Ektron

Redefining Web Content Management

Ektron CMS200/300 Setup Manual

Version 4.5, Revision 3

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Version 4.5, Revision 3, July 12, 2004

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LA10031, Revision 1.4

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Author's Note

This manual documents both Ektron CMS200 and Ektron CMS300. With the exception of a few features that are labeled CMS300 only, Ektron CMS300 and Ektron CMS200 have the same functionality.

In this manual, some screens show CMS300 in the title bar, and some directory paths mention CMS300, such as `C:/Program Files/Ektron/CMS300/Utilities/`. If you are using CMS200, substitute 200 for 300 in these cases.

What's In This Manual

In this manual, the *Ektron CMS200/300 Setup Manual, Version 4.5*, you will find information including:

- Ektron CMS200/300 Minimum Requirements
- Pre installation Tasks
- Upgrading Ektron CMS200/300
- Installing Ektron CMS200/300
- Ektron CMS200/300 Hosting Example
- Setting Up a MS-SQL, MySQL, or Oracle Database
- Creating a DSN-less Connection
- Configuring and Using SSL for Ektron CMS200/300
- Migrating Your Existing Web Site to Ektron CMS200/300

Upgrading Ektron CMS200/300

Before You Upgrade

Before you can upgrade your existing version of Ektron CMS200/300 to version 4.5, a new license key is required for the application to function properly. Using a license key from versions of Ektron CMS200/300 prior to 4.0 will result in the application not functioning.

If you have not already performed the license key upgrade wizard on the Ektron.com Web site, you can perform the process by going to the following URL, and performing the steps needed.

http://www.ektron.com/ektron_store.aspx

Upgrading

If you are using a previous version of Ektron CMS200/300, upgrading can easily be done through the installation program.

To upgrade to the latest version of Ektron CMS200/300, you must:

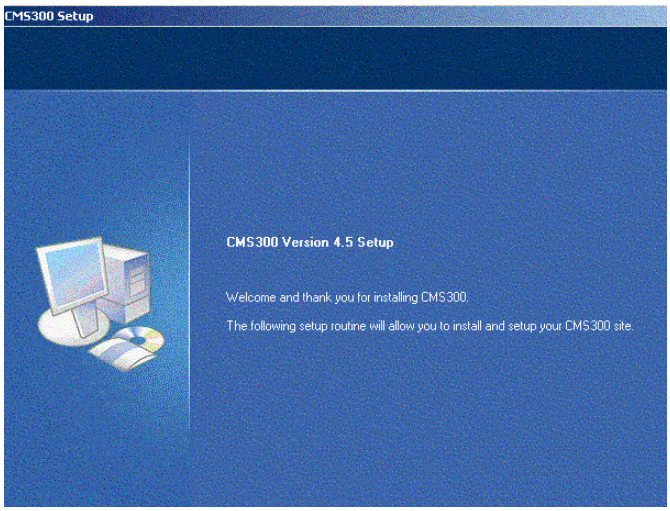
1. ”Performing the Upgrade” on page 3
2. ”Upgrading Your Database” on page 11
3. ”Updating Application Messages” on page 14
4. ”Updating Your Setup File” on page 18

This chapter will provide you with a walk through of the upgrade program, and any other steps needed to properly upgrade the application.

Performing the Upgrade

If you are using a previous version of Ektron CMS200/300, you can take advantage of the upgrade that is included in the installation file. The upgrade will install all the new files for Ektron CMS200/300.

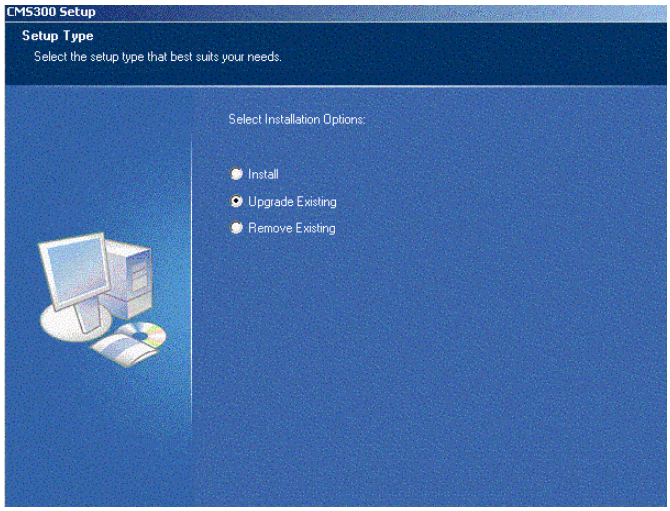
This section explains the steps for a Ektron CMS200/300 upgrade.

1. Double click the Ektron CMS200/300 executable file you downloaded from the Ektron site.	CMS300
2. The first screen appears. Click **Next** to proceed.	

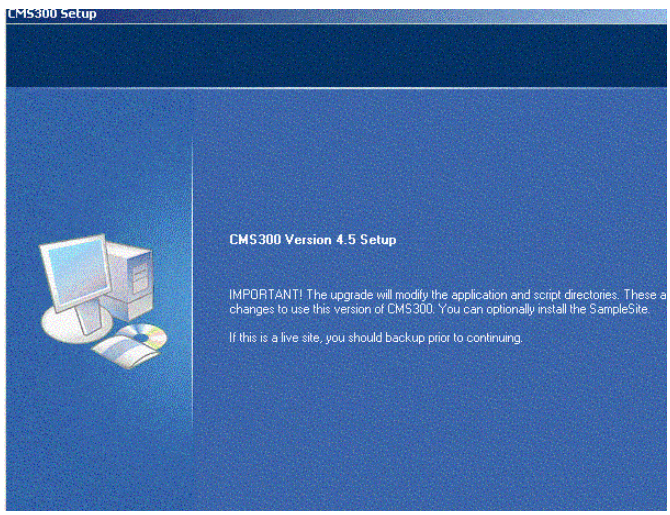
3. At the setup type screen, click “Upgrade Existing.”

   Click **Next** to continue.

For information about installing a new instance of Ektron CMS200/300, see ”Installing Ektron CMS200/300” on page 19.

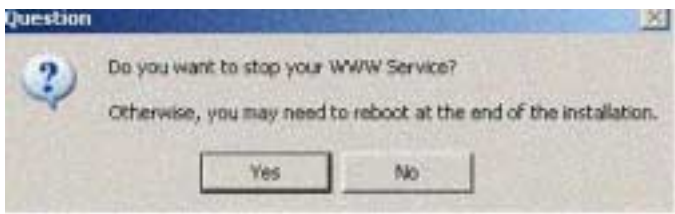


4. Click **Next** to proceed with the upgrade.



5. To avoid the possibility of rebooting at the end of the upgrade, you may stop your WWW Service here.

   Click the Yes button to stop your WWW Service.

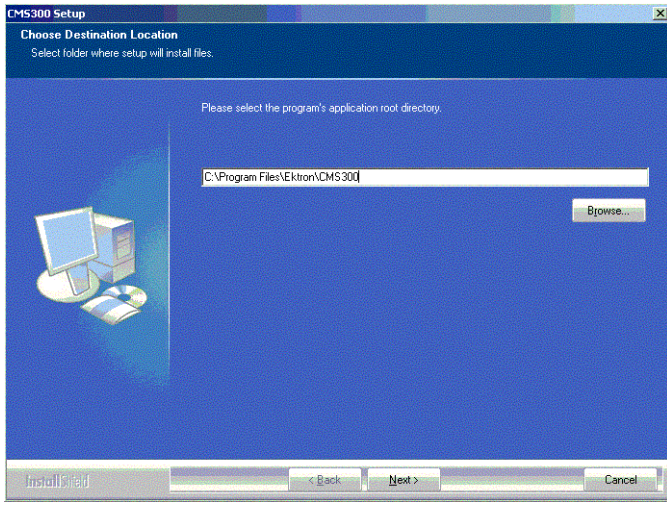


6. At the Choose Destination Location screen, specify the location of your application root directory.

   This is the location of the Ektron CMS200/300 components and utilities.

   If the default is incorrect, you may click the browse button to locate the correct directory, or you may enter the path into the text field.

   Click the Next button to continue.

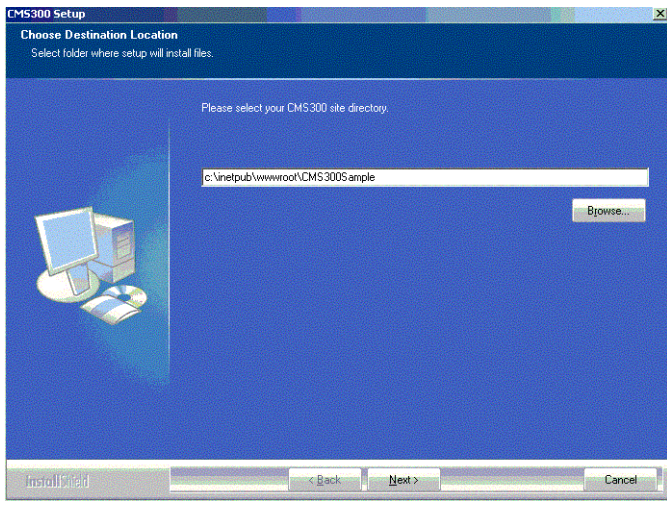


7. Specify the location of your Ektron CMS200/300 Web site at this screen.

   The site directory is the location of your Web site templates, CMS200/300scripts directory, etc.

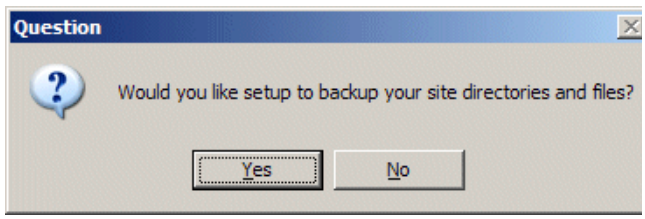
   If the default location is incorrect, click the browse button to locate the correct directory, or enter the full path into the text field.

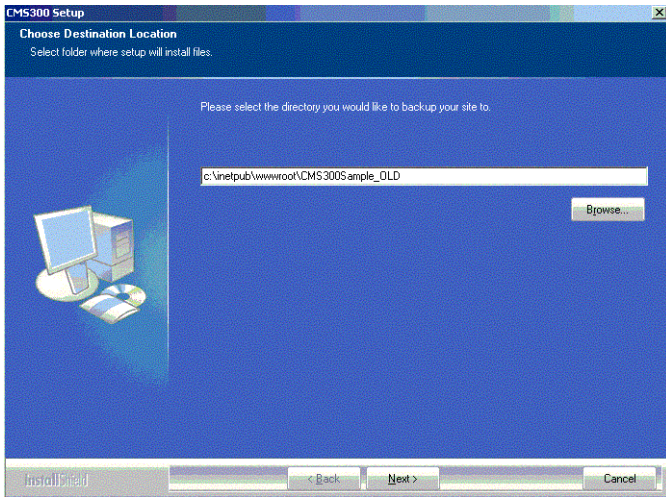
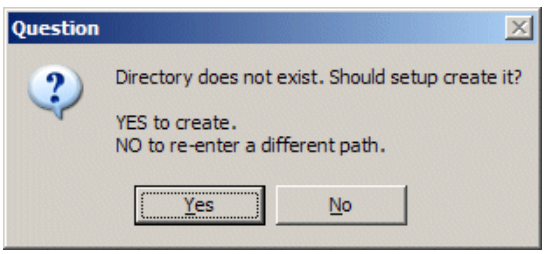
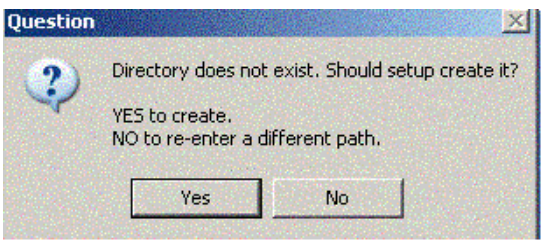
   Click the Next button to continue.



8. Click the Yes button for the setup program to make a backup of your existing Ektron CMS200/300 Web site files.

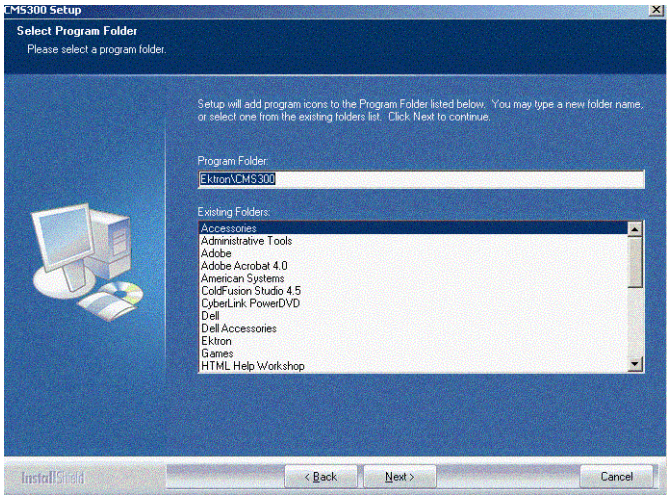
   If you click No, proceed to step 13.



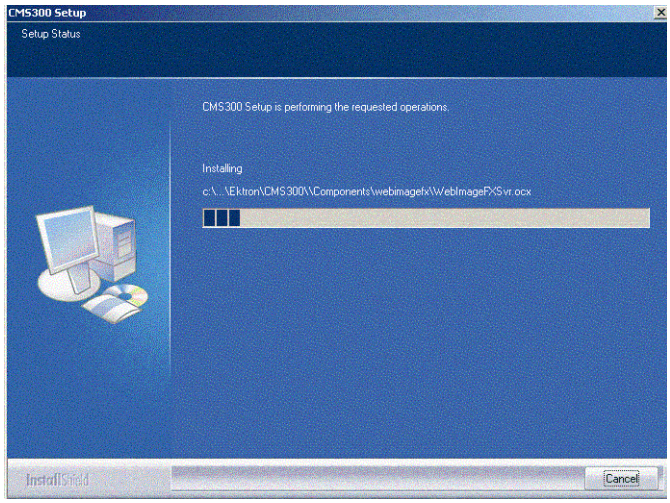
9. Specify the location where you would like to backup your existing Ektron CMS200/300 files to. Keep the default, enter a new path, or click the browse button to browse for a folder. Click the Next button to continue.	
10. Click the Yes button to create the new directory. Click No to go back and select a different folder to backup the files to.	
11. You are informed that Backup directory does not exist. Click the Yes button for install to create the new directory. Click No to go back and select a different folder to backup the files to	

12. Specify the program folder you would like to install the Ektron CMS200/300 short cuts to in the Windows Start menu.

    Click the Next button to continue.



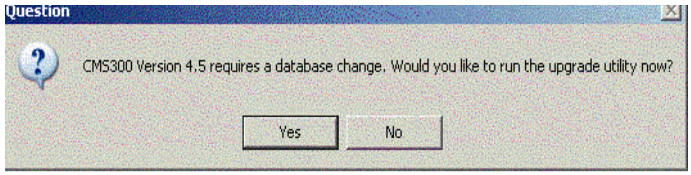
13. Since the upgrade program has all the required information, the program will now go through the process of installing and configuring all the necessary files.



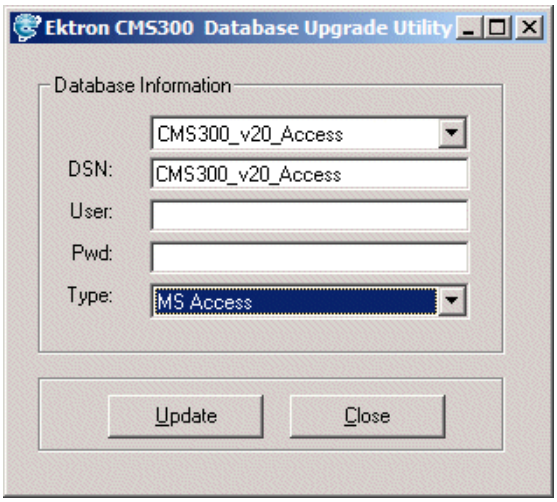
14. Once the files are installed, you will be prompted to upgrade the database.

    To upgrade the database now, click the Yes button.

For information about updating the database later, see "Upgrading Your Database" on page 11.



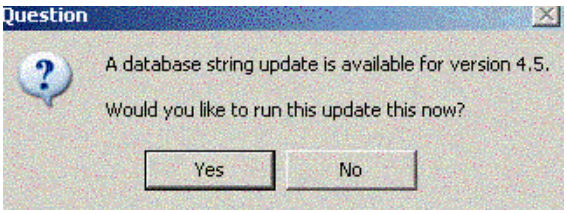
15. The Ektron CMS200/300 Database Upgrade Utility appears.
16. Select the DSN for the old database from the drop down list.
17. Specify the username and password that is needed to access the DSN if required.
18. Choose the database type of your previous (source) Ektron CMS200/300 database.
19. Click the **Update** button to execute the database upgrade utility.



20. After the database is upgraded, you are prompted to update the database with all the new, required strings.

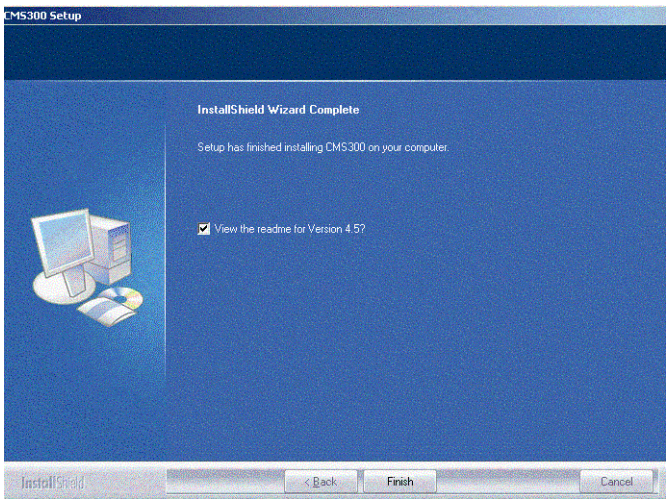
    Click Yes to continue, or No to update the strings at a later time.

For information about updating the strings later, see "Updating Application Messages" on page 14.



21. This screen signals that the upgrade is complete.

    Click **Finish** to end the upgrade.



What Happens After You Run the Upgrade

Now that you have run the upgrade from a previous version of **Ektron CMS200/300** to v4.5, here are the changes that take place:

- Install will create a backup of your old Sample site.
- The `/CMS200Scripts` or `/CMS300Scripts` directory and all the files and folders under it get replaced with the v4.5 files.

NOTE Install will replace the old /CMSx00Scripts directory with v4.5 scripts directory. So, you don't have to manually update the /CMSx00Scripts directory.

- The old database gets updated to v4.5.

NOTE When doing an upgrade, if you ran the dbupgrade and the language update utility, your old database gets updated to match v4.5 database. The DSN, however, remains the same as what you used in the previous version of CMS200 or CMS300. Hence you do not update setup.xxx file with the new Database and DSN.

- The new v4.5 COM Objects get added under `C:/Program Files/Ektron/CMS300/Components` directory.

NOTE Even though the old COM Objects still exist under the Components directory, the application uses the v4.5 COM objects. When doing the upgrade, install will

automatically register the v4.5 COM Objects for you. So, you do not need to register them again.

- The webimagefx directory under `C:/Program Files/Ektron/CMS300/Components` directory gets over-written with the new WebImageFX files.
- The new v4.5 scripts get added under the utilities directory.
- Install does not upgrade the sample site and places the v4.5 sample sites under *C:/Program Files/Ektron/CMS300/Utilities/CMS300Sample* directory.

NOTE If you want to use the v4.5 sample site, copy the CMS300Sample folder from `C:/Program Files/Ektron/CMS300/Utilities` directory and paste it in your CMS300Samples directory under `C:/Inetpub/wwwroot/CMS300Samples`. The old CMS300Samples folder gets replaced with the v4.5 sample site.

- The v4.5 databases cms300_v45_min_access2000.mdb and cms300_v45_sample_access2000.mdb get placed under `C:/Program Files/Ektron/CMS300/Utilities` directory.

What Happens Next?

Now that you have upgraded your sample site to v4.5, you are all set to use the v4.5 application.

If you did not run the dbupgrade or language update at the time of install, you need to do it manually. The next chapter explains how to do that.

Upgrading Your Database

If the database upgrade wasn't successful during the installation, or you chose to do it outside the install, you need to upgrade your database manually. You will use the Ektron CMS200/300 database upgrade utility supplied with the installation.

Prerequisites

Before you can upgrade your previous database, be sure the following conditions are met:

- Ektron CMS200/300 is installed on your server.
  See "Installing Ektron CMS200/300" on page 19or "Performing the Upgrade" on page 3 for more information.
- A DSN exists on your server that points to the old database that will be updated.

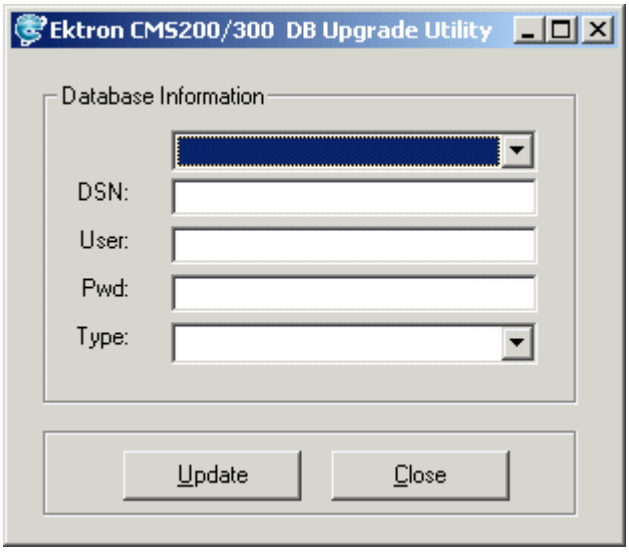
With these conditions met, you can update your database.

Performing the Database Upgrade

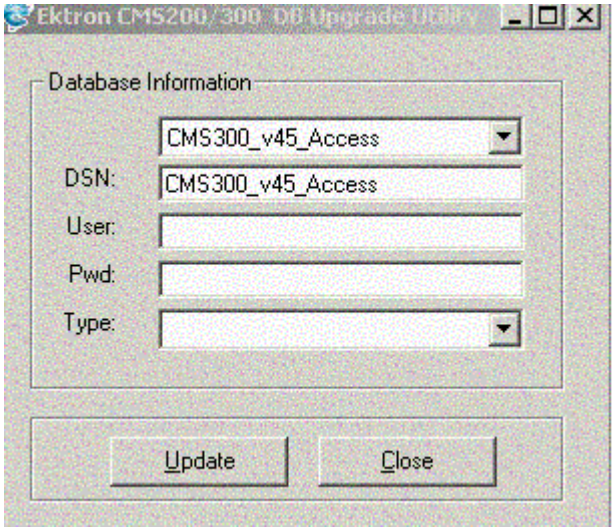
To perform the database upgrade:

1. Access the **dbupgrade.exe** file that is located under `C:\Program Files\Ektron\CMS300\Utilities` folder.
2. Double click the file.

3. The Ektron CMS200/300 Database upgrade utility opens.

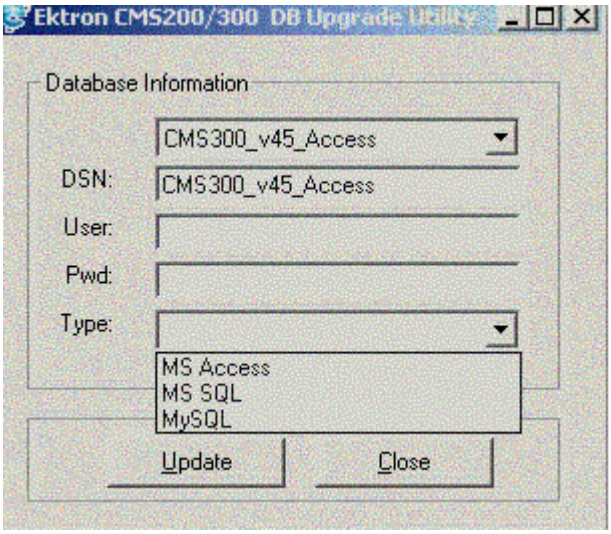


4. Choose the DSN for the database from the drop down list.

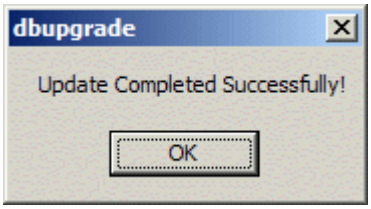


5. Enter a username and password in the fields if needed to access the DSN.

6. Select either MS Access, MS SQL or MySQL, depending on the type of Ektron CMS200/300 database you are currently using.



7. Click the **Update** button.
8. When the database is finished upgrading, the following message appears.



9. Click **OK** to close the window.
10. At the CMS Database Upgrade Utility, click the close button to close the program.

Updating Application Messages

Ektron CMS200/300 comes installed with language support for French and German. If you are upgrading from a previous version, and are using your old database, the translated strings are not included. Because of this, Ektron has included a utility with the installation that populates your old database with the translated strings.

This section explains how to use the language upgrade utility.

Upgrading Ektron CMS200/300

Before you can use the language upgrade utility, you must first upgrade your version of Ektron CMS200/300. For information on this, see ”Performing the Upgrade” on page 3.

During the upgrade, if you opted to keep your previous database, proceed with this chapter.

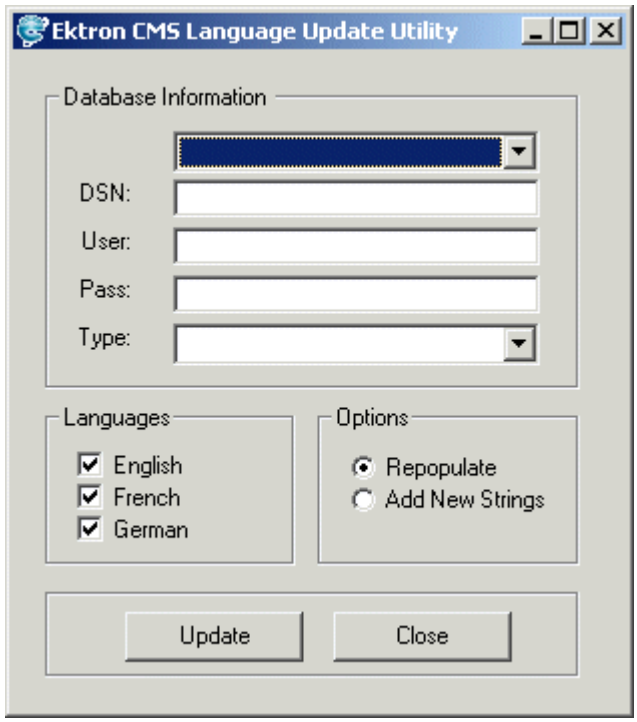
Using the Language Update Utility

To use the language update utility:

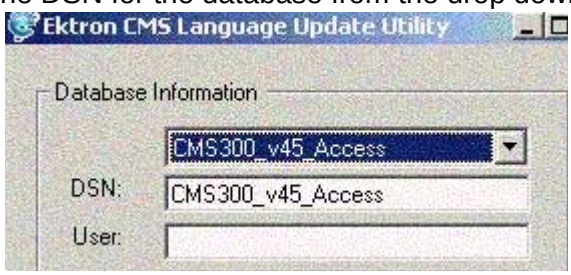
1. Access the langupdate.exe program that is located under `C:\Program Files\Ektron\CMS300\Utilities` folder.

2. Double click the langupdate.exe file.

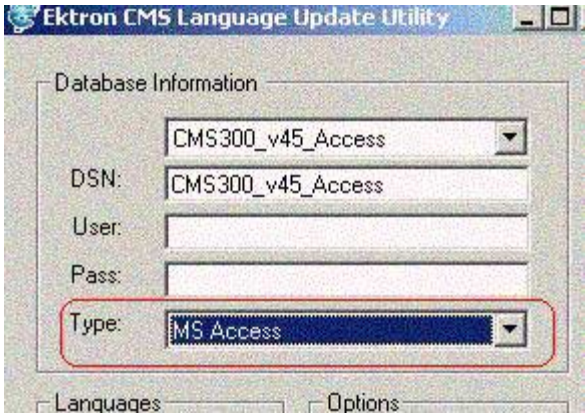
3. The Ektron CMS200/300 language update utility opens.



4. Select the DSN for the database from the drop down list.



5. Enter a username and password with permissions to the DSN if required.
6. Select the type of database you are currently using that will be updated with the language strings.



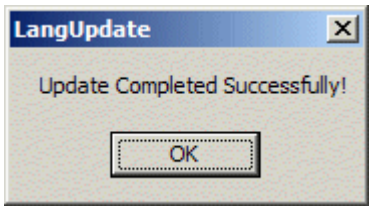
7. Select the action that you would like to perform.

- **Repopulate** - deletes all strings, and repopulates the database.
- **Add New Strings** - adds only new strings that have been added for the current release of Ektron CMS200/300. (Recommended if you have made changes to the existing strings)

8. Select the languages that you would like to be updated/added to the database.

9. Click the Update button when completed.

When the language update is complete, the following message is displayed.



10. Click **OK** to close the LangUpdate window.
11. Click the close button on the Ektron CMS200/300 Languages Update Utility window.

Updating Your Setup File

After you have upgraded your existing version of Ektron CMS200/300 to the newer version, you will need to update your setup files. The DSN in the setup files for the newer version, by default, points to the new database. If you wish to use your existing Ektron CMS200/300 database, you will need to update these files.

To update these files:

1. Open the file(s):
   - CMS200/300Sample/CMS200/300Scripts/setup.asp
   - CMS200/300Sample/CMS200/300Scripts/setup.aspx
   - CMS200/300Sample/CMS200/300Scripts/setup.php
   - CMS200/300Sample/CMS200/300Scripts/setup.cfm
2. Locate the line in the file(s) that begins with DSN=" "
3. Within the double quotation marks, enter the DSN of your existing Ektron CMS200/300

NOTE The database MUST have been updated to use, see "Upgrading Your Database" on page 11 and "Updating Application Messages" on page 14 for more information.

4. Save and close the file(s).

You are now ready to use your updated Ektron CMS200/300 Web site!

Installing Ektron CMS200/300

Before You Install...

Before you install **Ektron CMS200/300**, there are some thing that you'll need to know. This chapter summarizes the requirements for your system.

System Requirements

The following components are required when developing or viewing an Ektron CMS200/300 based application:

Browsers supported for viewing:

All major browsers including:

- Microsoft Internet Explorer 3.0 or higher
- Netscape Navigator Version 3.0 or higher
- Mozilla

Browsers supported for editing:

- Microsoft Internet Explorer 5.5 or later,
- Netscape Navigator 4.7x, Netscape 6, Netscape 7
- Mozilla 1.0.

NOTE If using Netscape browser, IE 5.0 or later must be installed.

Web Server Operating System

- Microsoft Windows 2000/2003/XP
- Microsoft Windows NT (Must be running service pack 6)
- Microsoft Windows 98/ME (With Personal Web Server)

Hardware

Any IBM-PC compatible system (suggested minimum requirements: Pentium 166 MHz or faster with at least 64MB of RAM)

Web development tools

Any Web development tools (e.g., Allaire HomeSite, Macromedia/ Allaire ColdFusion Studio, Macromedia Dreamweaver, Microsoft FrontPage 2000, NotePad)

Web application servers

- Microsoft Active Server Pages (ASP) 2.0 or higher
- Microsoft ASP.Net
- Macromedia ColdFusion (4.0.1 or higher including MX)
- PHP

NOTE ASP is required to properly run Ektron CMS200/300.

Web server

- Microsoft Internet Information Server (IIS) 4.0 or higher
- Personal Web Server

Databases supported

- Microsoft Access
- Microsoft SQL 7.0
- SQL 2000
- MySQL
- Oracle 9i
- Microsoft MSDE 2000

Preparing for Installation

Prior to installing Ektron CMS200/300, you must first perform the following tasks:

1. Install Microsoft Data Access Component (MDAC) Drivers version 2.1 or greater.

NOTE You will not need to install MDAC 2.1 drivers if you have Windows 98 Second Edition or greater and/or you have any type of Microsoft Office application installed on your machine.

2. Install a web server (such as, the Microsoft® Personal Web Server or Internet Information Server).
3. Install and configure your Web Application Server

Installing Microsoft Data Access Component (MDAC) Drivers

Install MDAC drivers version 2.1 or higher. We recommend the latest available from Microsoft.

To find out which drivers you have installed on your machine, you can download the Component Checker tool from Microsoft.

As of June 2000, all MDAC downloads are located at (www.microsoft.com/Data/download.htm).

After You Install...

Ektron strongly recommends configuring a secure socket layer (SSL), especially if you are using Active Directory Integration, to encrypt passwords that would otherwise be sent to the Ektron CMS200/300 server as clear text.

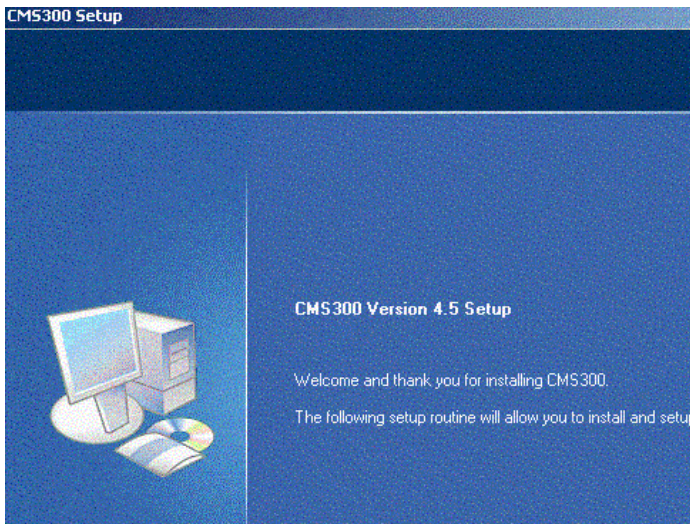
Configuring SSL can easily be performed. See ”SSL Support” on page 72 for more information.

