

# Administrator Actions in the Vignette Portal

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This document describes Administrator actions that impact publishing on the Portal:

Content Review	Recommendation Review	Page Publish	Resolve Escalation
Delete Review	Page Publish Review	Unpublish Review	

For each possible action we discuss how the request is usually triggered, how to perform the action properly, and how to avoid unintended consequences of user-generated requests.

For information on how to publish a portlet, or publish content within a portlet, see *Administrator Page Design Actions in the Vignette Portal*.

## Portal Page Content Flags

Our customization of Vignette provides authors with several icons, to help them keep track of their content's status:

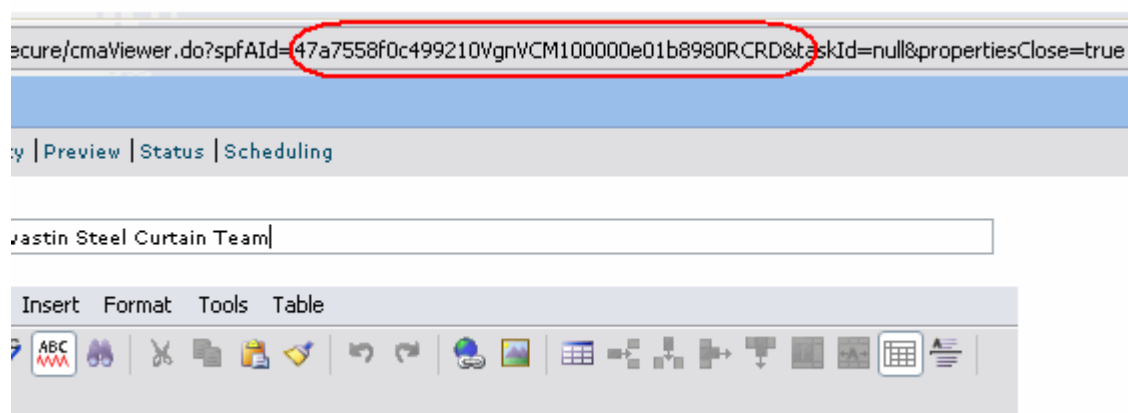
Status Indicator	Meaning
Blue box	Content is new, and has not yet been approved for publication
Green hexagon	Content is modified (has been published before), but the modification has not yet been approved for publication
Yellow star	Content intended for cross-publication in more than one portal page, and needs to be approved by a user who is an approver of the other page
Orange triangle	Content has expired (is no longer published), but has not been deleted

Vignette tracks all content items by ID, not by the name given to them by the creators! Therefore, the names of content objects are not unique across all Vignette portals. Worse: unless the authors apply name versioning standards to updated objects, it is possible to have literally tens of objects that named the same thing, such as "Calendar".

This makes it easy for an unwary Administrator to perform an action on an incorrect item.

### To make sure you have the correct object when handling VCM tasks:

1. Click **View Properties** on the task details. Vignette displays an edit screen.
2. Check the content ID of the item that needs to be acted upon



3. At the Administration Console, search for the object by ID.
4. Use **View Properties > Preview** to double-check the object.

## Content Review

Content review tasks are requests to approve content for publishing. These requests are made by authors who are not also approvers of their own pages.

(In the early days of the Portal, the thought was that some authors should be “managers” of the content, and others should just be “contributors”. This model has fallen by the wayside now. Mostly, authors are approvers of their own content.)

We get Content Review requests because Administrators are always automatically included in the approval groups for the various portal pages. This is strictly as a convenience, in case we need to take action in an emergency!

**Normally we should not approve content reviews; we should leave the approvals to the ‘real’ members of the approval groups for each portal page.** However, watch these tasks closely, to see if the appropriate people in the approval group are taking action! If a week goes by and no one has approved the content, write to the other approvers of that content and urge them to approve or reject the request. Failure to do this will cause an Escalation.



## Delete Review

Delete review tasks are requests to eliminate content from the portal. Normally things that authors request to delete are items that they no longer need, or that they created erroneously. Since authors cannot delete their own content, we must do it for them.

