Ektron CMS200/300 Administrator Manual

Version 4.5, Revision 4

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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.

Introduction to Ektron CMS200/ 300

Thank you for purchasing Ektron CMS200/300, the best and most affordable solution for Web content management. We welcome you to use Ektron CMS200/300 to maintain, update, and modify the contents of your Web site. All these efforts are easily achieved while preserving the look and feel that you originally designed for your site. With Ektron CMS200/300, the tasks of maintaining your site and updating content blocks are passed on to subject experts. Based on the page layouts and processes that you create, the highest level of quality is preserved and maintained throughout the life cycle of the site.

Who Should Read This Manual?

This document introduces all the concepts, features, and instructions for using Ektron CMS200/300 as a Web Administrator.

The Web Administrator is the person who is responsible for adjusting the setup of the Web site, and alters the site as institutional changes require. New areas needing to be added to the Web site, the changing of personnel and processes over time may cause these adjustments.

About this Document

This manual uses the sample ASP Web site installed with Ektron CMS200/300 to explain and demonstrate functionality in a Ektron CMS200/300 controlled Web site.

NOTE All functionality is independent of the Web Server, therefore, Ektron CMS200/300 for ColdFusion, PHP, and ASP.Net will function in the same way as the ASP version.

What's New With Ektron CMS200/300?

This manual describes all features of Ektron CMS200/300. For information about the newest features added to Ektron CMS200/300, go to http://www.ektron.com/cms200.aspx?id=1514 and http://www.ektron.com/cms300.aspx?id=1452 respectively.

Conventions

This document uses typographic styles and conventions that are explained in the table below:

Convention	Explanation
Bold	Bold type indicates a menu selection, button, or entry that the reader must select.
Courier New	Courier New font indicates text or an example of text that the reader may enter into the computer.
NOTE:	Notes indicate special conditions or important issues that the reader should be extra careful about.
Italic	Italic text indicates either a title that is being cited or a special use of a word that might be confused with common world terms.

Using Ektron CMS200/300

The Ektron CMS200/300 application provides you with a way to control the content of your Web site. The tasks of creating and maintaining your Web site are allocated among different types of users.

The two types of Ektron CMS200/300 users are:

User	Job
Administrator	Sets up the site, adds users and user groups, sets permissions, and maintains the library

User	Job
Content Contributor	Maintains Web site by adding, modifying, and publishing content blocks.

You assign privileges to Ektron CMS200/300 users based upon the tasks for which they are responsible for. Each user may be assigned any or all types of privileges. Users who do not have administrative permissions are referred to as content contributors.

This document, the Ektron CMS200/300 *Administrator Manual, Version 4.5, Revision 4,* discusses all administrator tasks. Detailed information about the editing and publishing features of Ektron CMS200/300 may be found in the Ektron CMS200/300 *User Manual, Version 4.5, Revision 4*.

Web Site Administration

Ektron CMS200/300 administrators must set up and organize the Web site before content contributors can log in.

This document describes features and tasks available to a user with administrative privileges.

Ektron CMS200/300

The Ektron CMS200/300 product implements some specialized concepts and processes that make the product as effective as possible. Understanding these concepts before you use the product will help leverage your Web site development efforts. You will encounter the concepts and terminology discussed in this chapter as you use Ektron CMS200/300.

About Ektron CMS200/300

Ektron CMS200/300 is a web content management tool that enables anyone who has web access and login permissions to contribute to maintaining a Web site. Content experts responsible for select areas of the Web site can update the site from anywhere they have web access. This "edit from anywhere" capability is very powerful because it allows subject matter experts total freedom to make changes at the spur of the moment from anywhere they can access the site.

The WYSIWYG editing tool supplied with Ektron CMS200/300 eliminates the need for authors to know HTML. Authors can edit content blocks using familiar menus and tool bar icons that are popular in most word processing applications. To further facilitate information on exchange and authoring, Ektron CMS200/300 also supports full cut and paste operations.

The Ektron CMS200/300 content manager uses database technology to store, build, and retrieve web page content blocks. The placement of the content blocks on a web page is determined by templates, which you build with tools familiar to you outside the context of Ektron CMS200/300. Templates can be thought of as mechanical layouts of your web pages. These templates incorporate powerful custom functions that Ektron CMS200/300 uses to manage your content blocks. Each block of content, or

document, is assigned a unique ID that Ektron CMS200/300 uses to retrieve the content blocks from the database.
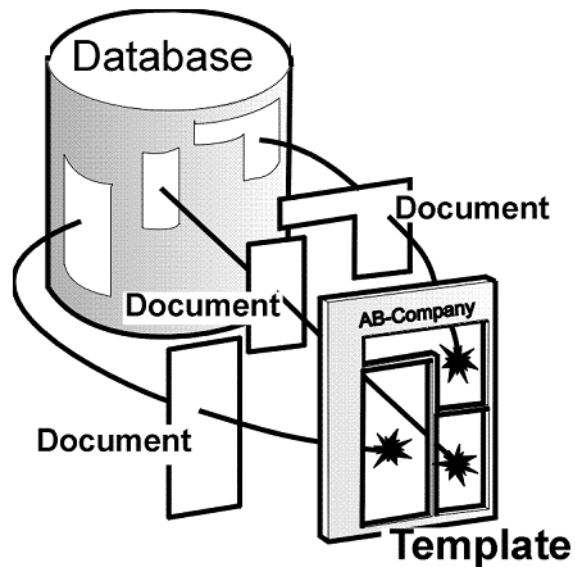
Because web pages can share the same layout, it is useful to determine which types of content blocks will use a template. Templates are stored as .asp files, and are kept outside the database. If during the evolution of your site the need for a new template arises, you simply create a new one, store it in a directory accessible to Ektron CMS200/300, and create a new content block that will use the new template. You can even modify the layout of an existing template, reincorporate it, and the content blocks will automatically flow into and adjust to the new layout.

Workflows

This section offers suggested workflow processes that can be used when approaching or starting an Ektron CMS200/300 project. The sub-sections that follow break the efforts into tasks that are typically performed by people with different levels of responsibility. In some cases one or more people may perform these tasks. The cases and levels of responsibility can vary from organization to organization.

Site Manager (Webmaster) Workflow

The flow described below assumes that you have already set up your server machine, platform, and firewall, selected your ISP, loaded all scripting software, and installed the Ektron CMS200/300 software.

The following list is a suggested approach to setting up the initial state of a Web site that will use Ektron CMS200/300 to manage it as it evolves.

1. Design the site: identify Content Folders, content of pages, flow of information, link structure.
2. Layout and design your template with tables, graphics, hyperlinks, etc. using popular web design tools, for example, Dreamweaver, FrontPage, etc.
3. Identify placement of content blocks, or content blocks, in the templates and add ID tags to each document in the template.
4. Create a style sheet for your Web site or Identify and add fonts to the site to make them accessible to the Site Maintainers.
5. Add content where necessary. Some content blocks can start out empty but it would be helpful to authors if you put some content that explains what should be filled in at each location.
6. Upload all graphics that the site will initially need using the Library Manager.
7. Create User groups and establish approval process.

8. Setup initial login permission that will let at least one site administrator access the site.

9. Notify personnel responsible for site administering that the site is ready for them.

Administrator Workflow

The following list is a suggested flow that a site administrator might take to prepare the site to go live and enable Ektron CMS200/300 access for Site Maintainers. This access will determine permissions and set revision control processes.

1. Login to Ektron CMS200/300.

2. Access your Workarea by clicking on a Workarea icon.

3. Select **Administrate > Configuration > Setup** in the workarea and make any necessary changes.

4. Under the Content category, identify and load in templates.

5. Under the User category, set up User Groups and Users.

6. Under the Content category assign permissions to Content Folders and establish the approval process.

Site Maintainer Workflow

Site Maintainers are responsible for keeping the site accurate and up to date. These people primarily interface with the Work Area and the Content Editor.

1. Log into Ektron CMS200/300 and check your work area for content blocks that need your attention (for example, submitted content).

2. After logging in, go to the web page(s) that contains the content block(s) that you want to change.

3. Click on the edit icon at the top of the content block.

4. Make your changes.

5. Save your changes using a button that relates to your intent. For example, if you want to continue to work with the content blocks while not giving up the locked out status use the Save Button.

6. Preview the changes that you made, using the Preview option supplied by Ektron CMS200/300.

7. Go back and make any changes if necessary

Getting Started

Now that you have installed Ektron CMS200/300, what's next? There are several resources supplied by Ektron that can help you get your own Ektron CMS200/300 Web site up and running.

This chapter explains these resources that you have access to.

Menu.asp

When installed, Ektron CMS200/300 creates an HTML Web page named "Menu.asp" that serves as a site map to your Ektron CMS200/300 product.

Displayed here is the Ektron CMS200/300 Menu:
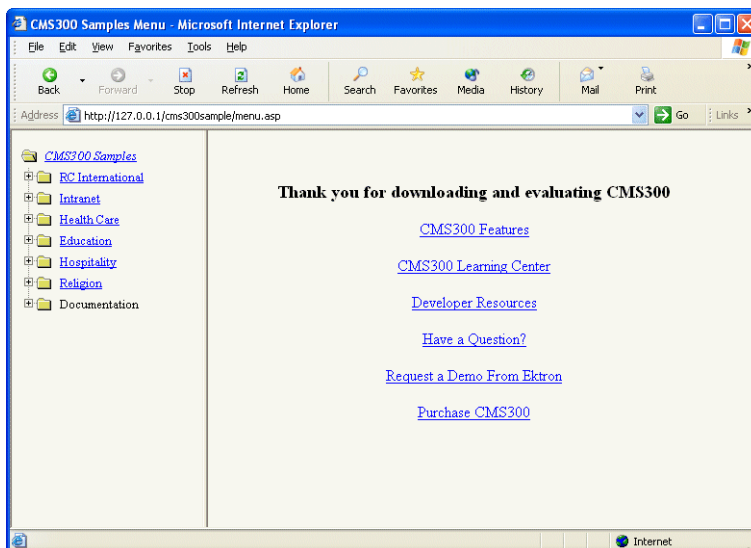
This Web page is installed to the Ektron CMS200/300 root directory on your Web server. The menu provides helpful links as well as links to the Ektron CMS200/300 sample Web sites.

By default, here is the path to this Web page:

http://[YourWebServer]/cms300sample/menu.asp

Where [YourWebServer] is the URL to the Web server where Ektron CMS200/300 is installed to.

The Sample Web Site(s)

Note   This feature is only available with Ektron CMS300. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

The default Ektron CMS200/300 installation provides you with several small sample Web sites that allow you to become familiar with the Ektron CMS200/300 product.

These sample Web sites contains Web pages rich with text and images. The database contains users, user groups, and content that we have already defined for you to illustrate the various features and concepts of Ektron CMS200/300.

There are five sample Web sites that can be installed during the installation process. Each sample Web site has a different theme. Explained here are the names and themes of each Web site.

Name	Theme	URL
RC International	Developer oriented	/CMS200Sample/index.asp /CMS300Sample/index.asp
Intranet	Company intranet	/CMS300/intranet/index.asp
Ektron University	University/educational	/CMS300Sample/EktronUniversity/index.asp
Ektron Inn	Hospitality	/CMS300Sample/EktronInn/index.asp
Century Medical Services	Medial	/CMS300Sample/CenturyMedicalServices/index.asp

This sample Web sites will give you an overview of a working Ektron CMS200/300 Web site so that you can familiarize yourself with Ektron CMS200/300's features before you create your own site.

Logging Into an Ektron CMS200/300 Web Site

Before you can begin managing Web site content and your Web site, you must first log into your Web site.

This section explains how to log into your Web site.

Before You Can Log In...

Before you can log into your Ektron CMS200/300 Web site, there is some information that you must first acquire.

Listed here is the information that you need:

- URL to your Web site's Ektron CMS200/300 login page.
- Username and password to log in

If you do not already have this information, contact your Web site developer or the person who installed Ektron CMS200/300.

Once you have this information, you are ready to log in, configure, and manage your Ektron CMS200/300 Web site.

Logging Into Your Ektron CMS200/300 Web Site

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

1. Begin by browsing to your Web site's Ektron CMS200/300 login page (see "Before You Can Log In..." on page 11 for additional information).

2. Locate and click on the Ektron CMS200/300 login button

   (&Login) on the Web page.

   The "Ektron CMS200/300 Login" dialog box is displayed.

3. Enter your username and password into the displayed fields.

   The default admin username and password is **admin/admin**.

NOTE   If your system is using Active Directory Integration, then you must also specify your Domain. See also "Logging into a System that Uses AD Integration" on page 519.

4. Click on the **Login** button in the dialog box.

   The Web page is now displayed with colored boxes around the content blocks managed by Ektron CMS200/300.

Once you are logged in, you can manage content right from the Web pages, or you can access your Workarea which is the centralized location of all your tasks.

The Icon Menu

The Icon menu is displayed at the top left corner of every Ektron CMS200/300 content block. You will be able to perform many tasks and display important information my using the icon menu. These buttons will change depending on the status of the Content block

or your permissions for the content block. These buttons and tasks will be described in the following sections.

The following table has a list of each of the buttons and a description of what it is used for. Not all buttons are available in Ektron CMS200.

Icon	Name	Description	More Information
	Add Calendar Event	Allows you to add a calendar event to an Ektron CMS200/300 event calendar.	
	Add Content	Allows you to add a new content block to a content folder, collection, calendar event or list summary.	
	Approve	Clicking this button will open the approve area where you can approve or decline the request for the content block to be published or deleted.	"Approve ()" on page 17

Icon	Name	Description	More Information
	Assign Task	Allows you to assign a task to an Ektron CMS200/300 user. Note: This feature is only supported in Ektron CMS300.	"Managing Tasks" on page 250
	Delete	Allows you to submit a request to delete the current content block.	"Delete ()" on page 18
	Edit	Checks out the current content block to be edited by you.	"Edit ()" on page 16
	Logout	Click on this icon to logout of the Ektron CMS200/300 view of the Web site.	"Logout ()" on page 20
	Preview	Allows you to preview the content block before it is published to the Web site.	"Preview ()" on page 19
	Properties	Opens the content block's properties page where you can view important information about the current content block.	"Status" on page 15
	View Calendar Events	Views all calendar events for a selected date.	"Viewing Calendar Events" on page 377
	View Content Difference	Opens eWebDiff tool in a new window and displays the differences between a historical version and the published version of a content block.	"View Content Difference ()" on page 16
	View History	Opens the View History area where you can view the historical version of the current content block.	"View History ()" on page 18
	Workarea	Opens the workarea where you can perform all your Ektron CMS200/300 tasks from.	"Workarea ()" on page 19

Shown below is a table describing each border color and what it means:

Color	Meaning	Description
Green	Active	Content is Active on the Web site and ready to be edited
Red	Checked Out	Another user is currently editing the content
Yellow	Approval Process	Content has been submitted, and is in the approval chain.
Grey	Pending Go Live	Content has been approved, but the go live date hasn't occurred yet.

Status

Other than noticing the change in the border, you can see a more detailed status of a content block in Ektron CMS200/300. By hovering your mouse over the properties icon, you will see the title of the content block, as well as its current status. Shown here is an example of viewing the status of a content block by using this method.
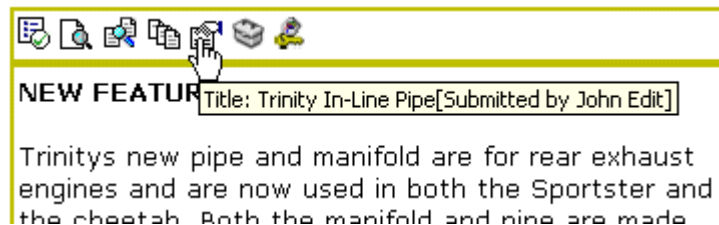
Listed below are the different statuses in the application.

- Checked out by user
- Checked in by user
- Content submitted by user
- Content checked out by user
- Delete request by user
- Pending the Go Live Date

Edit ( )

Content in a Ektron CMS200/300 Web site can be in one of many different states.

A green border around a content block indicates that you can check out that content for editing. A yellow or red border surrounding a content block signals that the content cannot be edited by you at present.

NOTE Once you check out a content block, it cannot be checked out or edited by other users, unless you check-in the content block.

To edit a content block, perform the following steps:

1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Browse for the content block, with a green border, you wish to edit.

3. Click on the **Edit** button( ) from the icon menu toolbar.

   The "Edit Content" page is displayed.

4. From the edit content window, you will be able to:

   – Edit Content

   – Save the changes

   – Check-in the Content

   – Edit a summary

   – Specify metadata for the content

   – Submit the content for approval

   – Publish a content block to the Web site

   – Access the Ektron CMS200/300 Library.

View Content Difference ( )

The compare icon appears on the icon toolbar when the content block is in a state other than published. Using Ektron CMS200/300's content comparison utility, eWebDiff, you can visually see the changes that have been made to the selected content block.

To compare the currently published version of a content block with the currently staged version, perform the following steps:

1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Browse through your Web site content until you find a content block that has a staged version to be compared with.

3. Click on the **View Differences** button(🔲) from the icon menu toolbar.

   eWebDiff opens in a new window.

Approve (🔲)

When you are logged into Ektron CMS200/300 as a user who is part of an approval chain, you may come across a content block with a yellow border. The yellow border signifies that the content is in the approval chain. If you are the next approver that needs to approve the content block, there an Approve icon is displayed in the icon menu.

To approve a submitted content block, perform the following steps:

1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Browse through your Web site content until you find the content block that is submitted and awaiting your approval.

3. Click on **Approve** button(🔲) from the icon menu toolbar.

   The "Approve Content" page is displayed.

4. Perform one of the following steps to close the window:

   – **Approve** (🔲) the content and submit it to the next approver or if you are the last approver, the content will be published to the site.

   – **Decline** (🔲) the content, which will cause the content block to be checked in, and available for editing by all users with permissions.

– Click **(✕)** at the top corner of the window to close without doing anything.

Delete (🗑)

The Delete command allows the users to remove content blocks from the Ektron CMS200/300 Web site. Just like in publishing a content block, a content block requested to be deleted will need to go through its respective approval process before it will be removed permanently from Ektron CMS200/300.

To delete a content block, perform the following steps:

1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Browse through your Web site content until you find the content block you wish to delete.

3. Click on the **Delete** button(🗑) from the icon menu toolbar.

NOTE If you don't see the Delete icon in the icon menu, then you don't have permissions to delete the content.

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4. The "View Content" page is displayed.

5. Click on the **Delete** button(🗑) from the View Content workarea toolbar.

The selected content block is now in the approval chain with a status of "Marked for Deletion."

NOTE If you are the last approver in the approval chain, then the content block will immediately be deleted without being approved.

After the content block goes through the approval chain, it is permanently deleted from the Ektron CMS200/300 Web site.

View History (📋)

Each time a content block is checked in or published, a "snapshot" is made of that content and stored in the Ektron CMS200/300 content history table. Once stored, you can access and view historical versions of each content block.

To view the history for a content block, perform the following steps:

1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Browse through your Ektron CMS200/300 Web site until you find the content block you wish to view the history of.

3. Click on the **View History** button( ) from the icon menu toolbar.

   The "Content History" window is displayed.

NOTE   See"Content History" on page 244 for more information about viewing, comparing, and restoring historical versions.

Preview ( )

When a content block is in a state other than "Published," the preview icon allows you to preview the currently staged version of a content block. Previewing a content block allows you to obtain a visual idea of how your content changes will appear on the Web site.

To preview a staged content block, perform the following steps:

1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Browse through your Ektron CMS200/300 Web site until you find the content block you wish to preview.

NOTE   Content blocks with staged content can either have a green or yellow border. Look for the preview icon which indicates that the content has a staged version.

3. Click on the **Preview** button( ) from the icon menu toolbar.

   A new browser window opens with the staged version of the content block viewable in the template.

Workarea ( )

The Workarea is the centralized location of all Ektron CMS200/300 tasks that you can perform. As an administrator, you have access to many more tasks than a standard user.

To access your workarea, perform the following steps:

1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Navigate to any page that has an Ektron CMS200/300 content block displayed on it.

3. Click on the Workarea button(🍩) from the icon menu toolbar.

    The Workarea opens in a new window.

NOTE For more information about the Administrator Workarea, see "Administrator Workarea" on page 38.
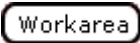
Logout (🧑)

This tasks allows you the convenience of logging out of Ektron CMS200/300 from the Menu.

Accessing the Administrator Work Area

Once logged into Ektron CMS200/300 as an administrator, you will have the option of going to the Administrator Workarea. From there, you will be able to configure and view every setting of Ektron CMS200/300.

To access the Administrator Workarea, perform the following steps:

1. Begin by logging into your Ektron CMS200/300 Web site as described in "Logging Into an Ektron CMS200/300 Web Site" on page 11.

2. Click on **Workarea** button(Workarea) on login.asp page or a

   Workarea Icon ( ) from the icon menu toolbar of a content block.

   The "Administrator Workarea" is displayed with a Windows Explorer-like interface.
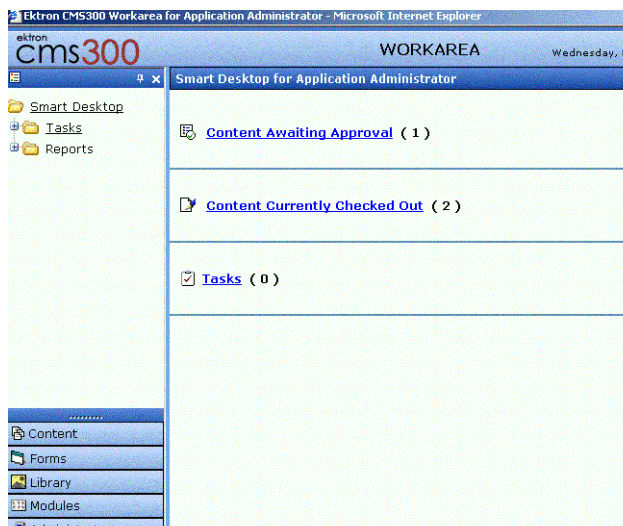
When you first access your workarea, your "Smart Desktop" is displayed. The smart desktop contains useful information that pertains to you.

From the Administrator Workarea, you will be able to access every aspect of Ektron CMS200/300. For starters, you should first access the setup page where you can configure the Ektron CMS200/300 application. This will need to be completed before any user can access your Ektron CMS200/300 Web site.

Configuring Ektron CMS200/300

In the setup section of the configuration folder, you can update information for the Ektron CMS200/300 Web site including:

- License keys
- The default language

- Maximum content and summary sizes
- E-Mail notification
- Physical Library Folders on File Server
- Builtin User Information
- Editor Options

Viewing Your Application Setup Information

To view your Ektron CMS200/300 setup information, perform the following steps:

1. Begin by accessing your Administrator Workarea.
2. The workarea is divided into 2 frames -left and main frame.

3. Navigate to the **Settings** folder button in the left frame of the workarea navigation section.
4. Expand the folder tree, and click on **Configurations** folder.
5. The Configurations folder consists of sub-folders.
6. Click on the **Setup** folder.

   The "Application Setup" page is displayed.

Updating Your Setup Information

To update your setup information, perform the following steps:

1. Access the "Application Setup" page as described in "Viewing Your Application Setup Information" on page 22.
2. Click on the **Edit** button( ) on the toolbar.
3. The "Application Setup" page is displayed.
4. Make changes to the necessary fields. The following table can be used to assist you with updating your setup page.

Field	Description
License Key(s)	Enter the license key sent to you from Ektron via email into this field.

Field	Description
Module Licenses	Enter the license key for an Ektron module that was sent to you via E-mail. See "Enabling WebImageFX" on page 23 for more information.
Default Application Language	Select the language you wish to use for Ektron CMS200/300.
Maximum Content Size	Limit the size of each content block by specifying a maximum size.
Maximum Summary Size	Limit the size of each summary by specifying a maximum size.
System E-Mail Address	Enter a valid email address into this field. This will be the address in the "From" field in the notification emails.
Enable Application Mail Messages	Check the box to enable all email notification. Un-checking this box will disable the email notification regardless of whether the users have their email enabled.
Enable CMS to create file system folders for library assets	Check the box if you would like to create physical folders on your file system machine which is identical to the Ektron CMS200/300 library folder tree.
Built In User Information	Edit the username and/or password for the built in user. By default, the username and password combination is **builtin/builtin**. *See Also:* **"BuiltIn User" on page 25**
Editor Options	Toggle between displaying or not displaying font related buttons in the editor page. Also choose to remove styles and preserve MS Word styles and classes.
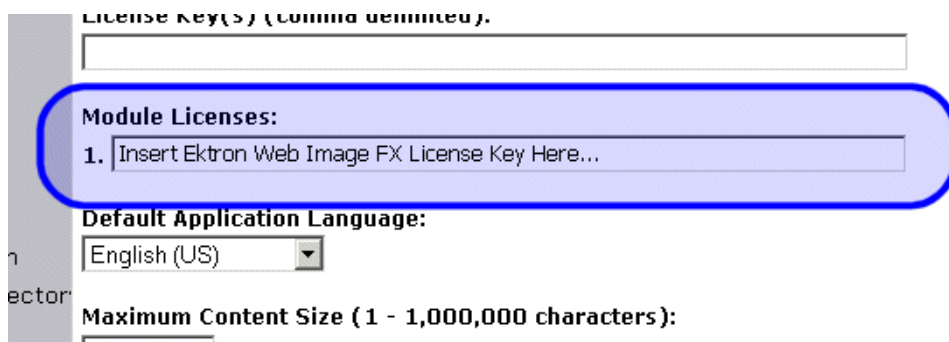
5. Make the necessary changes.

6. Click on the **Update** button(![save icon]) from the toolbar to save your changes.

    The changes are saved and the "Application Setup" page is displayed.

Enabling WebImageFX

When purchasing Ektron CMS200/300, you had the option to purchase Ektron WebImageFX as well. WebImageFX is an imaging application that allows users to edit images directly online.

If you purchased WebImageFX at the time you purchased Ektron CMS200/300, you should have received an E-mail with a license key for WebImageFX as well.

To enable WebImageFX within the Ektron CMS200/300 application, simply insert the WebImageFX license key in the "License Modules" field while editing the application setup page.

Enabling CMS to Create File System Folders

When this option is enabled, each time a new content/library folder is created in Ektron CMS200/300, a physical folder is created on the file system as well. This assists you with further organizing your library assets on your file server.

Displayed in the following table is a comparison of the Ektron CMS200/300 library folder tree compared to the file system's folder structure.

Ektron CMS Folder Tree	File Server Folder Tree

BuiltIn User

The "builtin user" is a user that is defined in the setup page of Ektron CMS200/300. This user is essentially an administrator of your Web site. The builtin user's primary function is to be an

"emergency user" in the event that you are unable to login to your Ektron CMS200/300 Web site as the normal administrator.

The builtin user has all the benefits of a user in the administrator group. However, the user is not registered in the users folder, therefore, the user is unable to be part of an approval chain. With that one exception, you may use the builtin user to perform administrative tasks if needed.

By default, the username and password combination for the builtin user is builtin/builtin. For security reasons, Ektron recommends that you change the username and password upon installation of Ektron CMS200/300.

Editing the BuiltIn User

To edit the builtin user's information, perform the following steps:

1. Begin by accessing the "Edit Application Setup Information" page as described in "Updating Your Setup Information" on page 22.

2. Locate the section on the page that is titled "Built In User"

3. Edit the built in user information by making changes to the username and password.

4. Make any additional changes to the application setup information page as needed.

5. Click on the **Update** button(🖫) from the toolbar to save your changes.

   The page is refreshed, and the "Application Setup" page is displayed with the changes reflected.

Editor Options

With the demand of style sheet use over standard font related tags, Ektron CMS200/300 allows you to choose between the two. To minimize the size of content blocks, style sheets reduce the amount of font tags that are stored with the content block.The

editor options section allows to specify how you want the editor to handle this issue.

Explained in the following table are the editor options that you may set in Ektron CMS200/300.

Editor Option	Description
Enable Font Buttons	Enabling font buttons will display the following font related buttons on the toolbar in the editor page: • Font Face • Font Size • Font Color • Font Background Color *See Also:* "Enable Font Buttons" on page 28
Disable Font Buttons	Disabling font buttons from the editor toolbar will remove the buttons specified above. To enable users to apply font related attributes to text, you will need to set up a style sheet for the content folder the content block belongs to. *See Also:* "Disable Font Buttons" on page 28
Remove Styles	If the editor is set to remove styles, all inline style added to the content will be stripped out when the HTML is cleaned.
Do not Remove Styles	If the editor is set to do not remove styles, all inline style added to the content will be preserved even when the HTML is cleaned.
Preserve MS-Word Styles	When content from MS Word is cut and pasted into the editor, the editor, by default, will clean and remove some of the MS-Word styles. Preserving MS Word styles will cause the editor not to clean and remove them.
Preserve MS-Word Classes	Similar to styles, when content from MS-Word is cut and pasted into the editor, the editor, by default, will clean and remove some of the MS-Word classes. Preserving MS-Word classes will cause the editor not to clean and remove them.

Enable Font Buttons

Displayed below is the editor set to enable font related buttons.
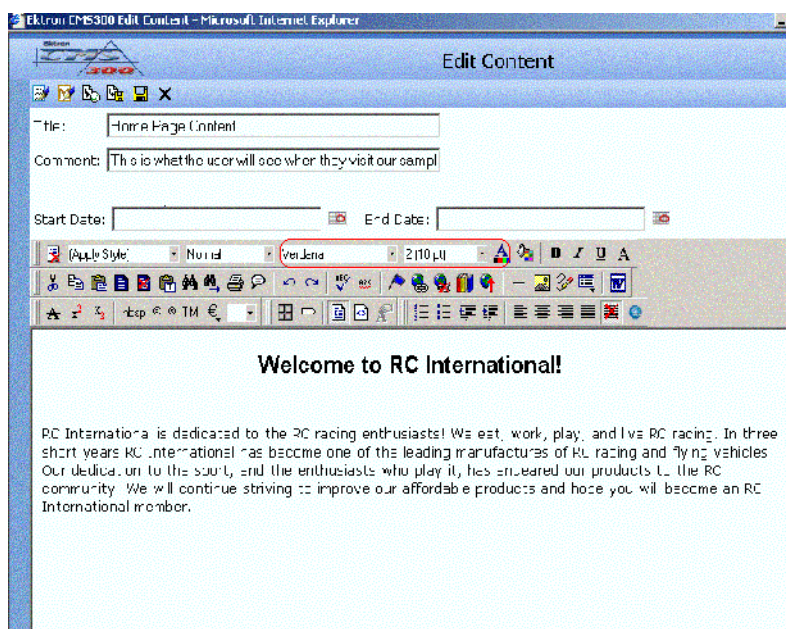
Disable Font Buttons

Displayed here is the editor with the font buttons disabled.

To Close the Administrator Work Area

To close the Administrator Workarea, click on the(❌) button in the upper right hand corner of the window.

When you close the Administrator Work Area, you return to the Ektron CMS200/300 view of your Web site, but do not exit the Ektron CMS200/300 application.

Site Preview

While logged into your Ektron CMS200/300, there is the option to preview the Web site as it would appear to visitors, or preview the Web site in Ektron CMS200/300 view.

Button	Name	Description
✓Preview	Preview On	Turns the preview mode on. In preview mode, all content blocks that are currently staged will be previewed as if they were published.
✗Preview	Preview Off	Turns preview mode off. Preview mode is turned off when colored borders surround the content blocks allowing you to perform workflow tasks.

When using the site preview mode, you will see the Web site as visitors would. The content blocks that are displayed in the site preview mode are always the last edited versions, as opposed to the normal view where only the most current published versions of the content blocks are displayed.

Toggling Site Preview
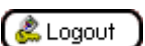
To toggle site preview on and off:

1. Navigate through your Web site until you find your login page.
   The logout, workarea, and preview buttons are displayed.

2. Click on the **Preview On** (✓Preview) button.
   The page is refreshed, and the Web site is in preview mode.

3. To turn the preview mode off, click **Preview Off** ( ). button on the login page.

Logging Out of the Sample Site

To Logout of Ektron CMS200/300:

1. Click on a **Logout Icon** ( ) from the icon menu toolbar of a content block or click on the **Logout** button( ) on login.asp page.

   The Logout confirmation box appears

2. Click on the **Logout** button.

   The logout window closes, the page is refreshed, and you are now logged out of your Ektron CMS200/300 Web site.

After logging out, you will return to your Web site to the page where you logged out, however, it will be shown in standard view, not the Ektron CMS200/300 view.

Work Area Navigation

The **Ektron CMS200/300** administrator Workarea is divided into two frames:

- the left frame displays the *Workarea Navigation System*

- the right frame displays the information about the navigation control
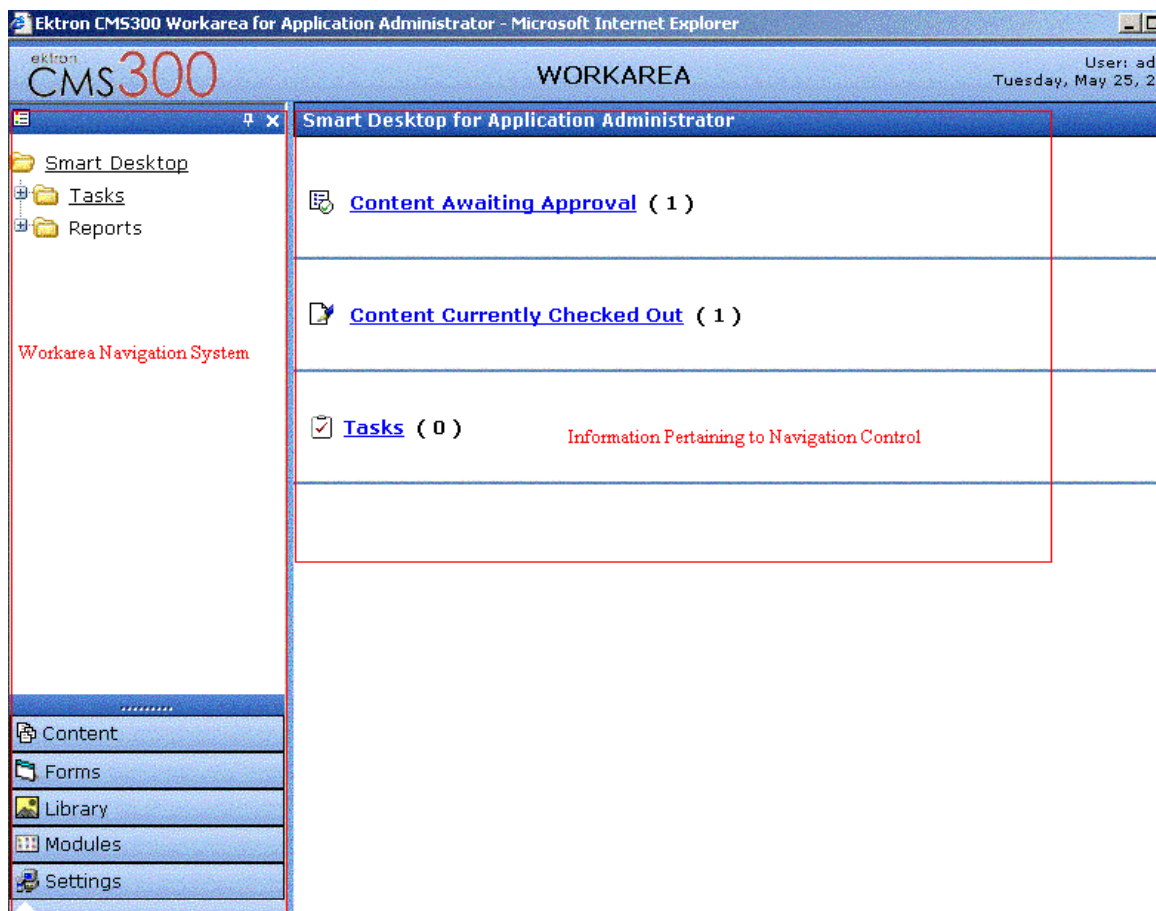
NOTE: Some Workarea Navigation features displayed in the above image are only supported in Ektron CMS300.

Workarea Navigation

The left frame of the workarea has three sections.
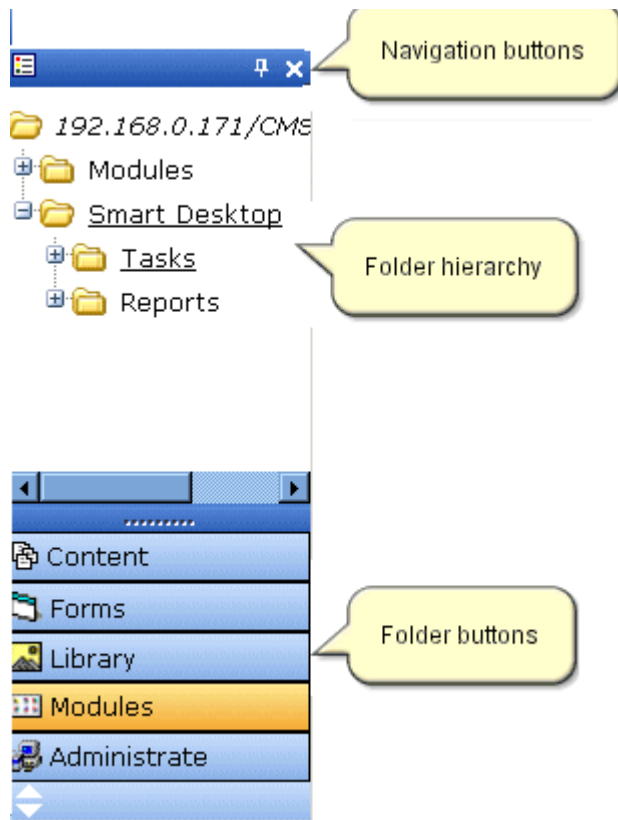
Navigation Buttons

The top left of the Workarea contains the navigation buttons.

Each button is explained in the table below.

Button	Name	Description
📇	Smart Desktop	Displays the Smart Desktop for the application administrator. Click this button to move directly to the Smart Desktop from any location. You can also use this button as a short cut to display the Smart Desktop.
📌	Auto Hide	Toggles enable/disable auto-hide feature of the Workarea.
✕	Hide Navigation Button	Immediately hides the left frame of the WorkArea window. To redisplay the left frame, hover the cursor over the vertical area located along the left side of the workarea. Note: This is not a close button. Clicking on it does not close the workarea window.

Folder Hierarchy

The *Folder Hierarchy* displays the folder trees within **Ektron CMS200/300**.

The folder hierarchy changes when you click a folder button or icon. *See Also:* "Folder Buttons and Icons" on page 34.

Folder Buttons and Icons

The workarea lets you access top level folders in the form of buttons or icons. You can choose the display format. A folder can be represented as either a button or an icon-- it cannot appear in both forms.

Folder *buttons* make it easier to identify the folder by providing a larger display, which includes the folder name and an icon.

Folder *icons* are not as easy to recognize at first but leave more space for displaying the folder tree.

Folder Buttons

The lower left section of the Workarea has folder buttons, which represent the top level folder structure of **Ektron CMS200/300**.
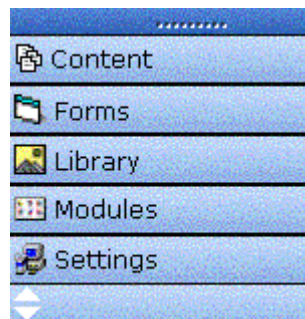
When you click any button, the associated folder tree appears in the left frame, and its content blocks appear in the right frame.

For example, click the Content button to display the content folder tree in the left frame, and a list of its content blocks in the right.
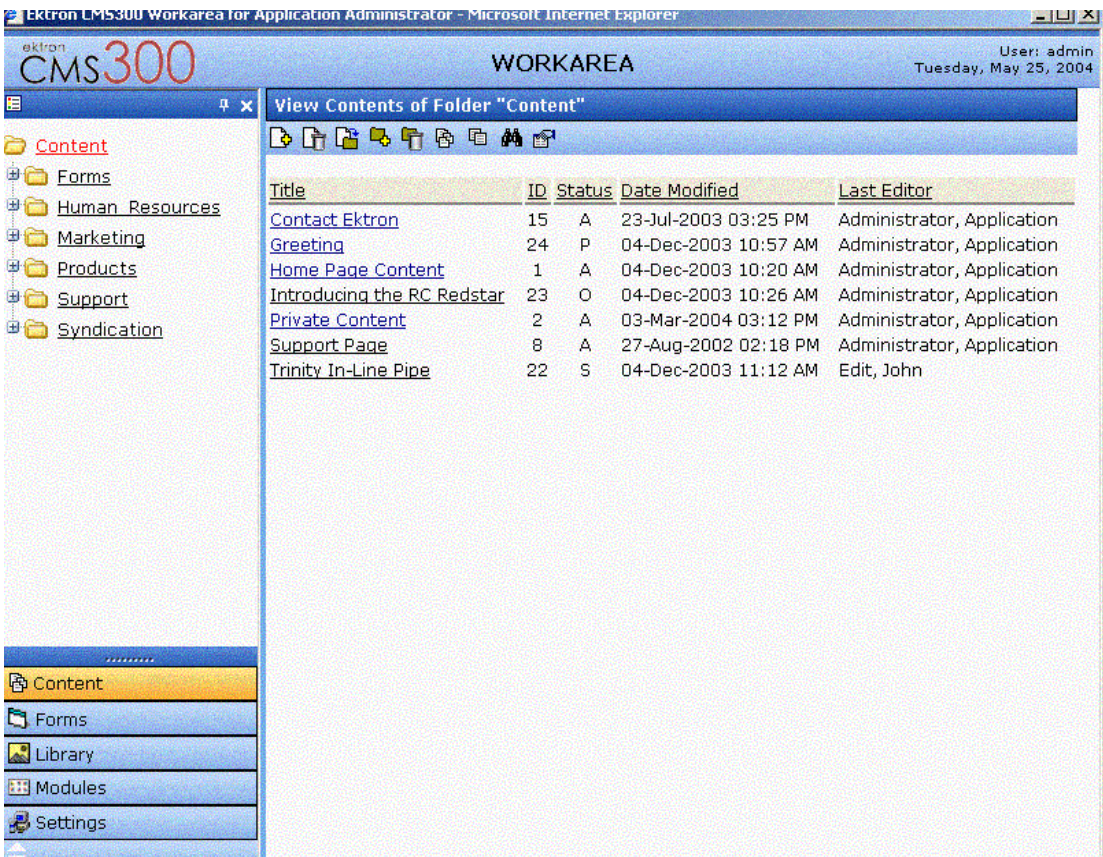
Folder Icon Bar

The bottom bar of the left frame displays folders represented as icons. Clicking an icon is the same as clicking a folder.

Icons only appear if they are not displayed as buttons. For example, if you have Folder Buttons displayed for Content, Forms, Library, or Modules folder, these icons do not appear on the bar.

However, since there is no folder button for **Settings** Folder, it appears on the folder icon bar.
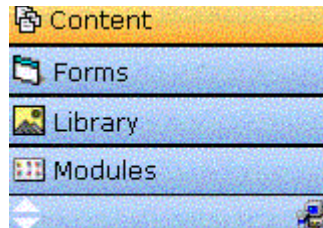
Switching Between Folder Buttons and Folder Icons

To switch a folder button to an icon, click the Up and Down arrow key, located at the left of the folder icon bar, as shown below.
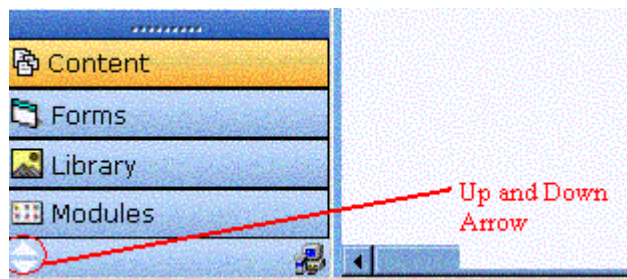
The arrow lets you choose the number of buttons displayed. The up arrow displays more buttons, while the down arrow displays fewer.

Double click either arrow to fully expand or collapse the button area.

You may also adjust the number of buttons displayed by dragging the resize bar, located above the content button.

Workarea Toolbar Buttons

Throughout the workarea, there is a toolbar at the top of the page that contains buttons for performing specific actions. Becoming familiar with the buttons and the functions they perform will help you become more proficient with Ektron CMS200/300.

This section will explain all the buttons that you will see in the workarea, as well as the functions they perform.

NOTE	Not all buttons are available in Ektron CMS200.

Button	Name	Description	More Information
	Active Directory Refresh	Updates user and group information from the Active Directory to Ektron CMS200/300.	"After Integration is Enabled" on page 522
	Active Directory Replace	Replaces Active Directory users and user groups.	"Replacing a User" on page 523, "Replacing a User Group" on page 529
	Add	This is a generic add button that is used in several areas to add items.	
	Add Calendar	Accesses the add calendar page.	"Adding a New Calendar Module" on page 194
	Add Calendar Event	Accesses the add calendar event page in the workarea.	"Adding Basic Calendar Events" on page 208

Button	Name	Description	More Information
	Add Content Block	In a content folder, this button will open the editor and allow you to create a new content block.	• "Adding HTML Content" on page 57 • "Adding XML Content" on page 60
	Add Content Folder	In a content folder, this button will allow you to create a sub-folder to further organize your content blocks.	"Adding Sub-Folders" on page 53
	Add Font	In the font folder, this will allow you to add a font to your Web site for content contributors to use when working with content.	"Adding Fonts" on page 177
	Add Form	Accesses the add form page.	"Adding a New Form" on page 248
	Add Library Item	In the library folder, this button will allow you to upload an image or file, or add a hyperlink or quicklink to use in content.	"Managing Images, Files, Hyperlinks, & Quicklinks" on page 157
	Add Membership Group	Create a new membership user group. Note: This feature is only supported in Ektron CMS300.	"Private Content & Memberships" on page 380
	Add Membership User	Create a new membership user. Note: This feature is only supported in Ektron CMS300.	"Private Content & Memberships" on page 380
	Add Metadata Definition	In the Metadata area of the workarea, this button will allow you to add another metadata definition to your application.	"Adding a Metadata Definition" on page 495

Button	Name	Description	More Information
	Add Task	Assign a task to an Ektron CMS200/300 User. Note: This feature is only supported in Ektron CMS300.	"Managing Tasks" on page 250
	Add User	In the user folder, this button is used to add more CMS users to your Web site.	"Creating A New User" on page 166
	Add User Group	In the user group folder, this button will allow you to create a new CMS user group.	"Creating A New User Group" on page 168
	Add XML Configuration	This button allows you to add a new XML configuration for your Web site.	"Adding a New XML Configuration" on page 98
	Approvals	In the content folder, this button is used to view the approval chain for content in a content folder or for a specific content block.	"Setting Approval Chains" on page 90
	Approve	This button will approve the content that is awaiting your approval.	"Approve ()" on page 17
	Approve All	In the approvals folder, this button will allow you to approve all content, that is awaiting your approval, with one click.	"Approving Multiple Content Blocks" on page 263
	Back	Clicking this button will take you back to the previous page.	
	Calendar	In the editor page, this button will open a calendar for you to choose the date and time that would like your content to go live.	"Scheduling Content" on page 486
	Cancel	Clicking this button will cancel the action that you are performing without saving the information.	

Button	Name	Description	More Information
	Check-in	This will allow you to save and check in the content block that you have been working on.	
	Check-out	This will allow you to check out a content block to edit without others working on it simultaneously.	
	Collection	Enables you to access the collection area for a content block and create, edit, and delete collections.	"Collections" on page 277
	Decline	This button will decline an approval request that has been submitted to you.	"Approving/Declining Content Blocks" on page 245
	Delete	When applicable, this button will delete the corresponding item.	
	Delete Content	Allows you to delete multiple content blocks at once.	"Deleting Content" on page 73
	Delete Folder	Clicking this button will delete the current content folder you are in.	"Deleting Folders" on page 53
	Delete Form	Used to delete a form no longer needed in the Web site	"Deleting a Form" on page 268
	Do Not Apply XSLT	Removes XSLT applied to XML content viewed in the content history area.	
	Edit	Used several times, this button is used to edit content or specific criteria in the workarea.	"Editing HTML Content" on page 70
	Edit Data Design	Opens the XML configuration's data design editor allowing you to create and set up your data design.	"Editing Data Design Packages" on page 112

Button	Name	Description	More Information
	Edit Form	Accesses the edit form page to make changes to an existing form.	"Editing a Form" on page 265
	Edit Full Text Search Settings	Accesses Full Text Index Search configuration for an XML configuration.	
	Edit Metadata	Clicking this button will allow you to edit the existing metadata for a content block.	"Metadata" on page 494
	Edit Summary	This will allow you to edit the existing summary for a content block.	"Summaries" on page 491
	Export Form Report	Exports form data.	"Exporting Form Reports" on page 261
	Insert Library Item	From the library, this button will insert the selected library item into your content block.	"Managing Library Assets" on page 145
	Link Check	Searches Web site content to locate where the content or asset is linked from.	"Link Checking" on page 77
	Load Balance	Used in the library to specify folders outside the Ektron CMS200/300 Web site where images and files will also be added.	"Load Balancing" on page 153
	Move Content	Enables you to move content block(s) to another content folder.	"Moving Content" on page 71
	Overwrite	Allows the user to overwrite an existing image or file with a newer version.	"Overwriting Images and Files" on page 160
	Permissions	This button will allow you to set the permissions for a content folder or content block.	"Permissions & Approvals" on page 81

Button	Name	Description	More Information
	Preview	In the library, this button is used to preview the item that has been added, or will be added.	"Viewing Library Assets" on page 159
	Properties	This button will display the properties for the corresponding content folder, as well as let you edit them.	"Folder Properties" on page 47
	Publish	This button will allow you to save and publish the content block to your Web site.	
	Purge History	Accesses the purge history screen.	"Purge History" on page 50
	Remove	This button is a standard remove button used to remove items from folders and lists in the Workarea.	
	Reorder	Used to reorder the list of links generated in a collection or list of approvers in the approval list for a content folder or content block.	"Reordering List of Links" on page 285
	Restore	In the view history area, this button will initiate the process of restoring a previous published version of the content block.	"Restoring a Previous Version" on page 248
	Save	Used to save content that has been modified.	
	Search	Accesses the search content and library folder pages.	
	Show Calendar	Displays the calendar in the workarea.	"View Calendar" on page 201

Button	Name	Description	More Information
	Submit	When content editing has been completed clicking this button will save and submit the content to the next approver in the approval chain.	
	Update	In certain areas of the workarea, changes can be saved and updated, clicking this button will perform that operation.	
	View Date	Used to view all calendar events for a selected day.	"Viewing Calendar Events" on page 216
	View Difference	Opens the Ektron CMS200/300 compare utility.	"Redlining" on page 476
	View Form Reports	Displays reports about data entered via form modules. Note: This feature is only supported in Ektron CMS300.	"Viewing Form Reports" on page 257
	View History	This button will allow you to view the history of the corresponding content block.	"The Content History Window" on page 245
	View Published	This button will display the current published version of the content block that is live on the Web site.	
	View Staged	When a content block is not active, this button will display the current content that has been changed.	
	View XSLT	Displays the default XSLT for the XML configuration.	"Viewing Data Designer XSLTs" on page 122

Managing Content Folders

When you enter the Content folder in Ektron CMS200/300 as an Administrator, you will have the ability to control every aspect of the content and folders. Some of the controls include setting permissions, approvals, and adding, editing, publishing, and deleting content blocks. Shown below is the Content folder.
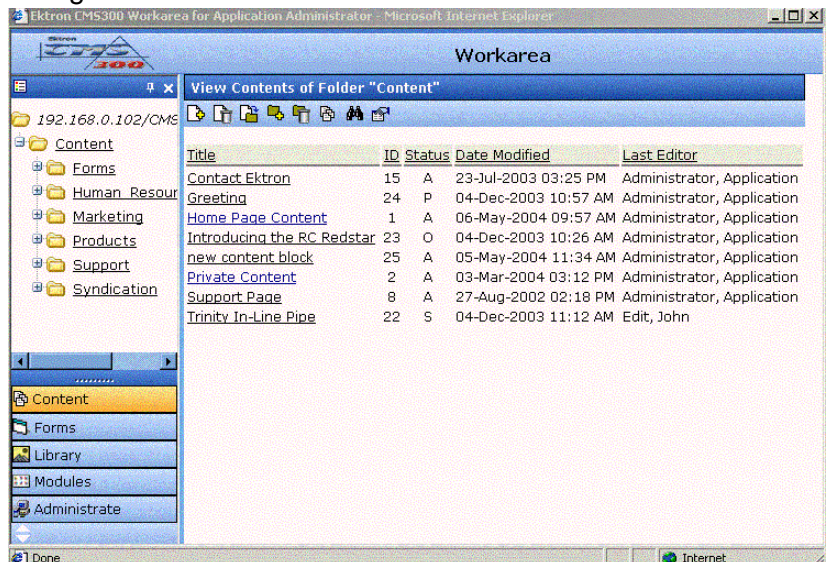
In this chapter you will learn about the add, edit, publish, and delete functions of content blocks. Permissions and Approvals will be discussed in further chapters.

What's In This Chapter

The following information is included in this chapter:

- • "Deleting Folders" on page 53
- • "Collections" on page 54
- • "Search Content Folder" on page 54

Accessing the Content Folder

To access the content manager:

1. Begin by accessing your Workarea.
2. Click on the content folder in the folder tree on the left side of the Workarea.

   A table of content blocks that belong to the root content folder are displayed in the main section of the Workarea, and the content folder expands to display the sub-folders.
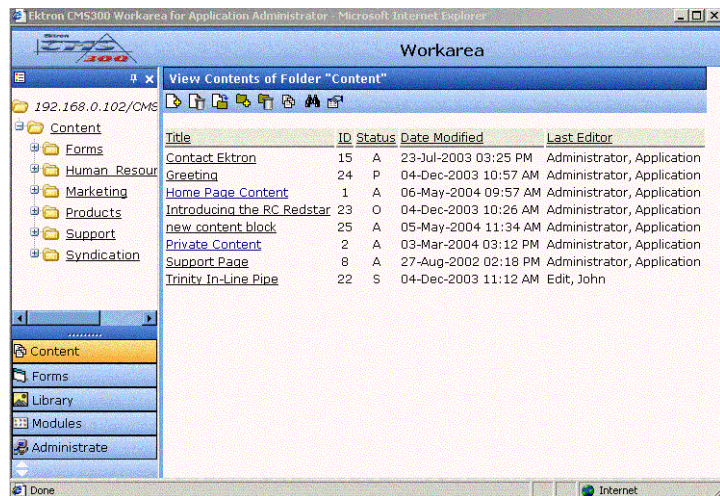
From the content folder, you will be able to perform may administrative tasks, as well as maintain content.

Each folder will have the following information about the content blocks when viewing them.

Field	Description
Title	The name given to the content block by the creator.

Field	Description
ID	The number assigned to the content block by Ektron CMS200/300 to allow the content to be called from the database properly.
Status	This is the current status of the content block.
Date Modified	The most recent date that the content block was added, edited, or published.
Last Editor	The last user who accessed the content block.

Additionally, in each folder, you will have the following options

Button	Name	Description	More Information
	Add Content	Click this button to open the editor, and create a new content block in the current folder.	"Adding Content" on page 57
	Delete Content	Allows you to delete multiple content blocks at once.	"Delete Content" on page 51
	Move Content	Allows you to move multiple content blocks from one content folder to another.	"Move Content" on page 51
	Add Folder	Click to add a sub-folder to the current folder.	"Adding Sub-Folders" on page 53
	Delete Folder	Click to delete the current folder. Note: You cannot delete the parent folder, "**Content**."	"Deleting Folders" on page 53
	Collections	Click on this button to add, edit, or delete a collection from the content folder.	"Collections" on page 54

Button	Name	Description	More Information
🔍	Search	Allows you to search through the content in the workarea.	"Search Content Folder" on page 54
🖳	Properties	Click to view the properties of the current folder. In the properties window, you will be able to set permissions, approvals, etc....	"Folder Properties" on page 47

Folder Properties

The folder properties page is where permissions and approvals can be set for the content folder.

Accessing The Folder Properties Page

To access the folder properties page:

1. Navigate to, and click on the content folder you wish to edit the properties for.

   The contents of the content folder are displayed in the main section of the Workarea.

2. Click on the **Properties** (🖳)button in the toolbar at the top of the page.

   The View Properties for the Folder page is displayed.
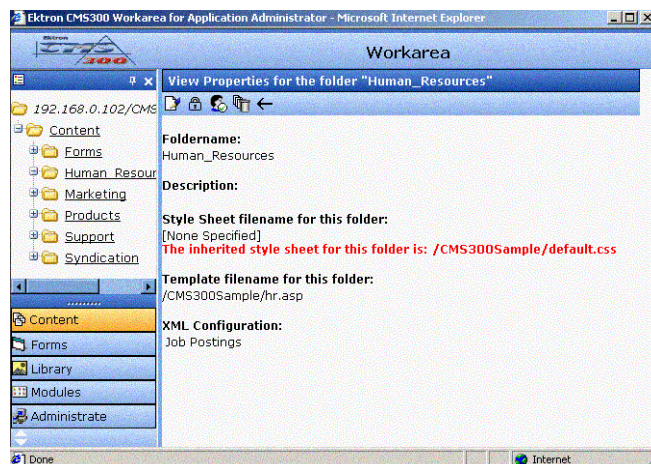
Folder Properties Toolbar

The folder properties page contains the following toolbar buttons.

Button	Name	Description	More Information
	Edit Properties	Accesses the edit folder properties page.	"Editing Folder Properties" on page 48
	Permissions	Accesses the permissions table for the content folder.	"Permissions & Approvals" on page 81
	Approvals	Accesses the approvals table for the content folder.	"Permissions & Approvals" on page 81
	Purge History	Accesses the purge history table for the content folder.	"Purge History" on page 50
	Back	Click on this button to go to the previous page.	

Editing Folder Properties

The folder name, style sheet, template, and XML configuration define the properties of a content folder. Once created, the properties of a content folder may be edited.

To edit the properties of a content folder:

1. Access the view properties page for the content folder you wish to edit as described in "Accessing The Folder Properties Page" on page 47.

2. Click on the edit button in the toolbar at the top of the page.

The edit properties page for the content folder is displayed.

3. Make the necessary changes to the content folder's properties. Use the following table to assist you.

Field	Description
Folder name	Edit the name given to the content folder.
Description	Description given to the content folder.
Style Sheet	Specify a new style sheet that defines the styles of the content blocks that belong to the content folder.
Template	Specify a new default template for the content folder.
XML Configuration	Choose the XML configuration to assign to the content folder from the drop down list, or check off the inherit box to inherit the XML configuration from the parent content folder.

4. Click on the **Update** button(![save icon]) to save and update the changes.

   The page is refreshed, and the changes are updated.

Purge History

The purge history option allows you to delete some or all of the historical records of all the content blocks in any given folder.

To purge the history for any given content folder, perform the following steps:

1. Access the view content folder properties page for the content folder you want to purge the history for as described in "Accessing The Folder Properties Page" on page 47.

2. Click on the **Purge History** button(![purge icon]) on the toolbar at the top of the page.

   The purge history screen is displayed.

3. Use the following table to modify the purge history options:

Field	Description	Required?
Select Date	Specify a date to limit the amount of historical records to be purged. When specified, only historical versions that occur before the date specified will be purged.	Yes
Recursive	Check off the recursive box to also purge historical records for content in sub-folders	No
Purge versions marked as "Published"	Check off this box to purge published versions of content blocks as well as checked-in versions.	No

4. Click on the **Purge History** button(![purge icon]) to execute the purge.

   A confirmation message is displayed.

5. Click **OK** to continue.

   Ektron CMS200/300 executes the purge process, and a confirmation page is displayed when complete.

6. Click the **Back** button(![back icon])in the toolbar to return to the folder properties page.

Delete Content

At the view content folder page, you can delete multiple content blocks at one time.

To delete multiple content blocks in a content folder, perform the following steps:

1. Begin by accessing the content folder that contains the content blocks that you wish to delete.

2. Click on the **Delete Content** button( ) from the toolbar.

   The "Delete Contents of Folder" page is displayed.

NOTE Only published and expired content blocks can be deleted.

3. Check off the boxes next to the content blocks that you would like to delete.

NOTE Check off the box in the header cell to select all or deselect all

4. Click on the **Delete Content** button( ).

   A confirmation message is displayed.

5. Click **OK** to continue.

   The content block(s) is/are deleted from the Ektron CMS200/300 Web site.

Move Content

Similar to deleting multiple content blocks at once, you can also move multiple content blocks at once.

Before You Move Content Blocks

Before you move content blocks, there is some information that you should be aware of. See "Moving Content" on page 71 for more information.

Moving Content

To move multiple content blocks at once, perform the following steps:

1. Navigate to the content folder that contains the content blocks that you would like to move.

2. Click on the **Move Content** button( ) from the toolbar.

   The "Move Contents of Folder" page is displayed.

NOTE Only published and expired content blocks can be moved.

3. Check off the boxes next to the content blocks that you would like to move.

NOTE Check off the box in the header cell to select all or deselect all

4. Choose the content folder to move the selected content blocks to from the drop down list.
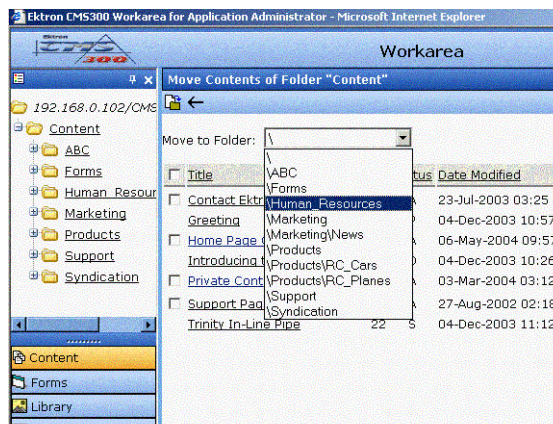
5. Click on the **Move Content** button( ) to move the selected content blocks.

   A confirmation message is displayed.

NOTE See "Before You Move Content Blocks" on page 51 for information about other messages that you may see.

6. Click **OK** to continue.

   The content block(s) is/are move to the destination folder specified.

Adding Sub-Folders

To further organize content in your Ektron CMS200/300 Web site, you can create sub-folders to store related content blocks.

To add a sub folder:

1. Begin by navigating to, and clicking on the folder you would like to create a sub-folder under in your Workarea.

2. Click on the **Add Folder** button( ) in the toolbar at the top of the page.

   The "Add a Subfolder to Folder" page is displayed.

3. Enter the required information in the proper fields. Use the following table to assist you.

Field	Description
Folder name	Enter a name for the content folder.
Description	Enter a description for the folder.
Style Sheet	Specify a style sheet that defines the styles of the content blocks that belong to the content folder. To inherit the style sheet from the parent content folder, leave this field blank.
Template	Specify a default template for the content folder. Leave blank to inherit the default template from the parent content folder.
XML Configuration	Choose the XML configuration to assign to the content folder from the drop down list, or check off the inherit box to inherit the XML configuration from the parent content folder.

4. Click on the **Save** button( ) to save the changes.

   The page will be refreshed, and the new sub-folder is now added to the content folder tree.

Deleting Folders

Content folders no longer needed may be deleted from the Ektron CMS200/300 Web site.

CAUTION!   Deleting a content folder will permanently delete the content blocks and quicklinks that belong to the content folder, as well as delete all sub-folders.

To delete a content folder:

1. In your Workarea, navigate to the content folder you wish to delete.

2. Click on the **Delete Folder** button(🗑) in the toolbar at the top of the page.

   A confirmation message is displayed.

3. Click **OK** to proceed.

   The page is refreshed, and the content folder is deleted.

Collections

Content blocks may be grouped together to form collections. Collections allow you to create user-maintained navigation for your Web site.

For information about creating and maintaining collections, see
"Collections" on page 277.

Search Content Folder

Searching the content folder(s) allows you to easily and quickly locate any content block within your Web site.

The following section explains how to use the content search in the Workarea.

Accessing the Search Content Page

To access the search content page, perform the following steps:

1. Navigate to any content folder in the Workarea

2. Click on the **Search** button(🔍) from the toolbar.

   The "Search Content Folder" page is displayed.
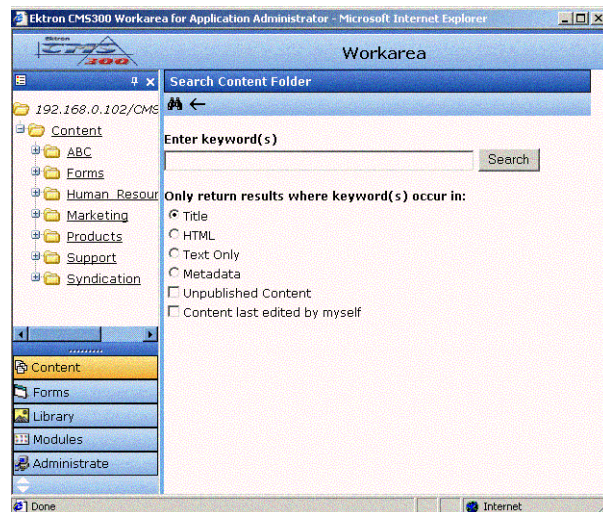
Searching Content

To perform a content search, perform the following steps:

1. Access the search content page as described in "Accessing the Search Content Page" on page 54.

2. Use the following table to customize your content search.

Field/Option	Description
Keywords	Enter keywords for the search.
Type of search	Customize the search to only return results that occur in: • **Content Title** - *searches only the titles of the content blocks.* • **HTML Only -** *searches both the content and the HTML tags of the content blocks (useful for searching for hyperlinks and images).* • **Text Only** - *searches only the raw text of the content block, no HTML* • **Metadata** - *searches the metadata assigned to the content blocks.*
Unpublished Content	Check off this box to search for the keywords in unpublished content blocks as well as published versions.

Field/Option	Description
Content last edited by myself	Check off this box to limit the search results to only content blocks that were last edited by you.

3. Click on the **Search** button(🔍) on the tool or click on the Search button next to the Enter keywords text field to execute the search.

   The search is executed and all results that match the search criteria are displayed on the search results page.

4. Click on a content title to access the view the properties for the content.

Managing Content

When you enter the Content folder in Ektron CMS200/300 as an Administrator, you will have the ability to control every aspect of the content and folders. Some of the controls include setting permissions, approvals, and adding, editing, publishing, and deleting content blocks. Shown below is the Content folder.
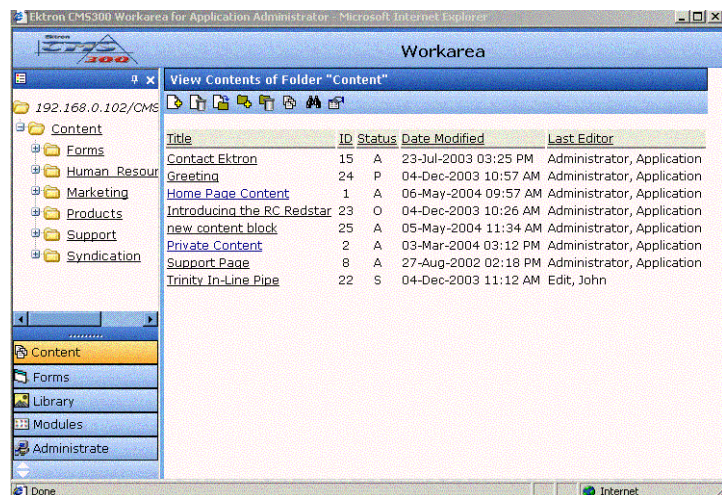
In this chapter you will learn about the add, edit, publish, and delete functions of content blocks. Permissions and Approvals will be discussed in further chapters.

Adding Content

Adding HTML Content

Content folders that do not have an XML configuration assigned to them will cause the content blocks to be created in HTML. As an administrator, you will have the ability to add content to the Ektron CMS200/300 Web site. Adding content means that you create content blocks for your Web site to display on your Web pages.

To add HTML content, follow the steps below.

1. In your Workarea, browse to the content folder where you want to create the new content block.

NOTE   When selecting the folder to create the content in, keep in mind the permissions that are going to be set on it, and which users will have certain permissions on it.

2. Click on the **Add Content** button( ) from the toolbar.

   The "Add Content" window opens.

3. Create content in the editor using the following table.

Field	Description
Title	Enter a title for the content block.
Comment	Add a comment to briefly describe your content, or comment on changes made when editing a content block.
Add to Quicklinks Table	By checking off this box, when the content is saved, a Quicklink to the content block on the Web site will be saved into the database. If you uncheck this box, then the application will not create a quicklink for the content block that you are adding.

Field	Description
Content Searchable	By checking off this box, when doing an external search on your CMS web site, the application will be able to search for this content block. If you uncheck this box, the application will not display the content block when doing a search.
Start Date	Select a date and time when the content will be viewable by the public, assuming the content has been approved.
End Date	Select a date and time the content block will not be viewable by the public, assuming the content block is published before the date and time.
Body Text	Insert body text that will be viewed on the Web site.

NOTE For additional information about using the editor supplied with Ektron CMS200/300, refer to "Using eWebEditPro" in the Ektron CMS200/300 *User Manual.*

4. When you have finished entering the body text, you have the following options.

Button	Name	Description
	Edit Summary	Click this button to edit the summary for the content block.
	Edit Metadata	Click this button to edit the metadata that will correspond to this content block.
	Submit	Click this button to submit the content block into the approval process.
	Publish	Click this button to publish the content to the Web site. Note: Only the last approver in the respective approval chain will see the PUBLISH button.

Button	Name	Description
	Check In	Click this button to save and check-in the document. Clicking on this button will not submit the content into the approval process, but rather allow other users to make changes to it.
	Save	Click this button to save the content without submitting it into the approval process. When a user clicks save, and closes the content editor, other users will not have the ability to edit the content.
	Cancel	Click this button to close the editor without saving any of your changes.

Adding XML Content

NOTE This feature is only available with Ektron CMS300. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.
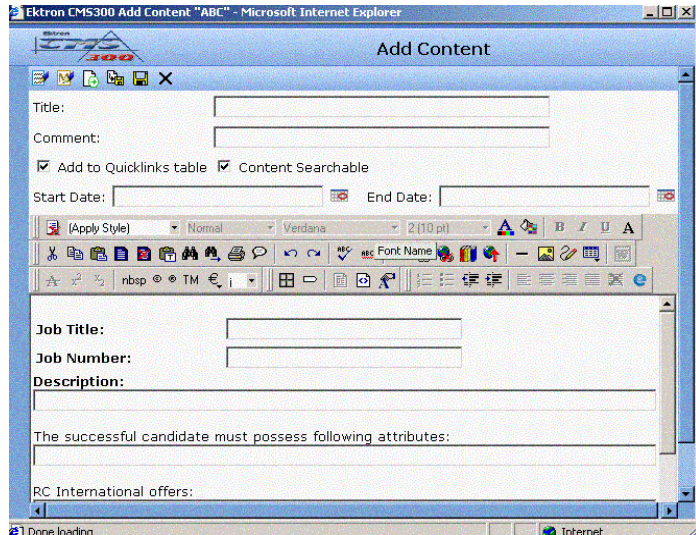
If a content folder has an XML configuration assigned to it, users will be able to create XML content within that folder.

To add an XML content, follow the steps below.

1. In your Workarea, browse to an XML content folder where you want to create the new XML content block.

NOTE When selecting the folder to create the content in, keep in mind the permissions that are going to be set on it, and which users will have certain permissions on it.

2. Click on the **Add Content** button( ) from the toolbar.

   The "Add Content" window opens.

NOTE   Depending on the XML configuration assigned to the content block, the default XML may appear differently.

3. Create content in the editor using the following table.

Field	Description
Title	Enter a title for the content block.
Comment	Add a comment to briefly describe your content, or comment on changes made when editing a content block.
Add to Quicklinks Table	By checking off this box, when the content is saved, a Quicklink to the content block on the Web site will be saved into the database. If you uncheck this box, then the application will not create a quicklink for the content block that you are adding.
Content Searchable	By checking off this box, when doing an external search on your CMS web site, the application will be able to search for this content block. If you uncheck this box, the application will not display the content block when doing a search.

Field	Description
Start Date	Select a date and time when the content will be viewable by the public, assuming the content has been approved.
End Date	Select a date and time the content block will not be viewable by the public, assuming the content block is published before the date and time.
Body Text	Insert body text that will be viewed on the Web site.

NOTE   For additional information about using the editor supplied with Ektron CMS200/ 300, refer to "Using eWebEditPro" in the Ektron CMS200/300 *User Manual.*

4. When you have finished entering the body text, you have the following options.

Button	Name	Description
	Edit Summary	Click this button to edit the summary for the content block.
	Edit Metadata	Click this button to edit the metadata that will correspond to this content block.
	Submit	Click this button to submit the content block into the approval process.
	Publish	Click this button to publish the content to the Web site. Note: Only the last approver in the respective approval chain will see the PUBLISH button.
	Check In	Click this button to save and check-in the document. Clicking on this button will not submit the content into the approval process, but rather allow other users to make changes to it.

Button	Name	Description
	Save	Click this button to save the content without submitting it into the approval process. When a user clicks save, and closes the content editor, other users will not have the ability to edit the content.
	Cancel	Click this button to close the editor without saving your changes.

Forming URLs For Ektron CMS200/300 Documents

The URL to an Ektron CMS200/300 content block is composed of three elements:

- The site address
- The template's file name
- The content block's ID number

The default template URL is the address of the default template file in the web server's file system. By itself, the template URL would retrieve the empty template or the template with its default document (the default document for a template can be set in the content function by inserting the id number).

The template URL is separated from the URL variables by a question mark. The URL variables indicate which document or

content blocks the server will place in the template before serving the page. Listed below is a description of the format of the URL:

Variable	Example	Description
ID=n	http://www.yoursite.com / index.asp?ID=1	ID selects a single document to display. This variable would be used for a template of the single document template type. The value corresponds to the "id" value in the "content blocks" table of the database.

The above variable's name is based upon the name of variable in the templates that are included in the Ektron CMS200/300 sample site. If your web master has changed the names of this variable in your site's template you will need to use the name of the corresponding variable in each template rather than the one above.

Viewing Content

You can preview all content blocks that have been created in your Ektron CMS200/300 Web site. Previewing content blocks allows you to view the content, metadata, summaries, and other information regarding the content block.

To view a content block in Ektron CMS200/300:

1. Navigate to the content folder that contains the content block you wish to preview.

   A table of content blocks that belong to the selected folder is displayed.

2. Click on the title of the content block you wish to view.

3. The "View Content" page is displayed.
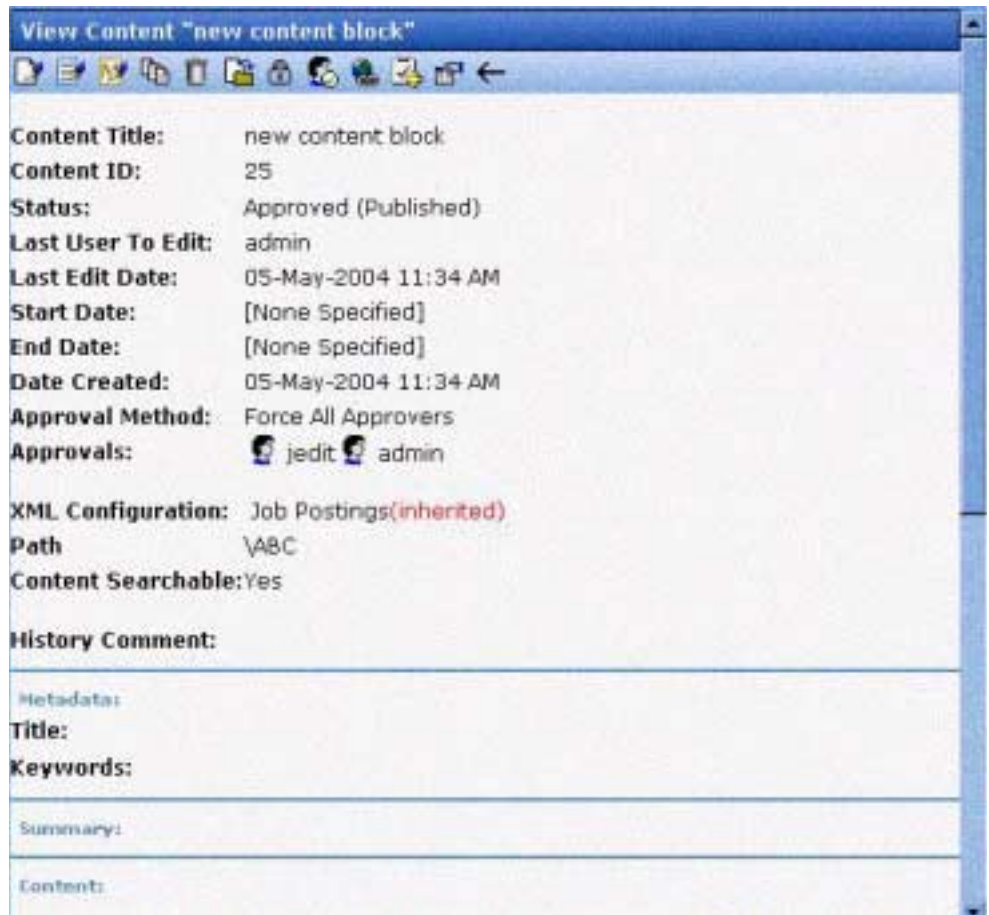
The view content page contains information about the selected content block including:

Field	Description
Content Title	Title assigned to the content block.
Content ID	Content ID # that is assigned to the content block by Ektron CMS200/300.
Status	Status is the current state that the content block is in.
Last User to Edit	Last user to edit this content block.
Last Edit Date	Date and time when this content block was last edited.

Field	Description
Start Date	Date and time when the content block will go live on the Web site.
End Date	Date and time when the content will be removed from the Web site.
Date Created	Date and time when this content block was created.
Approval Method	The type of approval method that was used for this content block.
Approvals	Approval chain for this content block.
XML Configuration for this content	Displays the XML configuration that is assigned to the content block, or inherited from the content folder. If no XML configuration is assigned, Ektron CMS200/300 assumes the content is strictly HTML.
Path	Displays the folder path, within Ektron CMS200/300, for the content block.
Content Searchable	Tells you whether the content block is searchable or not.
History Comment	Comment that was added when the content block was created or edited.
Metadata	Defined metadata for the content block.
Summary	Summary for the content block.
Content	Body of the content block.

Content Status

Depending on the status of the content, there will be different toolbar options displayed. Listed in the table below are the different content states.

Letter	Meaning	Description
A	**Approved** Green Border	The content has been through the entire workflow and has been published on the Web site.
O	**Checked Out** Red Border	The content is currently being edited by an editor, and hasn't been checked back in for publishing.

Letter	Meaning	Description
I	**Checked In** Green Border	The content has been checked in for other users to edit.
S	**Submitted for Approval** Yellow Border	The content block has been saved and submitted into the approval chain.
M	**Marked For Deletion** Yellow Border	This content has been requested to be deleted from Ektron CMS200/300.
P	**Pending Start Date** Grey Border	This content has been approved, but the Start date hasn't occurred yet.

When you select different content blocks with different content states, you will be able to perform many different options. In the next section, we will discuss the options of an administrator with the different content states.

Content Toolbar Buttons

The following table displays all the possible toolbar buttons that will appear. Depending on the status of the content block, some of the toolbar button will not appear.