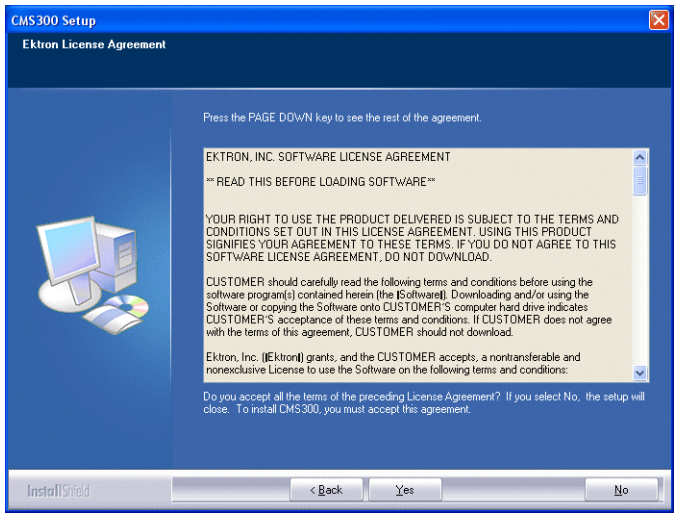
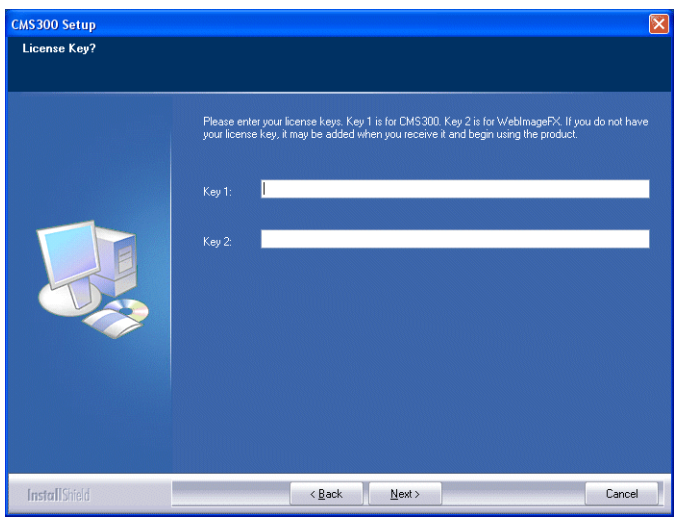
Performing the Install

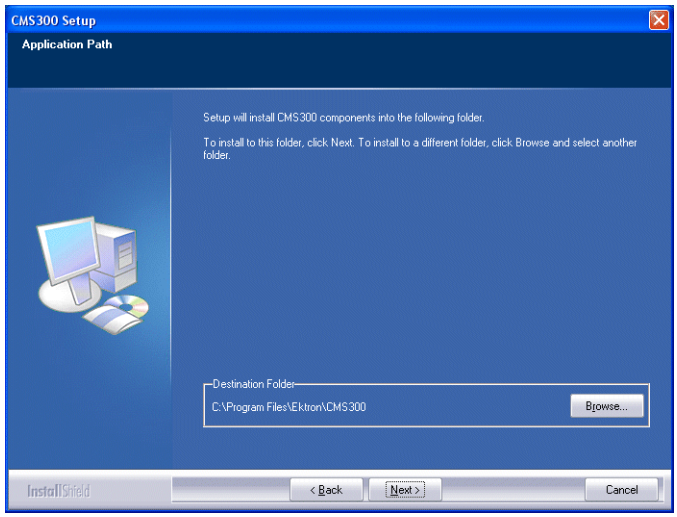
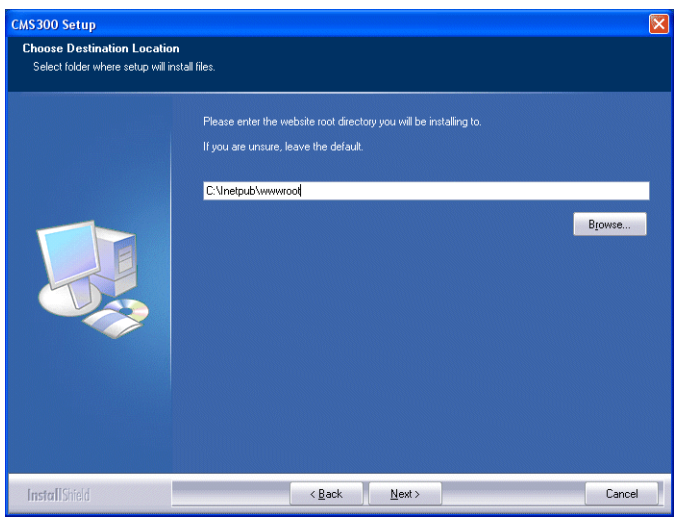
To install Ektron CMS200/300, begin by double clicking on the executable file that was downloaded from the Ektron Web site:

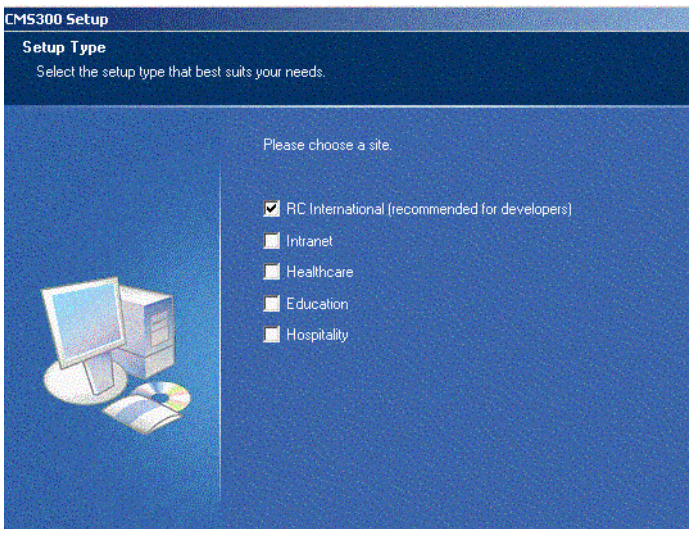
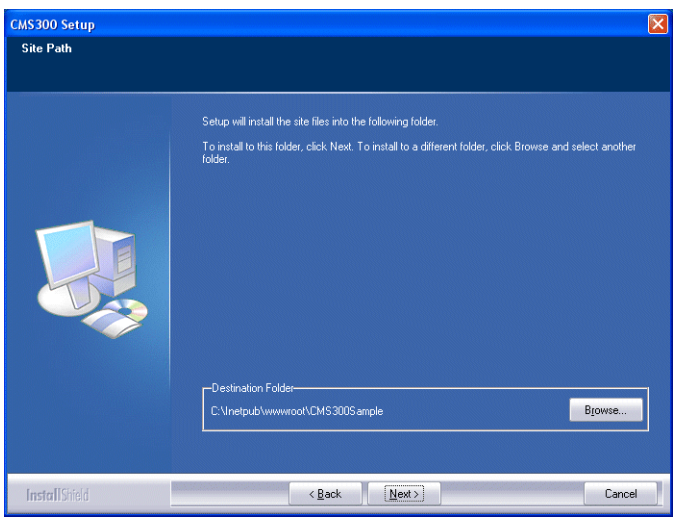
Running Ektron CMS200/300 Setup

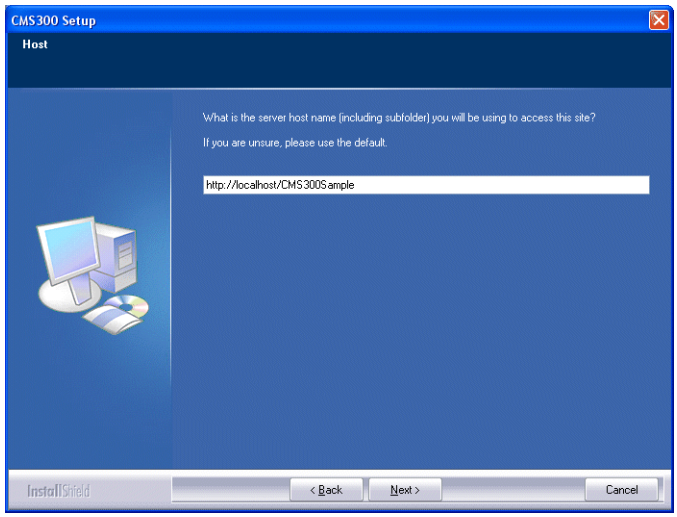
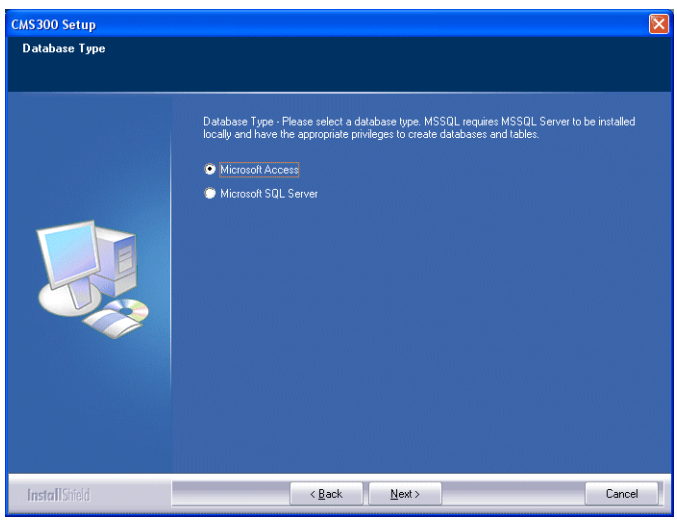
Once you have double clicked on the executable file for Ektron CMS200/300, the installation process will begin.

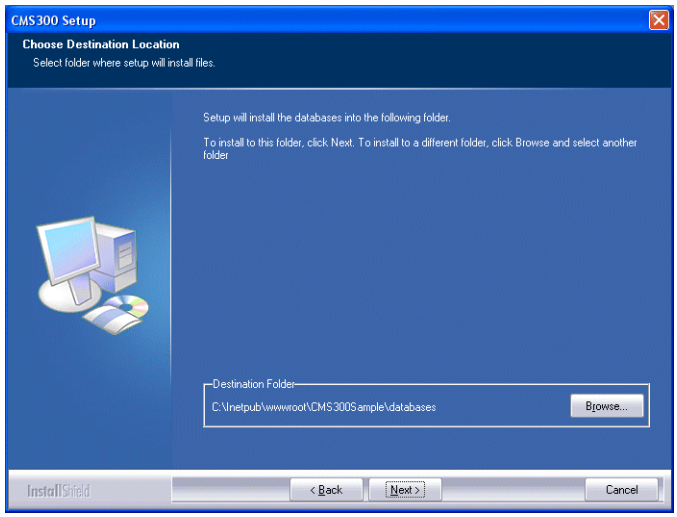
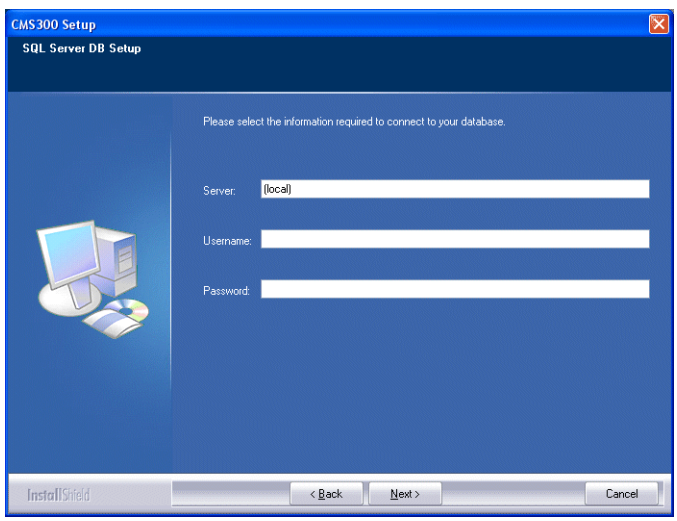
Step	Setup Screen
1. The following screen appears. Click **Next** (Next >) to proceed.	

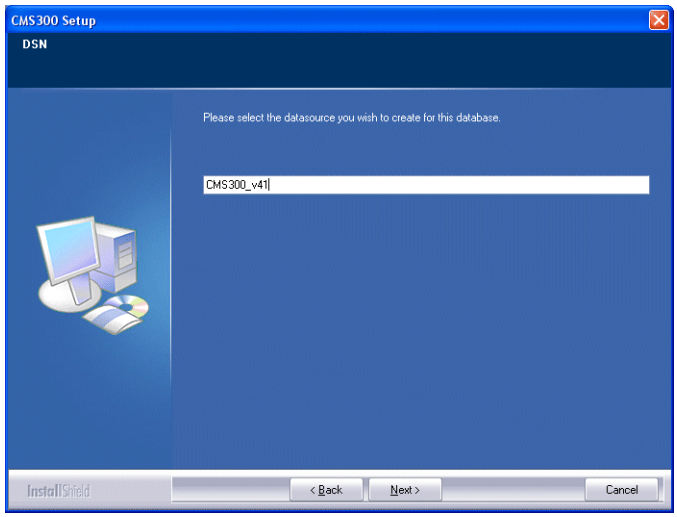
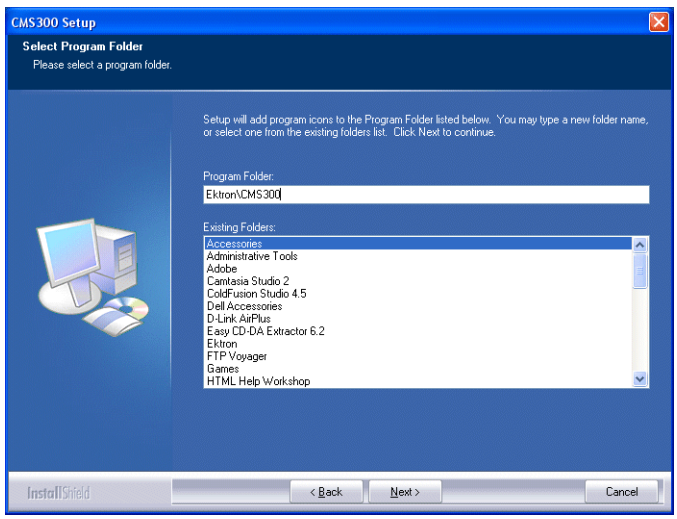
Step	Setup Screen
2. The next screen displays the Ektron License Agreement. Please read through the agreement. • Click **Yes** if you accept the terms of the agreement and continue. • Click **No** if you do not accept the terms of the agreement. Note: Clicking No ends the setup program.	
3. At the license key screen, enter your license key(s) for Ektron CMS200/300 and Ektron WebImageFX (if purchased) into the respective fields. Click **Next** (Next >) to proceed. If you do not already have a license key, click next to continue and refer to the Ektron CMS200/300 Administrator Manual for information about inserting a license key via the Administrator Workarea.	

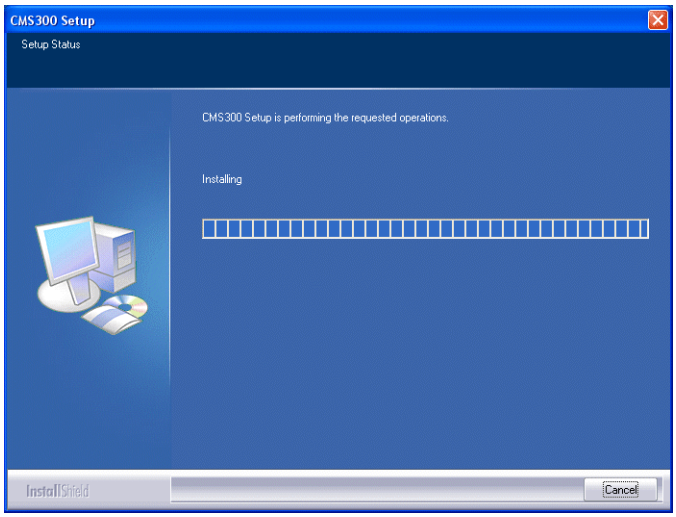
Step	Setup Screen
4. At the application path screen, you are prompted to specify the destination location for the Ektron CMS200/300 components and utilities. If desired, click the Browse button to specify a new location. Click **Next** (Next >) to proceed.	
5. At the choose destination location screen, specify the Web directory where you would like to install the Ektron CMS200/300 files to. Click **Next** (Next >) to proceed.	

Step	Setup Screen
6. At the choose sample sites screen, select the sample Web sites that you would like to install. Click **Next** (Next >) to proceed.	
7. You may specify where the site files will be installed on the server. To change the directory, click the browse button and locate the folder you wish to install the files to. Click **Next** (Next >) to proceed.	

Step	Setup Screen
8. At the Host screen, specify the host name you will be using to access your Ektron CMS200/300 Web site. The host name is used to define the URL that will be used to access your Ektron CMS200/300 Web site. It is also used to configure variables during the installation. The host name can be any of the following: • An IP address (123.456.7.890) • A server name (WebServer1234) • A domain name (www.ektron.com). Click **Next** (Next >) to proceed.	
9. At the database type screen, select the type of database you would like to setup for your Ektron CMS200/300 Web site. Click **Next** (Next >) to proceed. For information about using MySQL or Oracle as your Ektron CMS200/300 database, see "Ektron CMS200/300 Databases" on page 40.	

Step	Setup Screen
10. At the next screen, you need to specify information for the database. • If you have chosen MS Access as your database type, you need to specify the location where the database will be installed to at this screen. Click the Browse button to specify a different location for the database. Click **Next** (Next >) to proceed.	
• If you have chosen MS-SQL as your database type, you will need to specify the following: ◦ MS-SQL Server Name ◦ Username (if required) to access the MS-SQL Server ◦ Password (if required) of the username for the MS-SQL Server Click **Next** (Next >) to proceed.	

Step	Setup Screen
11. At the DSN screen, specify a DSN that will be used to connect to the database. Click **Next** (Next >) to proceed. Note: When the DSN is setup, the database type will be added to the end of the DSN you specify. (i.e. CMS200/300_v45_**Access** or CMS200/300_v45_**MSSQL**) Note: For information about setting up an OLE DB connection, see "DSN-less Connection" on page 77	
12. At the select program folder, specify the program folder in the Windows Start menu you would like to add the Ektron CMS200/300 information to. Click **Next** (Next >) to proceed.	

Step	Setup Screen
13. The setup program will now go through the process of installing all the necessary files. During this process, the installation grants the system user group, Everyone, write permissions to the following system folders: - \CMS200/300Sample\UploadedImages - \CMS200/300Sample\UploadedFiles - \CMS200/300Sample\Databases Upon completion of the installation, you should further configure your permissions based on your network security model before using Ektron CMS200/300.	
14. When completed, a completion message is displayed. To immediately access the Ektron CMS200/300 Sample Web site when you click the Finish button, check off the displayed box. Click **Finish** to complete the installation.	

Ektron CMS200/300 Hosting Example

To use Ektron CMS200/300 as a hosting solution, first install Ektron CMS200/300 according to the “Installing Ektron CMS200/300” chapter. Once that is complete, create separate directories for each hosted web site. The process is described below.

NOTE The following examples use a MS-Access database. If you are using MS-SQL, MySQL, or Oracle databases, the steps would be similar.

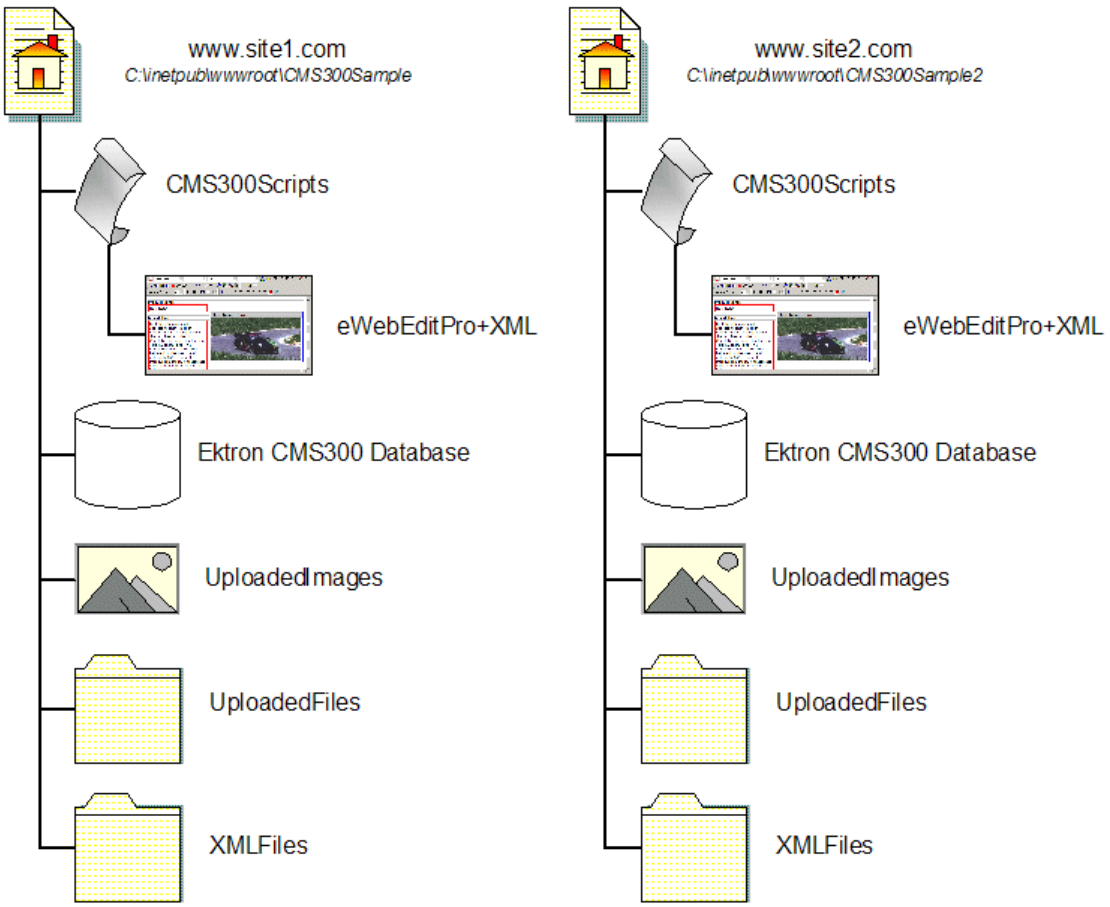
Running Ektron CMS200/300 Setup

Begin by installing Ektron CMS200/300 as described in ”Running Ektron CMS200/300 Setup” on page 24.

Setting up Directories

After you run the install, create new Web enabled directories for each of the web sites that will be hosted with Ektron CMS200/300.

1. Go to the \inetpub\wwwroot directory.
2. Create X amount of folders (depending on the number of sites that will be hosted using Ektron CMS200/300).
3. Name each folder uniquely.
4. Copy the contents of the **CMS200/300Sample** directory into each of the folders created.

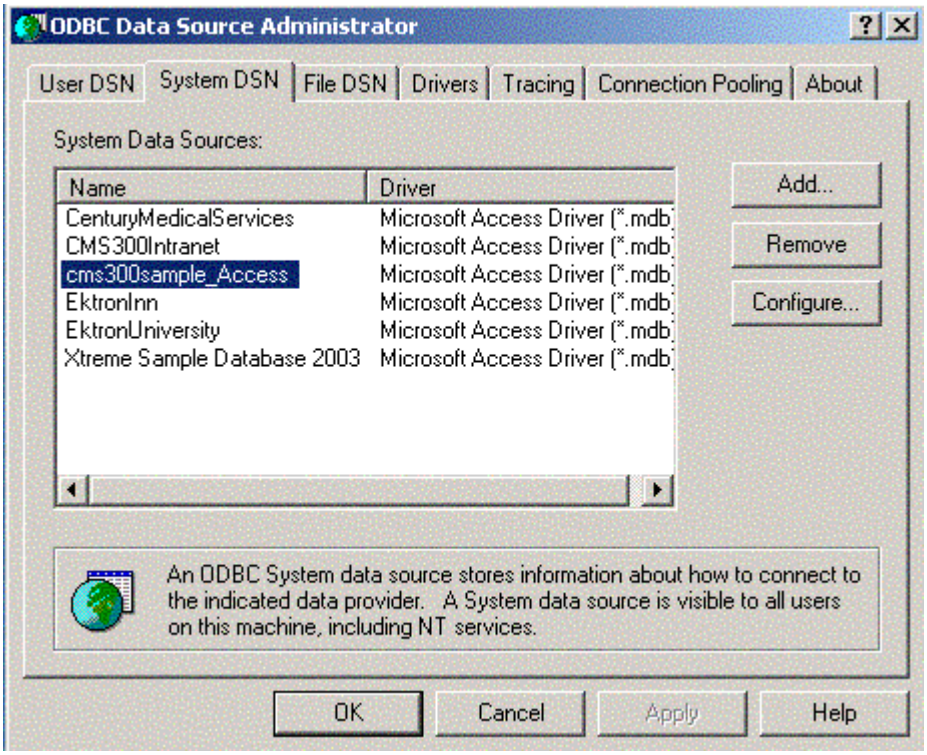


Creating DSNs

When finished copying the data into the directories, create unique DSNs for each of the sites.

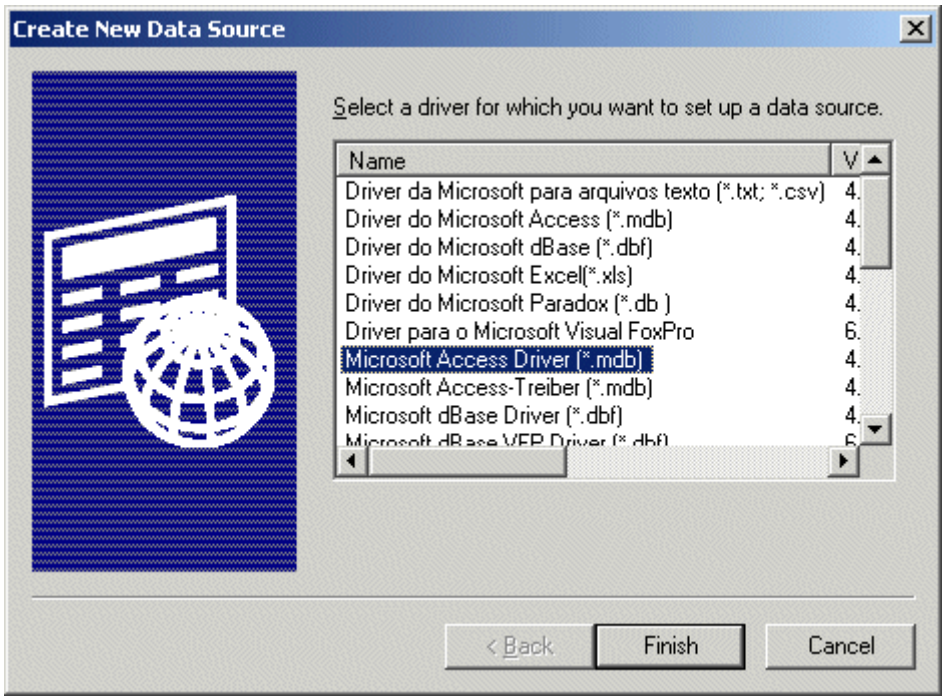
NOTE For information about using an OLE DB connection instead of an ODBC, see "DSN-less Connection" on page 77.

1. Follow the path **Start > Programs > Administrative Tools > Data Sources (ODBC)**
2. Click the **System DSN** tab

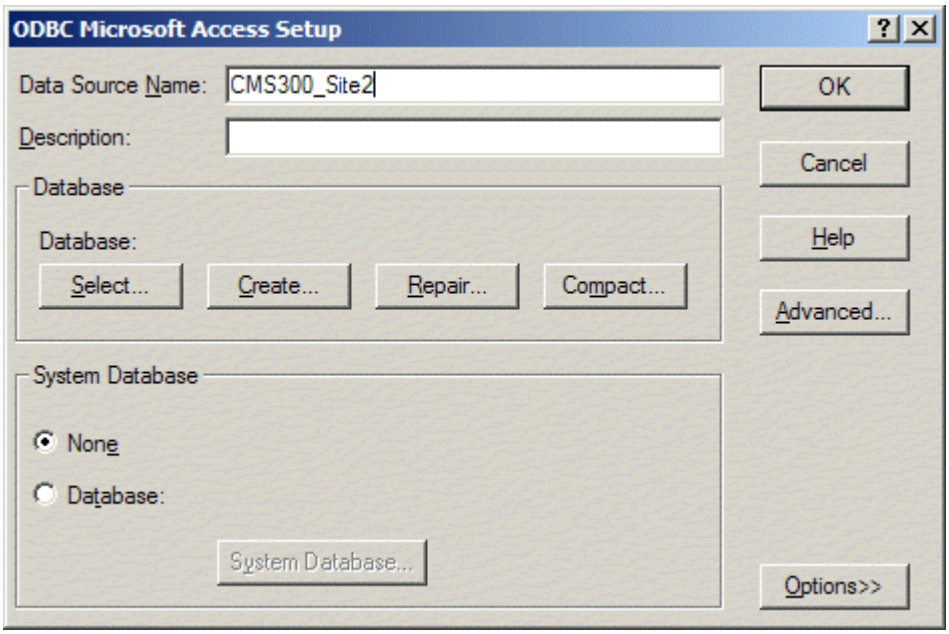


3. Click the **Add** button to add the Driver for the Database.

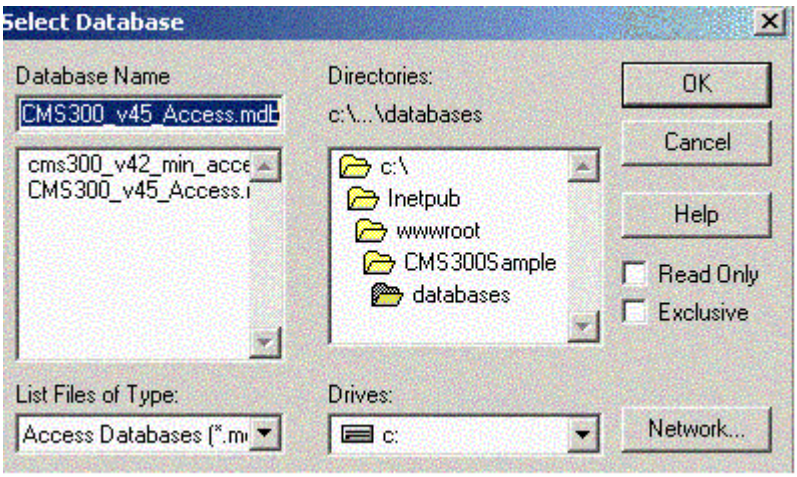
4. Select **Microsoft Access Driver (*.mdb)**



5. Click **Finish**
6. Enter a **Data Source Name**



7. Click the **Select** button
8. Explore until you find the proper database, then click **OK**



9. Click **OK** on the ODBC Microsoft Access Setup window

Repeat these steps for each Web Site that the server will be hosting, then click **OK** to exit the Data Source (ODBC) Manager.

Updating Site_Scripts_Path.xxx

Overview

All Ektron CMS200/300 templates must have an include that points to the file ApplicationAPI.xxx. This is necessary for the custom functions within the template to function properly.

Ektron recommends having a file in your Ektron CMS200/300 root directory that specifies this include file. Then, use the file that you have created in each of the templates. The file **Site_Scripts_Path.xxx** is an example of this.

Site_Scripts_Path.xxx is called by all templates in the Ektron CMS200/300 sample site. By further examining this file, you will notice that the file calls the correct applicationAPI.xxx file.

When configuring your Web sites, you have three options including:

- Update Site_Scripts_Path.xxx.
- Create new file.
- Insert include to ApplicationAPI.xxx in all templates.

NOTE Ektron does not recommend using the third option. If changes are made to the location of the file applicationapi.xxx, then all templates would have to be updated instead of making one change in one file.

Each of these options are explained in the following section.

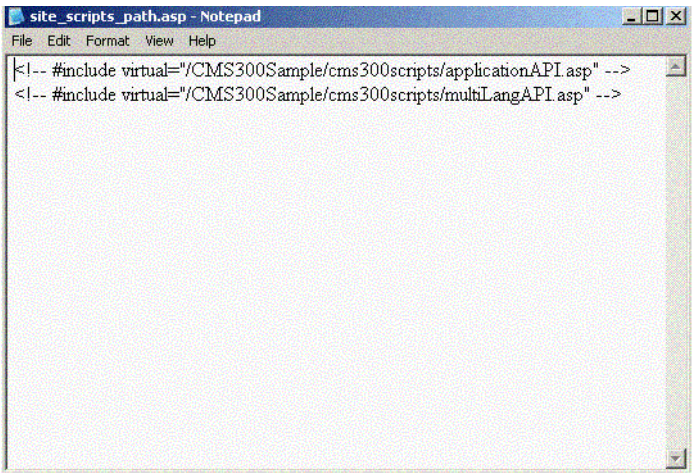
Updating Site_Scripts_Path.xxx

During the site creation process, if you have copied this file into your new site's root directory, you will need to update the path within the file to reflect the changes.

To update this file, perform the following steps:

1. Locate the file, Site_Scripts_Path.xxx in your new Web site's root folder.
2. Open the file for editing with your editing tool.

   The contents of the file are displayed.



3. Update the path within the quotation marks to reflect the new site path for your Web site, for example:

```
<!-- #include virtual="/NewSite1/cms300scripts/applicationAPI.xxx" -->
```

4. Save and close the file.
5. Repeat these steps for each new site you have set up.

Creating a New File

Instead of using the default file, site_scripts_path.xxx, you may create your own unique file and call the applicationAPI.xxx file through that.

To configure this file properly, perform the following steps:

1. Open any text editor (i.e. NotePad).
2. Enter the following text:

   ```
   <!-- #include virtual= “[filepath]” -->
   ```

   Where the file path is the relative location to the file ApplicationAPI.xxx.
3. Save the file to the root directory of the new site.

Updating Setup.xxx

Some code in the setup.asp file will need to be changed so each Web site will have the proper DSN and site path.

1. Go to the file: **C:\inetpub\wwwroot\NewSite1\CMS200/300scripts\setup.asp**, and open it with any web development tool.
   - Change DSN=”CMS200/300_v45_Access” to DSN=”*your new DSN*”
   - Change sitepath=”/CMS200/300Sample/” to sitepath=”/*your new sitepath*/”

   An example for this is:

```
DSN = "CMS200/300_Site2"
 ' Designate the database type below
 ' Vaild values are "mysql", "sql", "access", "Oracle", "Oracle8"
DBType = "access"
 DateFormat="dd-mmm-yyyy hh:mm AM/PM"
sitePath = "/CMS200/300Sample2/"
buildNumber = ""
 DBusername=""
 DBpassword=""
Version = ""
 UseSSL = false
 SSL_Port = 443
 ADEnabled = true
```

```
AUTH_Protocol = "LDAP"
```

2. Save the settings, and close the window.

Repeat these steps for each Web site that you will be hosting.

What's Next?

Once you have successfully created the DSNs for each site, and configured the setup.asp files, you will be ready to run each of these separate Web sites from your computer.

Ektron CMS200/300 Databases

Ektron CMS200/300 is compatible with the following types of databases:

- Microsoft Access
- Oracle 9i
- Microsoft SQL Server (7.0 and 2000)
- MySQL
- Microsoft MSDE 2000

Changing databases for your Ektron CMS200/300 Web site can easily be done using the utilities that Ektron provides in the installation.

This chapter explains the types of databases supported by Ektron CMS200/300, and how to convert to a MS-SQL, MySQL, or Oracle database.

Microsoft Access Databases

The Ektron CMS200/300 application contains two Microsoft Access databases. One is a sample database which contains sample data for a user to become familiar with the use and integration of the Ektron CMS200/300 content management tool. The other database is a minimum database that you may use to start your Web site from scratch, without the sample content and images.

Ektron CMS200/300 has the capability of using a MS SQL database. Although the product doesn't come with a MS SQL database ready, it is possible to convert the Access database to a MS SQL database by using the sql script and data mover included in the Ektron CMS200/300 installation. The steps are shown in the next chapter.

CMS200/300_v45_Access.mdb

The initial database for Ektron CMS200/300, is a Microsoft Access database. This is the database for the sample Web site. It contains users, user group, and content information.

- Two users - 1 Administrator, 1 Editor
- Sample Content
- Sample Images
- Fonts

NOTE You do not need Access installed on your system to use the sample database. However, you do need the MDAC and Jet Drivers listed in the system requirements.

