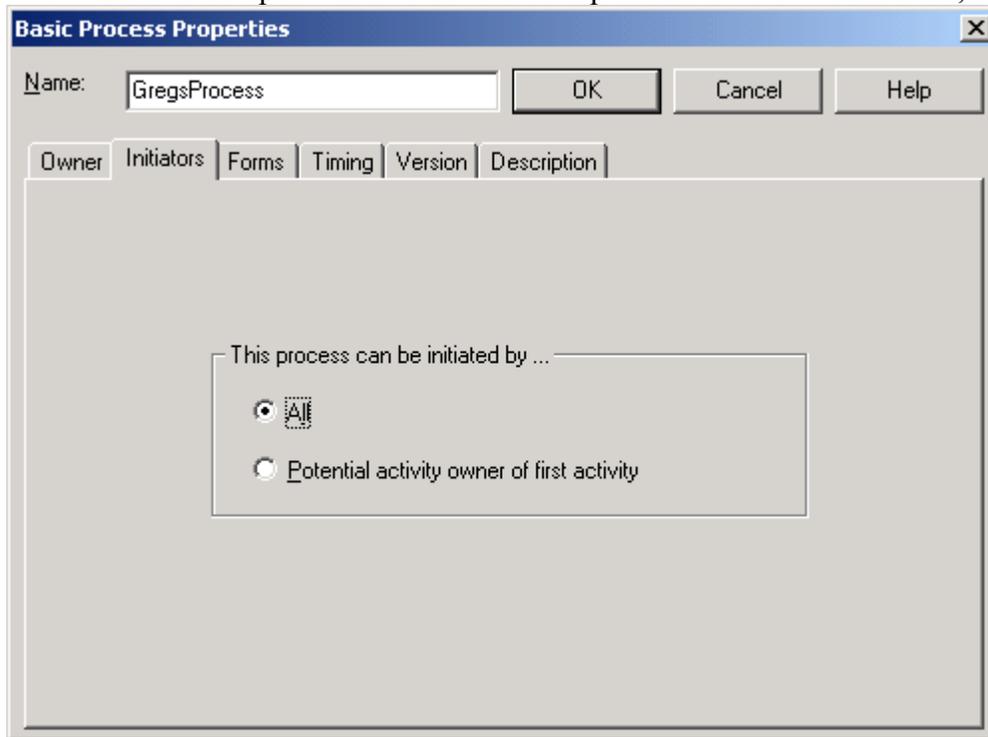




Click the **Forms** tab and select **Sample Form** as the main document. Under New documents, select **Selected** and click **Sample Form**.



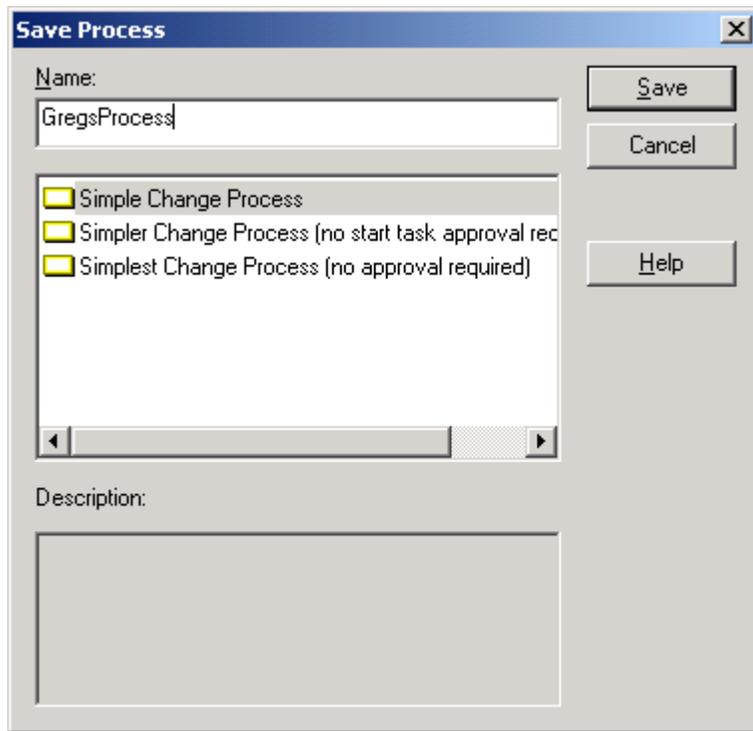
The **Initiators** tab specifies who can start the process. On the Initiators tab, select **All**.



