USING WEBDAV-REFERENCE

FrameMaker supports the Web Distributed Authoring and Versioning (WebDAV) server technology. Using this technology, you can connect to a WebDAV server, download and upload documents, lock documents so others cannot work on them at the same time as you do, and add (upload) additional documents to your server.

Use a WebDAV server to work in a collaborative environment without worrying about version control. WebDav manages files so that documents will be not be accidentally overwritten, or updated, or lost.

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Managing Files Using WebDAV (Windows and Mac OS)

How Does WebDAV Work?

WebDAV technology enables you to read and write over an http protocol. Files reside on the server within a directory structure and are "checked out" to your local machine. Your local machine can have a directory structure that mirrors the WebDAV server structure, so when you check out files, the files are downloaded to your machine and placed in the mirrored folder; or you may specify a folder on your local machine to use.

When a file is checked out, it is automatically assigned a Web address (URL). This URL contains information about the location of the file within the directory structure and is used to track and access the file. Hence, you use links to manage your documents.

Why WebDAV?

WebDAV offers two distinct advantages over traditional servers.

Workgroup Management: When a file is managed by a WebDAV server, multiple authors can download copies of the file, but only one author at a time can actually check out the file. The author who checks out the file can share his or her work with other authors by updating the file on the server; however, other authors can't make changes to the managed file until it is checked in and is therefore available for someone else to check out. When you open or attempt to check out a file already checked out by another author, you will see that you actually looking at a read-only version of the file.

This check out/check in system allows multiple authors to access the same file but prevents authors from overwriting each other's work. This version control process of passing documents from one collaborator to another is called *workgroup management*.

Remote File Management: Because WebDAV works over the Web, location doesn't matter. Team members can share files regardless of their proximity.

Managed documents are defined as FrameMaker documents and book files. *Links* are files, graphics, and hypertext links within the document or book file.

Getting Started with Workgroup Management

To use the workgroup management features in FrameMaker, you (1) must be able to connect to a WebDAV server. Once connected, you (2) must specify a URL for each document. This is all you need to manage your workgroup and successfully use WebDAV. For more information about WebDAV, check out *www.webdav.org*.



WebDAV Server Requirements

Different WebDAV servers have different authentication requirements. Some servers require you to enter a user name and password for every transaction; others require authentication only the first time you check out a managed document.

- When the Authentication dialog box appears, you would enter your user name and password, and click **OK**.
- When adding a new server to the workgroup environment, you will need to

 provide a unique server nickname [will appear in the Workgroup Servers list],
 a URL for the server [e.g. *http://training.aptsolutions.com/ webdav/FM/*],
 and (3) the local directory the server directory will map to— this is the example used for the exercises in this chapter.



Firewall software can interfere with the process of connecting to a WebDAV server. Check with your system administrator, or refer to your firewall software documentation for information about setting options to access outside servers.

Setting Up the Server for Use With FrameMaker on Your Local Machine

The following discussion uses an example scenario; in your own environment, you would use your own server nickname, path names and file names.

- Choose File > Workgroup > Workgroup Servers to display the Workgroup Servers dialog box.
 - Once you have set up one or more servers, you can select a current server listed in the dialog box to edit settings for that server.



- 2. Click the New Server button to display the Server Setup dialog box.
- 3. Type in **apt** as the Server Nickname.
- 4. Type in *http://training.aptsolutions.com/webdav/FM*/as the server URL (the last slash is important).
 - If a user name and password are required for this exercise, the instructor will provide that information, otherwise leave those fields empty.



 User name and password entries are optional when setting up a server. However, when you upload and download files, you will need to enter a name and password if your workgroup environment requires it.

Server Setup		x
Server Nickname:	apt	
Server URL:	http://training.aptsolutions.com/webda	
User Name:		
Password:		
Workgroup Fles Lo	cation	
C:\Program Files'	Adobe\FrameMaker7.0	
		Choose
		Cancel OK

- 5. Click the **Choose** button to display the directory listing, then find and select C: | < foldername > | < subfoldername > as the folder in which you want to store local copies of managed documents. Click**OK**to accept the folder location.
 - The path you choose here is used for all servers that you want to add. Changing this path does not change the location of files on existing servers.