Button	Name	Function	More Information
	Edit	Check out content block to change it.	"Editing Content" on page 69
	Edit Summary	Edit the brief summary used to describe the content.	"Summaries" on page 74
	Edit Metadata	Change the metadata for the content block.	"Metadata" on page 75

Button	Name	Function	More Information
	View History / Audit Trail	Displays all published versions of the content block. Also lets you restore an older version.	"Content History" on page 76
	Check In	Check the content block back in so other users can edit it.	
	Submit	Submit the content block to the next approver in the approval chain.	
	Publish	Click on the **PUBLISH** button to approve and publish the content block to the Web site. NOTE: You will only have this option if you are the last approver in the chain.	
	Decline	Click on the **DECLINE** button to decline the submitted content block, and place the content into a checked-in state.	"Approving/ Declining Content Blocks" on page 262
	View Staged/ Published	Click on the **View Staged** button to view the content that has not yet been published. Click the **View Published** button to view the content that is live on the Web site.	
	Delete	Click on the **Delete** button to submit a request to other approvers in the approval chain to delete the content from Ektron CMS200/300. If you are the last or only approver, the content will be immediately deleted.	"Deleting Content" on page 73
	Move Content	**Move Content** will allow you to move the content block to another folder.	"Moving Content" on page 71

Button	Name	Function	More Information
	Permissions	Click on the **Permissions** button to assign permissions to the content block. By default, permissions are inherited from the parent folder.	"Setting Permissions" on page 87
	Approvals	Click on the **Approvals** button to set up an approval chain for that content block. By default, approvals are inherited from the parent folder.	"Setting Approval Chains" on page 90
	Link Check	Searches for content blocks that contain a link to the displayed content block.	"Link Checking" on page 77
	Add Task	Allows you to assign a task to a user in regards to the selected content block. Note: This feature is only supported in Ektron CMS300.	"Assigning Tasks to a Content Block" on page 78
	Edit Properties	The edit properties button allows you to change the XML configuration that has been assigned to the content block.	"Content Properties" on page 79
	Back	Click on the **Back** button to go to the previous window.	

Editing Content

In Ektron CMS200/300, there are two types of content blocks:

- HTML Content Blocks - no XML configuration assigned to the content.
- XML Content Blocks - XML Configuration assigned to the content

The following sections explains editing both types of content blocks.

Editing HTML Content

As an administrator, you will have the option to edit any content block that has been created in your Web site.

To edit a content block:

1. Access the View Content page, for the content block you wish to edit, as described in "Viewing Content" on page 64.

2. Click on the **Edit** button( ) from the toolbar.

    The "Edit Content" window opens.

3. Make the necessary changes to the content block.

    Use the following table to assist you with each of the fields.

Field	Description
Title	Modify the title assigned to the content block.
Comment	Add a comment to explain the edits that you made to the content block.
Start Date	If desired, specify a date and time the edited content will be visible on the Web site, assuming the content block makes its way through its respective approval chain.
End Date	If desired, specify a date and time the content block will be removed from the Web site.
Body	Make the necessary edits to the content.

When completed, choose one of the available workflow options displayed in the toolbar at the top of the edit content window.

Editing XML Content

Editing XML content is similar to editing HTML content. Content blocks that belong to a content folder that has an XML configuration assigned to it will contain XML content.

NOTE	You may only edit content blocks that are published, checked in, checked out by you, or submitted for your approval.

To edit an XML content block:

1. Access the View Content page, for the XML content block you wish to edit, as described in "Viewing Content" on page 64.

2. Click on the **Edit** button( ) from the toolbar.

   The "Edit Content" window opens.

3. Make the necessary changes to the content block.

   Use the following table to assist you with each of the fields.

Field	Description
Title	Modify the title assigned to the content block.
Comment	Add a comment to explain the edits that you made to the content block.
Start Date	If desired, specify a date and time the edited content will be visible on the Web site, assuming the content block makes its way through its respective approval chain.
End Date	If desired, specify a date and time the content block will be removed from the Web site.
Body	Make the necessary edits to the content.

When completed, choose one of the available workflow options displayed in the toolbar at the top of the edit content window.

Moving Content

A content that has been created in any given content folder can easily be moved to another content folder if necessary.

Before You Move a Content Block

Since content is either HTML or XML content in Ektron CMS200/ 300, there are several scenarios that you may come across when you are moving a content block from one folder to another.

The following table explains each of the scenarios:

Content to be moved	Destination Folder	Issues?
HTML	HTML Only	None
	XML Content Folder	Content does not use XML configuration applied to content folder. If desired, this needs to be set in the content block properties section.
XML (inherited from parent)	HTML Only	Content inherits properties of the destination folder. Can be changed on the folder or content block levels.
	XML Content Folder	
XML (not inherited from parent)	HTML Only	Content keeps XML configuration assigned to it. Content. Can be changed on the folder or content block levels.
	XML Content Folder	

When Can a Content Block Be Moved?

Only a content block with a status of **Approved (Published)** can be moved (this included expired content).

If a content block that you would like to move is in a state other than published, you must wait for it to reach the published status before you can move it.

What is Moved?

When a content block is moved from one content folder to another, the content inherits all the permissions and workflows that are assigned to the destination folder.

On top of this, the quicklink for the content block is moved in the library to the destination folder. However, the quicklink remains the same (that is, the default template doesn't change). However, this can be updated by editing the quicklink.

Moving a Content Block

To move a content block to another content folder, perform the following steps:

1. Access the View Content page, for the content block you wish to move, as described in .

2. Click on the **Move Content** button( ) from the toolbar.

   The "Move Content" page is displayed.

3. From the displayed drop down list, choose the content folder you would like to move the content to.
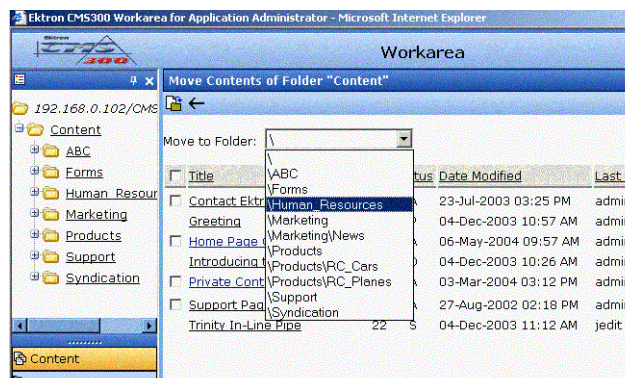
4. Click on the **Move Content** button( ) from the toolbar.

   A confirmation message is displayed.

5. Click **OK** to continue.

   The content block is moved to the specified content folder and the destination folder is displayed with the content block that was moved.

Deleting Content

Content blocks that are no longer needed in your Web site may be deleted permanently from the Ektron CMS200/300 database.

To delete a content block:

1. Access the View Content page, for the content block you wish to delete, as described in "Viewing Content" on page 64.

2. Click on the **Delete** button(🗑) from the toolbar.

   A confirmation message is displayed.

3. Click **OK** to delete the content block.

   The page will be refreshed, and the updated content table is be displayed.

Summaries

Content block summaries are generally used as an abstract for the full content.

Your Web site developer can create Web pages that contain just the content summaries to attract readers to the full story.

NOTE   You may only edit the summary of content blocks that are published, checked in, or checked out by you.

To edit the summary for a content block:

1. Access the View Content page, for the content block you wish to edit the summary for, as described in "Viewing Content" on page 64.

2. Click on the **Edit Summary** button(📝) from the toolbar.

   The "Edit Summary" window opens.
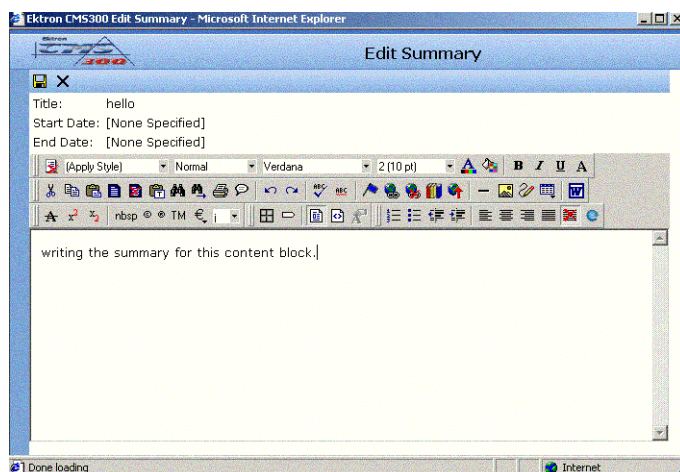
3. Make the necessary changes to the summary.

4. Click on the **Save** button(🖫) from the toolbar to save your changes.

   The summary is saved, and the "View Content" page is displayed with a status of checked out.

Metadata

A content block's metadata helps search engines to locate your content quickly and efficiently. The metadata set for a content block may be edited at any time.

NOTE   You may only edit the metadata of content blocks that are published, checked in, or checked out by you.

To edit the metadata for a content block:

1.

2. Click on the **Edit Metadata** button(🅜) from the toolbar.

   The "Edit Metadata" window opens.
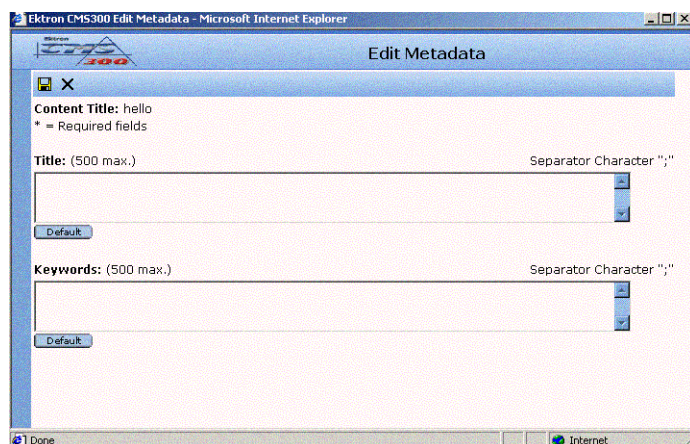
3. Make the necessary changes to the metadata.

4. Click on the **Save** button(🖫) from the toolbar to save your changes.

   The changes are saved, and the "View Content" page is displayed with the status set to checked out.

Content History

Each time a new version of a content block is published or checked-in, the previous version is stored in a history table. Old versions of a content block may be accessed in the view history table, and if desired, may be restored to the Web site.

Accessing the View History Window

To access the view history window:

1. Access the View Content page, for the content block you wish to view the history of, as described in "Viewing Content" on page 64.

2. Click on the **View History** button(🖭) from the toolbar.

   The content history page opens in a new window.
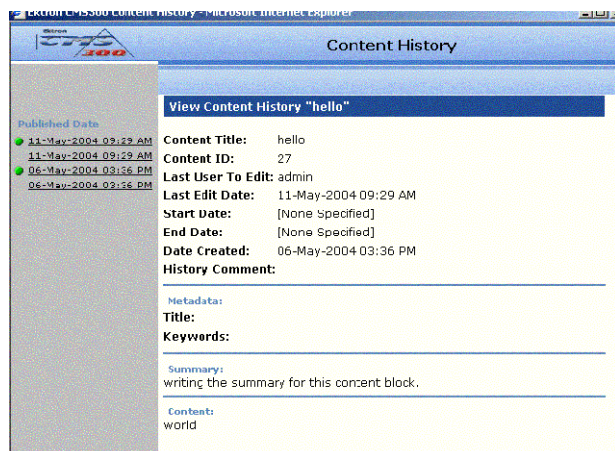
Managing Historical Version

For information about managing historical versions of content including:

- Viewing historical versions
- Comparing versions
- Restoring historical version

See "Content History" on page 244.

Content Block Permissions

See "Setting Permissions" on page 87.

Content Block Approvals

See "Setting Approval Chains" on page 90.

Link Checking

The link checker button allows you to locate all the content blocks that link to the displayed content block. This feature is very useful if, and when, you decide to delete a content block from the Web site.

To use the link checker to display all content blocks that link to the selected content block, perform the following steps:

1. Access the View Content page, for the content block you wish to execute the link checker for, as described in "Viewing Content" on page 64.

2. Click on the **Check Links** button(🌐) from the toolbar.

   The search results page is displayed with each content block that links to the current content block listed.

3. Click on the content title to access the view content page for the selected content block and perform the necessary actions on the content.

Assigning Tasks to a Content Block

Tasks can be assigned to Ektron CMS200/300 users as a way to let other users know that some sort of action needs to be performed on them. Assigning tasks from the View Content Block page, which allows you to *attach* the content block to the task.
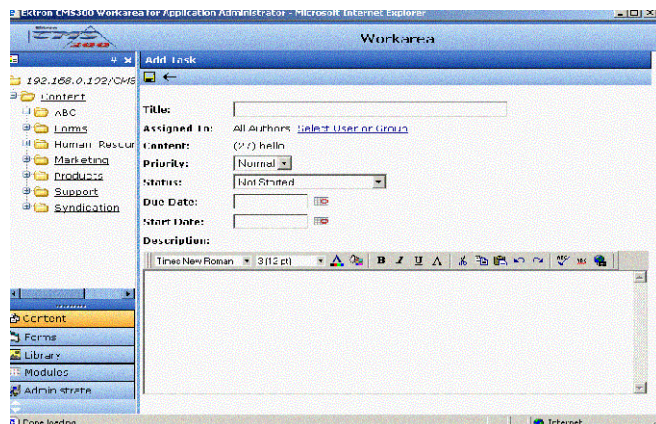
To assign a task, perform the following steps.

2. Click on the **Add Task** button( ) from the toolbar.

   The "Add Task" page is displayed.

3. Use the following table to assist you with completing the add task form.

Field	Description
Title	Specify a title for the task. (for example, Edit this content block!)

Field	Description
Assigned to	Select the user(s) or usergroup(s) to assign the task to.
Content	Displays the content block "attached" to the task.
Priority	Specify the priority of the task.
Status	Specify the current status of the task.
Due date	Specify the date when the task needs to be completed by.
Start date	Specify a date when you would like the task to be started.
Description	Add any additional comments about the task.

4. Click on the **Save** button(🖫) from the toolbar to save your changes.

    The task is saved, and the "View Tasks" page is displayed with the new task added.

Content Properties

The content properties page shows which XML configuration, if any, is applied to the content block.

To view the content properties page, perform the following steps:

1. Access the View Content page, for the content block you wish to view the content properties, as described in "Viewing Content" on page 64.

2. Click on the **Properties** button( ) from the toolbar.

   The "View Properties for the Content" page is displayed.
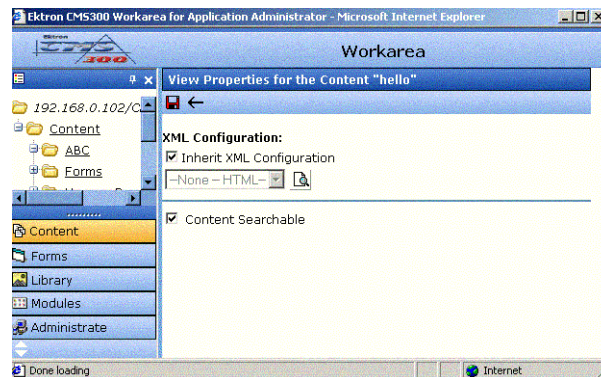
3. Make any necessary changes. See "Assigning XML Configurations" on page 104 for more information.

4. Click on the **Update** button( ) from the toolbar to save the changes.

   The properties are saved, and the "View Content" page is displayed.

NOTE   If you click on the properties button for a content block that is displayed on a web page, it will open the View Content page in the workarea window.

Permissions & Approvals

Content Folders & Content Blocks

Permissions and approvals can be set on a content folder or content block level. Setting permissions and approval chains on either level is identical.

Setting Permissions & Approvals on Content Folders

Permissions in the Content Manager determine which Users or User Groups have the ability to perform certain tasks to content, library items, and content folders.

As the administrator to the Ektron CMS200/300 web site, you are the only person who is allowed to set the permissions for the content folders and content blocks.

Permissions and approval chains can be set to a content folder from the "Folder Properties" page for any content folder in Ektron CMS200/300.

Displayed here are the Permissions and Approvals buttons on the "Folder Properties" page.
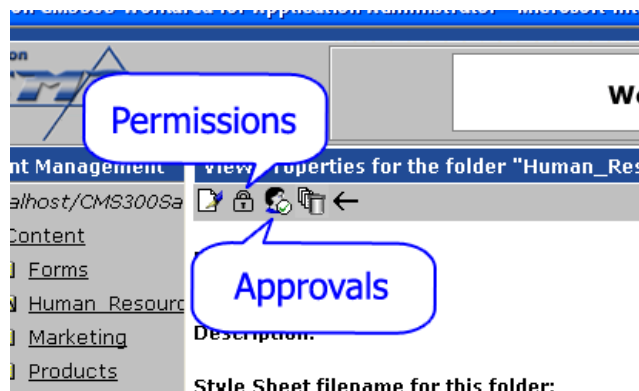
On the "View Folder Properties" page, click on either of these buttons to either set permissions or an approval chain on the content folder.

See "Setting Permissions" on page 87 and "Setting Approval Chains" on page 90 for additional information.

Setting Permissions & Approvals on Content Blocks

At times, there may be the need to single out a specific content block in a content folder. Any user that has permissions to a specific content folder, has permissions to all the content blocks in that content folder. You may, however, specify unique permissions to a single content block in a content folder

Permissions and approval chains can be set to a content block from the "View Content' page for any content block in Ektron CMS200/300.

Displayed here are the Permissions and Approvals buttons on the "View Content" page.
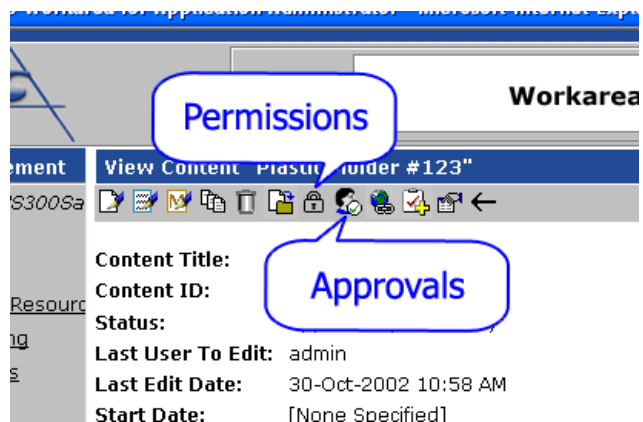
On the "View Content" page, click on either of these buttons to either set permissions or an approval chain on the content block.

See "Setting Permissions" on page 87 and "Setting Approval Chains" on page 90 for additional information.

Inheritance

By default, all content folders and content blocks inherit permission settings from their respective parent folders.

To modify the permissions and/or approval chains to a content folder or content block that inherits permissions settings, there are two options.

- Modify the permissions in the parent folder
- Break inheritance and add users to the folder

Breaking Inheritance

To break inheritance from the parent folder, perform the following steps:

1. Access the permissions table for a content folder or content block in your Workarea as described in "Accessing the Permissions Table" on page 87.

2. Remove the check mark from the box that says "Allow this object to inherit permissions."

   A confirmation message is displayed.

3. Click **OK**.

   The page refreshes, and you are now able to make changes to the permissions table.

Restoring Inheritance

To restore inheritance for a content folder or content block, perform the following steps:

1. Access the permissions table for a content folder or content block in your Workarea as described in "Accessing the Permissions Table" on page 87.

2. Place a check in the box that says "Allow this object to inherit permissions."

   A confirmation message is displayed.

3. Click **OK**.

   The page refreshes and the permissions and approvals are now inherited from the parent folder.

Private Content

Private content is content that is only viewable by users that are logged into the Ektron CMS200/300 Web site *and* have *at least* Read-Only permissions on the content block or folder.

NOTE   You may only set a content block to private when inheritance is broken.

Setting Content Private

To set a content folder or content block to be private, perform the following steps:

1. Access the permissions table for a content folder or content block in your Workarea as described in "Accessing the Permissions Table" on page 87.

2. Check off the box that says "The content in this folder is private and is NOT viewable on the public Web site."

   A confirmation message is displayed.

3. Click **OK** to complete the process.

   The content block or content folder is now set to private.

NOTE   See "Private Content & Memberships" on page 380 for additional information.

CMS Users vs. Membership Users

Icon	Description
Users	CMS Users are designated by a single head. The CMS user is displayed in blue color.

Icon	Description
User Groups	CMS User Groups are designated by two heads. The CMS User Group is displayed in blue color.
Membership User	Membership Users are designated with a single head. The Membership User is displayed in red color.
Membership User Groups	Membership User Groups are designated by two heads. The Membership User Group is displayed in red color.

Standard & Advanced Permissions

The permissions for each content folder and content block are split into two categories:

- Standard Permissions
- Advanced Permissions

The following table explains each of the available permissions in Ektron CMS200/300.

Category	Permission	Allows user/user group to...
Standard	Read Only	View the content in the content folder.
	Edit	Edit content blocks in the content folder.
	Add	Add content blocks to the content folder.
	Delete	Delete content blocks in the content folder.
	Restore	Restore historical versions of content blocks that belong to the content folder.
	Library Read Only	View items in the library folder that corresponds to the content folder.
	Add Images	Upload images to the library folder that corresponds to the content folder.
	Add Files	Upload files to the library folder that corresponds to the content folder.
	Add Hyperlinks	Add hyperlinks to the library folder that corresponds to the content folder.
	Overwrite Library	Overwrite images and files that belong to the library folder that corresponds to the content folder.
Advanced	Collections	Manage collections.
	Add Folders	Add sub folders to the content folder.
	Edit Folders	Edit folder properties.
	Delete Folders	Delete content folders.
	Traverse Folders	View the sub-folders under the main content folder. By default the everyone user group has permission to view all sub-folders.

Standard permissions are basic permissions, where as advanced permissions allow the user to perform administrator-like functions on the Web site.

Setting Permissions

Accessing the Permissions Table

To access the permissions table, perform the following steps:

1. For *Content Folders*, access the "Folder Properties" page.

    For *Content Blocks*, access the "View Content" page.

2. Click on the **Permissions** button(🔒) from the toolbar.

    The permissions table is displayed.

    ☑ Allow this object to inherit permissions.
    ☐ The content in this folder is private and is NOT viewable on the public Web site.

    View Advanced Permissions   View MemberShip users

User or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images	Add Files	Add Hyperlinks	Overwrite Library
👥 Everyone	X	X	X	X	X	X	X	X	X	

Adding a User or User Group to the Permissions Table

To add a user or user group to the permissions table, perform the following steps:

NOTE   Before you can add users and users to the permissions table, you must first break inheritance. See "Inheritance" on page 83 for more information.

1. Access the view permissions page for the content folder or content block you wish to set permissions for as described in "Accessing the Permissions Table" on page 87.

2. Click on the **Add** button(➕) from the toolbar.

    The "Add Permissions" page is displayed. Only users and user groups that have *not* already been added to the permissions table are displayed.

3. Click on the name of the user or user group you want to add to the permissions table.

    The "Add Permissions" page is displayed.

4. Set the standard and advanced permissions for the user/user group using the table in "Standard & Advanced Permissions" on page 85 as a reference.

NOTE	Click the enable all link to enable all standard permissions automatically.

5. Click on the **Save** button(💾) from the toolbar.

    The page is refreshed, and the updated permissions table is displayed.

NOTE	If a user and its respective user group are both given permissions to a specific folder, then the user will have all the permissions he/she has been assigned, as well as, the permissions the user group has been assigned.

Continue this process until you have added and assigned all the permissions to all the users and user groups you would like.

NOTE	You can only set any permission for a content block or folder for a CMS user or user group. By default you can only assign standard Read Only permission to a Membership user or user groups.

Editing User or User Group Permissions

If you would like to give more, or take away, permissions to a user or user group, you can do so by editing the user or user group in the permissions table.

To edit permissions for a user or user group, perform the following steps:

1. Access the view permissions page for the content folder or content block you wish to edit permissions for as described in "Accessing the Permissions Table" on page 87.

2. Click on the User or User Group name you would like to edit the permissions for.

    The "Edit Permissions" page is displayed.

3. Place a check in the boxes for permissions you wish to assign to the user or user group, or remove the check mark from the box to take away the permission.

4. Click on the **Update** button(📕) from the toolbar to save your changes.

   The page is refreshed and the updated permissions table is displayed.

Deleting Users or User Groups from the Permissions Table

If you would like to remove a user, or a user group's permissions, you can easily do so by utilizing the delete button on the View Permissions window.

To delete users or user groups from the permissions table, perform the following steps:

1. Access the view permissions page for the content folder or content block you wish to edit permissions for as described in "Accessing the Permissions Table" on page 87.

2. Click on the **Delete** button(🗑) from the toolbar.

   The "Remove Permissions" page is displayed.

3. Click on the username or group name of the user or user group you would like to remove from the permissions table.

   A confirmation message is displayed.

4. Click on the **OK** button to proceed.

   The page is refreshed, and the permissions table displays the updated permissions.

NOTE   If you delete the permissions of a user or user group, the changes will automatically be propagated to all the sub-folders and content. Also, if the user or user group was part of an approval chain, they will be removed.

Setting Approval Chains

An approval chain for a content folder or content block ensures that the proper user approves the content changes before the content is published on the Web site.

An approval chain can be made up of as many users or user groups you wish. However, to be eligible to be an approver in an approval chain, the user/user group must first have permissions to the content folder or content block.

When setting the approval chain for a content folder or a content block, the administrator will now be able to determine how the approval chain should work by setting up the default configuration for the application. Admin will also be able to override the default settings for each approval chain. The are two approval method options that are available are -Force All Approvers and Do Not Force All Approvers.

Approval Method:
○ Force All Approvers
◉ Do Not Force All Approvers

Selecting the "*Force All Approvers*" option will force all the users in the approval chain to approve the content before it goes live. For Example: The Approval Chain is set as

User A -->User B -->User C -->User D --> User E

If user D, who is the second last approver in the list submits the content, even though there is just one user after him, the content will go through the approval process, starting from the first user in the list. That is, user A.

Selecting the "*Do Not Force All Approvers*" option will not force all the users in the approval chain to approve the content before it goes live. For Example: The Approval Chain is set as

User A -->User B -->User C -->User D --> User E
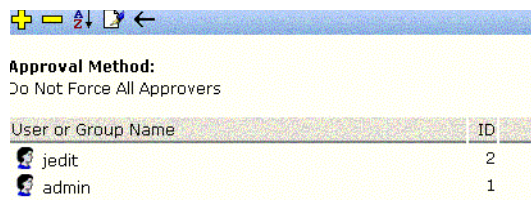
If user D submits a content, User E who is the next approver in the chain, approves the content and the content goes live. In "Do Not Force All Approvers" option, only the approvers who are there in the list after the user who is submitting the content will approve the content and not all the approvers.

Accessing the Approvals Table

To access the approvals window, perform the following steps:

1. For *Content Folders*, access the "Folder Properties" page.

    For *Content Blocks*, access the "View Content" page.

2. Click on the **Approvals** button(📷) from the toolbar.

    The approvals table is displayed.

Setting Approval Method

To set the approval method for a content folder or content block, perform the following steps:

1. Access the approval table as described in "Accessing the Approvals Table" on page 91.

2. Click on the **Edit** button(📝) from the toolbar.

    The "Edit Approval Method" page is displayed.

3. Select the approval method by clicking on the radio button next to the option.

4. When complete, click on the **Save** button(💾) to save your changes.

    The page is refreshed, and the updated approvals table is displayed.

Adding Approvers

To add users to the approval list, perform the following steps:

1. Access the approval table as described in "Accessing the Approvals Table" on page 91.

2. Click on the **Add** button( ) from the toolbar.

   The "Add Approvals" page is displayed.

NOTE	Only users that have been given permissions to the content folder may be included in the approval chain. See "Adding a User or User Group to the Permissions Table" on page 87 for more information.

3. Click on the name of the user you wish to add to the approval chain for the content folder.

   A confirmation message is displayed.

4. Click **OK**.

   The updated approvals table is displayed.

5. Repeat steps 2-4 until you have added all the desired users or user groups to the approvals table.

NOTE	When you assign a user group to an approval process, only one member of the group will need to approve the content, not all members.

NOTE	The order in which you add the user or user groups in the approval list can be set by clicking on the reorder button from the toolbar and then clicking on the up and down arrow key to move the user or user groups position in the approval chain.

Editing the Approval Order

After you have assigned the approvers to the content folder, you will probably want to adjust the order of the approval chain. In most cases, you will want the user or the user group with more authority to be at the end (bottom) of the approval chain, and the users or user groups with the least amount of authority at the beginning (top).

In this example, the order will be:

Everyone > jedit

To edit the approval order, perform the following steps:

1. Access the approval table as described in "Accessing the Approvals Table" on page 91.

2. Click on the **Reorder** button(🔽) from the toolbar.

   The "Edit Approval Order" page is displayed.

3. Click on the name of the user or user group you want to move in the approval chain.
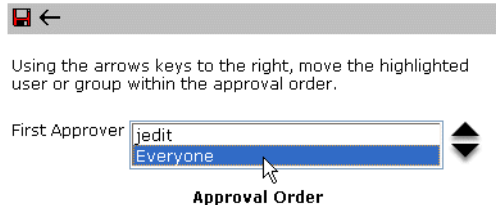
4. Click on the **Up** (▲) or **Down** (▼) arrow to move the user or user group to the desired location in the approval chain.
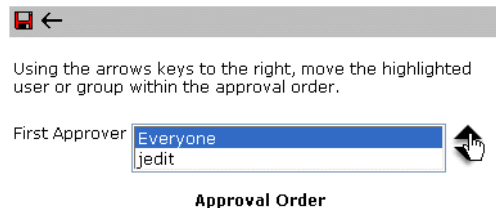
5. When complete, click on the **Save** button(💾) to save your changes.

   The page is refreshed, and the updated approvals table is displayed.

Deleting a User or Group from the Approval Chain

There may be cases in which you would like to remove a user or user group from an approval chain.

NOTE If a user that belongs to an approval chain is deleted from the permissions table, they will also be automatically deleted from the approval chain.

To delete a user or user group from an approval chain, perform the following steps:

1. Access the approval table as described in ”Accessing the Approvals Table” on page 91.

2. Click on the **Remove** button( ) from the toolbar.

   The "Remove Approval" page is displayed.

3. Click on the name of the user or user group you wish to remove from the approval chain.

   A confirmation message is displayed.

4. Click **OK**.

   The updated approvals table is displayed.

Managing XML

Ektron CMS200/300 allows you to access the full power of XML by separating Web content from presentation. In addition to hiding the XML tags from users, Ektron CMS200/300 can serve content across various presentation devices (e.g., PDAs, mobile phones, WebTV), saving users from the tedious task of creating duplicate content. Both review and revision effort is drastically reduced because the accuracy and format of your Web content is managed using XML schema validation.

Using XML with Ektron CMS200/300 provides you with the following benefits:

- Strictly enforce content and page layout with Ektron's editor (Ektron eWebEditPro+XML), XSLT, and WYSIWYG templates for content contributors.

- Deliver content to multiple devices (e.g., PDAs, mobile phones, WEB TV).

- Easily share XML content across B2B transactions.

- Advanced XML authoring: Ektron's highly-acclaimed XML editor—Ektron eWebEditPro+XML—lets developers hide XML tags from content contributors and provides an easy-to-use WYSIWYG editing interface.

XML configurations are used in Ektron CMS200/300 to define the necessary files to display, save, and validate the content properly.

This section explains how to take advantage of the XML capabilities of Ektron CMS200/300.

What's in This Chapter?

Here is what's covered in this chapter...

Before You Manage XML Configurations

The XML configuration section is where you are able to define each of the XML configurations that will be used in your Web site. Each XML configuration is assigned to a content folder or a content block, allowing you to specify how the XML content is displayed in the editor, validated, and displayed in the output device.

There are two ways to create XML configurations in Ektron CMS200/300.

- Using external XML files
- Using the WYSIWYG Data Designer

This section explains how to create and manage XML configurations which are assigned to content folders that contain XML content and specific XML content blocks using both methods.

The XML Configuration Toolbar

During the process of creating and managing XML configurations for your Web site, there will be several toolbar buttons that perform different tasks to make this process easier.

The following table describes all the buttons, and their tasks, that you will come into contact with while working with XML configurations.

Button	Name	Description	More Information
	Add XML Configuration	Used to create a new XML configuration or to create a new XML configuration based on the properties of an existing one.	"Adding a New XML Configuration" on page 98
	Back	Sends you to the previous page.	
	Configure Full Text Search	Allows you to index your XML configurations.	
	Delete	Used to delete an XML configuration.	"Deleting XML Configurations" on page 125
	Edit	Used to edit an XML configuration.	"Editing XML Configurations" on page 115
	Edit Data Design	Opens the Ektron CMS200/300 XSLT data designer page.	"Editing Data Design Package" on page 112
	Save	Standard save button.	
	Update	Standard save and update button.	
	View XSLT	Displays the XSLT for XML configurations that are created using the data designer.	"Viewing Data Designer XSLTs" on page 122

Accessing XML Configurations

To access the XML configuration section of the Administrator Workarea, perform the following steps:

1. Access your workarea as described in ”Accessing the Administrator Work Area” on page 20.

2. In the folder tree on the left side of the workarea, follow the path **Settings > Configuration > XML Configuration**.

   The "View XML Configurations" page is displayed.
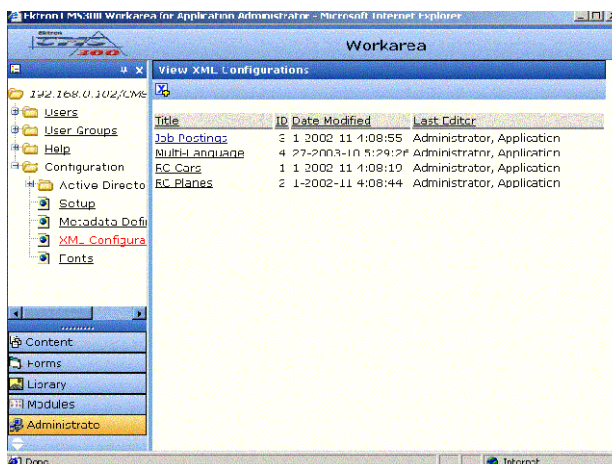
From the View XML Configurations page, you will be able to view, add, edit, and delete XML configurations.

Adding a New XML Configuration

Through the Ektron CMS200/300 administrator Workarea, you may create as many XML configurations as you would like.

There are two options when adding a new XML configuration:

- Using the WYSIWYG data designer (recommended)
- Using external XML files (for example, XSLTs, schemas, etc.)

The following sections explain how to add XML configurations using both methods.

Adding XML Configurations Using the Data Designer

To add an XML configuration using the WYSIWYG data designer, perform the following steps:

1. Access the XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the **Add XML Configuration** button( ) from the toolbar.

   The "Add XML Configuration" page is displayed.

3. Type in a title for the XML configuration.

4. Click on the **Save** button( ) from the toolbar.

   The XML configuration data designer page is displayed.
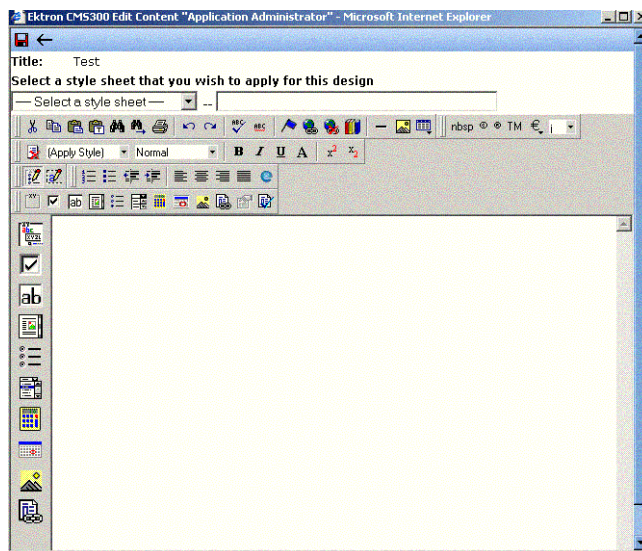
5. If desired, you may specify a style sheet to be applied to the editor either by typing in the path and file name of the CSS file, or by selecting a Ektron CMS200/300 registered CSS from the drop down list.

6. Design your XSLT in the data designer.

   See "Using the Data Designer" on page 219 for information about creating XSLTs using the data designer.

7. Click on the **Update** button(🖫) from the toolbar.

    The XML configuration page is displayed and the "View XML Configuration" page is displayed.

    Now, you are ready to assign the XML configuration to a content folder or content block. See "Assigning XML Configurations" on page 104 for more information.

Adding an XML Configuration Using External XML Files

To add an XML configuration using external XML files, perform the following steps:

1. Access the XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the **Add XML Configuration** button(🗷) from the toolbar.

    The "Add XML Configuration" page is displayed.

3. Type in a title for the XML configuration.

4. Click on the **Save** button(🖫) from the toolbar.

    The XML configuration data designer page is displayed.

5. Click on the **Back** arrow(←) to close the data designer page and access the external files configuration page.

   The "View XML Configuration" page for the new XML configuration is displayed.
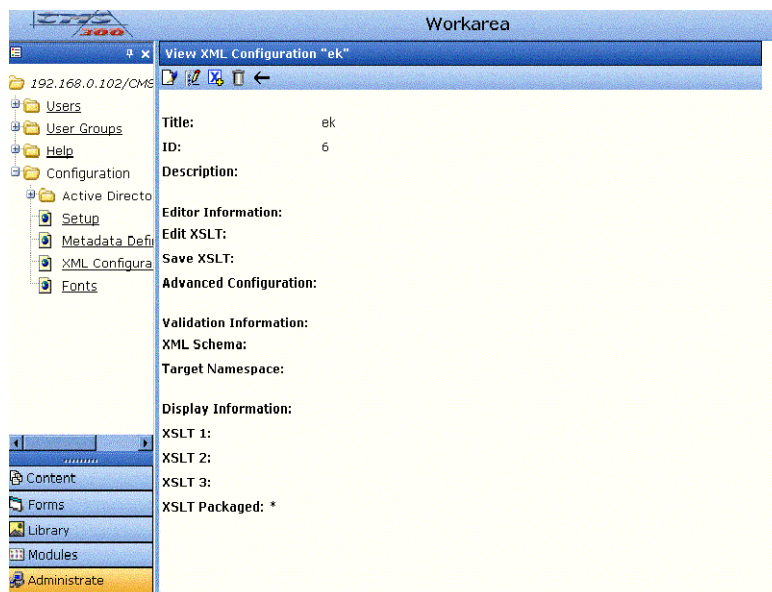
6. Click on the **Edit** button( ) from the toolbar.

   The "Edit XML Configuration" page is displayed.

7. Enter the necessary information into this page using the following table as a reference.

Section	Field	Description
Generic Information	Title	Name given to the XML configuration.
	ID	ID number assigned automatically by Ektron CMS200/300 upon creation of the configuration.
	Description	Detailed description given to the configuration by the creator or last editor.

Section	Field	Description
Editor Information	Edit XSLT	XSLT that is applied to the content when being editing in the editor.
	Save XSLT	XSLT used to transform the XML created in the editor when saved to the database.
	Advanced Configuration	XML file that contains display information, schema validation, and other advanced XML data.
Validation Information	XML Schema	Specify here the .xsd file that is used to validate the XML content that is created.
	Target Namespace	Specify the default namespace used for outgoing XML
DIsplay Information	XSLT1	XSLT 1 that is applied to the XML data when viewed on a device.
	XSLT2	XSLT 2 that is applied to the XML data when viewed on a device.
	XSLT3	XSLT 3 that is applied to the XML data when viewed on a device.
	XSLT Packaged	XSLT Package that is applied to the XML data when viewed on a device.

NOTE When an XML configuration is created using the data designer, a default display XSLT is also created which looks similar to the edit XSLT created in the editor. This default XSLT can be applied to the XML content.

8. Specify the default display XSLT for the configuration by clicking on the radio button next to the corresponding XSLT.

9. Click on the **Save** button(🖫) from the toolbar to save the changes.

The XML configuration is saved, and the "View XML Configurations" page is displayed with the updated changes.

XML File Verification

To the right of some of the editable fields on the "Add XML Configuration" page, a verification icon (⬜) is displayed.

Once you have entered the file name for the XSLT or Schema, you can click on this icon to verify that:

- The file exists in the location specified
- The file contains well-formed XML

The following table explains the possible results when clicking on the verification icon.

Display	Result	Description
☑	Verified	The file passes all verification parameters.
☒	Not Verified	The file either: • Does not exist in the location specified • Does not contain well-formed XML Review current settings, ensure file is in the proper location, be sure file contains well-formed XML.

NOTE   The XML Verification feature does not validate the contents of the XML file, it simply verifies that the file exists and that it is an XML file.

Assigning XML Configurations

XML configurations can be assigned to either a content block or a content folder. When assigned to a content folder, all content blocks that belong to that folder will use the XML configuration.

Where Can XML Configurations be Assigned?

There are three locations in Ektron CMS200/300 where an XML configuration can be assigned:

Location in Ektron CMS200/300	See Also
"Edit Folder Properties" page	"Folder Properties" on page 47
"Add Sub-folder" page	"Adding Sub-Folders" on page 53
"View Properties for the Content" page	"Content Properties" on page 79

In each of these locations, assigning an XML configuration is identical. An XML configuration can either be inherited by the parent folder, or a different one can be assigned.

DIsplayed here is the select XML configuration form that is displayed in all three locations.

XML Configuration:
☐ Inherit XML Configuration
―None ― HTML― ▾ 🔍

When assigning an XML configuration, you may choose one of the following options:

- Inherit the parent content folder's XML configuration
- Assign an existing XML configuration to the content block
- Assign no XML configuration, assume HTML

Each of these options is explained in the following sections.

Inheriting an XML Configuration

By default, all content blocks and content folder inherit their XML configuration settings from their parent folders.

To "break" or restore inheritance, you may toggle the option by placing a check, or removing the check from the box next to the text, "Inherit XML Configuration".

Setting	Result
Do Not Inherit	Content will not use the XML configuration assigned to the parent content folder.
	With inheritance is broken, a different XML configuration may be assigned to the content block.
	See "Assigning a Different XML Configuration" on page 105 for more information.
Inherit	Content will use the XML configuration that has been assigned to the parent content folder.

Assigning a Different XML Configuration

To assign an XML configuration, different than the one assigned to the parent content folder of a content block or content folder, perform the following steps:

1. Access the XML configuration setting form as described in "Where Can XML Configurations be Assigned?" on page 104.
2. If the "Inherit XML Configuration" box is checked off, remove the check by clicking on the box.

   See "Inheriting an XML Configuration" on page 105 for additional information.

3. Click on the down arrow in the drop down list to display all the XML configurations registered in the Ektron CMS200/300 Web site.

XML Configuration for this content:

☐ Inherit XML Configuration

--None -- HTML-- ▼ 🔍

--None -- HTML--
Job Postings
RC Cars
RC Planes
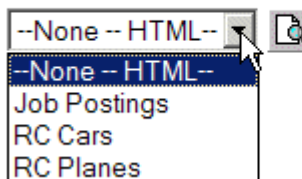
NOTE   See "Adding a New XML Configuration" on page 98 for more information about adding XML configurations.

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4. From the list, click on the XML configuration you would like to assign to the content block or content folder.

NOTE   Choosing the "None--HTML" option will tell Ektron CMS200/300 that the content is strictly HTML, and no XML Configuration will be assigned to it.

---

5. Once selected, click on the **Preview** button(🔍) next to the drop down box to view the XML configuration.

   A new window opens with the XML configuration displayed.

6. Click on the **(✖)** button from the toolbar to close the window.

   The XML Configuration window will close and you are taken back to Edit Properties window

7. Click on the **Update** button(💾) from the toolbar to save and update the changes.

   When assigning XML configuration to a sub-folder, click on the **Save** button(💾) from the toolbar to save the changes.

   The XML configuration is now assigned to the content folder or content block.

Viewing XML Configurations

Once you have accessed the View XML configurations page, you are able to view each of the current XML configurations.

To view an XML configuration:
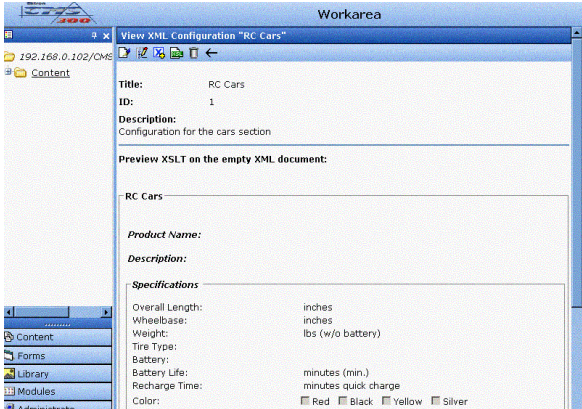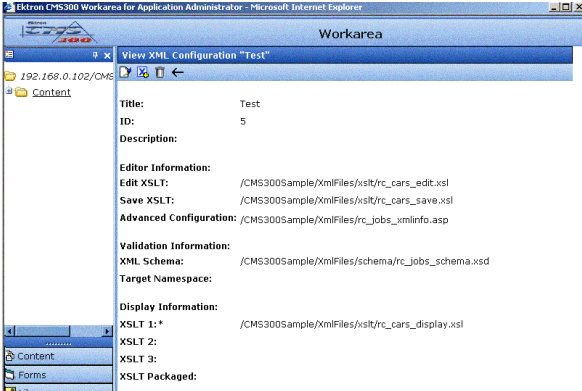
1. Access the view XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the title of the XML Configuration you would like to view.

The view XML Configuration page will be displayed with a more detailed description of the configuration.

XML Configuration Created with...	
Data Designer	**External Files**

The View XML Configuration page is divided into several major sections:

XML Configuration Created with...	
Data Designer	**External Files**
• "General Information" on page 110 • "Data Design Package" on page 110 • "Display Information" on page 111	• "General Information" on page 110 • "Editor Information" on page 111 • "Validation Information" on page 111 • "Display Information" on page 111

Each of the sections are explained below.

General Information

The general information about the XML configuration is used to reference the XML configuration by the users.

Field	Description
Title	Name given to the XML configuration.
ID	ID number assigned automatically by Ektron CMS200/300 upon creation of the configuration.
Description	Detailed description given to the configuration by the creator or last editor.

Data Design Package

The data design package displays the XSLT that is applied to the editor when an XML content block is created. This is the XSLT that was created for the XML configuration.

RC Planes

Product Name:

Description:

Specifications

Airfoil:
Overall Length:
Wingspan:
Weight:
Engine Size:
Fuel Tank Size:
Engine Run Time:
Refill Time:
Fuel Type:
Color:

Editor Information

The editor information contains the filenames of the XSLTs used when editing and adding content in the editor.

Field	Description
Edit XSLT	XSLT that is applied to the content when being edited in the editor.
	If no edit XSLT is specified, the Edit Data Design option is enabled in the toolbar.
Save XSLT	XSLT used to transform the XML created in the editor when saved to the database.
Advanced Configuration	XML file that contains display information, schema validation, and other advanced XML data.

Validation Information

Content that is created and edited with Ektron CMS200/300 may be validated with a schema if desired. The validation information contains information about the schema.

Field	Description
XML Schema	Specify here the .xsd file that is used to validate the XML content that the XML configuration will be assigned to.
Target Namespace	Specify the default namespace used for outgoing XML.

Display Information

The display information section displays the XSLTs that are used when displaying XML in the respective environment.

Field	Description
XSLT1	Display XSLT 1

Field	Description
XSLT2	Display XSLT 2
XSLT3	Display XSLT 3
XSLT Package	Display XSLT Package

NOTE When an XML configuration is created using the data designer, a default display XSLT is also created which looks similar to the edit XSLT created in the editor. This default XSLT can be applied to the XML content.

The asterisk denotes the default XSLT for the XML configuration.

Editing Data Design Packages

Editing Data Design Package

Once an XML configuration has been created using the data designer, the data package may be modified by an administrator.

Before You Edit the Data Package!

Before you edit the data package for an XML configuration, it is important to realize the effects of the modifications.

If the data package for an XML configuration is edited, then all content where the XML configuration is applied to will be updated as well. All information that was originally created will be lost, depending on the changes made to the data design package.

To ensure that information is not lost, use the "Create New XML Configuration Based on Existing XML Configuration" option on the view XML configuration page, see for more information.

Editing Data Design Package

To edit the data design package, perform the following steps.

1. Access the view XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the title of the XML Configuration you would like to view.

The view XML Configuration page will be displayed with a more

detailed description of the configuration
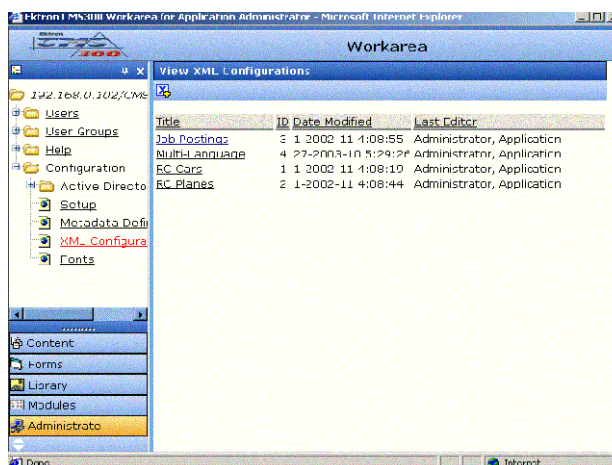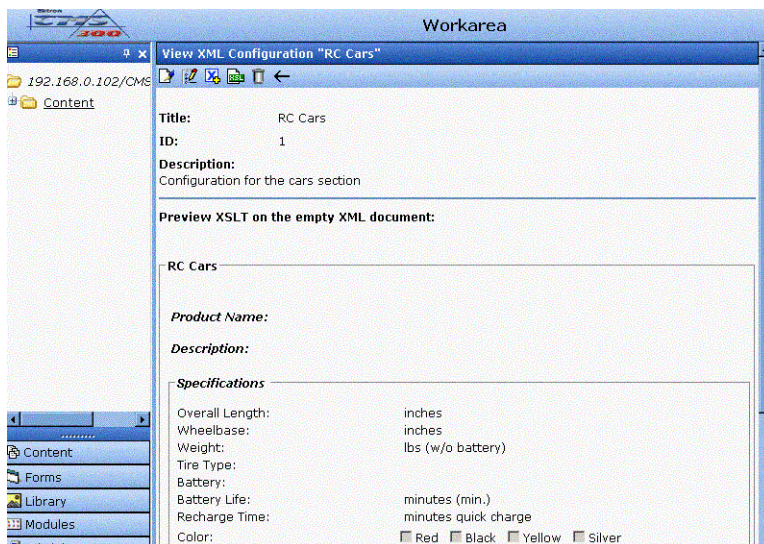
3. Click on the **Data Design Mode** button (📝) from the toolbar at the top of the page.

    The edit data design package page is displayed with the current package displayed in the editor.
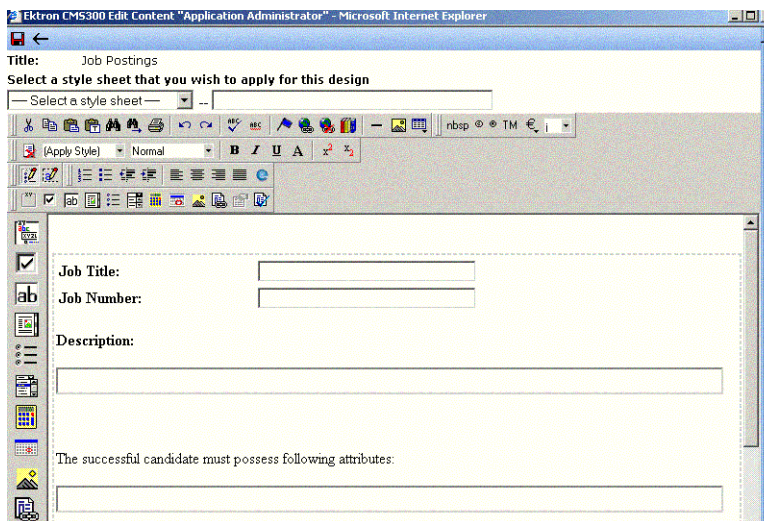
4. Make the necessary changes to the data design package in the editor.

    See "Using the Data Designer" on page 219 for information about creating XSLTs using the data designer.

5. Click on the **Update** button (🔲) from the toolbar to save and update the data design package.

The view XML configuration page is displayed with the changes reflected.

Editing XML Configurations

Once an XML configuration has been created, it can be modified when files defined in the configuration have changed.

To edit an XML configuration:

1. Access the View XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the title of the XML configuration you would like to edit.

The view XML configuration page is displayed.

XML Configuration Created with...

Data Designer	External Files

3. Click on the **Edit** button from the toolbar at the top of the page.

The edit XML configuration page is displayed.

XML Configuration Created with...

Data Designer	External Files

4. Edit the necessary fields to update the XML configuration.

5. Click on the **Update** button from the toolbar to save and update the changes.

The page will refresh, and the view XML configuration page is displayed with the updated changes.

Once the XML configuration has been edited, all content blocks and folders that use the XML configuration take on the properties set in the updated configuration.

XML File Verification

To the right of some of the editable fields on the Add XML Configuration page, the following icon is displayed.

Once you have entered the file name for the XSLT or Schema, you may click on this icon to verify that:

- The file exists in the location specified

- The file contains well-formed XML

The following table explains the possible results when clicking on the verification icon.

Display	Result	Description
	Verified	The file passes all verification parameters.
	Not Verified	The file either: • Does not exist in location specified • Does not contain well-formed XML Review current settings, ensure file is in the proper location, be sure file contains well-formed XML.

> **NOTE** The XML Verification feature does not validate the contents of the XML file, it simply verifies that the file exists and that it is an XML file.

Creating XML Configurations Based on Existing Configurations

Creating a new XML configuration based on an existing one allows you to create a copy of an XML configuration and make changes to the new one without causing any problems with content already controlled by the XML configuration.

Anytime major changes are to be made to an existing XML configuration, it is recommended that you create a copy of the XML configuration and perform the modifications to the new one.

To create a new XML configuration based on an existing one, perform the following steps:

1. Access the view XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the title of the XML Configuration you would like to view.

The view XML Configuration page will be displayed with a more

detailed description of the configuration

3. Click on the **Create New XML Configuration** button (🗴)

   from the toolbar to create a new XML configuration based on this XML Configuration.

   The Add XML configuration page is displayed.

4. Enter a title for the new XML configuration in the field provided,
    then click on the **Add XML Configuration** button ( ) in the
    toolbar at the top of the page.

    The view XML configuration page for the new XML
    configuration is displayed.

    From this page, you can perform the necessary actions to the
    XML configuration

Viewing Data Designer XSLTs

When an XML configuration is created using the data designer, an
XSLT is also produced to assist you with creating your display
XSLT. This XSLT includes the structure for your XML documents.

If a display XSLT is not applied to an XML configuration, then the
content will be displayed using the default XSLT that is displayed in
the View XSLT page.

To view the XSLT for an XML configuration, perform the following
steps:

1. Access the view XML Configurations page as described in "Accessing XML Configurations" on page 98.
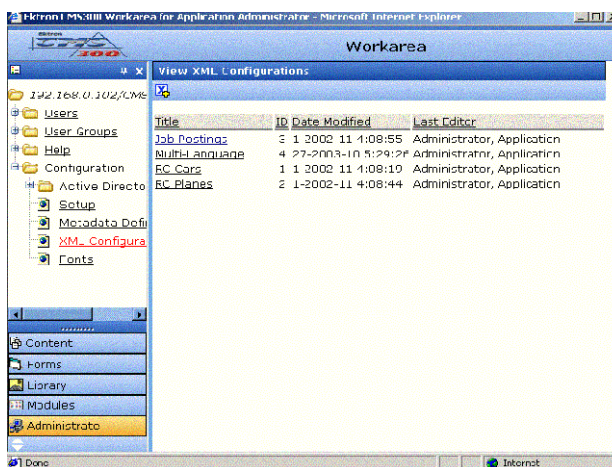
2. Click on the title of the XML Configuration you would like to view the XSLT of.

The view XML Configuration page will be displayed with a more detailed description of the configuration
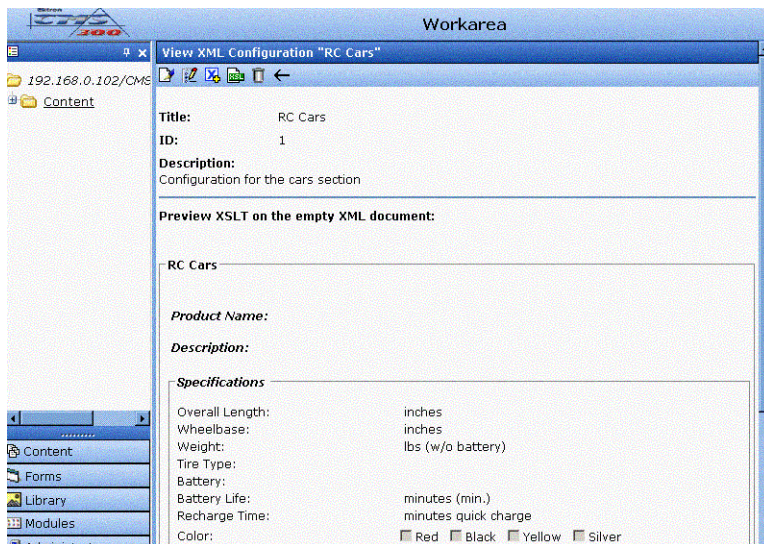
3. Click on the **View XSLT** button ( ) from the toolbar at the top of the page.

The View XSLT page is displayed.
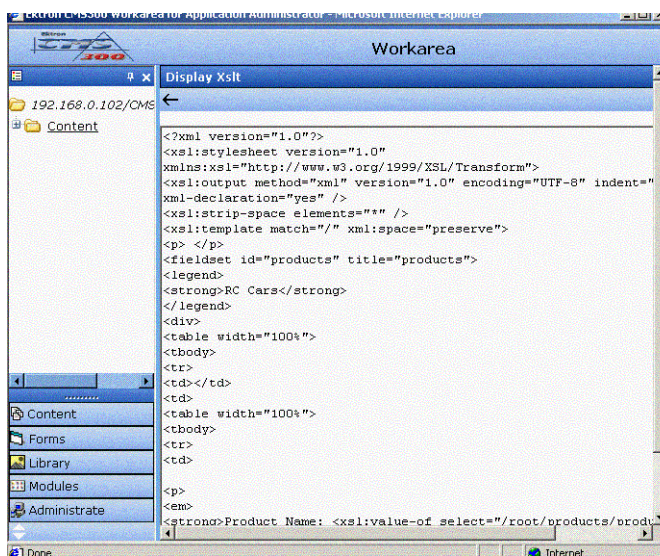
Now you can use this information to create your display XSLT.

Indexing XML Configurations

Once you have created an XML configuration using the data designer supplied with Ektron CMS200/300, you can then index the XML data package that is created.

Once you have indexed you XML configuration, visitors can then search through your XML data more effectively.

For more information about indexing your XML configurations, see .

Deleting XML Configurations

XML configuration that are no longer needed may be deleted from the Web site.

To delete an XML configuration:

1. Access the View XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the title of the XML configuration you would like to delete.

The view XML configuration page is displayed.

XML Configuration Created with...	
Data Designer	**External Files**

3. Click on the **Delete** button from the toolbar at the top of the page.

The following confirmation message is displayed.
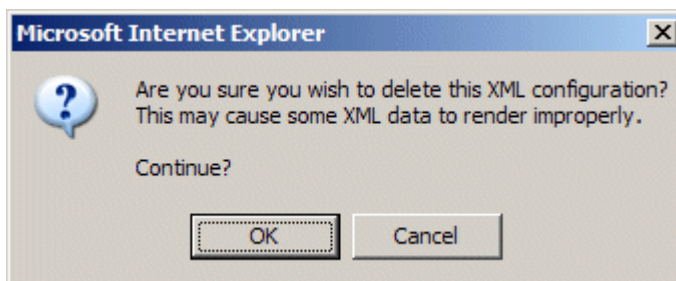
4. Click on the **OK** button to continue.

The page refreshes, and the updated XML Configuration table is displayed.

XML Indexing

Once you have created an XML configuration using the data designer supplied with Ektron CMS200/300, you can easily index your XML packages.

Indexing your XML configurations allows Web site visitors and Ektron CMS200/300 to easily and effectively search XML content stored in your Web site.

This section explains how to index your XML packages.

Before You Can Index

License Key

The XML indexing feature is only available with the purchase of a special license which enables the functionality within Ektron CMS200/300.

NOTE For additional information about purchasing a license key for XML indexing, please contact Ektron Sales.

For information about inserting your new license key into Ektron CMS200/300, see "Configuring Ektron CMS200/300" on page 21.

Enabling Indexing

Once you have added your new license key, you can then enable indexing in the Ektron CMS200/300 workarea.

To enable indexing, perform the following steps:

1. Insert your new license key into your Application Settings page as described in "Configuring Ektron CMS200/300" on page 21.

2. **Save** the application settings.

   The new license key is saved, and the application settings page is displayed.

3. Click on the **FT Search Configuration** option under the Configuration folder in the administrator workarea.
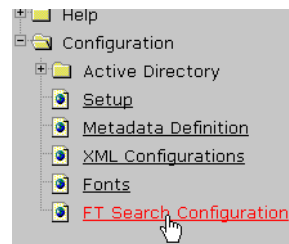
The Full Text Index Search configuration page is displayed.
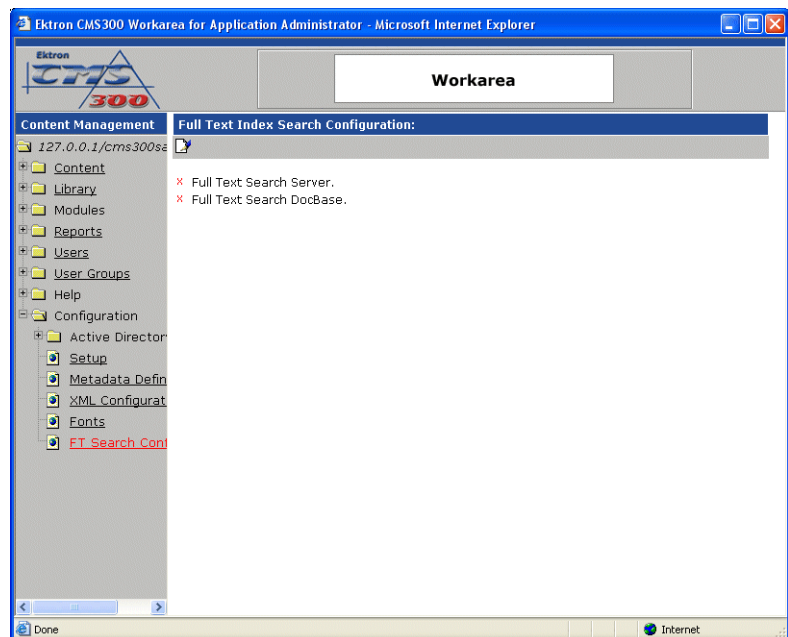
4. Click on the **Edit** button(⬚) from the toolbar.

    The edit Full Text Index Search configuration page is displayed.
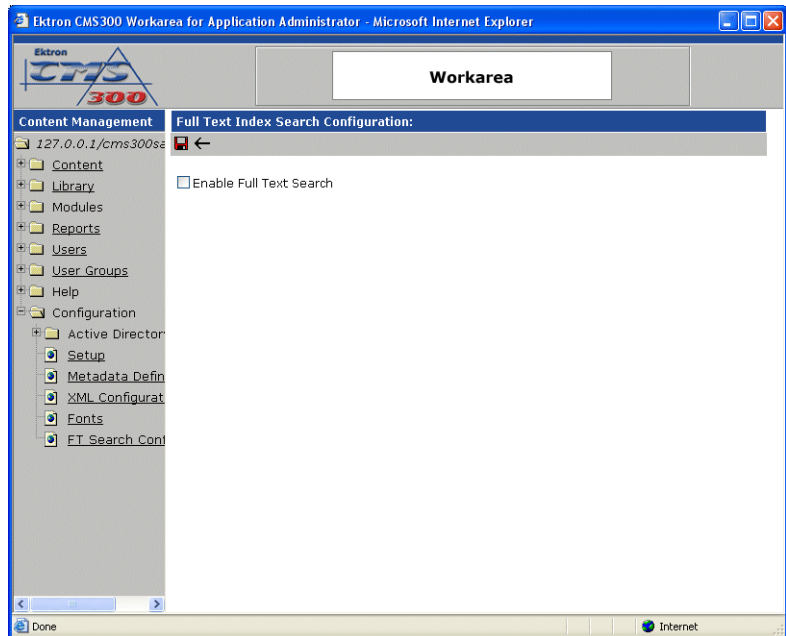
5. Check off the box to enable full text search.

6. Click on the **Update** button(🔲) from the toolbar to save the changes.

Ektron CMS200/300 goes through the process of enabling the Full Text Indexing Search feature. A confirmation message appears at the end displaying the results.
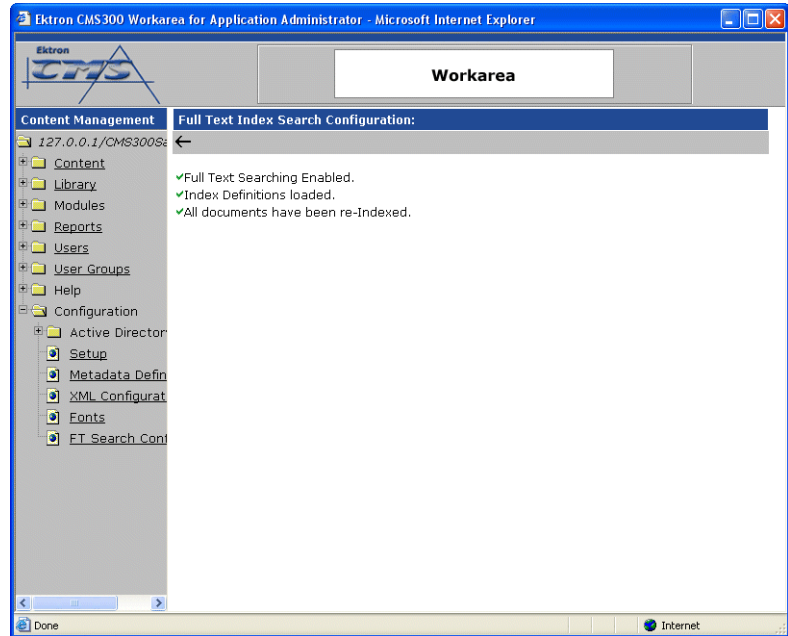
Creating XML Configurations

Once an XML configuration has been created using the data designer, it can then be indexed. When indexing, all elements that make up the XML document are displayed on the indexing page.

Displayed here is an XML configuration

RC Cars

Product Name:

Description:

Specifications

Overall Length:	inches
Wheelbase:	
Weight:	lbs (w/o battery)
Tire Type:	
Battery:	
Battery Life:	
Recharge Time:	
Color:	☐ Red ☐ Black ☐ Yellow ☐ Silver
MTBF:	
Date Manufactured:	

For additional information about creating an XML configuration using the data designer supplied with Ektron CMS200/300, see "Adding a New XML Configuration" on page 98.

Accessing Full Text Search Configuration

The configure Full Text Search page for an XML configuration created by the data designer is used to dynamically create the advanced search form displayed on your Web site.

To access the full text search configuration page for an XML configuration, perform the following steps.
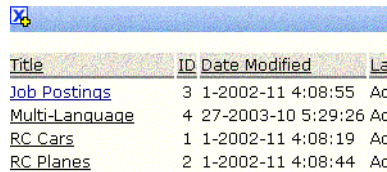
1. Access the XML Configurations section of your Workarea.

The view XML configurations page is displayed.

2. Click on the title of an XML configuration that you would like to index.

The view XML configuration page for the selected XML configuration is displayed.

3. Click on the **Edit Full Text Search** button(![icon]) from the toolbar.

   The Configure Full Text Search page is displayed with all elements listed.
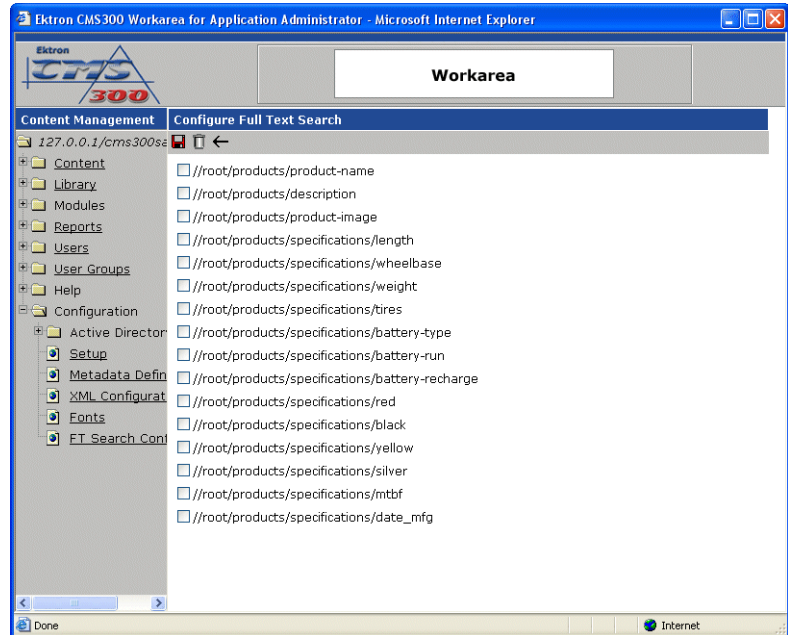
From here, you can configure your full text search settings. See "Indexing XML Configurations" on page 135 for additional information.

Indexing XML Configurations

The following section explains how to index an XML configuration.

Selecting Elements to Index

Each element of an XML configuration created with the data designer can be indexed.

To select an element to index, perform the following steps:

1. Access the Configure Full Text Search page for the XML configuration that you would like to configure.
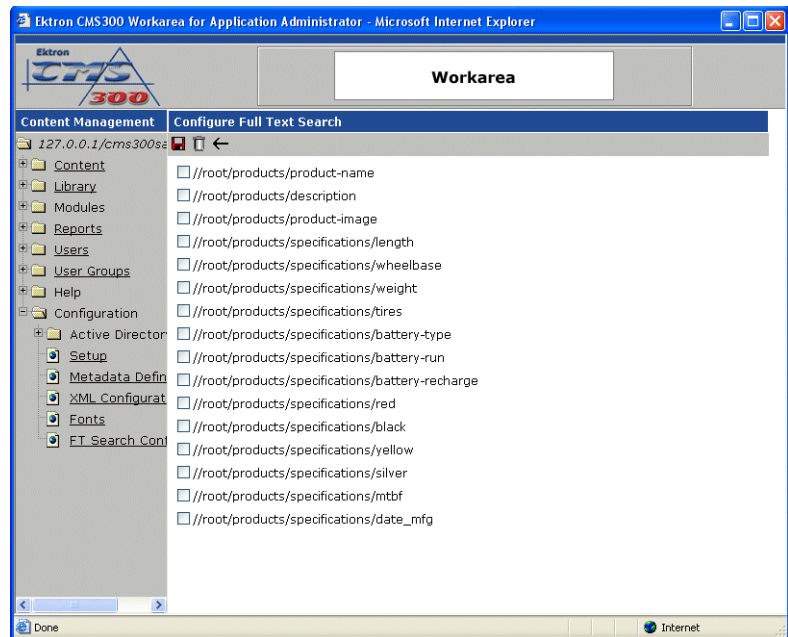
2. Check off the box next to the element that you would like to index.

    When selected, several options are listed below the element.
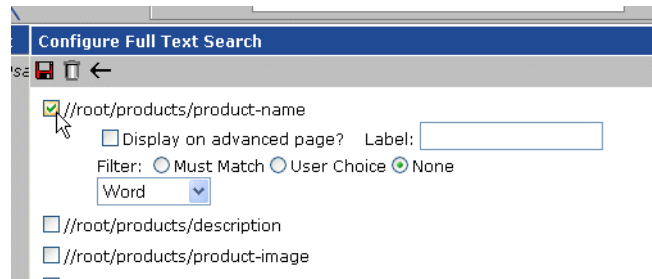
The following table explains each of the configurable options.

Attribute	Description	More Information
Display on Advanced Page?	When checked, the indexed element will be dynamically displayed on the advanced search page.	"Display on Advanced Page" on page 137
Label	If displayed on the advanced search page, the label is displayed for the advanced search option.	"Label" on page 137

Attribute	Description	More Information
Filter	Set the filter settings for the search option.	"Filter" on page 137
Data Type	Specify what kind of data the element is, as well as data type options.	"Data Type" on page 137

Display on Advanced Page

When checked off, this index element will be displayed on the full text advanced search page.

If the element is indexed, and not displayed on the advanced search page, then users cannot search by the element.

Label

If the indexed element is specified to be displayed on the advanced search page, then the label is assigned to it.

Filter

To narrow down the search results that are displayed when an advanced search is performed, filter settings may be applied to the indexed element.
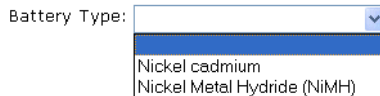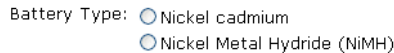
There are three methods for filtering search results.

Filter Setting	Description
Must Match	Forces search results to be filtered by search criteria entered by user.
User Choice	Users can determine whether the search results will be filtered by the criteria specified.
None	Search results will not be filtered.

Data Type

The data type drop down list allows you to select the kind of data that the element stores. There are five different data types that can be used, and each data type has their own options.

The following table describes each of the data types.

Data Type	Description
Word	Displays plain text box on advanced search page.
Choices	Allows the user choices on the advanced search page for the element.
	Choices are automatically inserted according to the data stored in the element's XML tags.
	Additional options include:
	• **Drop down list**
	• **Radio buttons**
Integer	Displays a text box on the advanced search page that accepts integers.
	Note: Integers are whole number (for example, 0, 1, -300, 163927)
	High and low limits are automatically generated depending on the XML data stored within the element's tags.
	Integer options include:
	• **From To** - *allows user to specify a range of integers to search. Search only displays results that are between the two integers specified.*
	• **Greater Than** - *search only displays results that are greater than the integer specified.*
	• **Less Than** - *search only displays results that are less than the integer specified.*

Data Type	Description
Decimal	Displays a text box on the advanced search page that accepts decimals.
	Note: Decimals can be integers or "floating-point" numbers which are numbers that contain a fractional part. (for example, 1.5, -1.3333333, etc.)
	High and low limits are automatically generated depending on the XML data stored within the element's tags.
	Decimal options include:
	• **From To** - allows user to specify a range of decimals to search. Search only displays results that are between the two decimals specified.
	• **Greater Than** - search only displays results that are greater than the decimals specified.
	• **Less Than** - search only displays results that are less than the decimal specified.
Date	Displays a text box and a calendar button on the advanced search page that allows you to search by date.
	High and low limits are automatically generated depending on the XML data stored within the element's tags.
	Calendar options include:
	• **From To** - allows user to specify a date range to search. Search only displays results that are between the two dates specified.
	• **Greater Than** - search only displays results that are greater than, or after, the date specified.
	• **Less Than** - search only displays results that are less than, or before, the date specified.

What's Next?

After indexing your XML configurations, or at least the ones that you want to, your developer can modify your Web site templates to accommodate the XML indexing search capabilities. For additional information about inserting an XML basic and advanced search form on your Web site templates, see the Ektron CMS200/300 *Developer Manual.*

Indexed XML Basic & Advanced Search

After your XML configurations are indexed, and the necessary code has been inserted into your Web site templates by your Web site developer, you can begin searching through your indexed XML.

This section explains the indexed XML basic & advanced search forms.

Search Operators and Wildcards

When performing searches using the indexed XML basic and advanced search forms, you can use several search operators and wildcards to narrow your search results. These operators and wildcards can only be used in the basic search text box or for word data on an advanced search page.

This section explains the available search operators and wildcards

NOTE A list of search operators and wildcards can be viewed by clicking on the "Help" hyperlink on the search pages.

Search Operators

The following table explains search operators you may use when querying XML data.

Symbol	Symbol Description	Priority	Example	This query retrieves all documents that contain...
|	Or	1	Cats | Dogs	the word "Cats" or the word "dogs".
+	And	2	Cats + Dogs	the word "Cats" and the word "dogs".
-	Without	3	Cats - Dogs	the word "Cats" without the word "dogs".
UNIT=""	Advanced and	4	Cats UNIT="paragraph" dogs	the word "Cats" and the word "dogs" in a same paragraph.

Symbol	Symbol Description	Priority	Example	This query retrieves all documents that contain...
ADJ	Adjacency	5	Cats ADJ4 dogs	the word "Cats" placed within 4 words of the word "dogs" in this order.
NEAR	Near	6	Cats NEAR6 dogs	the word "Cats" placed within 6 words of the word "dogs"
>	Frequency	7	Cats >6	the word "Cats" 6 times or more.
( )	Priority	8	(Cats + Dogs) - mouse	the words "Cats" and "dogs" without the word "mouse

Wildcards

The following table explains the wildcards that may be used when performing a search.

Symbol	Symbol Description	Example	This query retrieves all documents that contain...
?	Replaces one character	H?t	words like "Hat" or "Hot" or "Hit" or "Hut"
*	Replaces a group of characters	B*y	words starting with the letter "B" and ending with the letter "y".
[ ]	Defines a choice	Chat [,ting]	the words Chat or Chatting.

Basic XML Search

The basic XML search form searches all indexed XML configurations in your Web site without providing any options to filter the search results. It displays a text box, search button, and help hyperlink. Here is an example of the basic search form on a Web page.

Full Text Search   Help

Although this is a basic search box, using specific search operators and wildcards, you can easily filter the search results. See "Search Operators and Wildcards" on page 140 for additional information.

Advanced XML Search

The advanced XML search page contains options you specified when indexing your XML configurations.

Sample Advanced Search Page

Here is an example of an advanced search page:

The following explains this search page's options.

Car Description

Web Site Display

XML Index Settings

☑ //root/products/description
  ☑ Display on advanced page?   Label: Car Description:
  Filter: ○ Must Match ⦿ User Choice ○ None
  Word

Length in Inches

Web Site Display

	From: 11	To: 20
Length in inches:		

XML Index Settings

☑ //root/products/specifications/length
  ☑ Display on advanced page?   Label: Length in inches:
  Filter: ○ Must Match ○ User Choice ⦿ None
  Integer   From To

Weight in lbs

Web Site Display

	Less Than: 5.00
Weight in lbs:	

XML Index Settings

☑ //root/products/specifications/weight
  ☑ Display on advanced page?   Label: Weight in lbs:
  Filter: ○ Must Match ○ User Choice ⦿ None
  Decimal   Less Than

Battery Type

Web Site Display

Battery Type: [▼]

XML Index Settings

☑ //root/products/specifications/battery-type
   ☑ Display on advanced page?   Label: [Battery Type:]
   Filter: ○ Must Match ○ User Choice ◉ None
   [Choices   ▼]   [Dropdown ▼]

Date Manufactured

Web Site Display

Date Manufactured: [▦]   [▦]

XML Index Settings

☑ //root/products/specifications/date_mfg
   ☑ Display on advanced page?   Label: [Date Manufactured:]
   Filter: ○ Must Match ○ User Choice ◉ None
   [Date   ▼]   [From To   ▼]   [mm/dd/yyyy ▼]

Managing Library Assets

Before users are able to add images and files to their content, the images and files will need to be uploaded first. Each user, depending on their permissions, will be able to upload images and files through the Library in their workareas.

As an administrator, you determine the types of files that are capable of being uploaded by the users, and permissions that each user has in the library.

When a new folder is created in the Content Manager, and permissions are given to it, a new folder is created in the Library, and the Library-related permissions (for example, Add Images, Add Files, etc.) are carried over as well.

What's In This Chapter?