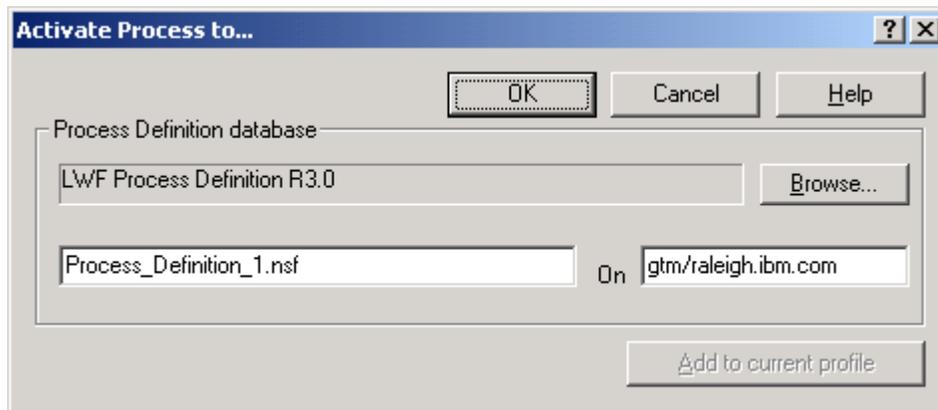
Click **OK**.

Now the process can be saved and activated.

To save the process, select **File->Save** and name the process.

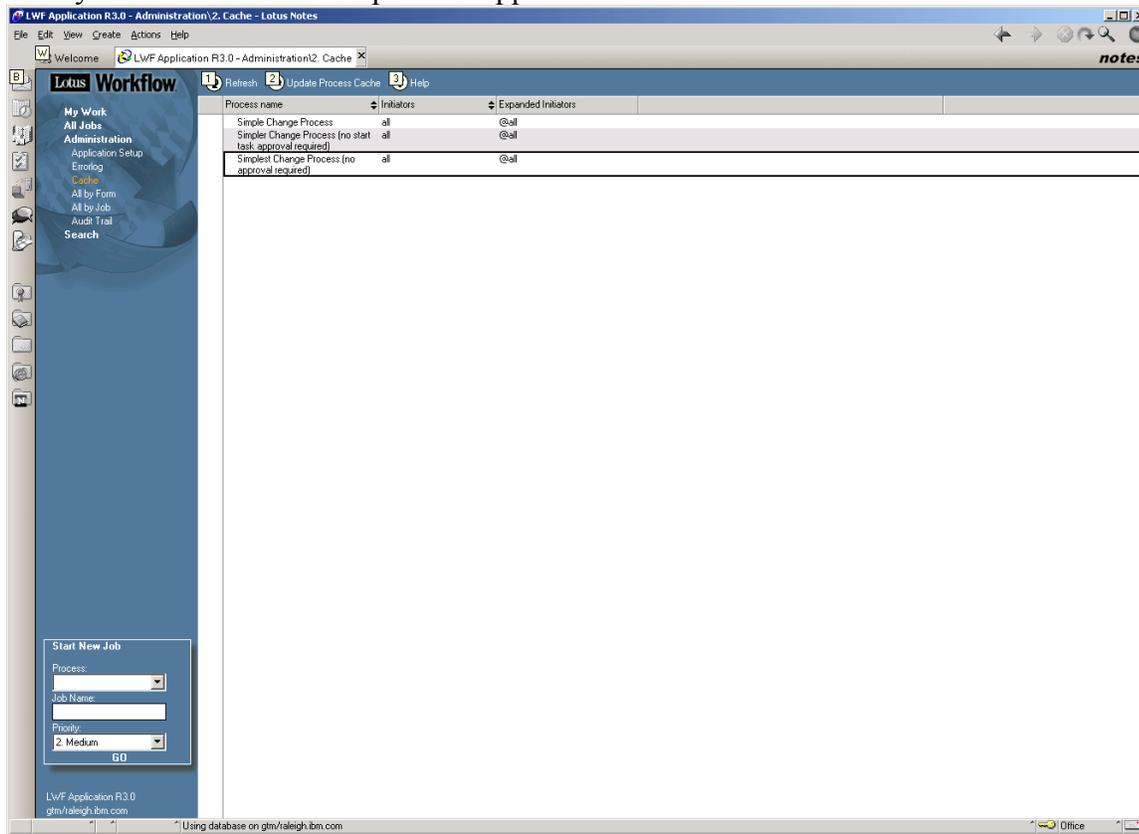


Select **File->Activate**.

