(a)Chapter 2

(b)Tutorial: Small Team Site Building

Think you're a Sitespring expert? You probably are! It's not that difficult to learn Sitespring's feature set[md]for the most part, it has a very intuitive user interface. It's harder, however, to put all these features together in a usable workflow that supports your web production process.

Teaching you how to put the features together is the purpose of this chapter. What follows is the first of two tutorials on using Sitespring to support your methodology. In this first tutorial, we're going to work from the perspective of a small web design team and show you how to use Sitespring to develop a web site for a client.

During the course of the tutorial, we show you how to:

******BEGIN BULLETED LIST***

[lb] Create a client organization and users

[lb] Create a project with multiple tasks

[lb] Complete tasks assigned to different users

[lb] Share files among internal team members

[lb] Create a project site and publish information

[lb] Review files and get approvals from the client

[lb] Backup and import your Sitespring data

******END BULLETED LIST***

Although the process used in this tutorial is somewhat simplified from what you might use in a real-world scenario, I can assure you that you will learn the basics of applying Sitespring to your own web production process.

In Chapter 3, "Tutorial: Large Team Application Development," you build on the core concepts presented in this chapter as you learn from the perspective of a large web application development group.

Note that we assume you already have Sitespring installed and setup at this point. If you need to install Sitespring, refer to the Sitespring manual or jump ahead to Chapter 18, "Custom Installations," for instructions on how to install and configure the software.

(c)Here's the Scenario

You're name is Wendy. You're a web producer for a company called Lake Tahoe Web Design. When you're not waist-deep in fresh powder, you're part of a small web design team that consists of a graphic designer named Debbie and a shadowy figure named Sitespring Administrator.

Chris is the director of marketing for Sirius Snowboards. He's given you their brochure-ware and asked you to design a web site to showcase his company's products for the upcoming ski season. His company wants to launch an online version of their 2003 catalog the same day the printed copy is sent out in the mail.

Because the team is small, your role encompasses both project management and actual hands-on Hypertext Markup Language (HTML) production. Your other team members wear multiple hats as well. See Table 2.1 for the usernames, passwords, and roles of the users in this tutorial.

Table 2.1[em]Tutorial User Information

Full Name	**User Name**	**Password**	**Type**	**Role**
Wendy the Web Producer	wendy	wendy	Team member	Web producer for the team, handling all project management and HTML construction
Debbie the Designer	debbie	debbie	Team member	Graphic designer for the team, handling all user interaction, design, and page mockups
Sitespring Administrator	admin	admin	Admin	Administrator of the Sitespring software

				software
Chris the Client	chris	chris	Client user	Your client, for whom you're doing all the work

BEGIN NOTE

[ic]Note

When we refer to the above users in the text of the tutorial, we'll reference them by their first name, such as “Wendy”. However, when we direct you to login as those users, you'll want to login with their username, such as “wendy”. Note that usernames and passwords are case-sensitive, so if you try to login with a username of “Wendy” (note the capital “W”) you will get an error because that username does not exist in the tutorial database.

END NOTE

(c)Let's Get Started

Because Sitespring is a multiuser application, you can walk through the scenarios in these tutorials by yourself or with other friends or co-workers. If possible, ask some fellow employees to play the roles of the different users. When you're done, you'll have a better feel for how Sitespring can help team members and clients communicate and collaborate.

BEGIN NOTE

[ic]Note

During the course of the tutorial, you'll see a note whenever there's a switch between users. At each point, make sure you or whomever's playing that user logs in and performs the steps in the tutorial until the next switch.

END NOTE

(d)Importing Data

This tutorial comes with multiple Sitespring database files that you can import into your existing Sitespring installation. A list of these files is shown in Table 2.2.

One database contains the Sitespring data at the start of the tutorial and provides you with the user accounts in Table 2.1. The other databases contain the Sitespring data midway through the tutorial with all the tasks created, and at the end of the tutorial with with the first two tasks completed. You'll notice that each database is listed with an accompanying log file. The log file records the transactions that modify data in the database.

Table 2.2[em]Tutorial Database Files

Database Files	**Description**
application-start.db application-start.log	Data at the start of the tutorial with just the team member user accounts
application-tasks.db application-tasks.log	Data halfway through the tutorial with the client, project, and tasks created
application-finish.db application-finish.log	Data at the end of the tutorial, with a project site created and two tasks completed

******BEGIN CAUTION***

If your installation of Sitespring is radically different from the one used for this tutorial, you might encounter problems importing data. For this tutorial, the Sitespring installation directory is at C:\Program Files\Macromedia\Sitespring and the Sitespring data directory is at E:\SitespringData.

If you installed Sitespring differently, you might need to edit your system configuration from the Administration page to reflect the appropriate file locations.

END CAUTION***

If you don't want to import data at the start of the tutorial, you'll need to manually create the user accounts listed in Table 2.1. Creating user accounts is covered in Chapter 20, "Administering Sitespring." If you're not familiar with importing data, this might actually be the quickest way to get started. However, it's probably a good idea to learn how to back up and import your Sitespring data now[md]it'll save you time later in this tutorial.

