



Automation Services 9.0 Workflow Reference

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Introduction

This Guide explains the functionality of the workflows included with Automation Services for Quark Publishing System® (QPS®).

Where we're coming from

This book assumes you are familiar with your computer and know how to:

- Launch an application
- Open, save, and close files
- Use menus, dialog boxes, and palettes
- Use the mouse, keyboard commands, and modifier keys

If you need help performing any of these tasks, consult the documentation resources (user or reference guides) provided with your computer.

Conventions in this book

Formatting conventions in this guide highlight information to help you quickly find what you need.

- **Bold type style:** The names of all dialog boxes, fields, and other controls are set in bold type. For example: "Click **Storage** in the **Administration** pane."
- **References:** In descriptions of features, parenthetical references guide you in accessing those features. For example: "The **System Storage** controls (**Administration** pane) let you designate asset storage."
- **Arrows:** You will often see arrows (>), which map the path to a feature. For example: "Choose **Administration > User Profiles** to add a user."
- **Icons:** Although many tools and buttons are referenced by name, which you can see by displaying ToolTips, in some cases icons are shown for easy identification.

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- Cross-platform issues: Some labels, buttons, key combinations, and other aspects of QPS client applications differ between Mac OS® and Windows® because of user interface conventions or other factors. In such cases, both the Mac OS and Windows versions are presented, separated by a slash, with the Mac OS version presented first. For example, if the Mac OS version of a button is labeled **Select**, and the Windows version is labeled **Browse**, you are directed to "Click **Select/Browse**." More complex cross-platform differences are mentioned in notes or parenthetical statements.
- ➔ Notes provide helpful information about particular features and general techniques for using the software.

Understanding workflows

A workflow is a predefined sequence of actions for creating output. You can also think of a workflow as a framework on which you can build an automated task. For more information, see "Understanding workflows" in *A Guide to Automation Services*.

Workflows

The following topics describe the workflows currently available from Quark for Automation Services.

- ➔ In order to work correctly, Automation Services needs to have sufficient rights to read and write to the folders it works with. For more information, see "Setting access privileges and idle time-out" in *A Guide to Automation Services*.

Publish to App Studio

The Publish to App Studio workflow lets you transform a QuarkXPress® layout that has been tagged with App Studio XTensions software into an App Studio issue (a .zave file) that can be viewed in an App Studio reader app.

In addition to using the controls built into this workflow, you can use a variety of QPS attributes to control various aspects of the App Studio issues that this workflow creates. For more information, see "App Studio QPS attributes" in *A Guide to App Studio*.

- ➔ This workflow is designed to work with QPS trigger assets.
 - **Media Folder Paths:** Specify the path(s) where any media files required by the workflow can be found. When the automation profile executes, the software searches these paths for any files referenced in interactive items. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has read access. If Automation Services cannot locate a picture file, it substitutes a default picture with the same name as the missing picture. The default picture can be found at `[application folder]\AutomationServices_Data\Resources\ProfileManagement\FallbackImage.jpg`.
 - **Image Format:** This option controls the way images in the layout are stored: PNG or JPEG. If you choose JPEG, you can use a slider to control the image quality.
 - **Page Format:** This option controls the way the layout images are stored. If you choose JPEG, enter the desired DPI value in the **Maximum Size (pixels)** field. If you choose PDF, the **Generate separate PDF for each page** check box lets you create a separate PDF for each page (leave this box unchecked to minimize issue file size). To control how PDF files are generated, check **Select output style** and choose from a list of the PDF output styles

available to QuarkXPress Server. If you don't specify an output style, the default output style is used. Use the **Page Thumbnail** controls to specify the format of page thumbnails; choose PNG for best quality, or JPEG for smallest size.

- **Output:** Choose **Layout** to export the layout with no reflow view, **Reflow** to export the reflow view with no layout, or **Layout and Reflow** to export both layout and reflow view. Click **Save to Web Feed URL** to post the exported file to a Web server, or **Save to File System** to save it to the file system. If you click **Save to Web Feed URL**, make sure the HTTP PUT method is enabled for the Web server.

XML to QuarkCopyDesk

The XML to QuarkCopyDesk® workflow lets you transform content from QuarkXPress projects, QuarkCopyDesk articles, and XML sources into QuarkCopyDesk articles without using an article template.

If the output of the transformation for this workflow includes a QPSEntityModel mapping component, Automation Services uses the default Job Jackets file (if any) for the target main category/subcategory. Otherwise, Automation Services uses the default server-level Job Jackets file for QPS.