Server Setup		x
Server Nickname:	apt	
Server JRL:	http://training.aptsolutions.com/webda	
User Name:		
Password:		
Workgroup Files Lo	cation	
C:\fmexers		
		Choose
		Cancel OK

- 6. Click **OK** to save the server information.
- 7. Click **Done** to close the Workgroup Server dialog box.

Setting Workgroup Preferences for Managed Documents and Their Links

If Workgroup Preferences are set to download all links—when you open a book file, all the files in the book and all the links in each file will also be downloaded. If your Preferences are set not to download links, you'll have to manually download each file and it's links.



1. Choose **File> Preferences> Workgroup** to display the Workgroup Preferences dialog box (the sample below is of the default settings).

Check out from server	Workgroup Preferences	X			
Always automatically checks out the document when you open it.	Enable Workgroup functionality				
Ask displays a dialog box when you open a document that is checked in.	Check out irom server:				
<i>Never</i> opens the local copy of the document without displaying a dialog box and without checking it out.	Update from server: Always When managing links Update non-hypertext links when the document is opened: Ask				
Update from server	Update hypertext links when the document is opened:				
Always automatically downloads the latest version of the document from the server.	Check in links when checking in document:				
Ask displays a dialog box if the document has been updated on the server.					
<i>Never</i> opens the local copy of the document without displaying a dialog box and without downloading the latest version of the document from the server.	Update hypertext links…				
Update non-hypertext links	Always automatically updates hypertext links when you open a document.				
Always automatically updates links when you open a document.	Ask displays a dialog box when you open a document that conta hypertext links.	ains			
Ask displays a dialog box when you open a document that contains managed links.	<i>Never</i> opens the local copy of the document without displaying dialog box and without updating hypertext links.	g a			
<i>Never</i> opens the local copy of the document without displaying a dialog box and without	Note: If <i>Always</i> or <i>Ask</i> is selected, every link in an index or table of contents file will open. If large, the file may open very slowly.				
updating links.	—Check in links…				
	Always automatically checks in links when you check in a document.				
	Ask displays a dialog box when you check in a document that contains links.				
	<i>Never</i> does not check in the linked files when you check in a document.				

- 2. For this class, change all the options to Always.
- 3. Click **OK** to apply the changes and dismiss the dialog box.



If you are not using WebDAV and want to turn off the WebDAV functionality for FrameMaker on your computer: Choose **File > Preferences > Workgroup**, then uncheck the *Enable Workgroup Functionality* option, and click **OK**. The WebDAV options will not appear under the File menu until you turn on the functionality again.



Adding Documents to the Server

After you've setup your WebDAV server, you can add or download a document to begin your workflow.

If you want to separate documents by project, you can do so by creating new folders on the server. You are able to create a new folder during either a **Save As** or **Put File on Server** action.

Creating a New Folder and Adding a Document to the Server

- 1. Open *<filename.fm>*.
- 2. Choose File > Workgroup > Save As to open the Save To Server dialog box.
 - You can use *Save As* for a currently open and active document or you can use *Put File on Server* to first select a closed document (or other file type) from the directory—either choice will then display the same dialog box.
- 3. In the Name column, highlight the **server nickname** you created (to indicate where you want to place the file).

	Save To Se	rver		x
	Brow	vse: Favorite Servers	•	Open
	Name	Checked C)ut Size	Cancel
Highlight the server nickname you created.				New Folder
	, Name:	garcen.fm		
		🔲 Keep Checked Out		

- 4. Click **Open** button to connect to the server.
 - The New Folder button will now be active and all files/folders on that server will be displayed. The selected server will now appear in the Browse menu.





- 5. Click the New Folder button to display the New Folder dialog box.
- 6. Type in your **first name** as the folder name (the sample for this exercise uses **Training** as the folder name), and click **Create**.



• Your new folder will now be listed in the Save To Server dialog box.

Your new folder will now be listed and will be available for other files to be added in the future. You can tell which item is a folder because instead of a file size, you will only see a dotted line in the Size column. Browse: apt Checked Out Size ChapAPT_tpl.fm DataSubmission.fm		Save To Server			×
	Your new folder will now be listed and will be available for other files to be added in the future. You can tell which item is a folder because instead of a file size, you will only see a dotted line in the Size column.	Browse: apt Name allohak.pcx ChapAPT_tpl.fm DataSubmission.fm DataSubmission.fm DataSubmission.2.fm Tomal Report - Lab 2.fm manuals Templates.fm Training Name: garcen.fm Keep C	Checked Out ×	Size 19 K 505 K 1537 K 865 K 44 K 2235 K	Open Cancel New Folder

- 7. With your new folder highlighted, click the **Open** button to open the folder.
 - At this point, you can change the *filename* if desired, select the *Format* if necessary, and turn off the *Keep Checked Out* option if you do not want the file to be automatically checked out after uploading to the server.
- 8. For this exercise, make sure the Keep Checked Out option is unchecked.