If you want to work with Sitespring's email notification features, you'll need to edit the user accounts and change their email addresses to the real email addresses for you and your helpers. Also make sure that your mail server is appropriately configured. Editing user accounts and configuring a mail server also are covered in Chapter 20.

BEGIN NOTE

[ic]Note

The sample data contains user accounts with dummy email addresses. If you don't change these to valid email addresses (such as your own or the email addresses of co-workers helping you with the tutorial), the administrator can expect to receive notifications about this problem from the Sitespring server.

END NOTE

BEGIN NOTE

[ic]Note

Tutorial data is included on the CD-ROM that came with this book and also is available for download from the book's web site. See Appendix B, "What's on the CD-ROM?", for more information on accessing tutorial data from either source.

END NOTE

To import the Sitespring data containing the tutorial's user accounts:

BEGIN NUMBERED LIST

1. Stop the Macromedia Sitespring service. To do this, open the Services administration tool. On Windows 2000, go to the Start menu and select Settings and then Control Panel. Open Administrative Tools, and then open Services. Select the Macromedia Sitespring service. Click the Stop icon on the Services toolbar, and the service should stop.

2. Make a backup copy of your current database. In Windows Explorer, go to the drive where Sitespring is installed and navigate to \Sitespring\db\data. Rename application.db to **application.db.bak**, and rename application.log to **application.log.bak.**

3. Make a backup copy of your global.properties file, which contains the database password. Go to \Sitespring\JRun\lib and rename global.properties to **global.properties.bak.**

4. If you're loading sample data from the CD, load the CD into your drive and go to \Tutorials\Chapter2\Data. Copy the application-start.db file from this directory and paste it into \Sitespring\db\data on your installation drive.

5. Rename application-start.db to **application.db.**

6. Open \Tutorials\Chapter2\Data\password.txt in a text editor and copy the database password, which is frc6r9ztj6kr.

7. Open \Sitespring\JRun\lib\global.properties in a text editor and go to the bottom of the file to the line that starts with "jdbc.sitespringdb.param.password=" (line 370, by default). Paste the password you just copied over the existing password, and save the file.

8. Start the Macromedia Sitespring service. To do this, return to the Services administration tool and select the Macromedia Sitespring service. Click the Play icon on the Services toolbar, and the service should start.

******END NUMBERED LIST***

******BEGIN NOTE***

[ic]Note

To learn more about working with Sitespring's services, see Chapter 21, "Sitespring Under the Hood."

END NOTE***

******BEGIN NOTE***

[ic]Note

You can remove the sample data from your Sitespring installation and restore your original data at any point. Simply stop the Sitespring service, delete the application.db, application.log and global.properties files, and remove the .bak extension from your original files. Then, start the Sitespring service.

END NOTE***

(d)Logging In

Now that you've imported the tutorial data, you should be able to log into the Sitespring application with any of the user names and passwords for team members listed in Table 2.1.

******BEGIN USER CHANGE NOTE***

Team member: Wendy the Web Producer

Username: **wendy**

Password: **wendy**

END USER CHANGE NOTE*

We start the tutorial by logging in as Wendy the Web Producer. To log in as a team member:

*****BEGIN NUMBERED LIST***

1. Open a web browser and enter the URL for the Sitespring team member's login page. If you installed Sitespring with default settings on the same machine on which you're working , the URL would be either http://localhost or http://localhost:8400, depending on the port on which the Sitespring service is running. If you installed Sitespring on another server, the URL would be either http://servername or http://servername:8400.

2. When the login page appears, enter **wendy** for the user name and **wendy** for the password. Click the Login button, and you'll be taken to the user's home page.

3. If this is your first time logging in as this user, you'll get a pop-up welcome window. This is a nice feature for new users, but it will probably become annoying after logging in repeatedly during this tutorial. To avoid this, check the somewhat-hidden Don't show me this welcome movie again check box, as shown in Figure 2.1, and close the window.

*****END NUMBERED LIST***

*****INSERT FIGURE 2.1 02ISS01.TIF ****

Figure 2.1[em]Banishing the Welcome window.

*****BEGIN NOTE***

[ic]Note

Note that client users won't be able to log into the internal team member application. However, both client users and team members can log into project sites, which we cover later on in this tutorial.

END NOTE*

(c)Creating the Client Organization

If you haven't previously worked with your client using Sitespring, the first thing you'll do is create a client organization. Because this is your first project with Sirius Snowboards, you need to add their organization to the list of available clients in Sitespring.

To create a client organization:

******BEGIN STEPS***

1. Click Clients in the Sitespring toolbar.

2. Click the Add icon.

3. On the Add Client page, enter the name of the client: **Sirius Snowboards.** You can optionally add other contact information for the client organization here, including a link to the company's web site. (See Figure 2.2.)

4. When you're finished, click Save.

******END STEPS***

******INSERT FIGURE 2.2 02ISS02.TIF ******

Figure 2.2[EM]Creating a client organization.

******BEGIN NOTE***

[ic]Note

A status message is displayed just below the Sitespring toolbar and breadcrumbs after performing any operation. This message is color-coded. Green means the operation was a success. Red means there was an error, and yellow is for warnings. After adding the client organization, you should see a message in green that reads "Success: Addition succeeded."

