Content Composer

Web Client

Version: 22.1

Written by: Documentation Team, R&D
Date: Wednesday, February 4, 2026

HYLAND™

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Content Composer Web Client

About Content Composer Web Client

The Content Composer Web Client provides a web interface that enables you to generate documents based on templates designed in the Content Composer Studio.

Logging On

To log on to the Content Composer Web Client:

1. Open the login page from a web browser.
2. In the logon dialog box, in the **Username** field, enter your user name.
3. In the **Password** field, enter your password.
4. Click **Login**.

Logging Out

To log out of Content Composer Web Client:

- From the menu in the upper-right corner, select **Log Out**.

Settings

Changing the Display Language

To select another display language:

1. From the user menu in the upper-right corner, select **Settings**.
2. In the **Settings** pane, select **General**.
3. In the **General** pane, from the **Language** list, select the desired language, or select **System Default** to use the language set as the default language for your browser.

Changing the Display Theme

To change the display theme to more comfortably view content and reduce visual strain:

1. From the menu in the upper-right corner, select **Settings**.
2. In the **Settings** pane, select **General**.
3. In the **General** pane, from the **Theme** list, select one of the following options.
   - **System Default**: Displays the interface in light or dark mode depending on the default display mode configured for your system.
   - **Light**: Displays dark text and icons on a light background.
   - **Dark**: Displays light text and icons on a dark background.

About Communications

A communication is the task of generating the documents of a communication template.

The documents that you generate in the Web Client are stored on the server for as long as the communication exists.

Notes

- A communication is called *Process* in the Content Composer Client.
- A communication template is called *Bundle* in the Content Composer Studio and Client.

About the Communications Pane

The **Communications** pane lists all open and forwarded communications.

To be able to view the list of communications, you must possess the right **Process List (14)**. Users without this right can only view single communications by accessing the direct link to the respective communication.

Each communication displays the following properties.

- Template
- Name

  Note: If no name has been assigned, **<Untitled>** is displayed instead.
- Created By
- Date Created

Note: The Web Client displays a maximum of 1000 communications.

Icons in the Communication and Document Pane

Icons in the Communications Pane

Icon	Description
	Open communication
	Forwarded communication

Icons in the Communication Document List

Icon	Description
	Microsoft Word document
	PDF document
	TIFF document
	XPS document

Document Copies

Copies of a document are displayed with the term **<Copy>** before the file name.

Sorting the Communications

By default, the communications are sorted in descending order by **Date Created**.

To sort the communication list:

- Click on one of the column headings.

Searching for a Communication

To display only communications that contain a specific search term:

- In the **Communications** pane, in the **Search** field, enter a search term.

  Note: You can search for the **Template** name, **Name**, **Created by**, and **Date Created**.

Creating a Communication

Prerequisite

To be able to create a communication, you must possess the right **Create Web Client Communication (46)**.

To create a communication:

1. In the **Communications** pane, click **Create Communication**.
2. In the **Create Communication** pane, from the **System** drop-down list, select a system.
   The available communication templates are listed below.
3. Optional. In the **Search Templates** field, enter a search term.
4. In the left pane, select a communication template.
5. Optional. In the **Communication Name** field, enter a unique name so that you can easily find this communication later.
6. Optional. In the **Communication Type** field, enter a descriptive text.
7. Click **Create Communication**.
8. Generate the documents.

Creating a Communication from a Third-Party Application

To create a communication from a third-party application, you can pass the Web Client URL, optionally along with the system ID and the template name.

- To access the **Create Communication** pane, pass the URL as in the following example:
  `https://[localhost/COCO_WEBCLIENT]/communications/create`
- To access the **Create Communication** pane in a specific system, pass the URL as in the following example:
  `https://[localhost/COCO_WEBCLIENT]/communications/create?systemid=[TEST]`
- To access the **Create Communication** pane in a specific system and select a template, pass the URL as in the following example:
  `https://[localhost/COCO_WEBCLIENT]/communications/create?systemid=[TEST]&templatename=[TEST_TEMPLATE]`

Viewing a Communication

To view a communication:

1. From the **Communications** pane, select a communication.
   The communication template opens. All contained documents are listed below **Document Name**.
2. To view the text blocks of a document, select the document.
   The text blocks display in the right pane.
3. To return to the communication list, in the upper-left corner, click **Communications**

Generating Documents

To generate the documents:

1. From the **Communications** pane, select a communication.
2. In the **Communications** pane, select the required documents and deselect the documents that are not required.

   Note: You can neither enable disabled documents nor disable required documents.

3. To view the text blocks of a document, select the document.
4. In the right pane, select the required text blocks and deselect the text blocks that are not required.

   Note: You can neither enable disabled text blocks nor disable required text blocks.

5. In the upper-right corner, click **Generate Documents** .

   Note: If no document requires manual data input, you can also click **Finish** to generate the documents and send them to the output channel.

   Generated documents are marked with an asterisk.
6. If a document requires manual data input, the corresponding fields are displayed. Enter the appropriate values and then click **Generate**.
7. Optional. "Editing a Document" below.
8. To send the communication to the output channel, click **Finish**.

   For more information, see "Finishing a Communication" on the next page.

Editing a Document

Notes

- The **Edit** button is only available if the user has the **Download created documents (13)** right.
- The **Edit** button is only enabled if the selected document is a Microsoft Word document.
- As long as a Content Composer document is open in Word, the **Edit** button is disabled for all other documents.
- The user can open a password protected document, but cannot edit or save it.
- If the password is given, the user can edit and save the document.

To edit a document:

1. In the left pane, select a document that has already been generated.
2. Click **Edit Document**.

   The document is displayed in a new Word window.
3. Edit the document as required and then click the **Close** button in Word.

   Note: Saving the document in Word does not save the changes to the server.
4. In the **Would you like to save your changes to [DocumentName]** dialog box, click **OK**.

   The changes are saved to the server.

Forwarding a Communication

Prerequisite

To be able to forward a communication, you must possess the right **Forward process manually (21)**.

Note: This functionality is not supported when using Hyland IdP.

To forward a communication to another user:

1. From the **Communications** pane, select the communication you want to forward.

2. In the lower-right corner, click **Forward** .
3. In the **Forward Communication** dialog box, complete one or all of the following steps and then click **Forward**.
   - To forward the communication to a single user, from the **Single User** list, select the user to whom you want to forward the process.
   - To forward the communication to a group of users, from the **All Users in Group** list, select the user group to which you want to forward the process.

Result The communication is forwarded to the selected user and / or group of users and removed from the sender's communication list.

Finishing a Communication

Prerequisite

To be able to finish a communication, you must possess the right **Print and Archive (24)**.

Note: The **Finish** button corresponds to the **Print and Archive** button in Content Composer Client.

To finish a communication and send it to the output channel:

1. From the **Communications** pane, select the communication you want to finish.
2. In the lower-right corner, click **Finish**.
   The Web Client generates the documents and sends the communication to the output channel.

Deleting a Communication

To delete a communication:

1. From the **Communications** pane, select the communication you want to delete.
2. In the lower-right corner, click **Delete** .
3. In the **Delete Communication** dialog box, click **Delete Communication**.