**NOTE:** *If the content to be deleted has ever been published, it is very important to unpublish the content before deleting it. Failure to unpublish content before deleting it can cause nasty errors on the portal page.*

One of the problems with Delete Reviews is that (as previously noted) sometimes an author can have several copies of an item, all with the same name. When checking the Administration Console to confirm that you have the correct object, always select the content item whose time stamp is the closest to the time of the Delete Review request.

For example, in a case where you find newAnnouncement copy #1 (saved at 11:12) and newAnnouncement copy #2 (saved at 11:17), and the Delete Review request is time-stamped 11:21, you probably want to delete the version of newAnnouncement saved at 11:17.

If you are ever unsure of which version of an object you should delete, contact the author immediately!

### Strategy:

1. Read the Delete Review request very carefully. Make a note of the name of the person who last modified the item to be deleted, and what time and date they last modified that item.
2. Copy the name of the item to be deleted, and search for it in the Vignette Content directory.
3. When you find content with the exact name and time stamp you seek, check the box to the left of the content item, then click the red "X" at the top of the Vignette window, to Delete the item. (Note: Vignette asks you to confirm that you really, truly want to delete the item. Click OK.)
4. Return to the original Delete Review request. Open it again. Since you have just deleted the content, the Delete Review request **should** now read "This workflow does not contain content."
5. Approve the request.

### Exceptions

Sometimes an author will submit more than one Delete Review request for the same piece of content. Usually this happens when the author thinks that their request did not go through, and clicks the Delete button again.

If you get more than one Delete Review for the same piece of content, and you have already deleted that content once, reject the other Delete Review requests!

**NOTE:** *If you get more than one Delete Review request, upon opening those requests you may not see the sentence “This workflow does not contain content.” You can safely ignore this warning.*

## Recommendation Review

Recommendation Review tasks are poorly-named. They should really be called Cross-department Publish Requests.

Recommendation Reviews happen in two basic ways:

- The owner of Page A wants to publish some content on Page B. (Requires the permission of the owner of Page B.)
- The owner of Page A wants to publish some content FROM Page B, on Page A. (Requires the permission of the owner of Page B.)

In both cases, the interaction should ONLY include people from the Page B Approver Group and the owner of Page A. Administrators should not involve themselves with recommendation reviews, unless the task remains in the Vignette queue for more than five business days. If the task remains longer than five business days, you should contact the members of the approval group, to urge them to take action.

**NOTE:** *Due to a bug in the Portal software, there are sometimes cases where an Announcement is created that seems to be intended for display on the Commercial Home page, when in reality that was not the author’s intention at all. Keep a careful watch on any Recommendation Reviews that seem to be intended for Commercial/Home, and request guidance from the authors involved, and from the Commercial Home page approvers, when needed.*

## Page Publish Review

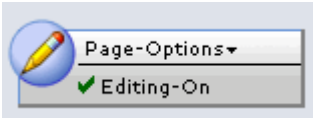
A page publish review is a request to publish a page, submitted by an author who is not the owner of the page. Because they are not the owner of the page, even if they are approvers, they cannot approve the submission of such a page. It is up to the owner of the page, or an administrators, to approve a page publish review.

For detailed information on how pages get published, see the following section.

## Page Publish

Authors can publish the contents of a portlet (as long as the changes are small, and do not affect the overall properties of that portlet), individual portlets (if they are approvers of their own page), links, lists of links, articles, documents, calendars, and blog entries, without any assistance from a Portal Administrator. Once a change is made to the properties of a portlet or the properties of a page, an author can only submit their work for approval. Only a Portal Administrator can publish a portlet or a page.

There are three ways to publish a portlet or a page.