******END NOTE***

We next create one client user within the newly created client organization. If you were working with multiple client representatives, you would add them here as well. Luckily, Chris has decided to be your single point of contact, which makes both your jobs easier.

To create a client user:

BEGIN STEPS

1. From the client page for Sirius Snowboards, click the Add icon in the Client Users module.

2. On the Add Client User page, enter **chris** for the user name and **Chris the Client** for the full name. You can optionally add other contact information for the user here, such as title, email, and work phone, all of which would be quite useful in a real-world scenario. Enter **chris** for the Password and Confirm Password fields.

3. After you're finished, click Save.

END STEPS

(c)Creating a Project

Now it's time to create a project in Sitespring. Each project is a collection of tasks, files, and discussions associated with a particular client organization. Because you, as Wendy, have been given project manager permissions, you are able to create and modify projects in Sitespring.

To create a project:

BEGIN STEPS

1. From the client page for Sirius Snowboards, click the Add icon in the Client Projects module.

2. On the Add Project page, enter **Sirius Snowboards Web Site** for the name of the project. Set the priority to High because you need to crank out this site in record time. Enter an optional description of the project, select Wendy for the Owner, and change the project's status to Open because we're starting work on it immediately. (See Figure 2.3.)

3. After you're finished, click Save.

END STEPS

INSERT FIGURE 2.3 02ISS03.TIF ***

Figure 2.3[em]Creating a project.

(d)Adding Team Members

Right now, you're the only team member associated with the project. Unless you plan to do all the work yourself, you'll want to add some more team members.

Note that you're not required to add a team member to a project to assign them tasks, but it's a good idea to add everyone that will be involved. Later, you can publish to the client's project site contact information about those team members who were added to the project.

To add team members:

BEGIN STEPS

1. From the Sirius Snowboards Web Site project page, click the Add icon on the Team module.

2. On the Add Team Members page, click the select-all check box in the very top row of the table. This check box acts as a toggle and automatically selects (or unselects) all the check boxes in the list of team members.

3. Click the Add icon to add the selected users. (See Figure 2.4.)

END STEPS

***INSERT FIGURE 2.4 02ISS04.TIF ***

Figure 2.4[em]Adding team members to a project.

(d)Adding Files

Chris the Client already has sent you the marketing materials for Sirius Snowboards in electronic format. Because all your team members will be accessing Sitespring to keep track of the project's status and to work on tasks, it would be wise to make these files available through Sitespring.

To add files to the project you just created, you first need to save them in a shared folder on the Sitespring server that has file versioning enabled. For this tutorial, we're going to use the default SitespringData shared folder, which is shared as Sitespring. This folder already has directories created within it for your project files and the contents of your project sites.

(e)Mounting a Shared Folder

To access shared files from a remote computer, you typically need to create a connection to that folder from your local computer. This is often referred to as mounting a shared folder, creating a network shortcut, or mapping a share to a drive letter. To mount the default SitespringData shared folder on your local computer:

BEGIN STEPS

1. In Windows Explorer, go to Tools and select Map Network Drive.

2. Choose a drive letter, and then enter the network path to the SitespringData shared folder. By default, this folder is shared as Sitespring, so you'll enter a network path like *Servername*\Sitespring. Check the Reconnect at Logon check box if you plan on working with files in this folder frequently.

END STEPS

BEGIN TIP

[ic]Tip

You don't have to map a shared folder to a drive letter to access files on it. Mapping to a drive just makes the shared folder appear as a local folder, and it's usually easier to access files by going to a drive letter than by entering the full network path. When Sitespring Helper goes to open a file, it does not refer to the mapped drive letter at all; it simply looks for the requested server name and share.

END TIP

BEGIN NOTE

[ic]Note

The tutorial here assumes the Sitespring server and your desktop computer are on the same local network or VPN. If the Sitespring server you're accessing is at a remote location over the Internet, then you would create a web folder instead and specify the Internet address for that server as an IP address or DNS hostname, as opposed to a windows network name as used in the above examples.

END NOTE

(e)Copying Files

You can now copy the files you received from the client into the SitespringData shared folder that you just mounted:

BEGIN STEPS

1. If you're loading sample data from the CD, load the CD into your drive and go to \Tutorials\Chapter2\Docs. Copy the following files: brochure.doc, catalog.doc, faq.doc, and release.doc.

2. Go to the drive to which you mapped the SitespringData shared folder and navigate to \projects.

3. Create a new folder called **SiriusSnowboards.** Within that, create a new folder called **ClientDocs** and paste into it the files you copied.

END STEPS

(e)Adding a Folder

Now that the client's files are in a shared folder that's being versioned by Sitespring, you can add the SiriusSnowboards folder to the Sitespring project page for easy reference and access.