Setting Up a MS-SQL Database

As mentioned before, Ektron CMS200/300 is compatible with a MS-SQL Database. To create the MS-SQL database, all you need to do is to run the **CMS200-300_mssql_v45.sql** script that is provided in the installation and a few other basic tasks. All this is described below.

Creating An Empty SQL Database

First, you must create an MS SQL database. To do this, follow these steps:

1. From the Windows start menu, open your MS-SQL Enterprise Manager.

   The MS-SQL Enterprise Manager opens.
2. Navigate through the `Console Root` folder and select the server that you want to add the database to.
3. **Right click** the database folder, and select **New Database...**

   The Database Properties dialog box is displayed.
4. Enter a name for the database (i.e. `CMS200/300_SQL`)
5. Click **OK**

   The page will be refreshed and the database you just added is displayed on the right side of the screen.
6. Close the Enterprise Manager.

Running the SQL Script

The.sql script that is provided with Ektron CMS200/300 will create all the necessary tables in the newly created MS-SQL database for Ektron CMS200/300.

The script is in the c:\Program Files\Ektron\CMS200/300\Utilities\ directory as **CMS200-300_mssql_v45.sql**. To access it and run it properly, follow these steps:

1. From Windows Start menu, open your MS-SQL Query Analyzer.

   The MS-SQL Query Analyzer opens and the Connect to SQL Server dialog box is displayed.
2. Select the server that you used to create the Ektron CMS200/300 database on, and enter the type of Authentication that you are using to connect to the SQL Server.
3. Click **OK**

   The Connect to SQL Server dialog box closes, and you are now logged in.
4. Select the new database that was created earlier (CMS200/300_SQL) from the drop down list at the top of the screen.
5. Load the sql script by selecting **Open File** either from the toolbar, or from the File menu.

   The Open Query File dialog box is displayed.
6. Browse for the file **CMS200-300_mssql_v45.sql**.

NOTE If you ran the default installation, you can find the script in the **C:\ProgramFiles\Ektron\CMS200/300\Utilities** directory.

7. When you have located the.sql script, select it and click **Open**.

   The Open Query File dialog box closes and the script is loaded into the query field.
8. Click the green arrow on the toolbar, press <F5>, or select the execute command from the Query menu, to run/execute the script.

   The script executes and a confirmation message that **the command(s) completed successfully** is displayed.
9. Close the SQL Query Analyzer

You now have a blank SQL database for Ektron CMS200/300.

Creating New DSN

Because you will now be using a MS-SQL database, you need to create a new DSN that will point to this new database. This can easily be done by going into the ODBC Manager and pointing the DSN to the new MS-SQL database.

NOTE For information about creating a DSN-less connection to the MS-SQL database for Ektron CMS200/300, see "DSN-less Connection" on page 77.

1. Access the ODBC Manager from the Control Panel on your system.

   The ODBC Data Source Administrator snap-in is displayed.

2. Click the **System DSN** tab.

   A list of system data sources are displayed.

3. Click **Add**.

   The Create New Data Source window is displayed.

4. Select the driver that best suits your version of MS-SQL server then click **Finish**.

   The Create a New Data Source to SQL Server window opens.

5. Specify a name, description, and choose the SQL Server to connect to, then click **Next >**

   The next screen in the wizard is displayed.

6. Enter the necessary information about the authentication for the DSN then click **Next >**

   The next screen in the wizard is displayed.

7. Change the default database to the one that you created earlier, make any other adjustments at this screen if necessary, then click **Next >**

   The next screen in the wizard is displayed.

8. Choose which ever options you would like for the DSN, then click **Finish**.

   The ODBC Microsoft SQL Server Setup window is displayed with a summary of your settings.

9. Click **Test Data Source** to verify the data source.

   If the DSN is good, you will receive a message that the test completed successfully. If not, edit the DSN and make sure that everything is set up properly.

10. To finish, click the **OK** button at the bottom of the screen, and close the ODBC Manager.

After you create the database, the script has run, and the ODBC connection is made, you are ready to run the data mover, which moves content from the default Access database to the new MS-SQL database.

Moving the Data

The data mover move everything in the current Access database to the MS-SQL database. To move the data, perform the following steps:

1. Double click the **dbmover.exe** file which is located in the C:\Program Files\CMS200/300\utilities directory.

   The Ektron CMS200/300 Data Mover Utility opens.
2. In the source DSN section, select the source database from the drop down list.
3. Enter a username and password needed to access the DSN if required in the specified fields.
4. Select the type of database the selected DSN is.
5. In the destination DSN section, select the destination DSN from the drop down list.
6. Enter a username and password needed to access the DSN if required.
7. Select the type of database the destination DSN is.
8. When complete, click the **Update** button to move the data.

   A message is displayed when the content is successfully moved.

Modifying Setup.xxx

Once you have performed the steps described so far, you need to update your Setup.XXX files to reflect the changes that have been made.

Displayed here is a list of the changes that need to be made:

- Specify MS-SQL as the DBType
- Specify new DSN
- If required, enter a username and password required to access the database.

This section explain how to make these required changes.

Updating Setup.xxx Files

To update the setup.xxx files, perform the following steps:

1. Begin by opening the following files for editing:
   - CMS200/300sample/CMS200/300scripts/setup.asp
   - CMS200/300sample/CMS200/300scripts/setup.aspx
   - CMS200/300sample/CMS200/300scripts/setup.php
   - CMS200/300sample/CMS200/300scripts/setup.cfm

NOTE Setup.asp is used for demonstration purposes, the contents of Setup.ASPX/PHP/CFM are almost identical.

2. Use the following table to make the necessary modifications to the Setup.xxx file.

Line	Description	More Information
DSN	Replace with the DSN that points to the MS-SQL database.	"Creating New DSN" on page 44
DBType	Replace the current DBType with **DBType="sql"**	
Username	If required, specify the username needed to connect to the DSN.	
Password	If required, specify the password for the username given.	

3. When you are finished making the necessary changes to the setup.xxx file, save and close the file.

NOTE Although you may not be using other platforms for your Ektron CMS200/300 Web site, Ektron recommends making the change described above to all Setup.XXX files.

What's Next?

Now that you have performed all the steps needed to successfully configure Ektron CMS200/300 to use an MS-SQL Database, you can now use your Ektron CMS200/300 Web site!

Setting Up a MySQL Database

As mentioned before, Ektron CMS200/300 is compatible with a MySQL database. To configure Ektron CMS200/300 to use a MySQL database, you will need to perform a few basic tasks. All this is described below.

Requirements

- Windows NT/2000
- Stable version of MySQL (3.23 or higher recommended) (http://www.mysql.org)
- MySQL ODBC driver (3.51or higher recommended) (http://www.mysql.org)
- Ektron CMS200/300 v1.6 or higher (earlier version will **not** work)

NOTE The latest versions of MySQL databases and drivers can be found at the following Web site: http://www.mysql.org.

Connecting to MySQL

1. First locate and open the DOS command prompt on your Windows machine.

NOTE If your DOS prompt opens with a prompt for a drive different than the one MySQL is installed to, change to the correct drive. Typing the correct drive followed by a colon can do this: **D:\> C:**

2. From the prompt for the drive in which MySQL is installed, use the **cd** command to switch to the directory where MySQL is installed.

   C:\> cd mysql\bin

   This will take you to a prompt for the correct directory.

3. From here, start MySQL by typing **mysql** at the command prompt.

   C:\mysql\bin>mysql

You should be greeted with the MySQL Monitor Welcome Screen, which provides a connection id and tells you the server version of MySQL that you have.

After you connect to MySQL, you can create the database that Ektron CMS200/300 will use.

Creating the Database

Let's create a database in MySQL named CMS200/300_MySql.

NOTE The database does not have to be named CMS200/300. If you prefer to name it something else, just remember that name because you will need it when we run the script to build the tables.

1. At the MySQL prompt, enter the following to create the database named CMS200/300_MySql.

   mysql> create database CMS200/300_MySql;

2. MySQL should respond by stating something like:

   Query OK, 1 row affected <0.03 sec>.

3. To make sure the database was successfully created you can type **show databases** at the mysql prompt.

   mysql> show databases;

   This command prints a list of MySQL databases. Make sure CMS200/300_MySql appears on this list.

NOTE If the newly created database does not display, run the create statement again.

4. Attempt a connection to the new database using the connect command.

   mysql> connect CMS200/300_MySql;

   A successful connection is greeted with a connection id.

5. Once you make a connection, type **exit** to get out of MySQL.

   mysql>exit;

After you create the database in MySQL, you can build the tables using the script provided by Ektron.

Building the Ektron CMS200/300 Tables

To build the CMS200/300 tables, run the script provided by Ektron named **CMS200-300_mysql_v45.sql**.

NOTE You cannot run the script from the mysql prompt. This is why we exited from the MySQL monitor in the last step.

1. At the command prompt, type:

- **mysql**
- the database name
- a less than sign (**<**)
- the location to the SQL script

NOTE You can also drag and drop the file so you do not have to type it out. Do not put a semicolon at the end of this command.

Here is an example of how the line might look:

C:\mysql\bin>mysql CMS200/300_MySql< “c:\program files\ektron\CMS200/300\utilities\CMS200-300_mysql_v45.sql

If the script ran correctly, MySQL gives you no feedback. It returns to the prompt from which you ran the script. If MySQL prints a bunch of information, you can assume something went wrong.

2. To see if the script ran correctly, access the database and request the list of tables created. Use the following commands to do this:

C:\mysql\bin>mysql ↵
mysql> connect database name; ↵
mysql> show tables; ↵

If the script ran correctly, MySQL outputs a list of the tables that were created.

After the tables are created in the MySQL database, you are ready to move the content from the existing database to this one. Before you can do that, you must create a DSN for the new MySQL database.

Creating a DSN for the MySQL Database

Both databases (the Access 2000 and MySQL) needs a data source set up. To create the second data source, you need a utility to connect to a MySQL database through an ODBC connection. It can be found at:

http://www.mysql.com/downloads/api-myodbc.html

Use the MySQL driver installed from the MySQL-ODBC utility when creating this System DSN. In the example below, we choose **CMS200/300_MySql** as the data source name for our MySQL database. The following steps describe the process.

1. Access your ODBC Datasource Administrator console by following the path in Windows:

   Start > Programs > Administrative Tools > Data Sources (ODBC)
2. The ODBC Data Source Administrator snap-in appears.
3. Click the **System DSN** tab.
4. A list of your system data sources are displayed.
5. Click **Add...**
6. The Create New Data Source window opens.
7. Choose **MySQL ODBC 3.51 Driver** from the list of available drivers then click **Finish.**
8. The MySQL ODBC DSN Configuration window appears.
9. Enter the following information into the displayed fields:
   - Datasource Name
   - Database Name
   - Username and Password (if required)
   - Host Name

NOTE For demonstration purposes, we will name the DSN CMS300_MySQL, and point it to the database we created earlier called CMS300_MySql.

10. Click **Test Data Source** to test the connection. If the information is correct, a success message appears.
11. Click **OK**.

NOTE If you receive an error, check your connection information. If problems persist, refer to your **MySQL Documentation** for troubleshooting.

12. At the DSN Configuration window, click **OK** to save and close the changes.

With the creation of the DSN for the Ektron CMS200/300 MySQL database complete, you are ready to move the content from the default MS Access database to this one.

Moving Data into the MySQL Database

The next step in setting up a MySQL database is to run the data mover that also gets installed with Ektron CMS200/300. The data mover moves everything in the current Access database to the MySQL database.

To move the data:

1. Double-click the `C:\Program Files\\Utilities\dbmover.exe` file to open it.
2. The Ektron CMS200/300 Data Mover Utility opens.
3. Choose the Source DSN from the drop down list.
4. Enter a username and password for the source DSN in the proper fields if necessary.
5. Choose **Access** as the DB Type for the source DSN.
6. Next, from the lower drop down list, choose the Destination DSN for the database to which the content will be moved.
7. Enter a username and password for the destination DSN in the proper fields if necessary.
8. Next, choose the DB type for the Destination DSN.
9. After you enter necessary information for the CMS Data Mover, click **Update** to initiate the move.

NOTE If the data did not populate or you received an error, please review your data sources and their connection information.

Modifying Setup.xxx

After performing the steps described so far, you need to update your Setup.XXX files to reflect the changes. Here is a list of changes to be made:

- Specify MySQL as the DBType
- Specify new DSN
- If required, enter a username and password required to access the database.

This section explains how to make these changes.

Updating Setup.xxx Files

To update the setup.xxx files, perform the following steps:

1. Open the following files for editing:
   - CMS200/300sample/CMS200/300scripts/setup.asp
   - CMS200/300sample/CMS200/300scripts/setup.aspx
   - CMS200/300sample/CMS200/300scripts/setup.php
   - CMS200/300sample/CMS200/300scripts/setup.cfm

NOTE Setup.asp is used for demonstration purposes. The contents of Setup.ASPX/PHP/CFM are almost identical.

2. Use the following table to make the necessary modifications to the Setup.xxx file.

Line	Description	More Information
DSN	Replace with the DSN that points to the MySQL database.	”Creating a DSN for the MySQL Database” on page 51
DBType	Replace the current DBType with **DBType=”mysql”**	
Username	If required, specify the username needed to connect to the DSN.	
Password	If required, specify the password for the username given.	

3. Save and close the setup.xxx file.

NOTE Although you may not be using other platforms for your Ektron CMS200/300 Web site, Ektron recommends making the change described above to all Setup.XXX files.

What's Next?

After configuring Ektron CMS200/300 to use an MySQL Database, you can use your Ektron CMS200/300 Web site!

Setting Up an Oracle 9i Database

Ektron CMS200/300 can be configured to use an Oracle 9i database. To properly configure Ektron CMS200/300 and Oracle9i, perform these steps.

1. ”Creating Necessary Tables” on page 56
2. ”Creating New DSN” on page 58
3. ”Modifying Setup.xxx” on page 61

The following sections explain the steps.

Before You Begin...

Before you begin, read this section to understand the methods and test configuration used for this sample.

Test Configuration

The test machine used in this section is configured as follows:

- Microsoft Windows 2000 Server, Service Pack 3
- Oracle 9i Database (Release 9.2.0.1.0)
- SQL*Plus: Release 9.2.0.1.0
- Oracle 9i ODBC Driver

While this configuration is only a suggested one, it was used by Ektron to successfully use an Oracle database for Ektron CMS200/300.

Configuration Procedure

This section provides one approach for setting up and configuring an Oracle database for Ektron CMS200/300. As an Oracle administrator, you may prefer another method that is more appropriate for your needs.

Case Sensitivity

Ektron highly recommends configuring the Oracle database to be case insensitive. Not doing so may result in the creation of duplicate content titles, as well as other problems.

Creating Necessary Tables

The.sql script provided with Ektron CMS200/300 creates the necessary tables in your oracle database. The script is in the `c:\Program Files\Ektron\CMS200/300\Utilities\` directory as **CMS200-300_oracle_v45.sql**.

Building Tables in Your Oracle Database

To access the script and execute it properly, follow these steps:

1. Open SQL Plus Worksheet by following the path in the Windows Start menu:

   Start > Programs > Oracle - OraHome92 > Application Development > SQL Plus Worksheet
2. The Oracle Enterprise Manager Login box is displayed.
3. Choose the option to connect directly to a database, and use the following table to help you complete this login box.

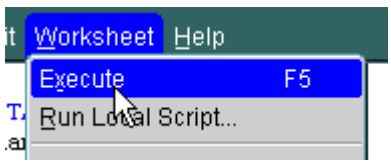
Field	Description
Username	Enter your Oracle Enterprise Manager administrator name for the Oracle Management Server. Note that you are logging in as an administrator of network resources being serviced by a Management Server, not into a database as a database user.
Password	Enter your administrator password for the Oracle Enterprise Manager system.
Service	Type in or select the name of the node from which the Oracle Management Server is running.

4. Click **OK** to connect.
5. The SQL Plus Worksheet" interface is displayed.

6. Follow the path **File > Open** to open the Ektron CMS200/300 Oracle SQL script.
7. The Open Local Script FIle box opens.
8. Locate and click the script CMS200-300_oracle_v45.sql, then click **Open**.

NOTE By default, this script is installed to `Program Files/Ektron/CMS300/Utilities.`

9. The script is loaded into the SQL Plus Worksheet.
10. Execute this script by:

	Pressing **<F5>**
	Clicking **Execute**.
	Following the path **Worksheet > Execute**

11. Upon completion of the script, all necessary tables for the database are added.

All the required tables are now added to your Oracle database.

Testing the Script

Once the script has been executed, perform the following steps to ensure that the tables have been added to your Oracle database properly.

1. Access the Oracle Enterprise Manager by following this path in the Windows Start Menu:

   Start > Programs > Oracle - OraHome92 > Enterprise Manager Console.
2. The Oracle Enterprise Manager Console Login box appears.
3. Choose **Launch Standalone** and click **OK**.

4. The Oracle Enterprise Manager, Standalone window is displayed on the screen.
5. In the folder tree on the left side of the console, expand the database folder, then expand the service the Ektron CMS200/300 sql script was applied to.
6. A Database Connect Information window is displayed in the console.
7. Enter your Oracle Username and Password into the displayed fields, then click **OK**.
8. You are now connected to the service, and the folder tree expands with a list of information about the service.
9. To locate the tables that were added, follow the path in the folder tree:

   Schema > [Username] > Tables

   A list of tables added during the execution of the sql script appear on the right side of the console. Be sure that all 51 tables have been added.

Creating New DSN

Because you are now using an Oracle database, you need to create a new DSN that points to it. To do this, go into the ODBC Manager and point the DSN to the new ODBC database.

NOTE For information about creating a DSN-less connection to the Oracle database for Ektron CMS200/300, see "DSN-less Connection" on page 77.

To create a DSN for your Oracle Database, perform the following procedure.

1. Access the ODBC Datasource Administrator.
2. Click the **System DSN** tab at the top of the console.
3. A list of all the system datasources is displayed.
4. Click **Add.**
5. The Create New Datasource window is displayed.
6. Choose the driver that best suits your needs.
7. Click **Finish**.

8. The Oracle ODBC Driver Configuration window is displayed on the screen.
9. Using the following table, enter the necessary information into the fields.

Field	Enter
Datasource Name	A name for this datasource.
Description	An extended description for the DSN.
TNS Service Name	(or select from the list) the proper TNS Service for your DSN.
User ID	A Username with access permissions for the Oracle Database.

NOTE With the exception of **Description**, the fields in the table above are required for a successful connection. You may set other advanced settings for the DSN, but this manual only uses the basic default settings.

10. Click **Test Connection** on the right side of the console to ensure that you can connect to the database.
11. The ODBC Driver Connect window is displayed.
12. Ensure the service name and Username are correct, then enter the password for the specified user in the password field,
13. Click **OK**.

If connected successfully, a confirmation message is displayed.

NOTE A message other than **Connection Successful** may be due to an invalid username, password, connection, or service. Be sure that all your information is correct, then try again.

14. Click **OK** on the testing connection window to close it.

    The Oracle ODBC Driver Configuration page is now active again.
15. Close the Oracle ODBC Driver Configuration window by clicking **OK**.
16. Close the ODBC Datasource Administrator window by clicking **OK**.

Moving the Data

The next step in setting up an Oracle database is to run the data mover that gets installed with Ektron CMS200/300. The data mover moves everything in the default Access database to the Oracle database.

To move the data:

1. Double click the dbmover.exe file, located in the `Program Files/Ektron/CMS200/300/utilities` directory.
2. The Ektron CMS200/300 Data Mover Utility opens.
3. Use the following tables to successfully enter the correct information into the proper fields.

Source Database Information	
Field	**Description**
DSN	Type in, or choose from the list above, the DSN for the source database from which content will be extracted.
User:	If required, enter a username for the DSN to connect to the database.
Pass:	Enter the password for the username given.
Type:	From the list, choose the type of database the source database is.
Service:	If the source database type is Oracle, type in the name of the node from which the Oracle Management Server is running.

Destination Database Information	
Field	**Description**
DSN	Type in, or choose from the list above, the DSN for the destination database to which content will be moved.
User:	If required, enter a username for the DSN to connect to the database.

Destination Database Information	
Field	**Description**
Pass:	Enter the password for the username given.
Type:	From the list, choose the type of database the destination database is.
Service:	If the source database type is Oracle, type in the name of the node from which the Oracle Management Server is running

4. Click the **Update** button to move the data from one database to another.
5. A message appears when the content is successfully moved.

NOTE Receiving a message other than a success message means that your information is incorrect. Recheck all data, and retry.

Modifying Setup.xxx

After completing the steps described above, update your Setup.XXX files as follows:

- Specify Oracle as the DBType
- Specify DSN
- Enter username and password needed to access the Oracle Database
- Specify the Oracle Service being used by Ektron CMS200/300

This section explains how to make these changes.

Updating Setup.xxx Files

To update the setup.xxx files, perform the following steps:

1. Open the following files for editing:
    - CMS200/300sample/CMS200/300scripts/setup.asp
    - CMS200/300sample/CMS200/300scripts/setup.aspx

- CMS200/300sample/CMS200/300scripts/setup.php
- CMS200/300sample/CMS200/300scripts/setup.cfm

NOTE Setup.asp is used for demonstration purposes. The contents of Setup.ASPX/PHP/CFM are almost identical.

2. Use the following table to change the Setup.xxx file.

Line	Description	More Information
DSN	Replace with the DSN that points to the Oracle database.	”Creating New DSN” on page 58
DBType	Replace the current DBType with: **DBType=”Oracle”**	
Username	Specify the username needed to connect to the DSN.	”Username” on page 56
Password	Specify the password for the username given.	”Password” on page 56
OracleSvr	Enter the proper Oracle service.	”Service” on page 56

3. After making the changes to the setup.xxx file, save and close it.

NOTE Although you may not be using other platforms for your Ektron CMS200/300 Web site, Ektron recommends making the change described above to all Setup.XXX files.

What’s Next?

Now that you have configured Ektron CMS200/300 to use an Oracle database, you can use your Ektron CMS200/300 Web site!

Configuring Ektron CMS200/300

This chapter contains extra information about how to further configure your Ektron CMS200/300 application. The topics that are discussed include:

- ”Configuring E-Mail Notifications” on page 64
- ”SSL Support” on page 72
- ”DSN-less Connection” on page 77

Configuring E-Mail Notifications

An email is sent to notify users when a task (such as approving a content block or submitting a form) was performed or needs to be performed. This section explains the steps needed to use Microsoft's SMTP service to enable e-mail notification in Ektron CMS200/300.

CDOSYS

To process email, **Ektron CMS200/300** uses the CDOSYS model. Using the Simple Mail Transport Protocol (SMTP) and the Network News Transfer Protocol (NNTP) standards, CDOSYS enables applications based on Windows XP, Windows 2000 or Windows 2003 to efficiently route e-mail and USENET-style news posts across multiple platforms.

CDOSYS, the successor to CDONTS, is as easy to use as CDONTS but is more powerful by letting authors create and view sophisticated emails using html and data sources.

NOTE If the SMTP Server does not find CDOSYS installed on the system that is processing email, it looks for CDONTS and tries to use that as a mail server protocol.

Set up SMTP Server

For CDOSYS to work, set up the SMTP server on your local system (to which you installed **Ektron CMS200/300**) or a remote system that will send and receive emails.

NOTE To access an SMTP server on a local or remote system, consult the system administrator who manages email in your organization. This administrator may not be the same as the Ektron CMS200/300 administrator.

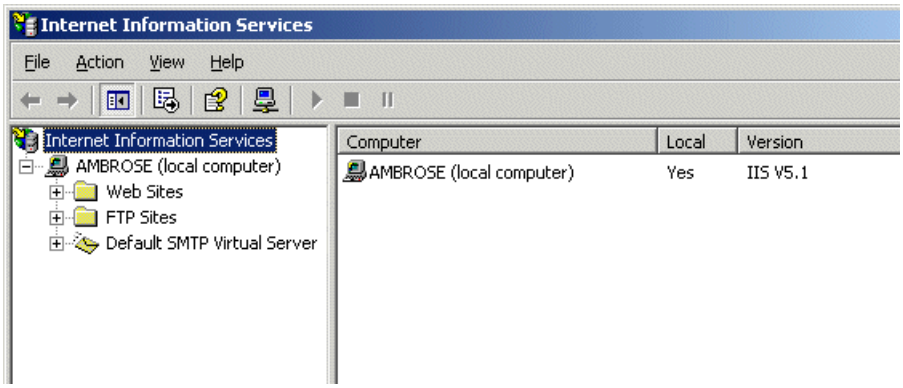
After the SMTP server is set up, configure it as described in "Verification for Relay" on page 65.

Verification for Relay

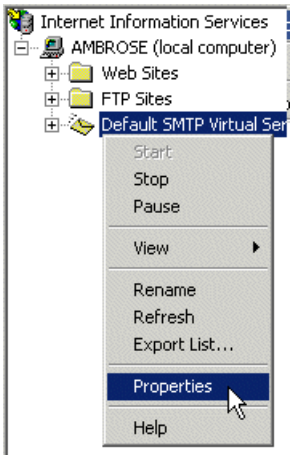
To verify that your Ektron CMS200/300 Web server's IP address supports relay through your SMTP server, follow these steps.

NOTE The WWW and SMTP components of IIS must be installed on the Web server to which Ektron CMS200/300 is installed.

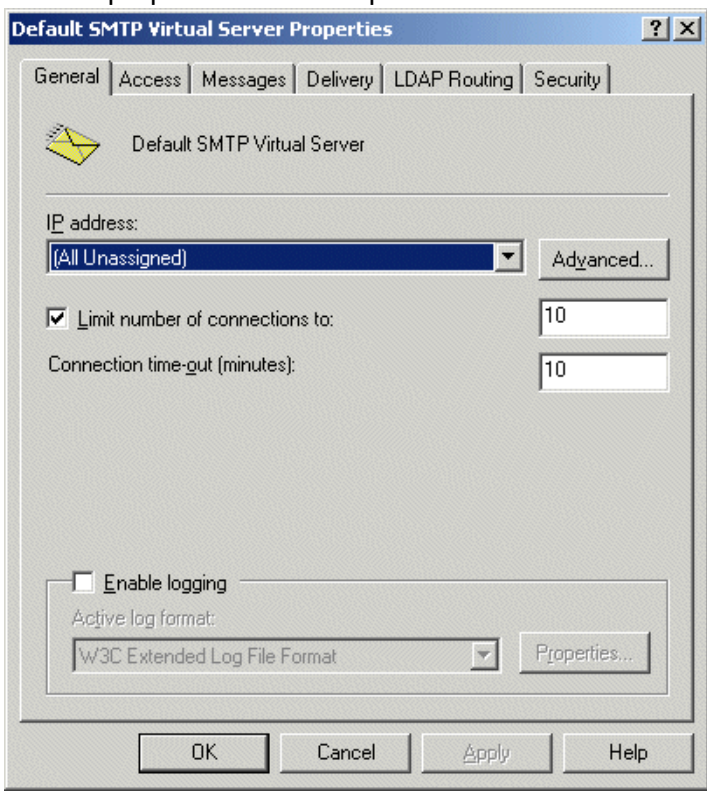
1. On your SMTP server, access your Internet Services Manager in the Administrative Tools.



2. In the IIS Management Console, select the SMTP virtual server, and then click **Properties** on the Action menu.

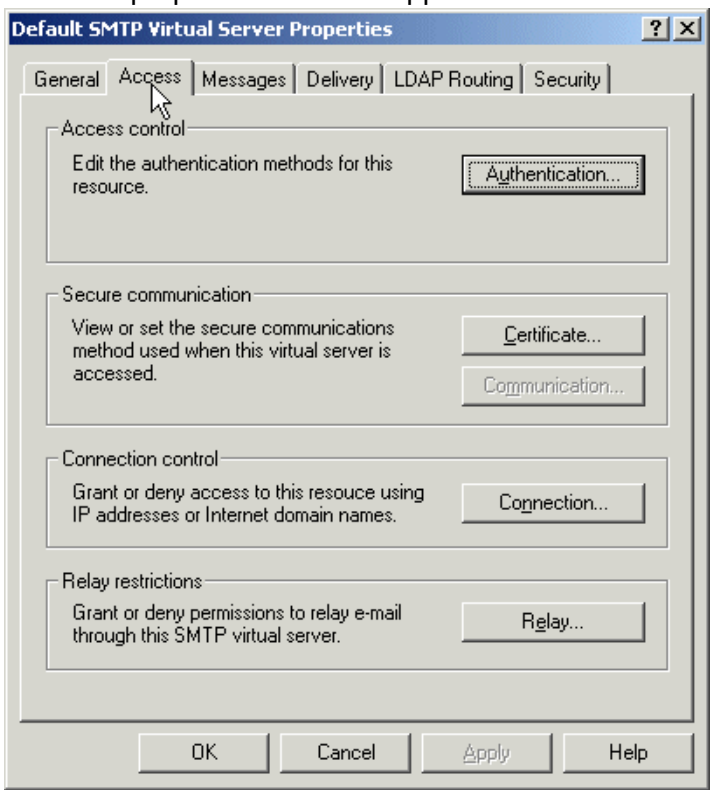


3. The SMTP properties window opens.



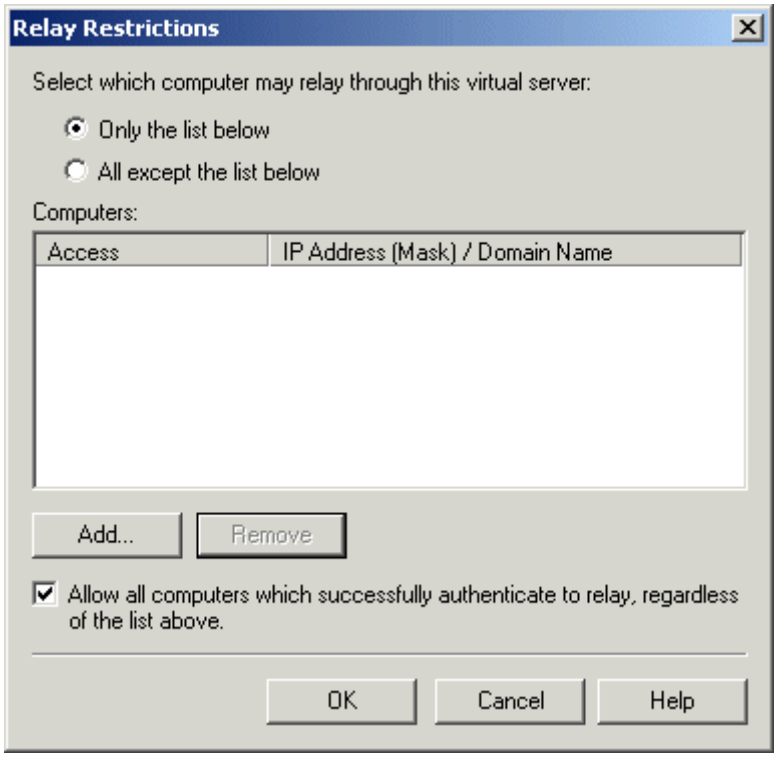
4. In the properties window, click the **Access** tab

5. The access properties windows appears.



6. In the Relay Restrictions section, click the **Relay...** button.

7. The Relay Restrictions window opens. Set or remove relay restrictions.



NOTE For more information, see "Setting or Removing Relay Restrictions from a Virtual Server" from this Web page: <http://www.microsoft.com/WINDOWS2000/en/professional/help/moc04_57.htm>

Customizing Ektron CMS200/300 to Work with CDOSYS

Before using CDOSYS with SMTP to process email, make the following changes to Setup.XXX file.

1. Open `CMS200/300sample/CMS200/300scripts/setup.aspx` for editing.
2. Navigate to the section that says

```
 ' CDOSYS required for use of SMTP. Can be local or remote.
SMTPServer = "localhost
SMTPPort = 25
```

```
SMTPUser = ""
SMTPPass = ""
```

3. Using the following table, complete the information in setup.xxx file.

Specify	See this section
SMTP Server name	”SMTPServer” on page 69
SMTP Port number	”SMTPPort” on page 69
SMTP username	”SMTPUser” on page 70
SMTP password	”SMTPPass” on page 70

SMTPServer

Find out how the SMTP server is set up in your work environment. There are two ways to set it up.

- **Locally** - To set up the SMTP server on your local system, install IIS on your local system. See your System Administrator for details.

  A local SMTP server can be any of these:

  ```
  SMTPServer= “localhost”
  SMTPServer= “127.0.0.1”
  SMTPServer= “myname”
  ```

- **Remotely** - You set up SMTP server on a remote system. See your System Administrator for details.

  The SMTP server on a remote system can be something like this:

  ```
  SMTPServer= “smtp.yourserver.com”
  SMTP Sever= “yourserver.com”
  ```

SMTPPort

When setting up a mail server, you need to specify the port number used to retrieve email. In most cases, the port is 25. If that is not the case for you, see your Systems Administrator for more details.

For example: `SMTPPort = 25`

SMTPUser

The username used by the SMTP server to send and receive emails. You do not need a username when using a local SMTP server. Check with your Systems Administrator for details.

However, when using a remote system for accessing emails, you must provide an authenticated username before sending or receiving email. Often, the username is an email address, such as `SMTPUser = "yourname@companyname.com"`.

SMTPPass

A password is set up to allow the SMTP server to process email. By default, **Ektron CMS200/300** only accepts the password in an encrypted form.

To encrypt the password, Ektron provides a utility called **EncryptEmailPassword.exe**, which resides in the `C:\Program files\Ektron\CMS300\Utilities` folder.

Using the Encrypt Email Password Utility

To use the EncryptEmailPassword.exe utility, follow these steps.

1. Run EncryptEmailPassword.exe.
2. The Encrypt utility window appears.

3. In the **Text** field, enter your SMTP password.
4. Click the **Encrypt** button.
5. The tool displays an encrypted password in the **Encrypted** field.
6. Copy the encrypted password and paste it within the quotes of the `SMTPPass = ""` setting in the setup file.
7. Save and close the setup file.

Error Messages

When submitting a form or a content block in an approval process, if you get an error message listed below, it is generated by the SMTP server on which you set up the mail system, *not* by **Ektron CMS200/300**.

- **The Transport failed to connect to the server. [CBR SendMail R1] [CBR R65] [DIO R 36]**
- **The server rejected one or more recipient addresses. The server response was: 550 5.7.1 Unable to replay for yourname@company.com [CBR SendMail R1] [CBR R1] [DIO R36]**

What's Next?

After you set up the mail server, you can begin using **Ektron CMS200/300**. For e-mail notification to work properly in Ektron CMS200/300, the following criteria must be met.