Save To Server			×
Browse: Name	Training 📃	Size	Save
			New Folder
Name: garo	en.fm		
	Keep Checked Out		

- 9. Now, click **Save** to save *<filename.fm>* to the server.
 - You will see several messages telling you that the file will be copied to the server and to your folder—your document is uploaded to the server and is now a managed document.
- 10. Close the currently open (local) copy of *<filename.fm>*.

Opening and Checking Out Managed Documents From WebDAV

To begin modifying a managed document, you will either need to download it to your local machine and then check it out—or open it and have it checked out automatically depending on your preference settings.

You can use either the *Open* or *Get File From Server* action, but generally, you will use *Open* for a FrameMaker document and *Get* for a non-FrameMaker file (e.g., an image or PDF file) that has been posted to the server.

1. Choose **File > Workgroup > Open** to display the Open From Server dialog box.

Open From Server			×
Browse: Favo	orite Servers 💌		
Name	Checked Out	Size	
apt			Open
			Cancel

- 2. Choose the server nickname (e.g., *apt*), and click **Open**.
- 3. As instructed to do, select another student's folder, and click **Open**.



- 4. Select *<filename.fm>*, and click **Open**.
 - The document is downloaded to your local machine, placed in a mirrored folder, and opened in FrameMaker.
 - Each local machine has a directory structure that mirrors the WebDAV server structure (created when the server was set up).





Depending on your Workgroup Preferences settings, FrameMaker may download all the linked files automatically or ask if you want the linked files downloaded.

Holding down Shift before clicking on the Open button will let you download all files in the folder at one time.

Because of the Preference settings you made earlier, the file was checked out when you opened it—to see that is marked as checked out, choose File > Workgroup > Open again, then when the Open From Server dialog box is displayed, notice the asterisk in the Checked Out column.



6. Dismiss the Open From Server dialog box.



Editing a Managed Document

You edit a managed document exactly as you would any FrameMaker document.

Checking Documents Into the WebDAV Server

While a managed document is checked out, you can still save editing changes made to it back to the server. This allows other authors you to see your work without you giving up your lock on the document. Then when you're finished with the document, check it in to update your changes to the server and release your lock on the managed document.

- If preferences are not set to automatically check a document out when you open it, you can choose File > Workgroup > Check Out at any later time.
 - To check multiple documents out, hold down the Shift key and choose File > Workgroup > Check Out All Open Documents. Each open document will be checked out and downloaded to your local hard drive.
- To cancel a check out, choose File > Workgroup > Cancel Check Out.
 You'll be prompted to verify that you want to cancel the check out.
 - To cancel check out of multiple documents, hold down the Shift key and choose File > Workgroup > Cancel Check Out of Open Documents.
- 1. For your *<filename.fm>* document, choose **File > Workgroup > Check In**.
 - The file is saved to the server, the lock release is removed, and your local version will be locked and uneditable.
 - Now someone else will be able to check the file out.



To check in multiple documents, hold down the **Shift** key and choose **File > Workgroup > Check In All Open Documents**. All open documents that are checked out will be checked in.



Once you save or update a file to the server you cannot roll back to a previous version.