BEGIN NOTE

[ic]Note

You need to have a web browser that supports Macromedia Flash 5 technology to access the Sitespring File Explorer. If the File Explorer fails to appear, you can download version 5 or later of the Flash Player at *www.macromedia.com/go/getflashplayer/.* Note that Flash 5.0 r42 or higher is required for Windows, and Flash 5.0 r41 or higher is required for Mac. Macromedia has posted a technical note on this at http://www.macromedia.com/support/sitespring/ts/documents/flash_player_requirements.htm. This technical note has a link that will allow you to test your installation of Flash for the proper version.

END NOTE**

BEGIN STEPS

1. From the Sirius Snowboards Web Site project page, click the Add icon on the Folders module.

2. On the File Explorer page, make sure that the file Root is set to the \\Servername\Sitespring share into which you placed the files. Click the drop-down menu to the right of Root and select this share, if it's not already selected.

3. Click the plus sign in front of the projects folder to open it and reveal the SiriusSnowboards folder you just created. If you click the plus sign in front of the SiriusSnowboards folder, you see that the ClientDocs folder is within it.

4. Click the check box in front of the SiriusSnowboards folder.

5. Click the Add icon (the large checkmark in the upper-left corner, not the plus sign) to add the selected folder. (See Figure 2.5.)

******END STEPS***

******INSERT FIGURE 2.5 02ISS05.TIF ******

Figure 2.5[em]Adding a folder to a project.

(c)Creating Tasks

Now that you've created a project for context, it's time to start creating tasks and assigning them to team members. A task is basically an action item assigned to a team member or client user. Tasks most likely have due dates, and they might be associated with tangible deliverables, such as documents, artwork, and web pages.

Your first step is to identify the tasks that need to be accomplished to complete this project. Because there's only three people on your team and you all work in the same room of the office (it's got a great view of the Sierras), you've found that a simple ten-step process is more than adequate to produce the type of web sites on which you usually work. The steps of this process are shown in Table 2.3. This table contains a row for each task and show's who it's assigned to, when it's due, the type of task, and what files are involved.

Table 2.3[em]Project Tasks and Files

Number	Task Name	Assigned To	Due Date	Type	File(s)
1	Draft Project Plan	Wendy	10/15/03	Create	ProjectPlar
2	Client Review of Project Plan	Chris	10/17/03	Review	ProjectPlar
3	Build Site Map	Wendy	10/20/03	Create	SiteMap.doc
4	Design Mockups	Debbie	10/22/03	Create	PageMockups

5	Client Review of Site Map and Mockups	Chris	10/24/03	Review	SiteMap.doc PageMockups
6	Process Images	Debbie	10/25/03	Create	Site Images
7	Build HTML	Wendy	10/29/03	Create	Site HTML
8	Populate Content	Wendy	10/31/03	Create	Site Copy
9	Client Review of Site	Chris	11/2/03	Review	Entire Site
10	Launch Site	Wendy	11/5/03	Action	Entire Site

(d)Task 1: Draft Project Plan

In our simplified workflow, the first task is to create a project plan. The project plan will clearly articulate the goals of the site, the scope of the work, the schedule, and the budget. To create this task:

******BEGIN STEPS***

1. From the Sirius Snowboards Web Site project page, click the Add icon on the Tasks module.

2. On the Add Task page, enter **Draft Project Plan** for the name of the task. Enter a description for the task, assign it to yourself (Wendy), and leave the status as Not Started. Set the priority to High, set the due date to **10/15/03**, and enter **8.0** hours for the estimated time.

3. When you're finished, click Save. (See Figure 2.6.)

******END STEPS***

******INSERT FIGURE 2.6 02ISS06.TIF ******

Figure 2.6[em]Adding a task.

(d)Task 2: Review Project Plan

After the project plan is created, you need to have it reviewed and approved by the client. To create this task in advance:

******BEGIN STEPS***

1. From the Sirius Snowboards Web Site project page, click the Add icon on the Tasks module.

2. On the Add Task page, enter **Review Project Plan** for the name of the task. Enter a description for the task, assign it to Chris, and leave the status as Not Started. Set the due date to **10/17/03**.

3. When you're finished, click Save.

END STEPS

(d)Task 3: Build Site Map

After we have approval to move forward, we need to start defining the site. For the purpose of this tutorial, the first step is to build a site map. To create this task in advance:

BEGIN STEPS

1. From the Sirius Snowboards Web Site project page, click the Add icon on the Tasks module.

2. On the Add Task page, enter **Build Site Map** for the name of the task. Enter a description for the task, assign it to yourself (Wendy), and leave the status as Not Started. Set the due date to **10/20/03**.

3. When you're finished, click Save.

END STEPS

(d)Task 4: Design Mockups

The next step in defining the site is creating some page mockups that show the look-and-feel and structure of the major page types. To create this task:

BEGIN STEPS

1. From the Sirius Snowboards Web Site project page, click the Add icon on the Tasks module.

2. On the Add Task page, enter **Design Mockups** for the name of the task. Enter a description for the task, assign it to Debbie, and leave the status as Not Started. Set the due date to **10/22/03**.

3. When you're finished, click Save.

END STEPS

(d)Create or Import Remaining Tasks

Follow the same process to create the remaining tasks detailed in Table 2.3. When you reach the Add Task page, just enter the name of the task and select an owner as specified in the table.