- Valid system email address is provided
- Email notification is enabled in the settings table
- Valid user email Address is provided
- User email notification is enabled

For information about setting these criteria in Ektron CMS200/300, refer to the *Administrator Manual.*

SSL Support

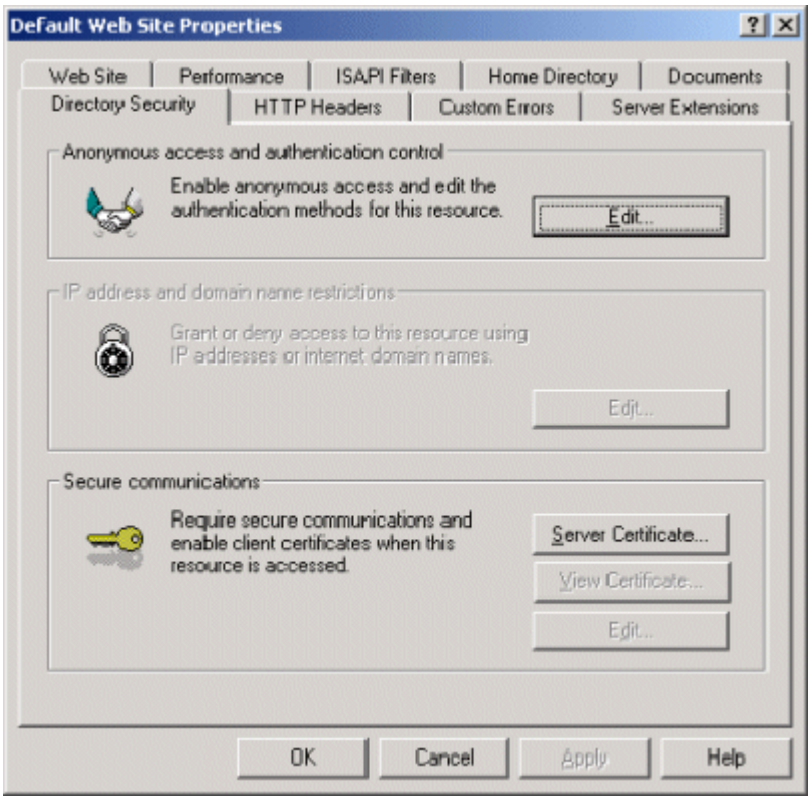
In Ektron CMS200/300, you can use SSL when users log in to your Web site. SSL encrypts the username and password during transmissions to the server.

When you set up the SSL certificate, and configure Ektron CMS200/300 to use it, the login page is launched in a Secure Socket Layer. This section explains how to set up SSL for Ektron CMS200/300.

Setting Up the Certificate

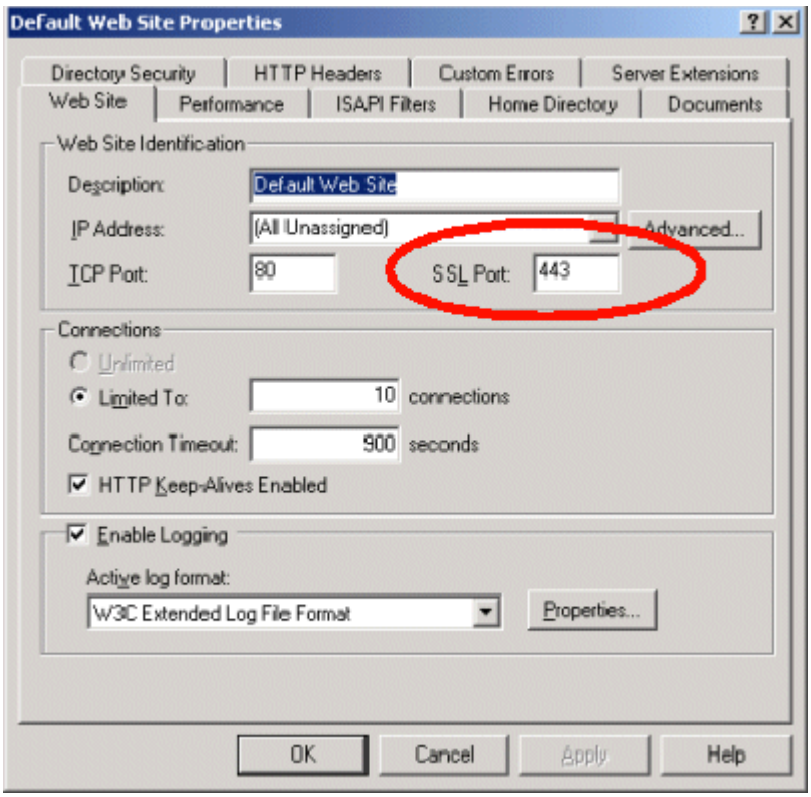
If your Web server does not have a certificate installed, you need to install one. To do so, follow these steps.

1. Access the Internet Information Server Administrator Console on your Web server.
2. Navigate to the computer and Web site to which Ektron CMS200/300 is installed.
3. Right click the Web site.
4. Click **Properties**.
5. Click the **Directory Security** tab.



6. In the Secure communications area, click the **Server Certificate** button.

7. Use the wizard to set up a certificate for your Web site.
8. Click the **Web Site** tab at the top of the Properties window.



9. Set the **SSL Port** that the Web server will use.
10. Click the **OK** button.

Now that you have installed the certificate to the Web server, you can configure Ektron CMS200/300 to use it.

Updating Ektron CMS200/300

To update Ektron CMS200/300 for SSL support, follow these steps.

1. Open `CMS200/300sample/CMS200/300scripts/setup.aspx`.
2. Find the line that starts with `Use SSL`.
3. Make the following changes to the file:
   - UseSSL= true
   - SSL_Port = 443 *(unless you specified another SSL port)*
4. Save and close the file.

5. You are set up to use the SSL support for Ektron CMS200/300.

WARNING! If the UseSSL line is set to **True**, but the certificate is *not* installed to the Web Server, you cannot log into Ektron CMS200/300.

DSN-less Connection

In addition to using an ODBC connection for a standard database connection, Ektron CMS200/300 lets you to create a DSN-less connection using OLE DB. If you are planning on using OLE DB, you have two options:

- Use a UDL file
- Use an OLE DB provider string

This section explains both options.

Before You Begin

Before you can access the Ektron CMS200/300 database via OLE DB, you must know

- The type of data you want to access
- The server that stores the data
- The database that stores the data

Once you know this, you are ready to create an OLE DB connection to your Ektron CMS200/300 Database.

Creating a UDL File

Whether you are using a Provider string or a UDL file, you can use the UDL wizard to create the file or string. Once Ektron CMS200/300 has been installed, you are ready to begin.

Windows 98/ME/NT

1. Right click the Desktop.
2. Select **New**.
3. Select **Microsoft Data Link** to create a .udl file.

Windows 2000

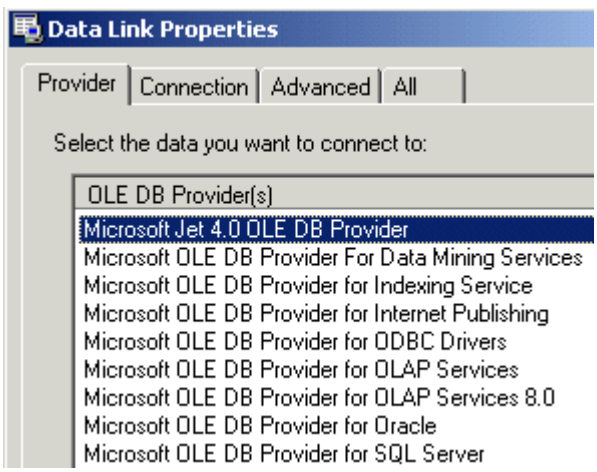
1. Open **Windows Explorer** or **My Computer**.
2. Select the folder in which you want to save the .UDL file.
3. On the File menu, click **NEW** then click **Text Document**.
4. Right click the text file you created in step 3, then click **Rename**. Type the new file name using a **.udl** file extension. Press **Enter**. For example: *MyUDLfile.UDL*
5. You may get a warning, message box, explaining that changing the file extension may cause files to become unusable. This is fine. Click **OK**.

Configuring The UDL File

After you create the UDL file, configure it to use the proper database and settings.

1. Double click the UDL file to bring up the Data Link Properties Dialog Box.

2. When the Data Link Properties dialog opens, click the **Provider** tab



3. Select the driver you wish to use.

4. Click **Next >>** to move to the **Connection** tab.
5. Enter the connection properties.

NOTE Each driver requires different settings. All drivers require a user name and password.

6. Click **Test Connection** to verify your connection is working correctly. Change accordingly if you get an error.
7. Select the **Advanced** tab only if you require advanced settings.
8. When done, click the **OK** button to save and close the UDL file.

Now that you have created and configured a UDL file, you have two options:

- ”Configuring Ektron CMS200/300 for the UDL File” on page 79
- ”Configuring Ektron CMS200/300 for the Provider String” on page 80

Configuring Ektron CMS200/300 for the UDL File

After you create and configure the UDL file, follow these steps to access that file.

1. Using Windows Explorer, navigate to the directory to which Ektron CMS200/300 for ASP was installed. By default, the directory is `C:\Inetpub\wwwroot\CMS200/300Sample`.
2. Save the UDL file under the CMS200/300Sample directory.
3. Open the file(s):
   - CMS200/300sample/CMS200/300scripts/setup.asp
   - CMS200/300sample/CMS200/300scripts/setup.aspx
   - CMS200/300sample/CMS200/300scripts/setup.php
   - CMS200/300sample/CMS200/300scripts/setup.cfm
4. At the line where it says `DSN=”CMS200/300_v45_Access”`, change this to DSN=”Filename=” *& <Path To UDL File> &* “\” *& UDLFileName &* “.UDL;”

   An example of this is below.

```
DSN = "File name=C:\inetpub\wwwroot\CMS200/300Sample\MyUDLFile.udl"
```

Configuring Ektron CMS200/300 for the Provider String

Converting UDL file to a Provider String

After creating the UDL file, you can convert the information into a string that can be used in Ektron CMS200/300.

1. Right click the UDL file you created earlier.
2. Click **Rename** from the list of options.
3. Rename the file MyUDLFile**.txt**
4. You may get a warning, message box, explaining that changing file extensions may cause files to become unusable. This is fine, click **OK**.
5. Double click the file. Something like the following appears.

```
[oledb]
;Everything after this line is an OLE DB initstring
Provider=Microsoft.Jet.OLEDB.4.0;DataSource=C:\Inetpub\wwwroot\CMS200/
300Sample\database\CMS200/300_v30_Access.mdb;Persist Security Info=False
```

6. The following line is the connection string from the file:

```
Provider=Microsoft.Jet.OLEDB.4.0;DataSource=C:\Inetpub\wwwroot\CMS200/
300Sample\database\CMS200/300_v45_Access.mdb;Persist Security Info=False
```

This will be used when configuring Ektron CMS200/300.

Configuring Ektron CMS200/300 to use the Provider String

With the provider string, you can configure Ektron CMS200/300 to use it.

1. Using Windows Explorer, navigate to the directory to which Ektron CMS200/300 was installed. By default, the directory is `C:\Inetpub\wwwroot\CMS200/300Sample`.
2. Save the.txt file under the CMS200/300Sample directory
3. Open the file(s):
   - CMS200/300sample/CMS200/300scripts/setup.asp
   - CMS200/300sample/CMS200/300scripts/setup.aspx
   - CMS200/300sample/CMS200/300scripts/setup.php
   - CMS200/300sample/CMS200/300scripts/setup.cfm

4. At the line that says `DSN=”CMS200/300_v45_Access”`, change this to `DSN=”Provider= <string>”.`

   An example of this may be

```
DSN = "Provider=Microsoft.Jet.OLEDB.4.0;DataSource=C:\Inetpub\wwwroot\
CMS200/300Sample\database\CMS200/300_v45_Access.mdb;Persist Security
Info=False"
```

Customizing Ektron CMS200/300

The following chapter contains information about customizing your Ektron CMS200/300 application. The topics that are discussed are:

- ”Language SDK” on page 83
- ”Customizing Ektron CMS200/300 Emails” on page 89
- ”Branding Ektron CMS200/300” on page 95

Language SDK

Ektron CMS200/300 includes a unique tool that lets you customize your application to over 120 different languages. Using this tool, you can customize all of the words and phrases necessary.

After translating the text strings with the tool, you can set the language active on the Web site. This converts all English strings to the selected language. The translation of the strings must be complete in order for the language to be selectable for the site.

Out of the box, Ektron CMS200/300 has translated strings for:

- English (US)
- French (Standard)
- German (Standard)

You can set these languages active to your Ektron CMS200/300 application without using the language translating tool.

The following instructions explain how to access, convert, and set new languages active on your Web site.

Before You Begin

Before using the language translator utility, you should read the understand security issues that can arise. When you install Ektron CMS200/300, the language translator is installed under `Program Files/Ektron/CMS200/300/utilities` directory. When you are ready to use the translator, move the following files to the `CMS200/300Sample` directory.

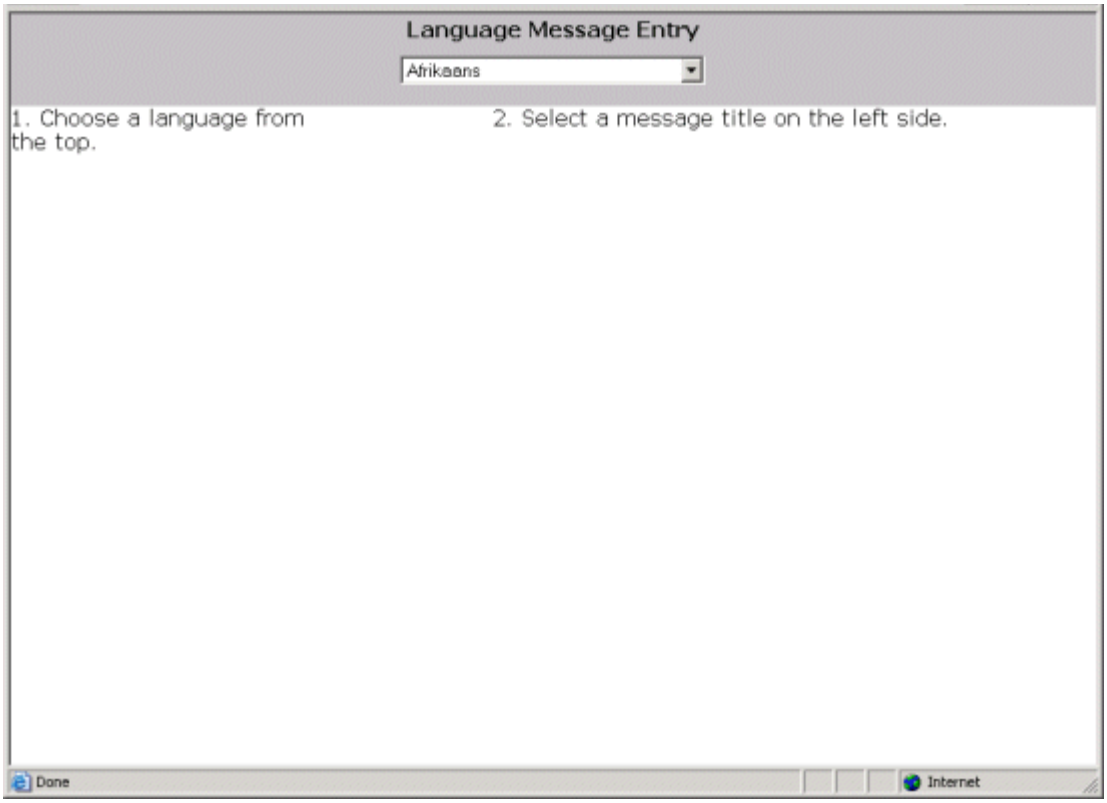
- lang.asp
- lang_entry.asp
- lang_top.asp
- lang_englishdisplay.asp

After you move the files, you can access the utility by browsing to `http://www.YourSite.com/CMS200/300Sample/lang.asp`. From that page, you can perform tasks described later in this section.

After you finish using the language translator, Ektron advises you to move the SDK files into a non-public directory, such as `C:\Program Files\Ektron\CMS200/300`. This practice prevents outside users from changing your Web site.

Accessing the Translator

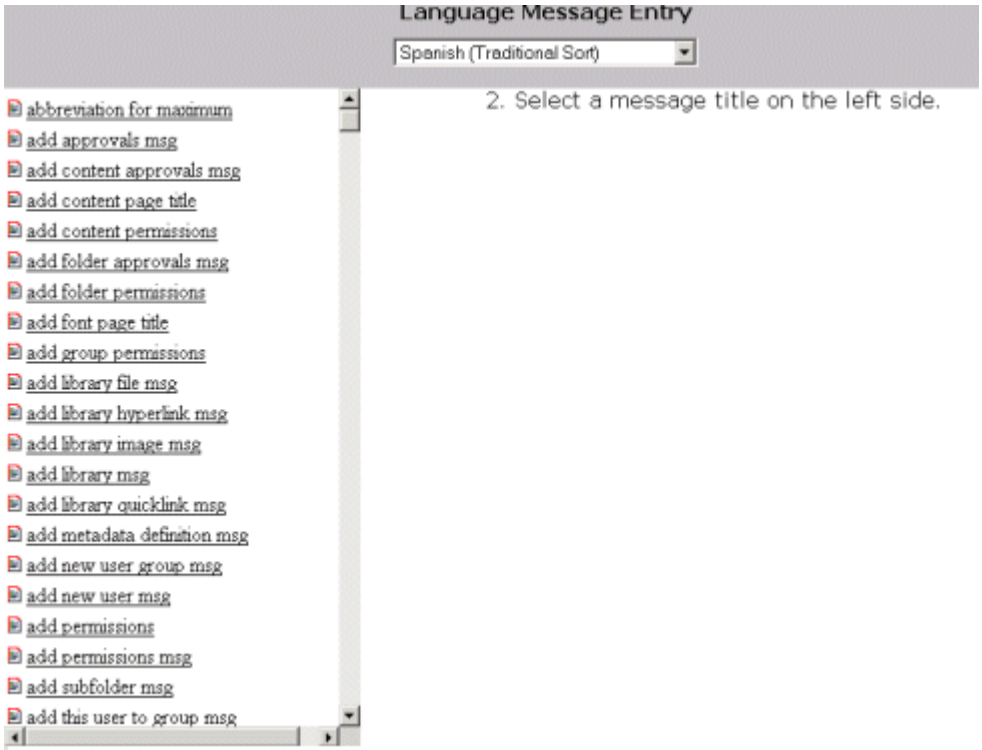
To access the language area, go to URL where you placed the file lang.asp, for example `http://www.yoursite.com/CMS200/300Sample/lang.asp`. When you arrive at the page, the following screen appears:



Selecting a Language

To select a language into which you want to translate English strings, use the drop down box at the top of the page

When you select a language, the following screen appears.



Here, you can access and translate the strings.

String Icons

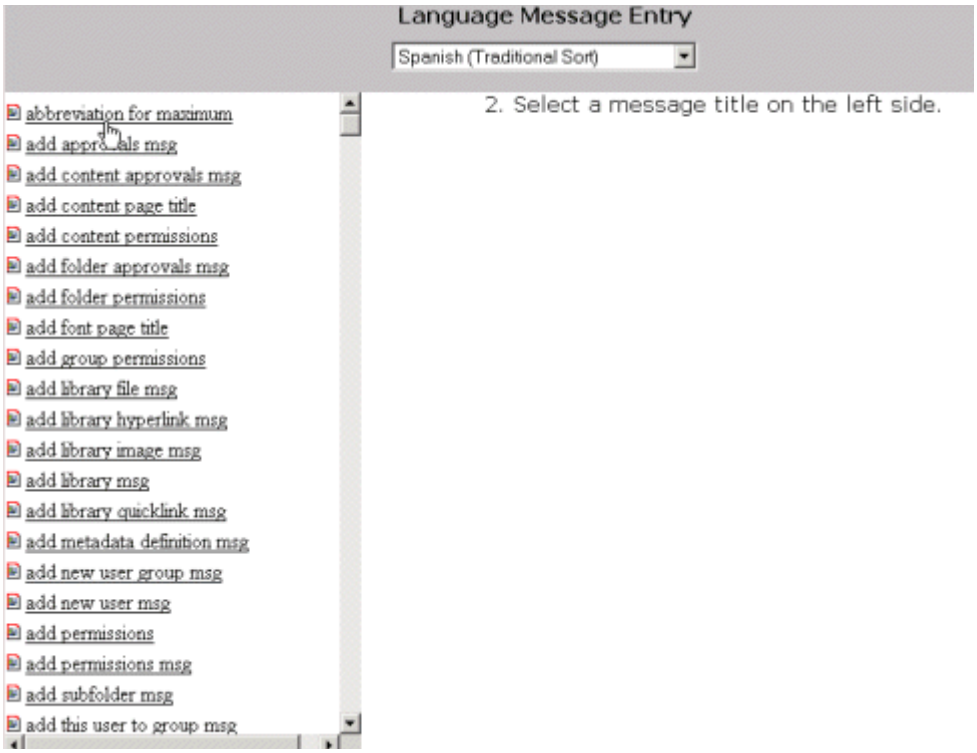
Two string icons are used throughout the translation process.

Icon	Meaning
	Translated string
	Un-translated string

Translating Strings

Selecting String

To translated a string, click it in the left frame. When you do, the following window appears.



From this window, you can see the English version of the strings and translate them.

Translating

To complete the translation of a string, follow these steps:

1. Click the string to be translated in the left frame.
2. Insert the translated message in the proper text field.
3. Insert the translated comment in the proper text field (maximum75 characters).
4. Click the **ADD** button in the upper right side of the screen

After you click **ADD**, the icon next to the string you translated should change. *See Also:* "String Icons" on page 86

NOTE This may take some time. Please wait until the utility is complete.

Editing a String

If you need to modify a string, select it again and make the necessary changes to the text fields.

Images

Although most Ektron CMS200/300 buttons are pictures and do not require translation, a few images contain words and do require translation. The language translation utility does not translate text within images. Instead, you must make the changes manually by creating a directory and then copying and editing the images. For example, if you are translating **Ektron CMS200/300** to Swedish, you would create a new folder under `webroot/CMS300Sample/cms300scripts` named `swedish`.

Location of Images

When a language is set active, Ektron CMS200/300 references the images from the corresponding directory. As examples:

- when English (US) is set active, images are referenced from `webroot/CMS300Sample/CMS200/300Scripts/images/english`.
- when German is set active, images are called from `webroot/CMS300Sample/CMS200/300Scripts/images/german`.

NOTE You can copy images out of the English folder into a foreign language folder, and only modify images that need to be translated.

Customizing Ektron CMS200/300 Emails

Introduction

Ektron CMS200/300 can send email notification to users, informing them that actions have either taken place or are requested of them. For example, a content contributor receives an email that his content has been published to the Web site.

These emails are stored in and received from the app_messages table in the database. In that table, each email consists of one string for the subject and one for the body. Ektron CMS200/300 does not currently support HTML emails, however the messages are fully customizable.

The body of an email often includes variables, which are between the @ symbols. Ektron CMS200/300 replaces these variables on the fly with the information for that instance of the email. For example, **@appContentTitle@** in the following sentence is replaced with the email's title.

Before	The content "**@appContentTitle@**" has been deleted.
After	The content "Home Page Content" has been deleted.

These emails can be customized. The variables can be taken out or moved around. More text can be added; text can be rewritten or reorganized.

Before	"**@appContentTitle@"** has been deleted from the XYZ Web site.
After	"About Us" has been deleted from the XYZ Web site.

Each message is called in the presentation layer by its message title.

Carriage Return/Line Feeds are represented by the variable @**appCRLF**@. These cause the email to move down one line. For example:

Before	The content was approved.@**appCRLF**@Thank you!
After	The content was approved. Thank you!

Using the Language SDK to Customize Email

Ektron CMS200/300 provides an SDK to convert Ektron CMS200/300 to different languages. The SDK provides a means for adding versions of the English strings to different languages. This SDK can also be used to change the English message in the database. By default, the language SDK files are located in `C:\Program Files\Ektron\CMS200/300\utilities`. The files are:

- lang.asp
- lang_englishdisplay.asp
- lang_entry.asp
- lang_top.asp.

Please copy these files into a utilities folder underneath the CMS200/300scripts folder.

WARNING! Remember to remove these files from the web site when you are done.

To translate the message variables to a language of your choice, follow these steps.

1. From the dropdown box at the top of the screen, choose **English (US)**.
2. The left frame displays a list of all message titles in the database.
3. Click the message title for the email you want to translate.
4. The right frame displays an input box, which displays the English message.
5. In this box, translate the message into the desired language.

6. Click the Update button.

All Ektron CMS200/300 messages can be updated here, not only emails.

NOTE For more information regarding the language translator utility, see "Language SDK" on page 83.

Variables

The following table lists variables you can use to customize email messages. When the email is sent, the corresponding description replaces the variable.

Variable	Inserts
@appCRLF@	A carriage return.
@appContentTitle@	The title of the content block.
@appDeletionDateTime@	The date and time the content will be deleted from the Web site.
@appChangeDateTime@	The date and time changes will be updated on the Web site.
@appDeclinerFirstName@	The first name of the user who declined the content block.
@appDeclinerLastName@	The last name of the user who declined the content block.
@appSubmitterFirstName@	The first name of the user who submitted the content block.
@appSubmitterLastName@	The last name of the user who submitted the content block.
@appFolderPath@	The location of the content block in the folder tree in the Ektron CMS200/300 Workarea.
@appContentLink@	The link to the content block on the Web site. Note: You must be logged in to see the changes.
@appSubmitterDateTime@	The date and time the content block was submitted.
@appApprovalList@	The current approval list that the content block must pass through.

Variable	Inserts
@AppComment@	Displays the comments for the content block.

List of Ektron CMS200/300 Emails

Notify Approval Process Complete

Because of the logic, there are four emails for notifying that the approval process is complete.

Deletion of Content Approved

Message Title: email subject: content deletion approved.

Message Text: Deletion of content has been approved.

Message Title: email body: content deletion approved.

Message Text: The deletion of the content "**@appContentTitle@**" has been approved. The content deletion will occur on: **@appDeletionDateTime@**.

Immediate Deletion of Content

Message Title: email subject: content has been deleted.

Message Text: Content has been deleted.

Message Title: email body: content has been deleted.

Message Text: The deletion of the content "**@appContentTitle@**" has been approved. The content was deleted immediately.

Approved Content Awaiting Go Live Date

Message Title: email subject: content changes approved.

Message Text: Content changes have been approved.

Message Title: email body: content changes approved.

Message Text: The changes to the content "**@appContentTitle@**" have been approved. The content changes will occur on: **@appChangeDateTime@**.

Approved Content Published Immediately

Message Title: email subject: content has been changed.

Message Text: Content changes have been made.

Message Title: email body: content has been changed.

Message Text: The changes to the content "**@appContentTitle@**" have been approved. The content changes went live immediately.

Decline Approval Request

Message Title: email subject: approval request declined.

Message Text: Content approval request declined.

Message Title: email body: approval request declined.

Message Text: Your submitted approval request for the content "**@appContentTitle@**" has been declined by "**@appDeclinerFirstName@ @appDeclinerLastName@**".

Send Approval Message

Message Title: email subject: request for approval.

Message Text: Request for content approval.

Message Title: email body: request for approval.

Message Text: The content "**@appContentTitle@**" has been submitted for your approval by "**@appSubmitterFirstName@ @appSubmitterLastName@**".**@appCRLF@@appCRLF@**To locate the content, the folder path in your workarea is: **@appFolderPath@**.**@appCRLF@@appCRLF@**The following link will take you to the submitted content block on the Web site: **@appContentLink@**.**@appCRLF@@appCRLF@**Please Note: You must login and select the preview icon to view the changes.**@appCRLF@@appCRLF@**The content was submitted for

approval on:
@appSubmittedDateTime@.@appCRLF@@appCRLF@Approvals:
@appApprovalList@@appCRLF@@appCRLF@Comment:
@appComment@.

Branding Ektron CMS200/300

Ektron CMS200/300 can be branded by a Web Developer. Through the use of a style sheet and replacing Ektron CMS200/300's default graphics, the application can take on a different look that is fully customizable. Developers can incorporate a company logo, institute company colors, and control the look and feel of the application to create a personalized, web-based, content management solution.

Style Sheet

Ektron CMS200/300's style sheet, global.css, is located in the **/csslib** folder under the **CMS200/300scripts** directory.

Using widely accepted style sheet classes and class attributes, you can modify the application, including colors, spacing, fonts, etc. Also, if you later upgrade or re-install **Ektron CMS200/300**, you can reuse this file and retain your changes.

Class Explanation

General Classes

Class	Description
.titlebar	Located at the top of every page in the application, this class is used for page explanations or location explanation. While navigating through Ektron CMS200/300, this page header or titlebar tells the user where they are (for example, Viewing content in content.asp).
.titlebar-error	Very similar to titlebar, this class is used to display error messages.
.input-box-text	In front every input box is text explaining its purpose. This class controls that text.
.title-header	This class is used under the titlebar when information is going to be listed. This is used to control the column headers.
.info	Any important information that should stand out gets the info class. An example of this class can be seen in the content page when showing the attributes of the content block.
.info-header	Very similar to the info class. This is used for information that should stand out but starts a new section on a page. An example is the word “metadata” or “summary” on the content block properties page
.toolbar	This class controls the background of the toolbar. NOTE: Unless you are changing all the icons do not change this class
.appname	Under the application logo are the words **Content Management**. This class controls the look of these words. This class should match the titlebar class to maintain consistency.

Calendar Classes

Class	Controls
.**cal-link**	Text used for the days of the week

Class	Controls
.cal-header	Table rows, cells and links. The top row of the calendar is controlled by the TR. The TD version controls the text defining the active month. The Anchor class controls the month before and after. Also cells that aren't used in the month receive their color from this class.
.cal-header2	The color used behind the days of the week.
.cal-day-link	The active (that is, selected) day.
.cal-day-link2	All days in the month that are not active.
.cal-submit	The buttons at the bottom of the calendar.

Workarea Classes

Class	Controls
.**workarea**	The background color for the workarea.

History Classes

Class	Description
.history-list	This class is used for two attributes. The TD controls the active date or the version that is presently published. The Anchor class is for the other versions of the content block.

Login Classes

Class	Controls
.login	The background color of the login and logout screen.

Folder Control Classes

Class	Controls
.folder	The font attributes of the folder control. NOTE: The font size cannot be controlled by the style sheet. It is set by the browser.

Library Classes

Class	Controls
.library	The background color of the three panels in the library.

Images

Application Images

To change the look **Ektron CMS200/300** via a logo, you must change two images.

- **workarea_logo.gif** - the logo of the application. It presently displays the Ektron CMS200/300 logo. It resides in the `\cms300scripts\images\application` directory.

  By changing this image, the application can be branded to display any other graphic or logo. You must use the same size attributes of 155 pixels wide by 77 pixels high. Alternate size attributes will cause the application to look wrong.
- **navigation_edit.gif**. This also resides in the application folder. This image is used for the left bar in the edit content, edit metadata, edit summary, and add content work areas. This image can also be changed but must retain the same size attributes of 128 pixels wide by 500 pixels high.

A third image, **workarea_back.gif,** makes up the blue/gray background at the top of the workarea. The size attributes are 50 pixels wide by 77 pixels high. This image cannot be less than 50 pixels wide as Netscape will not repeat it correctly.

Language Images

Several language specific Images are used at the top of the workarea. They reside in the language folders and always start with the word “workarea” and end with “_top.”

These images are 467 pixels wide by 77 pixels high. Their width can change but the height cannot.

There are approximately six images in each language folder. an Adobe Photoshop file, workarea_top.psd, can be found under `\cms300scripts\images\English` folder. You can modify these images as needed.

Migrating Your Existing Site to Ektron CMS200/300

Overview

This chapter explains the steps needed to migrate your existing Web site to a site using Ektron CMS200/300. This chapter answers the following questions:

- What do I need to copy to my Web site?
- How do I setup and deploy my templates?

This chapter assumes you installed Ektron CMS200/300 and have read the Ektron CMS200/300 Administrator Manual so that you have an understanding of basic concepts, some of which are mentioned here.

Initial Steps

The following section describes tasks you need to perform before migrating your Web site.

Installation

Ektron CMS200/300 requires a physical installation of the product. If you do not have physical access to the machine, someone with access to the machine must run the install.

NOTE For additional information about installing Ektron CMS200/300, see "Installing Ektron CMS200/300" on page 19.

The back end of Ektron CMS200/300 consists of COM objects and a layer of ASP. The COM objects must be registered on the system. Fortunately, the install does this.

If you do not have physical access to the machine, have someone with access run the install or manually register the COM objects.

Verify Installation

After you install Ektron CMS200/300, verify that it is properly installed by using the sample site. By default, the sample site is located at the following address on the machine to which Ektron CMS200/300 is installed:

http://localhost/CMS200/300Sample/index.asp

If you can browse the sample site, and it is working properly, you can be assured that the CMS is properly installed.

> **Best Practices**
>
> Ektron recommends keeping a working version of the sample site. This can be used to help you debug problems later on. For instance, if you begin to encounter errors on your site, you can refer to the sample site to see if those same errors occur. If they do, that may indicate a problem with the installation. If they do not, the installation is probably OK and some external factor is causing the problem.

Setting up Your New Site

This section discusses tasks that you need to perform when setting up your new site to be managed by Ektron CMS200/300.

What to Copy to Your Site

First, you need the application core files, which the display layer for the application. These files help the workarea, library and even the content functions to operate properly. The files are kept in the `CMS200/300Sample/CMS200/300Scripts` directory.

Copy the **/CMS200/300Scripts** folder into your site's folder.

NOTE If you are using ColdFusion, copy the **CMS200/300Sample/Application.cfm** file as well. If you already have an application.cfm in your site, just copy the include line from our application.cfm and put it in yours. This include line points to the setup.cfm in the scripts folder.

Setting up the Database

Since all content is stored in a database, you need to create one. Ektron CMS200/300 supports the following database types:

- Microsoft Access
- Microsoft SQL (7.0 and greater)
- MySQL
- Oracle (9i)

The installation automatically creates a sample Access database and the scripts needed to create tables in the other databases. Additional information about creating databases for Ektron CMS200/300 can be found in "Ektron CMS200/300 Databases" on page 40.

> **Best Practices**
>
> If you plan on using Ektron CMS200/300 in an Internet environment or large Intranet, it is *strongly* recommend that you use MS SQL as your database. MS-SQL is more secure and robust than Access and is not subject to data corruption as Access is. MySQL and Oracle would work fine as well.

The installation also includes a database mover to help you move content from one database type to another. For instance, if you started development in MS Access and now want to use a MS SQL database, the database mover moves information between the databases.

If you want to use a DSN-less connection instead of ODBC, refer to "DSN-less Connection" on page 77.

Modifying Application Parameters

After you install and create your Ektron CMS200/300 database, you need to modify the application parameters.These settings are found in the setup file that corresponds to your scripting environment. For instance, if you are using ASP, modify setup.asp; for ColdFusion, modify setup.cfm; etc. These files are located in the `/CMS200/300Scripts` folder.

Edit that file and modify the following settings

Setting	Type in...
DSN	The datasource name that you created for you database.

Setting	Type in...
dbtype	The type of database you are using. Note: When using an Oracle database, the DBType="Oracle"
dbusername/ dbpassword	The username and password, if your database requires one.
OracleSvr	Oracle service information.
SitePath	The relative path from web root to the scripts folder.

NOTE If you are using SSL, the settings you need to modify are discussed in "SSL Support" on page 72.

Creating a Login Page

Now that everything is setup, you can create a login page. You can either copy the one from the sample site or create your own. The easiest way to create a login page is to use the Dreamweaver/ UltraDev extension supplied in the installation. That extension lets you add the login tag through the WYSIWYG interface.

(See "Dreamweaver Extension Support" in the Ektron CMS200/ 300 Developer's Reference Manual for additional information.)

If you do not have Dreamweaver/UltraDev, a list of the content tags can be found in the Ektron CMS200/300 Developer's Reference Manual.