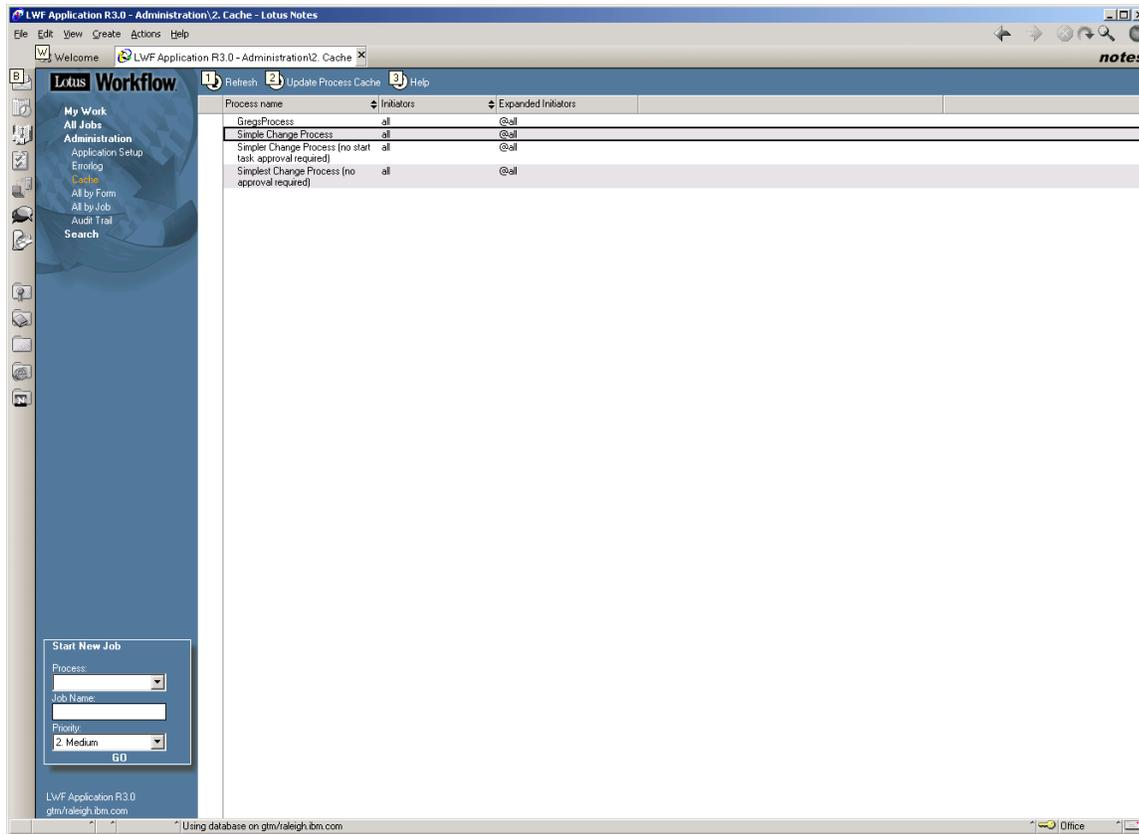


Click **OK**.

Start your Notes client and open the Application database.



Click **Update Process Cache**. Then close and reopen the database to see the new process defined.



Now the process is available for use in WCP. To test your new process, start the WCP UI and choose **New Job**.

The screenshot shows a web browser window titled "Initiate New Job - greg - Microsoft Internet Explorer". The page content is a form with the following fields:

- Name of the Job:** A text input field containing "GregorysNewJob" with an asterisk (*) to its right.
- Job description:** A text area containing "This is a test".
- Process for new Job:** A dropdown menu with "GregsProcess" selected. The dropdown list is open, showing options: "GregsProcess", "Simple Change Process", "Simpler Change Process (no start task approval required)", and "Simplest Change Process (no approval required)".
- Edition:** A dropdown menu with "base" selected.
- Priority:** A dropdown menu with "2. Medium" selected.

At the bottom right of the form are two buttons: "Start" and "Cancel".

Click **Start**, to instantiate your new process. WCP will create tasks for each activity and make them available to users in the appropriate role. As each task is completed, WCP creates a task for the next activity and displays it in the **I could own** folder for the next user.

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