The following topics are covered in this chapter:

Accessing The Library

To access the library, perform the following steps:

1. Access your Workarea.

2. Click on the **Library folder** in the Workarea folder tree

   The contents of the root library folder are displayed in the main section of the workarea.
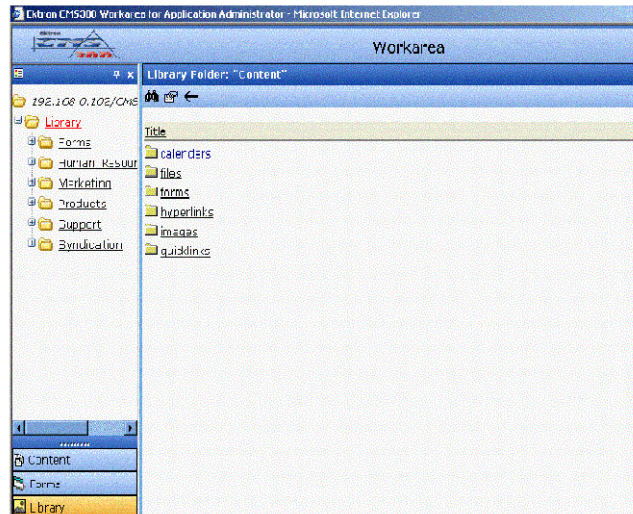
As an administrator, you will have the ability to edit the uploadable image and file extensions for each of the library folders, as well as make changes to where and how the images are uploaded to the server's file system.

When you arrive to this window, you will see a list of the folders that make up the main library folder.

Also, there is a properties button in the toolbar at the top of the page to allow you to configure the library, as well as a search button to search for library assets.

Library Permissions

Keep in mind that items added to specific folders will only be accessible by users with permissions to the respective content folder. If items are added to the image, file, hyperlink, and quicklink folders directly under the main Library folder, then all users with at least Library Read Only permissions will be able to access the library, and use the contents in their content block.

If an image is uploaded to a folder that only one person has permissions to, then that user will be the only user who will be able to access and use that image. The same is for files, hyperlinks, and quicklinks.
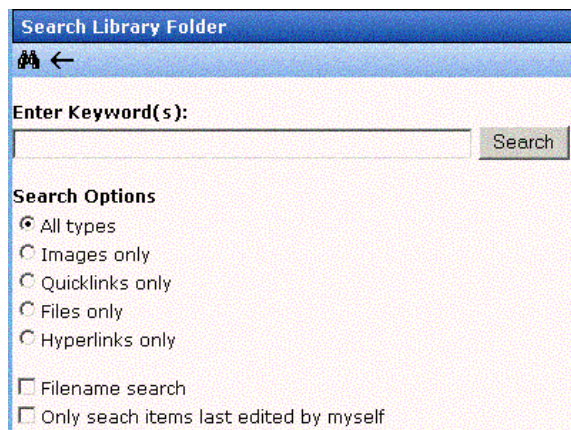
Searching Library Assets

To make the process of locating library assets within your Web site, you can execute an internal library search using the library folder in the workarea or though the eWebEditPro editor library.

To search the library assets via Library folder, perform the following steps:

1. Access any library folder in the Workarea as described in "Accessing The Library" on page 145.

2. Click on the **Search** button(🔍) from the library toolbar.

   The "Search Library Folder" page is displayed.

   ```
   Search Library Folder
   🔍 ←

   Enter Keyword(s):
   [                                    ]  [ Search ]

   Search Options
   ⦿ All types
   ○ Images only
   ○ Quicklinks only
   ○ Files only
   ○ Hyperlinks only

   ☐ Filename search
   ☐ Only seach items last edited by myself
   ```

3. Use the following table to customize your library search.

Field	Description
Keywords	Specify the keywords that the search will use.
All Types	The search will include all library asset types.
Images only	The search will only search images.

Field	Description
Quicklinks Only	The search will only search quicklinks.
Files Only	The search will only search files.
Hyperlinks Only	The search will only search hyperlinks.
Filename Search	When checked off, this option searches for file names, not library asset titles. In other words it is an extension on the file search. (useful for searching by image filename, not title given to image).
Only search items last edited by myself	The search results will only display library assets that were last modified by you.

4. Click on the **Search** button(🔍) from the library toolbar or click on the search button next to the enter keywords text field.

   Either way, search will execute according to the parameters you have set, and all items that match the criteria are displayed on the search results page.

5. Click on the title link to view the properties of the returned item.

Searching Library Assets via eWebEditPro Library

To search the library assets via editor library, perform the following steps:

1. In your Workarea, browse to the content block under which you want to do a search on the library assets.

   For more information on how to access a content block, refer to the chapter on "Managing Content"

NOTE   When selecting the content block to do a search on, keep in mind the permissions that are set on it, and which users will have permissions to view the library.

2. Click on the **Add Content** button( ) from the toolbar.

   The "Add Content" window opens.

3. Click on the library icon from the editor toolbar.
4. The Library window is displayed.

5. Click on the **Search** button(🔍) from the library toolbar.

    The "Search Library Folder" page is displayed.

6. Use the following table to customize your library search.

Field	Description
Keywords	Specify the keywords that the search will use.
All Types	The search will include all library asset types.
Images only	The search will only search images.
Quicklinks Only	The search will only search quicklinks.
Files Only	The search will only search files.
Hyperlinks Only	The search will only search hyperlinks.
Filename Search	When checked off, this option searches for file names, not library asset titles. In other words it is an extension on the file search. (useful for searching by image filename, not title given to image).
Only search items last edited by myself	The search results will only display library assets that were last modified by you.

7. Click on the **Search** button(🔍) from the library toolbar or click on the search button next to the enter keywords text field.

    Either way, search will execute according to the parameters you have set, and all items that match the criteria are displayed on the search results page.

8. Click on the title link to view the properties of the returned item

Folder Properties

The library folder properties contains library related information including load balance settings, image and file types that are allowed to be uploaded, as well as other settings.

As an administrator, you have the proper permissions to make changes to the library properties.

Accessing the Library Properties Page

To view the properties of the library folder, perform the following steps:

1. Access any library folder in the Ektron CMS200/300 Workarea.

2. Click on the **Properties** button(🖺) from the library toolbar.

    The "Library Management" page is displayed. The library properties page displays the following settings.

Field	Description
Image Extensions	Extensions of images that are allowed to be uploaded to the library.
Image Upload Path	Location on the server where the images have been uploaded to.
Physical Path	The physical path on the file server where uploaded images will be stored.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you will need to setup that folder on the file server.
File Extensions	Extensions of files that are allowed to be uploaded to the library.

Field	Description
File Upload Path	Location on the server where the files have been uploaded to.
Physical Path	The physical path on the file server where uploaded files will be stored.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you will need to setup that folder on the file server.

Editing Folder Settings

As stated earlier, you can edit the types of extensions that the content contributors will be able to upload, as well as the Image and File upload paths.

To edit the current library settings, perform the following steps:

1. Begin by navigating to the library management page as described in .

2. Click on the **Edit** button( ) from the library toolbar.

   The "Library Management" page is displayed.

3. Use the following table to assist you with editing the settings, edit each of options.

Field	Description
Image Extensions	When you edit the Image extensions, you are limiting the types of images that the content contributors can upload to the library. You may add as many image file extensions you would like, or have none. If you have no image file extensions listed, then no one will be able to upload images to the specified folder.
Image Upload Directory	The Image Upload Directory specifies where the uploaded images will be saved to on the Web server. By default, the image upload directory is **uploadedimages/** relative to the Web site /CMS200/300Sample. You can specify a new folder to upload the images to if you would like.
File Extensions	When you edit the file extensions, you are limiting the types of files that the content contributors can upload to the library folder. You may add as many file extensions you would like, or have none. If you have no file extensions listed, then no user will be able to upload files to the specified folder.

Field	Description
File Upload Directory	The file Upload Directory specifies where the uploaded files will be saved to on the Web server. By default, the image upload directory is **uploadedfiles/** relative to the Web site /CMS200/300Sample. You can specify a new folder to upload the files to if you would like.

4. Click on the **Update** button(🖫) save the settings.

Load Balancing

This section explains how to create load balancing paths in Ektron CMS200/300. For further information about the steps needed to setup load balancing outside of Ektron CMS200/300, see "Load Balancing" on page 454.

Definition

Load balance is used for two important reasons:

1. Provides the redundancy for the Web site - if one server fails, then a second server will handle all requests.
2. Balances requests to the server - distributes the load request across two or more machines.

In both cases, the client (browser) is not aware that there may be several servers involved. All URLs will point to a single Web site, how these URLs get resolved is ultimately up to the load balance software.

Load Balancing and Ektron CMS200/300

In the case of Ektron CMS200/300, the application does not need to be aware that any load balancing is taking place. However, the file/image assets on all servers must be identical. Therefore, when a user uploads a new file/image to the Ektron CMS200/300 library, that file/image must be replicated on all other servers that are involved in your load balancing model. To achieve this, Ektron CMS200/300 will not only upload the assets to default upload directory, but will also upload the file/image to any other folder that has been defined in the library.

Ektron CMS200/300 provides any defined administrator an interface for adding load balance folders to the application. These folders will need to be either a virtual or physical folder under the Ektron CMS200/300 Web site. In most cases, this will be a virtual folder which points to a mounted hard drive (another server).

NOTE   Refer to "Load Balancing" on page 454 for advanced information about this feature.

Accessing Library Load Balancing Page

To access the load balancing section in the library, perform the following steps:

1. Begin by accessing the library folder properties page as described in "Folder Properties" on page 151.

2. Click on **View Load Balance Settings** button( ).

    The "View Library Load Balance Settings" page is displayed.

    The table is divided into five columns. Refer to the following table for a description of each column.
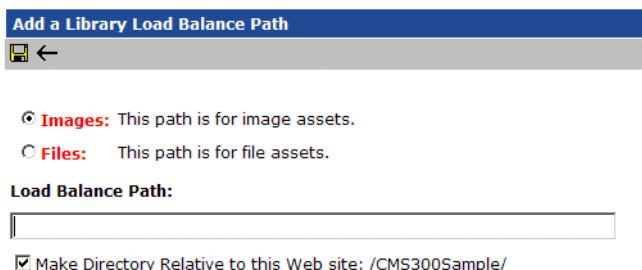
Column Title	Description
Web Path	The path of the folder under your server's Web site.
Type	• Images - load balance folder for uploaded images. • Files - load balance folder for uploaded files.
Relative	An "x" is used to define if the folder is relative to your Ektron CMS200/300 Web site.
Verified	If the load balance folder exists in the proper location, a green check is used to verify that the folder exists. A red x is displayed when the folder does not exist in the specified location.
Physical Path	Displays the physical location of the folder that the assets will be uploaded to.

Adding a New Load Balancing Folder

To add a new load balancing folder in the Ektron CMS200/300 library, perform the following steps:

1. Begin by accessing the view load balance settings page as described in .

2. Click on the **Add** button( ) on View Library Load Balance Settings page.

   The "Add a Library Load Balancing Path" page is displayed.

3. Use the following table to assist you with filling out the form.

Field	Description
Images/Files	Specify if the load balance path folder will be for images or files.
Load Balance Path	Enter the path of the folder.
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS200/300 site root, check off the box to make the path relative to that. Otherwise, remove the check if the path is not relative to the site path.

4. Click on the **Save** button( ).

   The page is refreshed, and the "View Library Load Balance Settings" page is displayed with the changes reflected.

Editing a Library Load Balance Path

If the Web path for a load balance folder has changed, you may edit it at any time.

To edit a load balance path, perform the following steps:

1. Begin by accessing the View Library Load Balance Settings page as described in "Accessing Library Load Balancing Page" on page 154.

2. Click on the Web Path of the load balance path you would like to edit.

   The "Edit Library Load Balancing Path" is displayed.

3. Make the necessary changes to the load balance path.

4. Click on the **Update** button(🔚) to save your changes.

   The page is refreshed, and the "View Library Load Balance Settings" page is displayed with the changes reflected.

Deleting a Library Load Balance Path

Library load balance paths that are no longer needed may easily be deleted.

To delete a library load balance path, perform the following steps:

1. Begin by accessing the View Library Load Balance Settings page as described in "Accessing Library Load Balancing Page" on page 154.

2. Click on the **Remove** (▭) button on the toolbar at the top of the page.

   The "Remove Library Load Balance Path" is displayed.

3. Check off the box(es) of the load balance paths you would like to delete.

4. Click on the **Remove** button(▭) to delete the load balance path.

   A confirmation message is displayed.

5. Click **OK.**

   The page is refreshed, and the "View Library Load Balance Settings" page is displayed with the changes reflected.

If You Have an Ektron WebImageFX License Key...

If you have also purchased and inserted an Ektron WebImageFX license key into Ektron CMS200/300, the images folder will be enhanced automatically.

Since Ektron WebImageFX has a built-in thumbnail creator for images, each uploaded image in the library also has a thumbnail created for it allowing you to locate uploaded images faster and easier.

Displayed here is an example of the images folder for an Ektron CMS200/300 Web site with an Ektron WebImageFX license key.
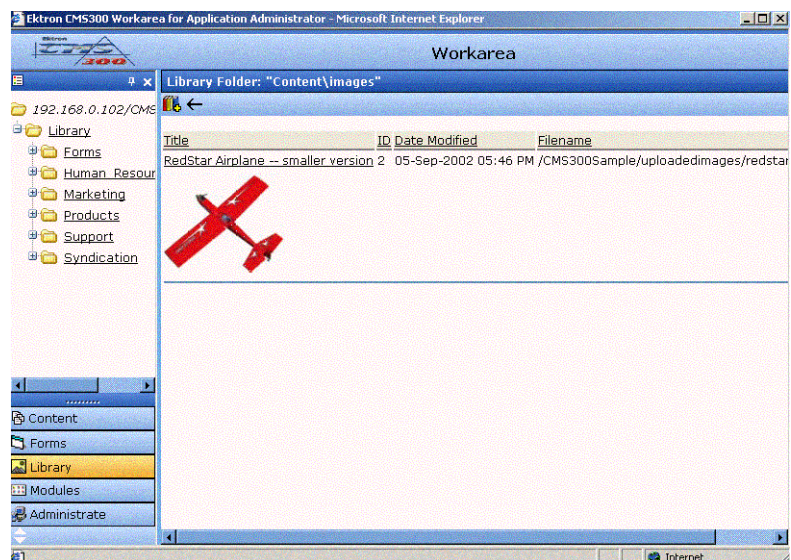
NOTE	For information about acquiring an Ektron WebImageFX license key for Ektron CMS200/300, contact the Ektron Sales Department.

Managing Images, Files, Hyperlinks, & Quicklinks

The Ektron CMS200/300 library is made up of images, files, hyperlinks, and quicklinks that have been added by Ektron CMS200/300 users.

The following table displays the actions that can be performed for each library asset type:

Action	Files	Images	Hyperlinks	Quicklinks
Add	✓	✓	✓	✓
Edit	✓	✓	✓	✓
View	✓	✓	✓	✓
Overwrite	✓	✓		
Delete	✓	✓	✓	✓
Remove From Server	✓	✓		
Check Links	✓	✓	✓	✓
Update URL				✓

The following sections explain how to perform the actions mentioned above to all library assets.

Uploading and Adding Library Assets

To add a library asset to the Ektron CMS200/300 Web site, perform the following steps:

1. In the administrator Workarea, browse through the library folders until you find a folder you would like to upload a file to.

NOTE Remember! When you upload or add a library asset to a specific folder, only users with permissions to that folder will be able to use that asset in their content blocks.

Six sub-folders in the main section of the Workarea are displayed.

2. Click on the folder that pertains to the type of asset you would like to add.

   The contents of the selected folder are displayed.

3. Click on the **Add Library Item** button( ).

   The "Add Library Item" screen is displayed.

4. Enter the necessary information for the asset you would like to add.

5. Click on the **Save** button( ) to save your changes.

   The library asset is saved and added to the Ektron CMS200/ 300 library.

When that is complete, users with permissions to that specific folder will be able to insert the asset to their content.

Viewing Library Assets

Once a library asset has been added to the Ektron CMS200/300 library, you may view it.

To preview a library asset, perform the following steps:

1. In the library folder, navigate to the library folder that contains the asset you wish to view.

   Six sub-folders in the main section of the Workarea are displayed.

2. Click on the folder that pertains to the type of asset you would like to view.

   The contents of the selected folder are displayed.

3. Click on the **title** of the asset you would like to preview.

   The "View Library Item" page is displayed.

Editing Library Assets

If desired, you may edit any library asset.

To edit a library asset, perform the following steps:

1. Access the "View Library Item" page for the asset you would like to edit as described in "Viewing Library Assets" on page 159.

2. Click on the **Edit** button(🖉) to edit the library asset.

   The "Edit Library Item" page is displayed.

3. Make the necessary changes to the library asset.

4. Click on the **Update** button(💾) to save your changes/

   The changes are saved and updated.

Library Link Checking

When you view the properties page for any library asset, regardless of the type, there is a button on the toolbar that is used to display a list of all the content blocks that currently use the asset within the content.

Performing this simple link checking option is useful when you want to delete the library asset from your Web site. With the click of a button, a list of content blocks is displayed that you need to update to reflect the change you will be making to the library asset.

Performing a Library Asset Link Check

To perform a library asset link check, perform the following steps:

1. Access the "View Library Item" for any type of library asset as described in "Viewing Library Assets" on page 159.

2. Click on the **Check Links** button(🖧).

   A search is performed, and a list of all content blocks that reference the library asset is displayed.

Overwriting Images and Files

NOTE Overwriting can only be performed on images or files.

When an image or file in the Ektron CMS200/300 library becomes out of date, or perhaps the wrong version of a file was uploaded, you may overwrite that file with a new or correct version.

Overwriting images and files allows you to minimize the disk space on your server, as well as keep the list of uploaded files in the library to a minimum.

Before You Overwrite an Image...

When overwriting an image, the new image uses the same size dimensions and file extension of the older image. Be sure that the two image are of the same file extension and size **OR** make the adjustments at each occurrence of the image.

Before You Overwrite a File...

Remember, all links that are pointed to the overwritten file will now point to the new file.

Overwriting Images and FIles

To overwrite an image or file, perform the following steps:

1. Access the "View Library Item" page for the asset you would like to overwrite as described in "Viewing Library Assets" on page 159.

2. Click on the **Overwrite** button(![overwrite icon]).

   The "Overwrite Library Item" page is displayed.

3. Click on the **Browse** button(Browse...) to select the path for the image/file.

   The "Choose File" window opens.

4. Locate the image or file you wish to overwrite the existing one with. Click on the file, and then click **Open**.

   The choose file window closes and "Overwrite Library Item" page is displayed with the path to the new file populated in the text field.

5. If desired, click on the **Preview** button(![preview icon]) to preview the file specified in the text field.

6. Click on the **Update** button(![update icon]) to save your changes.

   A confirmation message is displayed.

---

7. Click **OK**.

   The new file overwrites the previous file, and you will be taken back to the view library item page with the changes reflected.

Deleting Library Assets

Files that are no longer needed or used may be deleted from the Ektron CMS200/300 library.

By deleting a file, you can prevent users from adding the file to their content. However, deleting a file from the library does not delete the file from your Web server so links won't be broken.

To delete a file from the Ektron CMS200/300 library, perform the following steps:

1. Access the "View Library Item" page for the asset you would like to delete as described in "Viewing Library Assets" on page 159.

2. Click on the **Delete** button(🗑) to delete the library item.

   The "Delete Library Item" page is displayed.

3. If you are deleting a file or image, you have the option to remove the file from the server. If desired, check off the box next to "Remove the file from the server"

If...	Then...
You **remove** the file from the server	• All occurrences of the file in content blocks will be broken links • Users will no longer be allowed to enter the file into their content.
You **do not remove** the file from the server	• Users will no longer be allowed to add the file into their content • All occurrences of the file in content blocks will still work.

4. Click on the **Delete** button(🗑) to delete the library item.

    The page is refreshed and the library asset table is displayed with the changes reflected.

Adding a Library Asset to Your Content

As stated earlier, once a library asset has been added to the Ektron CMS200/300 library, users are able to add that asset to their content blocks.

To add a library asset to a content block, perform the following steps:

1. Invoke the editor by adding or editing a content block in Ektron CMS200/300.

2. Click on the **Library** icon(📚) from the editor toolbar.

    The editor library opens in a new window.

3. Navigate through the library folder in the top left section of the editor library until you find the folder that contains the library asset you would like to insert.

4. In the right frame, click on the sub-folder for the type of asset you would like to insert.

    The contents of the folder are displayed.

5. Click on the **Title** of the asset to be inserted.

    The selected asset is highlighted.

6. Click on the **Insert** button(📥) in the editor library window.

    The library window closes and the asset is inserted into the content.

Updating Default Template for Multiple Quicklinks

NOTE   This action can only be performed on Quicklinks.

When a content block is moved in Ektron CMS200/300, its quicklink does not get changed. However, it does get moved to the proper library folder. Once it has been moved, you can update the default template called in the content block's quicklink.

To update the default template for one or many quicklinks, perform the following steps:

1. Access the quicklinks folder in the Library that contains the quicklinks that you would like to update.

2. Click on the **Update Quicklinks** button( ).

   The "Update URL Link Template "quicklinks page is displayed.

3. Check off the titles of the quicklinks that you would like to update.

NOTE   Check off the box in the table header to select all or deselect all.

4. In the **To:** text field on the page, enter the name of the template that you would like to apply to the selected quicklinks.

5. Click on the **Update Quicklinks** button( ) to update the changes.

   A confirmation message is displayed.

6. Click **OK** to continue.

   The selected quicklinks are updated to use the template specified.

Managing Users & User Groups

Users are the people who administer the Web site, create content, or publish content. Without the users, the Web site would be blank. In Ektron CMS200/300, you can add, edit, and delete users to and from the application through the Administrator Workarea.

Every user of Ektron CMS200/300 belongs to a User Group. User groups are used when creating permissions and approvals for each content folder. User groups can be defined as anything. The user groups can be departments in your company, for example, Human Resources, Sales, Engineering. They could also be the roles of the users in the group, for example, Publishers, Administrators, Editors, etc.

IMPORTANT! If your system uses the Active Directory Integration Feature, proceed to "Active Directory Feature" on page 514 to learn about user management functions. This chapter only applies to systems that do not use Active Directory Integration.

This section explains how to manage your Ektron CMS200/300 users and user groups.

Getting Started with Users and User Groups

This section explains the most common actions that you will need to perform on users and user groups.

These actions include:

Accessing the Users and User Groups Folders

All user and user group information is accessible from the administrator workarea.

Accessing the User Folder

To access the user folder in Ektron CMS200/300, perform the following steps:

1. Access your administrator Workarea.
2. Click on the Settings folder button from the left frame of the workarea window.

   The folders tree under the Settings folder will display in the folder hierarchy.
3. Click on the **Users** folder from the folder tree.

   A table of all Ektron CMS200/300 users is displayed.

From this page, you can add, edit, and delete users. These procedures are explained in the next sections.

Accessing the User Group Folder

To access the user folder in Ektron CMS200/300, perform the following steps:

1. Access your administrator Workarea.
2. Click on the Settings folder button from the left frame of the workarea window.

   The folders tree under the Settings folder will display in the folder hierarchy.
3. Click on the **User Group** folder from the folder tree.

   A table of all Ektron CMS200/300 user groups is displayed.

From this page, you can add, edit, and delete user groups. These procedures are explained in the next sections.

Creating A New User

Before you are able to assign a user to a specific user group, you must first add the user into the system.

To create a new user, perform the following steps:

1. Access the Users folder in your Workarea as described in
   "Accessing the User Folder" on page 166.

2. Click on the **Add User** button( ) from the toolbar.

   The "Add a New User to the System" page is displayed.

3. Enter all the information about the user including:

Field	Description
Username	Insert a username for the user you want to create.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Password	Confirm the password by typing it again.
User Language*	Select the language the user will view Ektron CMS200/300 in.
E-mail Address	Enter the e-mail address of the user.
Disable E-mail Notification	Select to disable the e-mail notifications for the user.

* Different languages will not be supported until you download the Ektron
CMS200/300 Language Support Program from Ektron, and translate the
Web site.

NOTE   If E-mail notification is turned off in the setup page, you will be notified when
editing, adding, or viewing a user.

4. Click on the **Save** button( ) from the toolbar to save your
   changes.

   The "View Users in Group Everyone" window is displayed with
   the new user included in the table.

NOTE	Each time you add a new user to Ektron CMS200/300, they will automatically be placed in the "Everyone" user group. To assign users to other groups, see "Assigning Users To User Groups" on page 168.

5. Continue this process until you have added all the users that you need for your Web site, or are allowed to depending on your license.

NOTE	Contact Ektron Sales for pricing for adding more Users to your license.

Creating A New User Group

To create a new User Group in Ektron CMS200/300

1. Access the User Groups folder in the administrator Workarea as described in "Accessing the User Group Folder" on page 166.

2. Click on the **Add User Group** button( ) from the toolbar.

    The "Add a New User Group to the System" page is displayed.

3. Enter the name and a brief description about the user group that you would like to create.

4. Click on the **Save** button( ) from the toolbar to save your changes.

    The "View User Groups" page is displayed with the new user group added to the table.

Assigning Users To User Groups

In this section, you will learn how to assign the users you created, to user groups. This is useful if you want to assign users to groups based on their department or role in the company.

To add a user to a user group, perform the following steps:

1. Begin by accessing the User Groups folder in the administrator Workarea.

2. Click on the name of the user group you would like to add a user to.

    The "View Users in Group" page is displayed with a table of all users that currently belong to the selected user group.

3. Click on the **Add User** button(🖳) from the toolbar.

    A list of all users that do not already belong to the selected user group is displayed.

4. Click on the **Username** of the user you would like to add to the user group.

    A confirmation message is displayed.

5. Click **OK**.

    The selected user is now a member of the selected user group.

6. Continue this process until you add all the Users into their respective User Groups.

Managing Users

This section explains other tasks that may be performed on Ektron CMS200/300 users.

Viewing A User

After adding a user, you will have the option to view the information for a specific user in the Ektron CMS200/300 application. When you view a user, you will see the information about the user, and you will also have the ability edit or delete the user.

To view a user, perform the following steps:

1. Access the user folder as described in "Accessing the User Folder" on page 166.

2. Click on the **Username** of the user you want to view.

    The "View User Information" page is displayed.

From the "View User" page, you can edit or delete users. These actions are described in the next sections.

Editing A User

When you edit a user, you can change just about any information about the user. That is, you can change the username, first name,

last name, password, user language, and email address of the user.

To edit a user, perform the following steps:

1. Begin by accessing the view user page of the user you want to edit as described in ”Viewing A User” on page 169.

2. Click on the **Username** of the user you want to edit.

   The “View User Information” page is displayed.

3. Click on the **Edit** button( ) from the toolbar.

   The “Edit User” page is displayed.

4. Make the necessary changes to the user information.

5. Click on the **Update** button( ) from the toolbar to save your changes.

   The user information is saved and updated.

Deleting A User

When you need to remove a user from the application, you can easily do it from the Users Folder in the Administrator Workarea.

NOTE Once a user is deleted from the database, they are deleted permanently, and the process cannot be undone.

To delete a user, perform the following steps:

1. Accessing the view user page for the user you would like to delete as described in ”Viewing A User” on page 169.

2. Click on the **Username** of the user you want to delete.

   The “View User Information” page is displayed.

3. Click on the **Delete** button( ) from the toolbar to delete the user.

   A confirmation message is displayed.

4. Click **OK**.

   The user is now deleted from the Ektron CMS200/300 Web site.

Removing Users from User Groups

Similar to adding users to a user group, you may also remove users from a user group.

NOTE   Removing, or deleting, a user from a User group does not delete the user from Ektron CMS200/300.

To remove a user from a user group, perform the following steps:

1. Access the User Groups folder as described in "Accessing the User Group Folder" on page 166.

2. Click on the title of the User Group that contains the user that you wish to remove.

   A list of users that are members to the selected group is displayed.

3. Click on the username of the user you want to remove from the user group.

   The "View User Information" page is displayed.

4. Click on the **Delete** button(🗑) from the toolbar to delete the user from this user group.

   A confirmation message is displayed.

5. Click **OK**.

   The user is removed from the user group, and the view users page for the user group is displayed with the changes reflected.

Managing User Groups

This section explains other tasks that may be performed on Ektron CMS200/300 user groups.

Viewing the Users in a User Group

To view a list of users that are members of a user group, perform the following steps:

1. Access the User Group folder in the administrator Workarea as described in "Accessing the User Group Folder" on page 166.

2. Click on the User Group Name of the user group you want to view the members of.

   The "View Users in Group" page is displayed with a list of all users who are members of the user group.

From this page, you can edit or delete user groups, as well as add and remove users to and from the user group.

Editing A User Group

When editing a User Group, you are only changing and updating the name of the User Group.

NOTE The default "Administrators" and "Everyone" user groups cannot be edited.

To edit a user group, perform the following steps:

1. Accessing the "View Users in Group" page for the user group you would like to edit as described in "Viewing the Users in a User Group" on page 171.

2. Click on the title of the User Group that you wish to edit.

   The "View Users In Group" page is displayed.

3. Click on the **Edit** button( ) from the toolbar.

   The "Edit User Group" page is displayed.

4. Make the necessary changes in user group name field.

5. Click on the **Update** button( ) from the toolbar to save your changes.

   The "View User Groups" page is displayed with the changes updated.

Deleting A User Group

When you do not need a User Group anymore, you can delete it from the system.

NOTE The default "Administrators" and "Everyone" user groups cannot be deleted.

To delete a user group, perform the following steps:

1. Accessing the "View Users in Group" page for the user group you would like to delete as described in "Viewing the Users in a User Group" on page 171.

2. Click on the title of the User Group that you wish to delete.

   The "View Users In Group" page is displayed.

3. Click on the **Delete** button(▯) from the toolbar to delete the user group.

   A confirmation message is displayed.

4. Click **OK**.

   The User Group is now deleted from the Ektron CMS200/300 Web site.

Ektron CMS200/300 Help

The help folder in the administrator workarea is a center of important and useful information about using Ektron CMS200/300. The help folder provides you with a centralized location of the manuals as well as a link to the Ektron CMS200/300 Online help page.

To access the help folder

1. Begin by accessing the Administrator Workarea by clicking on the Workarea icon in a content block

   Or by clicking on the Workarea button on your Web page
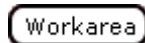
2. Click on the Administrate folder button in the left frame of the workarea window.

   A list of all the folders under the Administrate folder is displayed.

3. Click on the **Help** Folder to view its contents.

A list of manuals will be displayed in the main section of the workarea.
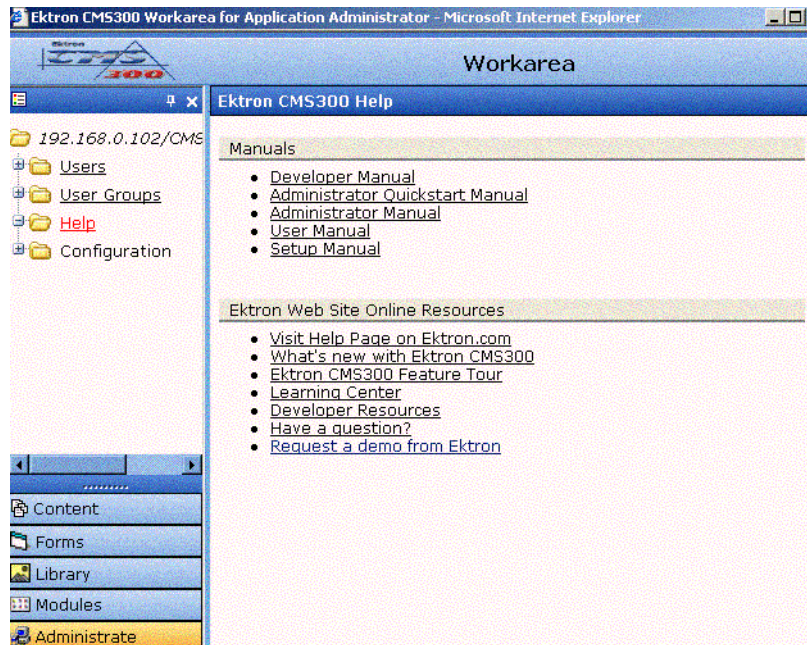
4. Click on a link to open the manual or Web page.

Font Manager

As an administrator, you are able to add, edit, and delete fonts to and from the Ektron CMS200/300 application. By adding fonts, you are allowing the content contributors to use them when they are creating their content through the editor provided with Ektron CMS200/300. Administrators can also edit the name of a font, and delete a font from the system.

Keeping a minimum amount of fonts in the application allows the Web site to look more uniform.

Shown below is the Font Manager in the Administrator Workarea:
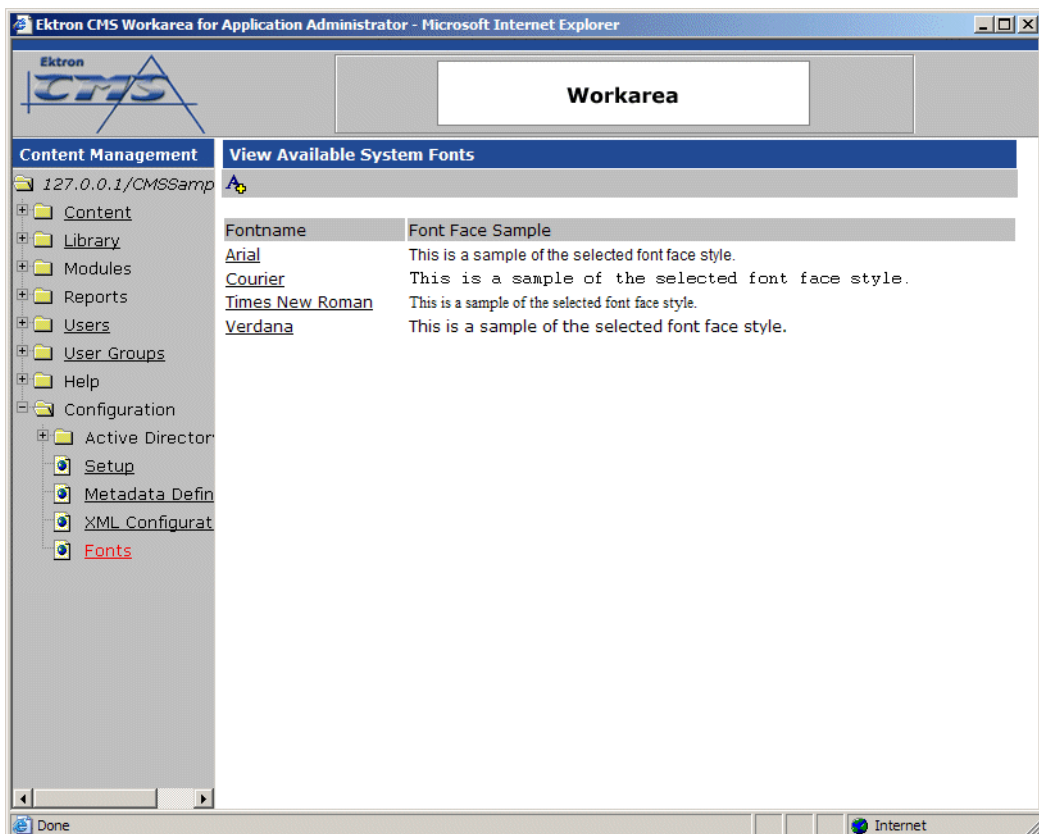
Accessing the Font Manager

Before you begin adding, editing, and deleting fonts from the application, you must first access the Font Manager. From the Administrator Workarea, click on the Font folder.
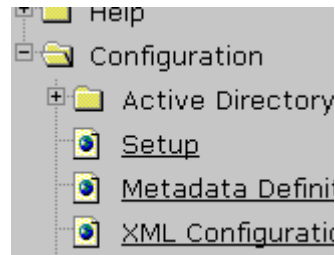
When you enter the font manager, you will see a list of all the current fonts already added to the application. From this area, you have the ability to add or view a font.

Adding Fonts

To add a font to the application:

1. Begin by accessing the font manager in the administrator Workarea as described in "Accessing the Font Manager" on page 177.
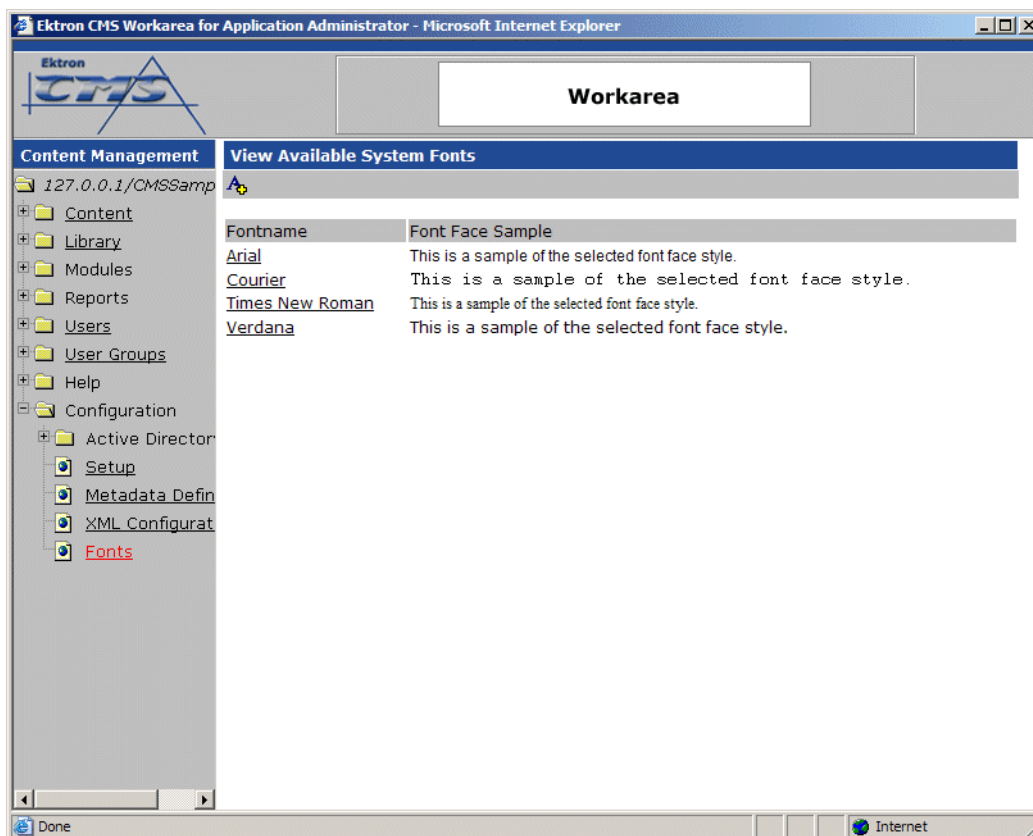
2. Click the add font button at the upper left side of the window

The add font page is displayed.
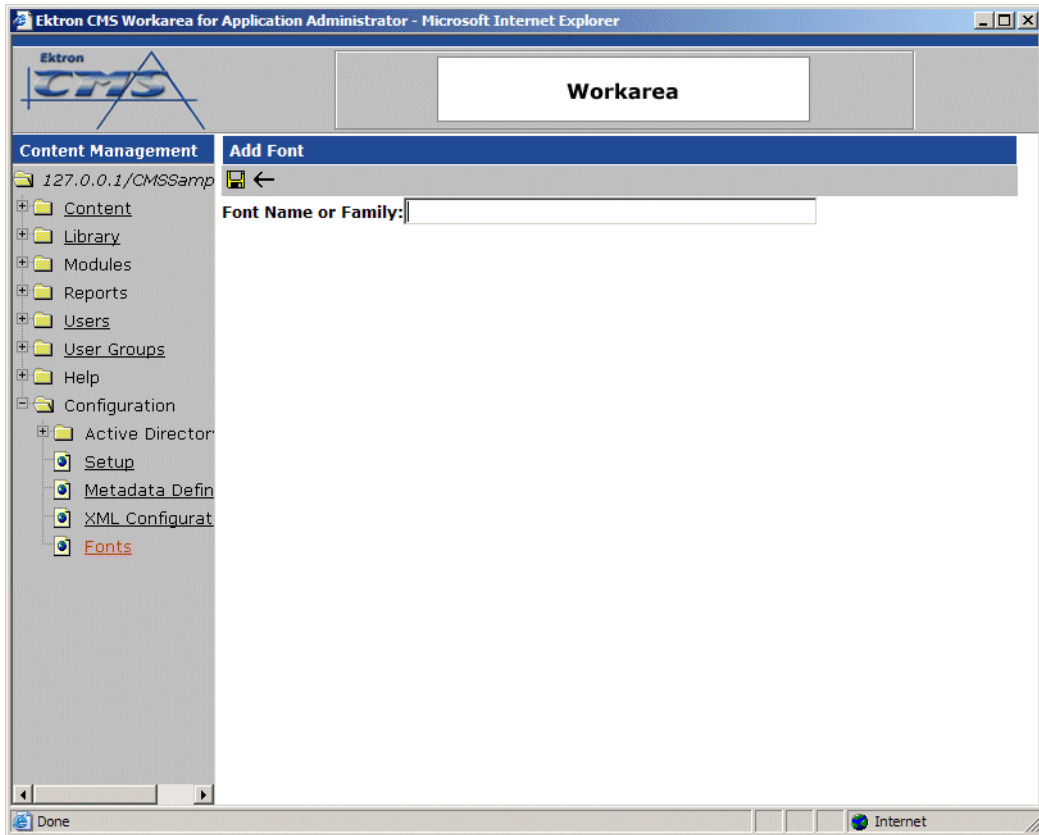
3. Enter the font name or family into the text field provided
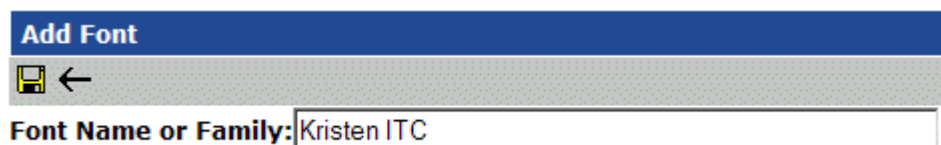
4. Click the save button in the toolbar at the top of the page.

The page is refreshed, and the updated fonts table is displayed.

View Available System Fonts

Fontname	Font Face Sample
Arial	This is a sample of the selected font face style.
Courier	This is a sample of the selected font face style.
Kristen ITC	This is a sample of the selected font face style.
Times New Roman	This is a sample of the selected font face style.
Verdana	This is a sample of the selected font face style.

Once added, the font is now available for users to use when adding or editing Web site content.
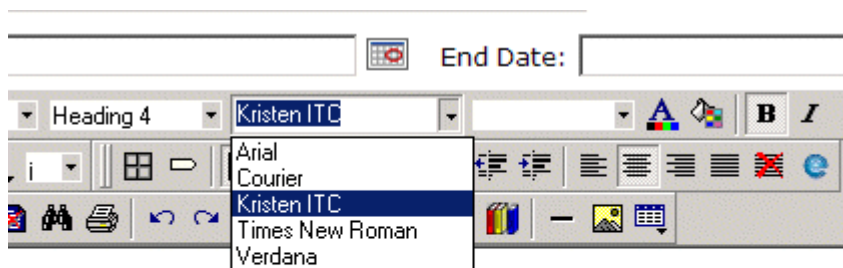
Welcome to RC International!

al is dedicated to the RC racing enthusiasts! We eat, work, play
e short years RC International has become one of the leading m

Viewing Fonts

By viewing fonts, you will also have the ability to edit or delete the fonts from the application.

To view a font:

1. Begin by accessing the font manager in your administrator Workarea as described in "Accessing the Font Manager" on page 177.
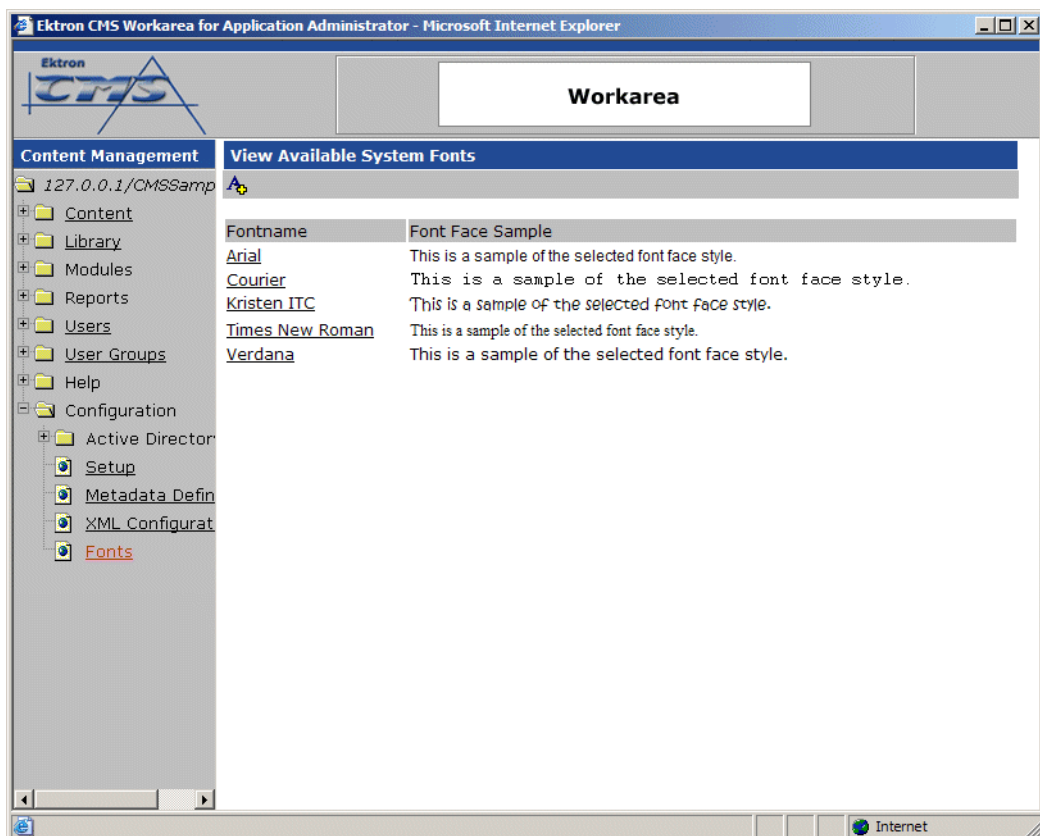
2. Click on he name of the font you would like to view.

The view font page is displayed.
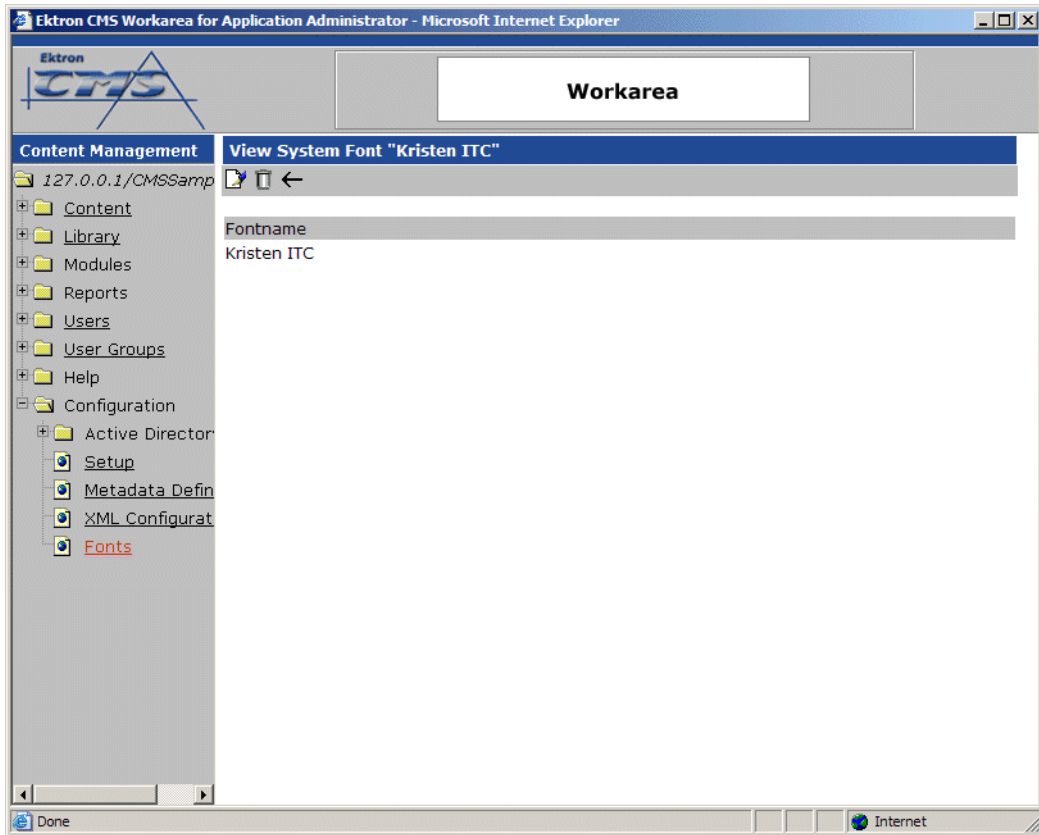
Edit Fonts

When a font is edited, the font name or family name is changed in the application.

To edit a font name:

1. Begin by accessing the view font page as described in "Viewing Fonts" on page 180.
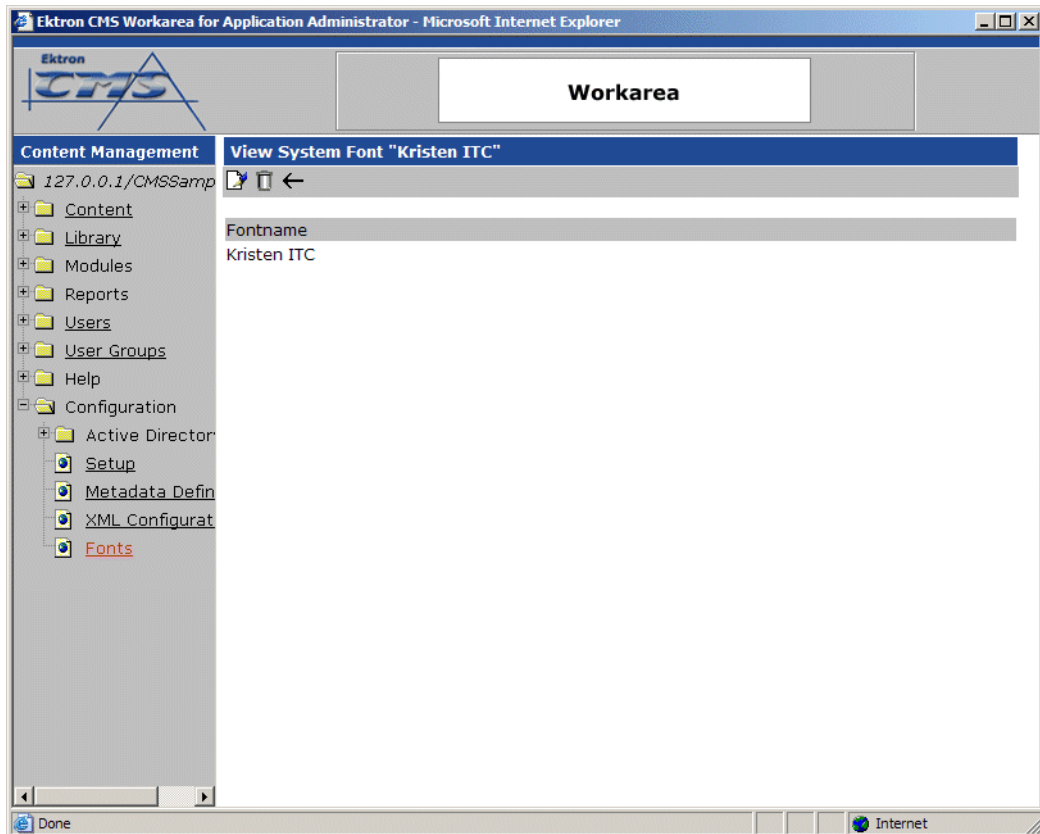
2. Click on the edit button in the toolbar at the top of the page.

The edit font page is displayed.
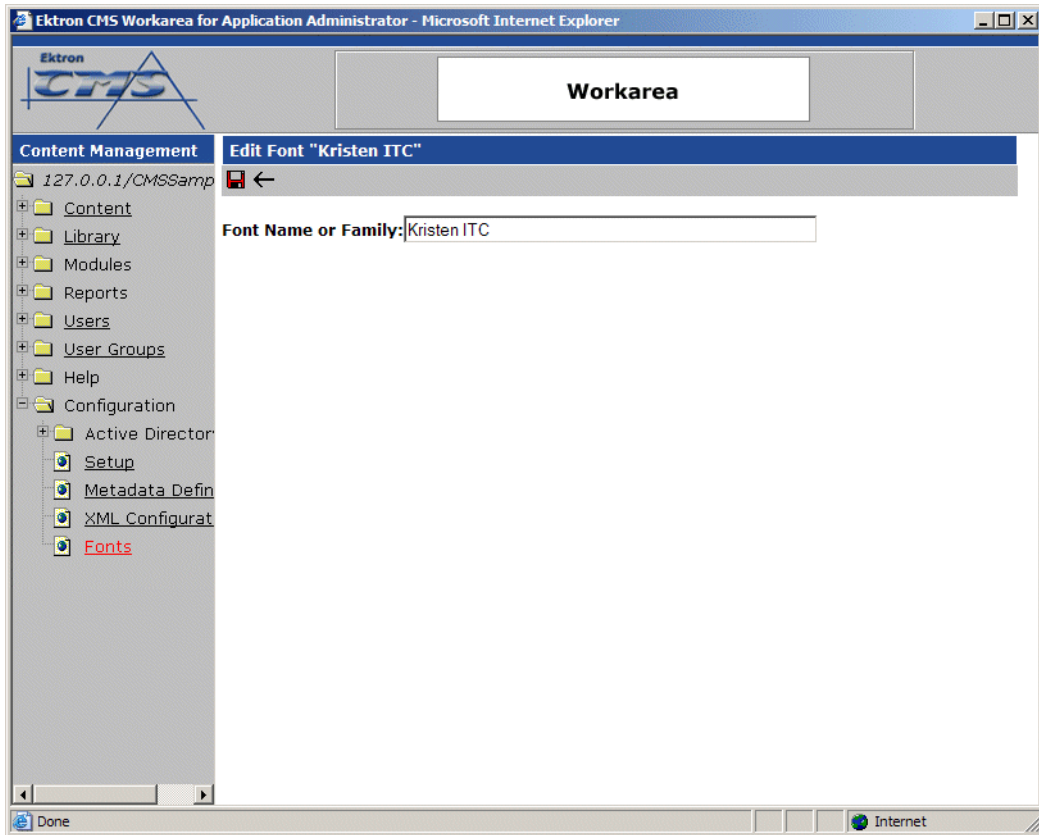
3. Edit the font name or family in the text field specified.
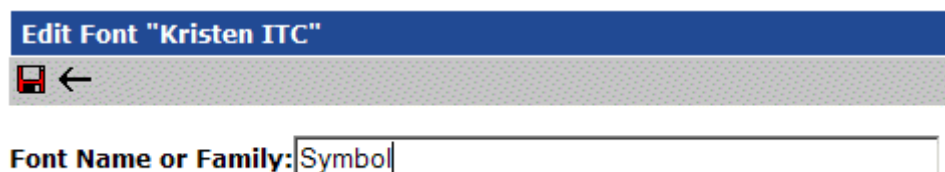
4. When finished, click the update button in the toolbar at the top of the page to save and update the changes.

The page is refreshed, and the updated fonts table is displayed.

View Available System Fonts

Fontname	Font Face Sample
Arial	This is a sample of the selected font face style.
Courier	This is a sample of the selected font face style.
Symbol	Τηισ ισ α σαμπλε οφ τηε σελεχτεδ φοντ φαχε στψλε.
Times New Roman	This is a sample of the selected font face style.
Verdana	This is a sample of the selected font face style.

Delete Fonts

By deleting a font from the system, you are taking away the content contributors use of that font in their content blocks.

To delete a font:

1. Begin by accessing the view font page as described in "Viewing Fonts" on page 180.
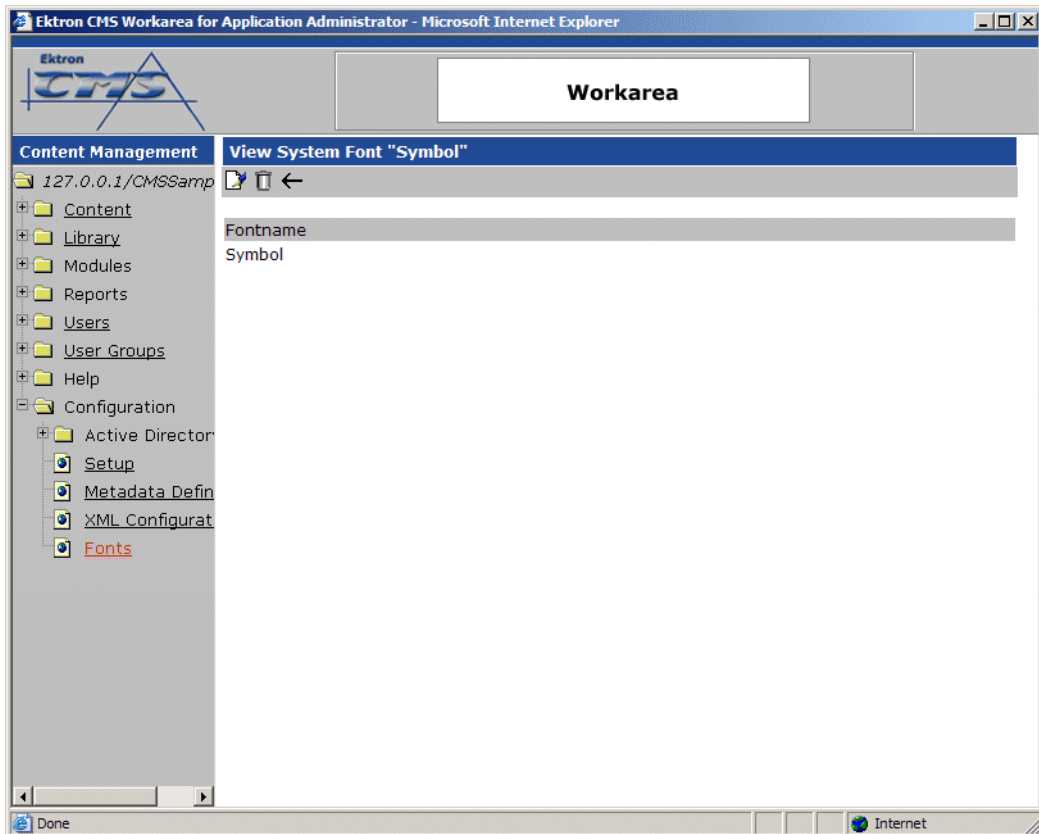
2. Click on the delete button in the toolbar at the top of the page.

The following message is displayed.
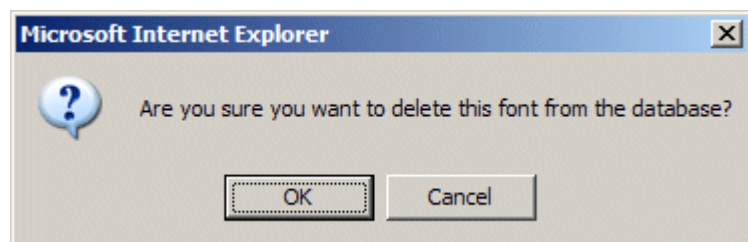
3. Click the OK button to proceed with deleting the font.

The page is refreshed, and the updated fonts table is displayed.
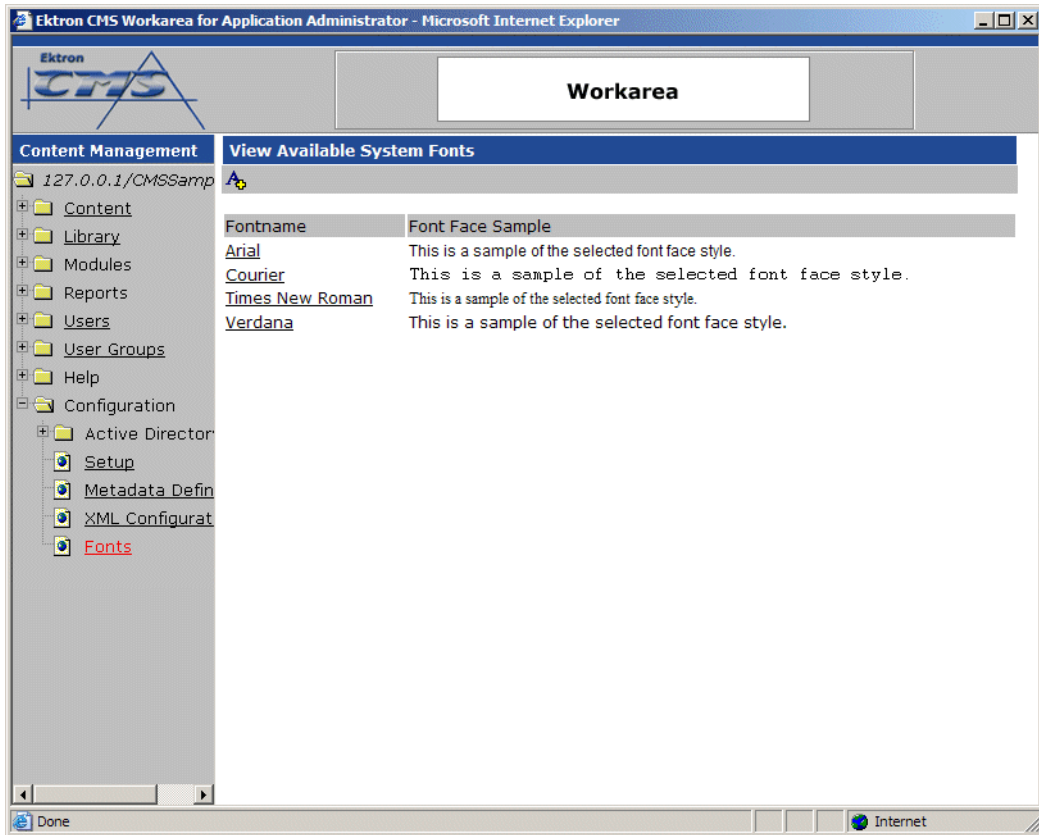
NOTE	When you delete a font from Ektron CMS200/300, you do not delete the font from the machine.

Special Features

This chapter will look at Ektron CMS200/300 special features. You will learn about:

- "XML Support" on page 735
- "Plumtree Portal Support" on page 432
- "Web Services" on page 452
- "Syndicating Web Content as RSS" on page 453
- "Load Balancing" on page 454
- "Scheduling Content" on page 486
- "Summaries" on page 491
- "Metadata" on page 494
- "E-Mail Notification" on page 505
- "Search" on page 506
- "JavaScript Syndication" on page 508

Using eWebEditPro

The following image displays the editor supplied with Ektron CMS200/300, eWebEditPro+XML.
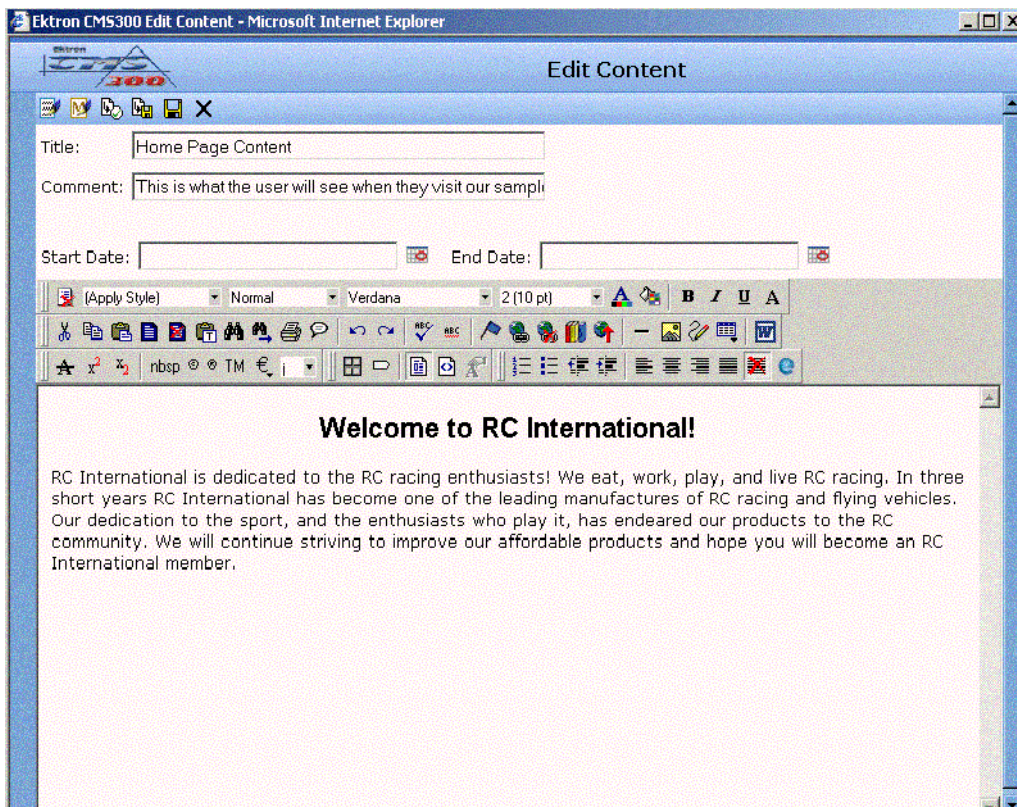
For more information about using the editor supplied with Ektron CMS200/300, please refer to the Ektron CMS200/300 *User Manual, Version 4.5, Revision 4.*

Using the Data Designer

Introduction
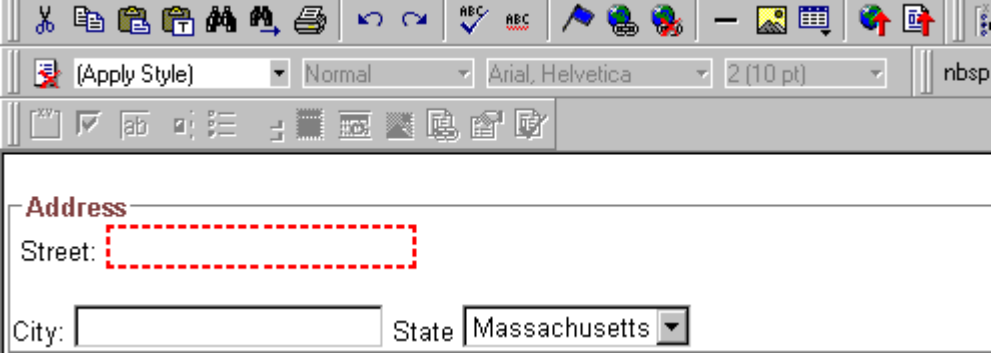
Ektron CMS200/300's Data Designer feature lets you design a screen that collects information from users and stores it as XML data. Creating the screen is simple and requires no knowledge of XML.

NOTE   When using the Data Designer feature, the following browsers are supported: Netscape 6.2 or later; Internet Explorer 5.5 or later.

For example, you may create the following screen.

This screen can store information entered by a user as the following XML.

```
 <address>
<street>123 Sesame St.</street>
<city>New York</city>
<state>NY</state>
 </address>
```

Note that the street and city fields accept text, while the state field accepts a pre-defined value (a state).

This section explains how to use the Data Designer feature through the following topics.

- ”Differences in Ektron CMS200/300” on page 191
- ”Design Mode vs. Data Entry Mode” on page 193
- ”Designing a Screen” on page 193
- ”Inserting a Field Type” on page 194
- ”Sample Screen Design” on page 196
- ”Data Designer Field Types” on page 204

Differences in Ektron CMS200/300

When you use the Data Designer, **Ektron CMS200/300** changes in the following ways.

NOTE   The design toolbar and the design mode and Data Entry mode buttons appear only if your site administrator has defined them in the configuration data.

- two toolbars appear, illustrated below. The toolbar buttons let you design the data entry screen. Each button represents a different kind of field.
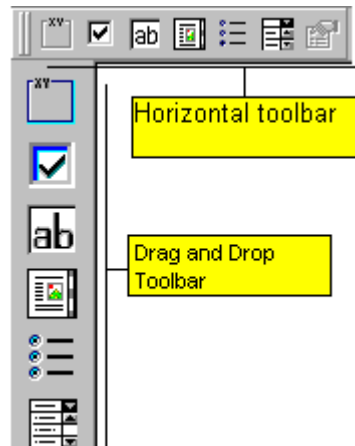
Both toolbars provide mostly the same buttons. The major difference between them is how you use the button to add a field to the screen. If you are using the *horizontal* toolbar, place the cursor where you want to place the field, and click the toolbar button.

When using the *drag and drop toolbar*, drag a button to desired screen location.

Note that a context-sensitive menu, available by right clicking the mouse, is also available to perform the commands. You can right click the mouse then select **Insert Field** to display a context-sensitive menu of all commands. To edit the properties of any field already on the screen, select the field, right click the mouse, and select **Field Properties**.

- two buttons appear on the regular (Edit) toolbar: Design mode and Data Entry mode. (For more information, see "Design Mode vs. Data Entry Mode" on page 193.)

The Data Entry mode button lets you preview the screen being created.

- several regular toolbar buttons are grayed out because they do not work with Data Designer

Design Mode vs. Data Entry Mode

The Data Designer feature supplies two "modes," which makes it easier for you to design screens:

- *Data Design mode* - lets you insert and remove fields from the data entry screen

- *Data Entry mode* - simulates the screen's appearance during data entry

Two toolbar buttons let you switch between modes. The buttons are located on the Edit toolbar.
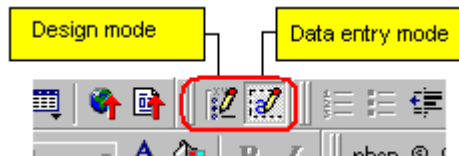
When you begin to create a data entry screen, you are in design mode. To test the screen as the user will see it, click on the **Data Entry** button ( )from the editor toolbar. To switch back to Data Entry mode and modify the data entry screen, click the **Data Designer** button ( ).

Designing a Screen

To design a screen that captures XML data, you

1. Ask your system administrator to enable a version of **Ektron CMS200/300** that includes the Data Designer.

2. For each field on the screen, select a field type, and place it on the screen. "Inserting a Field Type" on page 194 explains the kind of field that each button represents.

    You can also use **Ektron CMS200/300**'s rich formatting capabilities to design the screen. For example, you can format text, and use tables, images and hyperlinks to guide the user through the data entry process. Below is a sample screen created with the Data Designer.

sic Information

tures of Property:

cription:

floor unit w/ balcony and one deeded garage space and central air

| LS#: 31710 | #Bedrooms: 2 | #Full Baths: 1 | #Half B |
| ar Built: | Lot Size (Sq Ft): | Interior Size (Sq Ft): 928 | Last Ye |

Inserting a Field Type

Ektron CMS200/300 provides several options that lets you insert or edit fields in the editor. Each field type is described below.

Field type	Icon	Description	For more information, see
Group Box		Groups related fields, which can be surrounded by a box and have a caption	"Group Box ()" on page 204
Checkbox		User's response is either checked or unchecked	"Checkbox ()" on page 207

Field type	Icon	Description	For more information, see
Plain Text		Plain text field where the user cannot format text.	"Plain Text()" on page 208
Rich Area		Text field where the user can format text using the editor.	"Rich Area ()" on page 213
Choices		Several choices appear on screen. User checks appropriate boxes. All user choices are inserted as values within single XML tag.	"Choices ()" on page 215
List		Same as Choices except options appear in a drop-down box	"Select List ()" on page 218
Calculated		Performs calculations using other fields on the screen.	"Calculated Field ()" on page 220
Calendar		Lets user insert a date by clicking a calendar.	"Calendar Field ()" on page 230
Image Only		Lets user insert an image.	"Image Only Field ()" on page 232
File Link		Lets user insert a link to a file, such as a PDF document.	"File Link Field ()" on page 234
Field Properties		Lets you change the properties of any field. Select the field then click this button. This option is also available on the right click menu, but not available on the drag and drop toolbar	

Deleting a Field from the Screen

To remove a field from the screen, follow these steps.

1. Move the cursor to the field.
2. When the cursor changes to a four-headed arrow, click the mouse.

3. Small boxes surround the field.
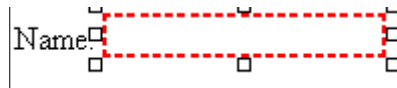
4. Click on the **cut** icon (✂) from the editor toolbar to remove the field.

Usually, the field label is not deleted when you delete a field. To delete the label, use standard **Ektron CMS200/300** editing buttons.

Sample Screen Design

This section provides a brief overview of designing a screen, so that you can learn how the pieces fit together. Let's assume you want the screen to look like this.
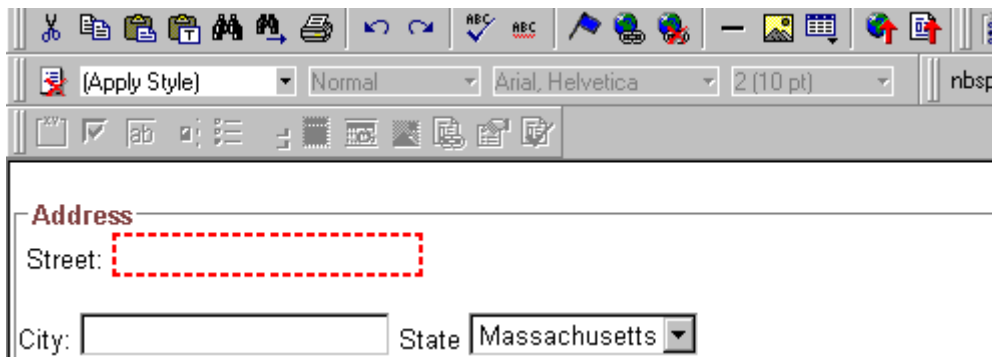
To create such a screen, follow these steps.

1. Access the XML Configurations page as described in "Accessing XML Configurations" on page 98.

2. Click on the **Add XML Configuration** button( ) from the toolbar.

   The "Add XML Configuration" page is displayed.

3. Type in a title for the XML configuration.

4. Click on the **Save** button( ) from the toolbar.

   The XML configuration data designer page is displayed.
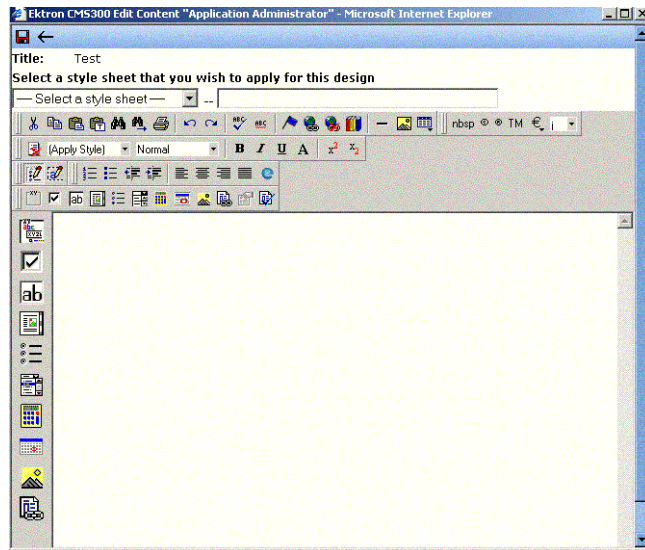
5. Since you want to surround the data entry fields with a box and

a caption, drag the **Group Box** button ( ) from the drag and drop toolbar onto the screen. Then, complete the dialog as shown below.
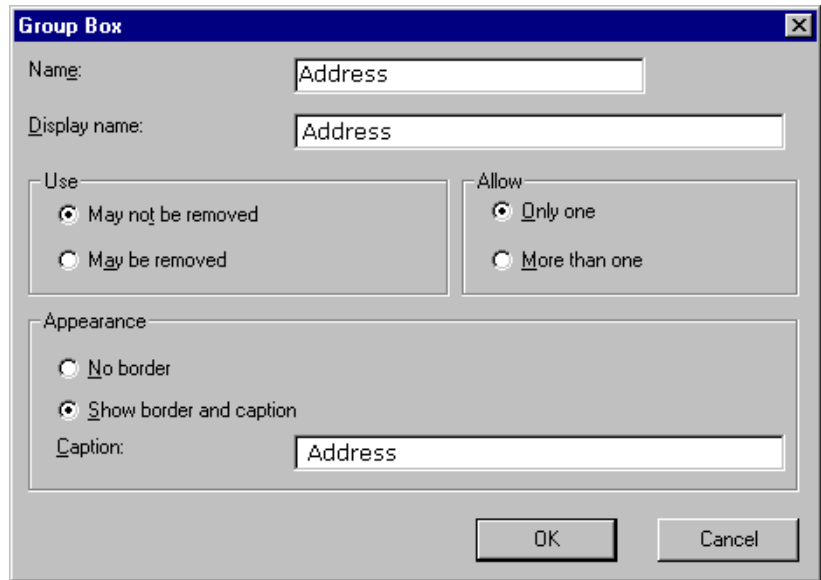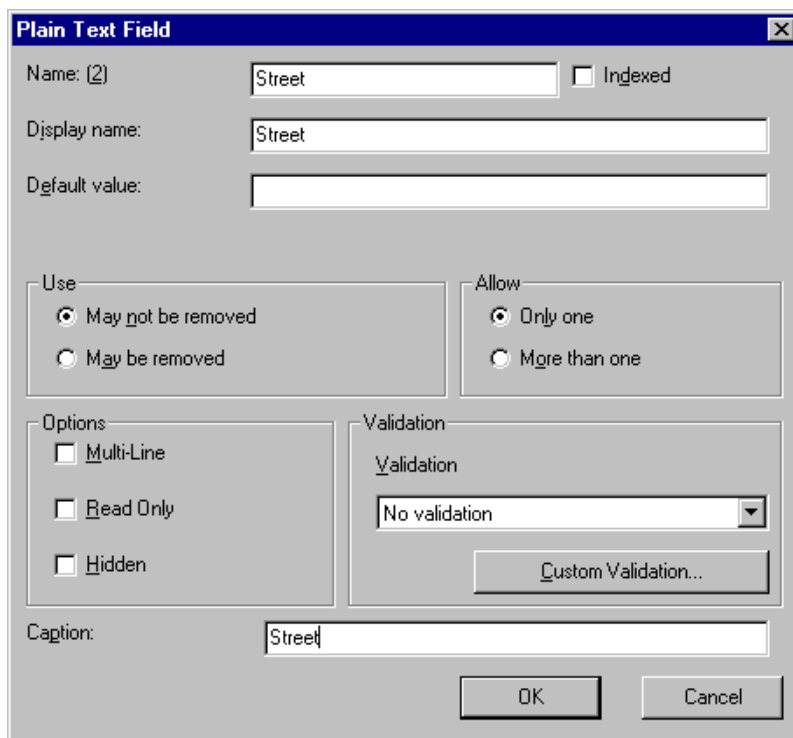
At this point, the screen looks like this.
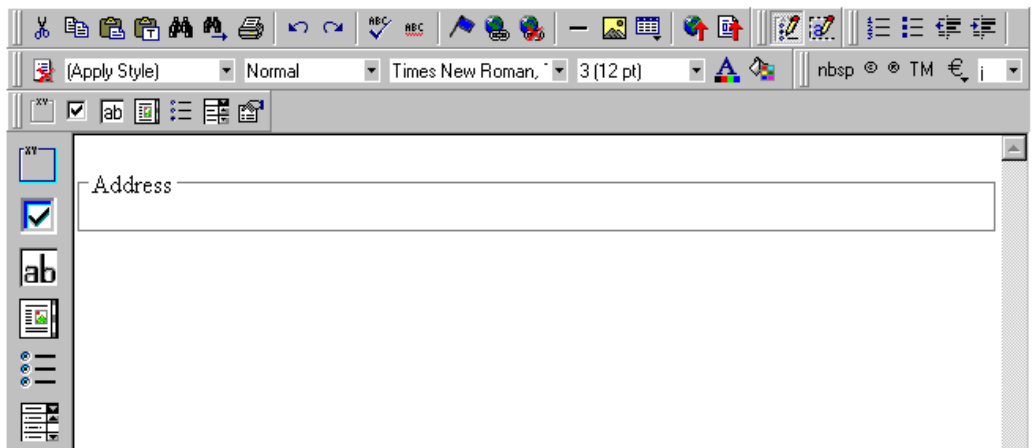
6. Select Address then apply bold and the custom color shown above. Now the screen looks like this.
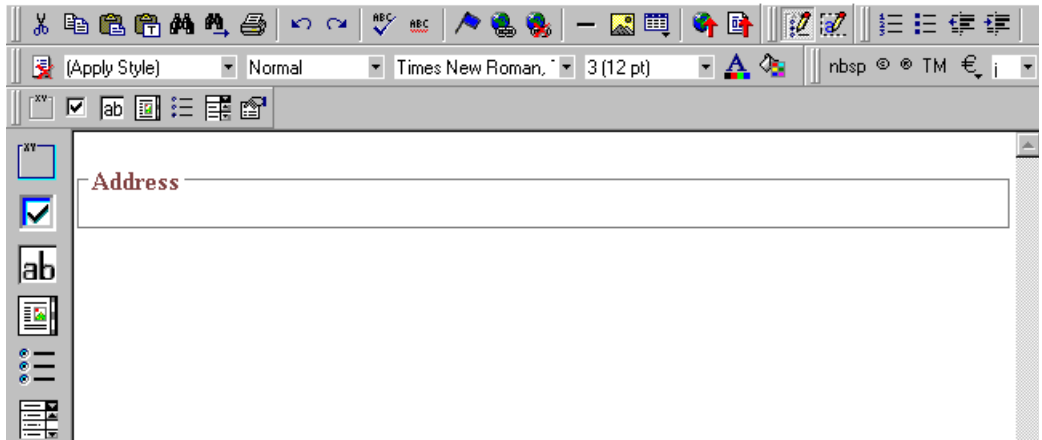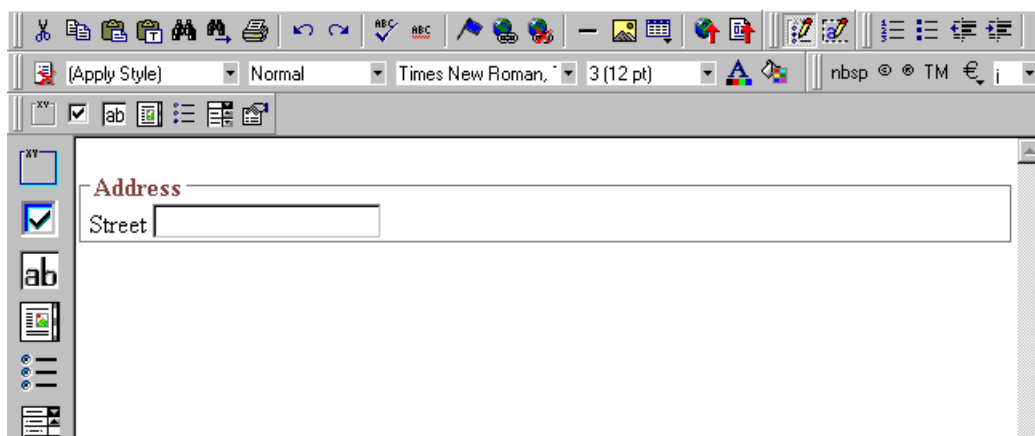
7. The next field, street, should let the user enter text. So, drag the **plain text field** icon (`ab`) into the space below **Address**. Then, complete the dialog as shown below.