If you prefer, you can swap out your database with one that has these tasks already created. However, if you've made any changes to the user's email addresses or mail server settings, you'll need to redo those changes after importing the database. You'll also need to remove the SiriusSnowboards folder from the project page and add it again from the appropriate share on your system.

To import a database that has all the tasks in Table 2.3, follow the instructions at the beginning of this chapter to import a database, but copy application-tasks.db instead of application-start.db.

(c)Working With Tasks

Now that you've set up the major milestone tasks for the project, it's time to start working! Note that you're not constrained to working only with the tasks that you just created. You can create new tasks and edit or reassign existing tasks at any time.

(d)Task 1: Draft Project Plan

So how do users know about the tasks that have been assigned to them? Well, if your mail server is configured correctly, team members should receive email notifications from Sitespring when a task is assigned. Assigned tasks also show up on the team member's home page under the My Tasks module, as shown in Figure 2.7.

******INSERT FIGURE 2.7 02ISS07.TIF ******

Figure 2.7[em]Projects and tasks on a team member's home page.

By default, tasks are sorted alphabetically by task name, but you can change this and sort on any column. Click Due to sort by due date, which causes Sitespring to list tasks that are due first. Note that Sitespring will save your sort preferences.

In your identity as Wendy, it's clear that the first and most immediate task is to draft a project plan and get it sent out to Chris for review. Clicking this task from your home page reveals that it's due on 10/15, which is in two days, and that it has been estimated to take about eight hours to complete.

Because you're going to start working on this task immediately, you'll want to change the status of the task to Open so that other team members will know you're working on it.

(e)Change Task Status

To change the status of the task to Open:

BEGIN STEPS

1. From the Draft Project Plan task page, click the Edit icon.

2. On the Edit Task page, select Open from the list of Status options.

3. Click Save.

END STEPS

Before you start working on the project plan document, you'll want to make sure it's in a folder controlled by Sitespring versioning. This ensures that all revisions to the file by you and others will be tracked by Sitespring, and thus be easily retrieved. Because you have a project plan template on hand, you'll copy that file into the SiriusSnowboards project folder.

(e)Save File to Project Folder

To save the file to the SirusSnowboards project folder:

BEGIN STEPS

1. If you're loading sample data from the CD, load the CD into your drive and go to \Tutorials\Chapter2\Docs. Copy the projectplan.doc file.

2. Go to the drive to which you mapped the SitespringData shared folder and navigate to \projects\SiriusSnowboards.

3. Create a new folder called **Docs**, and paste into this folder the file you copied.

END STEPS

Now it's time to watch the time and draft your project plan. Luckily, it's not that bad. After about six hours of work, you've completed the document and are ready to close the task. First, however, you decide it's best to get some peer feedback before submitting the document for client review. To do this, you'll attach the file to your current open task and then reassign that task to another team member for review.

(e)Attach File to Task

To attach this file to the Draft Project Plan task:

BEGIN STEPS

1. From the Draft Project Plan task page, click the Add icon in the Linked Content module.

2. On the File Explorer page, the Root folder should now be set to \\Servername\Sitespring\projects\SiriusSnowboards because you earlier attached that folder to the project. Click the drop-down menu to the right of Root and select the SiriusSnowboards folder, if it's not already selected.

3. Click the plus sign in front of the Docs folder to open it and reveal the projectplan.doc file you just created.

4. Click the check box in front of the projectplan.doc file.

5. Click the Link Files icon (the large checkmark in the upper-left corner) to add the selected file.

END STEPS

(e)Add File Comment

To add a comment to this file:

BEGIN STEPS

1. From the Draft Project Plan task page, under the Linked Content module, click projectplan.doc.

2. On the File page for projectplan.doc, click the Edit file details icon.

3. Enter **Standard Project Plan for Sirius Snowboards Web Site** in the Comments field.

4. Click Save.

END STEPS

(e)Edit Time and Reassign Task for Peer Review

Now that the project plan file is attached to the task, you can reassign ownership of the task to Debbie and ask her to review the linked file. You'll also want to note how many hours you've spent on the task so far.

To edit the time spent on the task and reassign ownership:

******BEGIN STEPS***

1. From the Draft Project Plan task page, click the Edit icon.

2. On the Edit Task page, assign the task to Debbie.

3. Enter **2.0** in the Actual Time field.

4. Click Save.

******END STEPS***

After reassigning the task, you'll see a green status message that reads "Success: Modification succeeded. Add an optional Assignment Comment." (See Figure 2.8.) *Assignment Comment* is a link that enables you to enter an instruction to the new owner of the task. These comments are tracked in the *Assignment History module* at the bottom of the task page.

******INSERT FIGURE 2.8 02ISS08.TIF ******

Figure 2.8[em]The easily overlooked Assignment Comment link.

By default, Sitespring enters "Task assigned to Debbie the Designer (debbie)" for the assignment comment. If you don't replace this with a more informative note, it might be difficult for the new owner of the task to understand what you want done[md]they might think they need to create a whole new project plan!

******BEGIN NOTE***

[ic]Note

You only have one chance to enter an assignment comment after assigning a task. Be sure to click the Assignment Comment link in the green status message to enter your comment before clicking anywhere else.