Logging In

To log into your Ektron CMS200/300 Web site, perform the following steps:

1. Browse to the login page you have created, and click the login button.
2. A login dialog box opens asking for a username and password

3. Enter the default username and password, **admin/admin**, and click **Login**.

You are logged into Ektron CMS200/300

NOTE If you get a message telling you that the application has been locked, you can login using the builtin account. The username and password is **builtin/builtin**. You would get this message if your license key is either invalid or hasn't been entered yet.

Modifying Configuration Settings

After logging into the Ektron CMS200/300 Web site, access the Workarea by clicking on the Workarea button. From there, you can modify the configuration settings.

Setting up Active Directory

If plan to use Active Directory, configure this now. The settings for Active Directory can be found under the configuration folder.

Refer to "Active Directory Integration" in the Ektron CMS200/300 Administrator Manual for further information.

Modifying the Setup Screen

The Ektron CMS200/300 setup section is located under the Configuration folder as well. The setup section allows you to configure items such as your license key, style sheet support, max content sizes and default language.

Setting up Meta Data

Ektron CMS200/300 includes extensive metadata support. Metadata definitions are in the Configuration folder in the workarea. You can have as many metadata definitions as needed.

See "Metadata" in the Ektron CMS200/300 Administrator manual for additional information.

Setting up XML Configurations (Ektron CMS300 only)

You can also set up your XML configurations. The XML files (such as schemas and XSL transforms) are created outside of Ektron

CMS200/300, using tools such as XML Spy. These XML configurations are then associated with content blocks and content folders.

See “XML Configurations” in the Ektron CMS200/300 Administrator Manual for additional information.

Creating Ektron CMS200/300 Users

If you are not using the Active Directory support, you need to manually add your users. The number of allowed users is determined by your license key. For instance, if you purchased a 10-user license, you can only enter 10 users in the system.

NOTE If you exceed the licensed amount, you may get locked out of the application.

Creating User Groups

Every user must belong to a group. When you first add a user, the user is automatically added to the Everyone” group. You can create more user groups to add the users to.

You can create users by the functional role in the company (for example, all marketing users in a marketing group) or can group them by permission type (for example, all editors in an editor’s group, and all publishers in a publisher’s group).

There is no limit to the number of user groups. How you create them is up to you.

Configuring Content Folders

After creating users and user groups, create folders to organize content blocks, and assign permissions and workflow to the

content in them. You can create as many folders as you want and each folder level can go as deep as you want.

> **Best Practices**
>
> It is best to not let your folder structure get out of control. Keep it simple so it is easy for your users to navigate.
>
> The folder structure should make sense to the users who will navigate it. Maybe you'll have 6 or so top level folders, and each level may go 4 or so deep.
>
> This folder structure is replicated under the library folder.

As you create these folders, assign a default template and style sheet. The default template is used when a new content block is created and Ektron CMS200/300 creates a Quicklink that points to the new content block. If you do not provide a default template, it is inherited from the parent folder.

You can also add the permissions and approval process as you create the folder structure. Permissions can be given to a particular user or a user group. The same goes for the approval process.

> **Best Practices**
>
> Do not give too many permissions to the Everyone group, because every user has permission to that content. Similarly, you probably don't want to give the Everyone group approval permissions, because that means that everyone can publish content.

Creating Your Templates

Now you can create your templates. Templates contain the look and feel of the site. Masthead, navigation, and footer graphics would be considered the template.

The easiest way to create templates is to use Dreamweaver/UltraDev. The installation includes a custom extension that lets you add Ektron CMS200/300 custom tags through the WYSIWYG interface. If you do not have Dreamweaver/UltraDev, a list of tags can be found in the Developer's Manual.

Refer to "Dreamweaver Extension Support" in the Ektron CMS200/300 Developer Reference Manual for additional information.

You can add as many content tags as you want per template, however you can only have one dynamic tag per template.

Best Practices

Since dynamic templates have URL parameters to them, it is best to make each landing page and other important pages static tags. This makes it easier for you to remember if you need to provide that link to someone. For instance, each main landing page off of your main navigation could use the static tag. Then, as you go deeper into that section, those pages use a dynamic tag.

Migrating/Creating Content

At this point, you can begin to create/migrate your content. If you are migrating your content from your existing site, add a new content block in a content folder you have created, and simply cut and paste the content into the Ektron CMS200/300 editor.

NOTE Images and files must be uploaded and inserted into the content separately.

Deployment

Deployment from development to production is as simple as moving the files over. To properly deploy your new Ektron CMS200/300 Web site, perform the following steps:

1. Register the Ektron CMS200/300 COM objects on your production machine.

NOTE If you performed the installation program on your production server, the objects are registered automatically.

2. Copy all assets (templates, images, files, etc.) from your development box to your production machine.
3. Move the database.

   You can either

- point your data source on the production machine to the same database you were using

or

- make a copy of the database, move it to your production box and make a data source to that

Advanced Features

The previous information allows you to create a basic Ektron CMS200/300 Web site from scratch. This section explains some advanced features that you may implement as well, although they are not needed for the Web site to function properly.

Email Notification

For email notification to work in Ektron CMS200/300, make sure the SMTP service is set up and running in IIS and that it points to a valid mail server. Refer to ”Configuring E-Mail Notifications” on page 64 for additional information.

Other

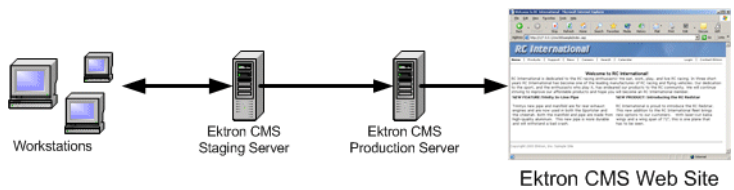
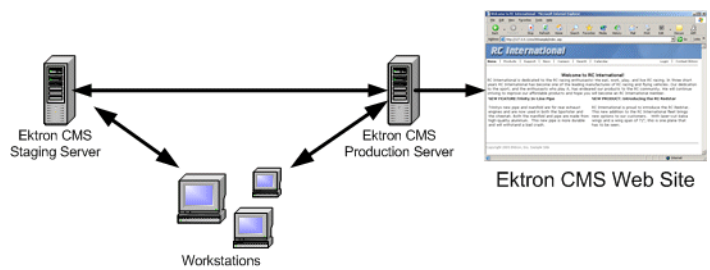
Other items, such as Load Balancing, can be configured in Ektron CMS200/300. See the special features section of the Administrators Manual for more information.

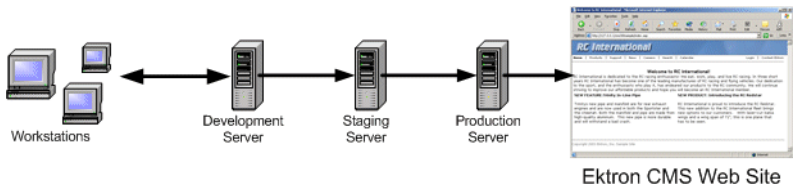
Deploying Ektron CMS200/300 via MS Application Center

Overview

By default, Ektron CMS200/300 is installed directly on a production server and a virtual staging server manages changes to the Web site's content and assets. This model works for most users, but other methods can be used for staging.

Three major uses of staging are listed below.

Description	Flowchart
A staging to production model, where no changes are made on the production server.	
A staging to production model, where changes are made to both servers then merged.	

Description	Flowchart
A development to staging to production model.	

This chapter explains how to deploy Ektron CMS200/300 in different models.

What is Deployment?

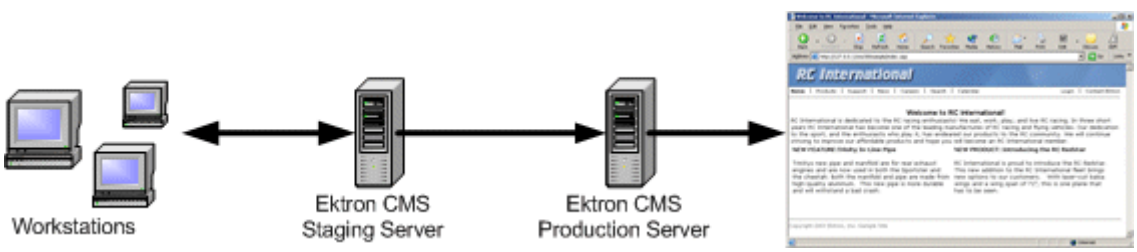
The premise of deployment is that the following can be moved from one server to another using Microsoft's Application Center:

- application files
- templates
- assets (that is, uploaded images and files)
- registry entries
- DSNs

Then, a SQL server can move the database content.

This model requires at least two servers, each having a different role. One server is a staging server, and the other is a production server that publishes files and data to the live Web site.

Displayed below is an example of this model.



In this example, Ektron CMS200/300 users changes content and files on the staging server. When desired, the necessary files are deployed using MS Application Center, and the data stored in the database is synchronized, using MS SQL Server, to the production server to be viewed by visitors.

Other Configurations

Several staging servers could be used to further stage Web site content. Reverse publishing may also be used to make a staging server match the production server.

Audience

Since the deployment model relies heavily on Microsoft Application Center and Microsoft SQL Server, you should have some knowledge of them. Although the basic steps needed to configure the deployment model are explained in this chapter, prior experience with these applications helps you make better decisions.

Requirements

The requirements include:

- Ektron CMS200/300
- Windows 2000 Server or Higher
- Microsoft SQL Server
- Microsoft Application Center

Prerequisites

Before you can perform the configuration, complete these tasks.

1. Obtain two similar server machines with the following configurations:
   - Pentium-compatible 400 MHz or higher processors
   - 256 MB Ram (minimum)

NOTE The more differences between the two machines (for example, RAM, speed, brand, etc.), the greater the chance problems may occur.

2. Install Windows 2000+ (or higher) Server operating system on both machines.
3. Enable IIS on both servers.
4. Install MS-SQL server on both servers.

NOTE Be sure the security is configured properly by using either Windows or SQL Server authentication. Refer to your MS-SQL documentation for more information.

5. Install Microsoft Application Center on both servers.

Once the prerequisites are met, you can configure staging and production servers to deploy Ektron CMS200/300.

Deployment Model Configuration

The following section explains the steps required to successfully configure your servers for Ektron CMS200/300 deployment.

Configuration Overview

Here is an overview of the steps for configuring deployment.

1. Install Ektron CMS200/300 on the staging server.
2. Set up a MS-SQL database for Ektron CMS200/300.
3. Configure Application Center on the staging server.
4. Configure Application Center on the production server.
5. Deploy the Files.
6. Configure MS-SQL databases.
7. Synchronize the Databases.

Installing Ektron CMS200/300 on the Staging Server

First, install Ektron CMS200/300 on the staging server. (For more information, see ”Installing Ektron CMS400” on page 1.) During the installation, you are given the option of creating an MS-SQL database.

Setting Up a MS-SQL Database for Ektron CMS200/300

To create an MS-SQL database, follow these steps.

1. Create an empty MS-SQL database. See "Run Database Setup Utility" on page 13.
2. Run the Ektron CMS200/300 SQL script against the database to create the necessary tables.
3. Move content to the new database.
4. For more details on this procedure, see the readme.txt file that is installed to `C:\Program Files\Ektron\CMS300\Database`.

Modifying web.config

After performing the above steps, update your web.config file to reflect the changes. Below is a list of changes to be made.

Line	Value
ek_dbDatabase	Replace the current DBType with **SQL**
ek_dbUsername	If required, specify the username needed to connect to the DSN.
ek_dbPassword	If required, specify the password for the username given.

Configuring Staging Server's Application Center

After you install Ektron CMS200/300 and it functions properly with the MS-SQL database, configure Application Center on the staging server. To do so, follow these steps:

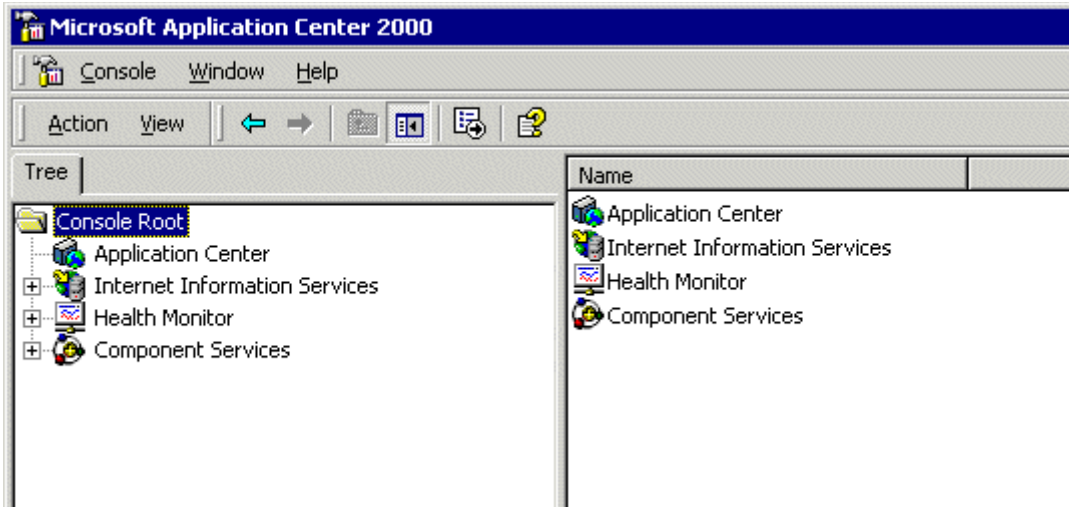
1. Connect to the staging server via Application Center.
2. Create a new cluster including the staging server.
3. Configure application settings on the staging server.
4. Add the production server to the cluster.
5. Push all files from the staging server to the production server.

The following sections explain these tasks.

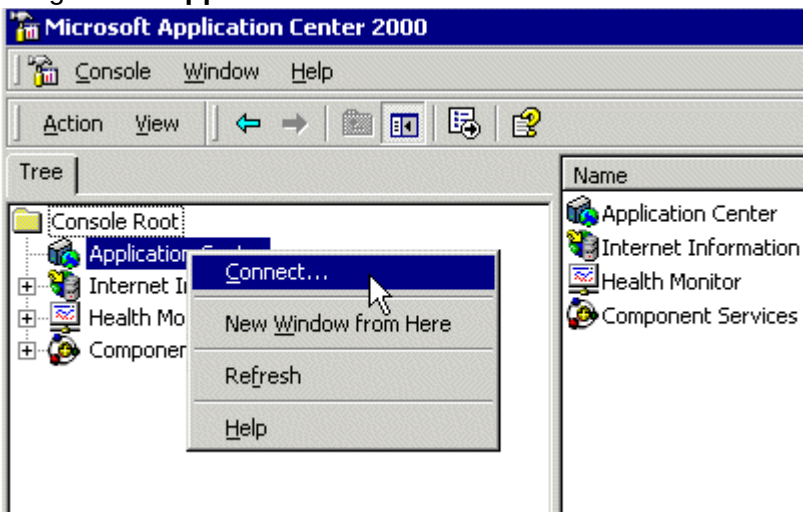
Connecting to the Staging Server's Application Center

To connect to Application Center on the staging server, follow these steps.

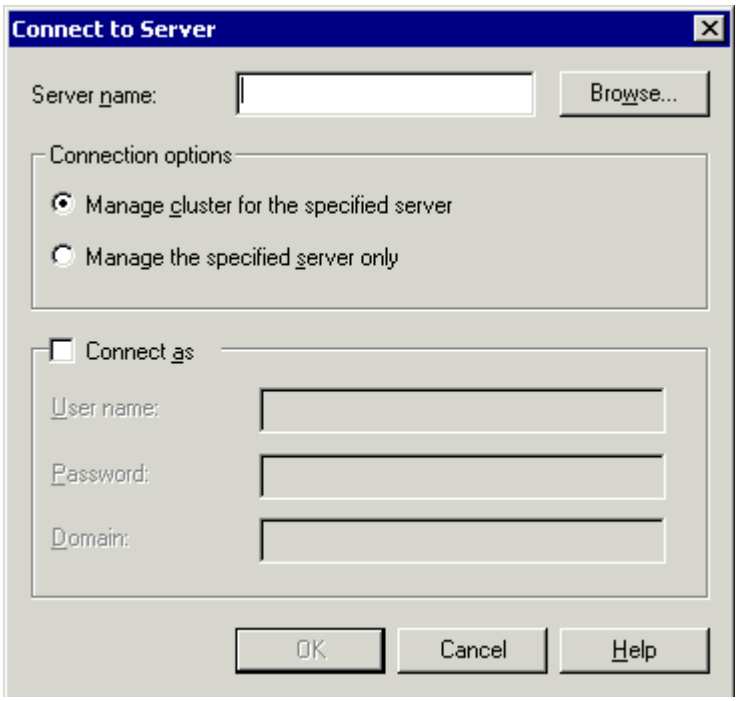
1. On the staging server, open Application Center.
2. The Application Center snap-in appears.



3. Right click **Application Center** and click **Connect...**



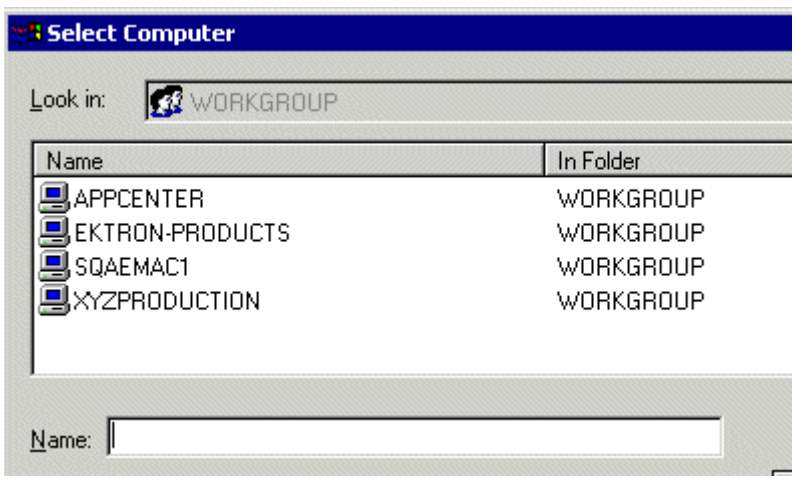
4. The Connect to Server dialog box appears.



5. Click **Browse** to locate the server you want to connect to.

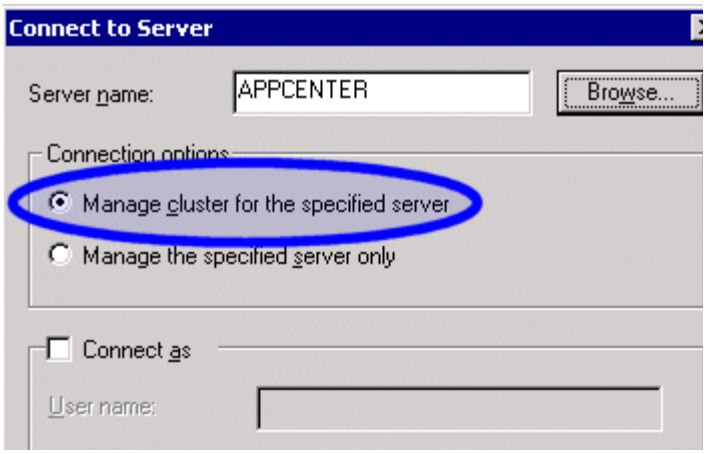
NOTE If you know the name of the server, you can type it into the Sever name field.

6. The Select Computer screen appears with a list of available servers.

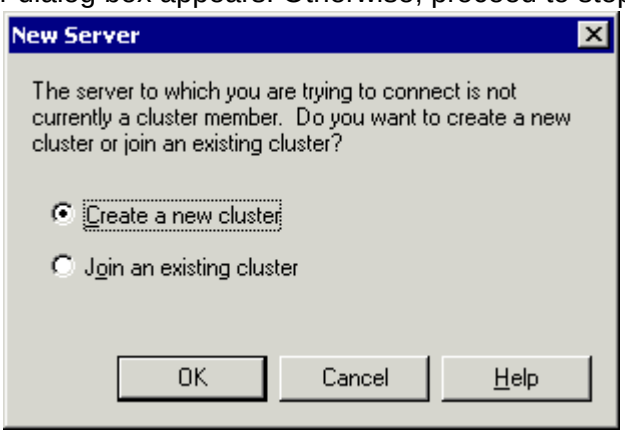


7. Select the Ektron CMS200/300 staging server, then click **OK**.

8. The select computer screen closes, and the Connect to Server screen contains the selected server's name.
9. Choose **Manage cluster for the specified server**.



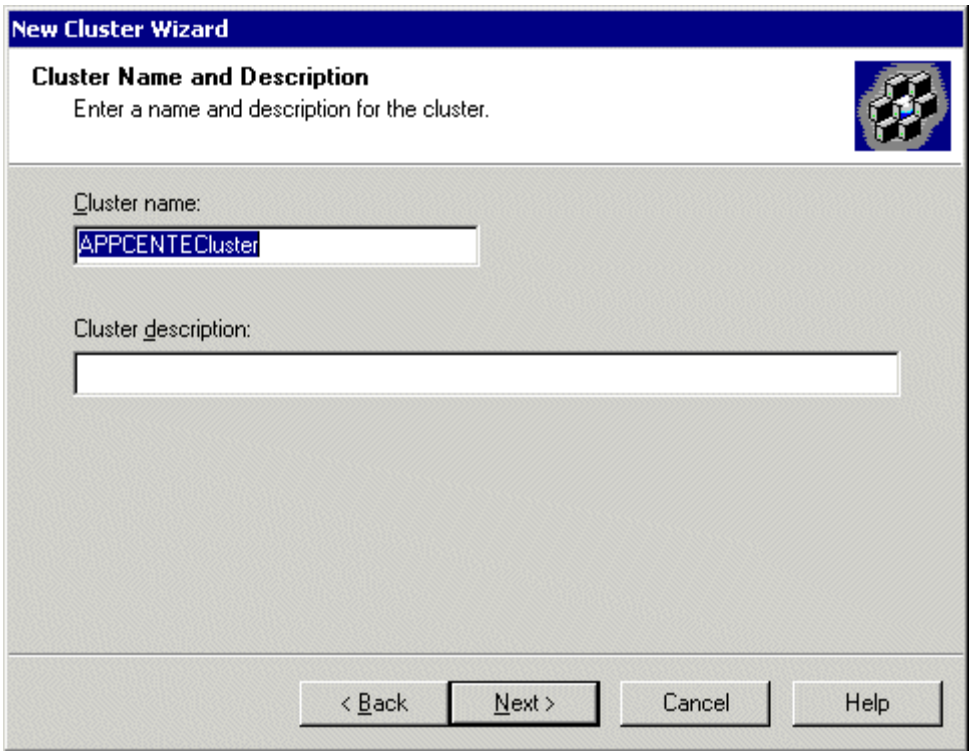
10. If needed, check the **Connect As** box and enter the proper information.
11. Click **OK** to submit the information and attempt to connect to Application Center.
12. If this is the first time you are connecting to the server, the New Server dialog box appears. Otherwise, proceed to step 15.



13. Choose **Create a new cluster** then click **OK.**

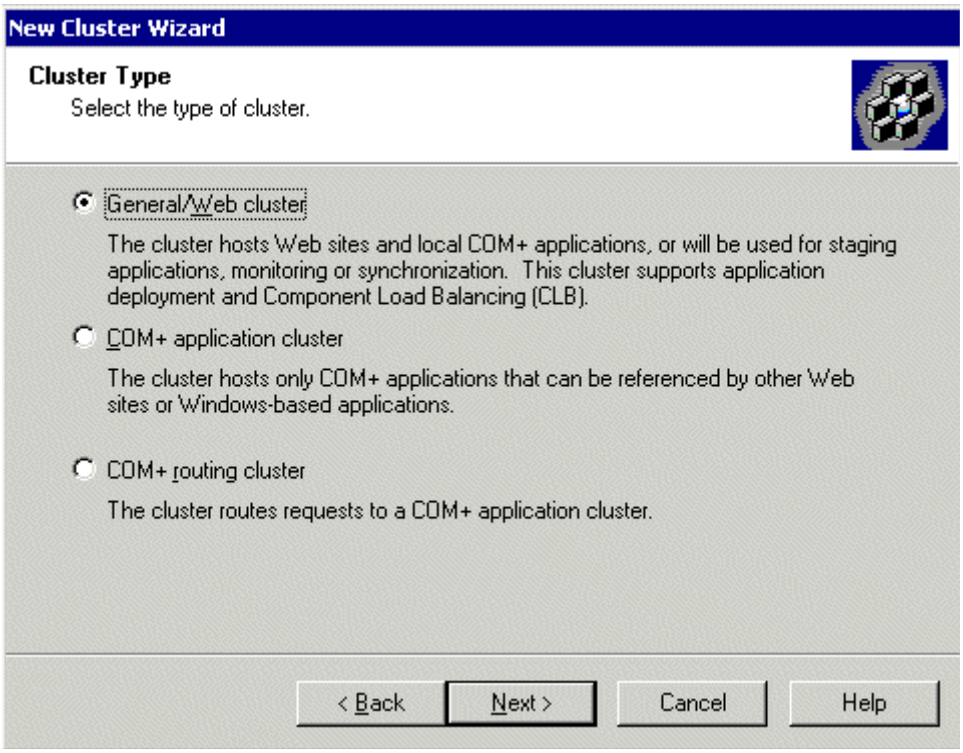
14. The New Cluster Wizard opens.

15. Click **Next**.
16. The wizard analyzes the server configuration and displays the Choose Name and Description screen.



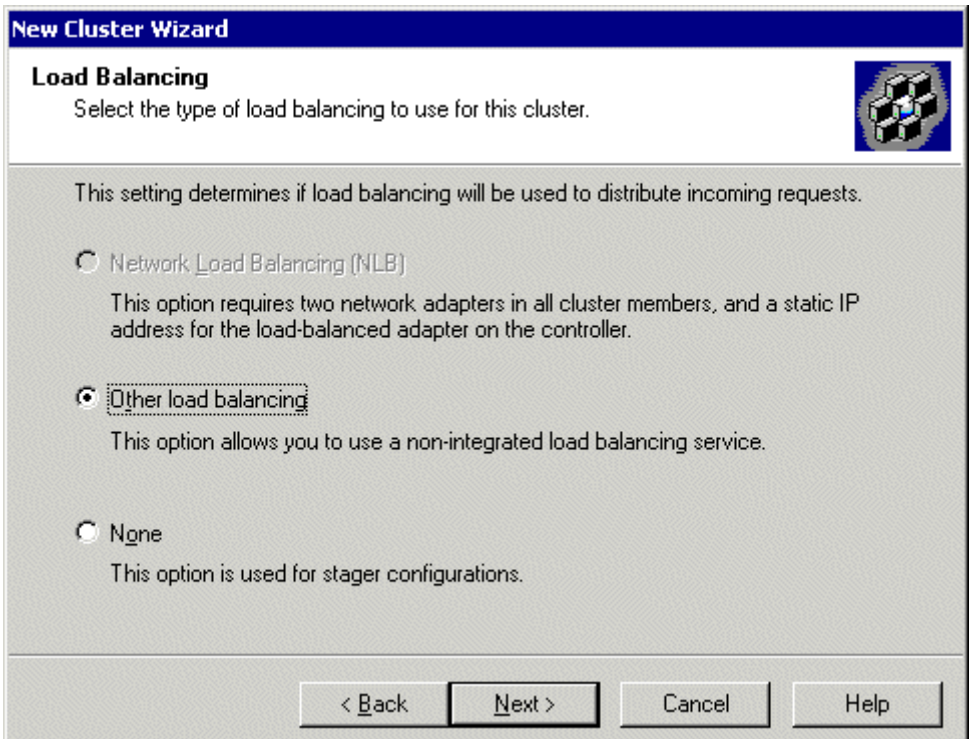
17. Give the new cluster a name and description, then click **Next**.

18. The Cluster Type screen appears.



19. Select **General/Web cluster** then click **Next**.

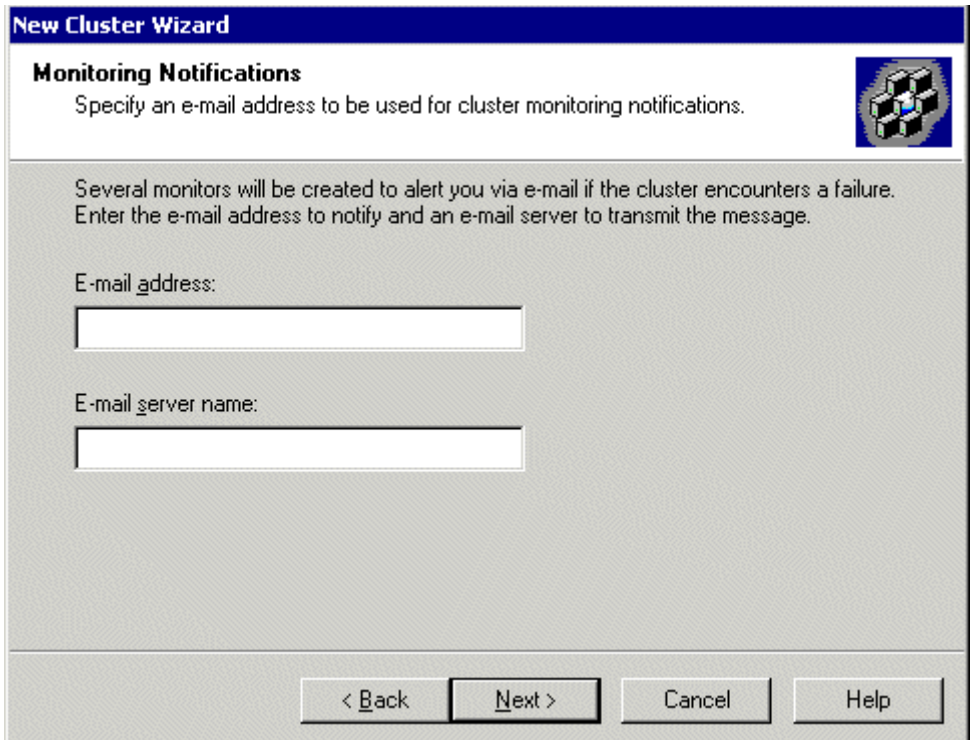
20. The Load Balancing screen appears.



21. Since load balancing is not required for the configuration, choose **None** and click **Next**.

NOTE If you are familiar with Load Balancing and Application Center, then you may choose another option.

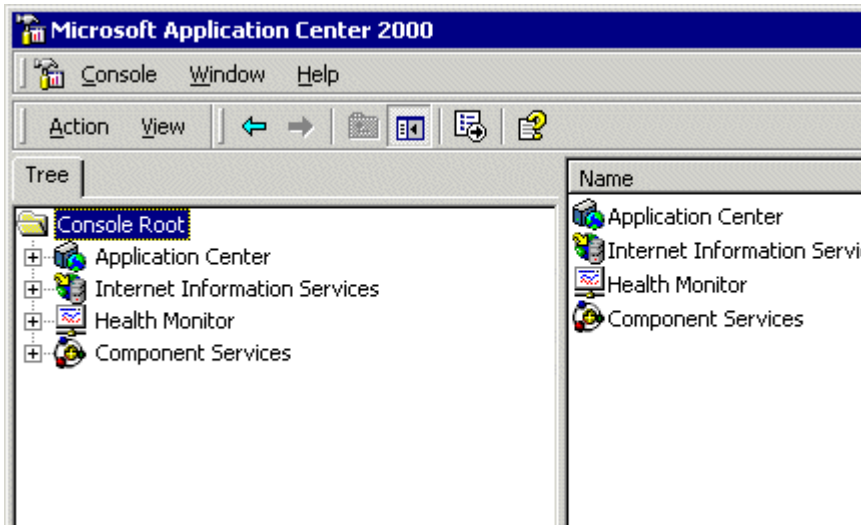
22. The Monitoring Notifications screen appears.



23. Enter a valid e-mail address and server name, then click **Next**.
24. The Completing the New Cluster Wizard screen appears.

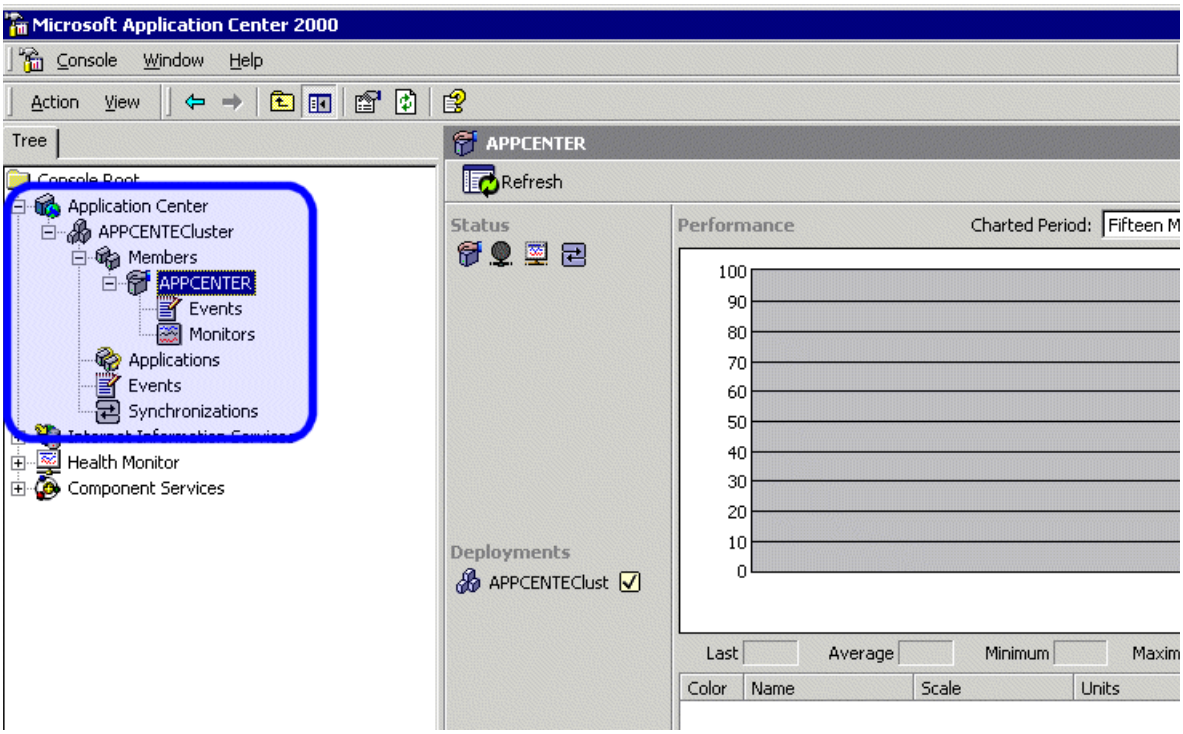
25. Click **Finish** to complete the wizard and connect to the Application Center.

26. The Application Center snap-in appears.



NOTE If you cannot connect, make sure all information is correct.