Other Options—Overview

Action	Process
Saving a Managed	When saving, you can save to your hard drive or to the WebDAV server.
Document	1. To save a managed document to your hard drive, choose File > Save .
	2. To save a managed document to a WebDAV server, do one of the following:
	 Choose File > Workgroup > Save.
	 Choose File > Workgroup > Save As to save your managed document to a different location.
	 The Save As command will remove the management information from the document regardless of whether the document is being saved to a location in a managed folder or not.
Updating All Open Documents	While you have a document checked out, you can update changes to the managed document on the server. This allows you to share your work with other authors without giving up your lock on the document. Choose either:
	♦ File > Workgroup > Update.
	 File > Workgroup > Update All Open Documents.
Reverting to Server Version	While you have a document checked out, you can roll back to the server version. This allows you to discard all changes made to your local file and replace it with the most current server version. Choose either:
	• To revert an open document, choose File > Workgroup > Revert.
	 To revert all open documents, hold down the Shift key and choose File > Workgroup > Revert All Open Documents.
Accessing and Adding Other Files on a WebDAV Server	You can download files from the WebDAV server that FrameMaker cannot open or import. You can also add such files to the server from FrameMaker. If you download a file that already exists at the download location, FrameMaker will update it with the latest version from the server.
	1. <u>To download a file from the WebDAV server</u> , choose File > Get File from Server .
	2. Select a server, a directory, and the file you want to download—then click Open .
	• <u>Note</u> : If you have a version of this on your local hard drive, you'll be prompted to overwrite the file.
	1. <u>To add a file to the WebDAV server</u> , choose File > Put File on Server .
	2. Select the file you want to upload along with the server, and click Save .



Action	Process
Importing a File From a Server	You can import a file directly from any server and add it to your Workgroup. To import a file from the server:
	1. Choose File > Workgroup > Import.
	2. In the Import from Server dialog box, select the server and file that you want to import.
	3. Select whether to <i>Import by Reference</i> or <i>Copy into Document</i> , and click Import .
	• The file will be downloaded to your managed files folder, if there is a copy already in the managed file folder, you'll be prompted to overwrite it.

Managing Document Links—Discussion

The WebDAV Links palette contains information both for local links (located on your hard disk) and for managed links (those located on a server). Links represent paths to your managed documents. The Links palette is where you add, update, and save all your links and get information about your managed document and selected links.

There are three key items within the managed links palette:

- *Document URL* displays the URL for your active document.
- *Selection URL* which displays links to all files external to FrameMaker (for example: *.gifs*, *.jpegs*, and *.bmps*).
- Selection Status displays the state of the selected URL (for example: *Checked In, Checked Out, or Locked*).

WebDAVLinks	×
Links	
Document URL:	
[apt]/Training/garden.fm	
Selection URL:	
Document Status: Checked Out	66 B\$



Managing Document Links—Discussion

- Choose **File > Links** to open the Links palette.
- Select the link(s) you want to add.
 - This can be an imported graphic in a FM document, or a file in the book file.
- Choose one of the following:
 - Save Link As...
 - Save Selected Links As...
 - Save All Links As...
- When you are prompted for a filename for each link, you can use the default name or enter a different name.
 - All links will be added to the same server and directory.
- Adding All Links to the Server
- Choose **File > Links** to open the Links palette.
- Do not select any links in your document or book.
- Choose Save All Links As, then select the server and directory you wish to save the links to.
- When you are prompted for a filename for each link, you can use the default name or enter a different name.
 - All links will be added to the same server and directory.

Saving Managed Link Updates

- Choose **File > Links** to open the Links palette.
- Select one or more links in the Links palette.
- Choose **Save Link** in the Links palette menu; then specify a location on the WebDAV server.
- Select one or more links in the Links palette.
- Do one of the following:
 - If the link is checked out, choose **Revert Link**.
 - If the link is not checked out, choose Update Link.
- Specify a location on the WebDAV server, and click **OK**.



Updating or Revert Managed Links to the Latest Version on the Server

Adding and Saving Selected Links to the Server

Managing Document Links—Discussion

Checking In	• Select File > Links to open the links palette
Managed Links to	 Solect the link(s) you want t shock in
the Server	Select the link(s) you want t check in.
	• Select one of the following:
	– Check In Link
	 Check In Selected Links
	 Check In All Managed Links
Checking Out	• Select File > Links to open the links palette.
Managed Links to the Server	• Select the link(s) you want to check out.
	• Select one of the following:
	 Check out Link
	 Check Out Selected Links
	 Check Out all Managed Links
Canceling Check	• Select File > Links to open the links palette.
Out Managed Links	• Select the link(s) you want to cancel check out.
	• Select one of the following:
	 Cancel Link Check Out
	- Cancel Check Out of Selected Links
	- Cancel Check Out All Managed Links
Reverting	• Select one or more links in your document or book.
Managed Links to	• Do one of the following:
on the Server	 Choose Revert Link
	 Revert Links
	 Revert All Links
Updating Managed	• Select one or more links in your document or book
Links to the Latest	 Do one of the following:
Version on the	 Choose Undate Link
Server	- Undata Links
	– Update All Links