Now, the screen looks like this.

Note that the **Street** field is not wide enough. To widen it, click on the field, move the cursor until you see a two-sided arrow, and drag the arrow to the right.
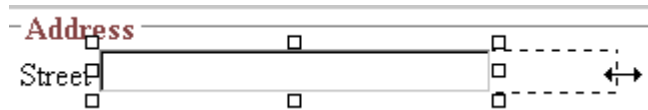
8. The next field, **City**, should also let the user enter text. Assume that you want **City** to appear in the line below **Street**. To make room for **City**, move the cursor to the end of the **Street** field
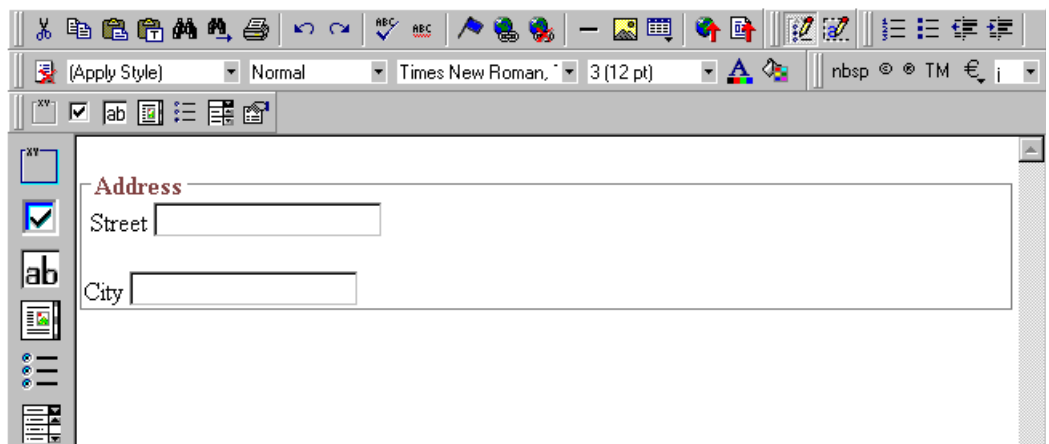
and press <Enter> to create a new line. Next, drag the **plain text field** icon (ab) into the line below **Street**. Then, complete the dialog as shown below.

Now, the screen looks like this.

9. The next field, **State**, should let the user choose from several states. Assume that you want the state to appear to the right of **City**. Move the cursor to the end of the **City** field and drag the

   Select List Field icon (📇) into that space. Then, complete the dialog as shown below.

NOTE   The above screen has three selection items. However, there is no limit to the number of items you can enter.

Now, the screen looks like this.

The above example is very simple and does not use some of the Data Designer's more powerful and flexible features. To learn more about Data Designer, read the rest of this chapter.

Data Designer Field Types

To help you use all of the Data Designer's capabilities, this section explains each field type you can insert. As you will see, they are very flexible and should accommodate all of your needs when designing a data entry screen.

Group Box ()

A Group Box field lets you group related fields together on a screen by surrounding them with a box and optionally placing a caption above them.

After you insert a Group Box field, to insert other kinds of fields within the box,

- drag the fields into the box (if you are using the drag and drop toolbar)

or

- place the cursor inside the box then select a field type button (if you are using the horizontal toolbar)

Advantages of Grouping Fields

An advantage of grouping fields is that you can allow the user in Data Entry mode to add groups as needed. For example, if a screen collects several fields of information about each telephone call, the user could simply click the **Insert Below** button to insert a new group of fields, ready to collect information about the next call.
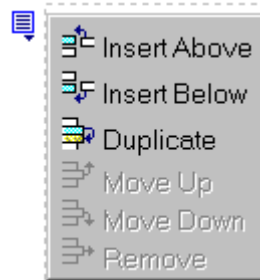
Dialog Box

Fields on the Group Box Dialog

Field	Description
Name	Enter the name of this field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. **The Name Field's Default Value** By default, the Data Designer assigns a name made up of **Field** followed by the next available number. So, the first field's default name is **Field1**, the second field's default name is **Field2**, etc. You can change the default if you want.
Display Name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 236
Allow	See "The Allow Field" on page 237
Appearance	Click **Show border and caption** if you want to surround the fields in this group with a box. You can also create a caption to appear in the top line of the box. Click **No border** if you do not want to surround the fields in this group with a box.
Caption	If desired, enter text to describe this group of fields on the data entry screen. For example ┌ Address ───────────────── After you insert this field onto the screen, you can use **Ektron CMS200/300**'s formatting capabilities to modify its size, font, color, and other attributes. Note: The Caption field only appears on this dialog when you create the Group Box field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

Checkbox (☑)

A Checkbox field is only one character wide and accepts one of the two possible values: checked or unchecked. For example

☐ Check if you are over 65
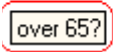
Dialog Box

Checkbox Field	✕
Name: ☐ Indexed	
Display name:	
Default value:	
○ True (checked)	
◉ False (unchecked)	
Caption:	
OK Cancel	

Fields on the Checkbox Dialog

Field	Description
Name	Enter the name of the field.
	Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|'~) into this field.
	See Also: "The Name Field's Default Value" on page 206
Indexed	Check if you want to index this field.
	The **Indexed** field may not appear, depending on how your administrator set up your system.

Field	Description
Display name	Enter text that appears when a user hovers the cursor over this field (circled in red below). ☐ Check if you are over 65 over 65?
Default value	If you want this field to be checked when the screen first appears, click **True**. Otherwise, click **False**.
Caption	Enter text to guide the user's response to this field. To continue the above example, the caption would be **Check if you are over 65**. After you insert this field onto the screen, you can use Ektron **Ektron CMS200/300**'s formatting capabilities to modify its size, font, color, and other attributes. Note: The Caption field only appears on this dialog when you create the Check Box field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

Plain Text(ab)

Use a plain text field when you want the user to enter an unformatted, free text response.

NOTE   If a plain text field tries to perform a numerical calculation with a value that is blank or contains letters, NaN appears in the field. (NaN stands for "not a number.") If a plain text field tries to divide by zero, Infinity appears.

Plain Text Field vs. Rich Area Field

The following capabilities are available with a plain text field but not with a rich area field.
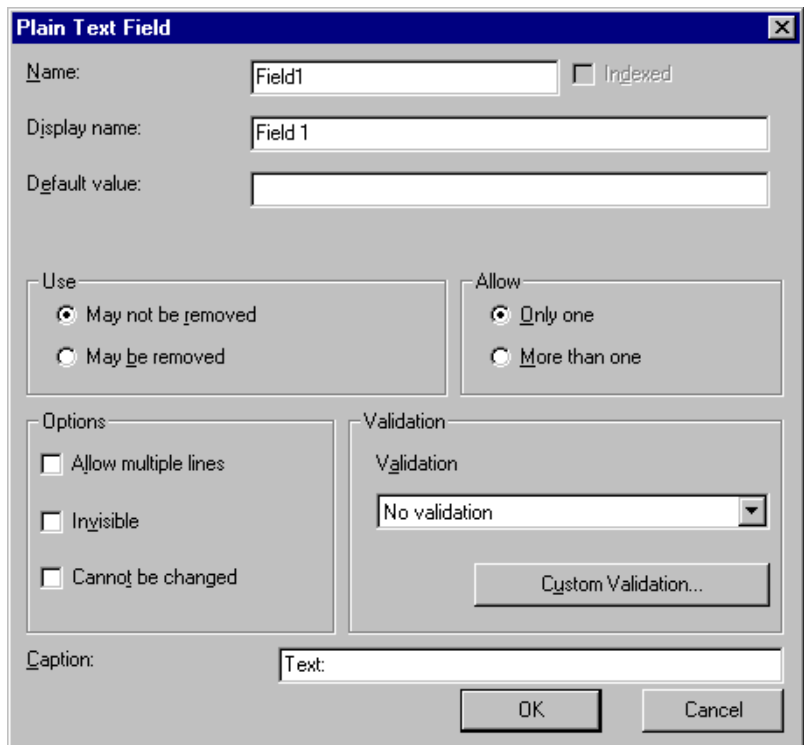
- You can validate the user response. For more information, see "Validation" on page 212.

- You can adjust the field's width by dragging it. See "Resizing a Plain Text Field" on page 213.

- The text can be read-only or hidden

The following capability is available with a rich area field but not with a plain text field.

- In Data Entry mode, the user can change the text's format, size, style, etc. along with adding hyperlinks, using **Ektron CMS200/300**'s formatting capabilities.

- You can enter custom tags.

Dialog Box

Fields on the Plain Text Dialog

Field	Description
Name	Enter the name of this field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 206
Indexed	Check if you want to index this field. The **Indexed** field may not appear, depending on how your administrator set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this field.
Default Value	If you want to set a default value for this field, enter that value here. The default value appears in Data Entry mode, where the user can accept, change, or delete it. For example, if this field collects a city, and most users enter New York, enter New York as the value.
Use	See "The Use Field" on page 236
Allow	See "The Allow Field" on page 237

Field	Description
Options	**Invisible** - Check here to make this field hidden in Data Entry mode. This option lets you store unseen information in each XML document. An example might be putting a version number for the data design so that XML documents can be upgraded to newer versions using an XSL transform. A field can be either `invisible` or `cannot be changed` -- it cannot be both. **Allow multiple lines -** Check here to let this text box expand to accommodate the user's input. If you do not check this box, a single line input box appears on the data entry screen to accept user input. **Cannot be changed** - Check here to make this field read-only. That is, the user cannot insert data into it in Data Entry mode. You might use this option to provide user instructions for completing the screen.

Field	Description
Validation	Select the kind of validation to apply to this field. Your choices are: • **No validation** - the user's response is not checked. • **Cannot be blank** - the user must enter a response. • **Non-negative whole number or blank** - the user must enter a positive whole number *or* no response. • **Non-negative whole number (required)** - the user must enter a positive whole number. • **Decimal number or blank** - must be a decimal number (for example, 12.345 or 12) or blank. A leading minus sign "-" is allowed. The decimal point must be a period (.), even in locales that normally use a comma (,). Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000. • **Decimal number .00 required -** must be a decimal number (it cannot be blank) of none, one, or two decimal places. A leading minus sign "-" is allowed. The decimal point must be period (.), even in locales that normally use a comma (,). • **Percent: (0-100) required -** the user must enter a whole number from 0 to 100. • **Zip code (U.S.)** - the user's response must consist of 5 (*nnnnn*) or 9 digits separated by a dash after the fifth (*nnnnn-nnnn*) • **Social Security number (U.S.)** - the user's response must consist of nine digits in this pattern: *nnn-nn-nnnn* • **Custom -** You can create custom validation. For more information, see "Custom Validation" on page 238. If you assign to this field any value other than **No validation**, the field is initially surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criterion, the field remains surrounded by red dashes. The system administrator determines whether or not the user can save an invalid document.

Field	Description
Caption	Enter text to describe this field on the data entry screen. It appears to the left of the field. After you insert this field, you can use Ektron's formatting capabilities to modify its size, font, color, and other attributes. Note: The Caption field only appears on this dialog when you create the Plain Text field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

Resizing a Plain Text Field

If you insert a plain text field and its width is too small or too large, you can easily resize it. To do so, follow these steps.

1. Place the cursor over the field and click. The cursor changes to a four-headed arrow, and small boxes surround the field.

2. Move the cursor to the far right of the field. (See illustration below). The cursor turns into a two-headed arrow.
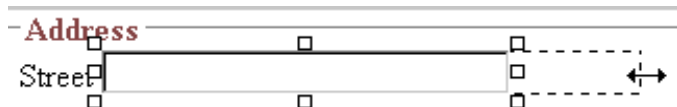
3. Drag the arrow to adjust the field width as desired.

Rich Area (　)

Use a rich area field to let a user enter a free text response that can be formatted using the editor buttons.

See Also: "Plain Text Field vs. Rich Area Field" on page 208

TIP! Unlike many other fields, the Rich Area dialog box does not prompt for a field caption. You can still enter text describing the field on the editor screen before or after you insert a Rich Area field.

Adjusting the Width of a Rich Area Field

Unlike a plain text field, the width of a rich area field cannot be adjusted. It occupies the entire screen width. If a user enters more text than fits on one line, the rich area field automatically adds more lines. To limit the width of a rich area field, place it in a table cell. In this case, the field is as wide as the cell.

If you want to insert default text into a rich area field, insert it after you place the field in the editor.

Dialog Box

Fields on the Rich Area Dialog

Field	Description
Name	Enter the name of the field.
	Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field.
	See Also: "The Name Field's Default Value" on page 206
Indexed	Check if you want to index this field.
	The **Indexed** field may or may not appear, depending on how your administrator set up your system.

Field	Description
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 236
Allow	See "The Allow Field" on page 237

Choices (≡)

Use the Choices field when you want to give the data entry user several choices. For example, you could create a Choices field named **Interests** that lists these options.

- music

- art

- sports

The data entry user could check the first two and leave the third blank.

Choices Field vs. Select List Field

The following capabilities are available with a Choices field but with not a Select List field.

- You can limit the user's choice to one item or many.

- All items appear on the screen, arranged horizontally or vertically

The following capabilities are available with a Select List field but not with a Choices field.

- The user can only select one item.

- Only the default item appears on the screen. To the right of the field, a black down arrow appears (circled in red below). The user must click the arrow to display all items and select one.
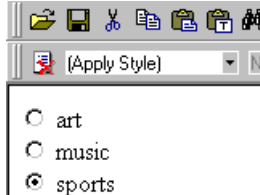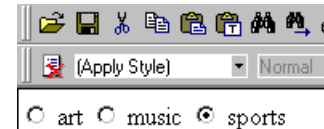
Dialog Box

Fields on the Choices Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 206

Field	Description
Indexed	Check if you want to index this field. The **Indexed** field may or may not appear, depending on how your administrator set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this choice list.
Allow selection	Click **More than one** to allow the data entry user to select more than one item on the data entry screen. Otherwise, click **Only one**. For example, if you click **More than one**, and the choices are: music, art, sports, the user could select all three choices. If you click **Only one**, the user could only select one choice.
Appearance	Click **Vertical List** to arrange the choices vertically. Click **Horizontal List** to arrange the choices horizontally.

Field	Description
Item List	This section of the screen displays the items that you enter in the **Value** and **Caption** fields. Buttons near the bottom of the screen let you remove items from this list as well as rearrange them. | Move Up	Move Down	Remove | Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox. Note that if **Only One** is selected under **Allow selection** (above), only one item can be selected.
Value	Enter the value that is collected when the data entry user selects this item. For example, if **Interests** appears in the Name field, and you want music to be collected when the data entry user selects this item and saves the page, enter **music** here.
Caption	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use Ektron **Ektron CMS200/300**'s formatting capabilities to modify its size, font, color, and other attributes. Note: The Caption field will appear on this dialog when you create or later try to edit this field.

Select List (⬛)

A Select List field is similar to a Choices field. The biggest difference is that the responses appear in a drop-down box instead of being listed separately. To see the choices, click the down arrow on the right side of the box (circled below).

See Also: "Choices Field vs. Select List Field" on page 215

For example:
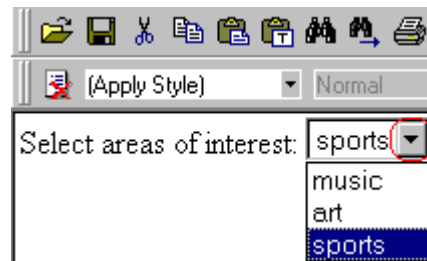
Dialog Box
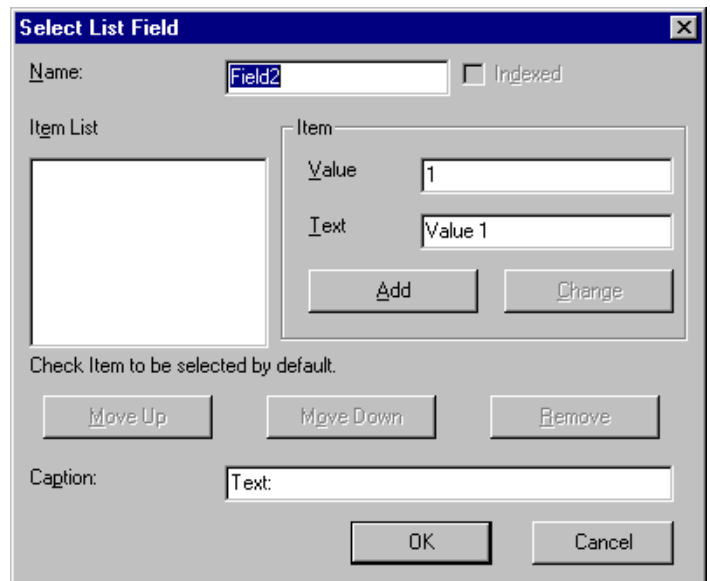
Fields on the Select List Field Dialog

Field	Description
Name	Enter the name of the field.
	Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field.
	See Also: "The Name Field's Default Value" on page 206

Field	Description
Indexed	Check if you want to index this field. The **Indexed** field may not appear, depending on how your administrator has set up your system.
Item List	This section of the screen displays the items that you enter in the **Value** and **Text** fields. Buttons let you remove items from this list as well as rearrange them. Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox.
Value	Enter the value that is collected when the data entry user selects this item. For example, if **Interests** appears in the Name field, and you want music to be collected when the data entry user selects this item and saves the page, enter **music** here.
Text	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use Ektron **Ektron CMS200/300**'s formatting capabilities to modify its size, font, color, and other attributes.
Caption	Enter text to guide the user's selection. For example, if the user needs to select an area of interest, the caption could be **Choose your interests**. Note: The Caption field only appears on this dialog when you create the Select List field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

Calculated Field ()

Use a calculated field to perform a calculation based on values in other fields. For example, if your screen collects mortgage information, you could create one field to collect the mortgage and interest payment and another to collect taxes and insurance. The calculated field could sum those two numbers and display the monthly payment.

You can validate a calculated field. For example, you can require a positive number between 100 and 1,000.

Calculated fields are display only -- users cannot edit them.

IMPORTANT! If a field will be referenced in a calculation, use the validation feature to require a value for that field. This forces the user to enter a number to be used in the calculation.

Dialog Box

Fields on the Calculated Field Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 206
Indexed	Check if you want to index this field. The **Indexed** field may or may not appear, depending on how your administrator has set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this field.
Calculation	Use this area of the screen to define the calculation that this field will perform.
Formula	Enter the calculation that this field will perform. *See Also:* "Using the Formula Field" on page 223
Select Field	Click this button to select a field to reference in the calculation. For more information, see "Using the Formula Field" on page 223.
Examples	Click on the down arrow to the right of this field to see examples of calculations you can perform. When you select an example, it is copied into the **Formula** field. Your system administrator can customize the examples. by making changes to <cmddsgcalc> command in cms_configdatadesign.asp. *See Also:* "Explanation of Examples" on page 225

Field	Description
Validation	Select the kind of validation to apply to this field. Your choices are: • **No validation** - the user's response is not checked. • **Non-negative number** - the result of the calculation must be a positive number. • **Custom -** You can create custom validation. For more information, see "Custom Validation" on page 238. If you assign to this field any value other than **No validation**, the field is surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criteria, the field remains surrounded by red dashes. Your system administrator determines if a user can save a screen with invalid data.
Caption	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use Ektron **Ektron CMS200/300**'s formatting capabilities to modify its size, font, color, and other attributes. --- Note: The Caption field only appears on this dialog when you create the Calculated field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

Using the Formula Field

You can copy a sample calculation into the **Formula** field by clicking the **Examples** field and selecting an operation from the drop down list. For example, if you click on **Examples Add two numbers (X+Y)**, **{X}+{Y}** appears in this field.
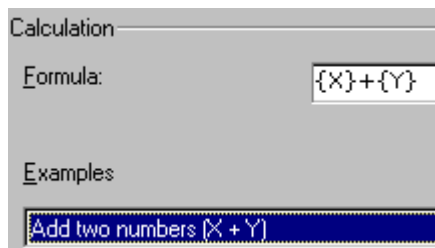
Next, replace the variables with fields on the screen. Be sure to select the curly brackets ({}) as well as the letter between them. Then, when the user enters data into those fields, the calculation is performed using the current field values.

If a calculated field tries to perform a numerical calculation with a value that is blank or contains letters, `NaN` appears in the field. (`NaN` stands for "not a number.")

If a calculated field tries to divide by zero, `Infinity` appears.

WARNING! If the user does not replace *all* variables with a field or a number, when the content is validated, validation will fail.

To do this, follow these steps.

1. Select the first variable to replace. To continue the example, select **{X}**.

2. Click the **Select Field** button. A screen appears listing appropriate fields on the Data Design screen.
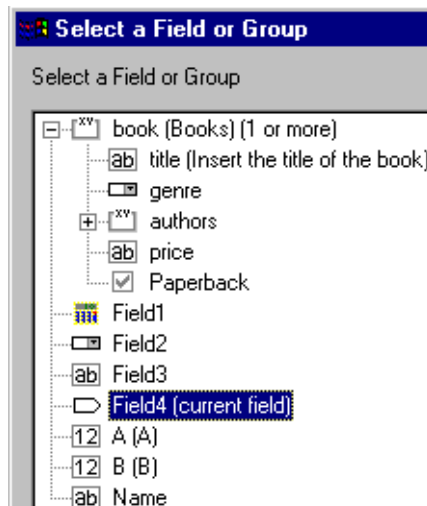
3. Select a field to replace **{X}**. When you do, the field name replaces **{X}** in the **Formula** field.

WARNING! If a variable appears more than once in a formula (for example, `{X} * number( {X} <= {Y} ) + {Y} * number( {X} > {Y})`, you only need to replace the first occurrence of it - **Ektron CMS200/300** will replace the subsequent occurrences for you.

4. Continue replacing all variables in the formula.

Notes

- If an XML document contains several occurrences of a field that is referenced in a formula, the value is derived as follows:

  - When using the XPath functions `sum()` and `count()`, all values with the field name are considered. For example, a document includes three books whose prices are $10, $20 and $30. In this case, `sum`'s value is $60.

  - When using all other functions, the first value is used. For example, a document includes three books whose prices are $10, $20 and $30. If a calculation formula refers to `<price>`, its value is $10.

- You can replace a variable with a number instead of a field. For example, replace `{X} * {Y}` with `../price * 1.15`.

- The expression can be complex, such as `(round(Field1 * 0.80) + (1 div Field2)) - 2`.

- You can use a string expression that creates a text message. For example, to calculate a full name from its parts: `concat( title, ' ', givenname, ' ', familyname)`, which could produce "Dr. Jonathan Smythe".

Referencing Other Calculated Fields

A calculated field can only reference other calculated fields that appear before it in a document. For example, a document collects a series of numbers.

- One calculated field counts the number of numbers.

- Another totals their values.

- A third computes the average by dividing the total by the count.

In this example, you must place the third field below or to the right of the first two fields. Calculated fields that are defined later in a document do not appear in the Select Field or Group dialog.

Explanation of Examples

The following table explains the standard examples that appear in the **Examples** drop-down list of the Calculated Field dialog. Note

that your system administrator can customize the list, so it may not match what is below.

Example Field Text	Example Field Formula	Description
Add two numbers	{X} + {Y}	Add the value in the first field (X) to the value in the second field (Y).
Subtract two numbers	{X} - {Y}	Subtract the value in the second field (Y) from the value in the first field (X).
Multiply two numbers	{X} * {Y}	Multiply the value in the first field (X) by the value in the second field (Y).
Divide two numbers	format-number({X} div {Y} ,'0.###')	Divide the value in the first field (X) by the value in the second field (Y).
Format as a percentage	format-number({X} div {Y} ,'#0%')	Determine what percentage one number (X) is of another (Y). For example, if {X}=10 and {Y}=100, the result of the calculation is 10%.
Absolute value of a number	{X} * (number({X} > 0)*2-1)	The number regardless of the sign (negative or positive).
Minimum of two numbers	{X} * number({X} <= {Y}) + {Y} * number({X} > {Y})	The smaller of two field values.
Maximum of two numbers	{X} * number({X} >= {Y}) + {Y} * number({X} < {Y})	The larger of two field values.
Zero if subtraction is negative	({X} - {Y}) * number(({X} - {Y}) > 0)	Subtract one number (Y) from another (X). If the difference is less than zero, insert zero.

Example Field Text	Example Field Formula	Description
Multiply by another number if checkbox is checked	`{X} * ( {Y} * number( {Z} ='true') + number( {Z} !='true'))`	X is a numeric field. Y is another numeric field to multiply by X if a checkbox is checked. Z is the checkbox. For example, {X}=2 and {Y}=3 • if the checkbox is checked, the result is 2 * 3, which is 6 • If the checkbox is not checked, the result is 2
Round a decimal number	round({X})	Rounds the number to the nearest integer. For example, `round(3.14)`. The result is 3.
Round up a decimal number	ceiling({X})	Returns the smallest integer that is greater than the number. For example, `ceiling(3.14)`. The result is 4. For negative numbers: ceiling(-3.14) = -3
Round down a decimal number	floor({X})	Returns the largest integer that is not greater than the number argument. . For example, `floor(3.14)`. The result is 3. For negative numbers: floor(-3.14) = -4
Format decimal number 0.00	format-number({X} ,'0.00')	Rounds a value either up or down to the hundredth place. As examples, 100 becomes 100.00, and 3.14159265 becomes 3.14.
Total numeric values from multiple fields	sum({X}[text()] | {Y}[text()] | {Z}[text()]))	Add the values in all referenced fields. Only elements that contain a value are summed. Empty elements are excluded.

Example Field Text	Example Field Formula	Description

Total a list of numeric values	sum({X}[text()])	Total all values in a single repeating field. Here's an example.
		
		Plain Text Field properties
		
		Name: Miles
		
		Allow: more than one
		
		Validation: non-negative whole number
		
		XML Data
		
		`<root>`
		  `<Miles>89</Miles>`
		  `<Miles>12</Miles>`
		  `<Miles>23</Miles>`
		  `<Miles>19</Miles>`
		`</root>`
		
		sum(Miles) equals
		89+12+23+19=143
		
		Only elements that contain a value are summed. Empty elements are excluded.

Example Field Text	Example Field Formula	Description

Average a list of numeric values	format-number(sum({X}[text()]) div count({X}),'0.###')	Calculate the average of all values in a single repeating field.
		
		To continue the example from the **Total a list of numeric values field** (above):
		
		Plain Text Field properties
		
		Name: Miles
		
		Allow: more than one
		
		Validation: non-negative whole number
		
		XML Data
		
		`<root>`
		`  <Miles>89</Miles>`
		`  <Miles>12</Miles>`
		`  <Miles>23</Miles>`
		`  <Miles>19</Miles>`
		`</root>`
		
		Average=89+12+23+19=143
		
		divided by the number of values (4)= 35.75
		
		Only elements that contain a value are summed. Empty elements are excluded.

Count the number of values in a list	count({X})	Calculate the number of values in a single repeating field.
		
		To continue the example from the **Total a list of numeric values field** (above):
		
		Plain Text Field properties
		
		Name: Miles
		
		Allow: more than one
		
		Validation: non-negative whole number
		
		XML Data
		
		`<root>`
		`  <Miles>89</Miles>`
		`  <Miles>12</Miles>`
		`  <Miles>23</Miles>`
		`  <Miles>19</Miles>`
		`</root>`
		
		Count = 4

Example Field Text	Example Field Formula	Description
Lowercase text	translate({X} ,'ABCDEFGHIJKLMNOPQRSTUVWXYZ','abcdefghijklmnopqrstuvwxyz')	Replace all uppercase characters with the lowercase version of that character
Uppercase text	translate({X} ,'abcdefghijklmnopqrstuvwxyz','ABCDEFGHIJKLMNOPQRSTUVWXYZ')	Replace all lowercase characters with the uppercase version of that character
Remove extra spaces	normalize-space({X})	Remove extra space characters from content\
Concatenate text	concat({X} , ', ' , {Y})	Link text strings together into a single string. For example, `concat('The',' ','XML')` yields `The XML`.
Size of a text string	string-length({X})	Count the number of characters in a selected field's value. For example, if the referenced field's value is Hello, string-length = 5.

Calendar Field ()

Insert a calendar field when you want the end user to enter a date. The user must click a date from an online, interactive calendar.

Because users cannot enter digits, a standard date format is ensured.

The date is stored as a standard XML date (in the format yyyy-mm-dd), and localized to the computer of the user viewing it.

Dialog Box

Fields on the Calendar Field Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 206
Indexed	Check if you want to index this field. The **Indexed** field may or may not appear, depending on how your administrator has set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this field.

Field	Description
Default value	If you want this screen to have a default date when the user first sees it, click the calendar icon to the right and select a date. The user can change the date in Data Entry mode.
	Note: If you enter a default date, you cannot later remove it. You can change it. If necessary, you can delete the field and enter a new one.
Use	See "The Use Field" on page 236
Allow	See "The Allow Field" on page 237
Caption	Enter text to describe this item on the data entry screen.
	After you insert this field onto the screen, you can use Ektron **Ektron CMS200/300**'s formatting capabilities to modify its size, font, color, and other attributes.
	Note: The Caption field only appears on this dialog when you create the Calendar field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

Image Only Field (⬛)

Use an ImageOnly field to place an icon on the screen, which the user in Data Entry mode can click to insert an image into the Web content. You can insert a default image if desired.

To let the user insert any file, such as a Microsoft Word document, use a File Link field. *See Also:* "File Link Field ()" on page 234

Using an Image Only Field in Data Entry Mode

In Data Entry mode, the image's caption appears, followed by a

default image (if you specify one) and this icon: ⬛. When the user clicks the icon, this screens described in "Adding a Library Asset to Your Content" on page 163 appear. See that section for more information.

The user can only insert a file whose extension is defined within the `<validext>` element of the configdatadesign.xml file. Your system administrator can help you do this.

Dialog Box

Fields on the Image Only Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|\\`~) into this field. *See Also:* "The Name Field's Default Value" on page 206
Indexed	Check if you want to index this field. The **Indexed** field may or may not appear, depending on how your administrator has set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this field.

Field	Description
Use	See "The Use Field" on page 236
Allow	See "The Allow Field" on page 237
Default Image Location	If desired, you can insert a default image, which might be the most common image or simply a reminder that an image needs to be inserted.
	To help find the image, click the **From File** button and navigate to image file.
	You can only insert an image file whose extension appears between the `<validext>` tags in the configdatadesign.xml file. For example:
	`<validext>gif,jpg,png,jpeg,jpe,doc,txt`
	`</validext>`
Caption	Enter text to describe this item on the data entry screen.
	After you insert this field onto the screen, you can use Ektron **Ektron CMS200/300**'s formatting capabilities to modify its size, font, color, and other attributes.
	Note: The Caption field only appears on this dialog when you create an Image field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

File Link Field (🖳)

Use a File Link field to place an icon on the screen which the user in Data Entry mode can use to link to any file, such as a Microsoft Word document or a .gif image file. (You can also use an Image Only field to let the user insert an image. *See Also:* "Image Only Field ()" on page 232)

Using a File Link Field in Data Entry Mode

In Data Entry mode, the file link field's caption appears, followed by

this icon: 🖳. When the user clicks on the icon, this screen prompts the user to specify a file and a caption for it.

The user can only insert a file whose extension is defined within the `<validext>` element of the configdatadesign.xml file. Your system administrator can help you do this.
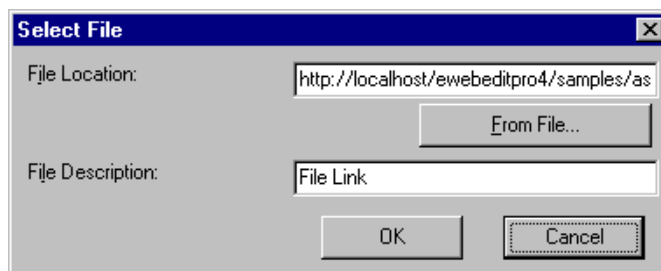
Dialog Box
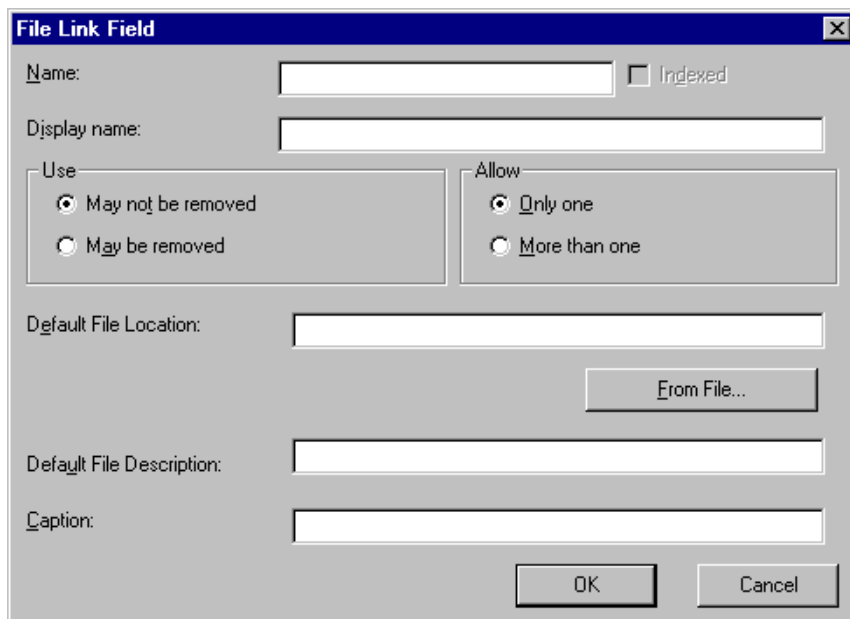
Fields on the File Link Field Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;"{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 206
Indexed	Check if you want to index this field. The indexed field may or may not appear, depending on how your administrator has set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 236
Allow	See "The Allow Field" on page 237

Default File Location	If desired, you can insert a default link, which can be the most common link or simply an example.
	
	To help find the link, click the **From File** button and navigate to file. You can only insert a file whose extension appears between the `<validext>` element of the configdatadesign.xml file. For example:
	
	`<validext>gif,jpg,png,jpeg,jpe,pdf,doc`
	`</validext>`

Default File Description	If desired, enter text that the user will be able to click on to access the linked file.

Fields that Appear on Several Dialogs

The Use Field

Click **May not be removed** if this field must be included on the screen. Otherwise, click **May be removed**.

If you check **May be removed**, when this field appears on a data entry screen, an icon (🖹) appears to the left of the field.

If the user clicks the icon, a dropdown menu provides an option to remove the field, as shown below.
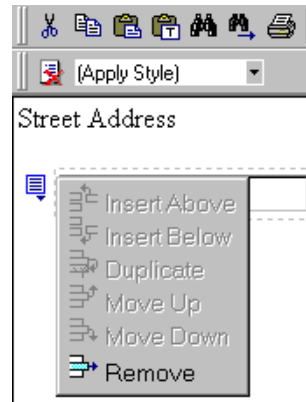
If the user removes the field, ⊞ add *field display name* replaces the field on the data entry screen to indicate that the field was removed and can be added if necessary.

For example, if the field's display name is street address, and the user removes the field, ⊞ add Street Address appears in place of the field.

NOTE The menu icon (🖳) can also indicate that the user can add instances of a field (see the Allow field, below). So, if a field is required, the icon could appear but omit a **Remove** option.

The Allow Field

Check **more than one** if you want to let the user entering data add instances of this field. Otherwise, check **only one**.

For example, if a screen is collecting names and addresses and you want to let the user enter several of them, check **more than one**.

If you check **more than one**, when this field appears in Data Entry mode, 🖳 appears to the left of the field, as shown below.
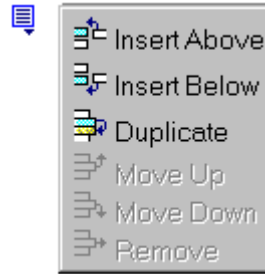
If the user entering data clicks ▤, a menu appears (shown above), which lets the user add instances of the field to the screen.

NOTE   The menu icon (▤) can also indicate that the user can remove a field (see the Use field, above). So, even if a field allows only one instance, the icon could appear but the menu would only display **Remove**.

Custom Validation

The Plain Text and Calculation field dialogs feature a validation section (illustrated below).
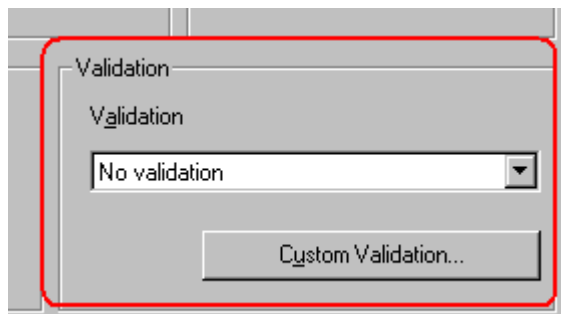
You can use the validation feature to ensure the following about the user's input.

- The data type - the default types are
    - text
    - URL
    - whole number
    - decimal number

- – floating point number (Floating point includes scientific notation, so is appropriate for scientific numbers. Decimals usually suffice for business numbers.)

Your system administrator may customize the choices.

- • The field value has one of the following relationships with another field, a number, or an expression - the default expressions are

    - – between two values (either another field or a number that you specify)

    - – less than

    - – equal to

    - – not equal to

    - – maximum length (usually for text responses)

Your system administrator may customize the choices.

If the user's response fails to meet the criteria, you can compose an error message that appears when the data does not satisfy the criterion. Your system administrator determines if a user can save the invalid data.

When the **Custom Validation** button is clicked, the Custom Validation dialog appears.

- The **Data Type** field is the value's basic type, for example, text number or URL.

- The **Condition** field displays the validation logic.

- The **Examples** drop-down list shows validation expressions that the data design creator can apply to the field.

- Any **Error Message** displays in Data Entry mode when the user inserts an invalid value.

When the **Select Field** button is clicked, the Select a Field or Group dialog appears.
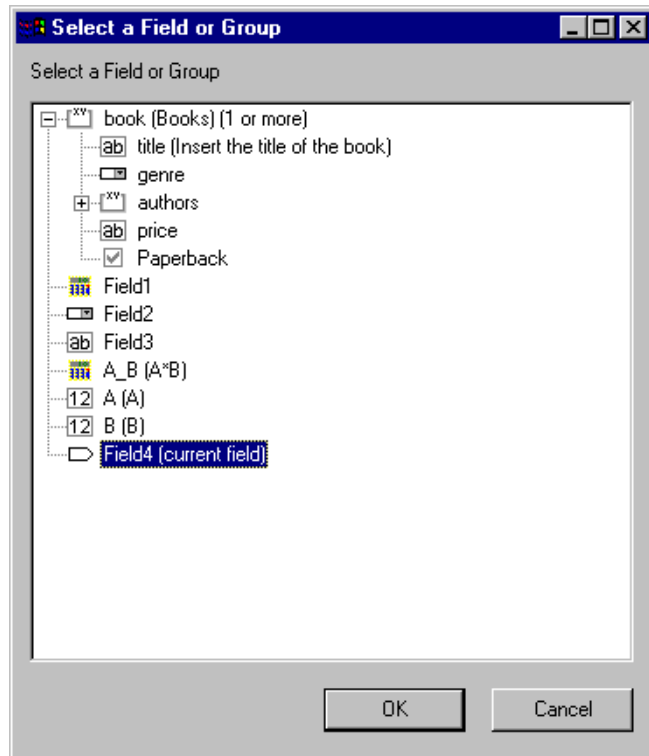
This dialog displays fields that can be inserted into the **Condition** field. Some field types, like the RichArea field, are not listed. *See Also:* "Referencing Other Calculated Fields" on page 225
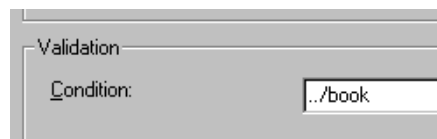
Example of Creating Custom Validation

As an example of custom validation, assume that a field collects telephone numbers, and you want to make sure the user enters 10 digits. To accomplish this, follow these steps.

1. Click on the Plain Text Field dialog and complete the screen.

2. In the validation section, click **Custom Validation**. The Custom validation screen appears.

3. In the **Data Type** field, select **Whole Number** from the drop down list. This ensures that the user can only enter digits.

4. Click the down arrow to the right of the **Examples** field to see sample logic.

5. Click **Maximum text length...** . This option lets you specify the length of the user's response.

6. `string-length(.) <= {x}` appears in the **Condition** field.

---

7. Since you want the user's input to equal 10, remove the less than sign (<) from the calculation. Now it looks like this: `string-length(.) = {X}`.

8. Replace the X with 10. Now, it looks like this: `string-length(.) = {10}`.

9. Move the cursor to the **Error Message** field and compose a relevant error message. For example: `must be 10 digits`.

10. Your screen should look like this.

11. Press **OK** and return to the **Plain Text** field dialog.

12. Press **OK** to save that dialog and test the validation on the phone number field. To do this, switch to Data Entry mode and enter more or fewer than 10 digits, as well as non-digit characters to verify that validation works as expected.

Content History

Each time a new version of a content block is published or checked-in, the previous version is stored in a history table. Old versions of a content block may be accessed in the view history table, and if desired, may be restored to the Web site.

Accessing Content History

By default, all users have the ability to view the history of a content block in the Ektron CMS200/300 application.

The content history area for a content block can be accessed from two places:

- The "View Content" page in the Workarea
- The icon menu for a content block on a Web page

Once you have accessed the content history area for a content block, regardless of how you got there, the functionality is identical.

The following sections explain how to access the content history area from both places.

Accessing the Content History from a Web page

To access the view history for a content block from a Web page, perform the following steps:

1. Begin by logging into your Ektron CMS200/300 Web site.
2. Browse to the content block you want to view the history of.

   Once you arrive to the content block, the icon menu with the available actions is displayed.

3. Click on the **View History** button( ) from the icon menu toolbar.

   The "Content History" window opens.

See "The Content History Window" on page 245 for information about managing historical versions of content.

Accessing the Content History from the Workarea

To access the content history from the Workarea, perform the following steps:

1. Navigate to the "View Content" page for the content block that you would like to view the history of.

2. Click on the **View History** button(🖺) from the toolbar.

    The "Content History" window opens.

    See "The Content History Window" on page 245 for information about managing historical versions of content.

The Content History Window

Displayed here is the "Content History" area:
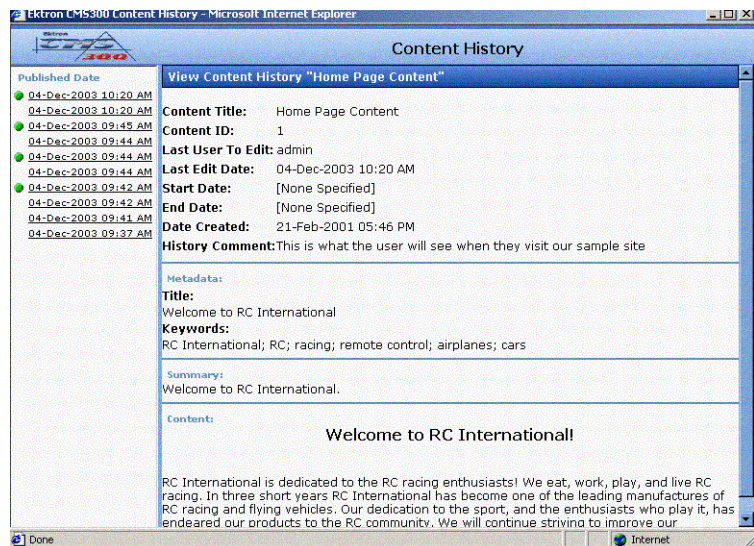
The content history page is divided into two sections:

Section	Description
Published Date	Contains links for each previously published version of the content block.
View Content History	Contains information about the historical versions, as well as the content itself.

Content History Icons

While viewing historical versions of content blocks, some versions display a green circle to the left of the date and time the record was added.
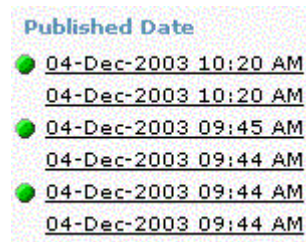
These green circles indicate that the version of the content block that corresponds with the date and time is a published version of the content.

All other records without the green circle indicate that the content was only checked-in by a user, not published.

Viewing a Previous Version

To view a previous version of the content block, click on a date and time link in the left frame.

The version of the content block that was published at that date and time will be displayed on the right side of the screen.

When viewing a historical version of a content block, three tasks can be performed, including:

Action	Button	Description	More Information
Restore		Initiated the restoration process of a historical version of a content block.	"Restoring a Previous Version" on page 248
Compare		Compares the historical version of the content block to the currently published version	"Comparing Historical Versions" on page 249
Remove XLSLT *XML Content Only*		Removes XSLT being applied to XML.	"Removing Applied XSLT" on page 247

Each of these tasks are explained in the following sections.
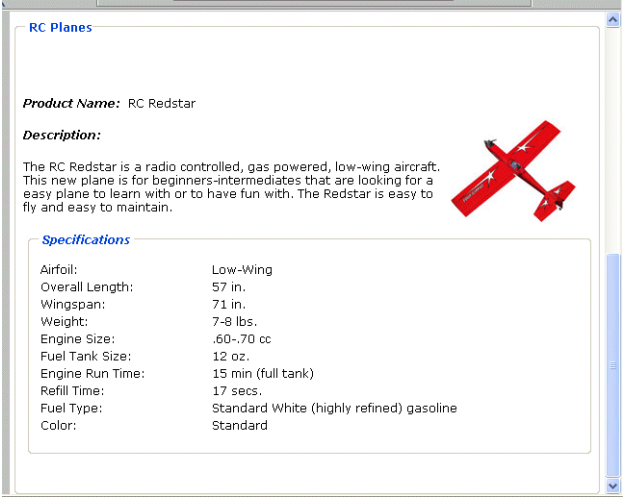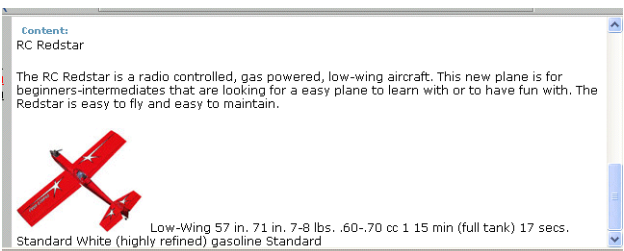
Removing Applied XSLT

NOTE   This feature is only available with Ektron CMS300. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

The removing applied XSLT option is only used when viewing historical versions of XML content blocks.

By using the remove applied XSLT option, you can choose to view the content without the irrelevant XML tags.

The following table shows the comparison.

With XSLT	
Without XSLT	

Restoring a Previous Version

1. Select a historical version of the content that you would like to restore as described in "Viewing a Previous Version" on page 246.

2. Click on the **Restore** button( ) from the toolbar.

   The content history window closes, and you are taken back to the "View Content" page, or the Web page, with the content in a checked in status.

3. If desired, check out the content to make any additional changes to the content.

4. Select the workflow you would like to perform on the content block.

Comparing Historical Versions

When you have selected a historical version of a content block to view, you may compare it to the currently published version to see the changes that have been made over time.

To compare a historical version, perform the following step:

1. Select a historical version of the content that you would like to restore as described in "Viewing a Previous Version" on page 246.

2. Click on the **View Differences** button( ) from the toolbar.

The historical version and the currently published version are compared in eWebDiff.

NOTE   See "Redlining" on page 476 for additional information about using eWebDiff.

Managing Tasks

The tasks folder in the Workarea contains all assigned tasks in the Ektron CMS200/300 Web site.

Within Ektron CMS200/300, users can assign task to other users. Tasks may include, but not limited to, the following:

- Updating content
- Publishing a content block
- Updating an image
- Reordering a collection

A standard Ektron CMS200/300 user only sees tasks that are either assigned to or by themselves, however, as an Administrator, you can view all tasks regardless of who they are assigned to or by.

This chapter explains how to access, manage, and assign tasks.

Accessing the Tasks Folder

To access the tasks folder, perform the following steps:

1. Log in to your Ektron CMS200/300 Web site and access your Workarea.

2. In the folder tree on the left side of the Workarea, click on the **Smart Desktop** icon from the Navigation buttons bar from the top of the toolbar.

3. The folder hierarchy of the Smart Desktop folder is displayed.

4. Click on the Tasks folder to view its content.

The "View Tasks Assigned By and To [Your Name]" window is displayed.
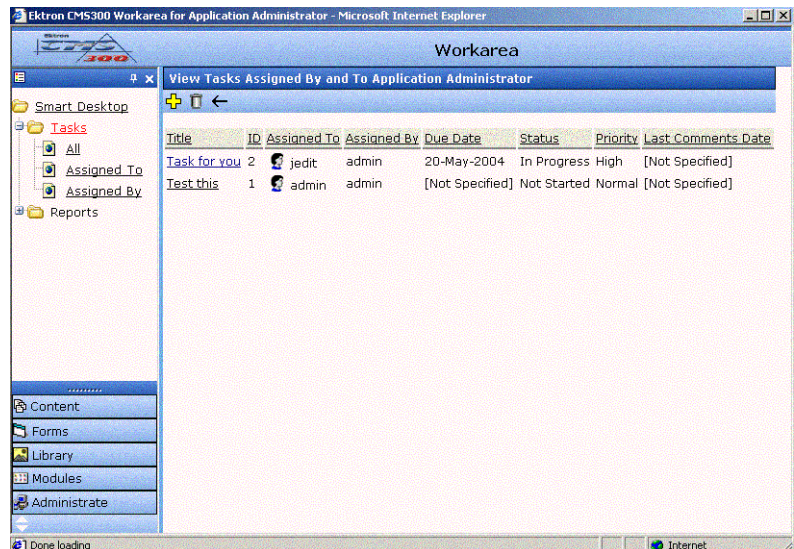
From this page, you can view, update, or add tasks.

Sorting Tasks

On the view tasks page in all task sub-folders, you may sort the information by each displayed column.

Information can be sorted by:

Column	Description
Title	Sorts tasks alphabetically by title.
ID	Sorts task by ID number.
Assigned To	Sorts tasks alphabetically by username task is assigned to.
Assigned By	Sorts tasks alphabetically by username the tasks were assigned by.
Due Date	Sorts tasks by the date the tasks are due beginning with the earliest.

Column	Description
Status	Sorts tasks alphabetically by status of the task.
Priority	Sorts tasks alphabetically by the priority of the task.
Last Comments Date	Sorts tasks by the date the last comment was added for the task beginning with the earliest.

Task Module Folders

Beneath the main task module folder, there are three sub-folders that contain filtered task information. The following table explains the contents of each task sub-folder.

Folder	Description
Tasks	Displays all tasks assigned by and to you.
All	Displays all tasks within the Ektron CMS200/300 Web site.
Assigned To	Displays all tasks assigned to you.
Assigned By	Displays all tasks that you have assigned to other users or user groups.

Task Module Toolbar

The following table displays and explains each of the toolbar buttons that you can use while managing tasks.

Button	Name	Description	More Information
	Add Comment	Allows you to add a comment to the task.	"Adding Comments to Tasks" on page 256

Button	Name	Description	More Information
	Add Task	Accesses the add task section from the view content page.	"Assigning Tasks to a Content Block" on page 78
	Add Task	Accesses the add task section from the task module folder.	"Creating Tasks" on page 254
	Back	Returns you to the previous page.	
	Calendar	Opens a calendar to allow you to select a date.	
	Delete Task	Deletes a specified task.	"Deleting Tasks" on page 257
	Edit Task	Allows you to edit a selected task.	"Editing a Task" on page 255
	Save	Saves the task information.	
	Update	Saves and updates the task information.	
	View Task	Views the task information.	

Creating Tasks

To create a task from the task module folder, perform the following steps:

1. Access your Tasks folder in your Workarea as described in "Accessing the Tasks Folder" on page 250.

2. Click on the **Add** button( ) from the toolbar.

   The "Add Task" page is displayed.

3. Enter the necessary information for the task using the following table as a reference.

Field	Description
Title	Specify a title for the task (for example, Update Content)
Assigned To	Choose the user or user group you would like to assign the task to. An email is sent to the selected user or user group. Email will only be sent to the user or user group only if email notification is enabled for the application.
Priority	Specify the priority of the task.
Status	Choose a status for the task.
Due Date	Using the calender button, choose the date the task needs to be completed by.
Start Date	Using the calendar button, choose a start date for the task.
Description	Add additional information about the task.

4. Click on the **Save** button( ) from the toolbar.

   If email notification is enabled, an email is sent to the user/user group the task has been assigned to and the "View Tasks

Assigned By and To [Your Name]" page is displayed with the added task displayed.

Viewing the Task

Once a task has been added to the Ektron CMS200/300 Web site, with the exception of Administrators, the only users who able to view the task are the users the task was assigned to and the user who assigned the task.

To view a task, perform the following steps:

1. Access the Tasks module folder as described in "Accessing the Tasks Folder" on page 250.

   A list of all tasks added to Ektron CMS200/300 is displayed.

2. Click on the title of the task that you would like to view.

   The "View Task" page is displayed.

From the view task page, you can perform many tasks including:

- "Editing a Task" on page 255
- "Deleting a Single Task" on page 257
- "Adding Comments to Tasks" on page 256

Editing a Task

Editing a task allows you to change information regarding the task including relevant information such as:

- Title
- Assigned to
- Priority
- Status
- Due Date
- Start Date
- Description

To edit a task, perform the following steps:

1. Access the view task page for the task you would like to edit as described in "Viewing the Task" on page 255.

2. Click on the **Edit** button( ) from the toolbar.

   The "Edit Task" page is displayed.

3. Make the necessary changes to the task.

4. Click on the **Update** button( ) from the toolbar to save the changes.

   The updated task information is saved, and the updated "View Task" page is displayed.

Adding Comments to Tasks

Comments can be added to tasks by Ektron CMS200/300 users to provide additional information about the task.

To add a comment to a task, perform the following steps:

1. Begin by accessing the view task page for the task you would like to add a comment to as described in "Viewing the Task" on page 255.

2. Click on the **Add Comment** button( ) from the toolbar.

   The "Ektron CMS200/300 Comments" window is displayed.

3. Enter your comment in the editor.

4. Click on the **Insert** button(Insert).

   The comment is added to the task, and the "View Task" page is displayed with the comment displayed in the comments table at the bottom of the page.

Updating Comments

To update a comment that has been added to a task, perform the following steps:

1. Access the view task page that contains the comment you wish to update as described in "Viewing the Task" on page 255.

2. Click on the **Date/Time** link of the comment you would like to update.

   The "Ektron CMS200/300 Comments" window opens with the current comment displayed.

3. Make the necessary changes to the comment.

4. Click on the **Update** button(Update).

   The comment is updated, and the "View Task" page is displayed with the updated comment displayed in the comments table.

Deleting Tasks

Tasks no longer relevant or needed can easily be deleted from the Web site.

Similar to content, tasks can either be deleted one at a time, or several at once. The following section explains each scenario.

Deleting a Single Task

To delete a single task, perform the following steps:

1. Access the view task page for the task you would like to delete as described in "Viewing the Task" on page 255.

2. Click on the **Delete** button(🗑) from the toolbar.

   A confirmation message is displayed.

3. Click **OK**.

   The task is deleted from the Web site and the "View Tasks" page is displayed with the deleted task removed.

Deleting Multiple Tasks

To delete multiple tasks at once, perform the following steps:

1. Access the view all tasks page as described in "Accessing the Tasks Folder" on page 250.

2. Click on the **Delete** button(🗑) from the toolbar.

   The "Delete Tasks Assigned by and To [Your Name]" page is displayed.

3. Check off the boxes next to the tasks that you would like to delete.

NOTE   Checking off the box in the table header will select or deselect all tasks.

4. Click on the **Delete** button(🗑) from the toolbar to delete the tasks.

   A confirmation message is displayed.

5. Click **OK**.

   The selected tasks are deleted and the "View All Tasks" page is displayed with the deleted tasks removed from the table.

Content Reports

The reports folder contains various content and collection related reports to assist you. Displayed below is a list of the reports for Ektron CMS200/300.

- "Approvals Report" on page 261
- "Checked In Report" on page 264
- "Checked Out Report" on page 265
- "New Content Report" on page 267
- "Submitted Report" on page 268
- "Content Pending Start Date Report" on page 269
- "Expired Content Report" on page 270

This chapter explains how to access the reports folder in your Workarea, as well as explain how to use them.

Accessing Reports Folder

To access your reports folder, perform the following steps:

1. Log in to your Ektron CMS200/300 Web site and access your Workarea.

2. In the folder tree on the left side of the Workarea, click on the **Smart Desktop** icon from the navigation buttons toolbar at the

   top.

3. Smart Desktop folder hierarchy is displayed.

4. Maximize the **Smart Desktop** folder, then click on the **Reports** folder.

   A list of available reports are displayed

5. Click on any report to view its contents.

The following sections explain each of the content reports and the actions that can be performed when viewing each of them.

Sorting and Filtering Within Content Reports

In each of the content reports, you may sort and filter the data that is displayed. These include:

- Sorting by column
- Filtering by user
- Filtering by content folder

Sorting and filtering in each of the content reports is identical. The following section gives examples of how to sort and filter data in the content reports, using the checked-in content report as an example.

Sorting by Column

Each column heading contains a link to allow you to sort the data by the respective column. By clicking on one of the links, you will be able to sort the data by

- Title
- ID
- Last editor
- Date Modified

Filter by User

By clicking on the name of an editor (user) in the table, you will only display content that was checked in by that user.

To sort by user, perform the following steps:

1. Begin by accessing any content report.
2. Click on the name of the user you would like to narrow the list by.

   The table now only displays the content blocks that the selected user has checked in.

3. Click on the **Back** button(←) from the toolbar to return to the original table.

Filter by Content Folder

Similar to sorting by user, you have the ability to view only content that has been checked in to a specific folder.

To sort by content folder, perform the following steps:

1. Begin by accessing any content report table.
2. Click on the content folder path you would like to narrow the list by.

   The table now only displays the content blocks that are checked in to the specified folder.

3. Click on the **Back** button(←) from the toolbar to return to the original table.

Approvals Report

Each content block that is awaiting to be approved by you will be inserted into this report. This report gives you, or any other approver, the ability to have a central location of all content blocks awaiting your approval, without having to go searching through many folders.

Each time a user with approval permissions accesses his or her workarea, they can just click on the Approvals reports, see if they have any content blocks awaiting their approval, and continue with the proper workflow.

This chapter will highlight the features of the Approvals Folder.

Accessing the Approvals Report

To access the approvals report, perform the following steps:

1. Begin by accessing the **Reports** folder in your Workarea as described in "Accessing Reports Folder" on page 259.

   A list of all reports is displayed.

2. Click on **Approvals.**

   The "View All Content Awaiting Approval" page is displayed.

   From the main approvals page, you will see information about all the content blocks awaiting your approval including:

Field	Description
Title	This is the title of the content block.
Request Type	Displays the request that has been made to the content block. Either **Publish** or **Delete.**
Start Date	Displays the start date, if any, that has been assigned to the content block to go live on the web site.
Submitted By	This is the user that has made the request for approval.
Path	Location in the content folder where the content block is located.

From here, you will be able to approve or decline all content blocks that have been submitted to you.

Approving/Declining Content Blocks

As stated earlier, you will be able to approve and decline all the content blocks that have been submitted to you from the approval folder. The steps shown below will guide you on approving or declining these content blocks.

Approve/Decline One Content Block

1. Begin by accessing your approvals report in the Workarea.

2. Click on the title of the content block from the approval table you wish to approve/decline.

   The "View Content Awaiting Approval" page is displayed.

3. Perform an action using the following table as a reference.

Button	Name	**Description**
	Publish	Click this button to accept the changes to the content block and publish it to the site. Note: If there is another approver in the approval chain for the content, this will be replaced by a **SUBMIT** button.
	Decline	Click this button to reject the changes and keep the current version of the content block live on the Web site.
	Edit	Click this button to check-out the content block and make changes to it if desired.
	View Published/ Staged	Clicking these buttons will toggle between the current published version of the content block, and the submitted version. This can aid in comparing the differences between them.
	Back	Click this button to go back to the previous screen.

Approving Multiple Content Blocks

The approvals table allows you to select some or all of the submitted content blocks, and submit them all together.

To approve multiple submitted content blocks, perform the following steps:

1. Begin by accessing your "Approvals Report" in the Workarea.

2. Check off the boxes next to the content blocks you wish to approve.

NOTE   Click **Select All** or **Clear All** to either check off all content blocks, or uncheck all content blocks.

---

3. Click on the **Approve All** button( ) from the toolbar.

    A confirmation message is displayed.

4. Click **OK**.

    The selected content blocks are either submitted to the next publisher, published immediately to the Web site, or deleted, depending on the approval chain set for each of the content blocks.

Checked In Report

The checked in content report displays all the content blocks in your Ektron CMS200/300 Web site that are currently in a checked in state.

Accessing Your Checked-In Content Report

To view the checked in report, perform the following steps:

1. Begin by accessing the **Reports** folder in your Workarea as described in "Accessing Reports Folder" on page 259.

    A list of all reports is displayed.

2. Click on **Checked In Content Report**.

    The checked in content report is displayed. Each item on the list contains the following information

Column	Description
Title	Title given to the content block by the content creator.
ID	ID number assigned to the content block by Ektron CMS200/300.
Last Editor	Last and first name of the last user to edit the content block.
Date Modified	Date and time the content block was last edited.
Path	Folder location of the content block in the Ektron CMS200/300 Web site.

Submitting Multiple Content Blocks

As an administrator, you have the ability to select some, or all, of the content blocks that are displayed in the checked in report table. Once selected, you may submit them to be either approved or published, depending on the approval chain they belong to.

To submit multiple checked in content blocks, perform the following steps:

1. Begin by accessing the "Checked-In Content Report" as described in "Accessing Your Checked-In Content Report" on page 264.

   All checked-in content blocks are displayed.

2. Select the checked in content blocks you would like to submit.

NOTE   Click **Select All** or **Clear all** to check, or uncheck, all displayed checked in content blocks.

3. Click on the **Submit** button(🗒) from the toolbar.

   A confirmation message is displayed.

4. Click **OK**.

   The selected content blocks that were are submitted will either go to the next approver on the respective approval chain, or be immediately published to the Web site.

Checked Out Report

The checked out content report displays all the content blocks in your Ektron CMS200/300 Web site that are currently in a checked out state.

Accessing Your Checked Out Content Report

To view the checked out report, perform the following steps:

1. Begin by accessing the **Reports** folder in your Workarea as described in "Accessing Reports Folder" on page 259.

   A list of all reports is displayed.

2. Click on **Checked Out Content Report**.

The checked out content report page is displayed. Each item on the list contains the following information

Column	Description
Title	Title given to the content block by the content creator.
ID	ID number assigned to the content block by Ektron CMS200/300.
Last Editor	Last and first name of the last user to edit the content block.
Date Modified	Date and time the content block was last edited.
Path	Folder location of the content block in the Ektron CMS200/300 Web site.

Checking In Multiple Content Blocks

As an administrator, you have the ability to select some, or all, of the content blocks that are displayed in the checked out report table. Once selected, you may check them in.

To check in multiple checked out content blocks, perform the following steps:

1. Begin by accessing the "Checked Out Content Report" as described in "Accessing Your Checked Out Content Report" on page 265.

All checked out content blocks are displayed.

2. Select the checked out content blocks you would like to check in.

NOTE Click **Select All** or **Clear all** to check, or uncheck, all displayed checked out content blocks.

3. Click on the **Check-In** button( ) from the toolbar.

A confirmation message is displayed.

4. Click **OK**.

The selected content blocks are now checked in.

New Content Report

The new content report displays all the content blocks in your Ektron CMS200/300 Web site that are in a new state. New content blocks are content blocks that have been created and saved, but have never been published.

Accessing Your New Content Report

To view your new content report, perform the following steps:

1. Begin by accessing the **Reports** folder in your Workarea as described in "Accessing Reports Folder" on page 259.

   A list of all reports is displayed.

2. Click on **New Content Report**

   The new content report page is displayed. Each item on the list contains the following information

Column	Description
Title	Title given to the content block by the content creator.
ID	ID number assigned to the content block by Ektron CMS200/300.
Last Editor	Last and first name of the last user to edit the content block.
Date Modified	Date and time the content block was last edited.
Path	Folder location of the content block in the Ektron CMS200/300 Web site.

Submitted Report

The submitted content report allows you to view all the content blocks in your Ektron CMS200/300 Web site that are in a submitted state.

Accessing Your Submitted Content Report

To view the submitted report, perform the following steps:

1. Begin by accessing the **Reports** folder in your Workarea as described in .

    A list of all reports is displayed.

2. Click on **Submitted Content Report**

    The submitted content report page is displayed. Each item on the list contains the following information

Column	Description
Title	Title given to the content block by the content creator.
ID	ID number assigned to the content block by Ektron CMS200/300.
Last Editor	Last and first name of the last user to edit the content block.
Date Modified	Date and time the content block was last edited.
Path	Folder location of the content block in the Ektron CMS200/300 Web site.

Viewing Position in Approval Chain

While viewing the submitted content reports, you are able to view where a content block is in its respective approval chain.

To view the position in an approval chain, perform the following steps:

1. Begin by accessing the "Submitted Content Report" table as described in "Accessing Your Submitted Content Report" on page 268.

2. Click on the title of the content block you wish to view the position of in the approval chain.

   The "View Content" page is displayed.

   The position of the content block in the approval chain is denoted by the red text on the approvals line.

3. Click on the **Back** button(←) from the toolbar to return to the original table.

Content Pending Start Date Report

The pending start date report allows you to view all content blocks in your Web site that have been approved, but their start dates haven't occurred.

Accessing Your Pending Start Date Report

To view the pending start date report, perform the following steps:

1. Begin by accessing the **Reports** folder in your Workarea as described in "Accessing Reports Folder" on page 259.

   A list of all reports is displayed.

2. Click on **Content Pending Start Date Report.**

   The content pending start date report page is displayed. Each item on the list contains the following information

Column	Description
Title	Title given to the content block by the content creator.
ID	ID number assigned to the content block by Ektron CMS200/300.
Last Editor	Last and first name of the last user to edit the content block.
Start Date	Date and time the content block will go live on the Web site.

Column	Description
Path	Folder location of the content block in the Ektron CMS200/300 Web site.

Viewing Content Pending a Start Date

You may view any content block that is part of the pending start date content report.

To view a content block pending a start date, perform the following steps:

1. Begin by accessing the "Pending Start Date Content Report" table as described in "Accessing Your Pending Start Date Report" on page 269

2. Click on the title of the content block you would like to view.

   The "View Content" page is displayed.

3. Using the toolbar at the top of the page, you may perform any action available

4. Click on the **Back** button(←) from the toolbar to return to the original table.

Expired Content Report

The expired content report allows you to view all the content blocks that are currently expired.

Accessing Your Expired Content Report

To view the expired content report, perform the following steps:

1. Begin by accessing the **Reports** folder in your Workarea as described in "Accessing Reports Folder" on page 259.

   A list of all reports is displayed.

2. Click on **Expired Content Report**

   A table of all expired content blocks is displayed. Each item on the list contains the following information

Column	Description
Title	Title given to the content block by the content creator.
ID	ID number assigned to the content block by Ektron CMS200/300.
Last Editor	Last and first name of the last user to edit the content block.
End Date	Date and time the content block expired.
Path	Folder location of the content block in the Ektron CMS200/300 Web site.

Viewing Expired Content

You may view any content block that is part of the expired content report.

To view an expired content block, perform the following steps:

1. Begin by accessing the "Expired Content Report" table as described in "Accessing Your Expired Content Report" on page 270.

2. Click on the title of the content block you would like to view.

   The "View Content" page is displayed.

3. Using the toolbar at the top of the page, you may perform any action available

4. Click on the **Back** button(←) from the toolbar to return to the original table.

Content Collaboration

When editing Web site content with the editor supplied with Ektron CMS200/300, you can add comments to the content that you are working on.

In addition to just being able to add comments, other users can also make comments on the same comments that you have made. This concept is know as "Content Collaboration."

Similar to other word processing programs, comments can be added, updated, and tracked to understand the changes that are being made.

This section explains how to utilize the content collaboration feature.

Adding Comments to Content

Let's begin by simply adding a comment within a content block already created in Ektron CMS200/300.

To add a comment within a content block, perform the following steps:

1. Invoke the editor by editing an existing content block.

NOTE You cannot add a comment to a new content block. This is because in order to associate a comment to a content block you need a content ID for that content. Which does not exist till you save or publish a content at least once.

2. In the editor field, place your cursor in the location where you would like to insert the comment.

3. On the *editor* toolbar, click **Insert Comment** button( ).

   The "Ektron CMS Comment" window opens.

4. Type in your comment using the toolbar to format the text if desired.

5. Click on the **Insert** button(Insert).

   The comment is saved and added to the comment table.

6. Click on the **Close** button to close the comment window.

   The comment window closes and a comment icon is placed where the comment was added to the content.
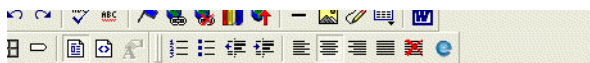
7. Repeat steps 3-6 to add more comments to the content.

Viewing a Comment

Once a comment has been created and inserted into a content block, it can be viewed by any user who is able to edit the content block.

To view a comment that has been inserted, perform the following steps:

1. Begin by editing the content block that contains the comment that you would like to view.

2. Locate the comment icon within the content block.

3. View the comment(s) associated with the comment icon by either:

   – Double-clicking on comment icon within the content

   – Clicking on the comment icon, then clicking on the comment button on the editor's toolbar.

   The "Ektron CMS Comments" window opens.

   Each comment that has been added is displayed in the table at the top of the window.

From this window, you can add another comment and update an existing comment. See the next section for more details.

What Happens When Content is Saved?

When a content block that contains comments is saved, saved and checked-in, or saved and published, only the visible content is displayed on the Web page.
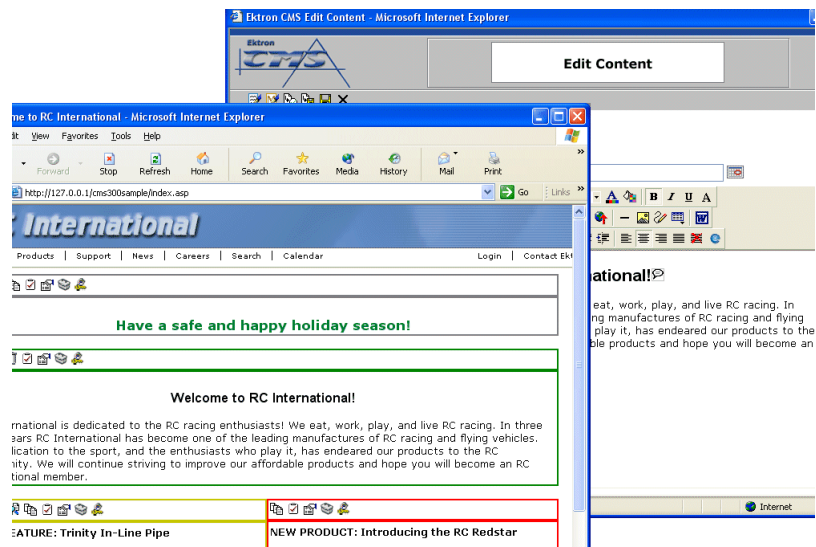
To view the comments that have been inserted into a content block, you must edit the content block that contains the comments, and there you can view the comments.

Comment Management

Once a comment has been inserted into a content block, users who have edit permissions on the content block can view the comment that you have added.

Also, they can add another comment to the existing comment to further explain certain details about it.

This section explains the actions relevant to content comments, that can be performed.

Viewing a Comment

To view a comment that has been inserted into a content block, see "Viewing a Comment" on page 273.

Adding Another Comment

To add an additional content to an existing comment, perform the following steps:

1. Access the view comment window for the comment that you would like to add another comment to as described in "Viewing a Comment" on page 273.
2. Type in the comment in the editor provided, using the toolbar to format the text as needed.
3. Click on the **Insert** button(Insert)**.**

   The comment is saved and added to the top row of the comment table.
4. Repeat steps 1-3 to add additional comments throughout the content block.
5. Click on the **Close** button to close the comments window.

Updating an Existing Comment

Updating a comment allows you to make changes to an existing comment in the event that information has changed.

To update an existing comment, perform the following steps:

1. Access the view comments window for the comment that contains that comment that needs to be updated.

2. Click on the **Date/Time** link of the comment you would like to edit.

   The comments editor opens with the selected comment inserted in it.

3. Make the necessary changes to the comment.

4. Click on the **Update** button(Update) to save and update the comment.

   The "Ektron CMS Comments" window is refreshed and the comment table is updated with the updated comment.

5. Click on the **Close** button to close the comments window.

Collections

Collections are used to create navigation systems for your Web site which can be maintained by any Ektron CMS200/300 User.

The following chapter explains how to use collections within Ektron CMS200/300.

Accessing the Collections Page

To access the collections page for a content folder, perform the following steps:

1. Click on any content folder in your Workarea.

   The contents of the content folder are displayed.

2. Click on the **View Collections** button(🖺) from the toolbar.

   The "View Collections" page is displayed.

Collection Reports

The collection reports page allows you to view a list of all collections that have been created.

NOTE   You can perform any task on a collection from the collection reports page except ADD.

To view the collection reports, perform the following steps:

1. Access your Workarea.
2. Click on the **Modules** folder buttons in the left frame of the workarea window.
3. Click on the **Collections** folder under the Modules folder tree.

   A table of all collections is displayed.

Before You Work With Collections…

This section explains conceptual and background information that is useful to know before you begin to work with collections.

Collection Permissions

Permissions for collections are set in the content folder permissions table, in the advanced permissions section.

By default, administrators have permissions to perform any collection related task. However, basic users can be given the permissions to manage collections as well.

See "Standard & Advanced Permissions" on page 85 for more information.

Collections Toolbar

When working with collections, there are several tool bars and toolbar buttons that you should become familiar with. The following table displays a list of all the toolbar buttons that you will come across when working with collection menus.

Button	Name	Description	More Information
	Add	Initiates the process of adding a new collection menu, or is used to add content block to an existing collection menu.	"Creating Collections" on page 280
	Add Content	Enables you to add a content block to Ektron CMS200/300 from the collections area.	"Adding Content Blocks to the Collection" on page 284
	Remove	Allows you to remove a content block from an existing collection menu.	"Removing Content Blocks from the Collection" on page 285
	Reorder	This button allows you to reorder the group of content blocks in a collection menu.	"Reordering List of Links" on page 285

Button	Name	Description	More Information
	Edit	Allows you to edit certain information of a collection menu.	"Editing a Collection" on page 286
	Delete	Used to delete an existing collection menu.	"Deleting a Collection" on page 287
	Save	Used to save changes that were made.	
	Update	Used to save and update changes.	
	Back	Takes you to the previous page.	

Default Template vs. Quicklinks

As stated earlier, you may specify a default template for a collection that is used when the links for a collection are generated. If desired, you may disable a default template, and force the links generated with the collection to use the quicklinks that are automatically assigned to the content blocks by Ektron CMS200/300.