- **Transformation:** Choose a transformation that has QuarkCopyDesk as an output format, such as **DITA to QuarkCopyDesk Article with Template**.
- **Image Folder Paths:** Specify the path(s) where any images required by the workflow can be found. When the automation profile executes, the software searches these paths for any images referenced in the transformation's XML output, attaches them to the article, and checks them into QPS (if necessary). Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has read access. If Automation Services cannot locate a picture file, it substitutes a default picture with the same name as the missing picture. The default picture can be found at `[application folder]\AutomationServices_Data\Resources\ProfileManagement\FallbackImage.jpg`.
- **Save Location:** Specify where you want the final file to be put. You can save the file to the file system or check it into QPS. If you check the file into QPS, the transformation must supply the corresponding metadata in a QPSEntityModel output. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output article. Pictures are stored in a "Pictures" folder at the same level as the output article.

XML to QuarkCopyDesk From Template

The XML to QuarkCopyDesk From Template workflow lets you transform content from QuarkXPress projects, QuarkCopyDesk articles, and XML sources into QuarkCopyDesk articles with an article template.

- **Template:** Choose a QuarkCopyDesk article template.

- **Transformation:** Choose a transformation that accepts a QuarkCopyDesk template and has QuarkCopyDesk as an output format, such as **NewsML to QuarkCopyDesk Article with Template**.
- **Image Folder Paths:** Specify the path(s) where any images required by the workflow can be found. When the automation profile executes, the software searches these paths for any images referenced in the transformation's XML output, attaches them to the article, and checks them into QPS (if necessary). Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has read access. If Automation Services cannot locate a picture file, it substitutes a default picture with the same name as the missing picture. The default picture can be found at `[application folder]\AutomationServices_Data\Resources\ProfileManagement\FallbackImage.jpg`.
- **Save Location:** Specify where you want the final file to be put. If you check the file into QPS, the transformation must supply the corresponding metadata in a **QPSEntityModel** output. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output article. Pictures are stored in a "Pictures" folder at the same level as the output article.

XML to QuarkXPress

The XML to QuarkXPress workflow lets you transform content from QuarkXPress projects, QuarkCopyDesk articles, and XML sources into QuarkXPress layouts with a QuarkXPress template.

- **Template:** Choose a QuarkXPress article template.
 - **Transformation:** Choose a transformation that accepts a QuarkXPress template and has QuarkXPress as an output format, such as **DocBook to QuarkXPress Template to PDF**.
 - **Image Folder Paths:** Specify the path(s) where any images required by the workflow can be found. When the automation profile executes, the software searches these paths for any images referenced in the transformation's XML output, attaches them to the layout, and checks them into QPS (if necessary). Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has read access. If Automation Services cannot locate a picture file, it substitutes a default picture with the same name as the missing picture. The default picture can be found at `[deployment directory]\AutomationServices_Data\Resources\ProfileManagement\FallbackImage.jpg`.
 - **Save Location:** Specify where you want the final file to be put. If you check the file into QPS, the transformation must supply the corresponding metadata in a **QPSEntityModel** output. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output project. Pictures are stored in a "Pictures" folder at the same level as the output project.
- ➔ If a transformation in an automation profile makes changes to an existing project and then checks it in as a new revision, you need to be aware of how Automation Services deals

with attachments in such projects. If the automation profile makes changes to a box that has an attachment, the attachment is detached in the new revision, unless the Automation Profile includes a **QPSEntityModel** mapping component for the attached article. If the automation profile produces a new project rather than a new revision of an existing project, *all* attached articles are detached unless they have corresponding **QPSEntityModel** mapping components.

XML to QuarkXPress using XSLT

The XML to QuarkXPress using XSLT workflow lets you transform content from QuarkXPress projects, QuarkCopyDesk articles, and XML sources into QuarkXPress layouts with a QuarkXPress template and an XSL transform.

➔ The output of the XSLT must be valid Modifier XML.

- **Template:** Choose a QuarkXPress project template.
- **Transformation:** Choose a transformation to be executed prior to the XSLT. You can use the metadata inputs and outputs to handle any metadata that is involved. The other output must be something that can be fed to the XSLT.
- **Image Folder Paths:** Specify the path(s) where any images required by the workflow can be found. When the automation profile executes, the software searches these paths for any images referenced in the transformation's XML output, attaches them to the layout, and checks them into QPS (if necessary). Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has read access. If Automation Services cannot locate a picture file, it substitutes a default picture with the same name as the missing picture. The default picture can be found at `[deployment directory]\AutomationServices_Data\Resources\ProfileManagement\FallbackImage.jpg`.
- **XSL Transform:** Specify the location of the XSLT file you want to use. When the automation profile executes, the software executes this XSLT file on the output from the transformation before rendering it as a QuarkXPress project.

➔ This workflow currently supports only XSLT 1.0.