END NOTE***

(e)Add an Assignment Comment

To add an assignment comment:

******BEGIN STEPS***

1. From the Draft Project Plan task page, click the Assignment Comment link in the green status message that appears after reassigning the task.

2. On the Assignment Comment page, enter the following comments: **Debbie, please review this project plan and let me know if you think it's ready for client review..**

3. Click Save.

******END STEPS***

******BEGIN USER CHANGE ICON/NOTE***

Team member: Debbie the Designer

Username: **debbie**

Password: **debbie**

END USER CHANGE ICON/NOTE***

(e)Peer Review of Task

As Debbie, you've just received an email message from the Sitespring server informing you that a new task has been assigned to you. From reading the message, entitled "New task: Draft Project Plan," you can see that it's due on 10/15, is high priority, has a status of Open, and is part of the Sirius Snowboards Web site project. (See Figure 2.9.)

******INSERT FIGURE 2.9 02ISS09.TIF ******

Figure 2.9[EM]Email notification of task assignment.

Unfortunately, the assignment comment and task description are not shown in the email. However, there is a URL link right in the message body that pulls up the task page. Click the link in the email message to pull up the task page. If you're not logged in, you'll be prompted to do so.

By scrolling down the task page to the Assignment History module, you can see the comment from Wendy asking you to review the project plan and give her your feedback. (See Figure 2.10.)

******INSERT FIGURE 2.10 02ISS10.TIF ******

Figure 2.10[em]Viewing a task's assignment history.

That's an easy task! Right above the Assignment History module is the *Linked Content module*, which shows files that have been associated with a task. Within this module you can see a link to the project plan as projectplan.doc. Clicking the projectplan.doc link takes us to the information page for the file, as shown in Figure 2.11.

******INSERT FIGURE 2.11   02ISS11.TIF ******

Figure 2.11[em]Viewing file information.

Under the File module on this page, you can see the full location of the file, by whom it was last modified, when it was last modified, the size of the file, and any comments that were added.

Under the *Revision History module*, you can see how many revisions there were to the file, who edited the file, when the revision occurred, how the file changed in size, and whether the revision was a milestone revision. Milestone revisions occur when the file is first created and before and after the file is saved by a different user.

******BEGIN NOTE***

[ic]Note

The user names in the File and Revision History modules are those of the authenticated users as recognized by the Windows NT or Windows 2000 file systems. Therefore, they might not correspond with the user names in the Sitespring application. These names are in the format of *Domain\User*. If Sitespring is unable to determine the domain or user name, the user is listed as UNKNOWN_DOMAIN\UNKNOWN_USER.

END NOTE***

At this point, all you really want to do is open the latest version of the file. To do this, click the Edit icon in the File module. If Sitespring Helper is installed, it attempts to open this file with whatever application is associated with the .doc extension. Installation of Sitespring Helper is covered in Chapter 18, "Custom Installations."

If you have no application associated with the .doc extension, Sitespring Helper prompts you to select an application, as shown in Figure 2.12. Enter "Microsoft Word Document" as a description for the extension, and browse to locate Microsoft Word or a similar application on your computer. You also can check the Always use system default editor for 'doc' files check box. If you do so, Sitespring Helper launches the associated application for the extension as known by the operating system.

***INSERT FIGURE 2.12   02ISS12.TIF ***

Figure 2.12[em]Choosing an application in Sitespring Helper.

If all goes well, the file should be launched in Microsoft Word or a similar application, and you now can review the latest version of the project plan. After skimming it over, you don't see any glaring errors. This took you about a half hour to do, so you now want to update the actual time spent on this task and assign it back to Wendy.

(e)Edit Time and Reassign Task

To edit the time spent on the task and reassign ownership:

BEGIN STEPS

1. From the Draft Project Plan task page, click the Edit icon.

2. On the Edit Task page, assign the task back to Wendy.

3. Enter **2.5** in the Actual Time field.

4. Click Save.

END STEPS

(e)Add Assignment Comment

To add an assignment comment giving Wendy your feedback:

BEGINS STEPS

1. From the Draft Project Plan task page, click the Assignment Comment link in the green status message that appears after reassigning the task.

2. On the Assignment Comment page, enter the following comments: **Wendy, I looked over the project plan and it looks great! I think it's ready for client review now..**

3. Click Save.

END STEPS

BEGIN USER CHANGE ICON/NOTE

Team member: Wendy the Web Producer

Username: **wendy**

Password: **wendy**

END USER CHANGE ICON/NOTE**

As Wendy, you just received an email message indicating the Draft Project Plan task was assigned back to you. After logging into Sitespring and viewing the task information, you see Debbie's comments and are thrilled! Now it's time to close this task and then create a new task for client review.

(e)Closing the Task

To close the Draft Project Plan task:

*****BEGIN STEPS***

1. From the Draft Project Plan task page, click the Edit icon.

2. On the Edit Task page, select Completed from the list of Status options.

3. Click Save.

*****END STEPS***

After a task is marked Completed, it does not show up under My Tasks on your home page.