Links using a default template:

Title	ID	URL Link
Home Page Content	1	/CMS300Sample/index.asp?id=1
Support Page	8	/CMS300Sample/index.asp?id=8
Plastic Molder #123	13	/CMS300Sample/index.asp?id=13
RC Cheetah	5	/CMS300Sample/index.asp?id=5
RC Redstar	7	/CMS300Sample/index.asp?id=7
New Content Block	17	/CMS300Sample/index.asp?id=17
Contact Ektron	15	/CMS300Sample/index.asp?id=15

Links using quicklinks:

Title	ID	URL Link
Home Page Content	1	/CMS300Sample/index.asp?id=1
Support Page	8	/CMS300Sample/index.asp?id=8
Plastic Molder #123	13	/CMS300Sample/hr.asp?id=13
RC Cheetah	5	/CMS300Sample/products.asp?id=5
RC Redstar	7	/CMS300Sample/products.asp?id=7
New Content Block	17	/CMS300Sample/index.asp?id=17
Contact Ektron	15	/CMS300Sample/index.asp?id=15

To toggle between a default template an quicklinks:

1. Access the edit collection page for the collection you wish to edit.
2. In the default template field, remove the template.
3. Click the save button

Creating Collections

Creating collections for your Web site involves two steps:

- Adding the collection.
- Assigning content blocks to the collection.

The following section will explain each of these steps.

Adding a Collection

To add a new collection for your Web site, follow the steps listed below:

1. Begin by accessing the collections table for a content folder as described in "Accessing the Collections Page" on page 277.

2. Click on the **Add** button( ) from the toolbar.

   The "Add Collection" page is displayed.

3. Complete the add collection form using the following table as a reference.

Field	Description
Title	Assign a unique title to the new collection.
Template	Enter the default template for the collection. This template will be used to display the content of the links generated if no template is assigned in the custom function. If left blank, the links will use their respective quicklinks.
Description	Add a more detailed description for the collection menu that will be added.
Include Sub-folders	Check off if you would like to add content blocks that belong to sub folders of the content folder to the collection.

4. Click on the **Save** button( ) from the toolbar to save the changes.

   The page is refreshed, and the updated collections table is displayed.

   With the collection added, you may now assign content blocks to it.

Assigning Content Blocks to the Collection

Once the collection has been created, you will now need to assign the content blocks to it.

To assign content blocks to the collection, follow these steps:

1. Begin by accessing the collection page, in the content folder, you wish to assign content blocks to.

2. Click on the title of the collection you would like to assign content blocks to.

   The "View Collection" page is displayed

3. Click on the **More Info** link to view the properties for the collection.

4. Click on the **Add** button(➕) from the toolbar.

   The "Add Items to Collection" page is displayed.

5. Check off the boxes next to the content block titles you would like to include with your collection.

   The following table will assist you with available options when assigning content blocks to the collection:

Button	Function
➕	Add selected content block(s) to collection.
🗋	Adds a new content block to be added to the collection.
📁	Displays contents in sub-folder.
📁 ..	Displays content is parent folder.

6. Click on the **Add** button(➕) from the toolbar to add content blocks to the collection.

   The page is refreshed and the updated collection information is displayed.

Viewing a Collection

Once a collection has been created, you will be able to view it in the Workarea.

To view a collection, perform the following steps:

1. Begin by navigating to the content folder that contains the collection that you would like to view.

2. Click on the **View Collections** button(📇) from the toolbar.

   The "View Collections" page is displayed.

3. Click on the title of the collection you would like to view.

   The "View Collection" page is displayed.

4. Click on the **More Info** link to view the properties of the collection.

   Each field displayed is explained in the following table:

Field	Description
Title	Title assigned to the collection.
ID	ID assigned to the collection by Ektron CMS200/300. This will be used to call the collection to the Web page.
Template	Default template the generated links will display the content on. Only used if no template is assigned in the custom function.
Last User to Edit	Name of the user who last made changes to the collection.
Last Edit Date	Date and time the collection was last edited.
Date Created	Date and time the collection was originally created.
Description	Detailed description about the collection.
Include Sub-folders	Check box to tell whether the collection includes items from the sub folders of the content folder or not.
Links	List of links that will be displayed in the collection menu.

Along with all the information about the collection, there are also several tasks that may be performed from this page. The following table will describe each button and it's function.

Button	Name	Description	More Information
	Add	Adds another content block to the list of links in the collection menu.	"Assigning Content Blocks to the Collection" on page 281
	Remove	Removes a content block that has been added to a collection menu.	"Removing Content Blocks from the Collection" on page 285
	Reorder	Allows you to reorder the list of links that are displayed in the collection menu.	"Reordering List of Links" on page 285
	Edit	Allows you to edit certain information about the collection menu.	"Editing a Collection" on page 286
	Delete	Deletes the collection menu.	"Deleting a Collection" on page 287
	Back	Takes you to the previous page.	

Adding/Removing Content Blocks

Once a collection has been created, you can add or remove content blocks to and from it.

Adding Content Blocks to the Collection

For information about adding content blocks to the list of links in the collection menu, see "Assigning Content Blocks to the Collection" on page 281.

Removing Content Blocks from the Collection

To remove content blocks from a collection, perform the following steps:

1. Begin by accessing the collection you would like to remove a content block from as described in "Viewing a Collection" on page 282.

2. Click on the **Remove** button(🟨) from the toolbar.

   The "Remove Items From Collection" page is displayed.

3. Check off the boxes next to the titles you would like to delete from the collection.

NOTE   You may click on **Select All** or **Clear All** to either check off all the boxes or remove all check marks.

4. Click on the **Delete** button(🗑) from the toolbar to delete the content blocks from the collection menu.

   The page is refreshed, and the updated collection information is displayed.

Reordering List of Links

When a collection is created, and more than one content block is assigned to it, you will have the option to order the list of links.

To reorder the list of links, perform the following steps:

1. Begin by navigating to the collection that contains the content blocks you wish to reorder as described in "Viewing a Collection" on page 282.

2. Click on the **Reorder** button(🔼) from the toolbar.

   The "Reorder Collection" page is displayed

3. Click on the title of the content block you would like to reorder from the list.

4. Click on the **Up** (▲) or **Down** (▼) arrow to move the content block in the respective direction.

5. Repeat steps three and four until you have set the desired order.

6. Click on the **Update** button(🔲) from the toolbar to save the changes.

   The page is refreshed, and the updated collection is displayed.

Editing a Collection

To edit a collection, perform the following steps:

1. Begin by navigating to the collection you wish to edit as described in "Viewing a Collection" on page 282.

2. Click on the **Edit** button(🔲) from the toolbar.

   The "Edit Collection" page is displayed.

3. Make the necessary changes to the collection information. Use the following table for assistance.

Field	Description
Title	Title used to reference the collection in the workarea.
Template	Default template used when generating the links for the content blocks in the collection. If you leave this field blank, the links generated will use the respective quicklinks.
Description	Detailed description about the collection.
Include Sub-folders	Place a check in the box to allow content from sub-folders to be included in the collection.

4. Click on the **Update** button(🔲) from the toolbar to save the changes.

   The page is refreshed, and the updated collection information is displayed.

Deleting a Collection

When you no longer wish to keep a specific collection, you can delete if from your Web site.

To delete a collection, perform the following steps:

1. Begin by navigating to the collection you wish to delete as described in "Viewing a Collection" on page 282.

2. Click on the **Delete** button(🗑) from the toolbar to delete the collection.

   A confirmation message is displayed.

3. Click **OK**.

   The page is displayed and the collection is deleted from the Web site.

Menu and Menu

Menu is a way of displaying a list of information related to the navigation systems for your Web site which can be maintained by any Ektron CMS200/300 user.

Similar to how the Collections feature works in CMS, using menus gives you the flexibility to display information to display content blocks, library assets, external hyperlink and sub-menus.

This chapter describes Menus: What they are, how they can be used, how to the add, edit, view and delete a menu.

Accessing the Menu Page

There are three ways of accessing a menu:

- Via its respective **content folder**.
- Via **Modules > Menu** folder in the Administrator workarea.
- Via **Navigation links** on the Web page.

We will talk about how to access the menu via the above mentioned options in the following sections.

View Menus via Content Folder

To access the menu via its respective content folder, perform the following steps:

1. Access the workarea and navigate to the content folder for which you want to view the menu.
2. The contents of the folder are displayed.

3. Click on the **View Menu** button(🖿) from the toolbar.

4. The "View All Menus" page is opened, displaying a list of menus under that Content folder.
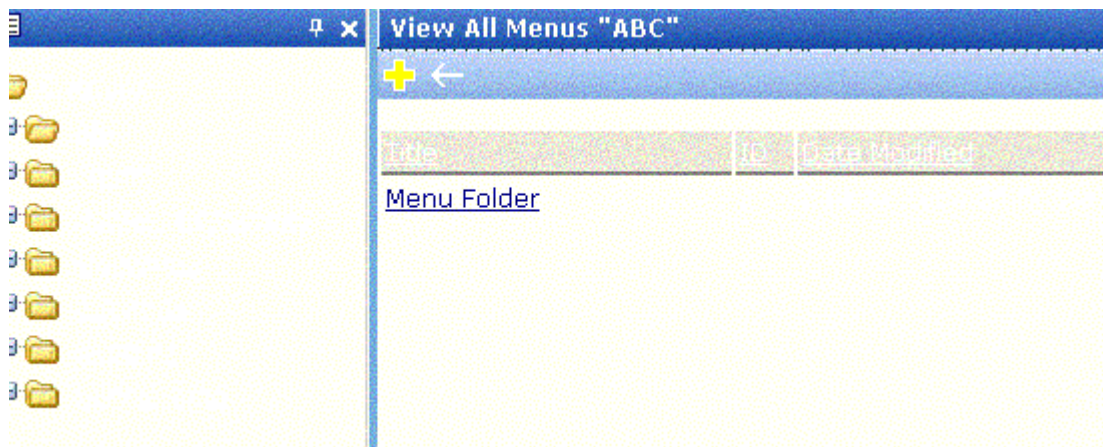
View Menus via Modules Folder in Workarea

To access the menu via the Modules folder, perform the following steps:

1. Access the workarea.

2. Click on the **Modules** folder button from the left frame of the workarea window.

3. Click on the Modules folder to expand its folder hierarchy.

4. Click on the **Menus** folder from the folder hierarchy to view its content.

5. The "Menus Report" page opens, displaying a list of all available menus.
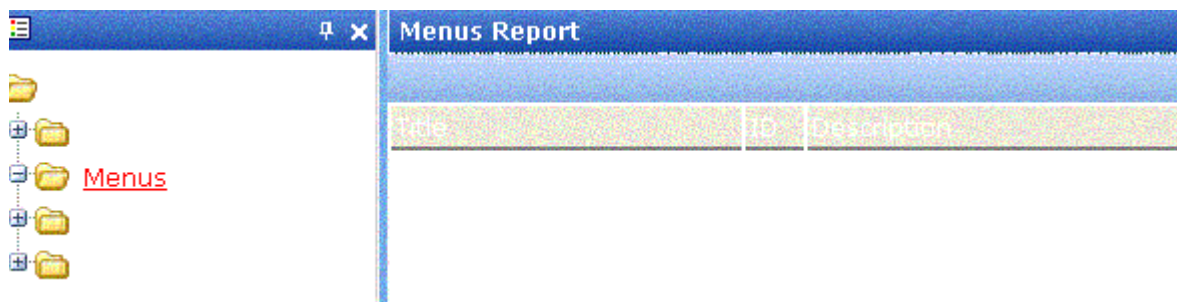
View Menus via Navigation link on a Web Page

To access the menu via navigation link on a web page, perform the following steps:

1. Access the template where you inserted the link to display the menu.

2. Click on the **Menu Navigation link** title on the web page.

3. A DHTML menu is displayed along with all the menu items under that menu.
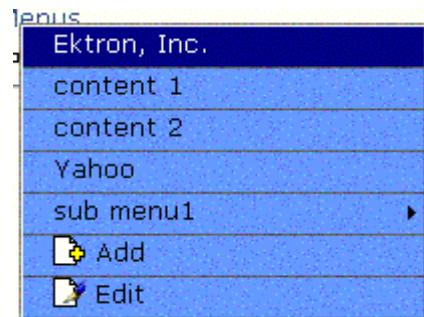
For information on how to insert a link to display the Menu on a Web Page, refer to the section on "Multi-Level Collection" of the Developers Manual.

What's In This Chapter

The following information is included in this chapter:

- "Editing a Content Block Menu Item" on page 312
- "Editing a Library Asset Menu Item" on page 314
- "Editing an External Hyperlink Menu Item" on page 316
- "Editing a Sub- Menu Menu Item" on page 317
- "Viewing a Menu Item" on page 319
- "Removing a Menu Item" on page 322

Main Menu

Ektron CMS200/300 gives you the flexibility to add, edit, view and delete a menu. The following section will walk you through the steps on how to do just that.

Adding a New Menu

Though there are different ways of viewing a menu, there is only one way of adding a main menu. That is, via a content folder.

To create a new menu, perform the following steps:
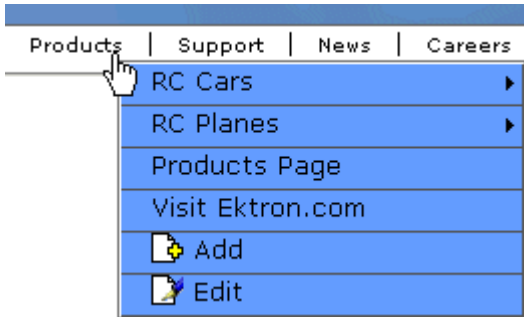
1. Go to the content folder where you want to create the menu by referring to "Accessing the Content Folder" on page 43.

2. Click on the **View Available Menus** button(⬚)from the workarea toolbar to view all menus available for that folder.

3. The "View All Menus" page is displayed.

4. Click the **Add** button(➕) from the toolbar.

5. The "Add Menu" page is displayed.
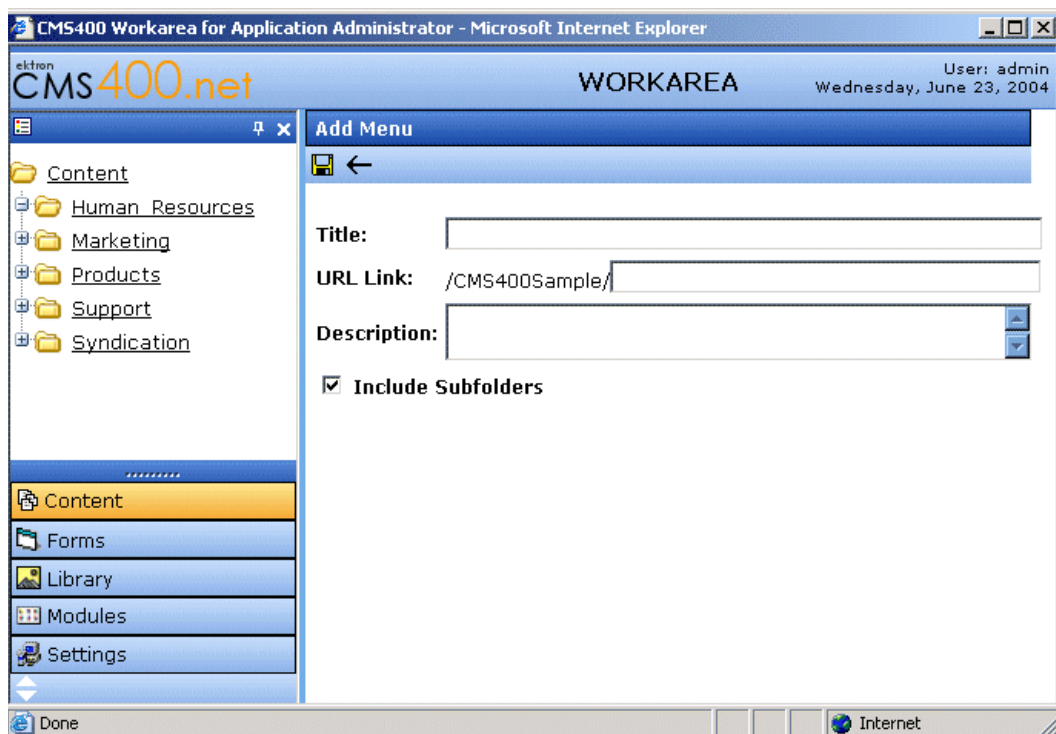
6. Using the following table as a reference, fill out the fields in the Add Menu window.

Field	Description
Title	The name given to the menu by the creator.

Field	Description
URL Link	After you create a menu, your developer links it to text or an image on a Web page by modifying a page template. As a result, when a user reading that Web page moves the cursor over the text or image, the menu appears. In the illustration below, the menu appears when the user moves the cursor over **Products**. You can also assign a URL link to a menu, using this field. If you do, and the user *clicks* the link text or image, he jumps to the specified page. For example, in this field you assign the product landing page, CMS400Sample/products.aspx. In the illustration above, if the user *moves the cursor* over **Products**, the assigned menu appears. However, if the user *clicks* **Products** (as indicated by the hand), he jumps to CMS400Sample/products.aspx. **Entering the Path to the Landing Page** This path has to be a relative path. For example: /CMS200/300Sample/index.aspx This URL path can be a static template path (like the one mentioned above) or a dynamic path, such as /CMS200/300Sample/index.aspx?id=25
Description	Add a more detailed description for the menu that will be added.
Include Subfolder	Check off if you would like to add content blocks that belong to sub folders of the content folder you are adding the menu to.

7. Click on the **Save** button(⊟) from the toolbar to save the changes.

With the menu added, you may now assign menu items to it. See "Adding a Menu Item" on page 303.

Additionally, for each menu folder, you have the following options

Button	Name	Description	More Information
✚	Add Menu	Allows you to create a new menu for a current folder or add menu items to the menu.	"Adding a New Menu" on page 291
📝	Edit Menu	Click to edit an existing menu.	"Editing a Menu" on page 294
🗑	Delete Menu	Allows you to delete the menu and all the menu items under it.	"Deleting a Menu" on page 301
🗐	View Menu	Allows you to view all available menus for that content folder	"Viewing a Menu" on page 297
←	Back	Click on this button to go to the previous page.	

Editing a Menu

Unlike adding a menu, editing an existing menu can be done via:

- Its Content Folder
- Menus Folder
- Navigation Link on a Web Page

We will talk about all of these scenarios:

Editing a Menu via its Content Folder

To edit an existing menu from a content folder, perform the following steps:

1. Access the content folder where you had created the menu by referencing to "Viewing a Menu" on page 297.

2. Click on the **View Available Menus** button(🗐)from the workarea toolbar.

3. The "View All Menus" page is displayed that lists all the menus that are available for that content folder.

4. Click on the title of the Menu you would like to edit.

5. The "View Menu" page for that menu is displayed.

6. Click on the **Edit** button(🗒) from the toolbar.

7. The "Edit Menu" page is displayed.

8. Make all the necessary changes to the fields in Edit Menu window by referencing the table below..

Field	Description
Title	The name that was given to the menu by the creator.
URL Link	Landing link for the menu. This path has to be a relative path. For Example: /CMS200/300Sample/index.aspx This URL path can be a static template path like the one mentioned above or a dynamic path such as /CMS200/300Sample/index.aspx?id=25
Description	Add a more detailed description for the menu that is being edited.
Include Subfolder	Check off if you would like to add content blocks that belong to sub folders of the content folder you are editing the menu for.

9. Click on the **Save** button(💾) from the toolbar to save the changes.

   The page is refreshed, and the updated menus table is displayed.

Editing a Menu via Menus Folder

To edit an existing menu via Menus folder, perform the following steps:

---

1. Access the workarea.

2. Click on the **Modules** folder button from the left frame of the workarea window.

3. Click on the Modules folder to expand its folder hierarchy.

4. Click on the **Menus** folder from the folder hierarchy to view its content.

5. The "Menus Report" page opens, displaying a list of all available menus.

6. Click on the title of the Menu you would like to edit.

7. The "View Menu" page for that menu is displayed.

8. Click on the **Edit** button( ) from the toolbar.

9. The "Edit Menu" page is displayed.

10. Make all the necessary changes to the fields in Edit Menu window by referencing the table under "Editing a Menu via Content Folder".

11. Click on the **Save** button( ) from the toolbar to save the changes.

    The page is refreshed, and the updated menus table is displayed

Editing a Menu via Navigation Link on a Web Page

To edit a menu via navigation link on a Web Page, perform the following steps:

1. Access the template where you inserted the link to display the menu.

2. Click on the **Menu Navigation link** title on the web page.

3. A DHTML menu is displayed along with all the menu items under that menu.

4. Click on the **Edit** button( ) from the drop down list.

5. The "CMS200/300 workarea" window will open that will display the View Menu page for the menu

6. Click on the **Edit** button( ) from the toolbar.

7. The "Edit Menu" window is displayed.

8. Make all the necessary changes to the fields in Edit Menu window by referencing the table under "Editing a Menu via Content Folder".

9. Click on the **Save** button( ) from the toolbar to save the changes.

    The page is refreshed, and the updated menus table is displayed

Viewing a Menu

Just like editing an existing menu, one can view a menu via:

- Its Content Folder

- Menus Folder

- Navigation link on a Web Page

Viewing a Menu via its Content Folder

To access the Menu via its content folder, perform the following steps:

1. Access the content folder where you created the menu.

2. Click on the **View Menu** button(⬚) from the toolbar.

3. The "View All Menus" page is opened which will displays a list of menus under that content folder.

4. Click on the title of the Menu you would like to view.

5. The "View Menu" page for that menu is displayed that lists all the menu items under that menu.

6. Click on the **More Info** link to view the details about the menu

7. Refer to the following table to view the properties of the menu in more details:

Name	Description
Title	Title assigned to the menu folder.
ID	Content ID # that is assigned to the menu by Ektron CMS200/300. Note: The ID for the Menu is automatically generated by the CMS200/300 application when you create a menu.
Path	Path for the content folder where the menu resides in.
Last User to Edit	Last user to edit this menu.
Last Edit Date	Date and time when this menu was last edited.
Date Created	Date and time when this menu was created.
Description	Description given to the menu folder.
Include Subfolders	Check off if you would like to add content blocks that belong to sub folders of the content folder you are adding the menu to.
Title	Title assigned to the menu item.
ID	Content ID # that is assigned to the menu item by Ektron CMS200/300. Note: The ID for the Menu item is automatically generated by the CMS200/300 application when you create a menu item.
URL Link	Displays the path for the landing page for the menu item. This can a quicklink path for the menu item within Ektron CMS200/300, or an external link to a web page.

Additionally, for each menu folder, you will have the following options in the View Menu toolbar:

Button	Name	Description	More Information
➕	Add Menu Item	Allows you to add menu items to the menu.	"Adding a Menu Item" on page 303
➖	Remove Menu Item	Allows you to remove the menu item from the menu.	"Removing a Menu Item" on page 322
A↓	Reorder Menu Item	Allows you to set the order in which the menu item(s) will appear • Ascending: Example: A-Z • Descending: Example: Z-A	
📝	Edit Menu	Click to edit an existing menu.	"Editing a Menu" on page 294
🗑	Delete Menu	Allows you to delete the menu and all the menu items associated with it.	"Deleting a Menu" on page 301
←	Back	Clicking on this button takes you to the previous page.	

Viewing a Menu via Menus Folder

To view an existing menu via Menus folder, perform the following steps:

1. Access the workarea.

2. Click on the **Modules** folder button from the left frame of the workarea window.

3. Click on the Modules folder to expand its folder hierarchy.

4. Click on the **Menus** folder from the folder hierarchy to view its content.

5. The "Menus Report" page opens, displaying a list of all available menus.

6. Click on the title of the Menu you would like to edit.

7. The "View Menu" page for that menu is displayed.

8. Click on the **More Info** link to view the details about the menu.

Viewing a Menu via Navigation Link on a Web Page

To view a menu via navigation link on a Web Page, perform the following steps:

1. Access the template where you inserted the link to display the menu.

2. Click on the **Menu Navigation link** title on the web page.

3. A DHTML menu is displayed along with all the menu items under that menu.

Deleting a Menu

Similar to Editing and Viewing a menu, one can delete a menu via

- Its Content Folders
- Menus Folder

Deleting a Menu via Content Folder

To delete a menu via its content folder, perform the following steps:

1. Access the content folder where you had created the menu by referencing to "Viewing a Menu" on page 297.

2. Click on the **View Available Menus** button(🗐)from the workarea toolbar to view all the menus that are available for that folder.

3. The "View All Menus" page is displayed.

4. Click on the title of the Menu you would like to delete.

5. The "View Menu" page for that menu is displayed.

6. Click on the **Delete** button(🗑) from the toolbar.

7. A confirmation message is displayed.

8. Click OK to delete the menu

NOTE   Deleting a menu will automatically delete all menu items associated with it.

Deleting a Menu via Menus Folder

To delete a menu via its menus folder, perform the following steps:

1. Access the workarea.

2. Click on the **Modules** folder button from the left frame of the workarea window.

3. Click on the Modules folder to expand its folder hierarchy.

4. Click on the **Menus** folder from the folder hierarchy to view its content.

5. The "Menus Report" page opens, displaying a list of all available menus.

6. Click on the title of the Menu you would like to edit.

7. The "View Menu" page for that menu is displayed.

8. Click on the **Delete** button(🗑) from the toolbar.

9. A confirmation message is displayed.

10. Click OK to delete the menu.

NOTE: Deleting a menu will automatically delete all menu items associated with it.

Menu Items

Similar to being able to add, edit, view or delete a Menu, Ektron CMS200/300, also allows you to add, edit, view and delete a menu item to a menu. The following are the menu items that are supported by CMS200/300:

- Content Block
- Library Asset
- External Hyperlink
- Sub-Menu

The following section will walk you through the steps on how to add, edit, view and delete a menu item to a menu.

Adding a Menu Item

Just like one can edit, view and delete a menu via its content folder and menus folders, one can add a menu item from:

- Content Folder
- Menus Folders
- Navigation Link on a web page

The following section will show you the steps on how to do just that.

Adding a Menu Item via Content Folder

To add a menu item via content folder, perform the following steps:

1. Navigate to the menu that you want to add a menu item to. Refer to "Viewing a Menu" on page 297.

2. Click on the **Add Item** button( ) from the toolbar to add an item to the menu.

3. The Add Menu page opens, displaying a list of items that can be added to the menu.

4. Refer to the table below for selecting the type of menu item and follow the steps to add that menu item.

Name	Assign this type of content to the menu
Content Block	Content blocks
Library Assets	Any library assets: images, files, quicklinks, hyperlinks to the menu
External Hyperlinks	External hyperlinks
Sub Menu	Sub-menus to the main menu

Adding a Menu Item via Menus Folder

To add a menu item via menus folder, perform the following steps:

1. Navigate to the menu that you want to add a menu item to. Refer to **"*Viewing a Menu via Menus folder*"**.

2. Click on the **Add Item** button( ) from the toolbar to add an item to the menu.

3. The Add Menu page opens, displaying a list of items that can be added to the menu.

4. Refer to the table below for selecting the type of menu item and follow the steps to add that menu item

Name	Assign this type of content to the menu
Content Block	Content blocks
Library Assets	Any library assets: images, files, quicklinks, hyperlinks to the menu
External Hyperlinks	External hyperlinks
Sub Menu	Sub-menus to the main menu

Adding a Menu Item via Navigation Link on a Web Page

To add a menu item via navigation link on a Web Page, perform the following steps:

1. Access the template where you inserted the link to display the menu.

2. Click on the **Menu Navigation link** title on the web page.

3. A DHTML menu is displayed along with all the menu items under that menu.
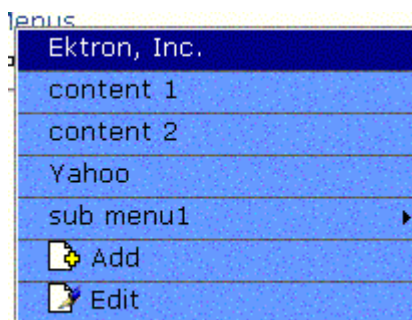
4. Click on the **Add** button( ) from the DHTML drop down menu.

NOTE: The Add button in the DHTML drop down list only allows you to add a content block to a menu. You cannot add any other menu item using this button.

5. The "CMS200/300 Collections" workarea window will open that will display the content folder under which the menu resides in.

6. Select the content folder under which you want to add the content block to, and click the **Next** button to proceed to the next window.

7. The "Add Content" window opens that allows you to enter information in the editor window.

8. Enter all the information in the Add Content window and click on the publish button from the toolbar.

9. The content block gets added to the menu.

Adding a Content Block as a Menu Item

To add a content block as a menu item via content folder or menus folder, perform the following steps:

1. Navigate to the menu that you want to add a content menu item to by referencing to .

2. Click the **Add Item** button( ) to add an item to the menu.

3. The "Add Menu" page opens, displaying a list of items that can be added to the menu.

NOTE You can only add content blocks as menu items if the content folder under which you created the menu folder has content blocks under it.

4. Click the radio button next to **Content Block** option to select it as a menu item.

5. Click the **Next** button to proceed to the next window.

6. The "Add New item" window is displayed, listing all content blocks under the content folder you created the menu folder in.

7. Click the **Select** box next to all content blocks you want to add as menu items.

8. Click the **Add Item** button( ) to add an item to the menu.

9. The "View Menu" page appears, listing lists newly added content blocks in the menu items list.

Adding a Library Asset as a Menu item

To add a library asset as a menu item via content folder or menus folder, perform the following steps:

1. Navigate to the menu that you want to add an item to. Refer to the chapter on .

2. Click on the **Add Item** button( ) from the toolbar to add an item to the menu.

3. The "Add Menu" page opens, which displays a list of items that can be added to the menu.

4. Click on the radio button next to **Library Asset** option to select it as a menu item.

5. Click on the **Next** button to proceed to the next window.

6. The Library for Application Administrator window is opened.

7. Expand the library folder and navigate to the library folder for which you want to add its assets as the menu item.

NOTE   To insert assets, the content folder in which you created the menu must contain library assets. However, you can also insert library assets from other folders for which you have permissions.

8. Select the library asset you want add and click on the **insert** button( ) from the toolbar.

9. The Library for Application Administrator window is closed and you are taken to "Add New Item" window in the Workarea.

10. By default the title field in the Add Menu Item window gets pre-filled with the name of the library asset that you added.

    For Example: If you inserted an image called 'Red Star' as a library asset, the title of the image gets saved as the title of the library asset. That is "Red Star'.

    However, you do have an option to select another title name for the menu item. To do that refer to the table below:

Name	Description
Title	Title of the Library Asset Menu item. When you insert a library asset the title of that asset gets pre-filled as the title of the menu item.
Default Title	By default this box is checked off when you insert a library asset as a menu item. Unchecking this box will allow you to enter a different name for the menu item.
Browse Library	The button to browse through the Library to select the library asset.

11. Click on the **Save** button( ) from the toolbar to save the changes.

    The page is refreshed, and the menu item gets added to the menus folder.

Adding an External Hyperlink as a Menu Item

To add an external hyperlink as a menu item via content folder or menus folder, perform the following steps:

1. Navigate to the menu that you want to add an item to. Refer to the chapter on "Viewing a Menu" on page 297.

2. Click on the **Add Item** button( ) from the toolbar to add an item to the menu.

   The "Add Menu" page opens which displays a list of items that can be added to the menu.

3. Click on the radio button next to **External Hyperlink** option to select it as a menu item.

4. Click on the **Next** button to proceed to the next window.

   The "Add New Item" page is displayed.

5. Enter the title and URL link for the external hyperlink where

Name	Description
Title	Title of the External Hyperlink that is being added as a menu item.
URL Link	The URL link for the external hyperlink.

6. Click on the **Save** button( ) from the toolbar to save the changes.

   The page is refreshed, and the menu item gets added to the menus folder.

NOTE When adding an External Hyperlink as a menu item, the url for the hyperlink does not get added to the library nor does the hyperlink get any ID assigned to it. Hence when you save the menu item, it does not get added to the CMS database nor can it be retrieved for future use.

Adding a Sub Menu as a Menu item

To add a sub-menu as a menu item via content folder or menus folder, perform the following steps:

1. Navigate to the menu that you want to add an item to. Refer to the chapter on "Viewing a Menu" on page 297.

2. Click on the **Add Item** button( ) from the toolbar to add an item to the menu.

   The "Add Menu" page opens which displays a list of items that can be added to the menu.

3. Click on the radio button next to **Sub Menu** option to select it as a menu item.

4. Click on the **Next** button to proceed to the next window.

5. The "Select Folder" page is displayed.

6. Click on the **Next** button to pick a folder for the sub menu.

7. The "Add Menu" is displayed.

8. Using the following table as a reference, fill out the fields in add menu window.

Field	Description
Title	The name given to the sub menu item by the creator.
URL LInk	Landing link for the menu. This can be a relative path or an external path. Note: For external links you need to specify http:// in the path.
Description	Add a more detailed description for the sub menu that will be added.
Include Subfolder	Check off if you would like to add content blocks that belong to sub folders of the content folder to the collection.

9. Click on the **Save** button( ) from the toolbar to save the changes.

   The page is refreshed, and the updated menus table is displayed.

Editing a Menu Item

Just like one is able to edit a menu, one is also able to edit a menu item. However, one is able to edit a menu item via:

- Its content folder
- Menus folder
- Navigation link on a Web Page

The following section will talk about how to edit a menu item in more details.

Editing a Menu Item via its Content Folder

To edit a menu item from its content folder, perform the following steps:

1. Access the content folder where you created the menu.

2. Click on the **View Menu** button(⊡) from the toolbar.

3. The "View All Menus" page is opened which will displays a list of menus under that content folder.

4. Click on the title of the Menu you would like to view.

5. The "View Menu" page for that menu is displayed that lists all the menu items under that menu.

6. Click on the **More Info** link to view the details about the menu item.

7. Click on the title of the Menu item you would like to edit.

8. The "Edit Menu Item" page is displayed.

9. Make all the necessary changes to the fields in Edit Menu window.

10. Click on the **Save** button(⊟) from the toolbar to save the changes.

    The page is refreshed, and the updated menus table is displayed.

Editing a Menu Item via Menus Folder

To edit an existing menu via Menus folder, perform the following steps:

1. Access the workarea.
2. Click on the **Modules** folder button from the left frame of the workarea window.
3. Click on the Modules folder to expand its folder hierarchy.
4. Click on the **Menus** folder from the folder hierarchy to view its content.
5. The "Menus Report" page opens, displaying a list of all available menus.
6. Click on the title of the Menu you would like to edit.
7. The "View Menu" page for that menu is displayed.
8. Click on the **More Info** link to view the details about the menu item.
9. Click on the title of the Menu item you would like to edit.
10. The "Edit Menu Item" page is displayed.
11. Make all the necessary changes to the fields in Edit Menu window.
12. Click on the **Save** button() from the toolbar to save the changes.

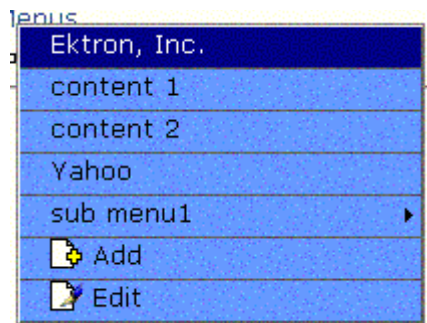   The page is refreshed, and the updated menus table is displayed.

Editing a Menu via Navigation Link on a Web Page

To edit a menu via navigation link on a Web Page, perform the following steps:

1. Access the template where you inserted the link to display the menu.
2. Click on the **Menu Navigation link** title on the web page.

3. A DHTML menu is displayed along with all the menu items under that menu.

4. Click on the **Edit** button( ) from the drop down list.

5. The "CMS200/300 workarea" window will open that will display the View Menu page for the menu

6. The "View Menu" page for that menu is displayed.

7. Click on the **More Info** link to view the details about the menu item.

8. Click on the title of the Menu item you would like to edit.

9. The "Edit Menu Item" page is displayed.

10. Make all the necessary changes to the fields in Edit Menu window.

11. Click on the **Save** button( ) from the toolbar to save the changes.

    The page is refreshed, and the updated menus table is displayed.

Editing a Content Block Menu Item

To edit a content block menu item via its content folder or menus folder, follow the steps mentioned below:

1. Navigate to the Menu for which you want to edit the menu item for by referencing to

2. The "View Menu" window screen will open which will display a list of all the menu items that the main menu consists of.

3. Click on the **More Info** link to view the details about the menu item.

4. Click on the title of the content menu item that you wish to edit.

5. The Edit Menu Item window will open.

Edit Menu Item

Title: Contact Ektron

Default Title: ☑

Description: [   ]

Target:
- ○ Popup
- ● Self
- ○ Parent
- ○ Top

6. Using the table below as a reference, make changes to the content menu item.

Field	Description
Title	The name that was given to the menu item by the creator.
Default Title	Uncheck the Check-box if you want to change the title of the content block to something other than the default. name. Leaving this field as checked will allow you to use the default content title name. Note: By default, the Default Title field is checked.
Description	Add a more detailed description for the content menu item that is being edited.

Field	Description
Target	Select from the given options how you want to view the library menu item. • Popup: Opens in a new browser window • Self: Opens in the same window • Parent: Opens in the parent window • Top: Note: By default the target option is set to self.

7. Click on the **Save** button(🖫) from the toolbar to save the changes.

   The page is refreshed, and the changes made to the menu item get displayed in the menus folder.

Editing a Library Asset Menu Item

To edit a library menu asset via its content folder or menus folder, follow the steps mentioned below:

1. Navigate to the Menu for which you want to edit the menu items for by referencing to "Viewing a Menu" on page 297.

2. The "View Menu" window screen will open which will display a list of all the menu items that the main menu consists of.

3. Click on the **More Info** link to view the details about the menu item.

4. Click on the title of the library menu item that you wish to edit.

5. The Edit Menu Item window will open.

Edit Menu Item

Title:	RedStar Airplane -- smaller version
Default Title:	☑
Description:	

Target:
- ○ Popup
- ◉ Self
- ○ Parent
- ○ Top

6. Using the table below as a reference, make changes to the library asset menu item

Field	Description
Title	The name that was given to the menu item by the creator.
Default Title	Uncheck the Check-box if you want to change the title of the library assets to something other than the default. name. Leaving this field as checked will allow you to use the default title name for the library asset. Note: By default, the Default Title field is checked.
Description	Add a more detailed description for the library menu item that is being edited.
Target	Select from the given options how you want to view the library menu item. • Popup: Opens in a new browser window • Self: Opens in the same window • Parent: Opens in the parent window • Top: Note: By default the target option is set to self.

7. Click on the **Save** button(🖫) from the toolbar to save the changes.

8. The page is refreshed, and the changes made to the menu item get displayed in the menus folder.

Editing an External Hyperlink Menu Item

To edit an external hyperlink menu item via its content folder or menus folder, follow the steps mentioned below:

1. Navigate to the Menu for which you want to edit the menu items for by referencing to "Viewing a Menu" on page 297.

2. The "View Menu" window screen will open which will display a list of all the menu items that the main menu consists of.

3. Click on the **More Info** link to view the details about the menu item.

4. Click on the title of the external hyperlink menu item that you wish to edit.

5. The Edit Menu Item window will open.

6. Using the table below as a reference, make changes to the external hyperlink menu item

Field	Description
Title	The name that was given to the menu item by the creator.
URL Link	URL link for the external hyperlink menu item. This can be a relative path or an external path. Note: For external links you need to specify http:// in the path.
Description	Add a more detailed description for the external hyperlink menu item that is being edited.
Target	Select from the given options how you want to view the library menu item. • Popup: Opens in a new browser window • Self: Opens in the same window • Parent: Opens in the parent window • Top: Note: By default the target option is set to self.

7. Click on the **Save** button(🖫) from the toolbar to save the changes.

8. The page is refreshed, and the changes made to the menu item get displayed in the menus folder.

Editing a Sub- Menu Menu Item

To edit a sub-menu menu item via its content folder or menus folder, follow the steps mentioned below:

1. Navigate to the Menu for which you want to edit the menu items for by referencing to "Viewing a Menu" on page 297.

2. The "View Menu" window screen will open which will display a list of all the menu items that the main menu consists of.

3. Click on the **More Info** link to view the details about the menu item.

4. Click on the title of the sub-menu menu item that you wish to edit.

5. The View Sub-Menu screen is displayed that lists all the menu items under that sub-menu.

6. Click on the **Edit** button( ) from the toolbar to edit the sub menu.

7. The Edit Menu Item window will open.

8. Using the table below as a reference, make changes to the menu item

Field	Description
Title	The name that was given to the sub menu item by the creator.
URL Link	Landing link for the sub-menu. The URL path for the sub-menu needs to be a relative path.
Description	Add a more detailed description for the sub menu that is being edited.

Field	Description
Include Subfolder	Check off if you would like to add content blocks that belong to sub folders of the content folder you are editing the menu for.

9. Click on the **Save** button(🔲) from the toolbar to save the changes.

   The page is refreshed, and the changes made to the menu item get displayed in the menus folder.

Viewing a Menu Item

Just like editing a menu item, one can view a menu item via:

- Its Content Folder
- Menus Folder
- Navigation link on a Web Page

Viewing a Menu Item via its Content Folder

To access the menu item via its content folder, perform the following steps:

1. Access the content folder where you created the menu.

2. Click on the **View Menu** button(🖹) from the toolbar.

3. The "View All Menus" page is opened which will displays a list of menus under that content folder.

4. Click on the title of the Menu item you would like to view.

5. The "View Menu" page for that menu is displayed that lists all the menu items under that menu.

6. Click on the **More Info** link to view the details about the menu item

View Menu "test menu"

✚ ━ ↕ 📝 🗑 ←

Title

🔺 RedStar Airplane -- smaller version
📄 Servo Control Engineer #124
📄 Plastic Molder #123
🌐 yahoo

More Info

Title:	test menu
ID:	6
Path:	\
Last User To Edit:	Application Administrator
Last Edit Date:	25-Jun-2004 07:25:16 AM
Date Created:	25-Jun-2004 07:13:51 AM
Description:	News page

☑ **Include Subfolders**

Title	ID	URL Link
🔺 RedStar Airplane -- smaller version	2	/CMS400Sample/uploadedimages/redstar-index.jpg
📄 Servo Control Engineer #124	14	/CMS400Sample/hr.aspx?id=14
📄 Plastic Molder #123	13	/CMS400Sample/hr.aspx?id=13
🌐 yahoo	0	www.yahoo.com

7. Refer to the following table to view the properties of the menu items in more details:

Name	Description
Title	Title assigned to the menu item.

Name	Description
ID	Content ID # that is assigned to the menu item by Ektron CMS200/300.<hr>Note: The ID for the Menu item is automatically generated by the CMS200/300 application when you create a menu item.
URL Link	Displays the path for the landing page for the menu item. This can a quicklink path for the menu item within Ektron CMS200/300, or an external link to a web page.

Viewing a Menu Item via Menus Folder

To view a menu item via Menus folder, perform the following steps:

1. Access the workarea.

2. Click on the **Modules** folder button from the left frame of the workarea window.

3. Click on the Modules folder to expand its folder hierarchy.

4. Click on the **Menus** folder from the folder hierarchy to view its content.

5. The "Menus Report" page opens, displaying a list of all available menus.

6. Click on the title of the Menu item you would like to edit.

7. The "View Menu" page for that menu is displayed.

8. Click on the **More Info** link to view the details about the menu item.

Viewing a Menu via Navigation Link on a Web Page

To view a menu via navigation link on a Web Page, perform the following steps:

1. Access the template where you inserted the link to display the menu.

2. Click on the **Menu Navigation link** title on the web page.

3. A DHTML menu is displayed along with all the menu items under that menu.
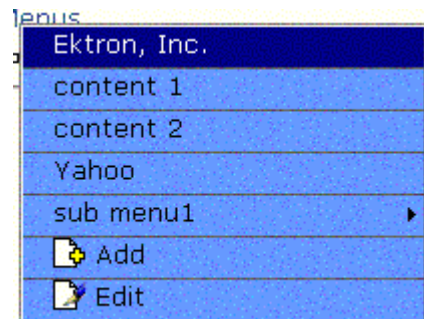
Removing a Menu Item

Similar to Editing and Viewing a menu, one can remove a menu item from a menu via

- Its Content Folders
- Menus Folder

Removing a Menu Item via its Content Folder

To delete a menu item via its content folder, perform the following steps:

1. Access the content folder where you created the menu by referencing to "Viewing a Menu" on page 297.

2. Click on the **View Available Menus** button( )from the workarea toolbar to view all the menus that are available for that folder.

3. The "View All Menus" page is displayed.

4. Click on the title of the Menu you would like to delete.

5. The "View Menu" page for that menu is displayed.

6. Click on the **Remove** button( ) from the toolbar.

7. The "Delete Menu Item" window is opened.

8. Click in the check-box next to the title of the menu item that you wish to delete. Clicking on the Select All link will allow you to select all the menu items that you want to delete. Clicking on the Clear All link will unselect all the menu items you selected to delete.

9. Click on the **Delete** button(▢) from the toolbar.

   The page is refreshed, and the changes made to the menu item get displayed in the menus folder.

Removing a Menu Item via Menus Folder

To delete a menu item via its menus folder, perform the following steps:

1. Access the workarea.

2. Click on the **Modules** folder button from the left frame of the workarea window.

3. Click on the Modules folder to expand its folder hierarchy.

4. Click on the **Menus** folder from the folder hierarchy to view its content.

5. The "Menus Report" page opens, displaying a list of all available menus.

6. Click on the title of the Menu you would like to edit.

7. The "View Menu" page for that menu is displayed.

8. Click on the **Remove** button(▭) from the toolbar.

9. The "Delete Menu Item" window is opened.

10. Click in the check-box next to the title of the menu item that you wish to delete. Clicking on the **Select All** link will allow you to select all the menu items that you want to delete. Clicking on the **Clear All** link will unselect all the menu items you selected to delete.

11. Click on the **Delete** button(▢) from the toolbar.

The page is refreshed, and the changes made to the menu item get displayed in the menus folder.

Forms

The forms module allows you to create a simple mailto form for use within your Web site. By creating a form within Ektron CMS200/300, the E-mail that is generated and set is all done on the server-side of Ektron CMS200/300 as opposed to basic mailto forms which are handled on the client machine.

Each form that is created in Ektron CMS200/300 consists of three key elements, including:

Element	Description
Form	The form that your create in the Forms folder defines the information about the E-mail that will be generated.
Content Block	The content block contains all the form elements that will be used when creating the form fields
Summary	The summary for the content block is displayed when the form is submitted.

The following section explains how to perform all tasks within the forms module folder.

Before You Create a Form

Since the E-mails generated for the forms are created and sent on the server where Ektron CMS200/300 is installed to, it is necessary that your server is capable of sending E-mails properly.

For information about configuring your Web server utilize SMTP for sending E-mails, refer to "Configuring E-mail Notifications" in the Ektron CMS200/300 *Setup Manual, Version 4.5, Revision 4.*

Accessing the Forms Module Folder

To access the forms module folder, perform the following steps:

1. Navigate to the workarea.

2. Click on the **Forms** folder button from the left frame of the workarea window to expand its folder hierarchy.

   The "Forms Module" page is displayed.

Form Module Toolbar

While working within the form module area, there are several buttons that help you perform many tasks.

Displayed here are all the buttons used in the form module folder.

Button	Name	Description	More Information
	Add Content Block	Used to add a new content block when assigning a content block to a form.	
	Add Form	Accesses the add form page.	"Adding a New Form Module" on page 326
	Delete Form	Used to delete a form no longer needed in the Web site	"Deleting a Form" on page 352
	Edit Content	Used to edit the content block that is assigned to the form.	"Editing a Form's Content Block" on page 353
	Edit Form	Accesses the edit form page to make changes to an existing form	"Editing a Form" on page 352

Button	Name	Description	More Information
	Edit Summary	Used to edit the summary that is assigned to the form.	"Editing a Form's Summary" on page 354
	Export Report	Exports the form module reports.	
	Reports	Access the form module reports page.	
	Save	Generic save button.	
	View Content Properties	Accesses the view properties for the content block.	"Viewing a Form's Content Block Properties" on page 354

Adding a New Form Module

Before a form can be added to an Ektron CMS200/300 template, it must first be added.

To add a new form, perform the following steps:

1. Access the form modules page as described in "Accessing the Forms Module Folder" on page 325.

2. Click on the **Add Form** button( ) from the toolbar.

   The "Add Form" page is displayed.

3. Type in all the required information using the following table as a reference.

Field	Description	Required?
Title	Title for the form used to reference the form within the workarea.	Yes
Description	Extended description for the form.	No
Form Data	Specify what you want to do with the form data.	No
To:	Email address where the form will be sent to when the form is submitted.	Yes
From:	Text that will appear in the from field of the email that is generated.	No
CC:	Text that will appear in the CC field of the email that is generated.	No
Subject:	Text that will appear in the subject field of the email that is generated.	No
Preamble:	Beginning text of the email that is generated.	No
Send Data as XML	Check off this box to send the submitted form as XML instead of plain text.	No
Content Title:	Title of the content block that is associated with this form.	Yes

4. Click on the **Save Form** button(💾) from the toolbar.

   The form is saved, and the "Forms Module" page is displayed with the changes reflected.

Associating a Content Block with a Form

When you create a Form module, the application automatically associates a content block with the same name as the Form module to that form. For Example: If you create a form module

called 'New Form', a content block with the same name is created for that form.

Creating a form content block is similar to creating any other kind of content block in Ektron CMS200/300. The editor supplied with Ektron CMS200/300, eWebEditPro+XML, contains a special toolbar to assist you with inserting form elements for the content block.

Creating a Form using Form Elements

To create a content block for a form, perform the following steps:

1. Invoke the editor by clicking on the **Edit** button( ) from the toolbar.
2. The "Edit Content" window opens.
3. Make the necessary changes to the content block using the following table to assist you with each of the fields:

Field	Description
Title	Modify the title assigned to the content block.
Comment	Add a comment to explain the edits that you made to the content block.
Start Date	If desired, specify a date and time the edited content will be visible on the Web site, assuming the content block makes its way through its respective approval chain.
End Date	If desired, specify a date and time the content block will be removed from the Web site.
Body	Make the necessary edits to the content.

4. By default, the form elements toolbar is enabled and displayed in the editor's toolbar.
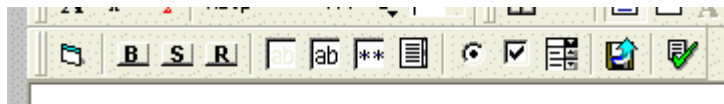
5. Using the following table that explains the functionality of each of the form element toolbar buttons as a reference, we will create a sample form.

Button	Name	Function
	Insert Form	Inserts opening and closing form tags. For example: `<form name="Test" action="http://localhost/ewebeditpro4/formtest.htm" method="post"></form>` When you click this button, a dialog box prompts you to enter the following information for the form: • Name • Action page • Method • Encode Type Note: Inserting a form is not required if the content block is associated with a form defined in the Form modules folder.
	Button	Inserts a button. For example: `<input type="button" value="Test Button" name="Test" />` When you click on this button, a dialog box prompts you to enter the following information for the button: • Name • Value
	Submit Button	Inserts a submit button. For example: `<input type="Submit" value="Submit Button" name="Submit" />` When you click on this button, a dialog box prompts you to enter the following information for the submit button: • Name • Value

Button	Name	Function
R	Reset Button	Inserts a reset button. For example: `<input type="reset" value="Reset Page" name="Reset"/>` When you click on this button, a dialog box prompts you to enter the following information for the reset button: • Name • Value
ab	Hidden Text Field	Inserts a hidden text field. For example: `<input type="hidden" value="This is initial content" name="mycontent" />` When you click on this button, a dialog box prompts you to enter the following information for the hidden text field: • Name • Value
ab	Text Field	Inserts a text field. For example: `<input size="15" value="This is initial content" name="mycontent" />` When you click on this button, a dialog box prompts you to enter the following information for the text field: • Name • Value • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right. Note: See "Overriding Form Module Settings" on page 343 for information about overriding default form module settings.
**	Password	Inserts a password field. For example: `<input type="password" size="5" value="" name="mypassword" />` When you click on this button, a dialog box prompts you to enter the following information for the password field: • Name • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)

Button	Name	Function
	Test Area	Inserts a textarea field. For example: `<textarea name="mycontent" rows="5" cols="4" type="textarea">This is initial content</textarea>` When you click on this button, a dialog box prompts you to enter the following information for the textarea field: • Name • Value • Rows • Columns
	Radio Button	Inserts a radio button. For example: `<input type="radio" checked="checked" value="This is a radio button" name="mybutton" />` When you click on this button, a dialog box prompts you to enter the following information for the textarea field: • Name • Value • Default is Checked
	Check Box	Inserts a check box. For example: `<input type="checkbox" checked="checked" value="This is a check box" name="mycheckbox" />` When you click on this button, a dialog box prompts you to enter the following information for the check box: • Name • Value • Default is Checked

Button	Name	Function

	Select	Inserts a selection box. For example:
		`<select multiple="multiple" size="25" name="myselectbox">`
		`<option value="option1">option1</option>`
		`<option value="option2">option2</option>`
		`</select>`
		
		When you click on this button, a dialog box prompts you to enter the following information for the select box:
		
		• Name
		
		• Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
		
		• Allow multiple
		
		• Option name
		
		• Display value

	File Upload	Inserts a File Upload field and a Browse button. For example: `<input type="file" size="10" name="Save" />` When you click on this button, a dialog box prompts you to enter the following information for the File Upload: • Name • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
	Form Validation	Applies a validation rule to a selected form element field in the editor. See the "Form Validation" on page 345 for more information.

6. To create a form, lets start by adding the fields as shown below in the form content block.

7. To do that you need to click on the form button that you want to use from the editor's toolbar and fill in the information in the fields. For Example: In this case, we used the Text Field and Select box.

8. Once done, you can set the Validation on a field by selecting the field name and then clicking on the **Form Validation** button from the toolbar. For more information on Validation, refer to "Form Validation" on page 345.

   At this point you can either customize the post back message that is displayed when you submit the form or publish the content block.

9. To customize the post back message, click on the **Edit Summary** button( ) from the Edit Content window.

10. The "Edit Summary" window opens.

11. Enter a post back message for the form that you just created.
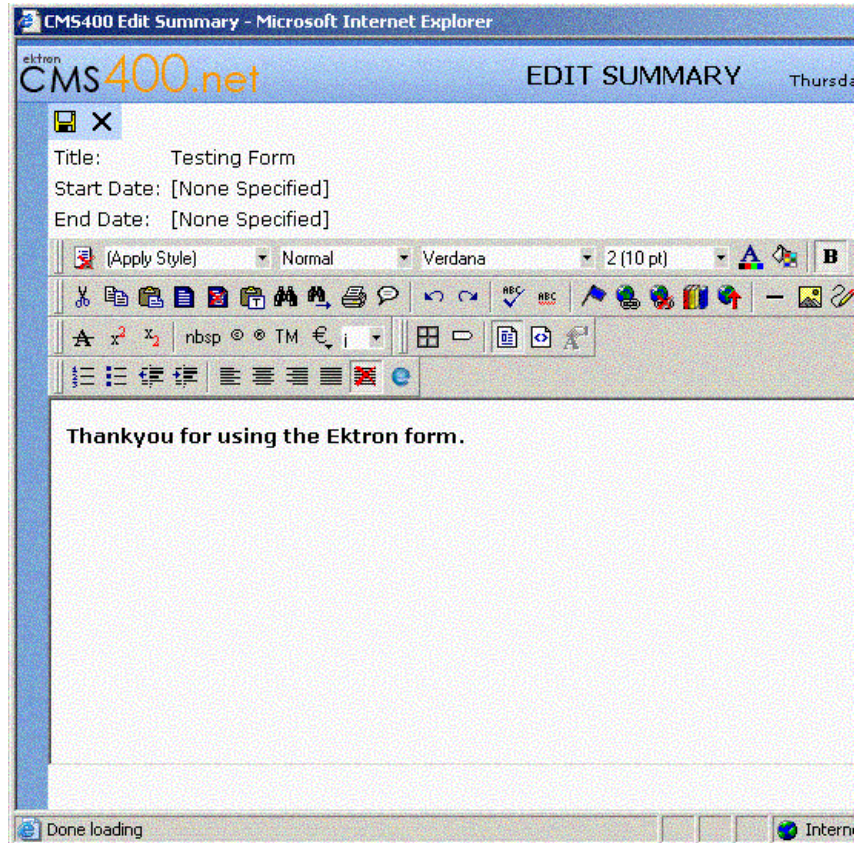
NOTE The summary may be as long as you are allowed, and you can also include your favorite features in it like images, files, and hyperlinks as well.

12. Click on the **Save** button( ).

13. The summary is saved and you are taken back to the "Edit Content" window.

14. Click on the **Publish** button( ) from the Edit Content window toolbar to complete the creation process.

15. The "View Form" window is displayed.

Now that we have created a form, we can now implement it on the site by associating it with a template. The next section will talk about just that.

Implementing a Form on a Web Page

After you have created a form, the next step is to implement it on a Web Page. To do that, follow the steps mentioned below:

1. Navigate to the template where you want to implement the Form content block. For Example: In this case, we will use support.asp.

2. Place the custom function for a Form content block between the body of the template.

```
<%ecmFormBlock(31) %>
```

This custom function will call Form content block that you placed, which in this case is id=31, to display the form.

3. Enter information in all the required fields.

4. Once done, click on the **Submit Form** Button.

The page gets refreshed and displays the post back message that you created.

Form Permissions

Permissions for forms are similar to those of calendars. The form permissions are set when setting permissions for a content folder the form content block belongs to.

The following section explains the different permissions that may be set for a form.

Administrator Permissions

Similar to content blocks, users that belong to the administrator user group have full control over all form features.

You MUST be a member of the administrator group to:

- Add a form
- Edit a form
- Delete a form

On top of these privileges, you may also perform all actions to a form content block.

User Permissions

Users that do not belong to the administrator user group are unable to add, edit, and delete forms.

Non-administrator users, however, may add, edit, delete, and restore form content blocks if they have these permissions on the content folder or content block.

Since only administrators have the option to associate a form content block to a form, users can add a form content block to Ektron CMS200/300, however, only an administrator can associate the form content block with a form.

Storing Form Data in a Database

Form data can be stored in your Ektron CMS200/300 database. This allows you to store information submitted by visitors, and also view reports on the stored information.

When creating or editing a form, you may specify what to do with the form data. The options available are:

- Send form data via email
- Store form data into the database
- Send form data via email and store data to the database

See "Adding a New Form Module" on page 326 and "Editing a Form" on page 352 for information about toggling this option on and off.

Sending Data as XML

During the process of creating a form, you have the option to configure the E-mail that is generated to send structured XML data or a plain text E-mail.

See "Adding a New Form Module" on page 326 and "Editing a Form" on page 352 for information about toggling this option on and off.

XML vs. Plain Text Example

The following section explains the difference between sending the data as XML or plain text using the form displayed below as the example.

Displayed here is an example of the form before being submitted.
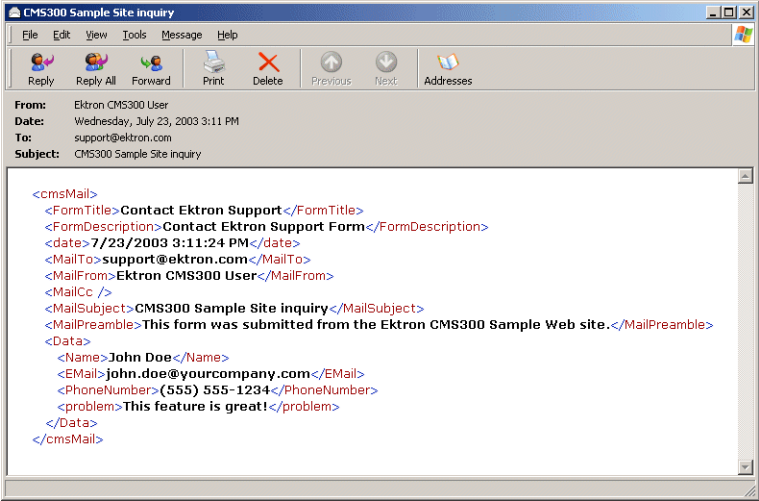
The following table displays the resulting E-mail sent, depending on the method used.

Form Sent As	Generated E-mail
Plain Text	

Form Sent As	Generated E-mail
XML	

As you can see, sending the data as structured E-mail allows you to easily parse through the content to store and retrieve important and relevant information.

XML E-mail Structure

If you have configured your forms to send the data as XML, you will notice that the E-mail is divided into two groups of XML tags:

- Form & Mail Tags
- Data tags

The following image shows the different sections of the XML E-mail structure:
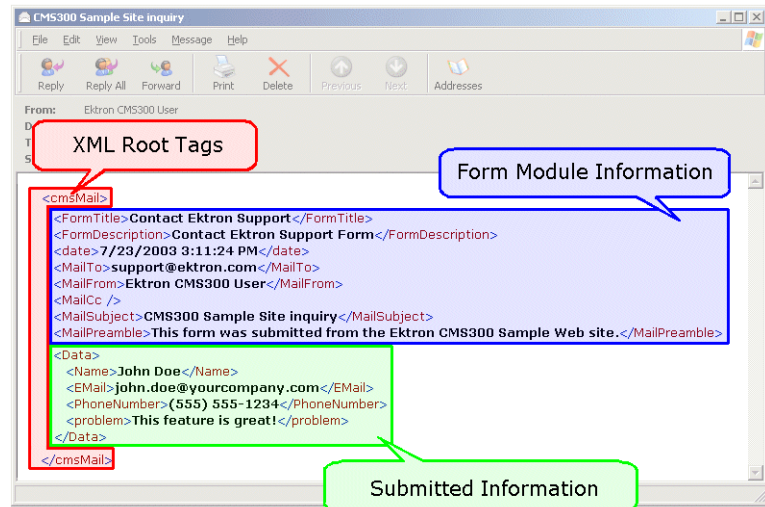
The following sections explain the different sections of the XML E-mails.

Root Tag

The entire XML E-mail is wrapped in <cmsMail> root tags.

Form & Mail Tags

The form and mail tags display the information about the form that was submitted. The data displayed within the XML tags was generated from the form information in the Workarea.

Displayed here is a comparison of the information defined in the workarea for the form and the information defined in the XML email.
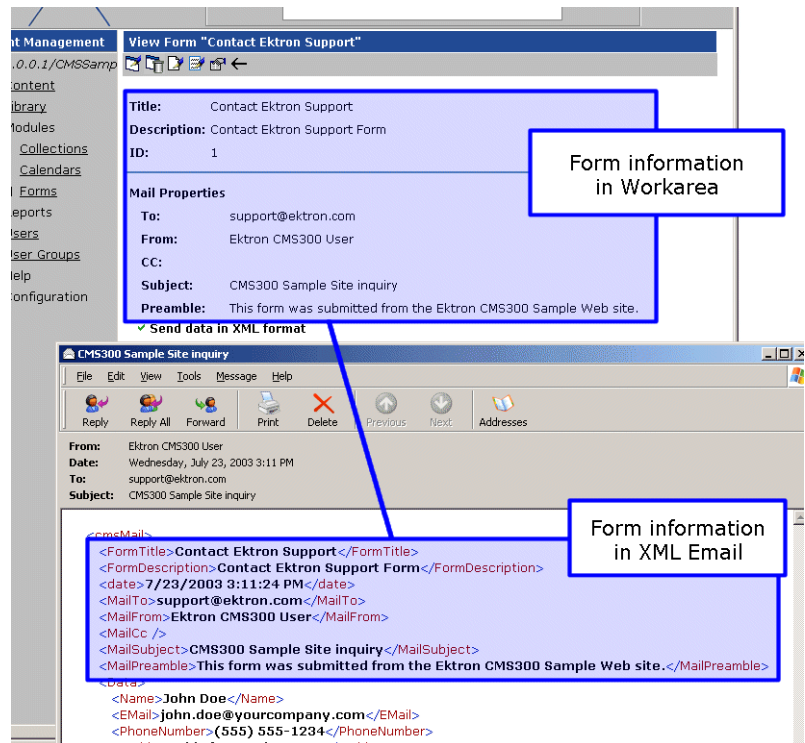
The following table explains each of the XML tags in the form and mail section of the E-mail.

XML Tag	Description
<FormTitle>	Title given to the form that was submitted.
<FormDescription>	Description given to the form that was submitted.
<date>	Date and time the form was submitted.
<MailTo>	To E-mail address(es) defined in the form.
<MailFrom>	From E-mail address(es) defined in the form.
<MailCc>	CC address(es) defined in the form.

XML Tag	Description
<MailSubject>	Subject for the generated E-mail defined in the form.
<MailPreamble>	Preamble for the generated E-mail defined in the form.

Data Tags

The data tags of the XML E-mail wrap the information that was entered by the submitter of the form. Each form element name in the content block becomes an XML tag.

The following image explains how a form is edited in the editor, displayed on a Web page, and then converted into XML for the E-mail.

As you can see, the content block is comprised of four form elements that are converted to XML tags, including:

- Name
- Email
- PhoneNumber
- Problem
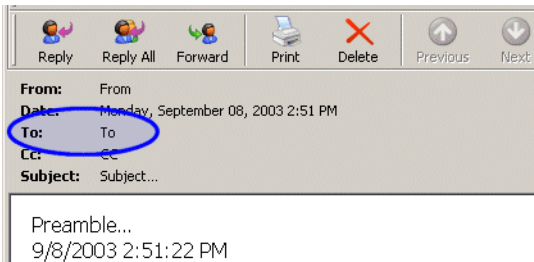
The information that is submitted by the user is wrapped by these XML tags.
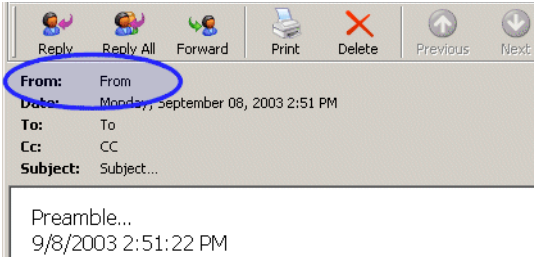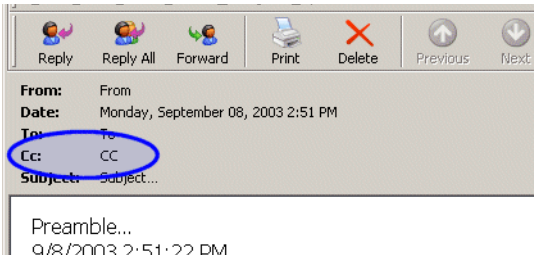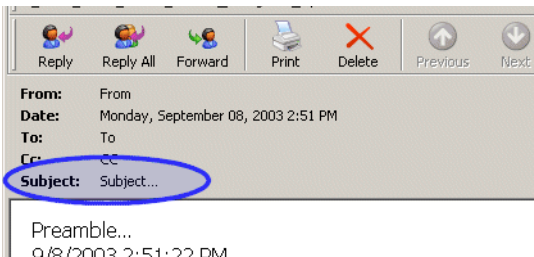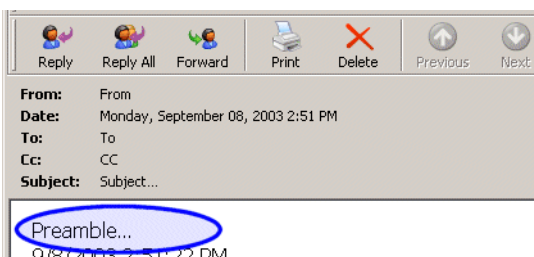
Overriding Form Module Settings

During the insertion of text fields in the form content block, there are five special override options. When these options are used, the default settings for the form module are replaced with the information entered by the form submitter.

Form Module Override Names

The following table explains each of the form module override names.

Name	Overrides...	Email
send_email	"to" address(es) in the generated email.	

Name	Overrides...	Email
send_from	"from" address(es) in the generated email.	
send_cc	"cc" address(es) in the generated email	
send_subject	subject line in the generated email.	
send_preamble	preamble in the generated email.	

Overriding Form Module Settings in the Editor

To override form module settings when inserting form elements, perform the following steps:

1. Begin by performing steps 1-4 in .

2. Click on the **Text Field** icon(ab) from the form element toolbar in the editor.

   The "Insert Text Field" window is displayed.

3. In the "Name" text field, enter one of the special form module override names.

Name	Overrides...
send_email	"to" address(es) in the generated email.
send_from	"from" address(es) in the generated email.
send_cc	"cc" address(es) in the generated email
send_subject	subject line in the generated email.
send_preamble	preamble in the generated email.

4. Type in the remaining information and click **Insert**.

   The text area form element is inserted into the content.

Form Validation

Validation rules can be applied to the form elements inserted into your form content block. The type of validation rules that can be applied depends on the type of field it is being applied to.

To apply a validation rule to a form element, perform the following steps:

1. Begin by performing steps 1-4 in .

2. Insert either a text field, text area field, or selection list.

---

3. When the form element is inserted into the editor, click on it.

4. Click on the **Set Validation** icon (📝) from the form element toolbar in the editor.

   The "Form Validation Rules" window opens.

5. Select the validation rule you want to apply to the form element from the drop-down list.

   The following table explains each of the validation rules, as well as the fields that it can be applied to:

Validation Rule	Can be applied to...	When applied, data in the field must...	Valid Examples...
No Validation	Text field, Text Area Field and Select List field	No validation is done on the field.	
Cannot be blank	Text & text area fields	contain text or numbers. Field cannot be left blank.	"anything"
Numeric Only	Text field only	contain only numbers, no text.	1248361
Text Only	Text field only	contain only text, no numbers.	"yada"
Date Only	Text field only	be in a date format. for example, mm/dd/yy or mm/dd/yyyy	03/02/80 08/29/2002
Email Type Only	Text field only	have a correct email address	ajo@company.com
Credit Card Validation	Text field only	be a valid credit card number.	*VISA*: **4111 1111 1111 1111** (16 digits) *MC*: **5500 0000 0000 0004** (16 digits) *AMEX*: **340000000000009** (15 digits) *DC*: **30000000000004** (14 digits) *DIS*: **6011000000000004** (16 digits)
Social Security Number	Text field only	be a valid social security number.	123-45-6789 123456789
U.S. Postal Codes (2 Letter state)	Text field only	be valid U.S. state postal code.	NH MA
U.S. Zip Codes	Text field only	be a 5 digit U.S. zip code, or zip+4.	12345 12345-6789

Validation Rule	Can be applied to...	When applied, data in the field must...	Valid Examples...
U.S. & Canadian Phone Number	Text field only	match the U.S. or Canadian phone pattern.	(123) 456-7890 (123)456-7890
Canadian Postal Code	Text field only	match the Canadian postal code format.	Z5Z-5Z5 Z5Z5Z5
Time	Text field only	be in a valid time format. HH:MM, HH:MM:SS, HH:MM:SS.mmm	12:45 12:45:05 12:45:05.052
IP Address	Text field only	be in a valid IP address format. for example, 999.999.999.999	192.168.0.1 255.255.255.255
Dollar Amount	Text field only	be in a valid dollar format.	100 100.00 $100 $100.00
Canadian Social Insurance Number	Text field only	be in a valid Canadian social insurance number format.	999999999 123456789
Number of Characters	Text area only	adhere to the max/min settings specified.	
Cannot be first option	Select list only	not be the first option on the selection list	

6. If desired, and able to, specify a max or min value. These values allow you to further validate the data.

7. Type in an error message. This is the message that is displayed if the data in the form element does not match the validation rules.

8. Click on the **Save** button in the Form Validation Rules window to save the changes.

   The "Form Validation Rules" window closes and the validation rule is applied to the selected element.

Viewing Form Reports

If a form module is set to store data into the database, then you can run a report on the forms and view the information that was submitted.

To view the form reports, perform the following steps:

1. Access the forms module page as described in "Accessing the Forms Module Folder" on page 325.

2. Navigate to the Form Folder you want to view the report for.

   You are taken to Form Modules page.

3. Click on the title of the form you want to view.

   The "View Form" page is displayed.

4. Click on the **View Reports** button(📊) from the toolbar.

   The "View Forms Report" page is displayed.

5. Configure your report settings using the following table as a reference.

Field	Description
Start Date	If desired, specify a start date. The report returns only entries that were recorded after the start date.
End Date	If desired, specify an end date. The report returns only entries that were recorded before the end date.
Report Display	Choose whether to display the report horizontally or vertically.
Data Type	Specify the data type to filter the report by.

6. Click on the **Get Result** button.

   The "View Forms Report" page is displayed.

Exporting Form Reports

Once you run a report, you can then export the data for further analysis.

To export the data from a form report, perform the following steps:

1. Access the view form reports page for the report you want to export as described in "Viewing Form Reports" on page 348.

2. Click on the **Export Reports** button( ) from the toolbar.

   An export report dialog box is displayed.

3. Choose the option that best suits your needs.

When exported, you can open the file that contains the data and perform the necessary tasks on it.

Form Module Management

Viewing a Form

Once a form has been created, you can view the form in the forms module folder.

To view an existing form, perform the following steps:

1. Access the form modules folder as described in "Accessing the Forms Module Folder" on page 325.

2. Click on the title of the form you would like to view.

   The "View Form" page is displayed. The following table explains all the information displayed.

Field	Description
Form Title	Title for the form used to reference the form within the workarea.
FormID	ID number automatically assigned to the form by Ektron CMS200/300.
Status	The current state the form is currently in.
Description	Extended description for the form.

Field	Description
Form Data	The type of form data - Mail or Database.
Content Properties	Displays a properties link for the content associated with the form.
Content Title	Title for the content block associated with the form. Note: The content name is the same as the Form name.
Content ID	Content ID # that is assigned to the content block by Ektron CMS200/300.
Status	The current state that the content block is in.
Last Editor	Last user to edit this content block.
Start Date	Date and time when the content block will go live on the Web site.
End Date	Date and time when the content will be removed from the Web site.
Date Created	Date and time when this content block was created.
Mail Properties	Displays the mail properties link for the form.
To	Email address the form will be sent to when the form is submitted.
From	Text that will appear in the from field of the email that is generated.
CC	Text that will appear in the CC field of the email that is generated.
Subject	Text that will appear in the subject field of the email that is generated.
Preamble	Beginning text of the email that is generated.
Send data in XML Format	A green check means the data sent in the email will be a structured XML packet. A red X means the data will be send as a standard mailto form email.
Form Content	Content block associated with the form.
Post Back Content	Summary for the content block associated with the form. This content is displayed when the form is submitted.

The view form page also contains several buttons to perform other tasks.

The following table explains each of the displayed buttons.

Button	Name	Description	More Information
	Edit Content	Used to edit the content block that is assigned to the form.	"Editing a Form's Content Block" on page 353
	Edit Summary	Used to edit the summary that is assigned to the form.	"Editing a Form's Summary" on page 354
	Edit Metadata	Used to edit the metadata that will correspond to this form content block.	
	View History / Audit Trail	Allows you to view all the historical published version of the content block, as well as restore and older version.	
	Edit Form	Accesses the edit form page to make changes to an existing form	"Editing a Form" on page 352
	Delete Form	Used to delete a form no longer needed in the Web site	"Deleting a Form" on page 352
	Link Check	Searches for content blocks that contain a link to the displayed content block.	
	Add Task	Allows you to assign a task to a user in regards to the selected content block.	
	View Reports	Allows you to run a report on the forms and view the information that was submitted.	

Button	Name	Description	More Information
	View Content Properties	Accesses the view properties for the content block.	"Viewing a Form's Content Block Properties" on page 354
	Back	Click on the **Back** button to go to the previous window.	

Editing a Form

Once a form has been added to Ektron CMS200/300, it can easily be edited in the event that information needs to be changed.

To edit an existing form, perform the following steps:

1. Access the view form page, for the form you would like to edit, as described in "Viewing a Form" on page 349.

2. Click on the **Edit Form** button( ) from the toolbar.

   The "Edit Form" page is displayed.

3. Make the necessary changes to the form

4. Click on the **Save** button( ) from the toolbar to save the changes.

   The updated form is saved and the view form page is displayed with the changes reflected.

Deleting a Form

Forms that no longer used or needed can easily be deleted from the workarea.

NOTE   Deleting a form will also delete the content block and summary associated with it.

To delete a form, perform the following steps:

1. Access the view form page, for the form you wish to delete, as described in "Viewing a Form" on page 349.

2. Click on the **Delete Form** button( ) from the toolbar.

   A confirmation message is displayed.

3. Click **OK**

   The page is refreshed and the Form Modules table is displayed with the deleted form removed.

Editing a Form's Content Block

The content block that is associated with the form can be edited by a variety of methods including:

- Accessing the content via its respective content folder.

- Accessing the content via the icon menu on the Web page.

- Editing the content via the view form page

- Accessing the content via the view form content properties page

This section explains how to edit a form's content block via the view form page.

To edit a form's content block, perform the following steps:

1. Access the view form page, for the content block you wish to edit, as described in "Viewing a Form" on page 349.

2. Click on the **Edit** button( ) from the toolbar.

   The "Edit Content" page is displayed.

3. Make the necessary changes to the form's content block.

NOTE   For additional information about creating a form content block, see "Associating a Content Block with a Form" on page 327.

4. If needed, click on the **Edit Summary** ( ) or **Edit Metadata**( ) buttons from the Edit Content toolbar to make changes to the content block's summary or metadata.

5. Click on one of the workflow buttons at the top of the page.

   The content is saved, the edit content window is closed, and the view form page is displayed with the updated content displayed.

Editing a Form's Summary

As stated before, the summary for content block is used as the post back message when a visitor submits a form.

Similar to editing the content block for a form, there are several different ways to access the edit summary page. This section explains how to edit the summary via the view form page.

To edit a form's summary, perform the following steps:

1. Access the view form page, of the form that has the summary you wish to edit, as described in .

2. Click on the **Edit Summary** button(🖼) from the toolbar.

   The "Edit Summary" page is displayed.

3. Make the necessary changes to the form's summary.

4. Click on the **Save** button(💾) from the toolbar to save the changes.

   The summary is saved, the window is closed, and the "View Form" page is displayed.

Viewing a Form's Content Block Properties

Accessible from the view form page is the view form's content block properties page. From this page, you can view additional information about the content block that isn't displayed on the view form page.

To view the properties for a form's content block, perform the following steps.

1. Access the view form page of the form that contains the content you wish to view the properties of, as described in "Viewing a Form" on page 349.

2. Click on the **View Content Properties** button( ) from the toolbar.

    The "View Content" page for the selected content block is displayed.

    The view content page displays extensive information about the content block.

    For more information about the view content page, see "Viewing Content" on page 64.

Calendars

The calendar folder allows you to create event calendars for your Web site. Once created, users may add calendar events that are posted to the calendar for visitors to see.

Accessing the Calendar Modules Page

To access the calendar report page, perform the following steps:

1. Navigate to the Workarea.
2. Click on the **Modules** folder button from the left frame of the Workarea window.

   Modules Folder hierarchy is displayed

3. Click on the **Calendar** folder from the list of folders.

   The "Calendar Modules" page is displayed.

Calendar Toolbar

While working within the calendar modules area, there are several buttons that help you perform many tasks.

Displayed here are all the buttons used in the calendar modules folder.

Button	Name	Description	More Information
	Add Calendar	Accesses the add calendar page.	"Viewing Calendar Modules" on page 371

Button	Name	Description	More Information
	Save	Used to save a calendar or calendar event being added or edited.	
	Show Calendar	Displays the calendar in the workarea.	"View Calendar" on page 372
	Manage Event Types	Allows you to add, edit, and delete Event Types to and from a calendar.	
	Add Calendar Event	Accesses the add calendar event page in the workarea.	
	Edit	Used to edit an existing calendar or calendar event.	
	Delete	Used to delete an existing calendar or calendar event.	"Deleting Calendar Modules" on page 374
	Add Calendar Event	Access the add calendar event page from the calendar on the Web page.	"Adding Calendar Events" on page 375
	View Date	Used to view all calendar events for a selected day.	"Viewing Calendar Events" on page 377

Adding a New Calendar Module

To add a new calendar, perform the following steps:

1. Access the calendar modules page as described in "Accessing the Calendar Modules Page" on page 356.

2. Click on the **Add Calendar** button( ) from the toolbar.

   The "Add or Edit Calendars" page is displayed.