## Publishing via the floaty menu

<p><b>a.</b> The user submits a portlet or the the page properties for approval (clicks Submit or Submit Page at the bottom of the menu.</p> <p>A publish task appears in the your Vignette queue.</p> <p><b>b.</b> Accept the publish task in your Vignette queue.</p> <p><b>c.</b> Click Preview to see the proposed change on the page itself. Vignette opens the page.</p>	<p>The screenshot shows the 'Donna's Corner' page properties dialog box. It has tabs for 'General', 'Classifications', 'Channels', 'Versions', 'Security', 'Preview', 'Status', and 'Scheduling'. The 'General' tab is active. Fields include: Title (Donna's Corner), Primary Channel (commercial/Home/Departments Overview/Genentech Virolog), Render Sub Nav (checkbox), Targeting (Inherited), Secured (checkbox), Is Department? (checkbox), and Role Targeting (radio buttons for 'Do not restrict access' and 'Restrict access'). Buttons at the bottom include Save and Close, Save, Submit, Unpublish, Delete, Cancel, and Help.</p>
<p><b>d.</b> Mouse over the floaty menu at the lower left-hand corner of the page. The floaty menu expands, including a couple of functions the user never sees.</p> <p>If there are still blue squares, green hexagons, or yellow stars visible on the page, <b>Clear Management Cache</b>. The blue squares, green hexagons or yellow stars should disappear.</p> <p><b>e.</b> Return to the floaty menu and click <b>Publish</b>.</p> <p><b>f.</b> Click <b>Clear Management Cache</b>.</p>	<p>The screenshot shows a 'Page View' floaty menu with the following options: Edit Page..., Copy Page, Paste Page, Open Template..., Publish..., Approve, Start Workflow..., Clear Management Cache, and Clear Delivery Cache. Under 'Clear Delivery Cache', there are two radio button options: Page Scoped Regions and All Regions.</p>

**g.** If desired (for a rush delivery only), click **Clear Delivery Cache (all regions)**.

**Check the Delivery Portal to see if all items which should now be published, are visible.**

## Publishing via the Vignette Console

To publish a page or a portlet directly through the Vignette Console:

1. Navigate to the Project for the content you wish to publish
2. Locate the content
3. Select the content
4. At the top of the window, click **Publish**

## Publishing via the Vignette Queue

To publish a page or portlet via the Vignette Queue:

1. Accept the Publish Task
2. Click Preview in the task description and manipulate the floaty menu  
OR  
Navigate directly to the Project for that page's content, in the Vignette Console.

## Resolve Escalation

Tasks in the Vignette queue are normally escalated when they stay in the queue longer than five days. Normally the kinds of tasks that might "over-stay" their time in your queue are tasks that Administrators watch, waiting for "native" approvers to take action:

- Content Reviews
- Delete Reviews
- Recommendation Reviews

If you open a task that has been escalated, the reason for the escalation will usually be that the time for taking action on the task has been exceeded.

Contact the responsible parties and get them to take action, or else the escalation will work up the chain of command to Bill.

## Unpublish Review

Unpublish reviews happen when users want to delete a piece of content. (Content to be deleted should always be unpublished first, to maintain portal page integrity.) Users cannot delete content without the assistance of an Administrator, but they can take steps to prepare the content for deletion, by unpublishing it.

When a user selects a piece of content and clicks Unpublish, the Vignette workflow alerts an Administrator. The action the Administrator should take, depends on what type of content is being unpublished, and whether or not the user who asked for the Unpublish action, is also an approver.

Item	Circumstances	Administrator action	Request visible on Admin task list?
Content	If the requester is an approver	Not applicable	No
	If the requester is not an approver	Approve	Yes
Portlet	(All cases)	Approve (assume that the requester has a good reason for unpublishing; if you are not sure, ask them if they are going to replace the unpublished material with something new, or if the content is intended to disappear from the portal page)	Yes
Page		Approve (but verify this first! It is very possible that the author clicked Unpublish by mistake)	Yes

**Note:** *If an author seeks to unpublish content from the Portal, and that content is part of a portlet that is currently published on the portal, the portlet or page properties must be explicitly REPUBLISHED after the content is removed (unpublished). Otherwise, the change in content will not become visible on the Delivery portal.*