- **Save Location:** Specify where you want the final file to be put. If you check the file into QPS, the transformation must supply the corresponding metadata in a **QPSEntityModel** output. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output project. Pictures are stored in a "Pictures" folder at the same level as the output project.

➔ If a transformation in an automation profile makes changes to an existing project and then checks it in as a new revision, you need to be aware of how Automation Services deals with attachments in such projects. If the automation profile makes changes to a box that has an attachment, the attachment is detached in the new revision, unless the Automation

Profile includes a **QPSEntityModel** mapping component for the attached article. If the automation profile produces a new project rather than a new revision of an existing project, *all* attached articles are detached unless they have corresponding **QPSEntityModel** mapping components.

XML to XHTML

The XML to XHTML workflow lets you transform content from QuarkXPress projects, QuarkCopyDesk articles, and XML sources into XHTML format. You can then automatically upload the resulting XHTML content into Drupal.

- **Transformation:** Choose a transformation that accepts an XML input and has XHTML as an output format, such as **DITA Topic to XHTML to Drupal** or **QuarkCopyDesk to XHTML to Drupal**.
- **Image Folder Paths:** Specify the path(s) where any images required by the workflow can be found. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has sufficient access rights to read files.
- **Image Format:** Specify the format and (if applicable) quality level for pictures in the workflow.
- **Save Location:** Specify where you want the final files to be put. You can save the output to the file system or submit it as a "Page" to a running instance of the Drupal Web content management system.

If you save the output to the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output XHTML file. Pictures are stored in an "Images" folder at the same level as the output XHTML file.

If you submit the output to Drupal, you must specify the node location of the file that you are uploading. All nodes created by this workflow will be placed at that location, in a node with the same name as the trigger asset. For example, if you specify the location `news/sports` and the name of the trigger asset is "Tennis.xml," the content is checked in at `news/sports/Tennis`. The title of each page is determined by the `<title>` tag in the XHTML output.

- ➔ If an automation profile creates a new version of a page that already exists in Drupal, Drupal will create a new version of only the page itself; any pictures used in the page will simply be replaced.
- ➔ Drupal locations should not start with a slash (/).

If you have trouble submitting content to Drupal, a good place to start troubleshooting is the "AutomationServices.Server.config" file (located at `[application folder]\AutomationServices_Data\Resources\Configuration`). Locate the "scriptRelativeUri" `<entry>` element and verify that the "Quark Automation Services

Content Uploader" page can be found in this directory (for more information, see "Installing Drupal for Automation Services" in the Automation Services ReadMe file). Locate the "imageFolderPath" <entry> element and make sure this path points to the directory where you want picture files to be uploaded.

Another setting to check is the `imagefolderpath` entry in the "AutomationServices.Server.config" file (located at `[application folder]\Server\AutomationServices_Data\Resources\Configuration`). This entry should be set to the same value as the `IMAGES_ROOT` value in the "Drupal Content Uploader.php" file.

XML to WebFeed

The XML to WebFeed workflow lets you transform content from QuarkXPress projects, QuarkCopyDesk articles, and XML sources into formats such as RSS and Atom and post them to a Web feed location via HTTP or the file system.

- **Web Feed:**
 - **Save to Web Feed URL:** Use this option to post the updated Web feed via HTTP. Enter the URL of the input/output file in the **URL** field, then enter a user name and password in the **Web Server Username** and **Web Server Password** field. If you use a proxy server, enter values in the **Proxy Server Username** and **Proxy Server Password** fields. Make sure the HTTP PUT method is enabled for the Web server.
 - **Save to File System:** Use this option to save the updated Web feed to a file system location. Specify where you want the final file to be put. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output project. Pictures are stored in a "Pictures" folder at the same level as the output project.
- **Transformation:** Choose a transformation that accepts an XML input and has a Web feed format as an output format, such as **XML to RSS**.

XML to XML

The XML to XML workflow lets you transform content from QuarkXPress projects, QuarkCopyDesk articles, and XML sources into any valid XML output format.

- **Transformation:** Choose a transformation that accepts an XML input and has XML as an output format.
- **Save Location:** Specify where you want the final file to be put. If you check the file into QPS, the transformation must supply the corresponding metadata in a **QPSEntityModel** output. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output XML file.

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If you save the output to the file system, you must use a valid UNC path to which the Automation Services server has write access, and the path must include the name of the output XML file.

Export from QuarkXPress Project

The Export from QuarkXPress workflow lets you export layouts from QuarkXPress projects in various formats. You can export Print layouts in PDF and SWF format and Interactive layouts in SWF format.