   The add calendar page is divided into four sections that include several fields. The following table explains each of the fields displayed.

Section	Description
Title	Enter a title for the calendar which will be used to reference the table within the workarea.
Description	Enter an extended description for the table.
Location Label	Specify the label for the location of the data which is displayed when a location is specified for a calendar event.
Start Time Label	Specify the label for the start time data which is displayed when the start time is displayed for a calendar event.
End Time Label	Specify the label for the end time data which is displayed when the start time is displayed for a calendar event.
Table Properties	You may configure the calendar size by modifying the table properties. As well as specifying whether to display the weekends or not.
Event Types	Clicking on the checkbox will allow you to select the Event Type for the calendar.
Content Folder	Specify the content folder the calendar will be associated with.

3. Type in all the necessary information for your calendar.

   See "Table Properties" on page 360 and "Calendar Permissions" on page 359 for additional information.

4. Click on the **Save** button(💾) from the toolbar to save your changes.

   The calendar modules page is displayed with the new calendar added to the table.

Calendar Permissions

The calendar permissions are set when setting permissions for a content folder the calendar is associated with. The following section explains the different permissions that may be set for a calendar.

NOTE See "Setting Permissions & Approvals on Content Folders" on page 81 for more information.

Administrator Permissions

Similar to content blocks, users that belong to the administrator user group have full control over all calendar features.

You MUST be a member of the administrator group to:

- Add a calendar
- Edit a calendar
- Delete a calendar

On top of these privileges, you may also add, edit, and delete calendar events.

User Permissions

Users that do not belong to the administrator user group are unable to add, edit, and delete calendars.

In order for a non-administrator user to be able to add, edit, or delete calendar events, they must have add, edit, and delete permissions for the content folder the calendar is associated with.

Table Properties

While adding or editing a calendar, there are several different attributes that you must define to customize the display of the calendar.

The following section explains each of the table properties attributes.

Cell Height

The cell height attribute is used to determine the height, in pixels, of each calendar cell. If there are several calendar events inside one table cell, then the height will expand to accommodate all events.
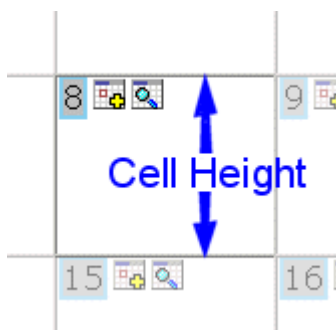
Cell Width
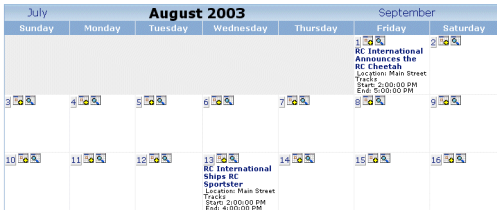
The cell width attribute is used to determine the width, in pixels, of each calendar cell. The width of the cell will never fluctuate if the contents of the cell extend past the cell. Instead, the text will wrap to the next line. You may, however, specify "no-wrap" in the calendar style sheet.
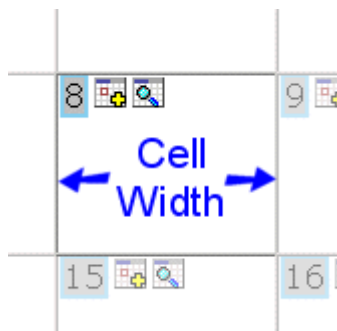
Display Weekends

To only display seven day weeks (Sunday to Saturday), as opposed to five day weeks (Monday to Friday), you may check off this box.

Display Weekends	Do Not Display Weekends

Calendar Style Sheet

The look and feel of the calendar, when displayed on a Web page, is controlled by a style sheet. By default, there are two style sheets that define the styles for the calendars in Ektron CMS200/300.

Style Sheet	Defines the styles for...
\CMS200/300Sample\ekcalendar.css	The calendar in the sample Web site template.
\CMS200/300Sample\CMS200/300Scripts\ekcalendar.css	The calendar in the Workarea.

You may modify either of these style sheets to create a unique look and feel for your calendar both on your Web site, as well as in your Workarea. If desired, you may even create multiple style sheets to apply to multiple calendars.

This section explains how to use a style sheet to control the look and feel of you calendars on your Web pages.

Style Sheet Architecture

There are several classes that are defined in the calendar style sheet.

The following table explains each of the classes and where they are used on the calendar.

Style Class/Element	Defines the style for...
table	Table tags on the Web page.
table.ekcalTableInner	Table inserted within calendar table. TableInner consists of the grid of dates.
table.ekcalTableOuter	The entire calendar table. These styles will be used unless other styles override them.
td, tr	Table rows and cells on the Web page.
td.ekcalcell	Each calendar day cell.
td.ekcalcelltoday	Today's calendar cell.
td.ekcaldayrow	The calendar row that contains the days of the week.
td.ekcalmonthyear	The current month and year at the top of the calendar.
td.ekcalnextmonth	The links to move forward or back a month.
tr.ekcalfirstrow	The calendar's heading table row.
tr.ekcallastrow	The calendar's last row.
a	Anchor tags used throughout the calendar.
a:hover	Anchor tags, when the mouse is hovering over them, throughout the calendar.
a:active	Active anchor tags throughout the calendar.
.ekday	The numerical date displayed.
.ekeventendlabel	The end time label in a calendar event.
.ekeventlocationlabel	The location label in a calendar event.
.ekeventlocaton	The location line of the of the calendar event.

Style Class/Element	Defines the style for...
.ekeventstartlabel	The start time label in a calendar event.
.ekeventtime	The start and end times of the calendar event.
.ekeventtitle	The title of the calendar event

Including Style Sheet on Web Page

You may create as many style sheets as you wish for defining the look and feel of your calendars. You might have one style sheet for a calendar that appears in one section of your Web site, and another style sheet for a calendar that appears in another section.

When inserting a calendar custom function into your Web template, be sure to add a reference to this style sheet, or another custom style sheet, to the template.

NOTE   Refer to the Ektron CMS200/300 *Developer's Reference Manual* for additional information.

Calendar Event Types

Calendar events can also have an Event Type assigned to them. Event types allow you to categorize calendar events. When a user visits a calendar, they can choose an Event Type to filter the calendar by so that they only view events relevant to them.

This section explains how to manage calendar Event Types.

Enabling Event Types

Before Event Types can be managed, you must enable Event Types for the calendar.

To make Event Types available, perform the following steps:

1. Access the "View Calendar [Calendar Name]" page for the calendar you wish to enable Event Types for as described in "Viewing Calendar Modules" on page 371.

2. Click on the **Edit** button(🗗) from the toolbar.

   The "Add or Edit Calendar" page is displayed.

3. Check off the **Event Types Available** box.

4. If desired, check off **Event Types Required**. Which forces users to specify an event type when adding a calendar event.

5. Make any other changes to the calendar if desired.

6. Click on the **Save** button(🖫) from the toolbar to save your changes.

   The settings are saved and the "View Calendar [Calendar Name]" page is displayed with the changes updated.

   In addition, the Manage Event Types button (▤) is displayed in the toolbar.

Once Event Types are available, you can begin managing the Event Types for the calendar.

Managing Event Types

As an administrator, you can manage the Event Types for each calendar created in Ektron CMS200/300. Event types must first be specified, then users can select them when adding calendar events.

This section explains how to manage Event Types.

Viewing Available Event Types

To view available Event Types, perform the following steps:

1. Access the "View Calendar [Calendar Name]" page for the calendar you wish to view the Event Types for as described in "Viewing Calendar Modules" on page 371.

NOTE   If the **Event Types** button is not displayed in the toolbar at the top of the page, you must first make Event Types available. See "Enabling Event Types" on page 363 for more information.

2. Click on **Event Types** button( ) from the toolbar.

    The "View Event Types for [Calendar Name]" page is displayed with a list of currently added Event Types.

    From this page, you can add, edit, and delete Event Types which will be available to the user.

Adding Event Types

To add a new Event Type for a calendar, perform the following steps:

1. Access the "View Event Types for [Calendar Name]" for the calendar you want to add an Event Type to as described in "Viewing Available Event Types" on page 364.

2. Click on the **Event Types** button ( ) from the toolbar.

    It opens "View Event Types for [Calendar Name]" window. This window does not include any Event Types right now.

3. Click on the **Add** button ( ) to add an Event type.

    The "Add or Edit an Event Type" page is displayed.

4. Type an Event Type name in the displayed field.

5. Click on the **Save** button( ) from the toolbar to save the changes.

    The Event Type is saved and the "View Event Types" page is displayed with the new Event Type displayed.

Once an Event Type has been added for a calendar, it can then be assigned to a calendar event by Ektron CMS200/300 users. See "Assigning Event Types To Calendar Events" on page 367 for more information.

Editing Event Types

To edit an existing event type, perform the following steps:

1. Access the "View Event Types for [Calendar Name]" for the calendar that contains the Event Type you wish to edit as described in "Viewing Available Event Types" on page 364.

2. Click on the **Event Types** button ( ) from the toolbar.

   It opens "View Event Types for [Calendar Name]" window which displays a list of all available Event Types

3. Click on the **Edit** button( ) from the toolbar.

   The "Edit an Event Type" page is displayed with a list of all available Event Types displayed.

4. Choose the Event Type you want to edit by clicking on the radio button next to the displayed Event Type.

5. Click on the **Edit** button( ) to edit the Event Type.

   The "Add or Edit an Event Type" page is displayed.

6. Make the necessary changes to the Event Type name.

7. Click on the **Save** button( ) from the toolbar to save the changes.

   The Event Type name is updated and the "View Event Types" page is displayed with the new Event Type displayed.

Deleting Event Types

To delete an available event type from a calendar, perform the following steps:

1. Access the "View Event Types for [Calendar Name]" for the calendar that contains the Event Type you wish to delete as described in "Viewing Available Event Types" on page 364.

2. Click on the **Event Types** button ( ) from the toolbar.

   It opens "View Event Types for [Calendar Name]" window which displays a list of all available Event Types.

3. Click on the **Remove** button(▭) from the toolbar to delete the event type.

   The "Delete Event Types" page is displayed with a list of all available Event Types displayed.

4. Check off the box(es) next to the Event Types you wish to delete.

5. Click on the **Delete** button(🗑) to permanently delete the Event Type.

   A confirmation message is displayed.

6. Click **OK.**

   The "View Event Types" page is displayed with an updated list of the available Event Types.

Assigning Event Types To Calendar Events

As stated earlier, once Event Types are made available and have been created, users can assign Event Types to their calendar events.

To assign an Event Type to a calendar event, perform the following steps:

1. Begin by either adding or editing a calendar event for a calendar as described in "Adding Calendar Events" on page 375 or "Editing Calendar Events" on page 378.

2. Make the necessary additions/edits to the calendar event page.

3. In the Event Types section, click on an available Event Type in the box on the right side.

4. Click on the **Right Arrow**(>) to move the event type.

   The selected event type is moved to the "Selected" box.

5. Repeat steps 3-4 for each event type you want to assign to the calendar event.

6. Finish making the rest of your additions/edits.

7. Click on the **Save** button(💾) from the toolbar to save the changes.

   The calendar event is saved and the previous page is displayed with the changes displayed.

Now that you have assigned an Event Type to a calendar event, visitors can filter the calendar by any Event Type.

Assigning Calendar Event for a Single Day

When assigning an event type to a calendar event, you can now assign the event for a single day or for multiple days.

To assign an event type to a calendar event for a single day, perform the following steps:

1. Begin by either adding or editing a calendar event for a calendar as described in "Adding Calendar Events" on page 375 or "Editing Calendar Events" on page 378.

2. In the Event Types section, click on an available Event Type in the box on the right side.

3. Click on the **Right Arrow**(⟩) to move the event type.

   The selected event type is moved to the "Selected" box.

4. Repeat steps 3-4 for each event type you want to assign to the calendar event.

5. Click on the tab **One Time** to assign the event for a single day.

6. Refer to the table below to fill the information in the One Time fields:.

Field	Description
Date	Date on which the calendar event will be displayed.
Start Time Label	Label for the start time data which is displayed when the start time is displayed for a calendar event.

Field	Description
End Time Label	Label for the end time data which is displayed when the start time is displayed for a calendar event.
Display the times for the event	A check means the calendar will display the time for the event. An empty check box means the calendar will not display the time for the event.

7. Finish making the rest of your additions/edits.

8. Click on the **Save** button(💾) from the toolbar to save the changes.

   The calendar event is saved and the previous page is displayed with the changes displayed.

Assigning Calendar Event for Multiple Days

When assigning an event type to a calendar event, you can now assign the event for multiple days.

To assign an event type to a calendar event for multiple days, perform the following steps:

1. Begin by either adding or editing a calendar event for a calendar as described in "Adding Calendar Events" on page 375 or "Editing Calendar Events" on page 378.

2. In the Event Types section, click on an available Event Type in the box on the right side.

3. Click on the **Right Arrow**(>) to move the event type.

   The selected event type is moved to the "Selected" box.

4. Repeat steps 3-4 for each event type you want to assign to the calendar event.

5. Click on the tab **Recurring** to assign the event for a single day.

6. Refer to the table below to fill the information in the Recurring fields:.

Field	Description
Start Date	Start Date on which the calendar event will be displayed.

Field	Description
End Date	Date on which the calendar event will stop displaying
Number of Events to be created	Number of times the Event will be displayed. This is dependent on the times the event will occur.
Event will occur	Radio button to select from the list of options when the event will occur. These options are pre-defined and cannot be changed.
Event Times	Label for the event time which displays the start and end time for a calendar event.
Display the times for the event	A check means the calendar will display the time for the event. An empty check box means the calendar will not display the time for the event.

7. Finish making the rest of your additions/edits.

8. Click on the **Save** button(💾) from the toolbar to save the changes.

The calendar event is saved and the previous page is displayed with the changes displayed.

Filtering By Event Type

When viewing a calendar, either in the workarea or on a Web page, you can set it to filter the calendar events by Event Type.

To filter a calendar by an Event Type, perform the following steps:

1. Begin by viewing a calendar either in the Workarea or on a Web page.

   At the bottom of the calendar, there is a drop-down list of event types.

2. Click on the "Filter by Event Type" drop-down list and select the Event Type you want to filter the events by.

   The page and calendar is refreshed and the calendar now displays only calendar events that have an Event Type assigned to them that match the selected filtered by type.

Managing Calendar Modules

The calendar modules folder is the centralized location of all calendars that have been created for your Web site.

Viewing Calendar Modules

Once a calendar has been created, you can view its properties at any time.

To view a calendar module, perform the following steps:

1. Access the calendar modules page as described in "Accessing the Calendar Modules Page" on page 356.

2. Click on the title of the calendar you would like to view.

   The "View Calendar" page is displayed.

   The view calendar page contains information about the selected calendar. The following table explains the information displayed.

Field	Description
Title	Title given to the calendar.
ID	ID assigned to the calendar automatically by Ektron CMS200/300. This ID is used to call the calendar to a Web page.
Description	Descriptions given to the calendar.
Location Label	Label for the location data which is displayed when a location is specified for a calendar event.
Start Time Label	Label for the start time data which is displayed when the start time is displayed for a calendar event.
End Time Label	Label for the end time data which is displayed when the start time is displayed for a calendar event.
Cell Height	Height of all cells in the calendar.
Cell Width	Width of all cells in the calendar.
Display Weekends	A green check means the calendar displays the weekends. A red X means the calendar does not.

Field	Description
Event Types Available	A green check means the Event Type is available for the calendar type. A red X means the Event Type is not available for the calendar type.
Event Types Required	A green check means the user is required to select the Event Type when adding/editing a calendar event. A red X means the user is not required to select Event Type when adding/editing a calendar event.
Folder Name	Name of the content folder the calendar is associated with for permissions.
Folder Path	Complete folder path of the content folder the calendar is associated with.

The view calendar page also contains several buttons to perform other tasks.

The following table explains each of the displayed buttons.

Button	Name	Description	More Information
31	View Calendar	Shows the calendar in the workarea.	"View Calendar" on page 372
	Edit	Opens the edit calendar page allowing you to make changes to the calendar.	"Editing Calendar Modules" on page 373
	Delete	Allows you to delete the current calendar.	"Deleting Calendar Modules" on page 374
←	Back	Return to the previous page.	

View Calendar

Once a calendar has been added to Ektron CMS200/300, you may view it at any time via Workarea using the view calendar button.

To view a calendar, perform the following steps:

1. Access the view calendar page, for the calendar you want to see, as described in "Viewing Calendar Modules" on page 371.

2. Click on the **View Calender** button(31) from the toolbar.

   The "Show Calendar" page is displayed in the main area of the Workarea.

From here, you can perform the following tasks:

Button	Name	More Information
	Add Calendar Event	"Adding Calendar Events" on page 375
	View Calendar Events	"Viewing Calendar Events" on page 377
←	Return to Previous Page	Return to previous page

Editing Calendar Modules

All properties of a calendar, with the exception of the ID, can be edited at any time.

To edit a calendar module, perform the following steps:

1. Access the view calendar page, for the calendar you would like to edit, as described in "Viewing Calendar Modules" on page 371.

2. Click on the **Edit** button( ) from the toolbar to edit the calendar module.

   The "Add or Edit Calendar" page is displayed.

3. Make the necessary changes to the calendar using the following table as a reference.

---

4. Click on the **Save** button(🖫) to save your changes.

   The "View Calendar" page for the selected calendar is displayed with the updated changes.

Deleting Calendar Modules

Calendars that are no longer needed on the Web site can easily be deleted.

NOTE Deleting a calendar will delete all calendar events associated with it.

To delete a calendar module, perform the following steps:

1. Access the view calendar page, for the calendar you want to delete, as described in "Viewing Calendar Modules" on page 371.

2. Click on the **Delete** button(🗑) to delete the calendar.

   A confirmation message is displayed.

3. Click **OK**.

   The page is refreshed, and the "View All Calendars" page is displayed with the deleted calendar removed from the list.

Managing Calendar Events

Once a calendar has been created, users may now add calendar events to it.

There are several uses of calendar events. The following list gives some examples of different uses of calendar events.

- Show when and where a company meeting is.

- Reserve a conference room for an interview.

- Post company holidays.

- Post deadlines

These are only a few uses of calendar events, however, the calendar is very versatile and can easily meet all your calendar needs.

The following sections explain how to perform different tasks to the calendar.

Adding Calendar Events

To add a calendar event, perform the following steps:

1. Access the calendar you would like to add a calendar event to as described in "View Calendar" on page 372.

2. Navigate to the month and day you would like to add the calendar event to.

3. Click on the **Add Event** button( ) on the day you would like to add an event to.

   The "Add Calendar Event" page is displayed.

4. Enter all necessary information into the displayed fields using the following table as a reference:

Field	Description
Event Title	Enter a title for the calendar event. When added, this is displayed as the event title in the calendar.
Event Location	If needed, you can specify a location for the event (for example, Conference Room 1 or Cafeteria)
Date	Specify the date to display the calendar event. Click on the calendar button to open the calendar to select a new date.
Start Time	Specify a start time for the event. You need to manually enter the start time of the event. Click on the dropdown list to select AM/PM for the start time.
End Time	Specify a end time for the event. You need to manually enter the end time of the event. Click on the dropdown list to select AM/PM for the end time.
Start Date	Specify a start date for the event. Click on the calendar button to open a calendar to select a new start date.

Field	Description
End Date	Specify a end date for the event. Click on the calendar button to open a calendar to select a new end date.
No. of Events to be created	
Event will occur	Select from the various options to specify when the event will occur. Click on the radio button to select the type of event option.
Start	Specify a start time for the event. You need to manually enter the start time of the event. Click on the dropdown list to select AM/PM for the start time.
End	Specify a end time for the event. You need to manually enter the end time of the event. Click on the dropdown list to select AM/PM for the end time.
Display times for the event	Check this box off to display the start time and end time in the calendar.
Hyperlink	Specify a link that will be applied to the title of the event in the calendar. If you select to add a content block as the calendar event, this field will be populated with the Ektron CMS200/300 quicklink for the content block.
Make Hyperlink Active	Check off this box to apply the link in the hyperlink field to the event title.
Launch Link in New Browser	Enabled when hyperlink title is enabled. Checking off this box will launch the link in a new browser window.
Event Types	If available, select the event types to apply to the calendar event and move them into the selected box.
Root Folder	Displays the current content folder you are in.
Folder Path	Displays the complete content folder path of the content folder you are in.

Field	Description
Folder Tree	Allows you to navigate through the content folders to locate a content block to add as a calendar event.
	Click on the **Add Content** button( ) to create a new content block that can be assigned to the calendar event.

5. Click on the **Save** button( ) to save your changes.

   The page is refreshed and you are taken back to "Show Calendar" page that displays the new calendar event added.

Viewing Calendar Events

Once calendar events have been added to a calendar, you can easily view them.

To view a calendar event, perform the following steps:

1. Access the show calendar page, for the calender that contains the event you would like to view, as described in "View Calendar" on page 372.

2. Navigate through the calendar until you find the event you would like to view.

3. Click on the **View Date** button( ) on the date the calender event occurs on.

   The "View Events" page is displayed listing all calender events for that date.

Adding a Calendar Event from the View Events Page

To add a calendar event from the view events page, perform the following steps.

1. Access the view calendar events page as described in "Viewing Calendar Events" on page 377.

2. Click on the **Add Calendar Event** button(🖼️) from the toolbar.

    The "Add Calendar Event" page is displayed.

3. Follow the steps described in "Adding Calendar Events" on page 375 to complete the form.

Editing Calendar Events

Once a calendar event has been added for a calender, you may edit it to change the title, location, times, etc.

To edit a calendar event, perform the following steps:

1. Access the view calender events page, for the date that contains the event you wish to edit, as described in "Viewing Calendar Events" on page 377.

2. Click on the title of the event you wish to edit.

    The "Edit Calendar Event" page is displayed.

3. Make the necessary changes to the calendar event using the following table as a reference.

NOTE   See "Table Properties" on page 360 for additional information.

4. Click on the **Save** button(💾) to save the changes.

    The page is refreshed, and the "View Events" page is displayed with the updated event.

Deleting Calendar Events

Calendar events that are no longer needed, or don't belong to the calendar they were added to, can easily be deleted.

To delete a calendar event, perform the following steps:

1. Access the view calender events page, for the date that contains the event you wish to delete, as described in "Viewing Calendar Events" on page 377.

2. Click on the title of the event you wish to delete.

    The "Edit Calendar Event" page is displayed.

3. Click on the **Delete** button(🗑) to delete the event.

   A confirmation message is displayed.

4. Click **OK**

   The calendar event is removed from the calendar and the "View Calendar Events" page is displayed with the changes reflected.

Displaying Calendars on Web Pages

Once a calender has been created by an administrator, it can easily be inserted into a Web page.

For information about inserting calenders in Web pages using the supplied Ektron CMS200/300 custom function, refer to the Ektron CMS200/300 *Developers Reference Manual.*

Private Content & Memberships

NOTE	This feature is only available with Ektron CMS300. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

Private Content

Private content is content that is only viewable by users that are logged into the Ektron CMS200/300 Web site *and* have *at least* Read-Only permissions on the content block or folder.
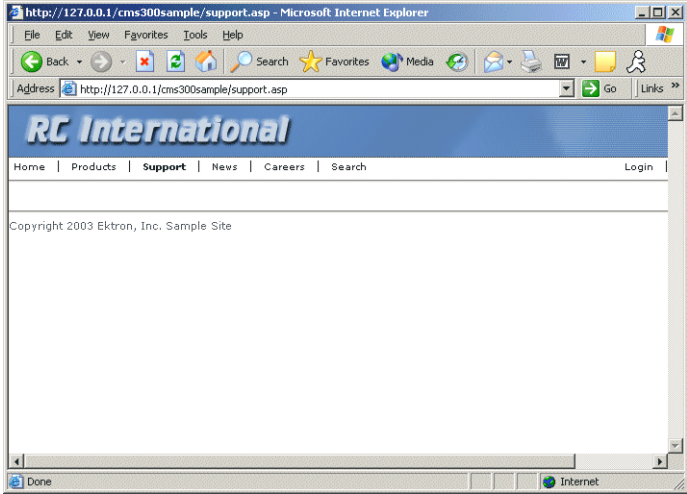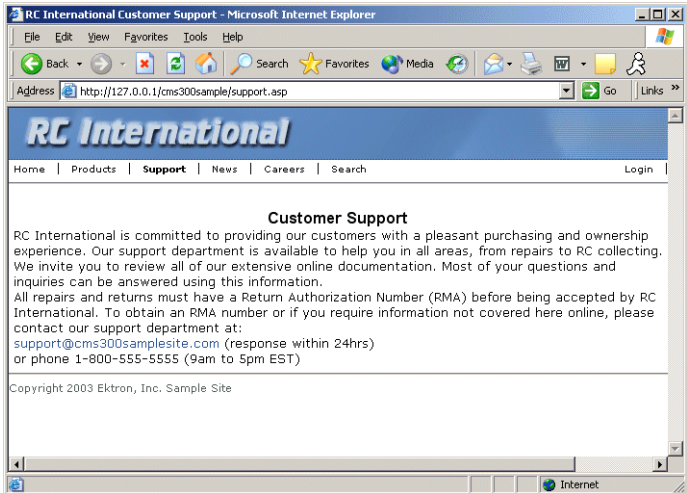
NOTE	You may only set a content block to private when inheritance is broken.
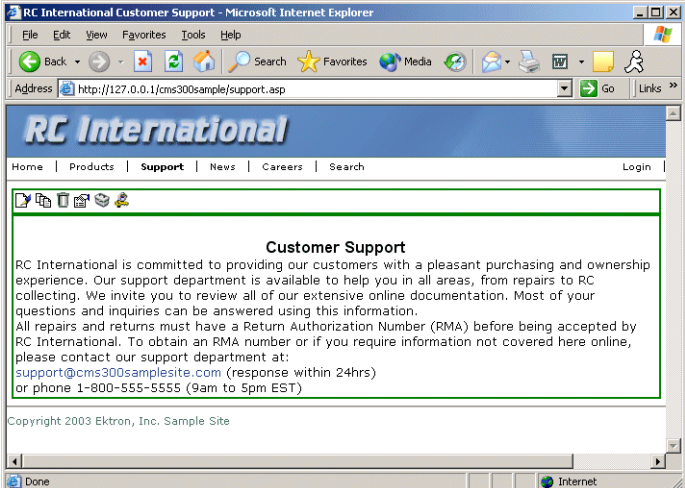
To set a content folder to be private, perform the following steps:

1. Access the permissions table for a content folder or content block in your Workarea as described in "Permissions & Approvals" on page 81.

2. Check off the box that says "This content in this folder is private and is NOT viewable on the public Web site."

   A confirmation message is displayed.

3. Click **OK** to complete the process.

   The content block or content folder is now set to private.

The following table displays three different scenarios placed on the same content block.

Scenario	Web Page Display
Web site visitor accessing a content block that is in a private content folder.	
Logged in user with read-only permissions accessing a content block that belongs to a private content folder.	

Scenario	Web Page Display
Logged in user with more than read-only permissions accessing a content block that belongs to a private content folder.	

MemberShips

What are Membership Users or User groups?

Users and user groups are given membership status when you would like to allow users to view private content, but need to be logged in. When a membership user logs into Ektron CMS200/300, all functionality is disabled for the user and they are limited to just view content.

By default, a membership user can view all public content of the Ektron CMS200/300 sample site whether they are logged in or not. The distinction comes when a content block, or folder, is set to "private." If a membership user has read-only permissions to that content block, or folder, he can only view the content if he is logged in to the Ektron CMS200/300 Web site.

Membership user groups are used to group similar membership users. *See Also:* "Private Content" on page 380

Membership User/User group Example

A typical scenario that may call the need for membership might be a "Partner" section of your Web site. Within this section, you might have private content that you only want partners to view. However, you don't want partners being able perform any sort of Ektron CMS200/300 related task with the exception of viewing the content.

In this scenario, a membership user group could be created consisting of several membership users that are specific to your partner's organization. This membership user group is then given read-only permissions to the "Partner" section which contains private content.

Any of these partners could log into Ektron CMS200/300 and view the private content. Once logged in, only a logout button is displayed.

Accessing the Membership Module Folder

The membership module folder contains all membership users and user groups that have been added to the Web site.

To access the membership module folder, perform the following steps:

1. Navigate to the workarea.

2. From the left frame of the workarea window, click on the **Modules** folder button.

   Modules folder hierarchy is displayed

3. Click on the **Membership** folder to view its sub-folders.

   The memberships folder contains two sub-folders:

Folder Name	Description	More Information
Users	Contains all membership users.	"Membership Users" on page 384
User Groups	Contains all membership user groups.	"Membership User groups" on page 386

Membership Users

The following sections explain all tasks that may be performed on membership users.

Adding Membership Users

To add a new membership user, perform the following steps:

1. Access the membership users folder in your administrator workarea as described in "Accessing the Membership Module Folder" on page 383.

2. Click on the **Add Membership User** button(🧑) from the toolbar.

   The "Add Membership User" page is displayed.

3. Complete the form using the following table as a reference.

Field	Description
Username	Enter a unique username for the membership user.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Pwd.	Re-type the password to confirm it is correct.
E-mail Address	Enter an email address for the user.

4. Click on the **Save** button(💾) from the toolbar to save your changes.

   The page is refreshed, and the view membership users table is displayed with the new user added.

Adding Membership Users to a Membership User group

See "Adding Membership Users to a Membership User group" on page 387.

Setting Permissions on Private Content for Membership Users

See "Assigning Permissions for Memberships" on page 390.

Viewing Membership User Information

To view the information of a membership user, perform the following steps:

1. Access the membership users folder in your administrator workarea as described in "Accessing the Membership Module Folder" on page 383.

2. Click on the username of the user you would like to view.

   The "View Membership User Information" page is displayed.

From this page, you can edit or delete membership users.

Editing Membership Users

To edit an existing membership user, perform the following steps:

1. Access the view membership user page of the membership user you would like to edit as described in "Viewing Membership User Information" on page 385.

2. Click on the **Edit** button(![edit icon]) from the toolbar.

   The "Edit Membership User Information" page is displayed.

3. Use the following table to assist with editing the membership user's information.

Field	Description
Username	Enter a unique username for the membership user.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Pwd.	Re-type the password to confirm it is correct.
E-mail Address	Enter an email address for the user.

4. Click on the **Update** button(![save icon]) from the toolbar to update and save the changes.

The page is refreshed and the membership user table is displayed with the updated user information.

Deleting Membership Users

To delete a membership user from the Ektron CMS200/300 Web site, perform the following steps:

1. Access the view membership user page of the membership user you would like to edit as described in "Viewing Membership User Information" on page 385.

2. Click on the **Delete** button(![delete icon]) from the toolbar.

A confirmation message is displayed.

3. Click **OK**.

The membership user is deleted and the updated membership user table is displayed.

Membership User groups

As stated earlier, membership user groups are used to group similar membership users. Utilizing membership user groups will relieve you from assigning identical permissions on many membership users.

The following section explains membership user group management.

Adding Membership User groups

To create a new membership user group, perform the following steps:

1. Access the membership user group folder in your administrator workarea as described in "Accessing the Membership Module Folder" on page 383.

2. Click on the **Add Membership User group** button( ) from the toolbar.

    The "Add a New User Group" page is displayed.

3. Complete the form using the following table as a reference.

Field	Description
User Group Name	Enter a unique name for the membership user.

4. Click on the **Save** button( ) from the toolbar to save the changes.

    The page is refreshed, and the view membership user group table is displayed with the new user group added.

Viewing Membership Users in a Membership User group

To view the information about an existing membership user group, perform the following steps:

1. Access the membership user group folder in your administrator workarea as described in "Accessing the Membership Module Folder" on page 383.

2. Click on the user group name of the membership user group you would like to view.

    The "View Users In Group" page is displayed.

Adding Membership Users to a Membership User group

To add a membership user to a membership user group, perform the following steps:

NOTE   Only membership users can be added to membership user groups.

1. Access the view membership user group page for the membership user group you would like to add a membership user to as described in "Viewing Membership Users in a Membership User group" on page 387.

2. Click on the **Add Membership User** button(🧩) from the toolbar.

   The "Add User to Group" page is displayed.

NOTE   Only membership users that do not already belong to the membership user group are displayed.

3. Click on the username of the membership user you would like to add to the membership user group.

   A confirmation message is displayed.

4. Click **OK**.

   The page refreshes and the "View Users In Group" table is updated with the selected user.

Setting Permissions on Private Content for Membership User Groups

See "Assigning Permissions for Memberships" on page 390

Editing Membership User Groups

To edit an existing membership user group, perform the following steps:

NOTE   The membership user group, "All_members," cannot be edited.

1. Access the view membership user group for the membership group you would like to edit as described in "Viewing Membership Users in a Membership User group" on page 387.

2. Click on the **Edit** button(📝) from the toolbar.

   The "Edit User Group" page is displayed.

3. Make the necessary changes to the Membership user group name.

4. Click on the **Update** button( ) from the toolbar to update and save the changes.

   The page is refreshed and the view membership user group page is displayed with the changes reflected.

Deleting Membership User from Membership User Group

To remove a membership user from a membership user group, perform the following steps:

1. Access the view membership user group page for the membership user group that contains the membership user you wish to delete as described in "Viewing Membership Users in a Membership User group" on page 387.

2. Click on the username of the membership user you wish to remove from the membership user group.

   The "View User Information" page is displayed.

3. Click on the **Delete** button( ) from the toolbar.

   A confirmation message is displayed.

4. Click **OK** to continue

   The page is refreshed and the view membership users in the membership user group page is displayed with the membership user removed from it.

Deleting Membership User groups

To delete a membership user group, perform the following steps:

1. Access the view membership user group page for the membership user group you wish to delete as described in "Viewing Membership Users in a Membership User group" on page 387.

2. Click on the **Delete** button( ) from the toolbar.

   A confirmation message is displayed.

3. Click **OK**

   The page is refreshed and the view membership user groups page is displayed with the deleted membership user group removed from the table.

Assigning Permissions for Memberships

Once you have created membership users and/or user groups, you can assign them permissions to the content folders of your choice.

This section provides information about assigning permissions for membership users and user groups.

To assign permissions to a membership user or user group to a content folder, or content block, perform the following steps:

1. Access the permissions table for the content block or content folder you would like to assign membership permissions for.

For a...	See...
Content Folders	"Setting Permissions & Approvals on Content Folders" on page 81
Content Blocks	"Setting Permissions & Approvals on Content Blocks" on page 82

2. If necessary, break the inheritance for the content block/folder.
3. Set the content folder or content block to be **Private** content.
4. Click on **View MemberShip Users** on the right end of the permissions table.

   The membership users/user groups added to the permissions table are displayed.

5. Click on the **Add** button() from the toolbar.

   The "Add Permissions" page is displayed.

6. Click on the username or user group name of the membership user or user group to add to the permissions table.

   The "Add Permissions Options" page is displayed.

7. Check off **Read-only** if you would like the membership user or user group to be able to view the private content when logged in.

8. Click on the **Save** button( ) from the toolbar to save the changes.

   The membership user or user group is saved and added to the permissions table.

Multi-Language Support

There are several methods of implementing a multi-language Web site using Ektron CMS200/300. An extremely simple solution is available through the creation of an XML content format that contains several XHTML content elements, one for each desired language. For display the desired language content can be separated from the other translations by an XSLT.

The RC International sample Web site, installed with Ektron CMS200/300, includes an extensive multi-language content sample that allows users to create and maintain a content block, summary, and metadata for multiple languages.

DIsplayed here is an example of a content block that has an XML configuration applied to it to allow different versions of the content.
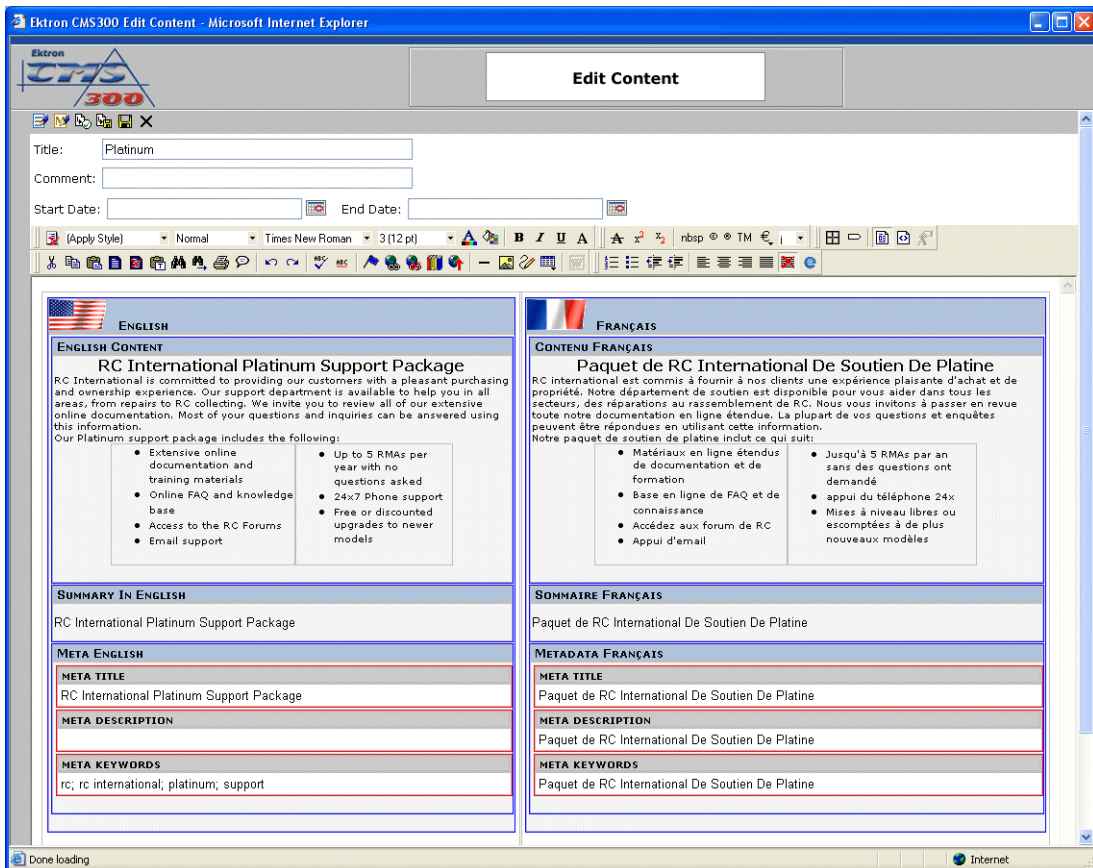
As you can see, the content block is divided into the following structure:

English Version	French Version

• English Content
• English Summary
• English Metadata
   – Title
   – Description
   – Keywords
	• French Content
	• French Summary
	• French Metadata
	   – Title
	   – Description
	   – Keywords

When different XSLTs are applied to this content, the content is displayed in the language that is defined in the XSLT.

Microsoft SharePoint Portal Server Integration

Before You Begin...

Before you begin using the Ektron CMS200/300 Web parts, it is recommended that you read and understand the following section of the manual.

This section provides information about installing and configuring the Ektron CMS200/300 Web parts, as well as overview information about Microsoft SharePoint Portal Server 2003.

Once completed, you can then move onto "Ektron CMS200/ 300 Web Parts" on page 407 for information about how to use the Ektron CMS200/300 Web parts.

Overview

Ektron CMS200/300 has been configured to easily be integrated within Microsoft's SharePoint Portal Server.

Each of Ektron CMS200/300's custom display functions, as well as some other functions, have been converted and configured to be used as Web parts within the SharePoint Portal Server.

By combining the simplicity of Ektron CMS200/300 and the power of Microsoft SharePoint Portal Server, users can easily access, share, and manage Ektron CMS200/300 Web site content from a single application.

This section explains how Ektron CMS200/300 easily, and seamlessly, integrates with Microsoft SharePoint Portal Server.

Prerequisites

Described in this section are the prerequisites for integrating Ektron CMS200/300 with SharePoint Portal Server.

Ektron CMS200/300 Server

On a server running Ektron CMS200/300, you must have a directory under your root folder called `CMS300Sample` that contains the necessary SharePoint Portal Server .aspx display pages.

These are commonly inserted into the following directory:

\CMS200/300Scripts\Portals\SharePoint2003

This is the directory that is referenced by your SharePoint Portal Server's Web.config file.

NOTE   Absence of these files will cause the Ektron CMS200/300 Web parts not to work.

These files are included in the .zip file that you received with all of the SharePoint integration files.

SharePoint Portal Server

For Ektron CMS200/300 to successfully integrate with Microsoft SharePoint Portal Server, a Web server must first be setup and configured with the following applications:

- Windows 2003 Server Operating System.
- Microsoft SharePoint Portal Server 2003.

Configuring Your SharePoint Portal Server

Ektron CMS200/300 includes a separate installation program which is used to install the necessary files onto your SharePoint Portal server, as well as update all the necessary files.

What Does the Installation Program Do?

The installation program performs many tasks including:

- Installs all Ektron CMS200/300 Web Parts.
- Registers all Web Parts in your SharePoint Web.config file.
- Adds a necessary reference to your Ektron CMS200/300 Web site within your Web.config file.
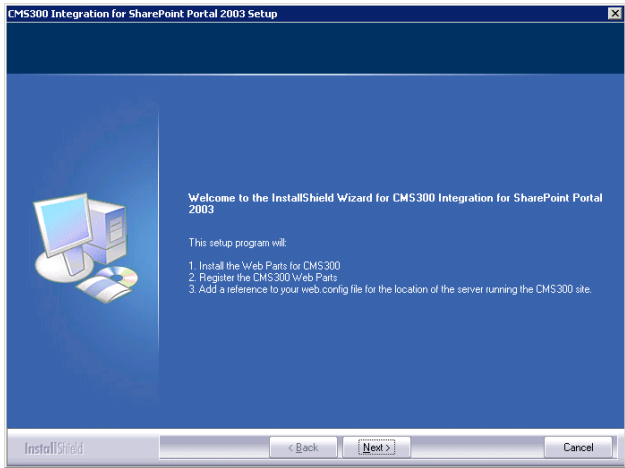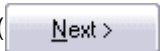
Performing the Installation
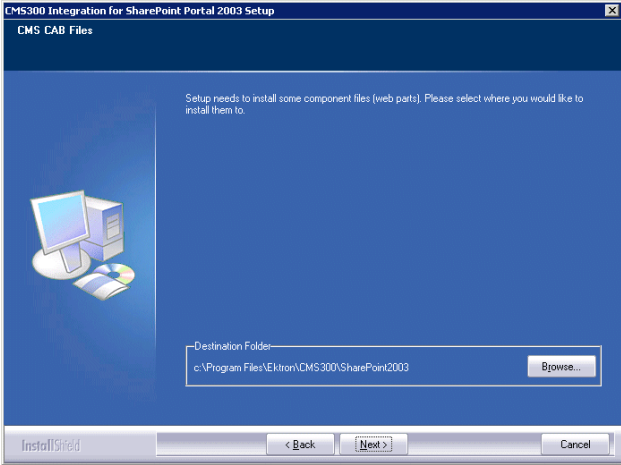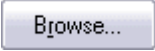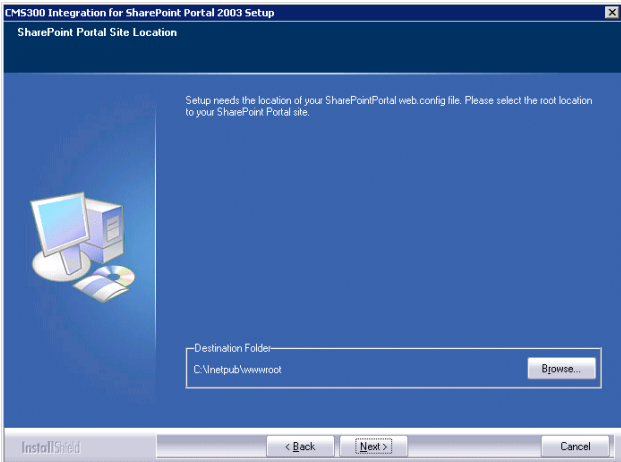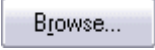
To configure your SharePoint Portal server using the Ektron CMS200/300 SharePoint integration .exe, perform the following steps:
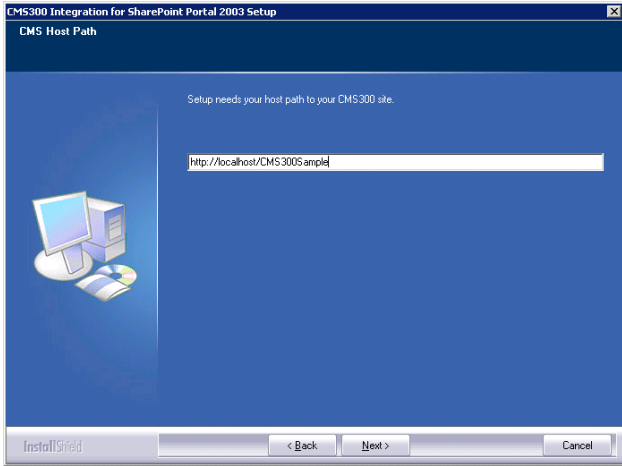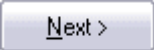
1. Begin by moving the installation file, SharePointForCMS.exe, to your SharePoint Portal Server.
2. Begin the installation by double-clicking on the .exe.

   The installation's splash screen is displayed, and installation begins.

   The following table guides you through the installation process.

Setup Screen	Action
	3. Click **Next** (Next >) to proceed. The CMS Cab Files screen is displayed.

Setup Screen	Action
	4. Specify the location on your SharePoint server where you would like to install the Ektron CMS200/300 Web Part CAB files Click **Browse** (Browse...) to specify a directory other than the default. 5. Click **Next** (Next >) to proceed. The SharePoint Portal Site Location screen is displayed.
	6. Specify the root directory of your SharePoint Portal site (the directory that contains your Web.config file). Click **Browse** (Browse...) to specify a directory other than the default. 7. Click **Next** (Next >) to proceed. The CMS Host Path screen is displayed.

Setup Screen	Action
	8. Type in the fully qualified path of your Ektron CMS200/300 Web site's root directory. For example, http://www.YourSite.com/CMS300Sample 9. Click **Next** (Next >) to proceed. The installation performs the Web part registrations. When complete, the Installation Complete screen is displayed.
	10. Click **Finish** (Finish) to exit the installation program. The necessary Ektron CMS200/300 integration files and settings are installed and configured on your SharePoint Portal Server.

Testing the Installation

Once the installation has been successfully completed, you can perform a simple test to be certain.

To test the installation, access your SharePoint Portal in a browser, and view your **Virtual Server Gallery**.

A list of all Web parts that have been added to the Virtual Server Gallery, including the Ektron CMS200/300 Web parts, are displayed at the bottom of the page
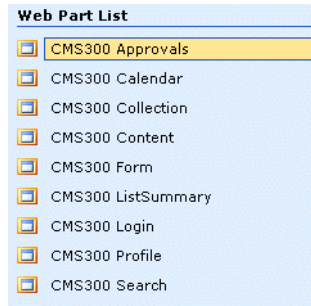
What Next?

Now that you have successfully configured your SharePoint Portal Server, you are ready to add Ektron CMS200/300 Web parts into your portal pages.

See "Microsoft SharePoint Portal Server Overview..." on page 403 for information about beginning to work with the Ektron CMS200/300 Web parts.

If the installation was not successful, see "Installation Troubleshooting" on page 399 for information about how to remedy possible problems.

Installation Troubleshooting

During the installation, you may receive messages indicating that the information that you have entered is not correct. If you decide to continue the installation process with incorrect data, it might be necessary for you to register the Ektron CMS200/300 Web parts and/or update your Web.config file manually.

The following section explains the solutions to some common problems that might occur if incorrect information was used during the installation.

Incorrect SharePoint Portal Location

If an incorrect SharePoint Portal Server path location is given, the following message is displayed.
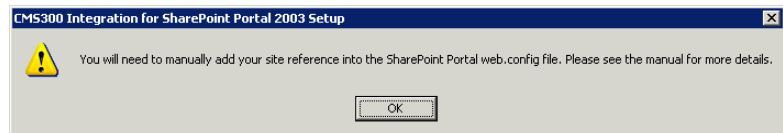
When the installation is complete, you must update your Web.config file manually (or perform the installation program again using the correct path).

See "Updating Web.config Manually" on page 400 for more information.

Incorrect Ektron CMS200/300 Host Path

If an incorrect Ektron CMS200/300 Host Path is given during the installation, the following message is displayed.
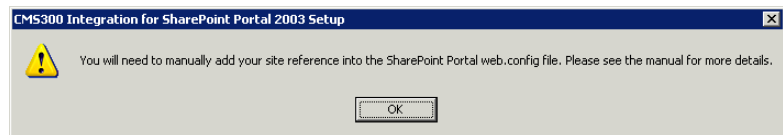
When the installation is complete, you must update your Web.config manually (or perform the installation program again using the correct path).

See "Updating Web.config Manually" on page 400 for more information.

Updating Web.config Manually

Your SharePoint Portal Server Web.config must contain all the necessary Ektron CMS200/300 information for the integration to work successfully.

There are two components of the Web.config file that must be added for the integration to work, these include:

• Ektron CMS200/300 Web parts as safe controls

- Ektron CMS200/300 site location

During the installation program, if you received a message telling you that you must update your Web.config file manually, the following section explains the tasks that you must perform.

Registering Ektron CMS200/300 Web Parts as Safe Controls

In order for SharePoint to use the Ektron CMS200/300 Web parts, they must be registered by SharePoint as safe controls.

To register the Ektron CMS200/300 Web parts as safe controls manually, perform the following steps:

1. Begin by completing the Ektron CMS200/300 SharePoint Portal Integration Installation program (this installs the files that need to be registered).

2. Access the directory where you installed the CMS Cab files to during Step 4 of the installation program described previously.

NOTE   The default location is "C:\Program Files\Ektron\CMS300\SharePoint2003\CAB"
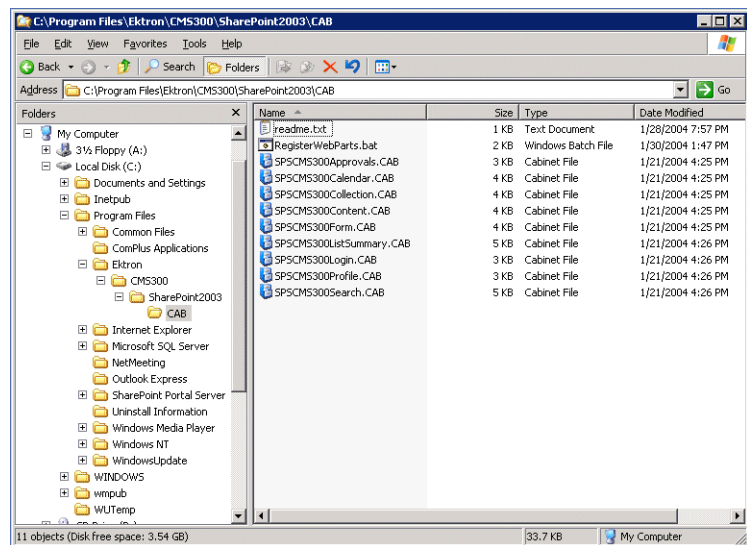
3. Double-click on **RegisterWebParts.bat** to perform the batch file that registers all the Ektron CMS200/300 Web parts.

When complete, the following lines are added to your Web.config file:

```
<SafeControl Assembly="CMS300Approvals" Namespace="CMS300Approvals" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Calendar" Namespace="CMS300Calendar" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Content" Namespace="CMS300Content" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Form" Namespace="CMS300Form" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300ListSummary" Namespace="CMS300ListSummary" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Profile" Namespace="CMS300Profile" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Search" Namespace="CMS300Search" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Collection" Namespace="CMS300Collection" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Login" Namespace="CMS300Login" TypeName="*" Safe="True" />
```

The Ektron CMS200/300 Web parts are now successfully registered, and your Web.config is updated with the Web parts registered as safe controls.

Specifying Your Ektron CMS200/300 Site Path Manually

The Web.config file must contain a reference to your Ektron CMS200/300 Web site.

During the installation if an incorrect path, or no path, was given, you need to update your Web.config file with the correct Ektron CMS200/300 site path.

To update your Web.config file with the correct Ektron CMS200/300 site path, perform the following steps.

1. Open your SharePoint Portal Server's Web.config for editing with a text editing program such as NotePad.

2. Enter the following information within the <configuration> tags of your Web.config file.

```
<appSettings>
   <add key="CMS300sitelocation" value="[CMS300SitePath]" />
</appSettings>
```

Where [CMS300SitePath] is a fully qualified path to the directory in your Ektron CMS200/300 Web server that contains the Ektron CMS200/300 display files for SharePoint.

For example, **http://www.YourSite.com/cms300Sample/cms300scripts/portals/sharepoint2003/**

3. Save and close your Web.config file

Microsoft SharePoint Portal Server Overview...

SharePoint Portal Server 2003 enables enterprises to develop an intelligent portal that seamlessly connects users, teams, and knowledge so that people can take advantage of relevant information across business processes to help them work more efficiently.

SharePoint Portal Server 2003 provides an enterprise business solution that integrates information from various systems into one solution through single sign-on and enterprise application integration capabilities, with flexible deployment options and management tools.

The portal facilitates end-to-end collaboration by enabling aggregation, organization, and search capabilities for people, teams, and information. Users can find relevant information quickly through customization and personalization of portal content and layout, as well as by audience targeting. Organizations can target information, programs, and updates to audiences based on their organizational role, team membership, interest, security group, or any other membership criteria that can be defined.

SharePoint Portal Web Page Layout

All Web pages in SharePoint have the same layout characteristics. Each Web page is comprised of the following:

1. Web Part Page
2. Web Part Zone
3. Web Part

The following graphic shows the relationship of these components on a Web page in SharePoint.
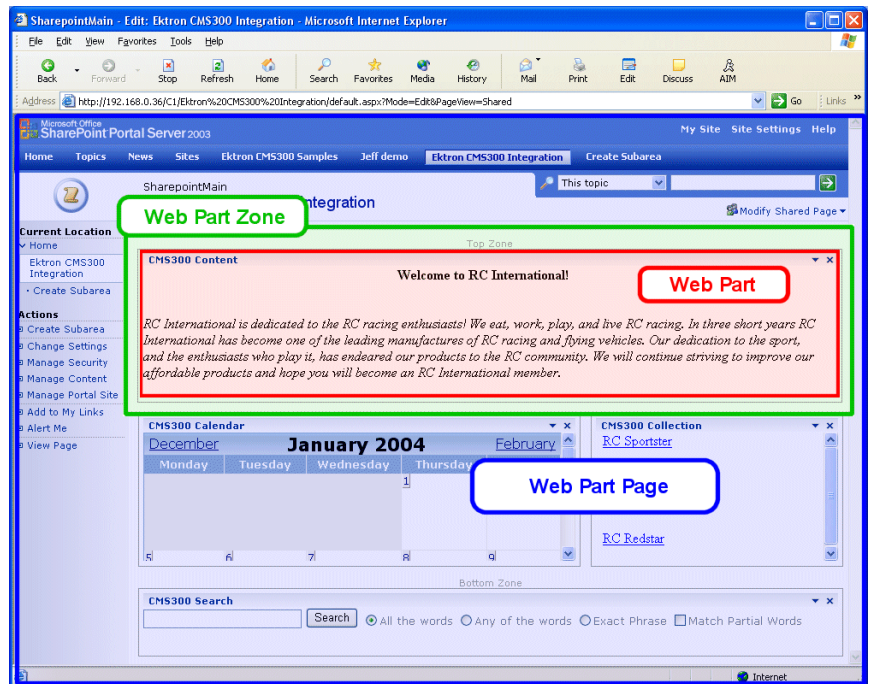
What is a "Web Part?"

Components of a SharePoint Portal page are called "Web Parts."

Microsoft defines a Web part as:

"A modular unit of information that consists of a title bar, a frame, and content. Web Parts are the basic building blocks of a Web Part Page. A Web Part is the combination of a Web Part Description file (.dwp) and a Web Part assembly file (.dll). All Web Parts are based on Web Custom Controls. "

Ektron has created a Web part for each Ektron CMS200/300 display function, as well as Web parts for other useful Ektron CMS200/300 information.

Three Types of Web Parts

In addition, there are three different types, or classifications, of Web parts:

Type	Description
Shared	A Web Part added to a Web Part Page by a user who is creating or making changes to the Web Part Page in shared view. Shared Web Parts are available to all users of a Web Part Page with appropriate permissions.
Personalized	A shared Web Part with one or more property values modified by a user who has made changes to the Web Part in personal view. The changes made to the personalized Web Part are only available to the user who made those changes. However, other users who did not make changes in personal view continue to see the shared Web Part.
Private	A Web Part that a user has added to a Web Part Page from a Web Part gallery or imported from a computer while creating or making changes to the Web Part Page in personal view. Private Web Parts are only available to the user who added or imported the Web Part. No other users can see private Web Parts. The type of Web Part you are working with can be important because: • You may have permission to modify only some types of Web Parts on certain Web Part Pages, but not on other Web Part Pages. • You may be able to connect to certain types of Web Parts on a Web Part Page, but not to other types of Web Parts on the same Web Part Page.

When properly configured, Ektron CMS200/300 Web parts are shared Web parts that can be personalized by different users (assuming they have the necessary permissions).

Web Part "Zones"

The areas, or "zones," are the locations on a SharePoint Web Parts page where Web parts can be inserted. Web part zones can contain one or more Web parts.

Microsoft defines a Web part zone as:

> "A container with a set of properties that can be configured to control the organization and format of Web Parts on a Web Part Page. Web Part zones can also be used to provide protection against changes to Web Parts."

Although their sizes are customizable, all Web part pages contains the same four Web zones.

Top Zone

Middle Left Zone	Middle Right Zone

Bottom Zone
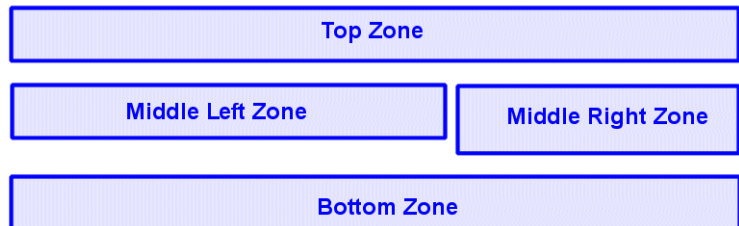
SharePoint Server Permissions

Regardless of other permissions, a SharePoint Portal Server user must have at least **Member** permissions to be able to insert and customize Ektron CMS200/300 Web parts.

These permissions are configured on the SharePoint server by the *SharePoint Portal Server* administrator, not the Ektron CMS200/300 administrator.

Refer to your SharePoint documentation for information about giving SharePoint users Member permissions.

Personal View vs. Shared View

When adding Web parts to a SharePoint Portal page, you may either insert them into a shared or personal Web page.

The following table explains the difference between the two views.

Web Page View	Description
Shared	A view of a list, document library, or Web Part Page that every user with the appropriate permissions on a site can see. The shared view of a Web Part Page uses shared property values. Changes made to a shared view apply to the list, library, or page as it appears to all users.

Web Page View	Description
Personal	A view of a list, SharePoint document library, or Web Part Page that is available only to a particular user. The personal view of a Web Part Page uses a combination of shared property values and personalized property values. Changes made to a personal view apply only to the list, library, or page in that view and are therefore visible to that user only.

Keep this information in mind when inserting Web parts.

Toggling Between Shared and Personal View

When logged in and in Edit Page mode, you can toggle between shared view and personal view by performing the following steps:

1. Click on **Modify Shared Page** or **Modify My Page** (depending on your current settings

   A sub menu is displayed.

2. Click on **Shared View** or **Personal View** to display the respective view.

   The page refreshes and the change is reflected.

3. Repeat this process to revert back to the previous view.

Ektron CMS200/300 Web Parts

When configured properly, all Ektron CMS200/300 Web parts are available to be inserted by browsing to the SharePoint Portal **Virtual Server Gallery**.

Inserting Ektron CMS200/300 Web Parts
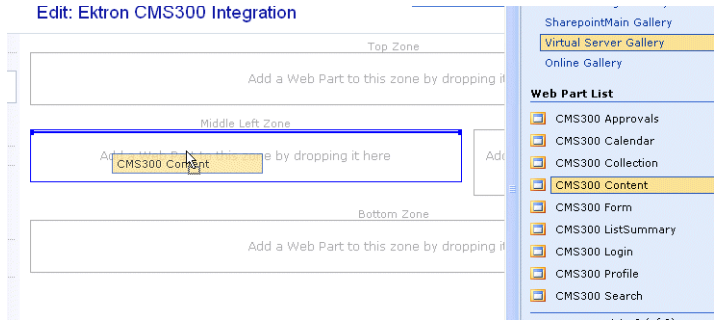
The following section explains the basics behind inserting Ektron CMS200/300 Web parts.

1. Begin by logging into your SharePoint Portal Server.

2. **Create** or **navigate** to the area that contains the Web part zones where you want to insert an Ektron CMS200/300 Web part to.
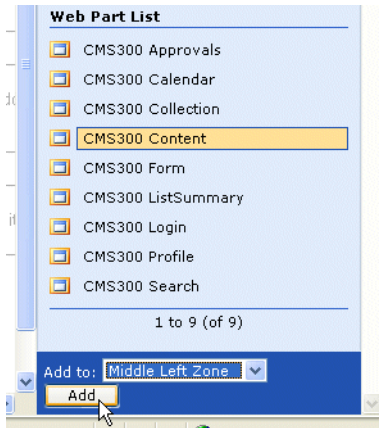
3. Click on the **Edit Page** at the bottom of the left navigation menu.

   You are now in "Edit Page Mode".

4. Click on **Modify Shared Page**, **Add Web Parts**, then **Browse**

   The Web part zones are displayed, and the Add Web Parts menu appears on the right side of the screen.

5. Click on **Virtual Server Gallery**

   A list of all Web parts that have been added to the Virtual Server Gallery, including the Ektron CMS200/300 Web parts, are displayed at the bottom of the page

NOTE	For information about each of the available Ektron CMS200/300 Web parts, see "Managing Ektron CMS200/300 Web Parts" on page 411.

6. Insert an Ektron CMS200/300 Web part one of two ways:

Method	Screenshot
• Dragging and dropping the Web part to the desired zone.	

Method	Screenshot
• Clicking on the Web part to insert, choosing the location at the bottom of the page, then clicking **Add.**	

The selected Web part is added to the selected zone.
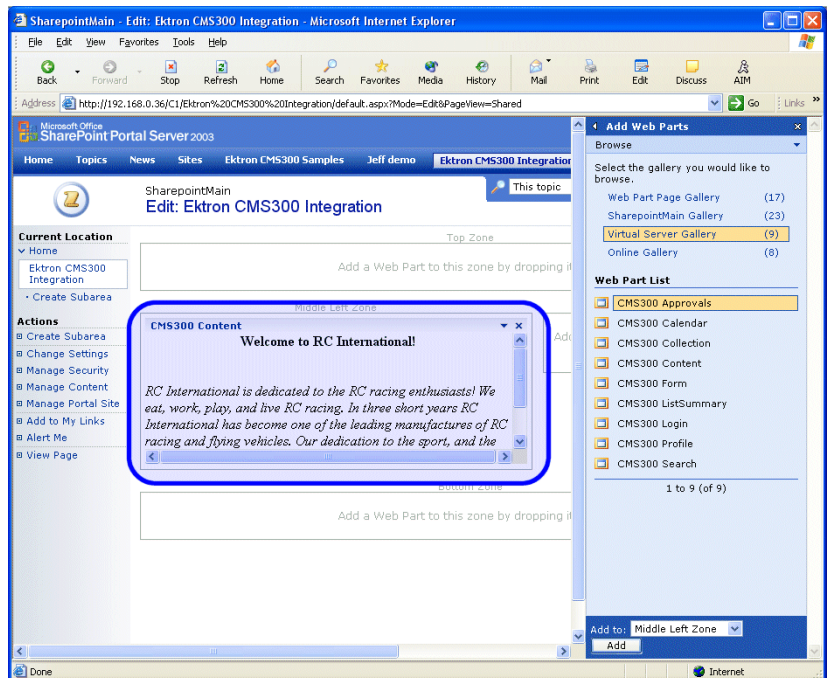
7. Continue this process until you have inserted all desired Web parts into your shared, or personal Web page.

Modifying Web Parts

All Web parts have three properties assigned to them that can be modified, including:.

Setting	Description
Appearance	Allows you to adjust appearance settings such as height, width, and title.
Layout	Allows you to adjust location, order, as well as some other layout information.
Advanced	Allows you to set advanced options.

NOTE Refer to your Microsoft SharePoint documentation for additional information about configuring these properties.
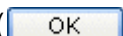
In addition to the standard properties, some Ektron CMS200/300 Web parts have additional configuration settings.

Modifying a Web Part

To modify a Web part that has been inserted into a Web part zone, perform the following steps:

1. Begin by logging into your SharePoint Portal Server.

2. **Navigate** to the area that contains the Web part zones where you want to modify an Ektron CMS200/300 Web part.

3. Click on **Edit Page** at the bottom of the left navigation menu.

   You are now in "Edit Page Mode."

4. Click on the **Down Arrow** (▼) at the top right corner of the Web part you wish to modify.

   The Web Part Menu is displayed.

5. Click on **Modify Shared Web Part**.

   The Web part is surrounded by a yellow dashed border, and the modify Web part menu is displayed on the right side of the screen.

6. Make the necessary changes to the Web part.

7. Click on the **Apply** button(Apply) for the changes to take effect without closing the menu, or click **OK** button(OK) so save and close the menu.

Managing Ektron CMS200/300 Web Parts

Ektron has created Web parts for all display functions in Ektron CMS200/300, as well as two others.

The following table lists each Web part, and its functionality.

Web Part	Description	More Information
Approvals	Displays a list of content blocks awaiting approval by the logged in Ektron CMS200/300 user.	"Approvals Web Part" on page 412
Calendar	Displays a calender created for the Ektron CMS200/300 Web site.	"Calendar Web Part" on page 412
Collection	Displays a collection, as well as its display function, for a collection created in the Ektron CMS200/300 Web site.	"Collection Web Part" on page 414
Content	Displays a content block created for the Ektron CMS200/300 Web site.	"Content Web Part" on page 417
Form	Displays a form content block created in the Ektron CMS200/300 Web site.	"Form Content Block Web Part" on page 419
Summary List	Displays a summary list for a specified content folder in the Ektron CMS200/300 Web site.	"Summary List Web Part" on page 421
Login	Displays a login button which allows users to log in, and be authorized, by the Ektron CMS200/300 Web site enabling them	"Login Web Part" on page 424
Profile	Displays configurable profile settings for the logged in Ektron CMS200/300 user.	"Profile Web Part" on page 426
Search	Displays Ektron CMS200/300 Web site search box and search results	"Search Web Part" on page 427

Approvals Web Part

When logged into Ektron CMS200/300 via Microsoft SharePoint Portal Server, the approvals Web page displays a list of the current content blocks awaiting your approval.

Displayed here is an example of the approvals Web part displayed in SharePoint Server.
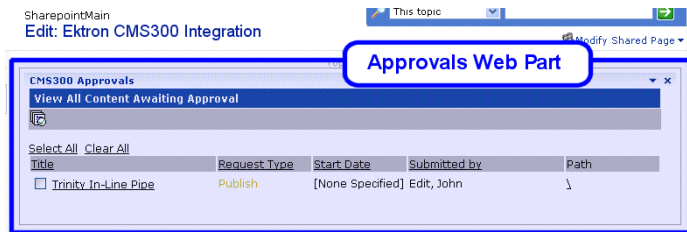
The approvals Web part is identical to the approvals report page within the Ektron CMS200/300 Workarea.

Approvals Web Part Settings

The approvals web part does not include any additional settings.

Approving Content via SharePoint

When viewing your approvals, you can approve any content block awaiting your approval by performing the same steps you would in your Ektron CMS200/300 Web site.

Calendar Web Part

The calendar web part displays an event calendar created within the Ektron CMS200/300 Web site.

DIsplayed here is an example of a calendar web part displayed in the SharePoint Portal Server.
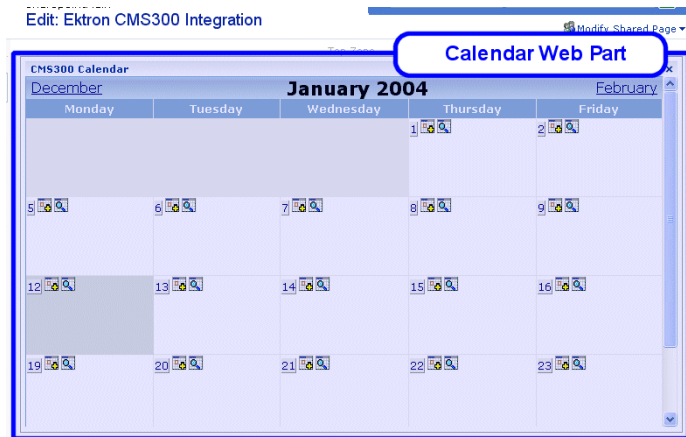
In addition to displaying the event calendar, if you are logged into the Ektron CMS200/300 Web site via SharePoint Portal Server (as displayed in the example above), then you are also given the option to add and manage calendar events (assuming you have the necessary permissions to do so).

NOTE See "Login Web Part" on page 424 for information about adding a login Web part and logging into the Ektron CMS200/300 web site via SharePoint Server.

Calendar Web Part Settings

The calendar Web part can be configured to display any event calendar from your Ektron CMS200/300 Web site.

To configure the calendar Web part, perform the following steps:
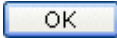
1. Access the Modify Shared Web Part area for the calendar Web part as described in "Modifying Web Parts" on page 410.

2. Minimize the **Appearance Settings**, and expand the **CMS200/300 Calendar settings**

   The "Calendar Web Part Settings" page is displayed.

3. Change the value in the **CalendarID** field to the ID number of the event calendar you wish to be displayed.

4. Click on the **Apply** button(Apply) for the changes to take effect without closing the menu.

The page is refreshed with the updated calendar displayed.

5. Make any other additional changes to the Calendar Web part, or click on the **OK** button(OK) to close the Modify Web Part area.

Clicking **OK** returns you to the Edit Page view.

Managing Calendars & Calendar Events

As stated earlier, when you are logged into the Ektron CMS200/300 Web site via SharePoint Server, you are given the opportunity to manage your calendars and calendar events.

Tasks that you can perform from the SharePoint server include, but are not limited to:

- Adding new event calendars
- Editing and deleting existing event calendars
- Adding new calendar events
- Editing, viewing, and deleting existing calendar events

As well as other tasks.

Collection Web Part

The collection Web part is used to display a collection that has been created in your Ektron CMS200/300 Web site.

Displayed here is an example of a collection Web part displayed in the SharePoint Portal Server.

In addition to displaying the collection in the portal, if you are logged into the Ektron CMS200/300 Web site via SharePoint, you may also perform all related tasks to the collections (see

Collection Web Part Settings

Once a collection Web part has been added to the portal, you may configure it to display any collection on your web site, as well as specify the display function you would like to apply to the it.

To configure the collection Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the collection Web part as described in "Modifying Web Parts" on page 410.

2. Minimize the **Appearance Settings**, and expand the **CMS200/300 Content settings**
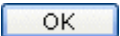
   The "Collection Web Part Settings" information is displayed.

3. Make the necessary changes to the available fields using the following table as a reference.

Field	Description
CollectionID	The ID of the collection that you wish to display in the portal.
Collection Display Function	The name of the display function that you want to be applied to the collection. Contact your Ektron CMS200/300 Web site developer for a list of available display functions.

4. Click on the **Apply** button(Apply) for the changes to take effect.

   The page is refreshed with the updated collection displayed.

5. Make any other additional changes to the collection Web part, or Click on the **OK** button(OK) to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS200/300 Content

As stated earlier, when logged into the Ektron CMS200/300 Web site via SharePoint, you may perform any task on the collection, assuming you have the proper permissions.

Some collection related tasks that you may perform include, but not restricted to:

- Adding new content to the collection.
- Re-ordering the items in the collection.
- Removing items from the collection.
- Editing the collection information.

To manage the Ektron CMS200/300 Web site collection within SharePoint, perform the following steps:

1. Login to the Ektron CMS200/300 Web site via the Login Web Part (see "Login Web Part" on page 424 for more information).

NOTE If the collection web part is in a different zone than the login web part, it may be necessary to refresh the zone the content Web part is in.

2. The collection displayed by the collection Web part is surrounded by a colored border.

3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS200/300 workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS200/300 collections.

Content Web Part

The content web part is used to display any content block created in the Ektron CMS200/300 Web site.

Displayed here is an example of a content web part displayed in the SharePoint Portal Server.

In addition to displaying the content block, if you are logged into the Ektron CMS200/300 Web site via SharePoint server, you may also manage the content (see "Managing Ektron CMS200/300 Content" on page 418 for more information).

Content Web Part Settings

The content Web part can be configured to display any content block from your Ektron CMS200/300 Web site.

To configure the content Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the content Web part as described in "Modifying Web Parts" on page 410.

2. Minimize the **Appearance Settings**, and expand the **CMS200/300 Content settings**

   The "Content Web Part Settings" page is displayed.

3. Change the value in the **ContentID** field to the ID number of the content block you wish to be displayed.

4. Click on the **Apply** button(Apply) for the changes to take effect.

   The page is refreshed with the updated content displayed.

5. Make any other additional changes to the Content Web part, or Click **OK** (OK) to close the Modify Web Part area.

    Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS200/300 Content

As stated earlier, when logged into the Ektron CMS200/300 Web site via SharePoint, you may manage content displayed by the content Web part (assuming you have permissions to do so within the Ektron CMS200/300 **Web site**).

Some content related tasks that you may perform include, but not restricted to:

*   Editing existing content, summaries, and metadata.
*   Creating new content.
*   Deleting content.
*   Viewing historical versions of content and restoring them.
*   Managing collections.

To manage the Ektron CMS200/300 Web site content within SharePoint, perform the following steps:

1. Login to the Ektron CMS200/300 Web site via the Login Web Part (see for more information).

NOTE   If the content web part is in a different zone than the login web part, it may be necessary to refresh the zone the content Web part is in.

2. The content displayed by the content Web part is surrounded by a colored border.
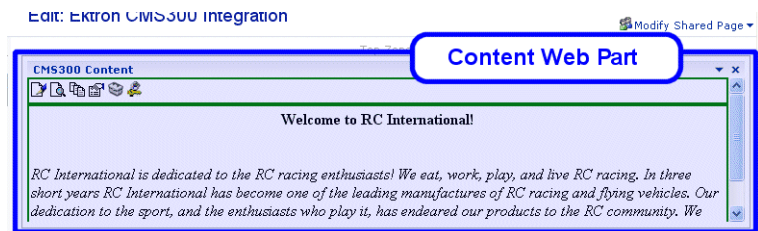
3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS200/300 workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS200/300 content.

Form Content Block Web Part

A form content block Web part is used to display an Ektron CMS200/300 form content block.

Displayed here is an example of a form content block being displayed in SharePoint as a Web part.
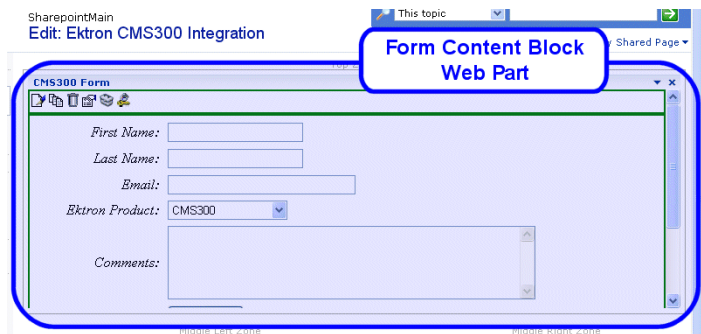
In addition to displaying the form content block, if you are logged into the Ektron CMS200/300 Web site via SharePoint server, you may also manage the form content (see "Managing Ektron CMS200/300 Form Content" on page 420 for more information).

NOTE   See "Login Web Part" on page 424 for information about adding a login Web part and logging into the Ektron CMS200/300 web site via SharePoint Server.

Form Content Web Part Settings

The form content Web part can be configured to display any form content block from your Ektron CMS200/300 Web site.

To configure the form content Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the form content Web part as described in "Modifying Web Parts" on page 410.

2. Minimize the **Appearance Settings**, and expand the **CMS200/300 Form Content settings**

    The "Form Content Web Part Settings" information is displayed.

3. Change the value in the **Form Block ID** field to the ID number of the form content block you wish to be displayed.

4. Click on the **Apply** button (Apply) for the changes to take effect.

   The page is refreshed with the updated content displayed.

5. Make any other additional changes to the Form Content Web part, or Click on the **OK** button(OK) to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS200/300 Form Content

As stated earlier, when logged into the Ektron CMS200/300 Web site via SharePoint, you may manage form content displayed by the form content Web part (assuming you have permissions to do so within the Ektron CMS200/300 **Web site**).

Some form content related tasks that you may perform include, but not restricted to:

- Editing form content.
- Modifying form processing information.
- Creating new form content

To manage the Ektron CMS200/300 Web site form content within SharePoint, perform the following steps:

1. Login to the Ektron CMS200/300 Web site via the Login Web Part (see "Login Web Part" on page 424 for more information).

NOTE   If the form content web part is in a different zone than the login web part, it may be necessary to refresh the zone the content Web part is in.

2. The form content displayed by the form content Web part is surrounded by a colored border.
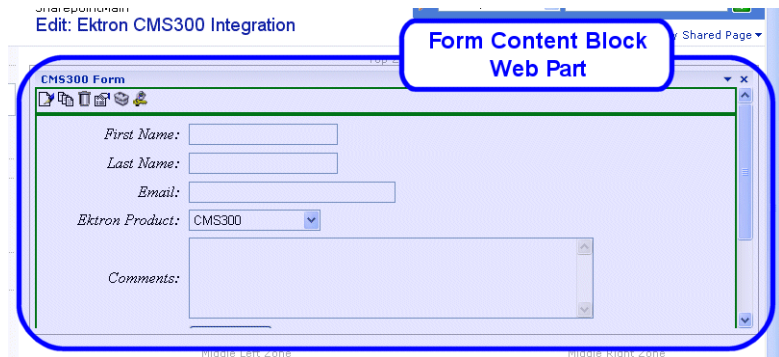
3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS200/300 workarea.

Summary List Web Part

The summary list, or list summary, web part is used to display a list of summaries for some, or all, content blocks in a specified Ektron CMS200/300 content folder.

DIsplayed here is an example of a summary list web part being displayed in the SharePoint Portal Server.

Similar to other Ektron CMS200/300 Web parts, if you are logged into the Ektron CMS200/300 Web site via SharePoint Server, you can also manage the summary list (see "Managing the Summary List" on page 424 for more information).

NOTE   See "Login Web Part" on page 424 for information about adding a login Web part and logging into the Ektron CMS200/300 web site via SharePoint Server.

List Summary Web Part Settings

The list summary Web part can be configured to fully customize the summary list.

Several options are configurable including:

- Starting folder
- Style information
- Maximum amount to display

As well as several other options.

To configure the list summary Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the content Web part as described in "Modifying Web Parts" on page 410.
2. Minimize the **Appearance Settings**, and expand the **CMS200/300 ListSummary settings**
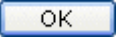
   The "List Summary Web Part Settings" page is displayed.
3. Make the necessary changes to the List Summary settings using the following table as a guide.