27. After expanding the Application Center tree, you should see a cluster with one member, the staging server.

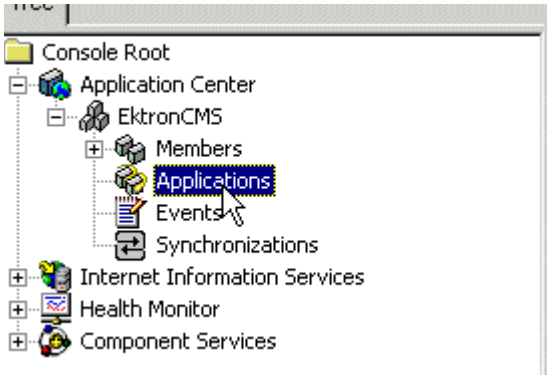


Now that you have connected to Application Center on the staging server, and created a cluster, you can configure the application settings for the cluster.

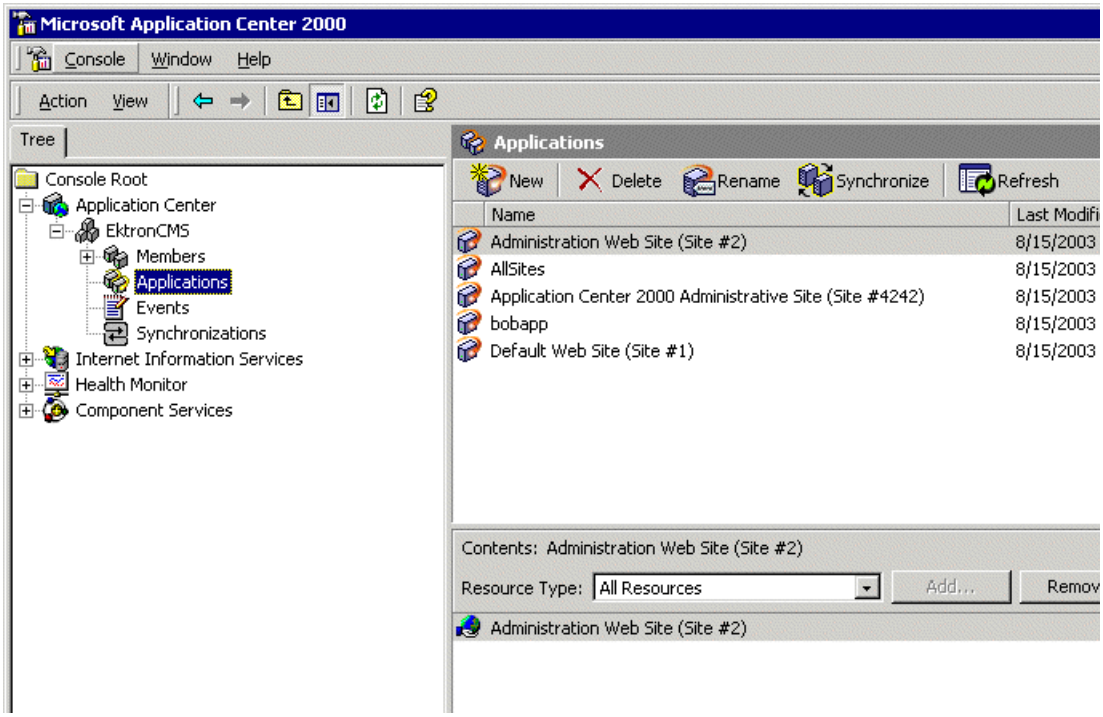
Configuring the Application Settings for the Cluster

To add Ektron CMS200/300 application information to the cluster, follow these steps.

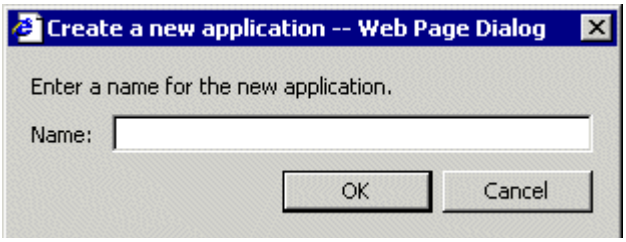
1. Connect to the cluster you created in ”Connecting to the Staging Server’s Application Center” on page 114.
2. Click **Applications** in the cluster tree.



3. The applications page appears on the right side of the snap-in.

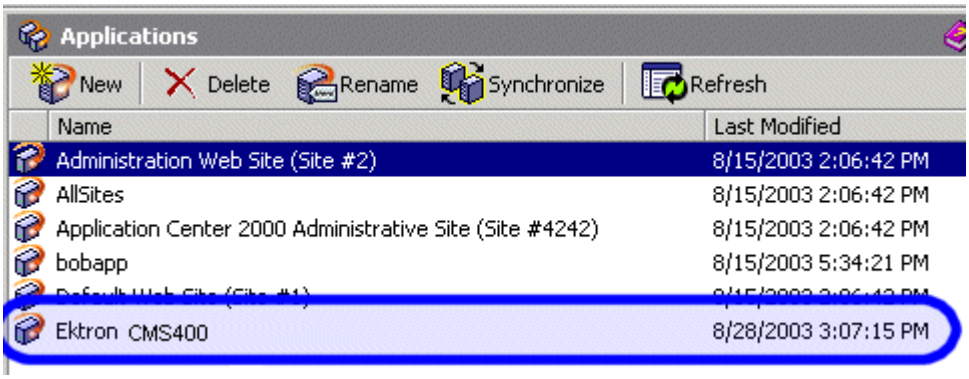


4. Click New ( ) in the toolbar at the top of the applications section.
5. The Create a New Application dialog box appears.



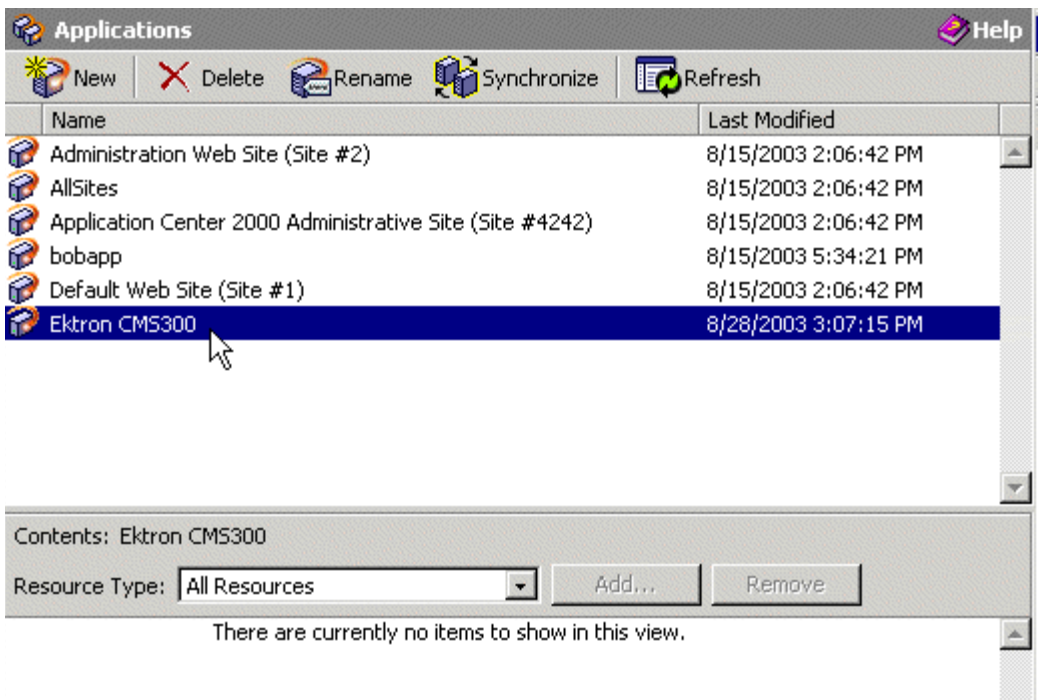
6. Enter a name for the new application in the displayed field and click **OK.**

7. The dialog box closes, and the applications list is updated with the new application.



Now that the application is added, you must add resources to it.

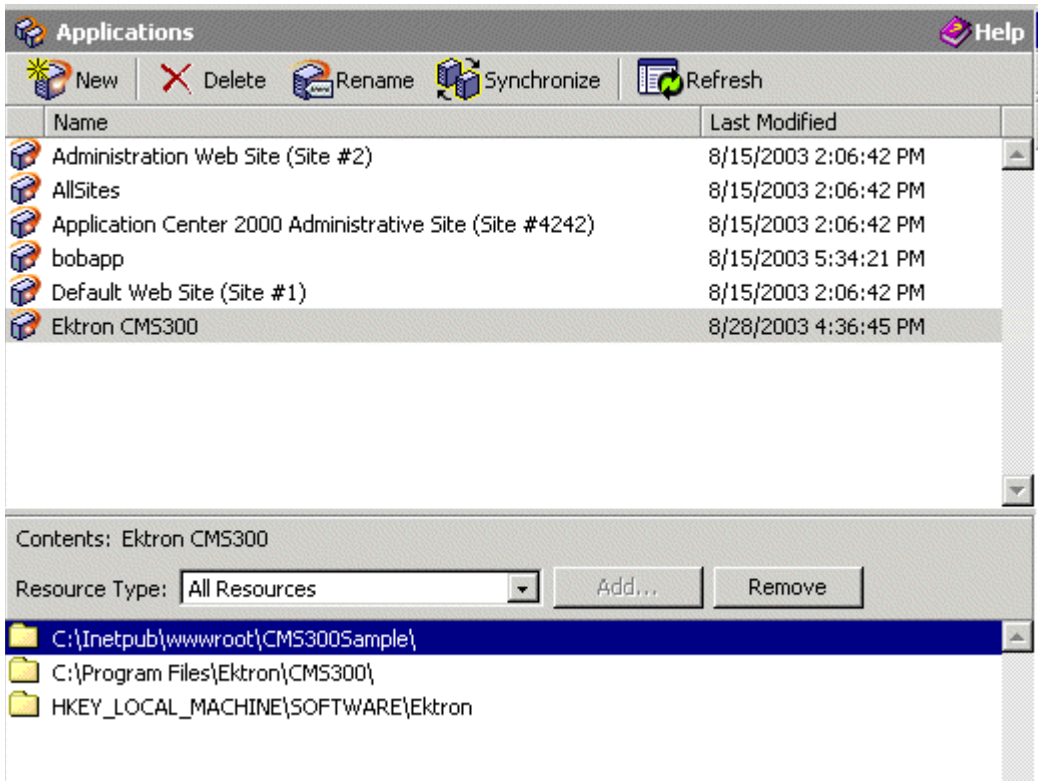
8. Click the Ektron CMS application that you created.
9. A list of resources assigned to the application appear in the lower right pane.



10. Use the following table to help you assign necessary resources to the application:

Resource Type	Folder Path	Description
Registry Keys	HKEY_LOCAL_MACHINE\SOFTWARE\Ektron	Registry keys for Ektron CMS200/300 to function properly.
File System Paths	C:\Inetpub\wwwroot\CMS200/300Sample\	Location of your Ektron CMS200/300 Web site.
File System Paths	C:\Program Files\Ektron\CMS200/300	Location of the necessary components for Ektron CMS200/300.

Displayed here is the result of adding these resources to the application.

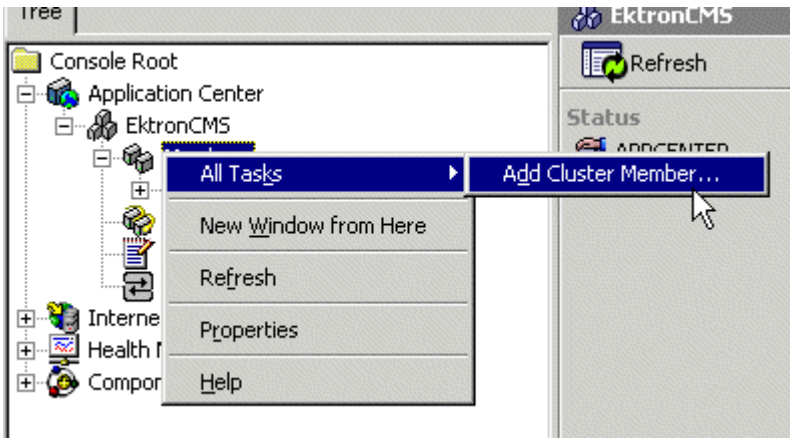


NOTE You can also add Registry keys, etc. here. The three resources listed above are *required*.

Adding the Production Server to the Cluster

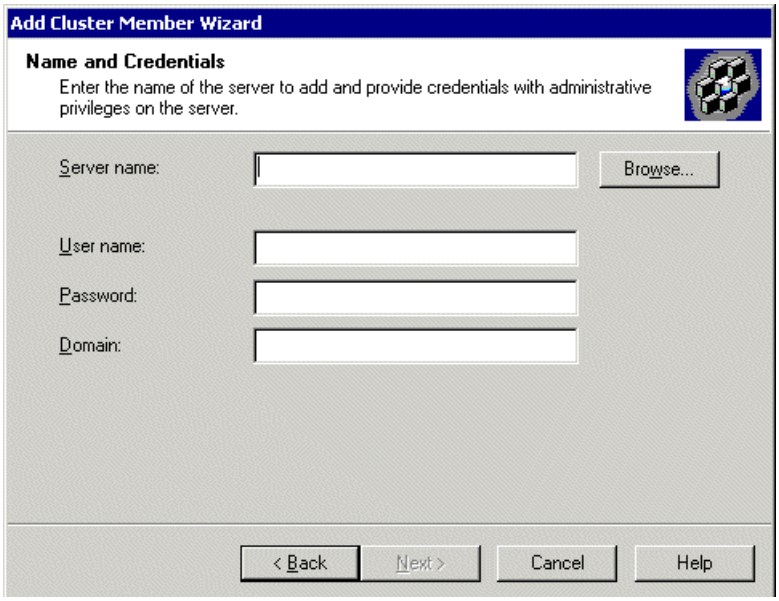
The next step in configuring Application Center on your staging server is to add the production server to the cluster. To do so, follow these steps.

1. Connect to the cluster you created in "Connecting to the Staging Server's Application Center" on page 114.
2. Right click **Members** in the cluster tree.
3. Click **All Tasks > Add Cluster Member**.



4. The Add Cluster Member Wizard opens. Click **Next** to proceed.

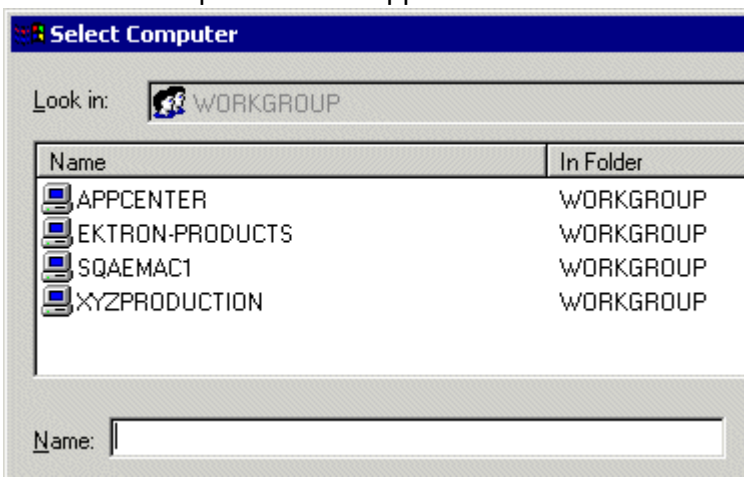
5. The Name and Credentials screen appears.



6. Click **Browse** to locate the server to add to the cluster.

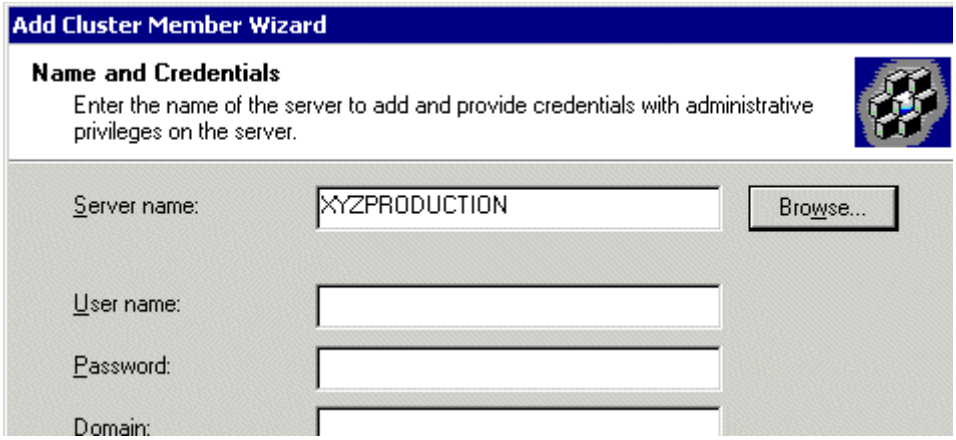
NOTE If you know the name of the server you want to connect to, enter the name of the server in the field and skip this step.

7. The Select Computer screen appears.

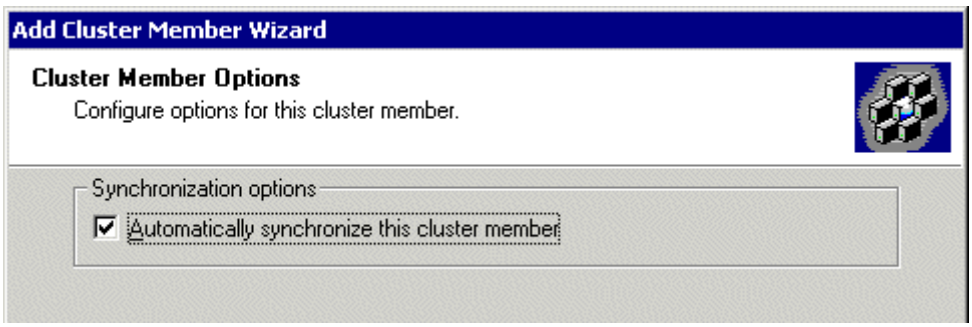


8. Select the Ektron CMS200/300 **Production Server** from the list of available servers, then click **OK.**

9. The select computer window closes, and the Name and Credentials screen appears with the selected computer in the Server Name field.

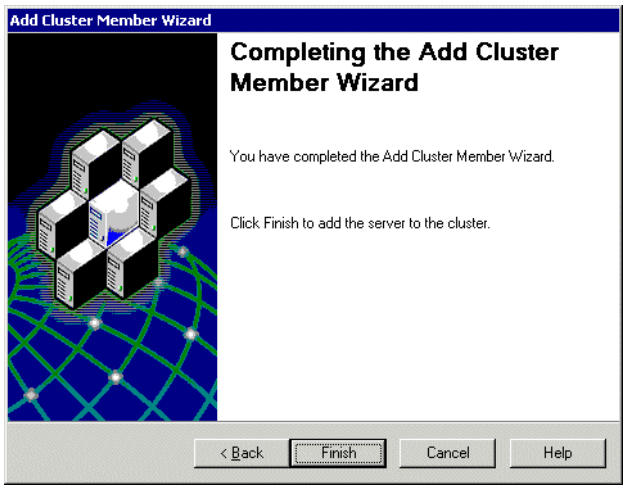


10. Enter the required information needed to successfully connect to the server then click **Next.**
11. Application Center analyzes the server configuration, and then displays the Cluster Member Options screen.

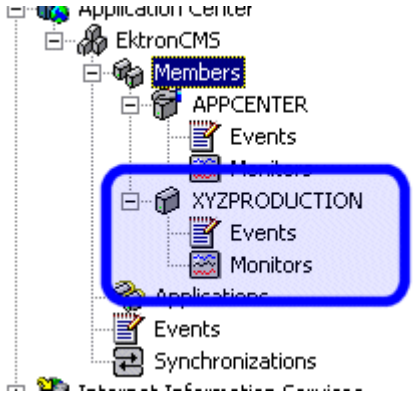


12. Leave the default and click **Next.**

13. The Completing the Add Cluster Member Wizard page appears.



14. Click **Finish** to complete the wizard and add the server to the cluster. The server is now a member of the cluster.



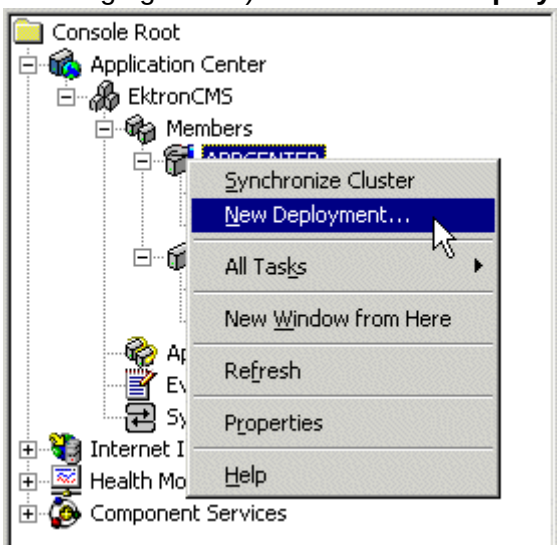
Now that the cluster is complete, you can now “push” files from the staging server to the production server.

Deploying the Files

Once the cluster has been configured properly, you can deploy Ektron CMS200/300 from the staging server to the production server.

To create a new deployment, follow these steps,

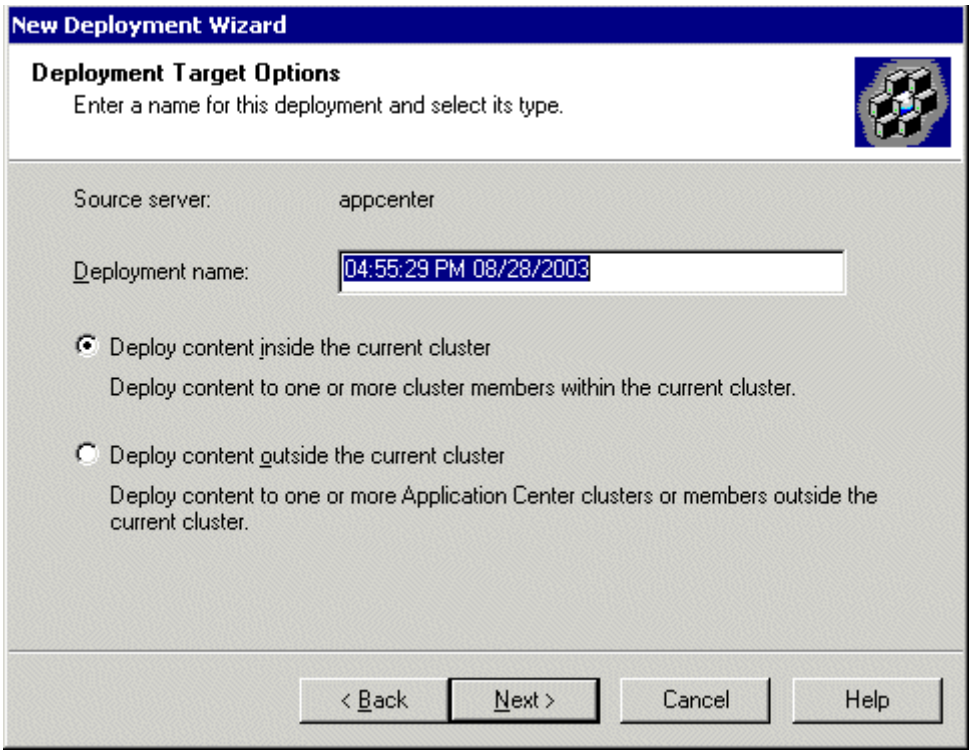
1. Connect to the cluster you created in "Connecting to the Staging Server's Application Center" on page 114.
2. Right click the cluster member acting as the cluster controller (which is the staging server) and click **New Deployment...**



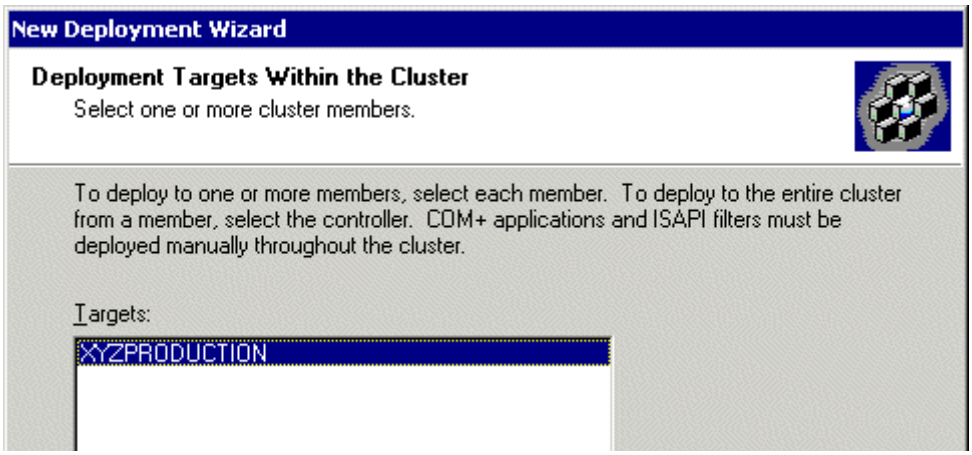
3. The New Deployment Wizard opens.

4. Click **Next** to proceed.

5. The Deployment Target Options screen appears.

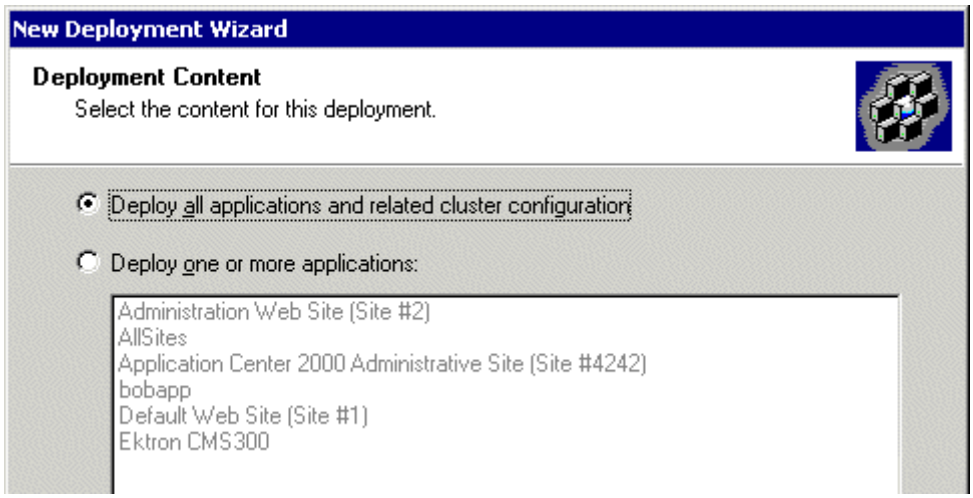


6. Enter a name for the deployment, or leave the default, choose the **Deploy content inside the current cluster** option, then click **Next**.
7. The Deployment Targets Within the Cluster screen appears.

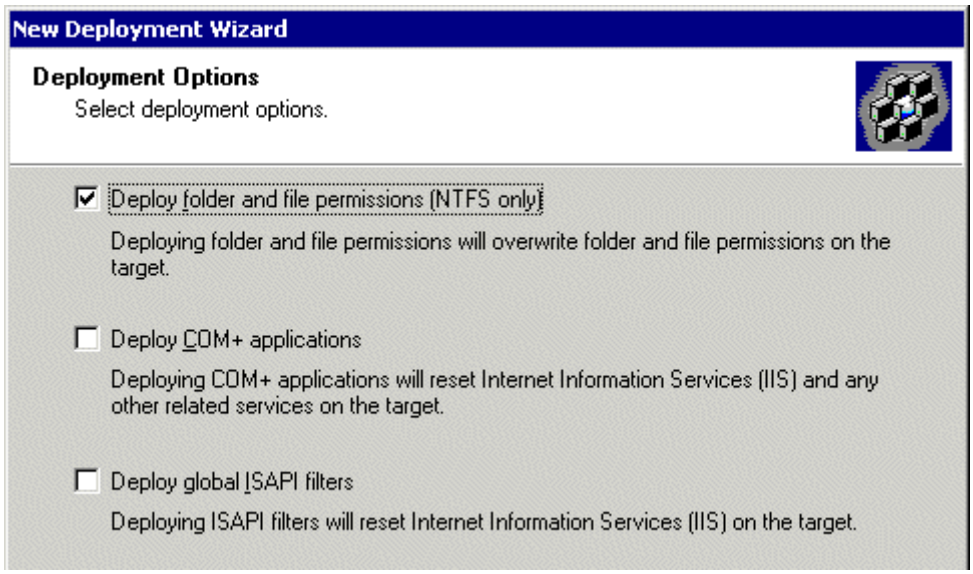


8. Select the targets to which to deploy the content, then click **Next**.

9. The Deployment Content page appears.



10. Either choose to **deploy All Applications** or choose the **One or More** option and select the Ektron CMS200/300 application from the list. Then click **Next**.
11. The Deployment Options screen appears.



12. Check off **Deploy Folder and File Permissions (NTFS Only)**, then click **Next.**

NOTE If desired, you can choose other options. However you must choose the first one.

13. The Completing the New Deployment Wizard screen appears.

14. Click **Finish** to complete the new deployment wizard.

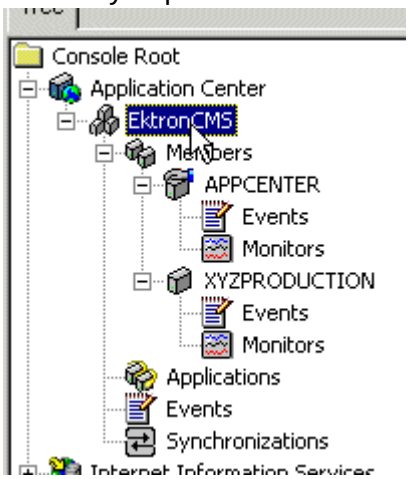
After you complete this initial deployment, all necessary files, registry keys, and DSNs have been copied to the production server in our cluster.

Viewing The Results

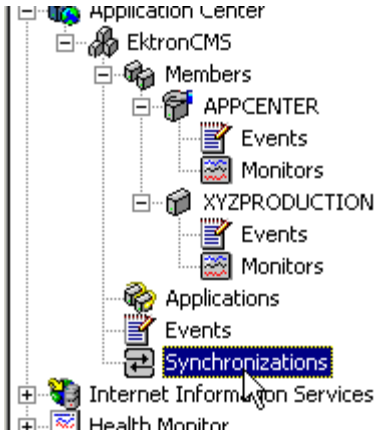
Each time an event occurs, a log is created in the Synchronizations section of Application Center.

To view the results of the initial deployment, follow these steps.

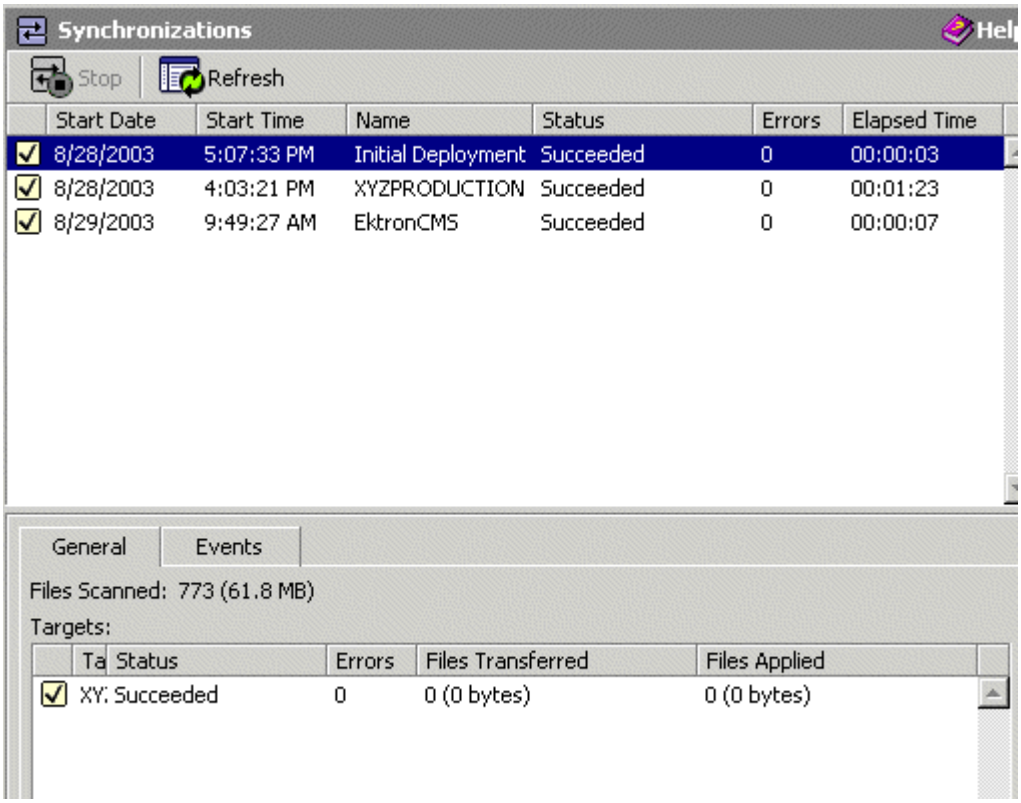
1. Connect to the cluster you performed the initial deployment on.



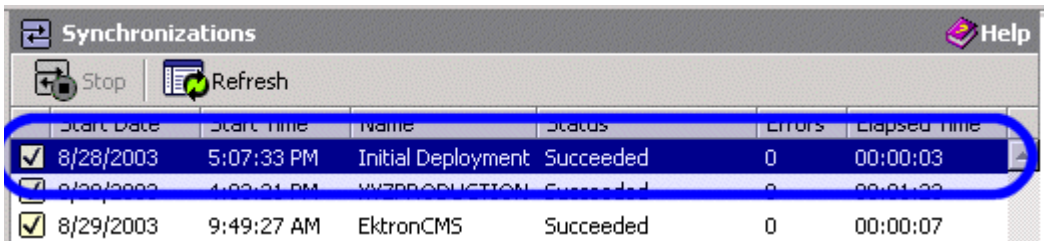
2. Click **Synchronizations** on the cluster tree.



3. The synchronization information appears on the right side of the screen.



4. The most recent record shows that the initial deployment task completed successfully.



Configuring the Production Server

Now that the staging server has been configured, and the initial deployment performed, you must perform these tasks to the Production server in the cluster:

- Create a blank MS-SQL database for Ektron CMS200/300
- Create a DSN for MS-SQL database

The following sections explain how to perform these tasks.

Before You Configure the Production Server

Before you configure the production server, be sure the following directories have been copied over during the initial deployment:

- `C:\Inetpub\wwwroot\CMS200/300Sample`
- `C:\Program Files\Ektron\CMS200/300`

Creating Blank MS-SQL Database

A blank MS-SQL database for Ektron CMS200/300 needs to be created on the production server. When the deployment configuration is complete, this database has a pull subscription to the database on the staging server.

For information about creating a blank database on the production server, use the steps in ”Run Database Setup Utility” on page 13. in step 4, choose **Minimal**.

NOTE The database name does not have to match the database name of the staging server.

Configuring MS-SQL Database

The last step in setting up the deployment model is to configure the MS-SQL databases on the staging and production servers.

In our model, the staging server’s database will publish content that the production server will subscribe to.

The following tasks must be performed to successfully configure the MS-SQL databases.

1. Register the production MS-SQL in the MS-SQL Enterprise Manager on the staging server (optional)

NOTE This step is not required, but is recommended to make managing the databases easier.