- **Image Folder Paths:** Specify the path(s) where any images required by the workflow can be found. This parameter is used only if the QuarkXPress project originates from the file system. If the project is in QPS, its picture attachments (if any) are used. If the project is in the QuarkXPress Server document pool, Automation Services assumes that the pictures are also in the document pool. Note that if you specify a path in the file system, you must use a valid UNC path to which the Automation Services server has read access.
- **Rendition:** Choose the name of the output style you want to use for PDF rendering. If you do not choose a value, Automation Services uses the default QuarkXPress Server render type.
- **Save Location:** Specify where you want the final file to be put. Note that if you specify a path in the file system, you must use the valid UNC path of a directory which the Automation Services server has write access. Automation Services auto-generates output file names using the formula `[ProjectName]_[LayoutName].[FormatExtension]`.

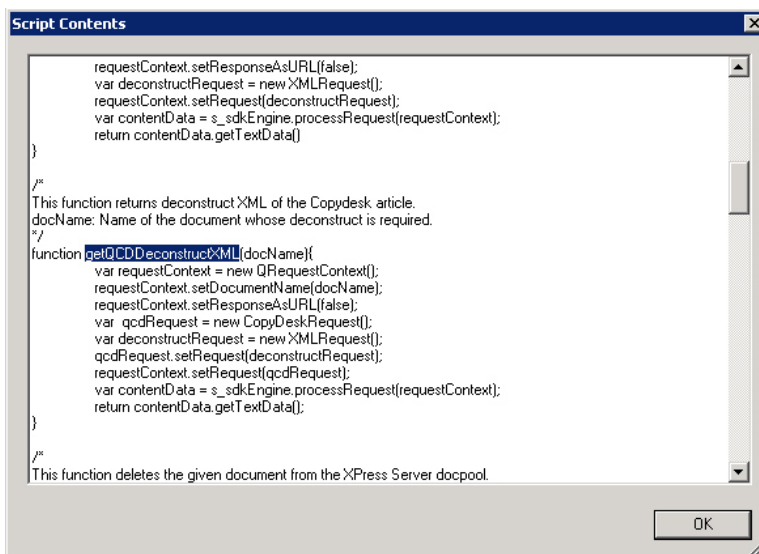
Execute QPS Script

The Execute QPS Script workflow lets you execute either a single function in a QPS script or the entire script.

The screenshot shows the 'Workflow Variables' dialog box. It has a title bar 'Workflow Variables'. Below the title bar, there is a 'Script:' dropdown menu with 'QxpsmFunctions' selected and a 'Preview...' button to its right. Below that is a checked checkbox 'Select Function:' followed by a text field containing 'getQCDDeconstructXML'. Below the text field is a table with two columns: 'Parameter Value' and an empty column. The first row of the table has a dropdown menu with 'Trigger Asset' selected. Below the table are three buttons: a plus sign '+', a document icon, and two arrow buttons (up and down).

Workflow Variables area for Execute QPS Script workflow

- **Script:** Select the name of the target script.
- **Preview:** Displays the selected script in the **Script Contents** dialog box. If you only want to execute a single function, this can help you to locate the function you want and determine what its parameters are and what order they occur in.



Script Contents dialog box

- **Select Function:** If you want to execute a single function, check this box and enter the function name (without parameters) in the corresponding field.
- **Parameter Value list:** The rows in this list correspond to the parameters of the selected function. The first row corresponds to the function's first parameter, the second row to the function's second parameter, and so forth. To add a row, click +. To pass a trigger asset to a parameter, choose **Trigger Asset** from the drop-down menu for that row. To pass a literal value to a parameter, choose **Other** from the drop-down menu for that row and then double-click in the corresponding field to the right and enter the value.

If you plan to use the trigger asset, a template, or some other file or asset as a parameter value for a script, you must make sure the script has been set up to handle that file or asset. To do so, load the "ScriptWorkflowUtil.js" script and use its `createFilePathContainer()` method. For example, if you wanted to write a simple script that writes the name of the trigger asset to the console, it might look like this:

```

load("AutomationServicesUtil");
...
function displayFileName(filePathParam)
{
    // Create a filePathContainer from the file path parameter
    var filePathContainer = createFilePathContainer(filePathParam);
    if (filePathContainer.assetId != null) {

        // Get the file name and write it to the console
        var assetName = getAssetName(filePathContainer.assetId);
        print(assetName);
    }
}

```

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The `createFilePathContainer` function (supplied in the "AutomationServicesUtil.js" script) takes a file reference that has been passed from Automation Server and converts it to a `filePathContainer` object. You can then access the path to the asset with `filePathContainer.filePath` and get the ID of the asset with `filePathContainer.assetId`.

For more information, see the documentation in the "ScriptWorkflowUtil.js" script.

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