(d)Task 2: Client Review of Project Plan

The next task listed on your home page is Build Site Map. As project manager for the Sirius Snowboards Web site, you know that the client needs to review and approve the project plan before any more work occurs.

To let team members know the Client Review of Project Plan task is currently being worked on, you'll change the status of the task to Open. Later, after this client task is published to the project site, a status of Open lets the client users know it's awaiting action on their part.

(e)Change Task Status

To change the status of the task to Open:

*****BEGIN STEPS***

1. From the Client Review of Project Plan task page, click the Edit icon.

2. On the Edit Task page, select Open from the list of Status options.

3. Click Save.

END STEPS

To enable the client to review and approve the project plan as detailed in this task, you need to create a project site and publish this task and the projectplan.doc file to the project site for review.

(e)Create Project Site

To create a project site for the Sirius Snowboards web site project:

BEGIN STEPS

1. From the Sirius Snowboards Web Site project page, click the Create link after Project Site.

2. On the Create Project Site page, select Olympic for the Design Template.

3. Edit the project path so that it reads **SiriusSnowboards**.

4. Click Save. (See Figure 2.13.)

END STEPS

BEGIN TIP

[ic]Tip

By default, the project path is assembled from the client name and project name. The result is a directory and a subdirectory. In our example, the default project path is Sirius_Snowboards/Sirius_Snowboards_Web_Site, which results in a project site URL of http://localhost:8500/Sirius_Snowboards/Sirius_Snowboards_Web_Site. This helps you keep your project sites organized if you're working on many projects for many clients, but it really makes for a long URL. Simplifying the project path to SiriusSnowboards results in a much more digestible URL: http://localhost:8500/SiriusSnowboards.

END TIP***

******INSERT FIGURE 2.13   02ISS13.TIF ******

Figure 2.13[em]Creating a project site.

After creating the project site, you're taken to the Project Site details page. Although all team members can log into any project site, no client users can do so until they are added under the Permitted Client Users module.

(e)Add Permitted Client Users

To add permitted client users to the project site:

****** BEGIN STEPS***

1. From the Sirius Snowboards Web Site project page, click the Add icon in the Permitted Client Users module.

2. On the Grant Permission to View Project Site page, click the check box in front of Chris the Client.

3. Click the Add icon to add the selected user.

****** END STEPS***

Our client should now be able to access the project site. If you open your web browser and go to the project site URL (you'll need to log in with your team member user name and password), you'll see that there is not a lot of information available.

To get information to the project site, you need to publish it. You'll now publish client and team contact information, all the project's tasks, and the projectplan.doc file that we need reviewed by the client.

(e)Publish Client Contact Information

To publish client contact information to the project site:

****** BEGIN STEPS***

1. From the Sirius Snowboards Web Site project page, click the check box in front of Chris the Client in the Permitted Client Users module.

2. Click the Add to Project Site icon to add the selected user.

*** ***END STEPS***

(e)Publish Team Contact Information

To publish team contact information to the Sirius Snowboards web site project site:

*** ***BEGIN STEPS***

1. From the Sirius Snowboards Web Site project page, click the check box in the very top row of the table in the Team module. This check box acts as a toggle and will automatically select all the check boxes in the list of team members.

2. Click the Add to Project Site icon to add the selected users.

*** ***END STEPS***

(e)Publish Tasks

To publish tasks to the Sirius Snowboards web site project site:

*** ***BEGIN STEPS***

1. From the Sirius Snowboards Web Site project page, click the check box in the very top row of the table in the Tasks module. This check box acts as a toggle and will automatically select all the check boxes in the list of tasks.

2. Click the Add to Project Site icon to add the selected tasks.

*** ***END STEPS***

(e)Publish File

To publish a file to the Sirius Snowboards web site project site:

*** ***BEGIN STEPS***

1. From the Sirius Snowboards Web Site project page, click the SirusSnowboards folder in the Folders module.

2. On the File Explorer page, click the plus sign in front of Docs to open that folder.

3. Click the check box in front of projectplan.doc.

4. Click the Publish icon to publish the selected file.

5. On the Publish Files page, select Proposals from the Document List options and enter **Project Plan** for the Text name of link.

6. Click Save.

****** END STEPS***

Great! Now there's a lot more information available when you visit the project site. When Chris the Client logs in, he'll see what tasks are assigned to him and what files are waiting to be reviewed and approved. (See Figure 2.14.) He'll also be able to navigate the project site and see the status of all published team tasks, get contact information for team members, engage in any discussions with the team, and upload a file.

******INSERT FIGURE 2.14 02ISS14.TIF ******

Figure 2.14[em]Project site with client tasks and files for review.

Because client users don't receive automatic email notifications when tasks are assigned to them or documents are published, it's probably a good idea to now send Chris an email letting him know that he has an Open task assigned to him and an associated file for review.

******BEGIN TIP***

[ic]Tip

You might be wondering why we didn't link projectplan.doc to the project plan review task. This would be a great idea if we were assigning a review task to a team member. However, clients only interact with tasks through the project site, and any content linked to a task is not visible in the project site user interface. If you want to associate a file with a review task, the best way to do so is to publish the file separately and make sure the task clearly indicates the file that needs review. See Figure 2.14 for an example of this.