2. Configure the staging server’s database to be a publication database.

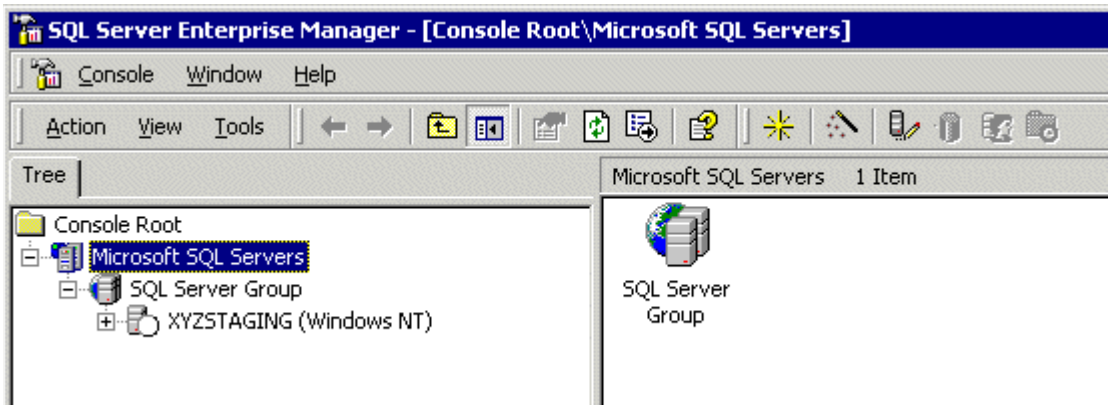
3. Configure the production server's database to subscribe to the staging server's database.
4. Perform an initial synchronization.

These steps are explained in the following sections.

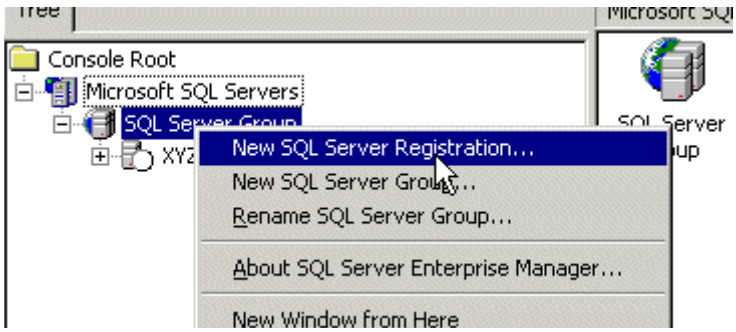
Registering Production Server's MS-SQL Server

By registering the production server's MS-SQL server in the staging server's MS-SQL Enterprise Manager, you can perform tasks on both services from one area instead of accessing both machines. To do so, follow these steps.

1. On the staging server, access the MS-SQL Enterprise manager.

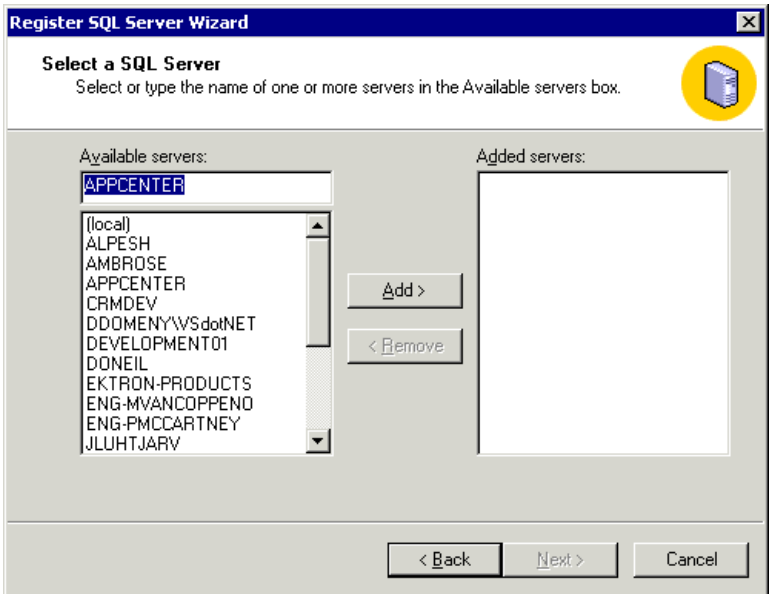


2. Right click **SQL Server Group** and click **New SQL Server Registration.**



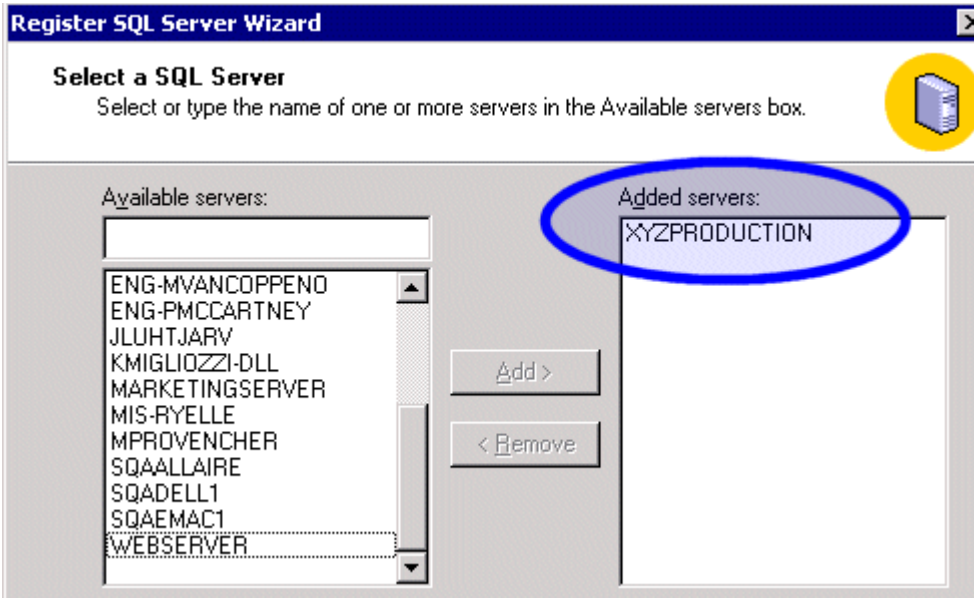
3. The Register SQL Server Wizard opens.

4. Click **Next**.
5. The Select SQL Server screen appears.

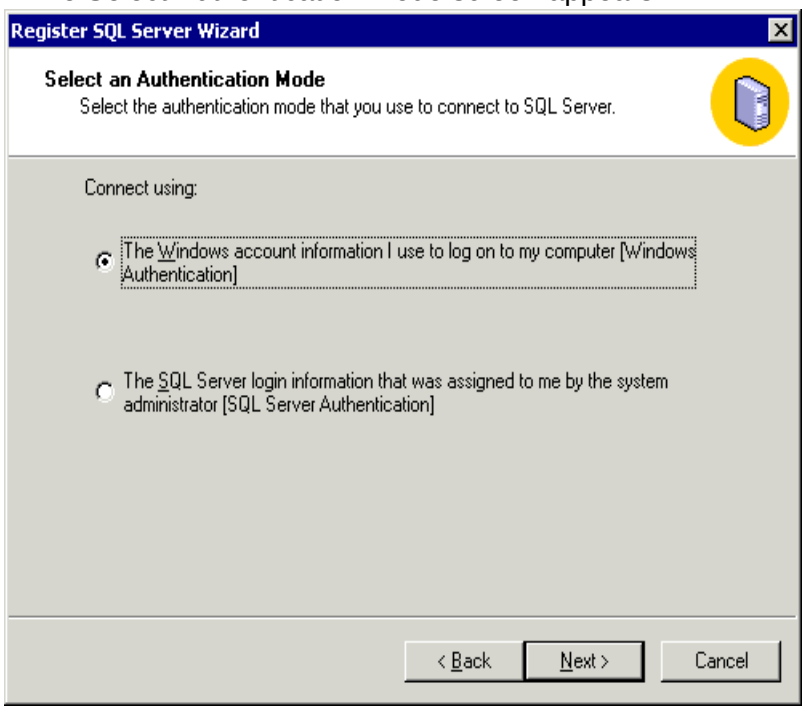


6. In the Available Servers list, select the name of the production server. Then click **Add.**

7. The production server appears in the Added Servers column.



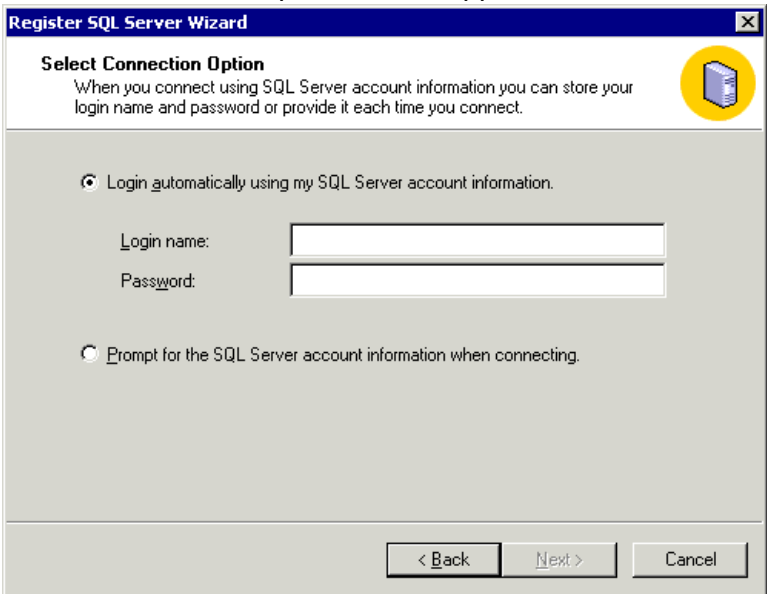
8. Click **Next**.
9. The Select Authentication Mode screen appears.



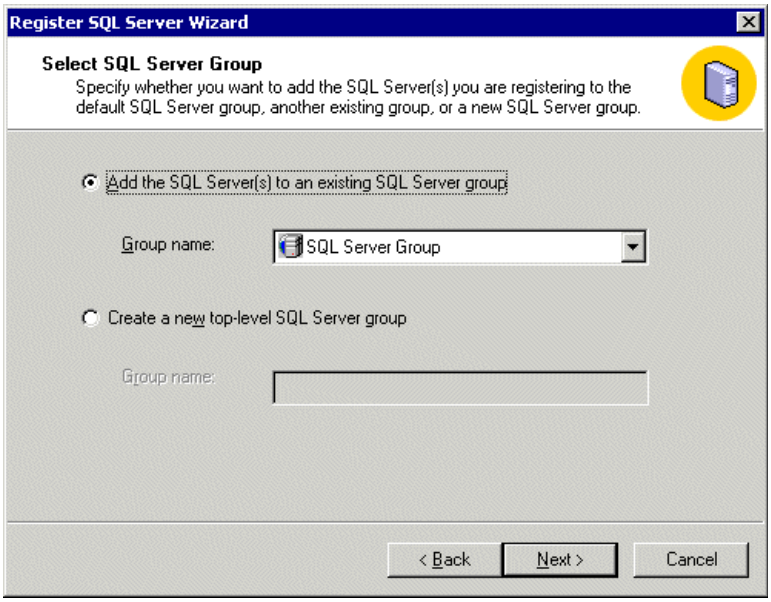
10. Choose the authentication mode you want to use. Then click **Next**.

NOTE This example uses SQL Server authentication. If you chose Windows Authentication, skip to step 14.

11. The Select Connection Option screen appears.



12. Choose the type of connection you want. Then, click **Next**.
13. The Select SQL Group screen appears.

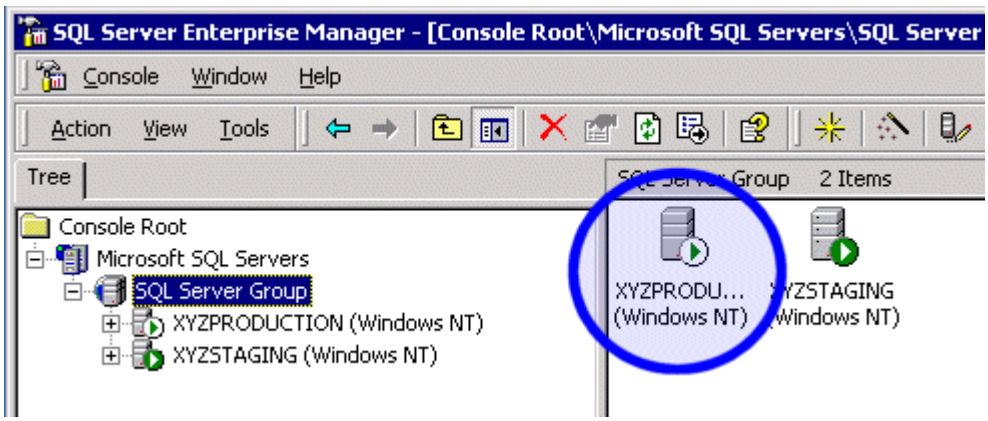


14. Choose the SQL Server group, or add a new one you want to register the new SQL server to. Then click **Next.**

NOTE This example adds the new SQL server to the default SQL Server group.

15. The Completing the Register SQL Server WIzard screen appears.

16. Click **Finish**.
17. The SQL Server is registered and a confirmation message appears.
18. Click **Close**.
19. The confirmation closes, and the new SQL Server is registered to the SQL Enterprise Manager



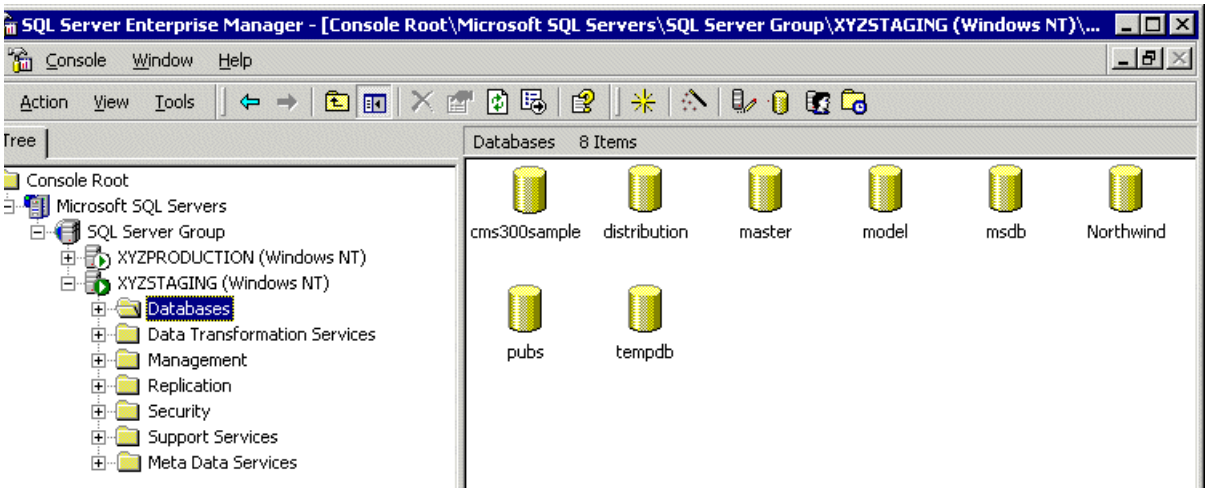
Now that the production server is registered, we can configure the two databases.

Configuring the Staging Server's Database

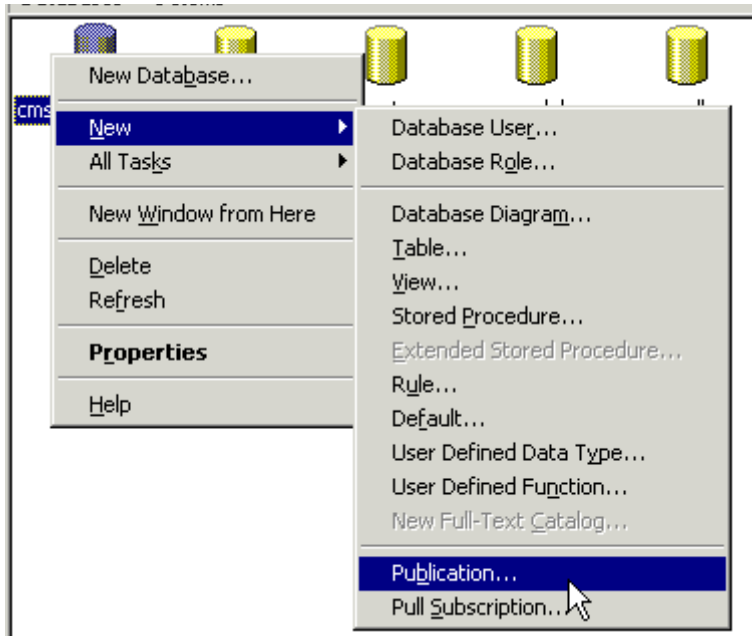
The staging server's database publishes all content in the Ektron CMS200/300 Web site. The production server's database pulls data from that database and stores it as well.

To configure the staging server's database to publish the data, follow these steps.

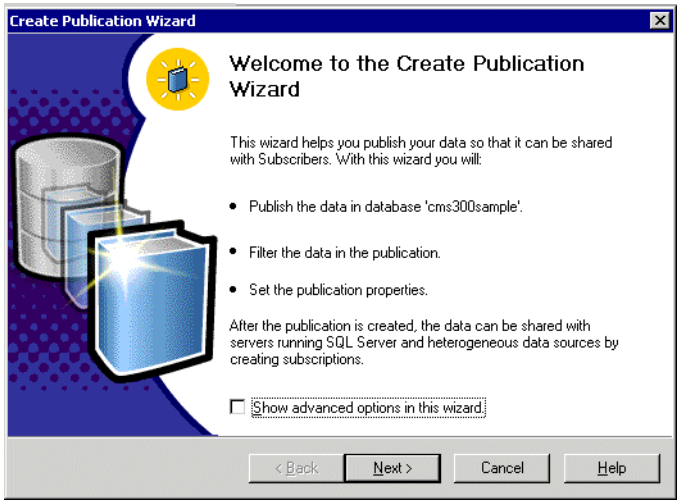
1. In the SQL Enterprise Manager on the staging server, connect to the staging server's SQL server and access the Databases folder.



2. Right click the **CMS200/300Sample** database and click **New > Publication...**

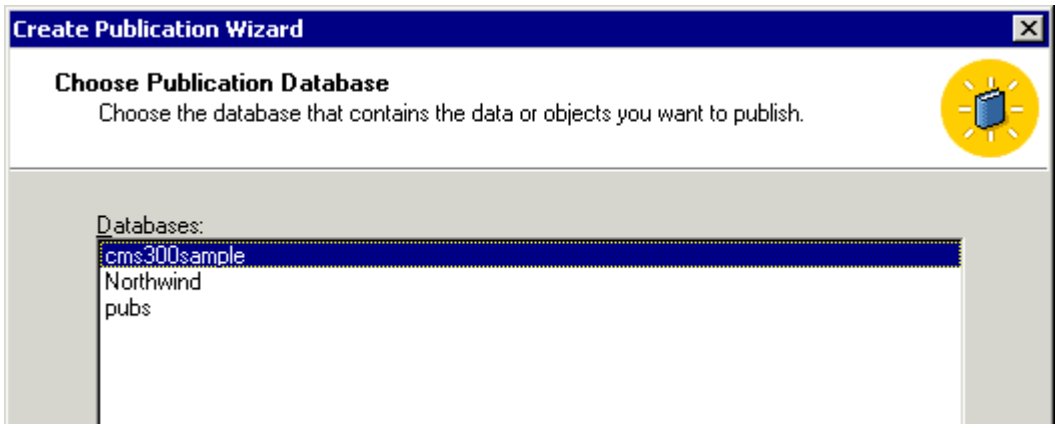


3. The Create Publication Wizard opens.

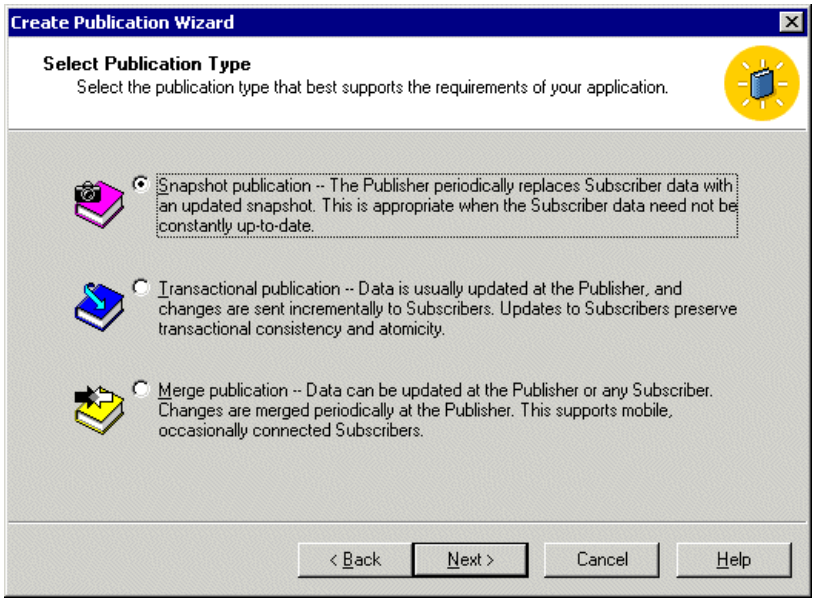


4. Click **Next** to begin.

5. The Choose Publication Database screen appears.

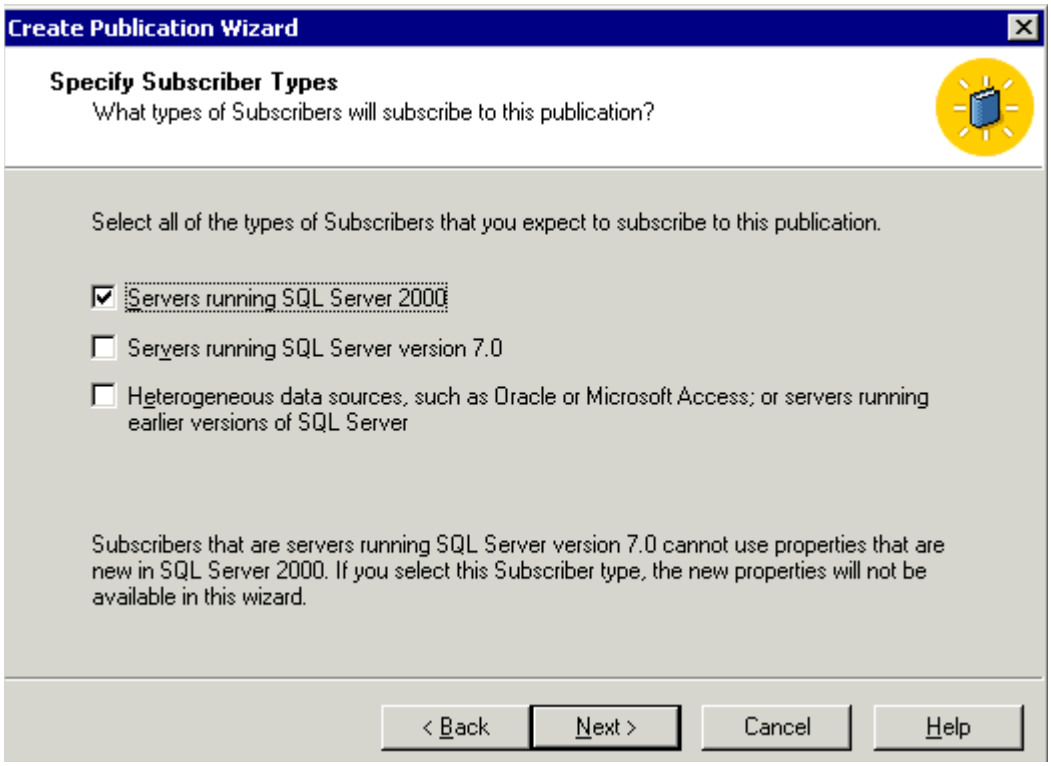


6. Choose the Ektron CMS200/300 database and click **Next.**
7. The Select Publication Type screen appears.



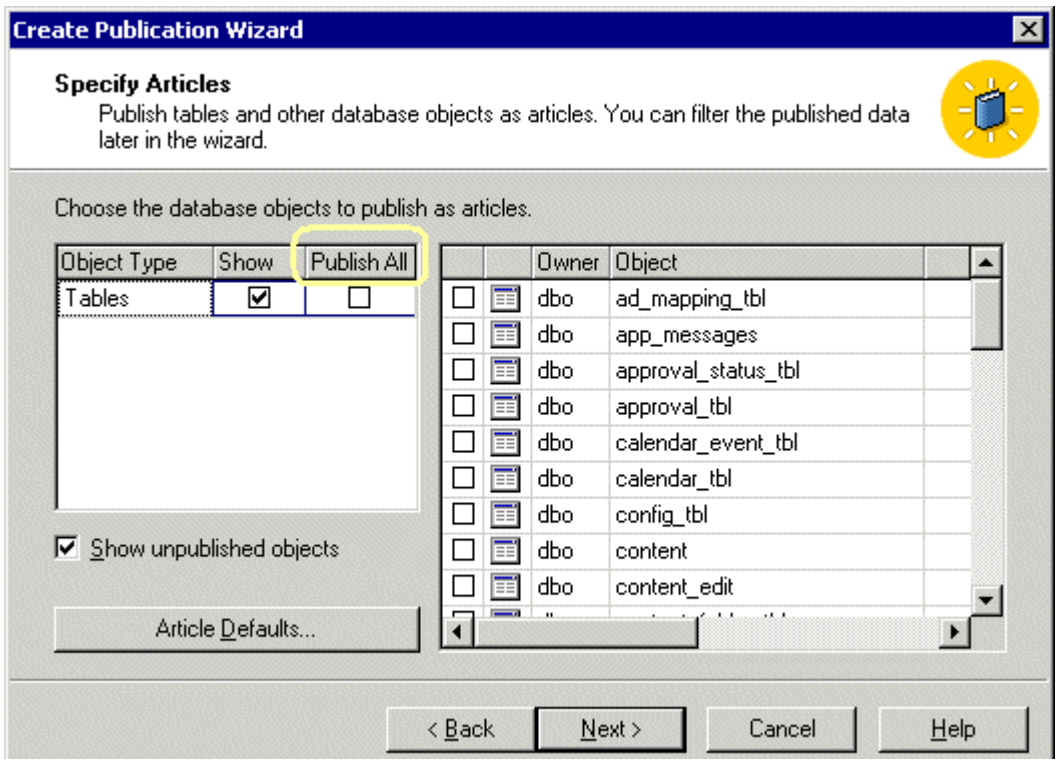
8. Choose **Snapshot Publication** then click **Next**.

9. The Specify Subscriber Types screen appears.



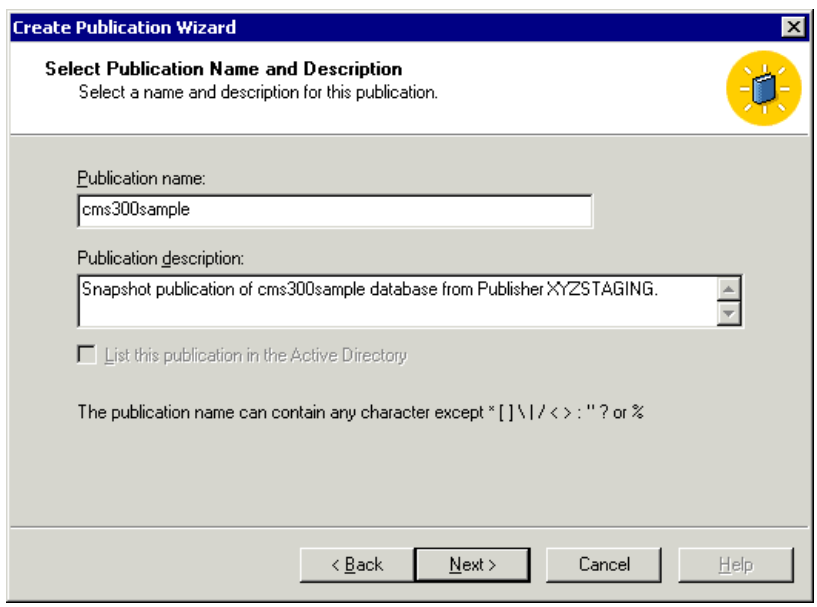
10. Check the box next to the version of MS-SQL that the production server is running and click **Next**.

11. The Specify Articles screen appears. Check the **Publish All** option.

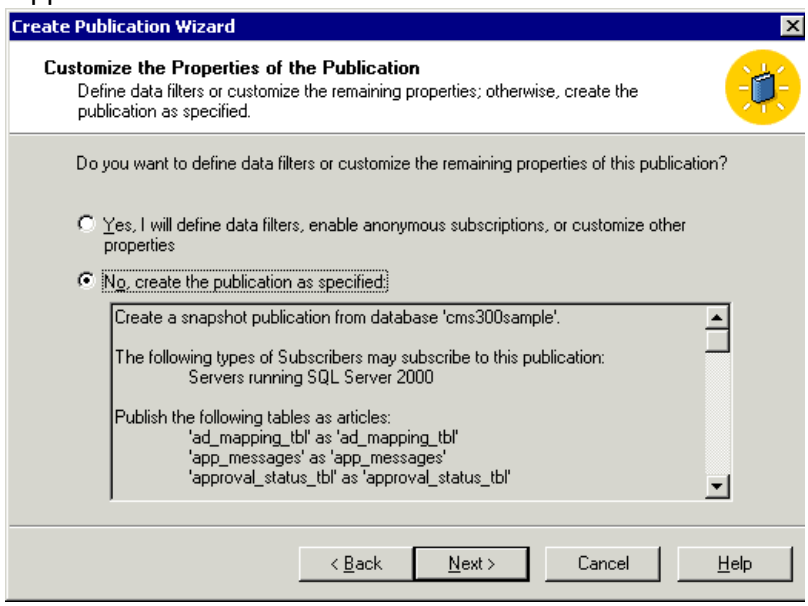


12. Click **Next** to continue.

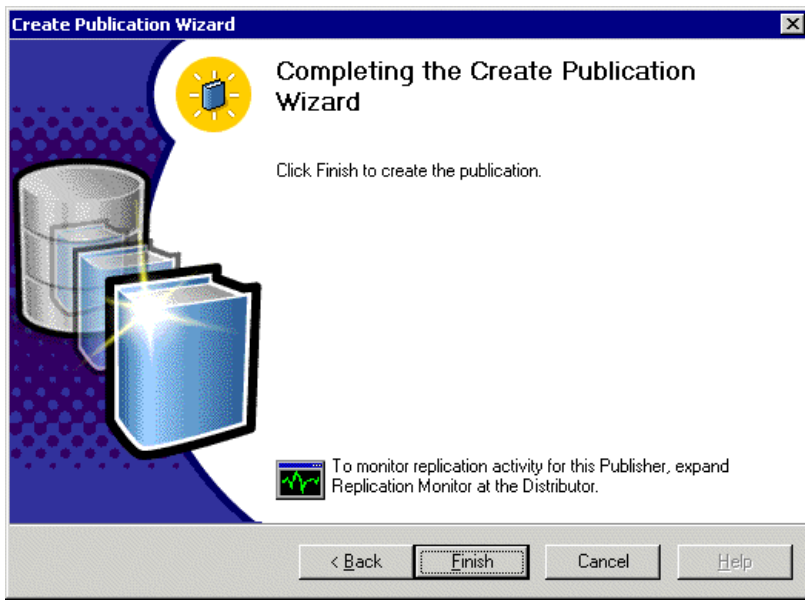
13. The Select Publication Name and Description page appears.



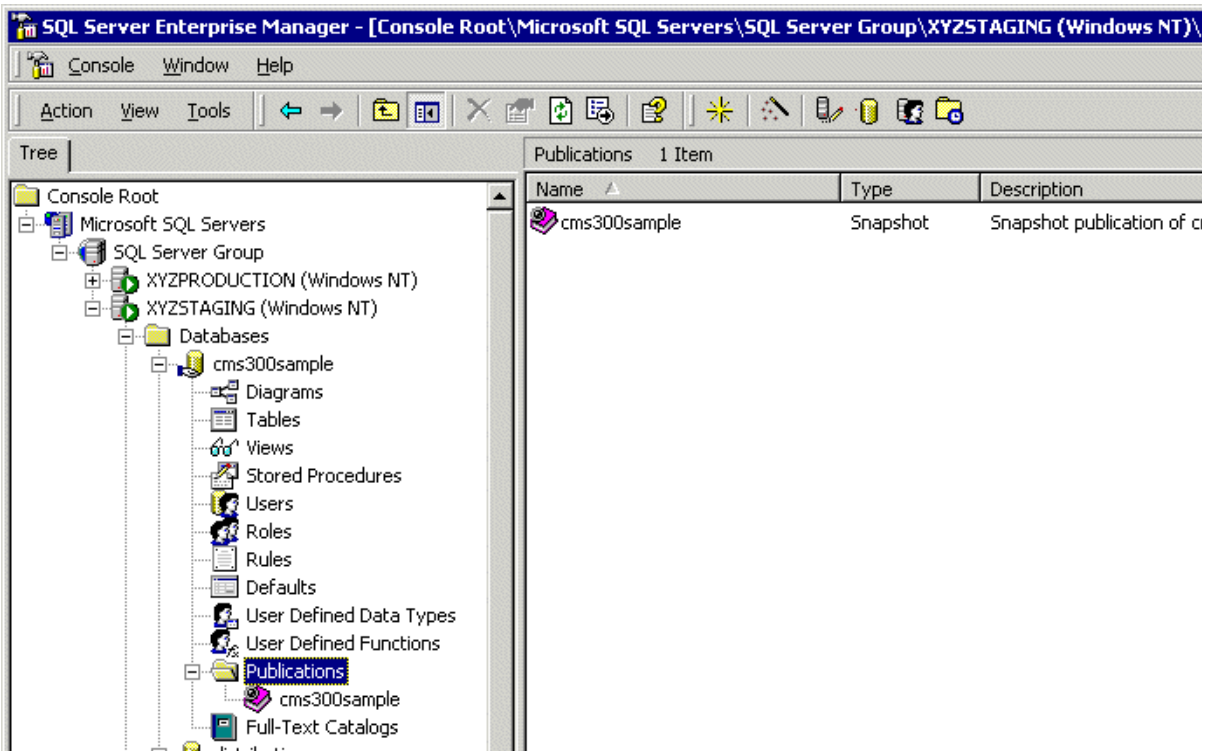
14. Enter a name and description for the publication, then click **Next**.
15. The Customize the Properties of the Publication screen appears.



16. Choose **No, Create the publication as specified** then click **Next.**
17. The Completing the Create Publication Wizard screen appears.