Field	Description	Default
Starting Folder	Ektron CMS200/300 content folder where the summary list begins to retrieve summary information from. Examples: "**\Products\RC Cars**" or "****" (root content folder)	\
Recursive	Used to specify whether the summary list will contain summary information from the starting folder's sub-folders. • **No** - *summary list is not recursive* • **Yes** - *summary list is recursive*	No
Show Summary	Used to specify if the summaries for the summary list will be displayed or not. • **No** - *summaries are not displayed* • **Yes** - *summaries are displayed*	No

Field	Description	Default
Style Information	Insert an inline style which is applied to the hyperlinks generated by the summary list. Example: **backgroundcolor:#cccccc; border:solid blue 1pt;**	
Order By	Choose how you want to order the summary list by. • **Title** - *title of the content block* • **DateModified** - *date the content was last modified* • **DateCreated** - *date the content was created* • **AuthorFname** - *first name of the last editor.* • **AuthorLname** - *last name of the last editor*	Title
Order By Asc/ Desc	Choose the direction you want to order the summary list by. • **Asc** - *sort results in ascending order (A >Z)* • **Desc** - *sort results in descending order (Z>A)*	Asc
Show Info	Choose additional information to be displayed in the summary list. • **None** - *no additional information* • **DateModified** - *date and time content was last modified* • **DateCreated** - *date and time content was created* • **AuthorFname** - *first name of the last editor* • **AuthorLname** - *last name of the last editor*	None
Maximum Number	Specify the maximum amount of results you wish to display. Note: "**0**" displays unlimited, or all, results.	0 (unlimited)

4. Click on the **Apply** button(Apply) for the changes to take effect.

   The page is refreshed with the updated summary list is displayed.

5. Make any other additional changes to the List Summary Web part, or click on the **OK** button(OK) to close the Modify Web Part area.

Clicking **OK** returns you to the Edit Page view.

Managing the Summary List

As stated earlier, when logged into the Ektron CMS200/300 Web site via SharePoint, you may manage the summary list displayed by the list summary Web part.

To manage the Ektron CMS200/300 summary list within SharePoint, perform the following steps:

1. Login to the Ektron CMS200/300 Web site via the Login Web Part (see "Login Web Part" on page 424 for more information).

NOTE If the summary list web part is in a different zone than the login web part, it may be necessary to refresh the zone the summary list Web part is in.

2. The summary list displayed by the summary list Web part is surrounded by a colored border.

3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS200/300 workarea.

Login Web Part

The login web part is used to display a login button that allows users to login to the Ektron CMS200/300 Web site via SharePoint, and be authorized to work with Ektron CMS200/300 related content.

Displayed here is an example of the login Web part displayed in the SharePoint portal server.

In this example, the **Logout**, **Workarea**, and **Preview** buttons are displayed because we are currently logged in. If we were not logged in, only a **Login** button would be displayed.

Login Web Part Settings

The login web part does not include any configurable settings.
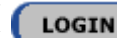
Logging Into a Ektron CMS200/300 Web Site Via SharePoint Server

As stated several times, you can log into your Ektron CMS200/300 Web site via SharePoint Portal Server, and be authorized to manage content, as well as any other task.

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

1. Navigate to the SharePoint Zone that contains the Ektron CMS200/300 Login Web part.

2. Click on the **Login** button( ).

   The "Ektron CMS200/300 Login" box is displayed.

3. Enter a valid Ektron CMS200/300 username and password in the respective fields.

4. Click on the **Login** button( ).

   The username and password is sent to the Ektron CMS200/300 server, and upon successful authorization, you will be logged into Ektron CMS200/300.

NOTE   Logging in via SharePoint does not refresh the entire page, instead, only the zone that the login web part is added to appears to be logged into. Refresh each zone, or the entire page, for the changes to take effect.

Profile Web Part

Every user that belongs to an Ektron CMS200/300 Web site has access to their user profile which allows them to view and modify information about themselves.

When logged into Ektron CMS200/300 via SharePoint, each user can access this profile information.

NOTE   As stated, you must be logged into the Ektron CMS200/300 site via SharePoint server in order to view your approvals list. See "Login Web Part" on page 424 for additional information.

Displayed here is the profile Web part displayed in the SharePoint portal server logged in as the user **John Edit**.
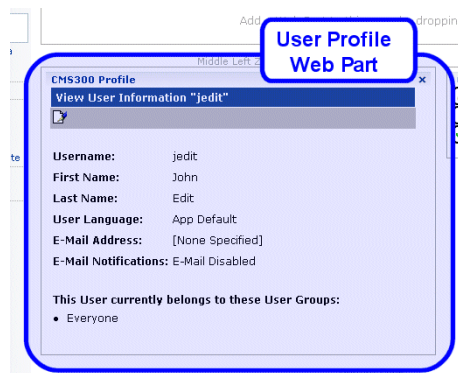
Although you cannot modify the actual profile Web part itself, you can edit and update your Ektron CMS200/300 user profile information (see "Editing Profile Information" on page 426 for additional information).

Profile Web Part Settings

The profile web part does not include any configurable settings.

Editing Profile Information

All Ektron CMS200/300 users can update their profile information directly from SharePoint.

To update Ektron CMS200/300 profile information, perform the following steps:

1. Access the SharePoint portal page that contains the Ektron CMS200/300 profile Web part.
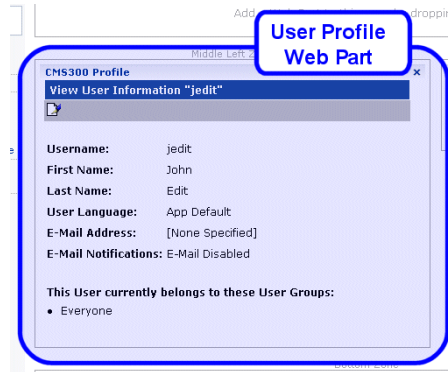
2. Click on the **Edit** button(![Edit icon]) from the toolbar on Ektron CMS200/300 profile Web part menu.

   The "Edit User Information" page is displayed.

3. Make the necessary changes to your user information.

4. Click on the **Update** button(![Update icon]) from the toolbar on Ektron CMS200/300 profile Web part menu to save the changes.

   The Web part is refreshed, and the view user information page is displayed with the updated information.

Search Web Part

The search Web part allows you to insert a search text box and search button that will search your Ektron CMS200/300 Web site directly from SharePoint.

Displayed here is an example of a search Web part inserted into a SharePoint portal server page.

When visitors to the SharePoint portal page access this search Web part, they can perform a search on your Ektron CMS200/300 Web site.

Search Web Part Settings

The search Web part can be configured to fully customize how the search is displayed in the portal, as well as the functionality of the search.

Several options are configurable including:

- Starting folder.
- Recursive search.
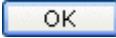- Maximum amount of results to display.

As well as several other options.

To configure the search Web part, perform the following steps:
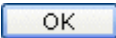
1. Access the Modify Shared Web Part area for the content Web part as described in "Modifying Web Parts" on page 410.

2. Minimize the **Appearance Settings**, and expand the **CMS200/ 300 Search settings**

   The "Search Web Part Settings" page is displayed.

3. Make the necessary changes to the search settings using the following table as a guide.

Field	Description	Default
Starting Folder	Ektron CMS200/300 content folder where the search begins to retrieve results from. Examples: "**\Products\RC Cars**" or "****" (root content folder)	\
Recursive	Used to specify whether the search will search the starting folder and its sub-folders or only the starting folder • **No** - *search only searches the starting folder* • **Yes** - *search will search the starting folder and its sub-folders*	No
Target Page	When the search is performed, the target page is the Web page that will contain all the results.	search-display.aspx
Text Box Size	The size of the search text box when displayed.	25
Maximum Characters	The maximum amount of characters the search text box will accept.	200
Button Text	The text that is displayed on the search button.	Search
Font Face	Defines the font face of the search options that are displayed with the search box.	Verdana
Font Color	Defines the font color of the search options that are displayed with the search box.	#808080
Font Size	Defines the font size of the search options that are displayed with the search box.	2
Horizontal	Specifies the orientation of the search text box and search options. • **No** - *search options are lined up vertically.* • **Yes** - *search options are lined up horizontally.*	No
Return: Maximum Results	Allow you to control the maximum amount of search results that are displayed. Note: "**0**" displays unlimited, or all, results.	0

Field	Description	Default
Return: Style Info	Insert an inline style which is applied to the search result hyperlinks. Example: **backgroundcolor:#cccccc; border:solid blue 1pt;**	
Return: Show Date	Specify if you want the search results to also display the date and time they were last edited by an Ektron CMS200/300 user.	No

4. Click on the **Apply** button(Apply) for the changes to take effect.

   The page is refreshed with the updated search Web part is displayed.

5. Make any other additional changes to the search Web part, or click on the **OK** button(OK) to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Performing a Search

When the search Web part is inserted into your SharePoint Portal page, you can perform a search.

To perform a search, follow these steps:

1. Access the SharePoint portal page that contains the Ektron CMS200/300 search Web part.

2. Enter your search criteria in the search text box.

3. Perform the search by clicking **Search**

   The search is performed, and all the content on your Ektron CMS200/300 Web site that matched the criteria is displayed.

Plumtree Portal Support

Overview

The Plumtree Portal provides a centralized view for disparate information delivered from a variety of applications. Plumtree provides a facility known as "Gadgets" to achieve this integration. A Gadget is a web component implemented on a remote server, which allows user interaction within the portal.

Displayed below is a screen shot of a the Ektron CMS200/300 Gadgets in a Plumtree Portal.
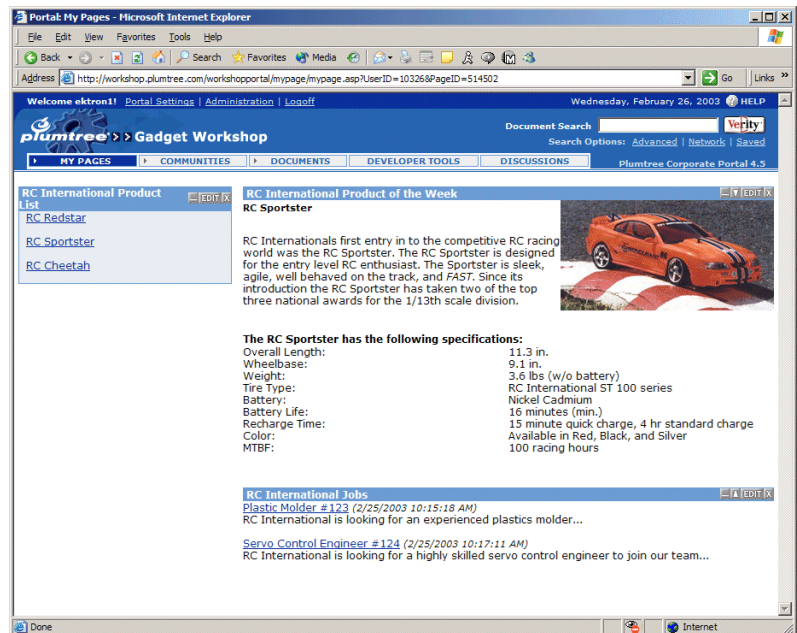
All content, collections, and summary lists that are displayed via the Gadgets in the portal is called directly from your Ektron CMS200/300 Web site. Since the content comes directly from your Web site, the content in the portals is always up-to-date with the content on your Web site.

Fundamentals

A Gadget is a web component, in our case an .asp page, that returns HTML/XML to the portal for display within a table cell. The portal passes information to the Gadget regarding configuration, user information, administration settings, etc. through the http header. The Gadget can access this information easily by using the "Plumtree ASP GDK". The Gadget definition allows five types of configuration options, and Ektron's implementation uses two of these options.

1. Administrative Preferences.
2. Gadget Preferences.

Administrative Preferences

Used to modify administrative settings. Administrative settings apply to a particular Gadget, but for all instances of that Gadget.

For instance, the ListSummary Gadget has an administrative setting for the maximum number to return from the query. If an admin sets this value to 5, then every instance of the Gadget would return no more than 5 results.

The administrative settings can only be accessed through the administrator section for the Gadgets.

Gadget Preferences

Used to modify Gadget settings. Gadget settings apply to one user's preferences on a particular instance of the Gadget.

For instance, the ListSummary Gadget has a Gadget setting to allow the user to turn on/off the display of the summary information associated with a particular content if the Gadget is configured to accept Gadget settings.

The portal will display an "edit" button on the top right corner of the Gadget's display area if it supports Gadget Preferences.

Ektron's Gadgets

Ektron has implemented three generic Gadgets to expose key data retrieval functionality. The Gadgets construction allows developers to easily implement specific Gadgets by:

- Making a copy of the appropriate Gadget file.
- Setting the "bUseDefines" boolean to true.
- Hard coding the parameter defines for the Gadget.

This simplifies the implementation and hence freeing the developer from having to deal with the administrator and Gadget preferences configuration.

ListSummary

Exposes the applicationAPI.asp function ecmListSummary as a Gadget. The Gadget supports both administrative and Gadget settings.

It is composed of two files:

1. listsummary_gadget.asp
2. listsummary_gadgetsettings.asp

listsummary_gadget.asp

This is the actual Gadget file which wraps the ecmListSummary function and is called by the portal each time information is needed.

It uses the following parameters:

Parameter	Type of Setting	Description
Folder	Administrative	Specifies which CMS folder to use.
Recursive	Administrative	Allows sub-folder information to be used.
ShowSummary	Gadget	Enables summary display information.

Parameter	Type of Setting	Description
OrderBy	Gadget	Sorts order for results.
ShowInfo	Gadget	Display extra content information.
MaxNumber	Administrative/Gadget (admin setting overrules Gadget setting if Gadget setting is higher)	Max number of entries to return.
Open Link In New Window	Gadget	Specifies whether the content should be displayed in a new window or in the current browser window.

listsummary_gadgetsettings.asp

This is the settings file associated with the ListSummary Gadget. This file configures itself based on whether an admin or user is accessing it.

If an admin accesses the administrator settings through the portal administrator site, only folder, recursive and maxnumber are presented. If a user accesses the settings from the "edit" button on the Gadget menu bar, showsummary, orderby, showinfo, maxnumber, open link in new window are presented

Collection

Exposes the applicationAPI.asp function ecmCollection as a Gadget. The Gadget supports both administrative and Gadget settings.

It is composed of two files:

1. collection_gadget.asp
2. collection_gadgetsettings.asp

collection_gadget.asp

This is the actual Gadget file which wraps the ecmCollection function and is called by the portal each time information is needed.

It uses the following parameters:

Parameter	Type of Setting	Description
CollectionID	Administrative	The id of the collection to display.
DisplayFunction	Administrative	The function to display the results.
Open Link In New Window	Gadget	Specifies whether the content should be displayed in a new window or in the current browser window.

collection_gadgetsettings.asp

This file configures itself based on whether an admin or user is accessing it. If an admin accesses the administrator settings through the portal administrator site, only collectionid and displayfunction are presented. If the user accessed the settings from the "edit" button on the Gadget menu bar, open link in new window is presented.

Content

Exposes the applicationAPI.asp function ecmContent as a Gadget. The Gadget supports only administrative settings

It is composed of two files:

1. content_gadget.asp
2. content_gadgetsettings.asp

content_gadget.asp

This is the actual Gadget file which wraps the ecmContent function and is called by the portal each time information is needed.

It uses the following parameter:

Parameter	Type of Setting	Description
ContentID	Administrative	The id of the content to display.

content_gadgetsettings.asp

> This is the settings file associated with the content Gadget. This can only be accessed through the portal administrator site. The file presents the admin with the ability to select the content id.

What's Installed With Ektron CMS200/300?

> During a default installation of Ektron CMS200/300, the three Gadgets, mentioned earlier, will be installed to the following directory:

```
C:\Inetpub\wwwroot\CMS200/300Sample\CMS200/
300Scripts\Portals\Plumtree
```

> **NOTE** For the gadgets to work properly it will be necessary to download and install the "Plumtree ASP GDK" on your Ektron CMS200/300 Web server.

> **NOTE** The pages can be tested independent of the portal by setting the bUseDefines to true and accessing the page from a browser.

Portal Registration

> Plumtree provides a workshop facility for developing Gadget:

> **http://workshop.plumtree.com.**

> **NOTE** During the registration of the Gadget, as well as the general use, the Web server that is running Ektron CMS200/300 and sending information to the portal must be outside a firewall.

Registering a Gadget to the Portal

> Once you have installed Ektron CMS200/300, the Plumtree GDK for ASP, and have logged into your portal, you may begin the process of registering the Gadgets to the portal.

> To register a Gadget in the Portal, you need to access and perform the Add Gadget Wizard which will assist you through the process.

Accessing the Add Gadget Wizard

To access the Add Gadget Wizard:

1. Access the Web page http://workshop.plumtree.com and log in using a valid username and password.
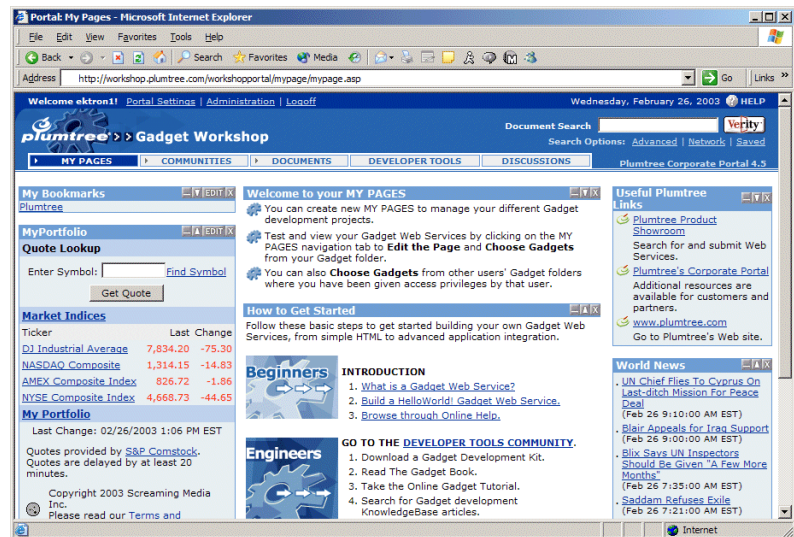
2. Click on the **Administration** menu link at the top of the portal.

   The "Portal Administration" page is displayed.

3. Click on the **Gadgets** link in the Administration Menu on the left side of the page.

   The Gadgets menu expands and the folders of gadgets are displayed on the right side of the screen.

4. Click on **Add Remote Gadget** from the Administration Menu.

   The "Add Gadget Wizard" is displayed.

The next section will assist you with adding Gadgets using the Add Gadget Wizard.

Using the Add Gadget Wizard

The Add Gadget Wizard allows you to easily register your Ektron CMS200/300 Gadgets to the portal.

To register a Gadget using the Add Gadget Wizard, perform the following steps:

1. Begin by accessing the Add Gadget Wizard as described in "Accessing the Add Gadget Wizard" on page 438.

2. Enter a name and description for the Gadget you are registering.

3. Click **Next >>**

   The "HTTP Configuration" page is displayed.

4. Use the following table to assist you with the HTTP Configuration page.

Field	Description
Remote Gadget URL	Enter the URL for the Gadget. *http://<domain>/CMS200/300Sample/CMS200/300Scripts/portals/plumtree/ <gadget>.asp*
Gateway URL Prefixes	Specifying a Gateway URL ensures that proper content will be displayed in the portal. *http://<domain>/CMS200/300Sample/*

For this example, we will be using:

Field	URL
Remote Gadget URL	http://www.YourSite.com/CMS200/300Sample/CMS200/300Scripts/portals/plumtree/ listsummary_gadget.asp
Gateway URL Prefixes	http://www.YourSite.com/CMS200/300Sample/

5. Click **Next >>**

   The "HTTP Gateway Caching" page is displayed.

6. Click **Next >>** to continue since no configuration settings need to be made here.

   The "Alternative Browsing Devices" is displayed.

7. Click **Next >>** to continue since no configuration settings need to be made here.

   The "Alignment and Administrative Preferences" page is displayed.

8. Use the following table to assist you with the "Alignment and Administrative Preferences" page

Field	Description
Alignment	specify whether this Gadget appears in the narrow column or the wide column. Ektron recommends: • *ListSummary Gadget - Wide* • *Content Gadget - Wide* • *Collection Gadget - Wide or Narrow*
This Gadget supports administrative preferences	Check off the box if the Gadget supports administrative preferences. *All Ektron CMS200/300 Gadgets support administrative preferences.*
Administrative Preferences URL	Enter the URL of the page that takes these preferences. *http://<domain>/CMS200/300Sample/CMS200/300Scripts/portals/ plumtree/<gadgetsettings>.asp*

For this example, we will be using:

Field	Entered
Alignment	Wide
This Gadget supports administrative preferences	Yes (checked off)
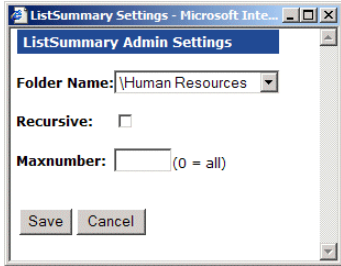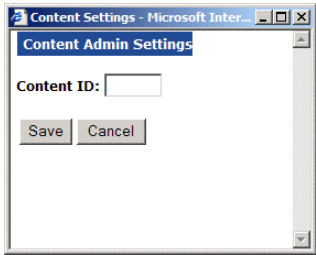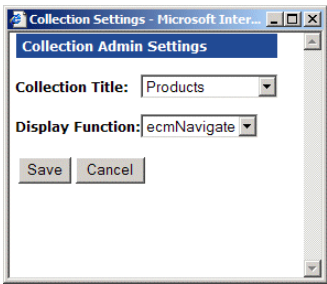
Field	Entered
Administrative Preferences URL	*http://www.YourSite.com/CMS200/300Sample/ CMS200/300Scripts/portals/plumtree/ listsummary_gadgetsettings.asp*

NOTE For other Ektron CMS200/300 Gadgets, use the following: instead
- Content Gadget - content_gadgetsettings.asp
- Collection Gadget - collection_gadgetsettings.asp

9. Click **Here to Edit the Administrative Preferences** link.

    The "Admin Settings" page for the Gadget is displayed in a new window.

Gadget	Admin Settings Page	Settings
List Summary		• **Folder Name** - Specify the Ektron CMS200/300 content folder to use. • **Recursive** - Check off to also use the specified folder's sub-folders. • **MaxNumber** - Specify the maximum number of results to display.
Content		• **Content ID** - Enter the ID number of the content block from your Ektron CMS200/300 Web site that will be displayed in the portal.

Gadget	Admin Settings Page	Settings
Collection		• **Collection Title** - Select the collection from your Ektron CMS200/300 Web site that will be displayed. • **Display Function** - Select the display function that is used to format the display of the collection.

10. Click **Save**.

   The window closes and you are returned to the "Alignment and Administrative Preferences" page.

11. Click the **Next >>**

   The "User Personalization" page is displayed.

12. Use the following table to assist you with the User Personalization page.

Field	Description
This gadget supports user personalization	Check off this box if the Gadget you are registering supports user personalization. Note: Only the ListSummary and Collection gadgets support user personalization. The Content Gadget does not.
Gadget Preferences URL	Enter the URL of the page that takes these preferences. *http://<domain>/CMS200/300Sample/CMS200/300Scripts/portals/ plumtree/<gadgetsettings>.asp*

For this example, we will be using:

Field	Entered
This gadget supports user personalization	Yes (checked off)

Field	Entered
Gadget Preferences URL	*http://www.YourSite.com/CMS200/300Sample/CMS200/300Scripts/ portals/plumtree/listsummary_gadgetsettings.asp*

NOTE   For the Ektron CMS200/300 Collection Gadget, use collection_gadgetsettings.asp

13. Click the **Next >>**

    The "User Information" page is displayed.

14. Click **Next >>** to continue since no configuration settings need to be made here.

    The "Community Settings" page is displayed

15. Click **Next >>** to continue since no configuration settings need to be made here.

    The "Security Settings" page is displayed.

16. Click **FINISH** to finish the wizard since no configuration settings need to be made here

    A list of Gadgets you have added is displayed, including the one you just registered.

17. Repeat steps 1-17 to register additional Ektron CMS200/300 Gadgets to your portal.

Once added to the portal, the Gadgets will appear in your username folder.
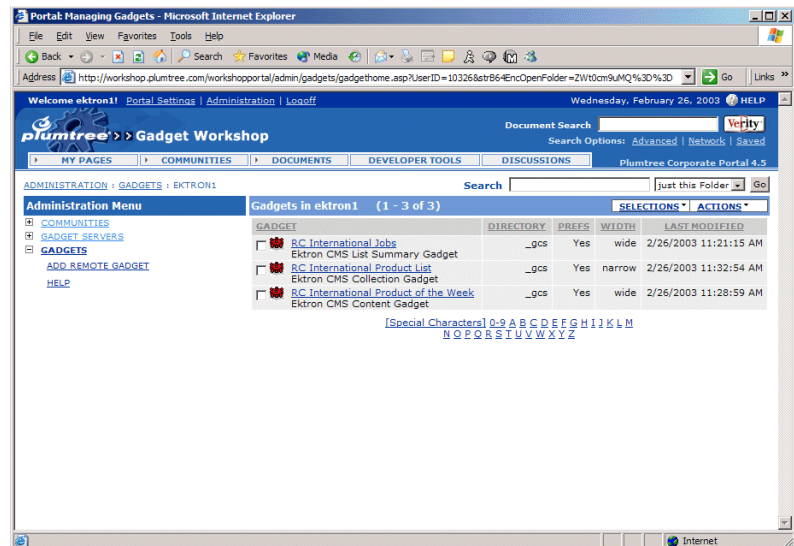
Adding a Gadget to a Page

Once you have registered one or more of the Ektron CMS200/300 Gadgets, you can add them to pages in the portal.

You may either add the Gadgets to an existing page, or create a new page with the Gadgets in it.

Adding Gadgets to a New Page

To add a gadget to a new page, perform the following steps:

1. Access the Web page http://workshop.plumtree.com and log in using a valid username and password.

NOTE If you do not already have a username and password, you can easily create one by clicking on the "Create New Account" button on the login page.

2. Follow the path: **My Pages > Create New Page** and click on **Create New Page.**

    The "Create New Page" wizard is displayed.

3. Enter a page name in the given field.

4. Click **NEXT >>**

    The "Choose Your Gadgets" page step is displayed.

5. Click on your username folder.

    A list of all gadgets that you have registered in the portal is displayed.

6. Check off the boxes next to the Gadget's that you would like to add to your new page.

NOTE   You may preview a Gadget by clicking on the corresponding Preview link.

7. Click **ADD TO MY PAGE >>**

    All selected Gadgets are listed in the "Gadgets On Your Page" list on the right side of the screen.

8. Once you have selected all the Gadgets you would like to add to your new page, click the **NEXT >>** button.

    The "Personalize Your Layout" step is displayed.

9. Personalize your layout by choosing the amount of columns on the page and location of each gadget.

10. Click **FINISH**.

The new page is displayed in the portal.
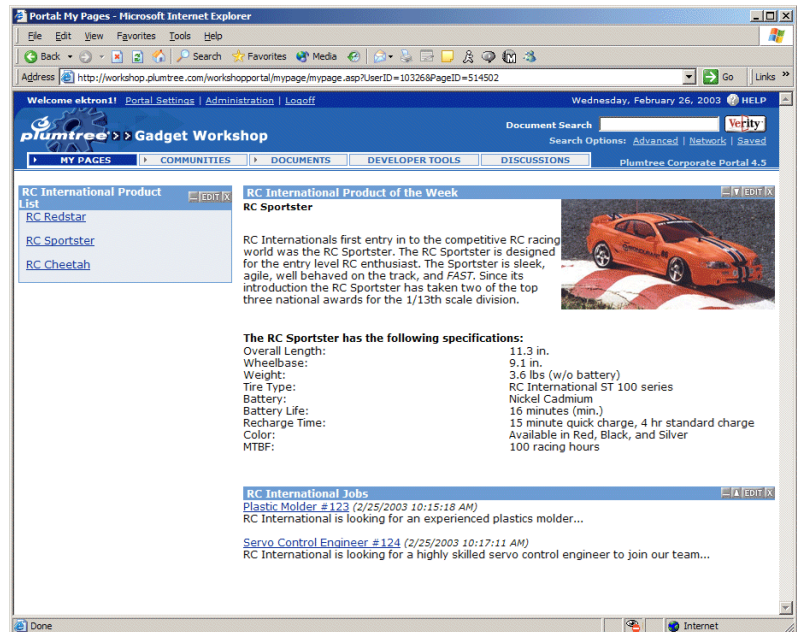
From here, you can set user preferences on List Summary and Collection Gadgets. See "Gadget Preferences" on page 447 for additional information.

Adding Ektron CMS200/300 Gadgets to Existing Pages

1. Access the Web page http://workshop.plumtree.com and log in using a valid username and password.

NOTE   If you do not already have a username and password, you can easily create one by clicking on the "Create New Account" button on the login page.

2. Select the page you would like to add the Gadget to from the My Page menu.

The selected page is displayed.

3. Follow the path **My Pages > Edit This Page** then click on **Choose Gadgets**.

The "Choose Gadgets" page is displayed.

4. Click on your username folder.

A list of the Gadgets that you have registered is displayed.

5. Check off the box(es) next to the Gadgets that you would like to add the page.

6. Click **ADD TO MY PAGE >>**

   The "Gadgets on Your Page" list on the right side of the page is updated with the new Gadgets.

7. When finished with adding Gadgets to your page, either:

   •Click **NEXT >>** to also edit the layout and proceed with the next step.

   •Click **FINISH** to save the page without changing the layout and skip the rest of the following steps.

8. On the "Edit Layout" page, make changes to the layout by specifying the amount of columns as well as the overall layout.

9. Click **FINISH**

   The page is now displayed in the portal with the added Gadget(s).

From here, you can set user preferences on List Summary and Collection Gadgets. See "Gadget Preferences" on page 447 for additional information.

Accessing Settings

Gadget Preferences

To access the Gadget Preferences page for these Gadgets, perform the following steps:
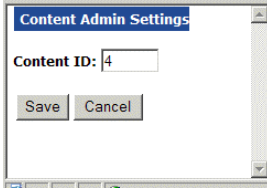
1. Navigate to a page in the portal that contains either the Ektron CMS200/300 List Summary or Collection Gadget.

2. Click **Edit** on the top right corner of the Gadget.

The Edit Gadget Settings page is displayed.

Gadget	Settings Page	Description
List Summary		• **ShowSummary** - check off to display the summaries for the content. • **OrderBy** - Select how the results will be ordered. • **ShowInfo** - Select which type of information will be displayed with the results • **MaxNumber** - Specify the maximum amount of results that will be displayed (cannot exceed admin settings) • **Open Links In New Window** - Check off to force links to open in a new window.
Collection		• **Open Links In New Window** - Check off to force links to open in a new window.

Gadget	Settings Page	Description
Content (Admin only)	Content Admin Settings Content ID: 4 Save Cancel	• **Content ID** - Specify the ID number of the content block that will be displayed.

3. Click **Save**.

   The page now displays the Gadgets with the updated settings.
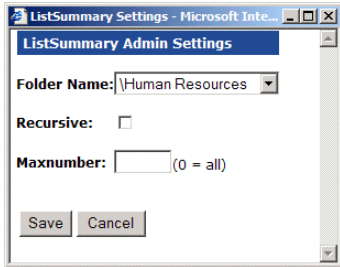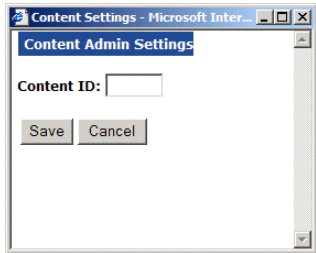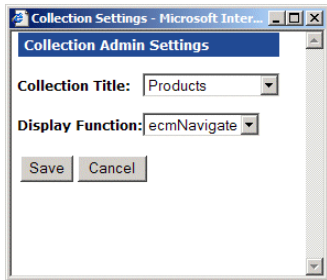
Administrator Preferences

To access the administrator settings for the Gadgets:

1. Click on the **Administration** menu link at the top of the portal.

   The "Portal Administration" page is displayed.

2. Click on the **Gadgets** link in the Administration Menu on the left side of the page.

   The Gadgets menu expands and the folders of gadgets are displayed on the right side of the screen.

3. Click the "Username" folder in the Folders of Gadgets list.

   All Gadgets that belong to the folder are displayed.

4. Click the name of the Gadget you would like to access the administrative preferences for.

   The "Gadget Editor" page is displayed.

5. Click on **Alignment and Administrative Preferences**.

   The "Alignment and Administrative Preferences" page is displayed.

6. Click on **Click Here to Edit the Administrative Preferences**.

The "Admin Settings" page for the Gadget is displayed in a new window.

Gadget	Admin Settings Page	Settings
List Summary		• **Folder Name** - Specify the Ektron CMS200/300 content folder to use. • **Recursive** - Check off to also use the specified folder's sub-folders. • **MaxNumber** - Specify the maximum number of results to display.
Content		• **Content ID** - Enter the ID number of the content block from your Ektron CMS200/300 Web site that will be displayed in the portal.
Collection		• **Collection Title** - Select the collection from your Ektron CMS200/300 Web site that will be displayed. • **Display Function** - Select the display function that is used to format the display of the collection.

7. Make the necessary changes.

8. Click the **Save**.

You are returned to the "Alignment and Administrative Preferences" page.

9. Click the **FINISH**.

   You return to the "Gadgets in Your Folder" page.

10. To view the changes, view the Gadgets on your Pages.

Web Services

Web Services are reusable software components that can be consumed over the Web by means of standard Internet technologies. Mechanisms exist to publish and discover Web Services on the Web, allowing users to locate and integrate them into their applications.

A Web Service is comprised of one or more methods that expose functionality. A Web Service can be thought of as an Application Program(ming) Interface (API), the one big difference being, consumers can access the service using Simple Object Access Protocol (SOAP) over HTTP.

SOAP is an XML based lightweight protocol that defines the message format for Web Services, which allows heterogeneous systems to communicate with each other in a standard way. Seeing Web Services are based on ubiquitous technologies, they have been quickly accepted for the interchange of data.

For information about implementing Ektron CMS200/300's Web services support for your Web site, refer to "Web Services" in the Ektron CMS200/300 *Developer's Reference Manual.*

Syndicating Web Content as RSS

RSS stands for Really Simple Syndication, a common method of syndicating Web content as an XML document. There are several versions of RSS. Ektron has implemented version 2.0.

In Ektron CMS200/300, you use RSS to prepare a collection list or a list summary for reading by an *aggregator*. An aggregator consumes an RSS feed and displays it to the user. (An aggregator is similar in function to a portal.) There are several popular aggregators, including:

- AmphetaDesk (http://www.disobey.com/amphetadesk/)
- NewzCrawler (http://www.newzcrawler.com/).

For information about how to syndicate Ektron CMS200/300 as RSS, refer to "Syndicating Web Content as RSS," in the Ektron CMS200/300 *Developer's Reference Manual.*

Load Balancing

As described earlier in this manual, setting up load balance path via Ektron CMS200/300 is easy to do using the interface supplied in the Library management section of the Administrator workarea.

Why Do I Need Load Balancing?

When used properly, load balancing is an extremely efficient and time saving tool for your Ektron CMS200/300 driven Web site. Instead of uploading and image or file on each Web server that makes up your Web site, you will only need to upload once. The load balancing feature will replicate the image or file in each of the directories that are specified by Ektron CMS200/300.

How Do I Configure Load Balancing?

Setting up Ektron CMS200/300 for load balancing, however, requires additional setting up outside of Ektron CMS200/300. Some of the tasks that will need to be performed include:

- Setting up Ektron CMS200/300 on multiple Web servers, and sharing one database.
- Creating virtual directories pointing to the folders where images and files will be uploaded to.
- Setting up load balance paths in Ektron CMS200/300 as described in "Load Balancing" on page 153

In the following chapter, we will look at the configurations that must be made to your Web servers for load balancing to work efficiently and properly.

Ektron CMS200/300 On Two Machines

Displayed in the following diagram is how the IIS consoles will be set up for load balancing on two Ektron CMS200/300 Web servers.
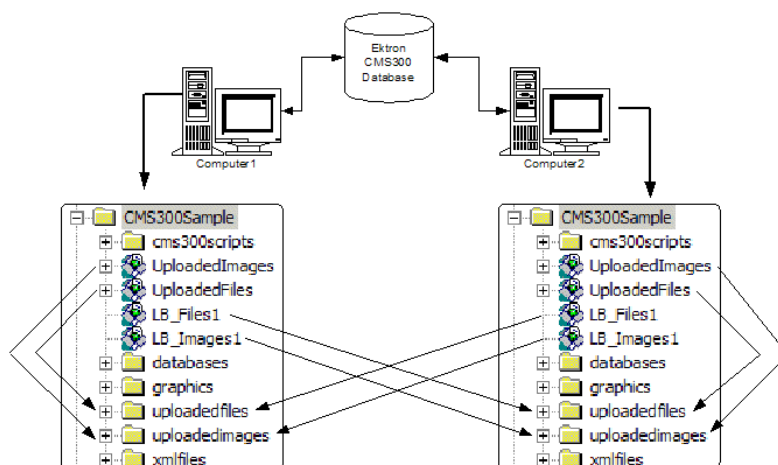
As you can see in the previous diagram, there are two Ektron CMS200/300 Web servers. They each are setup to point to the same database. Also, there are four virtual directories setup in each of the Web server's IIS consoles.

In this section, we will be looking at a Web site that is driven by Ektron CMS200/300 and two Web server machines.

Setting Up Multiple Ektron CMS200/300 Web Sites

For an identical Ektron CMS200/300 Web site to be running on two machines, the same database must be used for each site. To do this:

1. Install the .exe file for Ektron CMS200/300 on each of the Web server machines that will be part of the Web site.

NOTE   Refer to the Ektron CMS200/300 *Setup Manual, Version 4.5, Revision 4* for additional information on performing an install.

2. Single out one of the databases that is installed, and use that as your master Ektron CMS200/300 database. Each Web site will point to this database for content, users, and load balance paths.

3. Create an ODBC or OLE DB connection to that database, and edit the /CMS200/300Scripts/Setup.asp file, for each Web site, to use that DSN, Provider string, or file string.

If performed correctly, each Ektron CMS200/300 Web site on each Web server will use the same database.

Setting Up Virtual Directories

Through Internet Information Services (IIS) on both Web servers, you need to create virtual directories for each of the image or file folders that will be used with your load balancing model. In addition to this, it is recommended that you change the default "UploadedImages" and "UploadedFiles' directories to virtual directories as well.
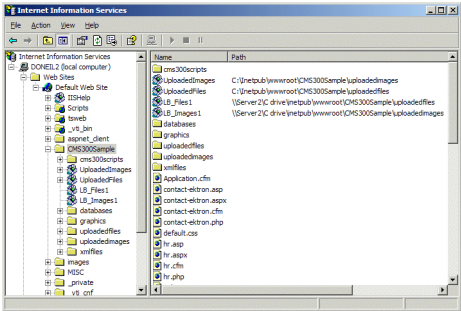
For our example, we will be creating the following virtual directories on both Ektron CMS200/300 Web server machines

Virtual Directory	Description
UploadedImages	Virtual directory that will point to the default UploadedImages folder that is installed by Ektron CMS200/300 on the Web Server.
UploadedFiles	Virtual directory that will point to the default UploadedFiles folder that is installed by Ektron CMS200/300 on the Web server.
LB_Images1	Virtual directory that will point to the UploadedImages folder that is installed on the second Ektron CMS200/300 Web server machine.
LB_Files1	Virtual directory that will point to the UploadedFiles folder that is installed on the second Ektron CMS200/300 Web server machine.

Keep in mind, that these four, identical virtual directories will need to exist in the IIS console for each of the Web server machines that are used in your load balancing model.

Displayed below is how the two machines should be configured.

IIS on Computer1	IIS on Computer2

Why do the virtual directory names have to be identical?

The virtual directory names must be identical because when the load balance paths are created in Ektron CMS200/300, they will be stored in one database. The names of the load balance paths in Ektron CMS200/300 are unique, but depending on the Web server machine that a user is on, IIS will resolve the path to point to the virtual directory that is stored on that Web server machine.

Example:

A load balance path that is created in Ektron CMS200/300 is called "LB_Images1." Ektron CMS200/300 talks to IIS and resolves the path for the virtual directory "LB_Images1" which happens to be \\{Computer1}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages. However, if the Web site is being accessed from the other Web server machine, the load balance path "LB_Images1" is pointing to the physical directory \\{Computer2}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages.

In order for the load balancing model to work correctly, the virtual directories that are located on each Web server must be identical!

Creating a Virtual Directory

Explained in this section are the steps needed to create a virtual directory in IIS. To create a virtual directory:

1. Begin by accessing your IIS management console.
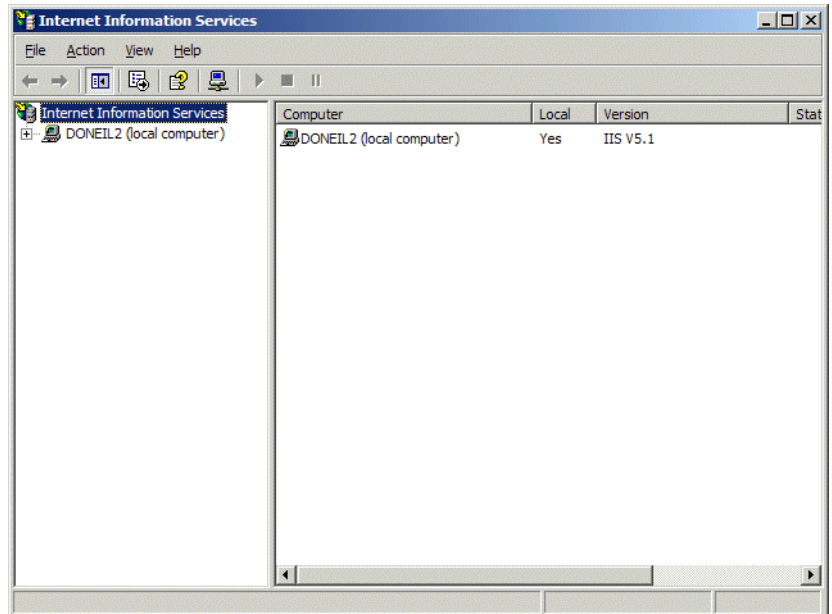
2. In the folder tree on the left side of the console, navigate to the Ektron CMS200/300 Site root folder, in this case it is "CMS200/300Sample"
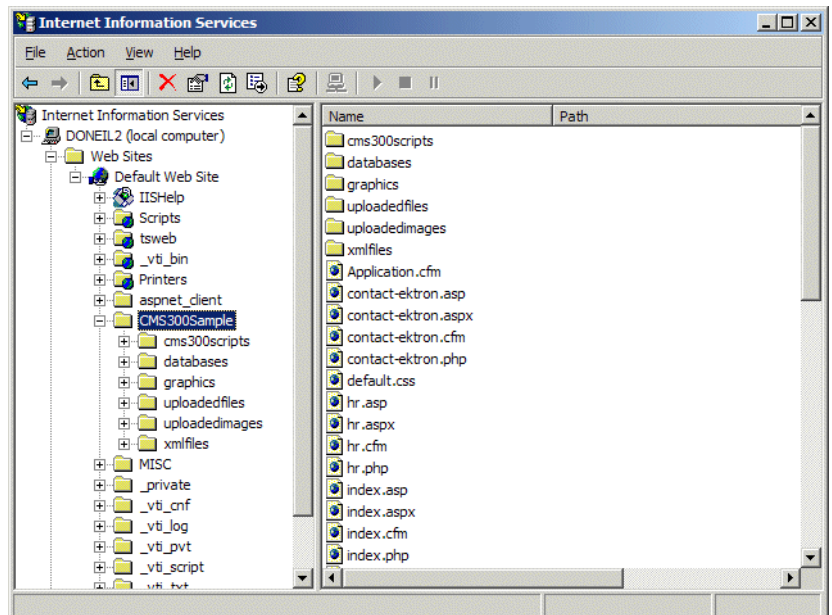
3. In the toolbar at the top of the page, follow the path
Action > New > Virtual Directory...
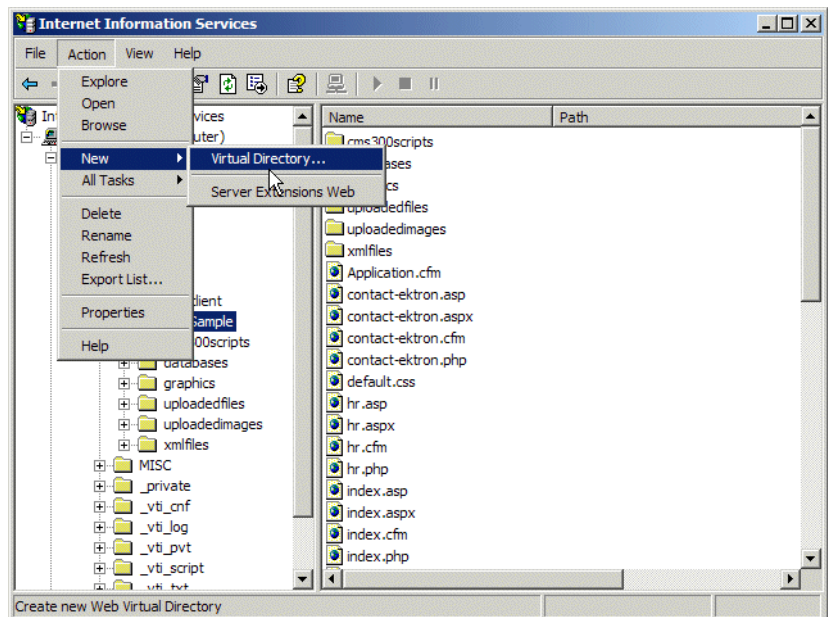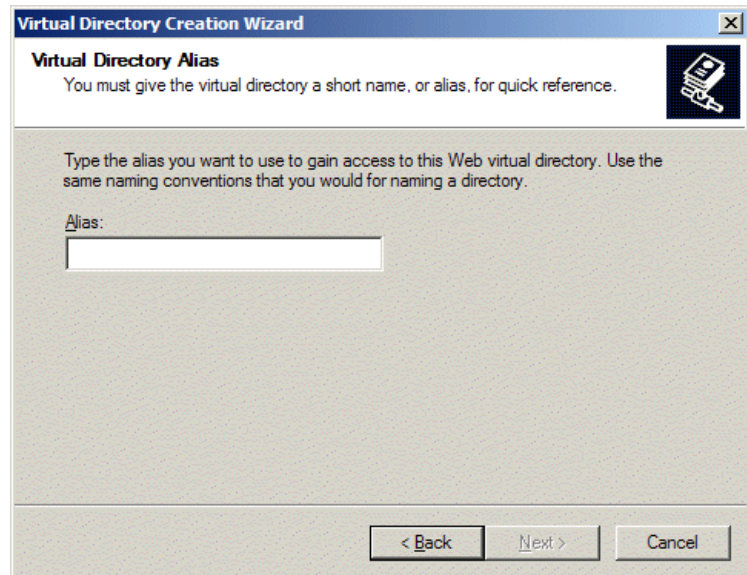
The Virtual Directory Creation Wizard is displayed.
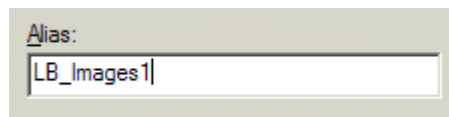
4. Click the **Next** button to proceed.

The Virtual Directory Alias page is displayed.

5. Enter an alias for the virtual directory. This will be the name that is used to reference the virtual directory in Ektron CMS200/300.

6. Click the **Next** button to continue.

   The Web Site Content Directory screen is displayed.
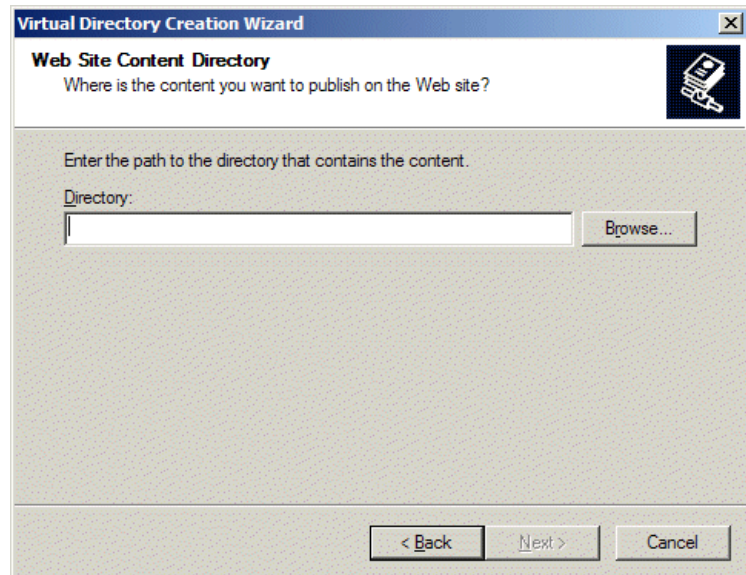
7. Enter the path to the directory that will be used for the virtual directory, or click the browse button to locate it.
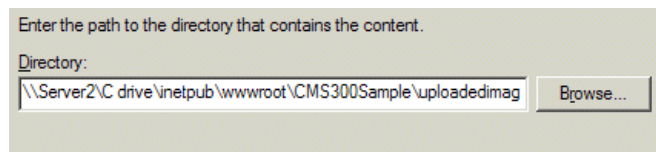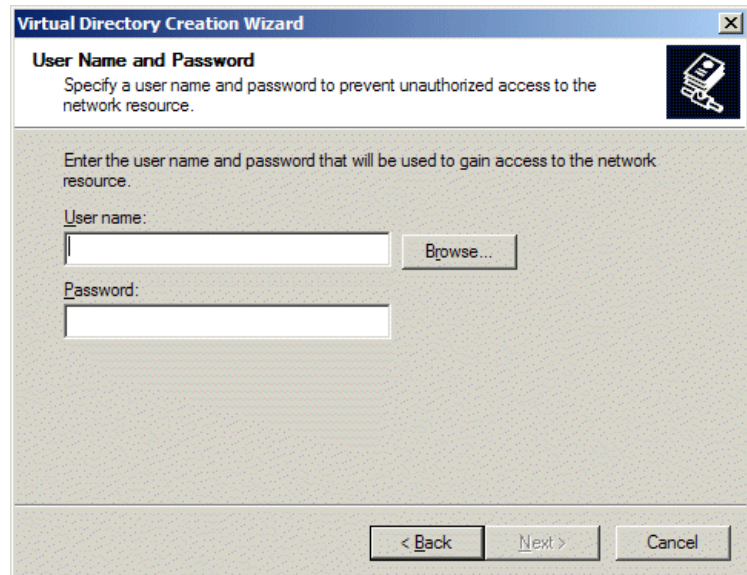
NOTE   The path is constructed using \\{ComputerName}\{FilePath} format

8. Click the **Next** button to continue.

   The Username and Password screen is displayed.
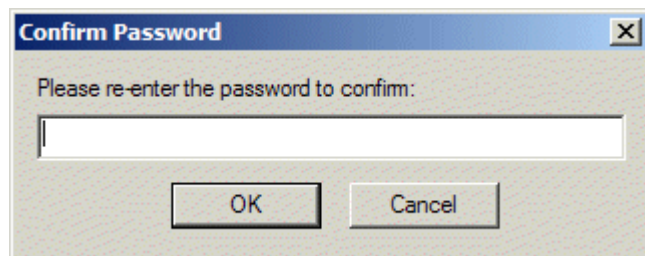
9. Enter a username and password combination for a user that has permissions to access the directory specified in step 7.

10. Click the **Next** button to continue.

    A password confirmation box is displayed.

11. Confirm the password that you specified in step nine by re-typing it in the given field.
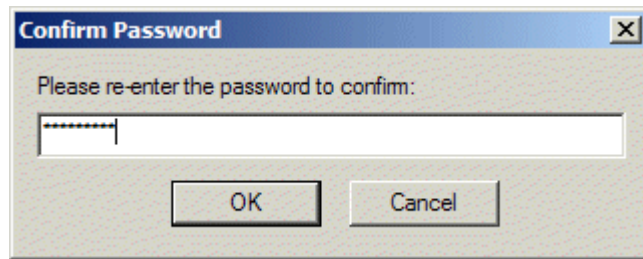
12. Click the OK button to continue.

    The Access Permissions screen is displayed.
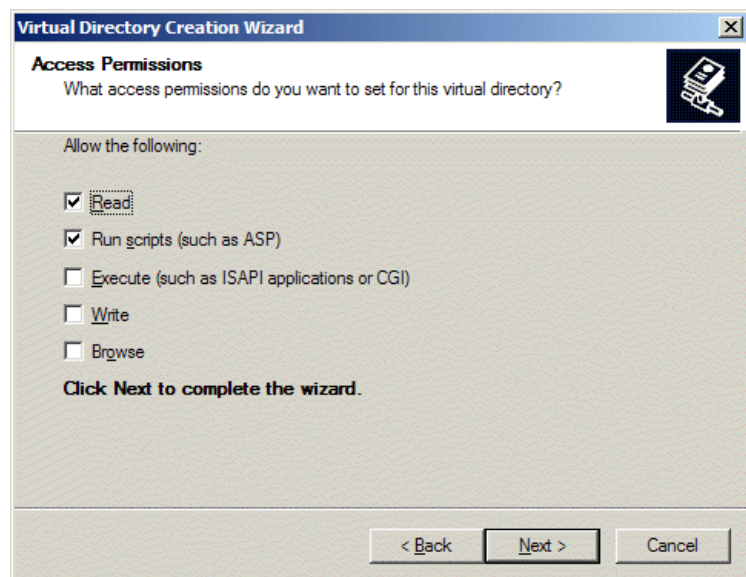
13. Check off the permissions that you would like to allow for the virtual folder.
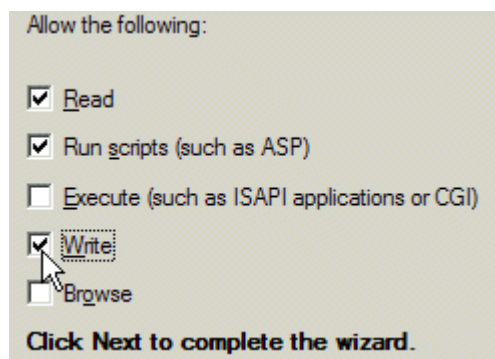
14. Click on the Next button to complete the wizard.

A confirmation page should be displayed notifying you that you have successfully created a virtual directory.
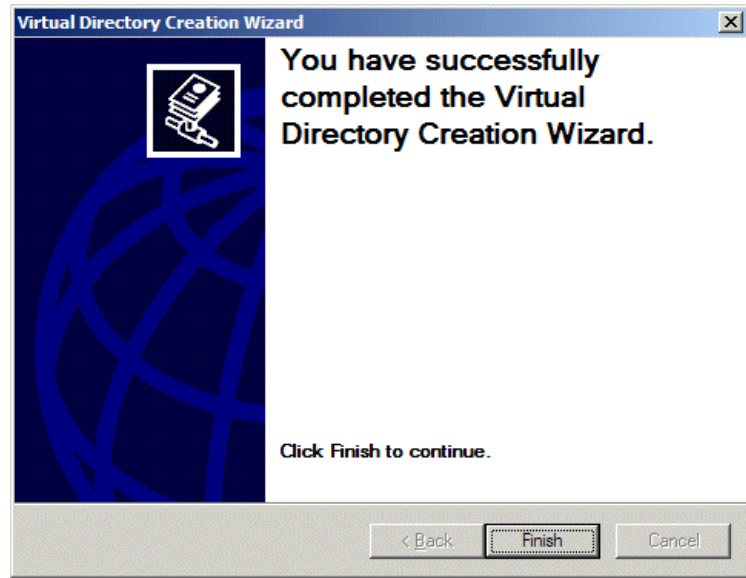
15. Click the finish button to close the window.

16. The IIS console is displayed with the virtual directory added to the specified location.
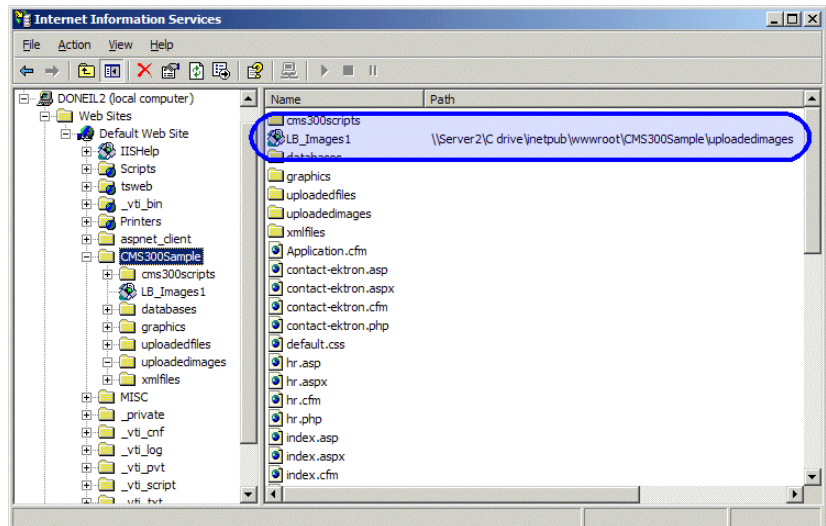
17. Repeat steps 1-16 for each virtual directory that you need to create on each of the Web servers that are running Ektron CMS200/300.

NOTE Remember, the names of the virtual directories on each server that is used must be identical!

Setting Up Ektron CMS200/300 Load Balancing

With the completion of setting up the virtual directories on both Web server machines, you are ready to create the load balance paths in Ektron CMS200/300.

Review

Before we begin, let's review the virtual directories that have been created:

Computer1	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles

Computer1	
Virtual Directory	**Points to...**
LB_Images1	\\{Computer2}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
LB_Files2	\\{Computer2}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles

Computer2	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
LB_Files2	\\{Computer1}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles

Setting Up Load Balance Paths in Ektron CMS200/300

In this section, we will be setting up the load balance paths in Ektron CMS200/300 that will point to the "LB_Images1" and "LB_Files1" virtual directories that we created earlier.

NOTE For additional information about working with load balance paths in Ektron CMS200/300, refer to "Load Balancing" on page 153.

To add a load balance path in Ektron CMS200/300:

1. Begin by logging into one of the Ektron CMS200/300 Web sites that you have set up in "Setting Up Multiple Ektron CMS200/300 Web Sites" on page 455, as an administrator.

NOTE Refer to "Logging Into Your Ektron CMS200/300 Web Site" on page 11 for additional information.

2. Access the load balance settings page in the library folder as described in "Accessing Library Load Balancing Page" on page 154.
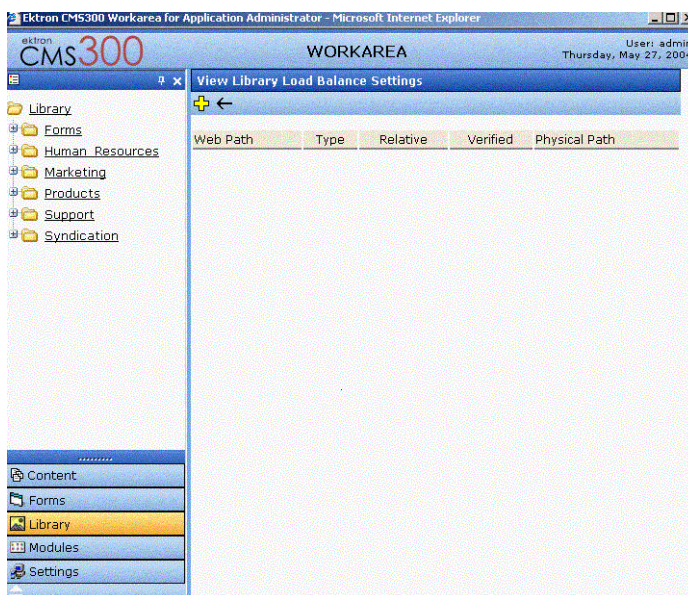
3. Click on the add button in the toolbar at the top of the page.

The Add a Library Load Balancing Path page is displayed.

4. Use the following table to assist you with filling out the form.

Field	Description
Images/Files	Specify if the load balance path folder will be for images or files.
Load Balance Path	Enter the path of the folder.
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS200/300 site root, check off the box to make the path relative to that. Otherwise, remove the check if the path is not relative to the site path.

Displayed here is an example of filling out the form using the virtual directory "LB_Images1."

5. Click on the **Save** button from the toolbar to save and add the new load balance folder to the Ektron CMS200/300 library.

The page is refreshed, and the View Library Load Balance Settings page is displayed with the changes reflected.
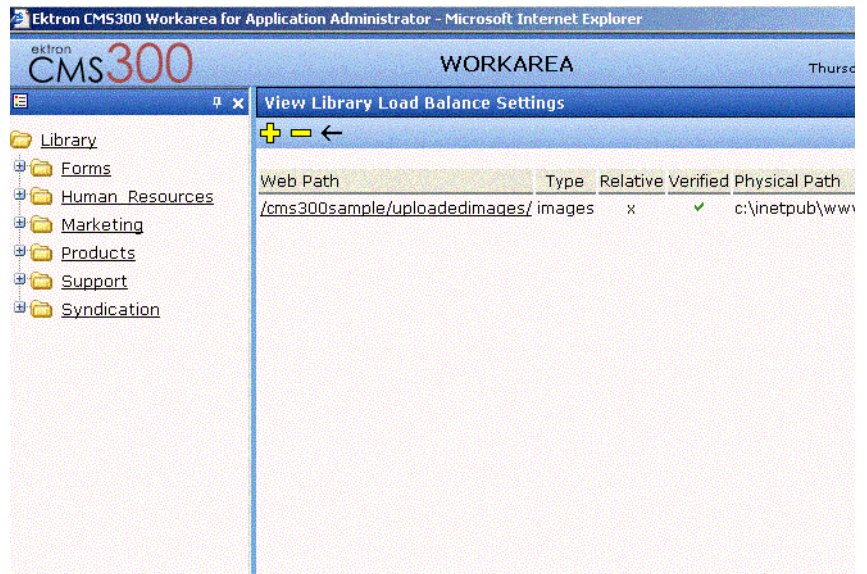
Notice that there is a green check. The green check notifies you that IIS on the current Web server machine you are on has successfully resolved the virtual directory and located the physical folder it points to.

6. To further verify the load balance path is working successfully, let's look at the view library load balance setting page in the workarea for the other Ektron CMS200/300 Web server machine.
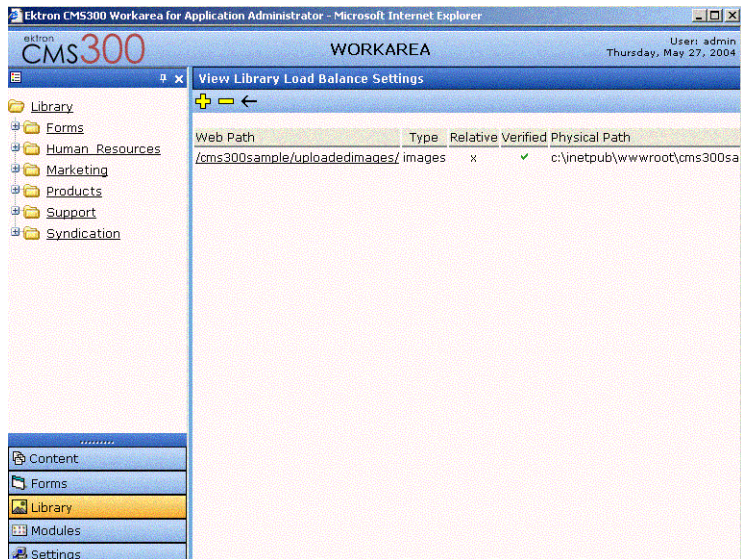
Notice that the two Web path names are identical, but the physical paths displayed are different because IIS resolved each one differently on each machine.

What Now?

Once you have successfully configured your load balancing model for your Ektron CMS200/300 Web site, you are ready to put it to use. Now, each time an image or file gets uploaded in your Web site, regardless of the Web server the user is currently working on, the assets will be replicated in all the folders specified in Ektron CMS200/300.

Ektron CMS200/300 On Three Machines

In this section, we will be looking at a Web site that is driven by Ektron CMS200/300 and three Web server machines.

Setting Up Multiple Ektron CMS200/300 Web Sites

For an identical Ektron CMS200/300 Web site to be running on three machines, the same database must be used for each site. To do this:

1. Install the .exe file for Ektron CMS200/300 on each of the Web server machines that will be part of the Web site.

2. Single out one of the databases that is installed, and use that as your master Ektron CMS200/300 database. Each Web site will point to this database for content, users, and load balance paths.

3. Create an ODBC or OLE DB connection to that database, and edit the /CMS200/300Scripts/Setup.asp file, for each Web site, to use that DSN, Provider string, or file string.

If performed correctly, each Ektron CMS200/300 Web site on each Web server will use the same database.

Setting Up Virtual Directories

Through Internet Information Services (IIS) on all three Web servers, you need to create virtual directories for each of the image or file folders that will be used with your load balancing model. On top of this, it is recommended that you change the default "UploadedImages" and "UploadedFiles' directories to virtual directories as well.
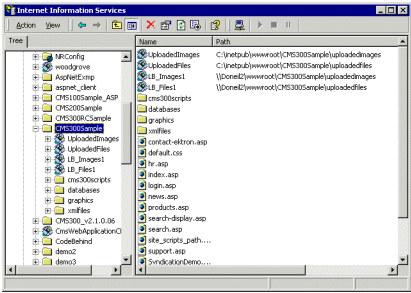
For our example, we will be creating the following virtual directories on all Ektron CMS200/300 Web server machines

Virtual Directory	Description
UploadedImages	Virtual directory that will point to the default UploadedImages folder that is installed by Ektron CMS200/300 on the Web Server.
UploadedFiles	Virtual directory that will point to the default UploadedFiles folder that is installed by Ektron CMS200/300 on the Web server.

Virtual Directory	Description
LB_Images1	Virtual directory that will point to the UploadedImages folder that is installed on the second Ektron CMS200/300 Web server machine.
LB_Files1	Virtual directory that will point to the UploadedFiles folder that is installed on the second Ektron CMS200/300 Web server machine.
LB_Images2	Virtual directory that will point to the UploadedImages folder that is installed on the third Ektron CMS200/300 Web server machine.
LB_Files2	Virtual directory that will point to the UploadedFiles folder that is installed on the third Ektron CMS200/300 Web server machine.

Keep in mind, that these four, identical virtual directories will need to exist in the IIS console for each of the Web server machines that are used in your load balancing model.

Creating a Virtual Directory

Refer to "Creating a Virtual Directory" on page 458 for information about creating virtual directories in IIS.

Setting Up Ektron CMS200/300 Load Balancing

With the completion of setting up the virtual directories on both Web server machines, you are ready to create the load balance paths in Ektron CMS200/300.

Review

Before we begin, let's review the virtual directories that have been created:

Computer1	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles

Computer1	
Virtual Directory	**Points to...**
LB_Images1	\\{Computer2}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
LB_Files1	\\{Computer2}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles
LB_Images2	\\{Computer3}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
LB_Files2	\\{Computer3}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles

Computer2	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
LB_Files1	\\{Computer1}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles
LB_Images2	\\{Computer3}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
LB_Files2	\\{Computer3}\C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles

Computer3	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS200/300Sample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS200/300Sample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS200/ 300Sample\UploadedImages
LB_Files1	\\{Computer1}\C:\InetPub\wwwroot\CMS200/ 300Sample\UploadedFiles
LB_Images2	\\{Computer2}\C:\InetPub\wwwroot\CMS200/ 300Sample\UploadedImages
LB_Files2	\\{Computer2}\C:\InetPub\wwwroot\CMS200/ 300Sample\UploadedFiles

Setting Up Load Balance Paths in Ektron CMS200/300

Refer to for information about how to configure Ektron CMS200/300 for load balancing.

What Now?

Once you have successfully configured your load balancing model for your Ektron CMS200/300 Web site, you are ready to put it to use. Now, each time an image or file gets uploaded in your Web site, regardless of the Web server the user is currently working on, the assets will be replicated in all the folders specified in Ektron CMS200/300.

Redlining

Ektron CMS200/300 has implemented a comparison utility that allows you to compare the currently published version of a content block with a staged or historical version. Using this utility allows you to quickly find the changes that have been made to a content block.

The following section explains how to use and configure the Ektron CMS200/300 Comparison Utility.

What is "Redlining?"

Redlining is synonymous with comparing two versions of a content block. The term redlining is used because the difference between the two versions are marked with a red line struck through the content.

Displayed here is an example of a published content block in Ektron CMS200/300 being compared with a staged version.
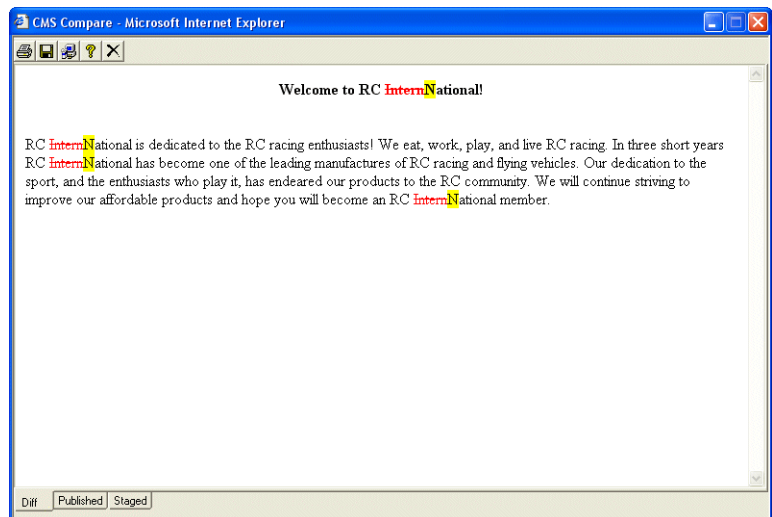
As you can see, the changes to the content have been identified by redlining the deleted content and highlighting the added content. Content that hasn't been changed isn't emphasized.

When Can I Compare Content?

The Ektron CMS200/300 comparison utility, eWebDiff, is only available when viewing historical versions or when the content has staged version.

The following table explains when the comparison utility can be used, and which versions are compared.

Status	Current published version compared with...
Published	Historical version stored in the content history area.
Checked-In Content	Most recently saved and checked-in version
Submitted Content	Submitted version.
Pending Start Date	Scheduled version pending start date.
Checked Out	N/A

Content that is in a state where it can be compared with another version is denoted by the **View Difference** button ( ) in the content history area or the icon ( ) on the Web page view.

The "Compare Content" Window

Before using the content compare feature, you should have some knowledge of the compare content window and buttons.

NOTE The first time the Ektron CMS200/300 Compare utility is opened, a simple installation program will be run. See "Using the eWebDiff for the First Time" on page 483 for additional information.

As you can see, the "Compare Content" window is comprised of the following:

- Toolbar.
- Content window.
- View content tabs.
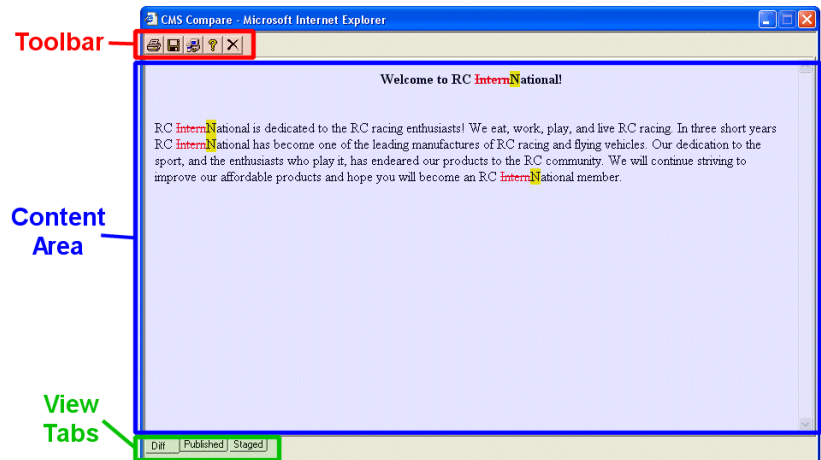
Each of these fields are explained in the following sections.

Toolbar

The content comparison toolbar contains five different buttons. The following table explains the functionality of each button.

Button	Name	Description	More Information
🖨	Print	Sends content to local or network printer.	"Print" on page 479
💾	Save	Saves a copy in HTML format on your local machine or network.	"Save" on page 479
📲	Setup	Opens setup dialog box to configure the eWebDiff settings.	"Setup" on page 480

Button	Name	Description	More Information
?	Help	Views information about the eWebDiff utility	"Help" on page 481
✕	Exit	Closes the window.	"Exit" on page 481

Print

Clicking on the **Print** command (🖨) opens the Windows print dialog box.

When opened, a list of available printers to send the content to is displayed.

NOTE   The print option will print the content currently displayed, whether it be the compared content, published content, or staged content.

Save

Clicking on the **Save** command (💾) opens the Windows Save dialog box.

When accessed, you may select a location on your local machine or network to save the content as a physical HTML file.

When saved as a physical file, the HTML may be edited, however, the changes will not be saved to the Ektron CMS200/300 Web Server.

NOTE   The save option will save the version of the content that you are currently viewing.

Setup

Clicking on the **Setup** command (🔡) opens the Ektron CMS200/
300 eWebDiff setup dialog box.
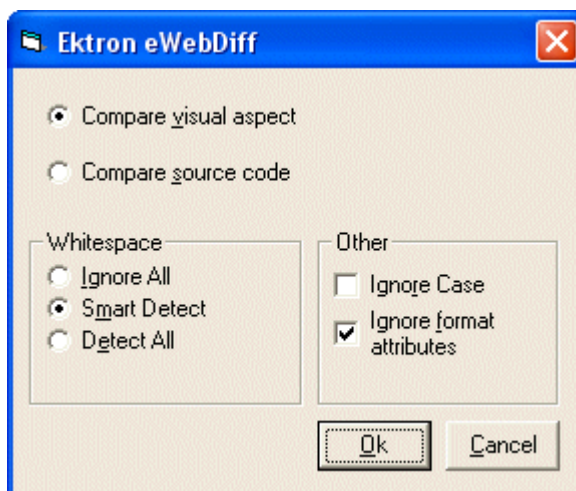
You may configure the setup options to better suit your needs. The
following table explains each of the selectable options.

Option	Description
Compare Options	
Compare Visual Aspect	Compares content as it would appear on a Web page.
Compare Source Code	Displays compared content as source HTML.
Whitespace Options	
Ignore All	All whitespace characters are ignored (not taken into consideration).
Smart Detect	One ore more consecutive whitespace characters are treated as a single separation sequence. i.e, ignore multiple blanks.
Detect All	Blank (whitespace) characters are treated as any other character.

Option	Description
Other Options	
Ignore Case	Determines whether case sensitive or insensitive comparison is made.
Ignore Format Attributes	Specifies wether the control should ignore changes in text-formatting attributes (HTML Visual Analysis only).

When you have completed updating your setup information, click **OK** to save any changes and return to eWebDiff.

Help

Clicking on the **Help** command (💡) opens the Ektron CMS200/300 eWebDiff Help dialog box.

The help dialog box contains useful information about using eWebDiff.

Exit

Clicking on the **Exit** command (✖) closes the Ektron CMS200/300 eWebDiff window.

Content Area

SImply put, the content area is the section of eWebDiff that displays the content comparison.
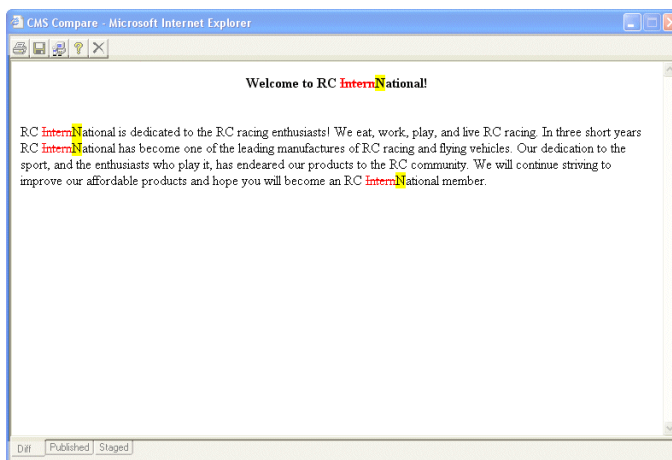
When viewing content that is being compared, the following table is a legend for what each symbol represents.

Symbol	Example	Description
Plain Black Text	Trinitys new pipe and	Unchanged content.
Yellow Highlighted Text	Our dedication to the	Added Content.
Red, Struck-through text	dedicated to the RC	Deleted content.

Using the tabs on the bottom of the eWebDiff window, you can view different versions of the content. See "View Tabs" on page 483 form more information.

View Tabs

When viewing content within eWebDiff, there are three different view modes:

View	Description
Diff	Compares the published version of the content block to the staged version.
Published	Displays only the current published version.
Staged	Displays the staged, or historical version, of the selected content block.

Switching between views can easily be done by clicking on the respective tab.

Using the eWebDiff for the First Time

The first time the eWebDiff utility is used on a client machine, a simple installation program is performed.

Click **YES** when the following screen is displayed.
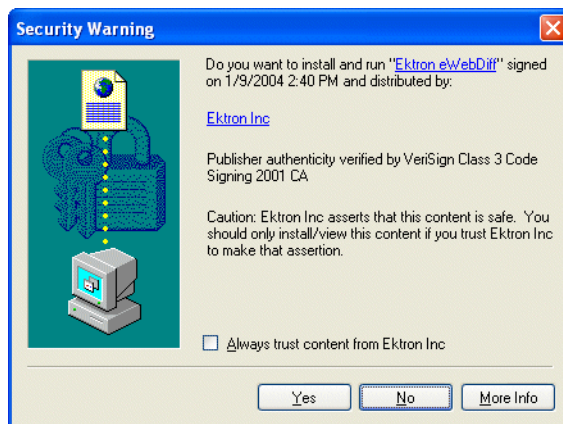
The installation program will complete, then you must close and reopen eWebDiff.

Adding Content Programmatically

NOTE   This feature is only available with Ektron CMS300. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

Creating content can be performed using a special function for Ektron CMS200/300. When utilized, your Web site developer can create a Web form on your Web site which allows users to add new content to Ektron CMS200/300 without the need of logging in.

Displayed here is an sample add content form.

Your Web site developer can further customize this form to better suit your needs. See the Ektron CMS200/300 *Developer Manual* for additional information.

Scheduling Content

Scheduling content allows you to create a content block, and specify a date and time in the future when you would like the content to be visible on the Web site. Similarly, you may set a content block to be removed from the Web site at a specific date and time. Each of these options are made possible by scheduling content in Ektron CMS200/300.

How Does It Work?

When you create a content block, or modify an existing one, you will have to option to set the content to go live at a specific time and date. How does this work? When you select a go live date and time for a piece of content, you are telling the Ektron CMS200/300 application that you want the content block to be seen by the public at that certain date and time. Below is an example.

Your company is having a sale of the century in a month, everything has been completed for the sale except for the announcement and the promotion for it. You decide to update the company Web site to let the public know about it. With this go live feature, you will be able to create the web content and set it to be seen by the public a week before the big sale.

Setting a Start Date

To set a start date:

1. First, access the editor by adding a new content block, or editing an existing one.
2. If adding a new content block, enter a title, comment, and the body content.

3. Click on the calendar button next to the start date text field.

The "Ektron CMS200/300 Calendar" opens in a new window.