END TIP***

******BEGIN USER CHANGE ICON/NOTE***

Client user: Chris the Client

Username: **chris**

Password: **chris**

END USER CHANGE ICON/NOTE*

(e)Client Login to Project Site

As Chris, you've just received an email from Wendy telling you that the project plan is ready for review and you can access it by logging into the project site.

To log into the client project site:

****** BEGIN STEPS***

1. Open a web browser and enter the URL for the project site as given to you by the project team. For our tutorial, it is http://localhost:8500/SiriusSnowboards or http://servername:8500/SiriusSnowboards. Just be sure to replace servername with the actual name or IP address of the server running Sitespring.

2. When the login screen appears, enter **chris** for the user name and **chris** for password.

3. Click Log In.

****** END STEPS***

On the project site home page (see Figure 2.14), you see that there are three client tasks assigned to you and one file for review. The first client task assigned to you is Client Review of Project Plan. Its status is Open, and it clearly refers to the Project Plan file that is listed under Files For Review.

(e)Reviewing and Approving a File

To review the project plan, simply click the hyperlinked document name and it serves the file to your web browser. If your document types and helper applications are configured correctly, the file should be opened in the appropriate application, such as Microsoft Word, for viewing or editing. Alternatively, you may be prompted to save the file. If that's the case, you can open it up in Word after you save the file to your hard drive.

*****BEGIN TIP***

[ic]Tip

Clients access documents on a project site in a manner that is different from the way team members access linked files or folders. When a client opens a document on a project site, the file is served over HTTP so that the client can easily access the file from a remote location.

When a team member opens a document from the Linked Content or File Explorer module, a request for the file is served over HTTP, which is handled by the Sitespring Helper client. The Sitespring Helper application then opens the file by accessing \\Servername\Sharename. You might have problems if you're accessing the team member application remotely and Sitespring Helper cannot access the network share. Solutions to problems like this are covered in Chapter 18.

END TIP*

After you are done reviewing the file, you can specify a new approval status and optionally send comments back to the project team.

To approve a file and send comments back to the team:

****** BEGIN STEPS***

1. From the project site home page, under Files For Review, click the Needs Approval link under Approval Tracking for the Project Plan file.

2. On the Approval Tracking page, set the status to Approved and enter some feedback in the Comments field.

3. Click Submit.

****** END STEPS***

After changing a document's approval status, Sitespring sends project team members an email informing them of the status change, unless they've modified their notification settings.

(e)Completing a Client Task

To mark the Client Review of Project Plan task as completed:

****** BEGIN STEPS***

1. From the project site home page, under Client Tasks, click the Client Review of Project Plan task link.

2. On the Task Detail page, check the Task Complete check box next to Status and optionally enter some feedback in the Comments field. For the tutorial, enter: "The project plan looks great and reflects our discussions. You have my approval to move forward. I'm excited!"

3. Click Save.

****** END STEPS***

This changes the status of the task to Client Completed and sends another email notification to the project team members.

******BEGIN USER CHANGE ICON/NOTE***

Team member: Wendy the Web Producer

Username: **wendy**

Password: **wendy**

END USER CHANGE ICON/NOTE***

As Wendy, you just received two email messages indicating that the Project Plan file was approved (because Chris changed the status of the file to Approved) and that the client completed the corresponding review task (because Chris changed the status of the task to Client Completed).

Logging into Sitespring, you go to the Sirius Snowboards Web Site project page and see that the status for the review task has been changed to Client Completed. Clicking this task reveals the comments from the client: "Project Plan file reviewed and approved, looks great."

Going back to the project page, you click the Details link next to Project Site and see that the Project Plan file was approved by Chris. You also see the date on which it was approved. (See Figure 2.15.) Clicking the Approved link brings up the Document Item Review page, which presents this same information. The page also shows the comments that were entered at the time of approval: "The project plan looks great and reflects our discussions. You have my approval to move forward. I'm excited!"

Finally, you're done with the second task of your project[md]only eight more to go!

(d)Create or Import Remaining Tasks

If you choose to do so, you may follow a similar process to complete the remaining tasks, as detailed in Table 2.3. Most of these tasks will follow a similar procedure for creating and reviewing deliverables.

For comparison, you can swap out your database with one that has the tasks for this project completed up to this point. However, if you've made any changes to the user's email addresses or mail server settings, you'll need to redo those changes after importing the database. You'll also need to remove the SiriusSnowboards folder and add it again from the appropriate share.

To import a database that reflects the tutorial data up to this point, follow the instructions at the beginning of this chapter to import a database, but copy application-finish.db instead of application-start.db.

(c)Summary

By now you should have a good understanding of how Sitespring's features might be used to support the web production process of a small team. If you'll be using Sitespring in a small setting, try to identify where there are similarities or differences between this tutorial and your real-world environment.

If you find there are a lot of differences, you might gain some insight from Chapter 3. In this chapter, we show how a larger group might use a more elaborate development process to build a web-based application.

[END CHAPTER]