18. Click **Finish.**
19. A Publications folder is added to the database tree, and the new publication is added to it.

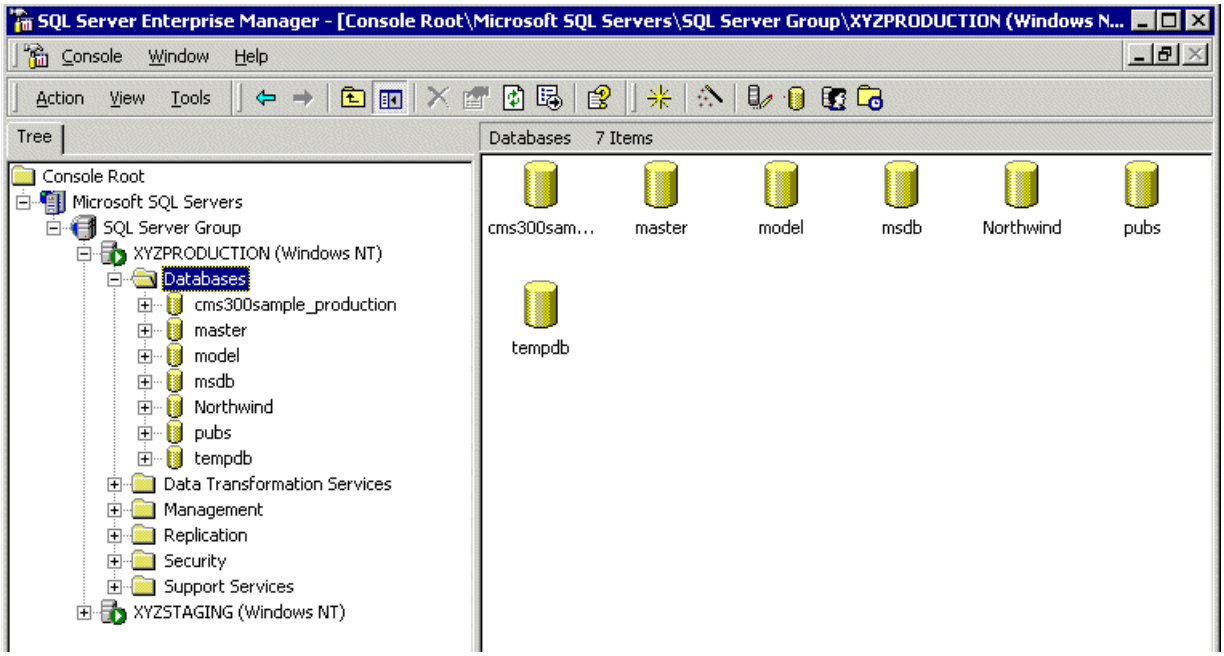


Now that the staging server's database is configured as a publication database, we can configure the production database to subscribe to it.

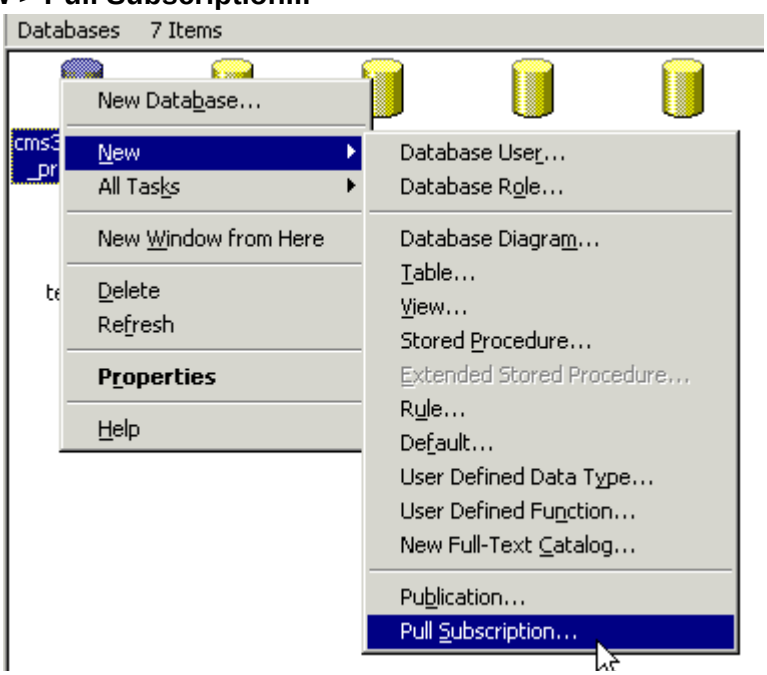
Configuring the Production Server's Database

To configure the production server's database to subscribe to the staging server's database, follow these steps.

1. On the staging server's SQL Server Manager, connect to the production server's SQL server and access the databases folder.

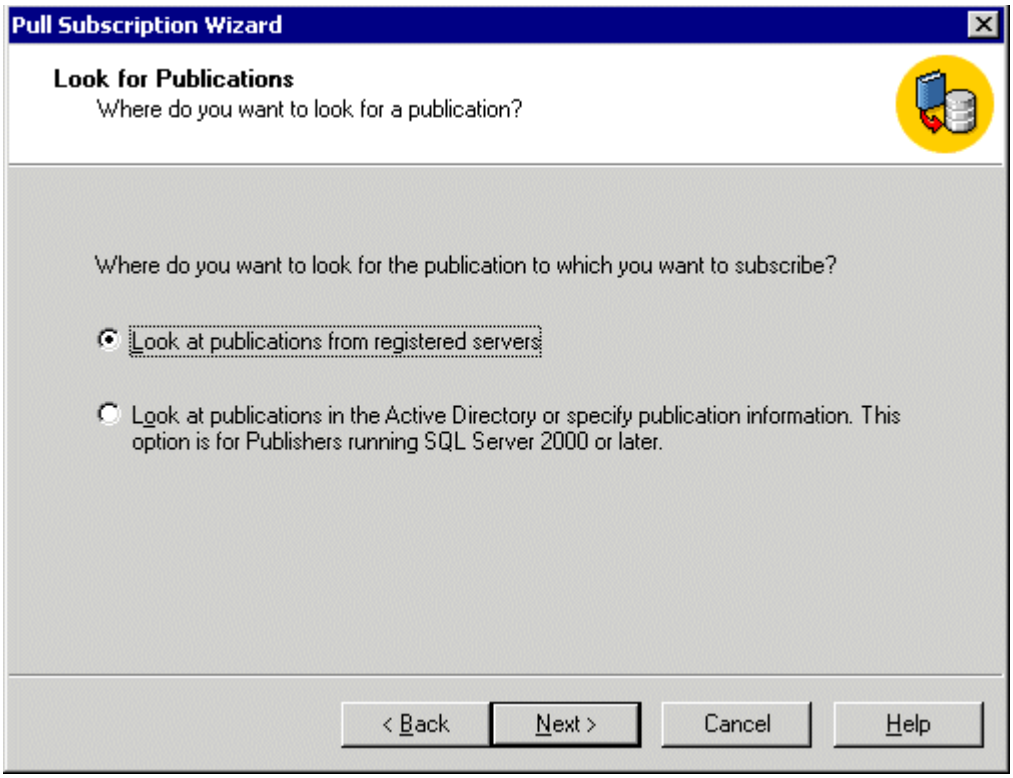


2. Right click the blank Ektron CMS200/300 database and click **New > Pull Subscription...**



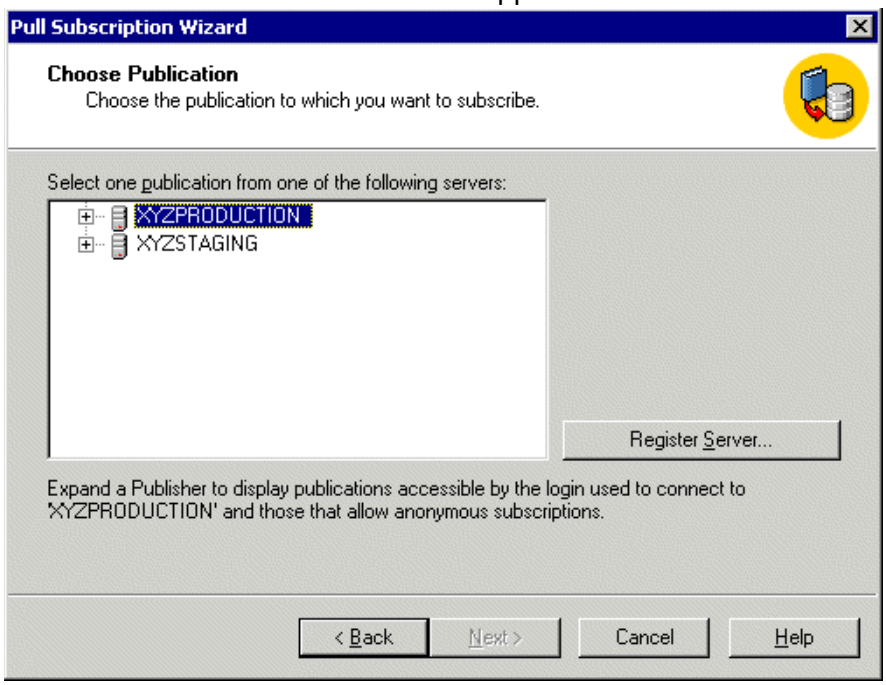
3. The Pull Subscription Wizard opens. Click **Next** to begin.

4. The Look for Publications screen appears.

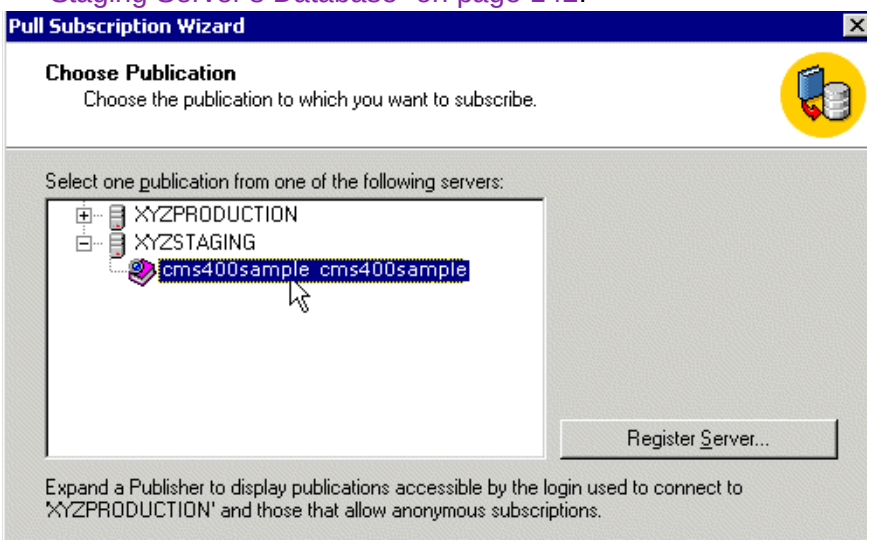


5. Choose **Look at publications from registered servers** and click **Next**.

6. The Choose Publication screen appears.



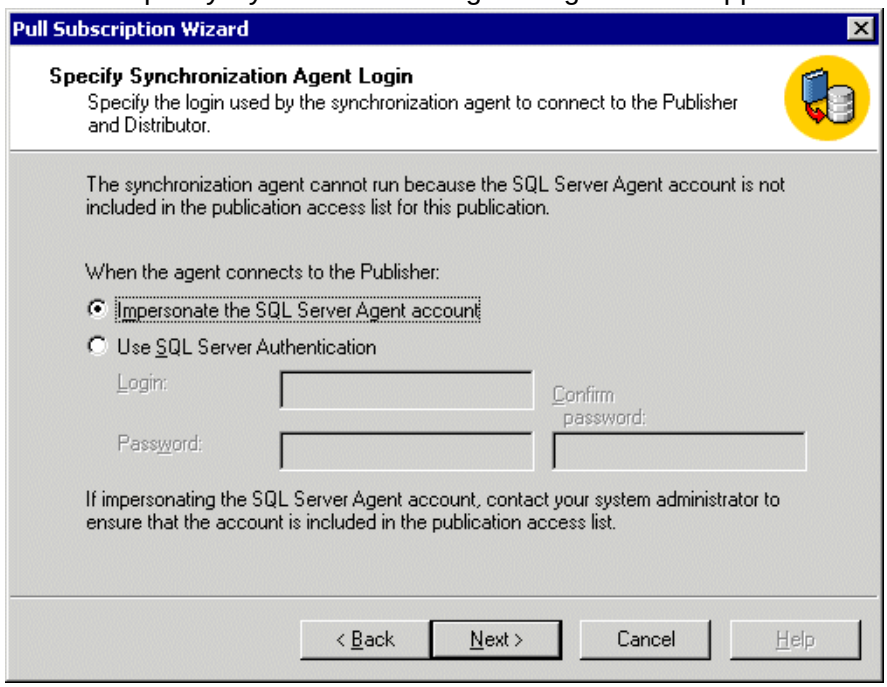
7. Expand the Staging Server's tree and select the Ektron CMS200/300 Publication that was created in "Configuring the Staging Server's Database" on page 142.



NOTE If the Ektron CMS200/300 publication does not appear under the staging server, make sure the publication was created properly.

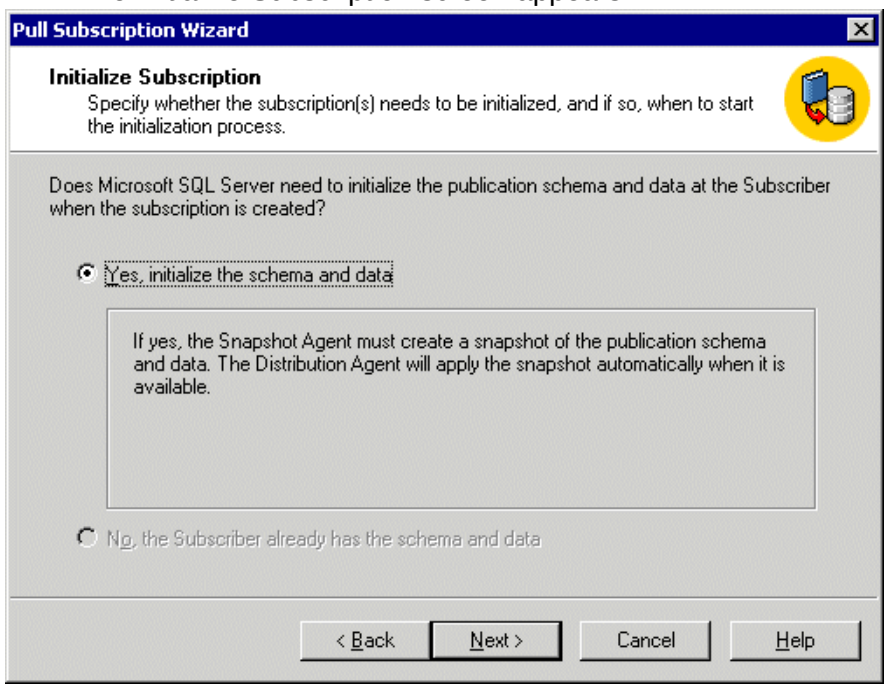
8. Click **Next** to continue.

9. The Specify Synchronization Agent Login screen appears.

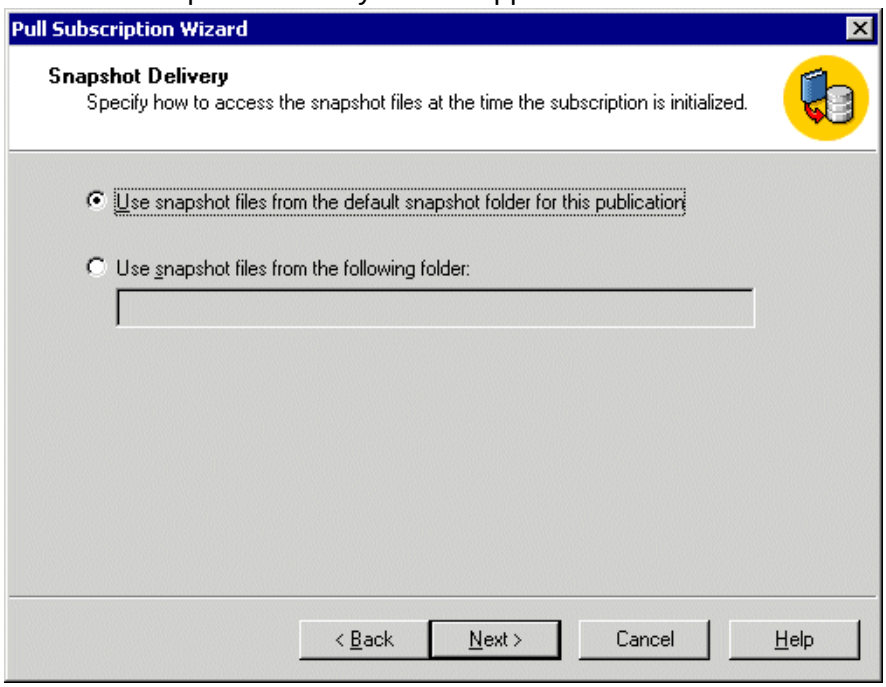


10. Choose which option you want to use to connect to the publisher. Then, click **Next**.

11. The Initialize Subscription screen appears.

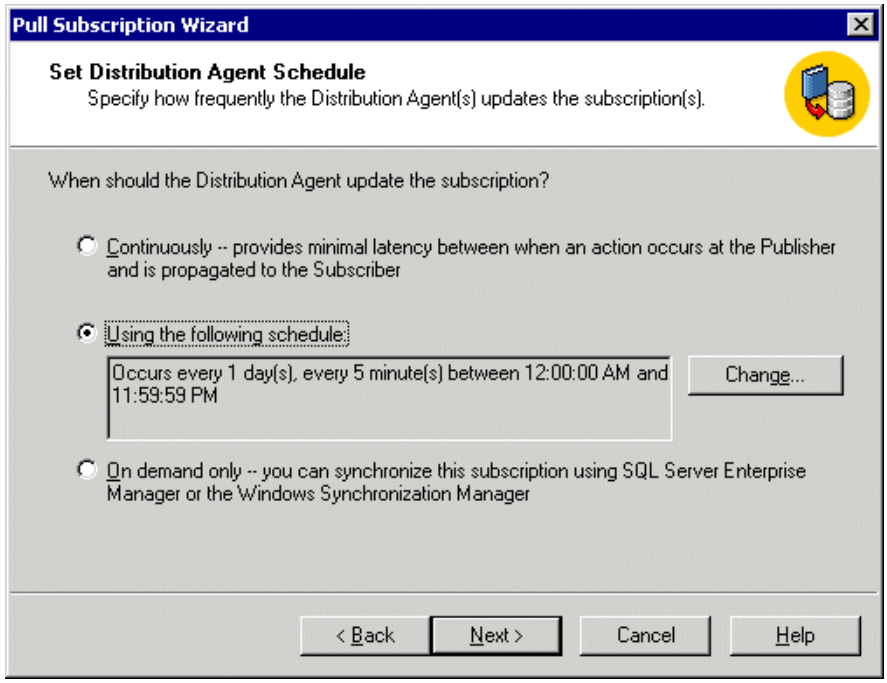


12. Choose **Yes, initialize the schema and data**, then click **Next.**
13. The Snapshot Delivery screen appears.



14. Choose **Use snapshot files from the default snapshot folder for this publication.** Then, click **Next**.

15. The Set Distribution Agent Schedule screen appears.



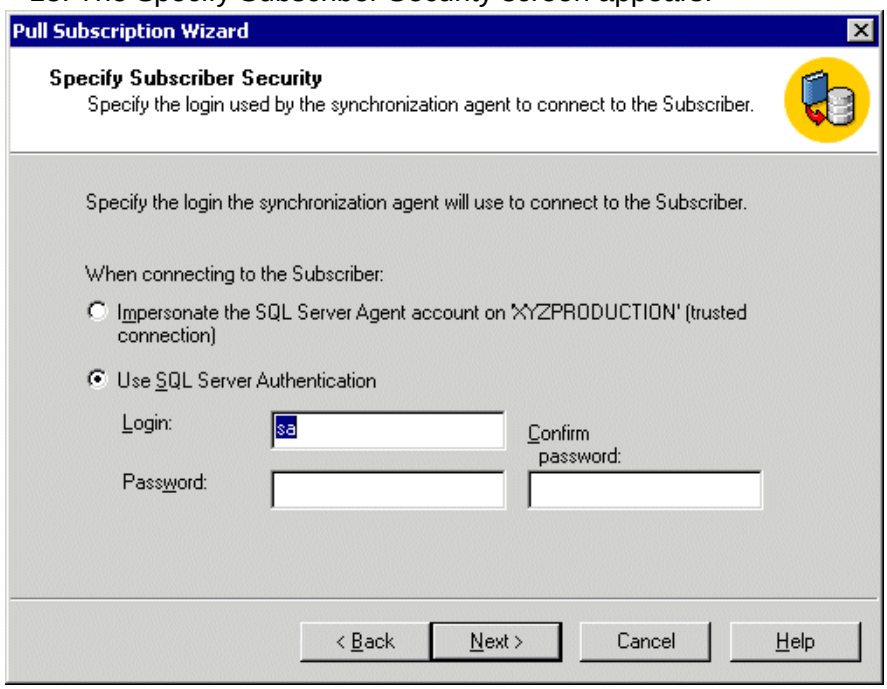
16. Choose an option using the following table for reference.

Option	Result
Continuously	Propagates data modifications between Publisher and Subscriber immediately.
Schedule	Runs the Distribution Agent hourly (default), or daily, weekly, or monthly. Choosing a frequency other than **Continuously** increases the latency between the Subscriber and Publisher.
On-Demand	Run the Distribution Agent only when specifically requested.

For demonstration purposes, we choose **On-Demand** so we can synchronize the databases with a click of a button

17. Click **Next** to continue.

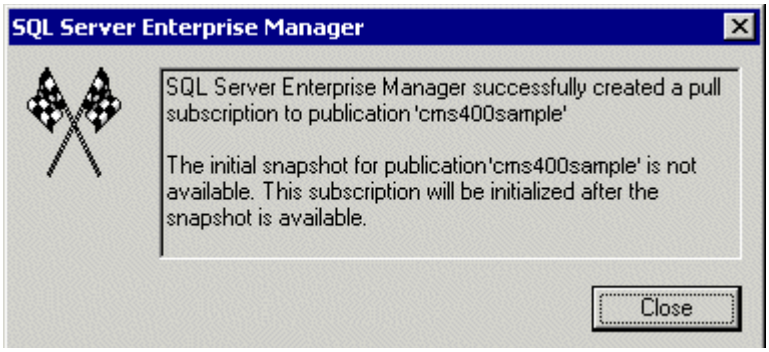
18. The Specify Subscriber Security screen appears.



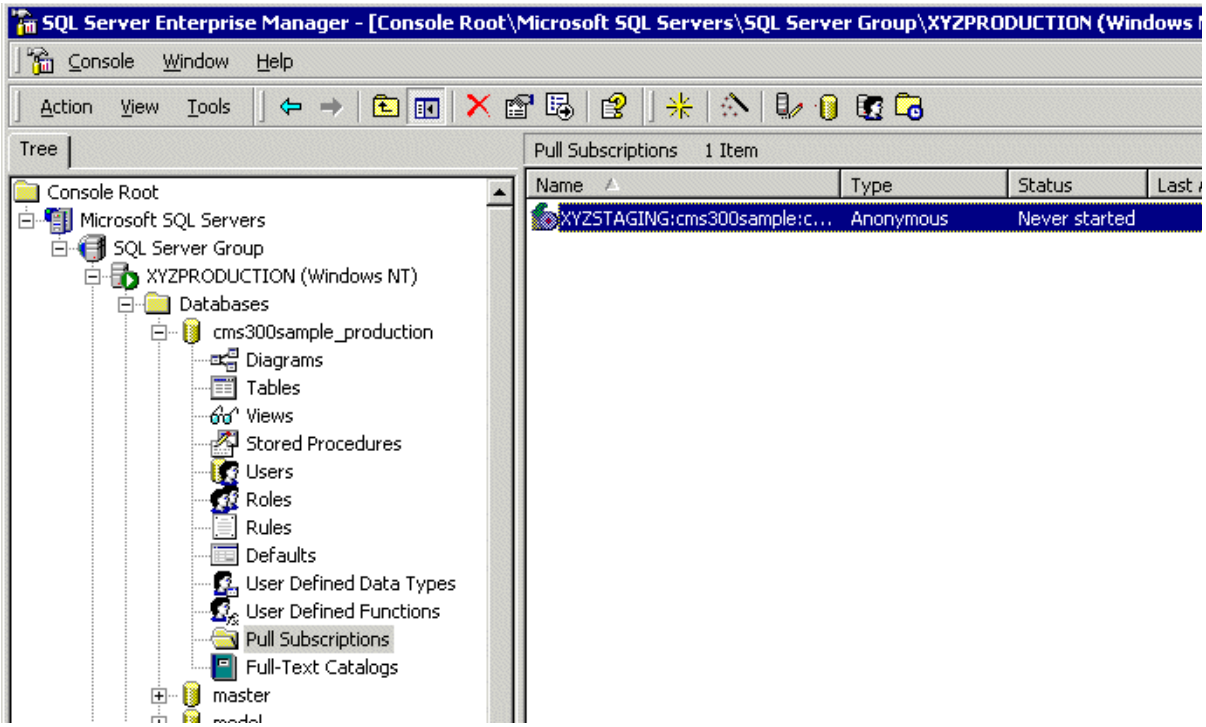
19. Specify the login used by the synchronization agent to the subscriber. Then, click **Next**.
20. The Completing the Pull Subscription Wizard appears.

21. Click **Finish** to complete the wizard.

22. A message informs you that the pull subscription was created successfully.



23. Click **Close** to close the dialog box.
24. The box closes.
25. A Pull Subscription folder appears on the database's data tree with the new pull subscription added.



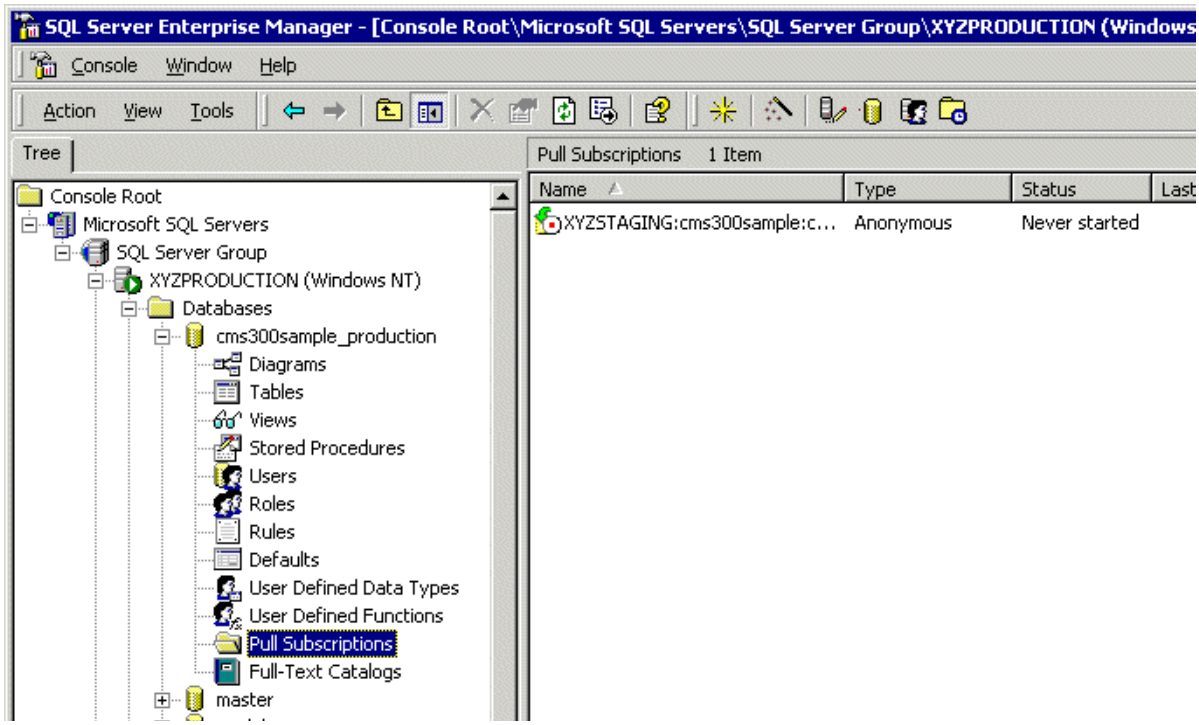
Now that the publication and subscription have been created, we can perform our initial synchronization for the databases.

Synchronizing the Databases

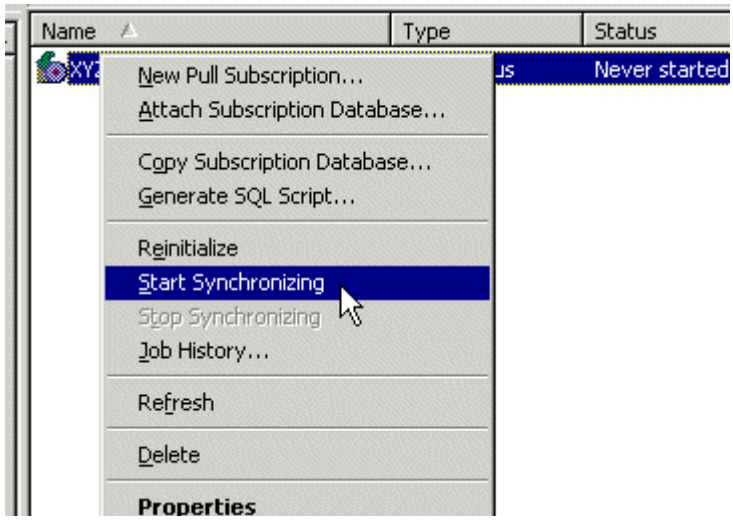
The initial synchronization moves all data from the publication database (staging server) to the subscribing database (production server).

To perform the initial synchronization, follow these steps.

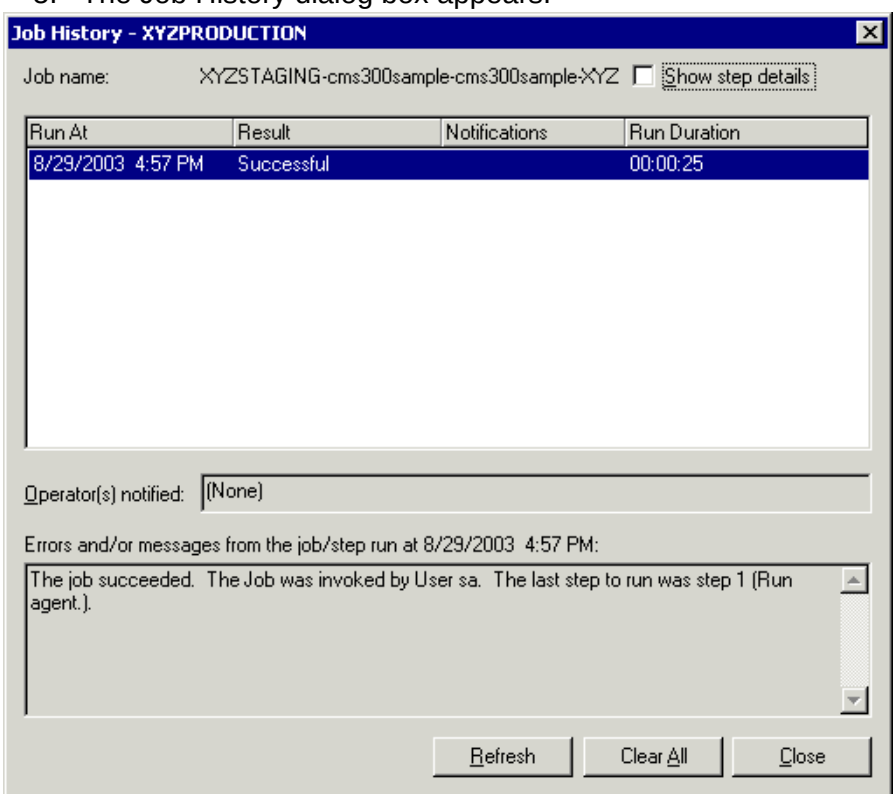
1. In SQL Enterprise manager, connect to the production server's database and locate the pull subscription that was created in "Configuring the Production Server's Database" on page 148.



2. Right click the pull subscription record and click **Start Synchronizing.**

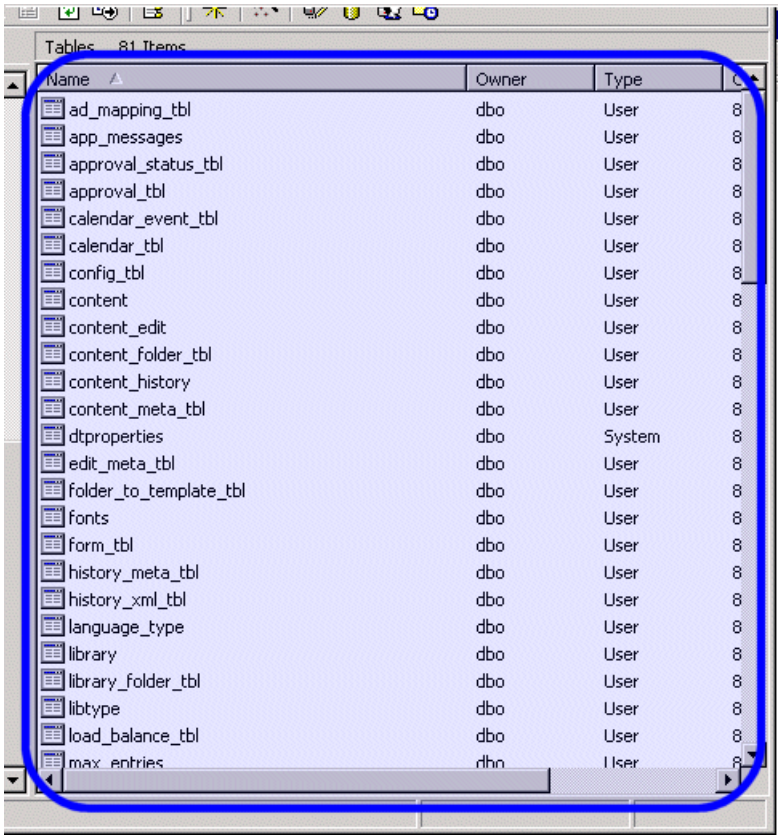


3. The synchronization is performed.
4. To view results of the initial synchronization, right click the pull subscription and click **Job History**.
5. The Job History dialog box appears.



NOTE If you receive a message other than a successful notification, re-check the settings and try again.

Also, the Ektron CMS200/300 tables from the staging server are included in the production database.



What's Next?

The deployment configuration is complete! The next section explains how to use it.

Using the Deployment Model

Now that the deployment model has been configured, you can easily make changes on your staging server and move the contents to the production server with a click of the mouse.

The following two tasks must be performed to use the deployment model.

Task...	Use...~	More Information...
Deploy Files	MS Application Center	”Deploying the Files” on page 129
Synchronize Databases	MS SQL Server	”Synchronizing the Databases” on page 157

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS200/300 in the following documents:

- *Ektron CMS200/300 Administrator Manual, Version 4.5*
- *Ektron CMS200/300 Developers Reference Manual, Version 4.5*
- *Ektron CMS200/300 User Manual, Version 4.5*
- *Ektron CMS200/300 Administrator Quick Start Manual, Version 4.5*

Support

If you are experiencing trouble with any aspect of Ektron CMS200/300, please contact the Ektron Support Team via our Web Site, or by e-mail:

support@ektron.com

http://www.ektron.com/support/index.aspx

Sales

For questions and answers about purchasing Ektron CMS200/300 from Ektron, contact the sales department by sending an e-mail to:

sales@ektron.com

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