4. Select the date and time you would like the content to be visible on the Web site.

5. When you have selected the date and time for the content to start, click on the Submit button in the Calendar Window. You will notice that the data and time will be entered into the start date text field

You may also enter the date and time into the text field without using the calendar function. If you do this, be sure to use the following format

DD-MMM-YYYY hh:mm:ss AM/PM

NOTE   When you select a time for the content to go live, that time will depend on the system clock for the server machine. If the system clock for the server is incorrect, then the content will not Go Live at the intended time.

What Happens After I Set a Start Date?

There are two scenarios that need to be addressed when wondering what will happen after you set the go live date and the content goes through the entire approval chain.

1. Go Live Date on New Content
2. Go Live Date on Existing Content

Setting the Go Live Date on New Content

When you set the go live date on a new content block, the content will not be viewable at all until the date specified. If you attempt to navigate to the page where the content is located, you will only see the template. This occurs in both the standard view and the Ektron CMS200/300 view.

Setting the Go Live Date on Existing Content

When you set a go live date on an existing content block, and the content has gone through the appropriate approval chain, the content will appear with a grey border around it until the date specified. You will also notice that the content that is seen in the content block is the most recent published version. When the go live date occurs, the new content will replace the current content, and the content block will go into an Active state.

Setting an End Date

To set an end date:

1. First, access the editor by adding a new content block, or editing an existing one.
2. If adding a new content block, enter a title, comment, and the body content.

3. Click on the calendar button next to the end date text field.
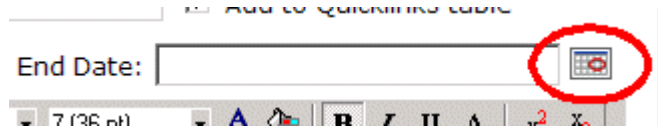
The "Ektron CMS200/300 Calendar" opens in a new window.

4. Select the date and time you would like the content to be removed from the Web site.
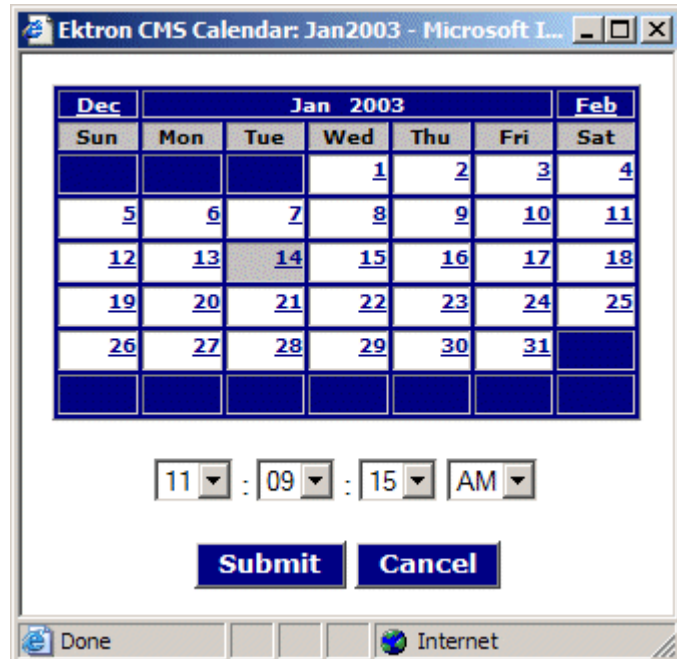
5. When you have selected the date and time for the content to end, click on the Submit button in the Calendar Window. You will notice that the data and time will be entered into the end date text field
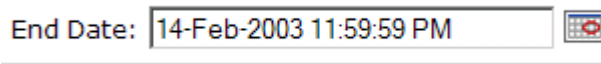
You may also enter the date and time into the text field without using the calendar function. If you do this, be sure to use the following format

DD-MMM-YYYY hh:mm:ss AM/PM

When you select a time for the content to end, that time will depend on the system clock for the server machine. If the system clock for the server is incorrect, then the content will not end at the intended time.

What Happens After I Set an End Date?

After you set an end date to a content block, and it gets published to your Web site, the content will be visible on the Web site. When the end date and time occur, the content will be hidden on the Web site.

If a site visitor is to navigate to the page where the content was located, they will see just the template without the content block. Due to this, Ektron recommends that you have a content block lined up to replace the content block that reached its end date.

Combining a Start and End Date

When used together, a start date and end date can relieve you from much unneeded work. By specifying a start date and an end date, you can determine the exact length the content block will be viewable on the Web site, without performing the tasks manually.

Summaries

Summaries in Ektron CMS200/300 are used when displaying a list of content blocks in the system on an ASP Web page. When you create a content block, you will have the option of creating a short summary that describes the content block. There are many uses for this, a good example might be a news Web site. You will have the option of listing all the top stories and a quick summary about them.

TOP STORIES

[Ektron Named a Rising Star (08-15-2001)](#)

August 15, 2001, Amherst, New Hampshire, USA — Ektron, Inc., an innovator in Web content management and authoring, has been named a Rising Star as part of the prestigious New England Technology Fast 50 Program.

[Ektron Launches International Distribution Program *(08-08-2001)*](#)

August 8, 2001, Amherst, New Hampshire, USA — Ektron, Inc., an innovator in dynamic Web content authoring and management with over 350,000 users, today announced the launch of its international distribution program.

The examples above have many beneficial features. For example, the titles of the summaries are the titles of the content blocks, and they are automatically linked to the page with the full article. Below the title is a brief summary that gets the readers attention.

The summaries can have all the same characteristics of the actual content block. Images and files may be included, as well as different font styles and sizes. This chapter will discuss the concept of summaries and how they can help navigation in your site.

Creating Summaries

To begin the whole process of summaries, you must first create your summaries for the content blocks you wish to display. This can be done either by accessing an existing content block in the

work area, or right through the editor. We will explore both
scenarios in the following section.

Creating Summaries Via the Editor

To begin creating a summary of the editor, you must first begin by
accessing the editor by either checking out an existing content
block, or creating a new one.

Creating a Summary on a New Content Block

To create a summary for a new content block, perform the
following steps:

1. Access the editor by navigating through the content folders in
   your Workarea until you find a folder where you would like to
   create the content.

2. Click on the **Add Content** button( ) from the toolbar.

   The "Add Content" window is displayed.

3. Insert a title, comment, and body text to form the content block.

4. Click on the **Edit Summary** button( ) from the Add Content
   window.

   The "Edit Summary" window opens.

5. Enter a summary for the content block that you are creating.

NOTE   The summary may be as long as you are allowed, and you can also include your
favorite features in it like images, files, and hyperlinks as well.

6. Click on the **Save** button( ).

   The summary is saved and you are taken back to the "Add
   Content" window where you can finish adding your content.

Creating a Summary for an Existing Content Block

In this example, we will create a summary for the home page
content block.

To create a summary for an existing content block, perform the
following steps:

1. Begin by accessing the view content page for the content that you want to edit the summary for as described in "Viewing Content" on page 64.

2. Click on the **Edit Summary** button(📝) from the toolbar.

   The "Edit Summary" window opens.

3. Enter a summary for the content block that you are creating.

NOTE   The summary may be as long as you are allowed, and you can also include your favorite features in it like images, files, and hyperlinks as well.

---

4. Click on the **Save** button(💾).

   The summary is displayed, the edit summary window closes, and the "View Content" page is displayed.

NOTE   Keep in mind when you edit the summary for an existing content block, the content block goes into a checked out state. When you have finished creating the summary, click the Check-In button to check back in the content block. From that point, you will then need to submit it or publish it.

Metadata

Metadata in Ektron CMS200/300 are used in the HTML code of each Web page. When you create a content block, you will have the option of also defining metadata for it as well. The types of metadata that can be added to each content block are defined by the administrator, and edited by the authors of the content block. Shown below is an example of metadata in a Ektron CMS200/300 Web page.
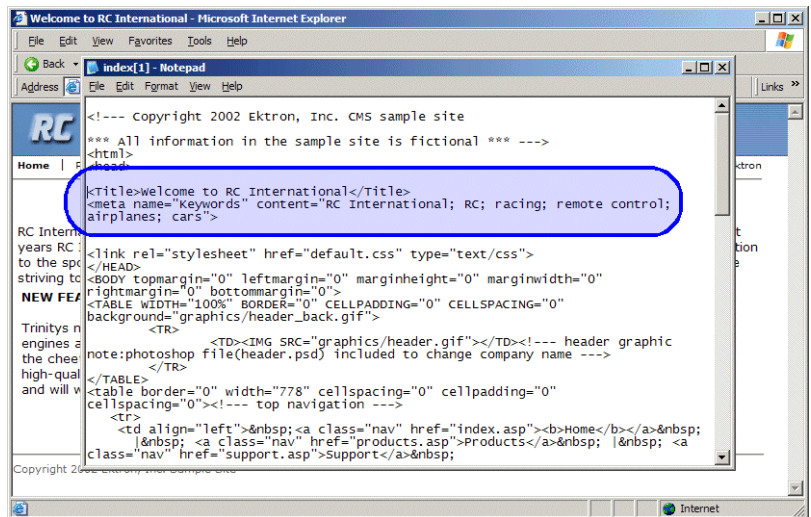
As you can see, there is a title and keywords defined for the content block. Each of these were defined while creating the content block

This chapter will explain the features of the metadata feature of Ektron CMS200/300.

Managing Metadata Definitions

Each content block that is created with Ektron CMS200/300 can have it's own unique metadata that can easily be added to the content block by the author.

Defining Metadata

The metadata types such as keywords and title can be defined by an Ektron CMS200/300 administrator. As a result, the number of metadata types will be based on the number the administrator defines in the workarea. When defining the metadata that will be used, you will not be limited, but each type that is created will need to be unique.

As stated earlier, metadata tags are defined by the administrator in his/her workarea.

To define metadata, perform the following steps:

1. Begin by accessing the Administrator Workarea.
2. From the left frame of the workarea window, click on the **Settings** folder button.

   Settings Folder hierarchy is displayed.
3. Click on the "Configuration" folder to expand the tree.
4. Click on **Metadata Definitions** folder from the folders displayed.

   The "View Site Metadata Definitions" page is displayed.

From this page, you will be able to add, edit, and delete metadata types that will be used for each of the content blocks in Ektron CMS200/300.

Adding a Metadata Definition

To add a metadata definition, perform the following steps:

1. Access the "View Site Metadata Definitions" page as described in "Defining Metadata" on page 495.

1. Click on the **Add Metadata** button( ) from the toolbar.

   The "Add Metadata Definition" page is displayed.
2. Add the necessary information to create the metadata definition. Use the following table to assist you

Field	Description
Name	Enter a name that will be used to reference this metadata type in Ektron CMS200/300.

Field	Description
Style	Choose from the list if you want the style of this metadata to be "name" or "http-equiv"
Type	From the list, choose whether this tag will be an HTML tag, <title></title>, or a Meta tag <meta> when inserted on the Web page.
Separator	Enter a character that will be used to separate the values in the field (for example, ";"). Default is set to ";"
Editable	Check off this box if you wish to allow the users to edit the contents of the metadata. By not checking this off, you can obtain uniform metadata for each content block that uses this specific tag.
Required	Check this box off to make this specific tag required to be in all the content blocks.
Remove Duplicates	Checking off this box will remove any duplicate words/phrases in the metadata
Case Sensitive	Check off this box if you want the remove duplicates to be case sensitive.
Enabled Selectable Metadata	Checking off this option forces users to select metadata options specified in the selectable text and default text fields instead of editing their own metadata.
Allow Multiple Selections	Check off this option to allow users to select multiple options for the metadata instead of just one.
Allow Selectable Text	Enter the metadata to be selectable by the users. Separate each option by the separator specified for the metadata definition.
Default Text	You may enter default values for the metadata tag in this field. If selectable only is checked off, then the default text appears in selectable list on the edit metadata for content page.

3. Click on the **Save** button( ) from the toolbar to save the changes.

The page refreshes and a list of all the current metadata definitions is displayed.

Viewing Metadata Definitions

You may view any metadata definition that is currently being used in your Ektron CMS200/300 Web site.

To view a metadata definition, perform the following steps:

1. Begin by navigating to the "Metadata Definitions" page in the administrator workarea as described in "Defining Metadata" on page 495.

2. Click on the name of the metadata definition that you wish to view.

    The "View Metadata Definition" page is displayed.

From this screen, you will be able to Edit and Delete this metadata definition.

Editing a Metadata Definition

You may also edit a metadata definition that is currently being used in your Ektron CMS200/300 Web site. Editing a metadata type can be done in the Administrator workarea as well.

To edit a metadata definition, perform the following steps:

1. Begin by accessing the view metadata definition page for the metadata definition you would like to edit as described in "Viewing Metadata Definitions" on page 497.

2. Click on the **Edit** button( ) from the toolbar.

    The "Edit Metadata Definition" page is displayed.

3. Make the necessary changes to the metadata definition. Use the following table to assist you:

Field	Description
Name	Enter a name that will be used to reference this metadata type in Ektron CMS200/300.
Style	Choose from the list if you want the style of this metadata to be "name" or "http-equiv"
Type	From the list, choose whether this tag will be an HTML tag, <title></title>, or a Meta tag <meta> when inserted on the Web page.

Field	Description
Separator	Enter a character that will be used to separate the values in the field. For example, ";"
Editable	Check off this box if you wish to allow the users to edit the contents of the metadata. By not checking this off, you can obtain uniform metadata for each content block that uses this specific tag.
Required	Check this box off to make this specific tag required to be in all the content blocks.
Remove Duplicates	Checking off this box will remove any duplicate words/phrases in the metadata
Case Sensitive	Check off this box if you want the remove duplicates to be case sensitive.
Enabled Selectable Metadata	Checking off this option forces users to select metadata options specified in the selectable text and default text fields instead of editing their own metadata.
Allow Multiple Selections	Check off this option to allow users to select multiple options for the metadata instead of just one.
Selectable Text	Enter the metadata to be selectable by the users. Separate each option by the separator specified for the metadata definition.
Default Text	You may enter default values for the metadata tag in this field. If selectable only is checked off, then the default text appears in selectable list on the edit metadata for content page.

4. Click on the **Update** button(![save icon]) from the toolbar to update and save the changes.

The page refreshes and the "View Metadata Definitions" page is displayed with the changes reflected in the table.

What happens when a metadata definition is edited?

Once you edit a metadata definition, Ektron CMS200/300 looks through all your current content blocks and makes the necessary changes to update all the relevant metadata definitions.

If the change that you made to the metadata definition was changing the type from HTML tag to Meta tag, then the content

blocks that use that metadata definition will change to be something like this:

<Title>CMS200/300 Sample Web Site</Title>

to

<meta name="Title" content="CMS200/300 Sample Web Site">

Deleting a Metadata Definitions

Metadata definitions that are no longer used, or no longer needed can be easily removed from the Ektron CMS200/300 Web site. Like editing a metadata definition, deleting one will delete the metadata tag from every content block that uses it on the Web site.

To delete a metadata definition, perform the following steps:

1. Begin by accessing the view metadata definition page for the metadata definition you would like to delete as described in "Viewing Metadata Definitions" on page 497.

2. Click on the **Delete** button( ) from the toolbar.

   A confirmation message is displayed.

3. Click **OK**.

   Another confirmation message is displayed.

4. Click **OK**.

   The metadata definition is deleted and the "Metadata Definitions" page is displayed with the changes reflected.

Inserting Metadata Via the Editor

Once metadata has been defined in Ektron CMS200/300, you are ready to create a content block and assign metadata to it.

To begin assigning metadata to a content block, you must first begin by accessing the editor supplied by Ektron CMS200/300 by either checking out an existing content block, or creating a new one via the workarea.

Defining Metadata to a New Content Block

To define metadata for a new content block:

1. Begin by accessing the editor by navigating through the content folders in your Workarea until you find a folder where you would like to create the content.

2. Click on the **Add Content** button( ) from the toolbar.

   The "Add Content" page is displayed.

3. Insert a title, comment, and body text to form the content block.

4. Click on the **Edit Metadata** button( ) from the Add Content toolbar.

   The "Edit Metadata" window is displayed.

5. Make the necessary additions/deletions to the Metadata.

NOTE The application will display an * (asterisk) next to the metadata definition that is set as required by the administrator. This will enable the user to differentiate between the metadata definitions that are required or optional respectively.

Separator Character

In the keywords field, notice that there is a semi-colon ";" as a separator character. This character is defined by the administrator when creating the metadata types. When you want to separate items in the fields, you will need to use the separator character that is unique to that field.

Default Metadata

When the administrator creates and defines the metadata definitions, he/she has the ability to create default metadata for each definition. If there is default metadata defined for a specific metadata type, then clicking on the **DEFAULT** button at the bottom of each field will restore the default content.

Required Fields

When you are editing the metadata for the content block, some of the fields may be required. If a metadata field is required, then you will need to have the proper metadata defined there before you can submit or publish the content block. An *(asterisk) is displayed next

to all metadata definitions that are set as a required when that metadata definition was being created.

Metadata Character Counter

When the administrator creates and defines the metadata definitions, he/she has the ability to enter information pertaining to the metadata for each definition. Below each metadata definition field, there is a field called "Characters Left", that counts the number of metadata characters. If you exceed the maximum limit (500 characters) to enter the metadata information, the application will not let you save anything beyond the max limit.

Saving Metadata and Content

When you have finished editing the metadata, you may click the **SAVE** button on the edit metadata window. You will then be taken back to the add content window where you can finish adding your content.

Viewing the Source of the Web page

Once you have finished adding your content, and the content block is published to the Web site, you can view the source of the page to see what the metadata for the content looks like.

Shown below is the source of the Web page we just created:
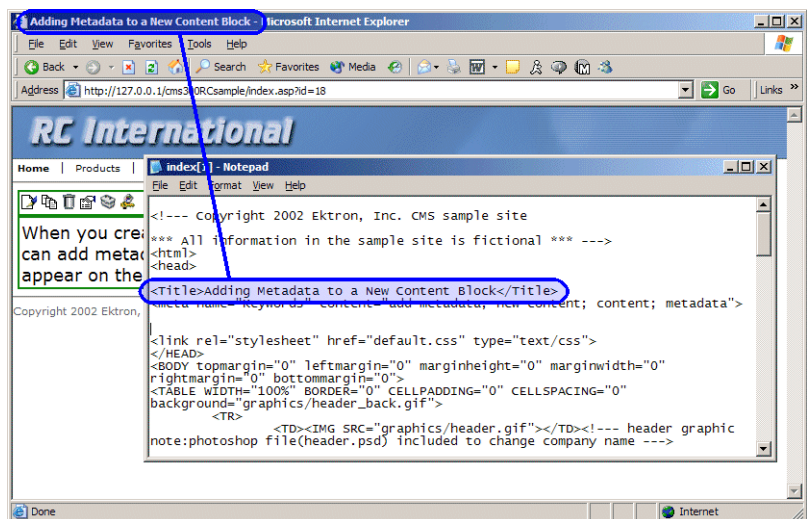
On this Web page, notice that the keywords are included in the meta tag, and the title is in HTML tags. These will appear however the administrator sets up the metadata definitions.

Editing the Metadata for an Existing Content Block

In this example, we will edit the metadata for the home page content block.

1. Begin by accessing the view content page for the content block you would like to edit the metadata for as described in "Viewing Content" on page 64.
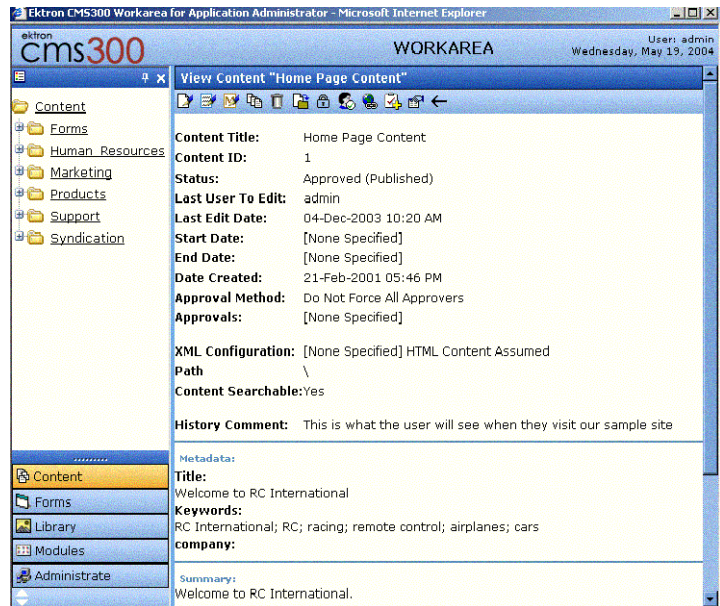
2. Click on the **Edit Metadata** button in the toolbar at the top of the page.

The edit metadata page will open with the current metadata for the content block displayed in the fields.
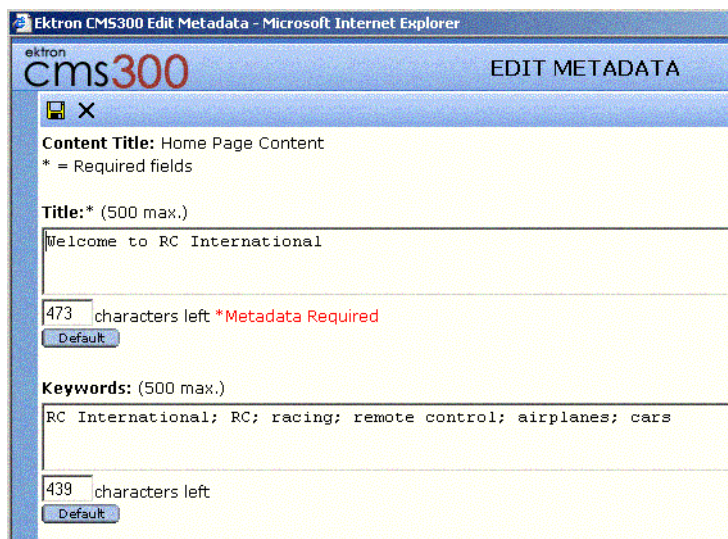
3. Make the necessary changes to the metadata, then click on the **Save** button ( ) from the toolbar to save the changes.

The page is refreshed, and the view content page is displayed.
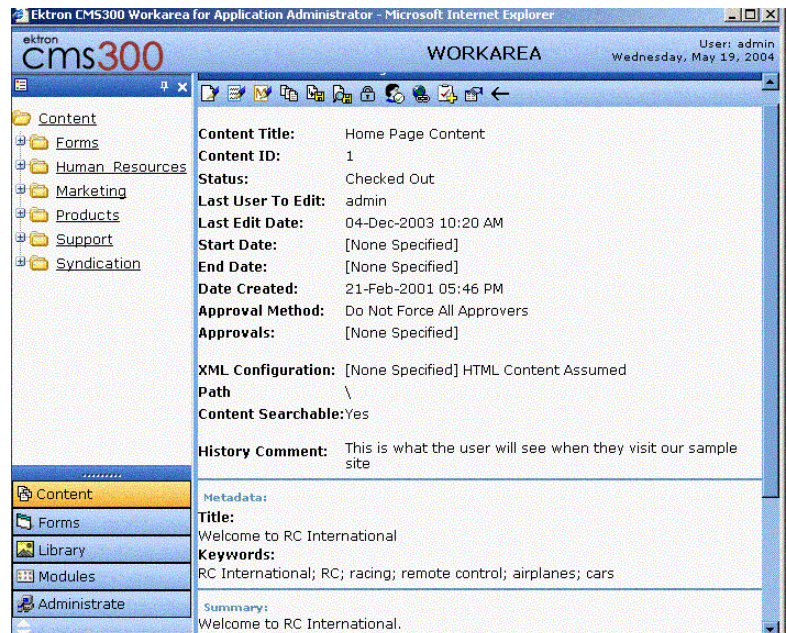
Notice that the content block is now in a checked out state to you. For the changes to take effect on the Web site, you will need to check in the content, and publish it.

E-Mail Notification

Ektron CMS200/300 includes an integrated e-mail system that sends out e-mails to the proper users when a task has been, or needs to be performed. Emails are sent out when one of the following actions take place:

TO	Action
Next Approver	When a content block is submitted to be published
Next Approver	When a content block is submitted to be deleted
Author	When a content block is published to the Web site
Author	When a content block is declined either to be published or deleted

In order for users to be notified of these tasks, the following criteria must be met:

- Valid System Email Address
- Enabled email notification
- User Email Address
- User E-mail notification enabled

Configuring SMTP Server

For information about configuring Microsoft's SMTP service for your Ektron CMS200/300 Web server, please refer to "Configuring E-mail Notifications," in the Ektron CMS200/300 *Setup Manual, Version 4.5, Revision 4*.

Search

NOTE   This section explains how to use the search function on a browser page. For information about inserting the actual search custom function into your Ektron CMS200/300 Web templates, refer to the "Ektron CMS200/300 Developer Manual."

Ektron CMS200/300 has a search function which can be easily integrated into any of your Ektron CMS200/300 Web site templates. The search command will search through all the content in the Ektron CMS200/300 application, then display links to the content blocks it found the searched item in.

When you insert the search function onto a template, it will look like this on the Web site:

When you are performing a search, you will enter the word(s) into the text box provided, select the necessary search preferences, then select the Search button.

Search Options

Before you select one of the search preferences, you must first understand the differences between the four. In each, we will enter the following five words into the search text field:

1.   Partners.
2.   Content.
3.   Monday.

4. Employee.

5. Green.

All the Words

When you select the "All the Words" option, your search will go through all the content and return only the content blocks that include **ALL** the words that were entered in the search text field.

NOTE This works like an AND function. It will return all the content blocks that have the words Partners AND Content AND Monday AND Employee AND Green in it.

Any of the Words

The "Any of the Words" option is almost the opposite. When you select the "any of the words" option, then select search, the search will return all the content blocks that will include at least one of the words that were entered in the search text field.

NOTE This works like the OR function. This search will return the content blocks that include the words Partners OR Content OR Monday OR Employee OR Green.

Exact Phrase

When you select the "Exact Phrase" option, the search will return only the content blocks that will have the five words in the order specified in the search text field.

A better example would be to search for the phrase, "Content Management Solution." The search would yield only the content blocks with that specific phrase.

Match Partial Words

Although you cannot search for wild cards, the "Match Partial Words" option does almost the same. For example, enter "at" into the search text field, then check off the "Match Partial Words" box. When you run the search, it will yield all the content blocks that found the letters "at" in. This search could find words such as **At**, B**at**, Ch**at**ter, **At**oll, **AT**M, etc.

JavaScript Syndication

With the help of some JavaScript, Ektron CMS200/300 now allows you to receive syndicated content from a server other than the one Ektron CMS200/300 is running on. This concept allows you to display or send out content that may or may not be your own.

The content can be viewed on an HTML Web page, instead of a usual .asp page that Ektron CMS200/300 runs with.

This concept will be discussed and explored in the following sections.

What is "Syndication?"

Using JavaScript syndication on a static HTML-based Web site, Web site allows you to retrieve content from an Ektron CMS200/300 Web site and post it on your Web site. When the content gets updated on the Ektron CMS200/300 Web site, it is updated on the static HTML page as well.

Syndication Example

For this example, we will be using the sample Ektron CMS200/300 Web site and a blank static HTML page to display the syndicated content

Let's begin by creating a new content block in Ektron CMS200/300 and enter content about the current weather for New Hampshire.
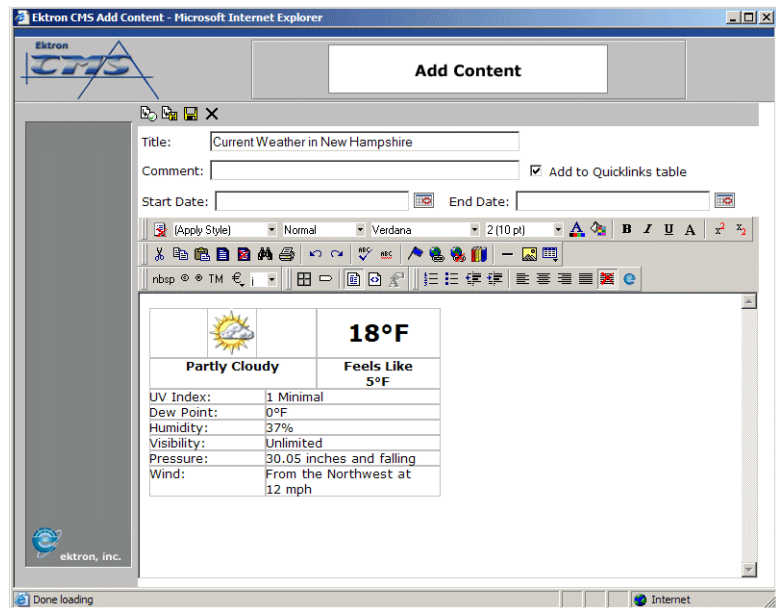
Once we have created our content, we can then publish it so that it is live on the Ektron CMS200/300 Web site.
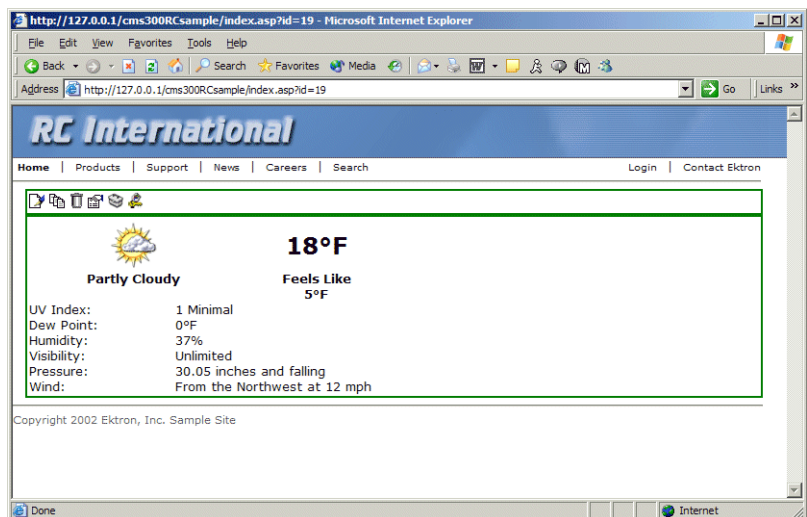
Once the content block has been published, and we know the ID number of it, in this case ID=19, then we can create a static HTML page that will also display this content.

Shown below is the code for the HTML page that we will create.

```
<HTML>
    <HEAD>
        <TITLE>Weather</TITLE>
    </HEAD>
    <BODY>
        <script language="javascript" src="http://192.168.0.156/
        CMS200/300Sample/CMS200/300scripts/jsyndication.asp?id=19"></script>
    </BODY>
</HTML>
```

In this code, the source (src) of the script is made up of three parts:

- The path of the Ektron CMS200/300 Web site
  http://192.168.0.111/CMS200/300Sample/CMS200/300scripts/
- The syndication template
  jsyndication.asp
- The content ID number that will be displayed.
  ?ID=14

NOTE   Each page that will display a syndicated content block MUST have all three parts of the JavaScript included in it to display properly

Once the script has been properly inserted into the HTML page, you can view the syndicated content on the page via your browser:
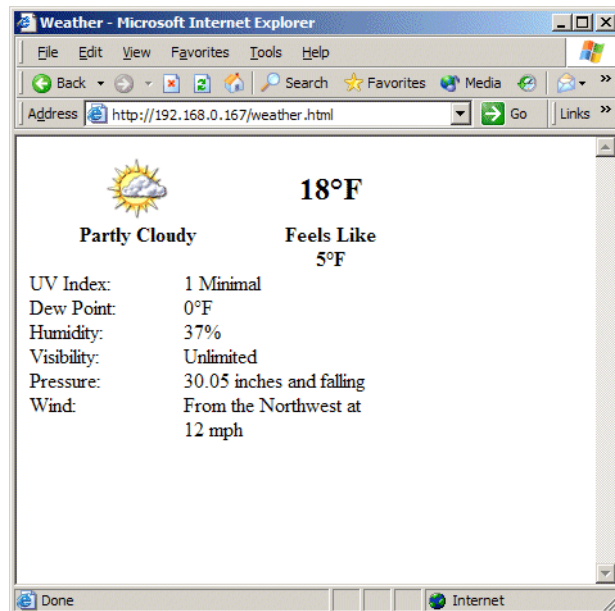
When this content gets changed on the Ektron CMS200/300 Web
site, the content on the HTML page will change as well
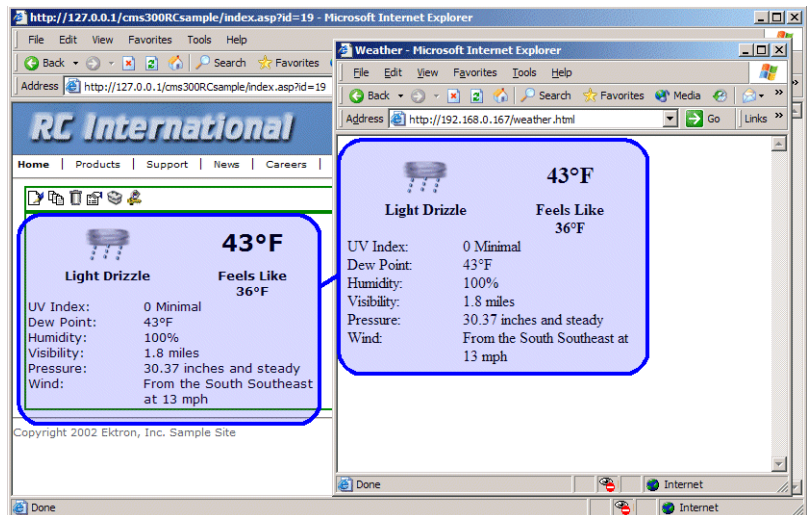
Notice that the two content blocks are the same, and if the content
on the Sample site changes, the content on the static HTML page
will reflect the changes also.

Hosting & Syndication

Syndication can be a very powerful tool if you are a hosting
company. The JavaScript that is used to post syndicated content
can be inserted into ASP, HTML, CFM, or any other types of
templates.

When you are hosting many different Web sites, you will have the
opportunity to have a special place on each of the Web sites where
you could place a piece of syndicated content that could include
up-to-date pricing for your services, information about your hosting
company, etc.

The possibilities become endless when you begin to utilize this
feature, and the time for updating each individual web site gets cut
down.

In the diagram above, the Ektron site is displayed as the hosting
company's web site, where the sample site is the Web site where
the content is also displayed.

Setting up a Syndicated Template

Before a Web site can use your content, you must first set up your Ektron CMS200/300 Web site to send out the content.

The template that is used to syndicate the content is left blank except for the actual code that handles the syndication. This is done so that the content that is being displayed on the other server will only show content that is part of the content block, and no other images that might change the look and feel of the Web site.

This can easily be done by creating a template for Ektron CMS200/300 that has the following custom tag inserted in it, and nothing else.

```
<%option explicit%>
<!-- #include file="setup.asp" -->
<%
dim currentUserID, jsObj
Dim cConts, conObj
Dim ErrString, id, Site

IF (request.cookies("ecm").HasKeys) THEN
 currentUserID = request.cookies("ecm")("user_id")
 Site = request.cookies("ecm")("site_id")
else
 currentUserID=0
 Site = ""
end if

Set jsObj = CreateObject("Scripting.Dictionary")
jsObj.Add "Browser" , Request.ServerVariables("http_user_agent")
jsObj.Add "ServerName" , Request.ServerVariables("SERVER_NAME")
jsObj.Add "ResolveImgPath" , TRUE
jsObj.Add "ResolveHrefPath" , TRUE
jsObj.Add "jsPath",Request.ServerVariables("HTTP_REFERER")
jsObj.Add "ContentID", Request.QueryString("id")
Set conObj = CreateObject("EkBrMach4Content.EkMach4Content")
if (Request.QueryString("id") <> "") then
Set cConts = conObj.jSyndication(AppConfStr, currentUserID, jsObj, Site, ErrString)
if (cConts.Count) then
%>
document.writeln('<% Response.write(
Replace(cConts("ContentHtml"),chr(13),"');document.writeln('") ) %>');
<%
end if
end if
Set jsObj = nothing
%>
```

Ektron CMS200/300 comes installed with a special template named "**jsyndication.asp**." This template has no images, just the custom tag that is seen above.

This is all that is needed to allow other servers to display your content.

Active Directory Feature

The Active Directory feature allows you to retrieve user and user group information from the Microsoft Windows Active Directory (AD) into Ektron CMS200/300. As a result, you can administer user information from one place only, and users need to remember only one password/username combination to sign on to the network and Ektron CMS200/300.

The Active Directory feature has two implementation modes, described in the following table. Choose the mode that best meets your needs.

Mode	Information Shared between AD and CMS	How to Implement	For more information, see
user authentication only	- user logon name - domain - password	On the Active Directory Setup screen, check **Enable Active Directory authentication**.	"User Authentication Only Mode" on page 548
active directory integration	- user logon name - domain - password - user's first and last name - email address - user groups - user's group memberships	On the Active Directory Setup screen, check **Enable Active Directory authentication** and **Enable Active Directory integration**. You may also want to check **Enable automatic addition of user from AD** and **Enable automatic addition of user to groups**.	"Active Directory Integration" on page 516

WARNING! To successfully operate Ektron CMS200/300 with Active Directory, IIS must be running as a domain user account. It cannot be run under a local user account.

If IIS is not running as a domain user account, you receive an "Automation Error" when viewing the Active Directory Setup page.

After Active Directory is installed correctly, you can view the AD Setup page and click edit, but when you try to save the settings, you receive a "User Properties Verification" error. At that point, you must either set up IIS to run as a domain user or the user properties are invalid. After you change the user account under which IIS is running, run "Net Stop IISAdmin" and "Net Start W3SVC" from the DOS prompt before trying to save the settings again.

Active Directory Integration

This chapter covers the following topics:

How Information is Transferred from Active Directory to Ektron CMS200/300

Ektron CMS200/300 does not write to the AD – it only reads from it. This results in the following changes to how user information is handled within Ektron CMS200/300.

- Once you enable AD integration, all changes to user and user group information must be made in the AD -- the Ektron CMS200/300 Edit User and User Group screens change to primarily view screens.

- When adding a new user or user group toEktron CMS200/300, you can only select users and groups in the AD. If the user or user group does not exist in the AD, create them there first, and then import the user or group into Ektron CMS200/300.

Which Information is Transferred from Active Directory to Ektron CMS200/300

Ektron CMS200/300 accesses the following AD user information.

- Authentication (password, user logon name, and domain) for signing in to Ektron CMS200/300.

    The password is not stored in Ektron CMS200/300 – the application only refers to the password during sign in.

- User information, listed in the following table

Field in AD	AD attribute	Corresponding field in Ektron CMS200/300
User logon name (pre-Windows 2000)	sAMAccountName	Domain and Username Note: Users can share a name in different domains. For example, juser/planets.com and juser/saturn.com. Otherwise, user names must be unique.
Last Name	sn	Lastname
First Name	givenName	Firstname
E-mail	mail	E-Mail Address

- user group information, listed in the following table.

Field in AD	AD attribute	Corresponding field in Ektron CMS200/300
Group Name (pre-Windows 2000)	cn	Domain and User group name Note: User groups can share a name in different domains. For example, editors/planets.com and editors/saturn.com. Otherwise, user group names must be unique.

The following diagram illustrates the components of the Active Directory feature.

User is
authenticated
based on
username,
password
and domain
in AD

Authenticate
user

AD administrator
adds users,
groups, and
assigns users to
groups

Active
Directory

All updates to
user
information
must be
performed in
the AD

User
information
within AD is
compared
with user
information in
CMS. User
information
consists of
users, groups
and a user's
membership
in a group

Compare user
and group
information

CMS
200/300

CMS administrator can
import groups, change
email settings, and set
appropriate permissions

CMS user and group
data reflects
replicated subset of
information stored
within AD.

The CMS
database is
updated

Update
information

Logged in

Overview of Active Directory Integration

A key component of this feature is keeping information in the AD consistent with Ektron CMS200/300. The next sections explain

- logging into a system that uses Active Directory integration
- associating user information in AD with Ektron CMS200/300
- how user group information is maintained between systems
- the screens of the Active Directory Feature
- disconnecting AD Database from Ektron CMS200/300 Database

Logging into a System that Uses AD Integration

Because usernames and passwords are stored in the AD by domain, the AD sign-in procedure requires you to select a domain name. So, if AD integration is enabled, the sign-in screen includes a pull-down list that the user clicks to select a domain.
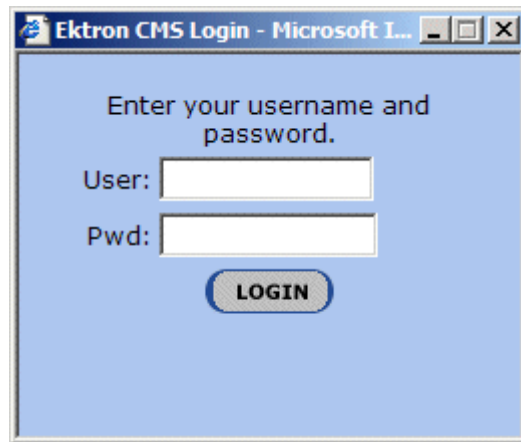
NOTE   Your organization determines AD domain names.

For more information about logging in, see "Logging Into an Ektron CMS200/300 Web Site" on page 11.

Associating User Information in AD with Ektron CMS200/300

A key component of the Active Directory Integration feature is to maintain consistent information between the AD and Ektron CMS200/300 systems. This section explains how user information is transmitted between AD and Ektron CMS200/300 when integration is first enabled and on an ongoing basis.

This section covers the following topics.

- Adding user information from AD to Ektron CMS200/300
- Associating user information when integration is first enabled
- Associating user information after integration is enabled
- Editing user information in Ektron CMS200/300
- Deleting Users
- Replacing a User

Adding User Information from AD to Ektron CMS200/300

Before using the AD integration feature, you should add all AD users that you will use in your Web site into Ektron CMS200/300. To copy an AD user into Ektron CMS200/300, follow these steps.

1. From the left side of the Workarea, click **Users**.

2. Click on the **Add Users** button ( ) from the toolbar.

3. The Search Active Directory for Users screen appears.
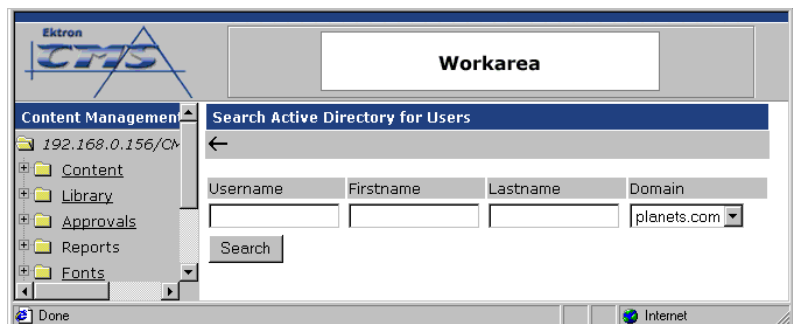
4. From the **Domain** pull-down list, select the domain from which you want to add a user.

---

5. Enter as much information as you know into the other fields.

6. Click on the **Search** button.

   A new screen displays all users that satisfy the search criteria you entered.

7. Click the check box under the **Add** column to add users to Ektron CMS200/300.

8. Click on the Save button () to add AD users to Ektron CMS200/300.

   The View Users in Group "Everyone" screen appears, displaying the new user and the other Ektron CMS200/300 users.

When Integration is First Enabled

Ektron CMS200/300 Database Already Implemented

If **Enable automatic addition of user from AD** is checked on the Active Directory Setup screen, user information is copied from the AD to Ektron CMS200/300 when that user logs in or when the user is added to Ektron CMS200/300.

See Also: "The Active Directory Setup Screen" on page 530

The first time the user information is copied, the AD information overwrites all Ektron CMS200/300 information. To learn how information is updated from then on, see "After Integration is Enabled" on page 522.

If two or more AD users have the same Ektron CMS200/300 user logon name but different domains (for example, JDoe in Eng.Acme.com and JDoe in Mkt.Acme.com) and that username (JDoe) also exists in Ektron CMS200/300, the Active Directory Setup and Active Directory Status screens highlight this discrepancy using the following message:

CMS users need to be associated with Active Directory users.

Click the message to proceed to the Associate Ektron CMS200/300 Users to Active Directory Users screen and associate an AD user with the Ektron CMS200/300 user.

See Also: "Associating Ektron CMS200/300 Users with Active Directory Users" on page 536

Ektron CMS200/300 is Being Installed, so No User Database Exists

Go to the Search Active Directory for Users Screen and select AD users that will use Ektron CMS200/300. When you add a user, the user information is copied from the AD to Ektron CMS200/300.

See Also: "The Search Active Directory for Users Screen" on page 541

NOTE   You can only select AD users that do not already exist in Ektron CMS200/300. Also, the Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for users within that domain.

After Integration is Enabled

User information is copied from the AD to Ektron CMS200/300 whenever either of these events occurs:

- the user logs in.

- someone clicks the Refresh button ( ) on the user's View User Information screen.

See Also: "The View User Information Screen" on page 540

If a user's last name, first name, email field, or group membership changed in the AD, those changes are copied to Ektron CMS200/ 300. However, if a user's *logon name* changed in the AD, that change is not copied to Ektron CMS200/300 because Ektron CMS200/300 uses that field to identify the user. Instead, that discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS200/300 Users to Active Directory Users screen, where you can update the AD user who is associated with the Ektron CMS200/300 user.

See Also: "Associating Ektron CMS200/300 Users with Active Directory Users" on page 536

Editing User Information in Ektron CMS200/300

Because **Ektron CMS200/300** does not write to the AD, you can only change the **User Language** and **Disable E-Mail Notifications** fields within the Ektron CMS200/300 Edit User screen. You must edit all other user fields from the AD.

Deleting Users

If a user is deleted in AD, Ektron CMS200/300 does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

The user remains in Ektron CMS200/300, and the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should delete the user from Ektron CMS200/300 using the Delete User function.

See Also: "Deleting A User" on page 170

| **NOTE** | If you mistakenly delete all users with administrative privileges, you can still sign in using the builtin user's username and password. For more information, see "BuiltIn User" on page 25. |

Replacing a User

If you associate the wrong AD user with a Ektron CMS200/300 user, you can replace the user. If you do so, all Ektron CMS200/300 privileges and workflow responsibilities assigned to the old user are transferred to the new one.

Follow these steps to associate a Ektron CMS200/300 user with a new AD user.

1. From the left side of the Workarea, click **Users**.
2. Click the user that you want to replace.
3. Click on the **Associate CMS User with Different AD User** button ( ).
4. Select a user to replace the user you selected in Step 2.
5. Click on the **Save** button ( ) to finalize the change.

When you complete this procedure, the first user is deleted from Ektron CMS200/300.

User Groups

This section explains how a user's group membership is copied from the AD to the Ektron CMS200/300 system when integration is first enabled, and then on an ongoing basis. Once assigned to a group, the user automatically receives all Ektron CMS200/300 privileges and workflow responsibilities associated with it.

NOTE The Active Directory has two kinds of user groups: security and distribution. Ektron CMS200/300 does not distinguish between them – as long as a user is a member of either kind of group, group information is imported to Ektron CMS200/300.

This section explains the following topics.

- Copying user group information from AD to Ektron CMS200/300
- Associating a user's AD group information with Ektron CMS200/300
- Mapping the administrator group
- User belongs to AD group that does not exist in Ektron CMS200/300
- User belongs to Ektron CMS200/300 group that does not exist in AD
- Removing users from a group
- Adding user groups
- Adding a user to a group
- Replacing a user group
- Deleting a user group

Copying User Groups from AD to Ektron CMS200/300

Before using the AD integration feature, you should copy all AD groups that you will use in your Web site into Ektron CMS200/300. To copy an AD group into Ektron CMS200/300, follow these steps.

1. From the left side of the Workarea, click on the **User Groups** folder.

2. Click on the **Add Groups** button ( ).

   The Search Active Directory for Groups screen appears.
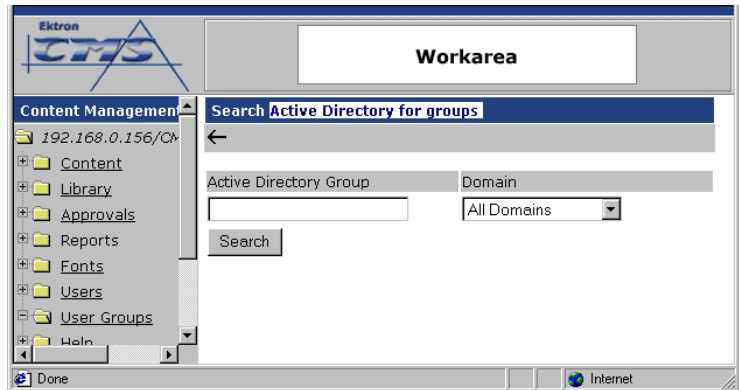
3. From the **Domain** pull-down list, select the domain from which you want to add a user group.

NOTE   The Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for groups within that domain.

4. Enter as much information as you know into the Active Directory Group field.

5. Click on the **Search** button.

   A new screen displays all groups that satisfy the search criteria.

6. Click the check box under the **Add** column to add users to Ektron CMS200/300.

7. Click on the **Save** button ( ) to add AD groups to Ektron CMS200/300.

   The View Users Groups screen appears, displaying the new group along with all other Ektron CMS200/300 groups.

Associating a User's AD Group Information with Ektron CMS200/300

When Integration is First Enabled

Ektron CMS200/300 User Database Already Exists

If **Auto Add User To Group** is checked (on the Active Directory Setup screen), a user's group membership is first copied from the AD to Ektron CMS200/300 or when a user logs in or is added. At this time, any AD group memberships overwrite Ektron CMS200/300 group memberships *except* the Everyone group, to which all users belong.

NOTE   The Everyone group, unlike other Ektron CMS200/300 groups, is not associated with an AD group. It is an all-encompassing group with no special permissions.

If a user belongs to an AD user group that does not exist in Ektron CMS200/300, nothing happens because the feature assumes that all AD groups are not meaningful in Ektron CMS200/300.

If a user belongs to an Ektron CMS200/300 user group that does not exist in AD, the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. From these screens, you can copy the AD group information into Ektron CMS200/300.

See Also: "Associating User Group Membership with Active Directory User Group Membership" on page 537 and "Associating Groups with Active Directory Groups" on page 538

To learn how membership is updated from then on, see "After Integration is Enabled" on page 526.

Ektron CMS200/300 is Being Installed, so No User Groups Exist

Follow the procedure described in "Copying User Groups from AD to Ektron CMS200/300" on page 524 to copy AD user groups to Ektron CMS200/300. As users in those groups are added to Ektron CMS200/300, their group membership is copied from AD to Ektron CMS200/300.

After Integration is Enabled

A user's group membership is updated in Ektron CMS200/300 when all of the following are true:

- The **Enable automatic addition of user to groups** field is checked on the Active Directory Setup screen

- A user is added to Ektron CMS200/300 or his group membership changes in the Active Directory

- The user logs in or someone clicks on the **Refresh** button (🔄) on the user's View User Information screen

Mapping the Administrator Group

On the Ektron CMS200/300 Active Directory Setup screen, you can identify an AD user group that maps to the Ektron CMS200/300 Administrator group.
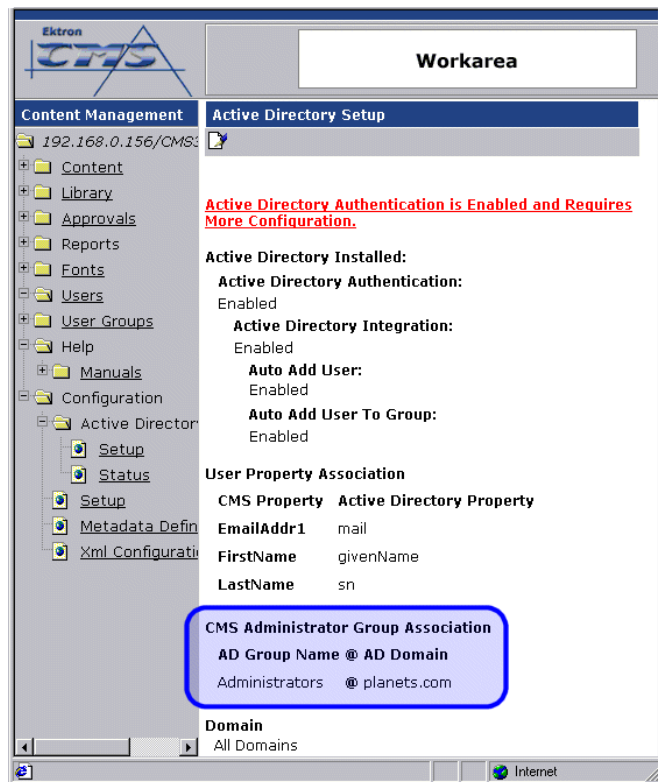
Administrators have access to all functions documented in this manual. (Unlike other Ektron CMS200/300 user groups, whose names are copied from the AD, the Administrator and Everyone group names cannot be changed.)

For example, if the AD has a user group named CMSAdmin whose members should have the privileges of Ektron CMS200/300 Administrators, assign that group to Administrators on the Active Directory Setup screen. If such a group does not exist in AD yet, you should create it and then assign it on the Active Directory Setup screen.

Note that only one AD group can be mapped to the Ektron CMS200/300 Administrator group -- you cannot have an AD administrator group within each AD domain.

See Also: "The Active Directory Setup Screen" on page 530

User Belongs to AD Group that Does Not Exist in Ektron CMS200/300

If user is assigned to an AD user group that does not exist in Ektron CMS200/300, nothing happens. The AD integration feature assumes that an Ektron CMS200/300 administrator only maintains user groups that are meaningful to Ektron CMS200/300, and not all AD groups may be meaningful to Ektron CMS200/300.

NOTE   If a user belongs to a user group that is given Membership permissions, but also to a group that has CMS permissions, the user will only receive Membership permissions if logged into Ektron CMS200/300.

User Belongs to Ektron CMS200/300 Group that Does Not Exist in AD

If a user was a member of a user group in Ektron CMS200/300 before integration was enabled, but does not belong to that group in the AD, this discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

If the user should belong to the AD group, add the group membership within the AD. Then, refresh the user on these screens to copy AD group information into Ektron CMS200/300.

See Also: "Associating Groups with Active Directory Groups" on page 538

Removing Users from a Group

If you delete a user from an AD group, the user is automatically removed from the associated Ektron CMS200/300 group the next time the user's information is updated (as explained in "After Integration is Enabled" on page 522).

Adding User Groups

Once AD integration is enabled, you can only add new user groups in the AD. In Ektron CMS200/300, use the Search Active Directory for Groups screen to copy an AD user group to Ektron CMS200/300. You can only add groups that do not already exist in Ektron CMS200/300. This procedure is described in "Copying User Groups from AD to Ektron CMS200/300" on page 524.

Adding a User to a Group

You cannot add a user to a user group within Ektron CMS200/300 -- you must do so in the Active Directory.

Replacing a User Group

If you realize that you have associated the wrong AD user group with an Ektron CMS200/300 user group, you can replace the user group. Follow these steps to do so.

1. From the left side of the Workarea, click **User Groups**.
2. Click the user group that you want to replace.
3. Click the Associate Ektron CMS200/300 Group with Different

   AD Group button ( ).
4. Select a group to replace the group you selected in Step 2.
5. Click the Save button ( ) to finalize the change.

Deleting a User Group

Deleting a User Group in AD

If you delete a user group in AD and users are assigned to the group within Ektron CMS200/300, the group is not automatically deleted in Ektron CMS200/300. However, any Ektron CMS200/300

users who were members of the group are no longer members the next time their Ektron CMS200/300 information is updated. The discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

Deleting a User Group in Ektron CMS200/300

If you delete a user group in Ektron CMS200/300 and users are assigned to that group within AD, nothing happens. This is because the AD Integration Feature assumes that, in Ektron CMS200/300, the administrator only sets up user groups that are meaningful to Ektron CMS200/300, and some AD groups are not meaningful to Ektron CMS200/300.

The Screens of the Active Directory Feature

The Active Directory feature uses the following screens:

- the Active Directory Setup screen
- the Active Directory Status screen
- the View Users Screen
- the View User Groups Screen

This section explains how to use each screen.

The Active Directory Setup Screen

The Active Directory Setup screen (illustrated below) lets you enable and disable the Active Directory feature, as well as determine other aspects of AD management, such as whether users and groups are automatically updated. To access the screen,

click **Configuration -> Active Directory -> Setup** from the left panel of the Workarea.
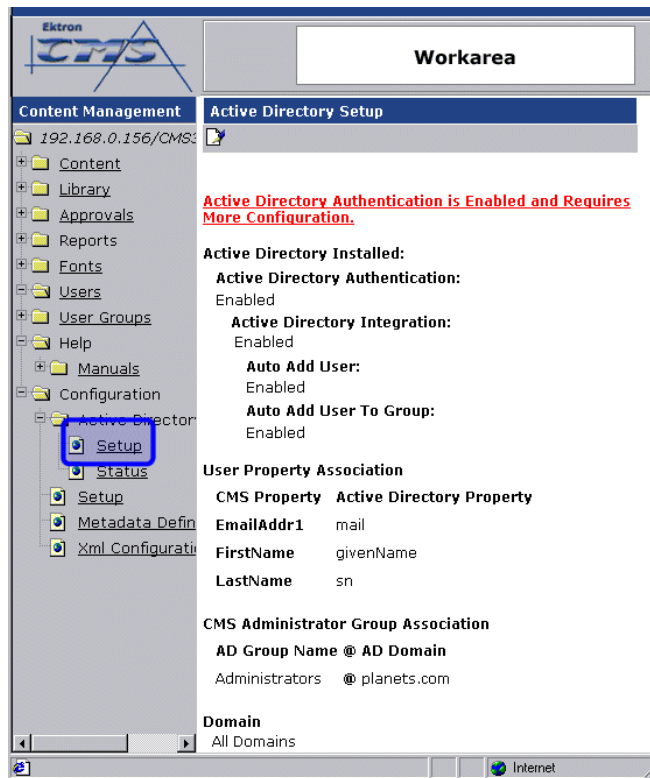
The following table describes the fields on the screen.

See Also: "Messages Near the Top of the Active Directory Setup Screen" on page 534

Field	Description	For more information, see
Active Directory Installed		
Active Directory Authentication	If enabled, user authentication is functional, and you can enable the following three fields.	"User Authentication Only Mode" on page 548
Active Directory Integration	If enabled, the Active Directory feature is functional. Can only be enabled if Active Directory Authentication is enabled.	"Active Directory Integration" on page 516

Field	Description	For more information, see
Auto Add User	If enabled, user information is copied from the AD to Ektron CMS200/300 when that user logs in or when the user is added to Ektron CMS200/300. Can only be enabled if Active Directory Integration is enabled.	"Associating User Information in AD with Ektron CMS200/300" on page 520
Auto Add User To Group	If enabled, a user's group membership is first copied from the AD when a user logs in or is added. Can only be enabled if Active Directory Integration is enabled.	"User Groups" on page 524
User Property Mapping		
FirstName	Enter the Active Directory Property that maps to the user's first name in Ektron CMS200/300. By default, this is set to givenName, but you can change it to any AD property.	MSDN Library (http://msdn.microsoft.com/library/default.asp)> Active Directory, ADSI and Directory Services > Directory Services > Active Directory > Active Directory Reference > Active Directory User Interface Mappings.
LastName	Enter the Active Directory Property that maps to the user's last name in Ektron CMS200/300. By default, this is set to sn, but you can change it to any AD property.	same reference as FirstName (above)
EmailAddr1	Enter the Active Directory Property that maps to the user's last name in Ektron CMS200/300. By default, this is set to mail, but you can change it to any AD property.	same reference as FirstName (above)
Ektron CMS200/300 Administrator Group Mapping		

Field	Description	For more information, see
AD Group Name @ AD Domain	Enter the Active Directory user group and domain name that maps to the hard coded Ektron CMS200/300 administrator group. If you do not have an AD user group that includes all Ektron CMS200/300 administrators, you should create one and enter its name and domain here.	"Mapping the Administrator Group" on page 527
Domain	If you want to restrict the search of new users and groups to one AD domain, select that domain. If you do, the Search Active Directory for Users and Search Active Directory for Groups screens let you search in the selected domain only. Also, if any Ektron CMS200/300 user or group names include a domain (for example, admin@saturn.planets.com) that is excluded by your selection, those users/groups are flagged on the Active Directory Setup and Active Directory Status screens because the names now include an invalid domain.	

Messages Near the Top of the Active Directory Setup Screen

Message	Explanation
Active Directory Authentication is Enabled and Requires More Configuration.	Some Ektron CMS200/300 users are not associated with AD users. Also, if you are using full active directory integration mode, user groups and/ or user group relationships may not be associated.
Active Directory Authentication is disabled, but needs further configuration	Some Ektron CMS200/300 users and/or groups are no longer unique. This happens because, in the AD, users and groups can share a logon name as long as their domains are different. But, when AD authentication is disabled, two Ektron CMS200/300 users or groups can no longer share a name -- each name must be unique.

If you see either message, click it. You proceed to the Active Directory Status screen, which helps you resolve the discrepancies.
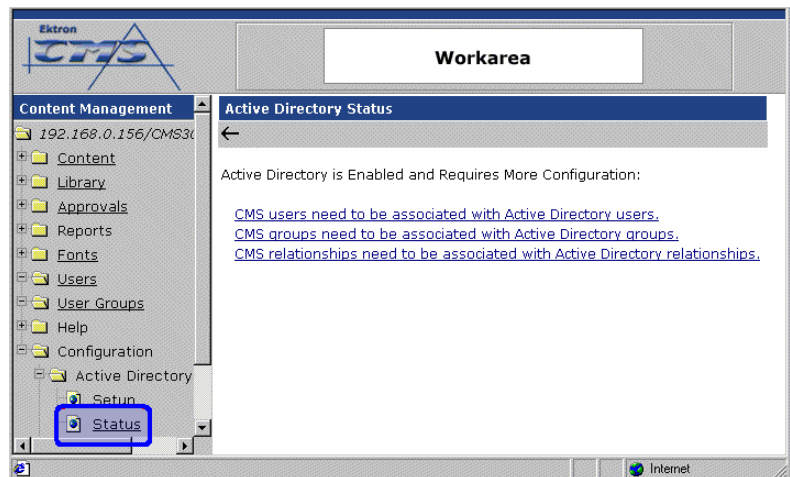
The Active Directory Status Screen

Use the Active Directory Status screen to resolve the following discrepancies between Ektron CMS200/300 and AD.

- an Ektron CMS200/300 user needs to be associated with an AD user
- an Ektron CMS200/300 user group needs to be associated with an AD user group
- an Ektron CMS200/300 user's group membership need to be associated with the same AD user's group membership

To access the screen, click **Configuration -> Active Directory -> Status** from the left panel of the Workarea.

There are several reasons why such discrepancies may occur. To learn more about why

- an Ektron CMS200/300 user is not associated with an AD user, read "Associating User Information in AD with Ektron CMS200/300" on page 520.
- an Ektron CMS200/300 user's group membership is not associated with the user's AD group membership, read "Associating a User's AD Group Information with Ektron CMS200/300" on page 526
- an Ektron CMS200/300 group is not associated with an AD group, read "User Groups" on page 524

If you click any link on the Active Directory Status screen, a new screen appears that allows you to resolve the discrepancy. For information on how to use these screens, see

- Associating Ektron CMS200/300 Users with Active Directory Users
- Associating Ektron CMS200/300 User Group Membership with Active Directory User Group Membership
- Associating Ektron CMS200/300 Groups with Active Directory Groups

Associating Ektron CMS200/300 Users with Active Directory Users

If you click **CMS users need to be associated with Active Directory users** on the Active Directory Status screen, the Associate Ektron CMS200/300 Users with Active Directory Users screen appears (illustrated below). Use this screen to associate Ektron CMS200/300 users with AD users.

If a user with the same username exists in the AD, that name and domain appear by default in the **AD Username** and **AD Domain** fields. If the user exists in the more than one AD domain (as illustrated in the first example above), select a domain from the pull-down list.

If there is no default and you know the AD user name to associate with an Ektron CMS200/300 user, enter that in the **AD Username** and **AD Domain** fields. If you do not know the AD username, click **Search** to find the user in the AD.

If you decide to change the username in AD to match the Ektron CMS200/300 username, make the change in the AD. Then, click the Refresh button ( ) to update Ektron CMS200/300 and resolve the discrepancy.

Finally, if this user should not exist in the Ektron CMS200/300 database, click the box under the **Delete** column to delete the user from Ektron CMS200/300.

After you make all necessary changes, click the Save button ( ) to save them.

Associating User Group Membership with Active Directory User Group Membership

If you click **CMS relationships need to be associated with Active Directory relationships** on the Active Directory Status screen, the Associate Ektron CMS200/300 Relationships with Active Directory Relationships screen appears (illustrated below). Use this screen to coordinate Ektron CMS200/300 user group membership with AD user group membership.

The screen displays a user's group membership that exists in Ektron CMS200/300, but does not exist in the AD.

*See Also:* "Associating a User's AD Group Information with Ektron
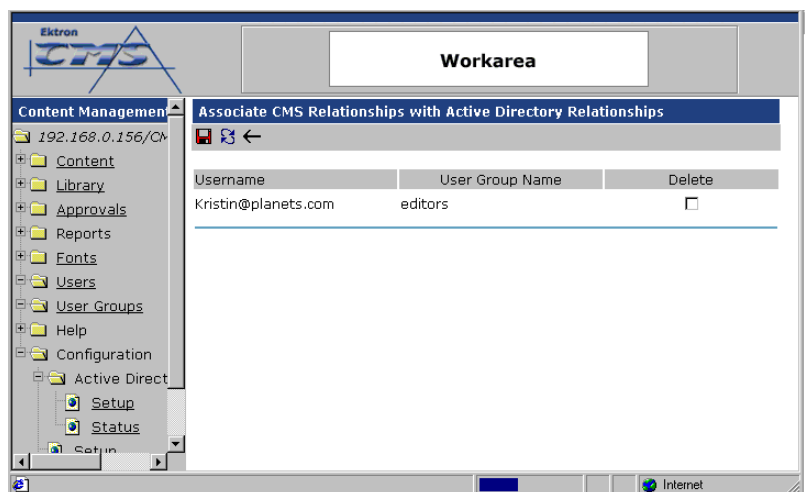
After viewing the discrepancy on the screen, you have two choices:

- To associate the user with the same user group in the AD, go to the AD and assign the user to the group. Then, return to this screen and click the Refresh button (![refresh icon]) to update the user group information in Ektron CMS200/300.

- To remove the user's group membership in Ektron CMS200/ 300, check the box under the **Delete** column and click the Save button (![save icon]).

Associating Groups with Active Directory Groups

If you click **CMS groups need to be associated with Active Directory groups** on the Active Directory Status screen, the Associate Ektron CMS200/300 User Groups with Active Directory Groups screen appears (illustrated below). Use this screen to associate Ektron CMS200/300 groups with AD groups.
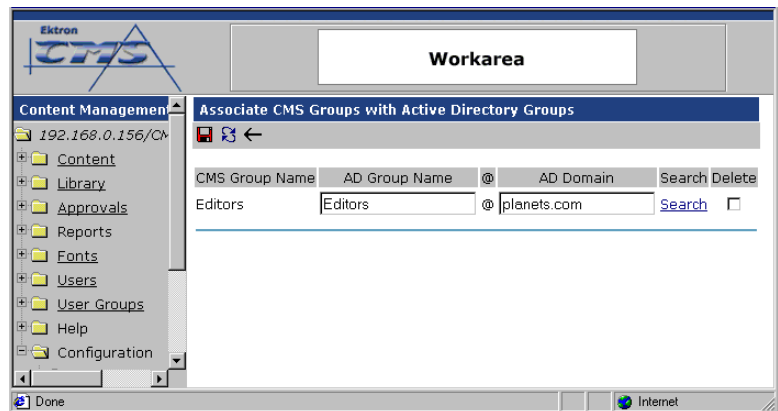
If a group with the same groupname exists in the AD, that name appears by default in the **AD Group Name** field. If the group exists in the more than one domain within the AD, select a domain from the pull-down list.

If there is no default and you know the AD group name to associate with an Ektron CMS200/300 group, enter that in the **AD Group Name** and **AD Domain** fields. If you do not know the AD groupname, click **Search** to find the group in the AD.

Finally, if this group should not exist in the Ektron CMS200/300 database, click the box under the **Delete** column to delete the group from Ektron CMS200/300.

After you make all necessary changes, click the Save button (🖫) to save them.
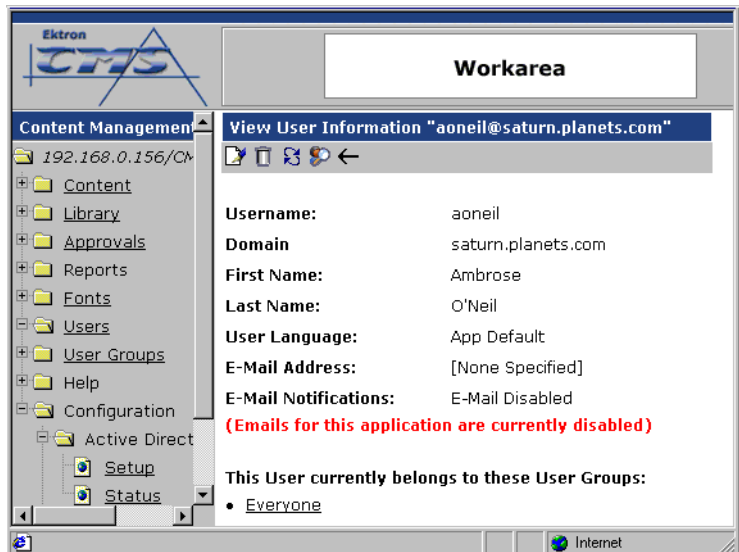
The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS200/300 database. To access the screen, click **Users** from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.
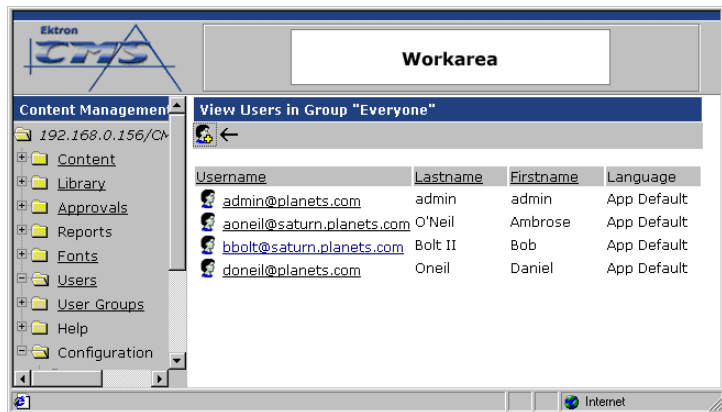
The View Users screen also provides a toolbar button (🖼) that lets you add AD users to the Ektron CMS200/300 database. When you click it, the Search Active Directory for Users Screen appears.

The View User Information Screen

The View User Information Screen displays the user's

- username and domain
- first and last name
- language
- email address and whether the user receives email notifications
- user groups

If you are using *user authentication mode*, **username** and **domain** can only be edited in the AD. You can edit all other fields on this screen.

If you are using *full AD Integration mode*, you can only edit **language** and whether the user receives email notifications. You must edit the other fields in the AD.

The screen also displays the following buttons.

| Button	Description
	Edit information on screen
	Delete user *See Also:* "Deleting Users" on page 523
	Retrieve latest information from AD into Ektron CMS200/300 *See Also:* "After Integration is Enabled" on page 522 This icon does not appear if you are using user authentication mode.
	Replace user *See Also:* "Replacing a User" on page 523
	Return to previous screen

The Search Active Directory for Users Screen

Use this screen to add AD users to Ektron CMS200/300. To access the screen, click **Users** from the left panel of the Workarea, then click the Add button ().
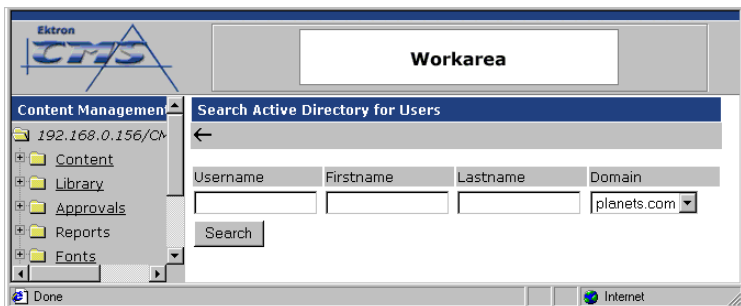
Enter as much search criteria as you know to reduce the number of users that the search yields. For example, if you know that the user's last name is Jackson and the user is in the planets domain, enter those criteria and you will get many fewer "hits."

When the Active Directory Users screen appears, click the box next to users that you want to create in Ektron CMS200/300. Then, click the Save button () to copy their information into Ektron CMS200/300.

The View User Groups Screen

The View User Groups Screen displays all AD user groups that have been copied into Ektron CMS200/300. (See "Copying User Groups from AD to Ektron CMS200/300" on page 524).

To access the screen, click **User Groups** from the left panel of the Workarea.
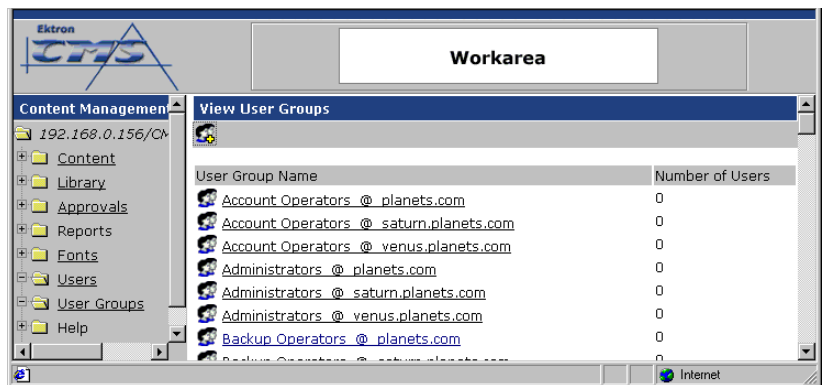
To view more information for a group, click that group to move to the View Users in Group screen.

The View User Groups screen also provides a toolbar button () that lets you add AD groups to the Ektron CMS200/300 database. When you click it, the Search Active Directory for Groups screen appears.

View Users in Group Screen

The View Users in Group Screen displays, for each user in the group

- username and domain
- first and last name

- language
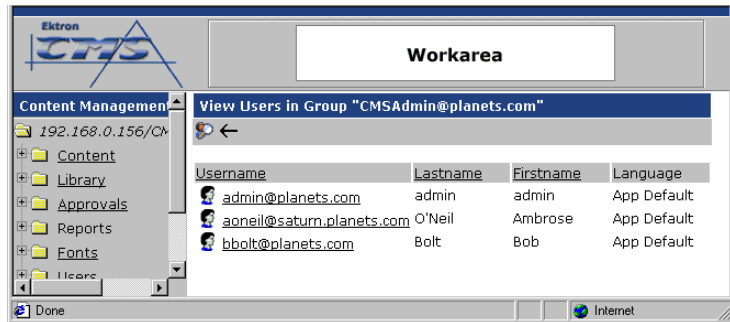
The screen also displays the following buttons.

Button	Description
	Replace group *See Also:* "Replacing a User Group" on page 529
←	Return to previous screen

The Search Active Directory for Groups Screen
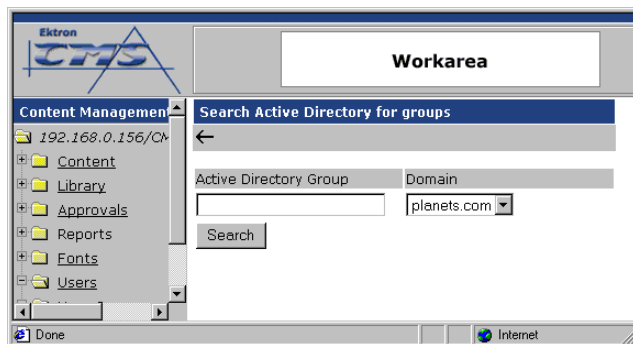
Use this screen to add AD groups to Ektron CMS200/300. Enter as much search criteria as you know to reduce the number of groups that the search yields.

For example, if you know that the group begins with S and is in the planets domain, enter those criteria and you will get many fewer "hits."

After you click Search, a new screen appears listing all AD groups that satisfy the search criteria. Click the box next to groups that you want to create in Ektron CMS200/300. Then, click the Save button () to copy their information.

Setup Guidelines

1. Make sure that the users and user groups in the Active Directory are defined correctly. Remember that, when you enable AD integration, first name, last name and email are copied from AD to Ektron CMS200/300.

2. Determine which AD users and groups will be used in your Ektron CMS200/300.

3. Try to match up names. For example, if a user in Ektron CMS200/300 has the username of jsmith, but that user in AD has a username of john.smith, rename the user in Ektron

CMS200/300 or in Active Directory so they match. This can be done during the actual integration, but doing it beforehand will simplify the process later.
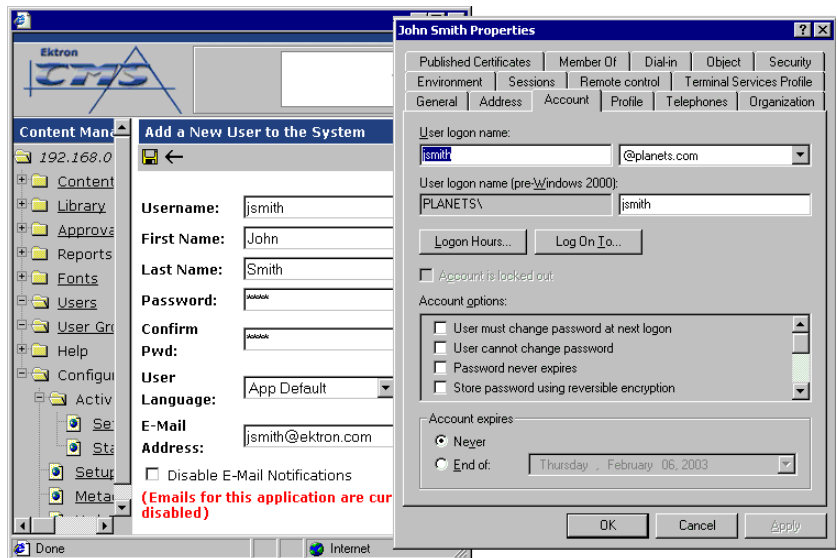
4. Determine which users should be in which groups, and make sure those relationships exist in both Ektron CMS200/300 and AD.

5. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS200/300 to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)

6. Determine if you want users to automatically be added at login or if you want to manually add them all yourself. (You will use this when completing the **Enable automatic addition of user from AD** field of the Active Directory Setup Screen.)

7. Determine if you want user groups to be associated at login or if you want to manually associate them. (You will use this when completing the **Enable automatic addition of user to groups** field of the Active Directory Setup Screen.)

Disabling AD Integration

If you decide to disable AD authentication or integration, edit the Active Directory Setup screen and uncheck the box next to **Enable**

Active Directory Authentication or **Enable Active Directory Integration**.

See Also: "The Active Directory Setup Screen" on page 530

If you do this, and any users or groups share the same name within different domains, the following message appears on the screen.

Active Directory Authentication is disabled, but needs further configuration

For example, two users are named JJackson@saturn.com and JJackson@planets.com. When AD was enabled, the domain names made the two users unique. However, when you disable integration, the domain names are dropped, so the user names are now identical. You need to make the users unique.

If you click the message (above) on the Active Directory Setup screen, you move to the Active Directory Status screen. The following messages may appear.
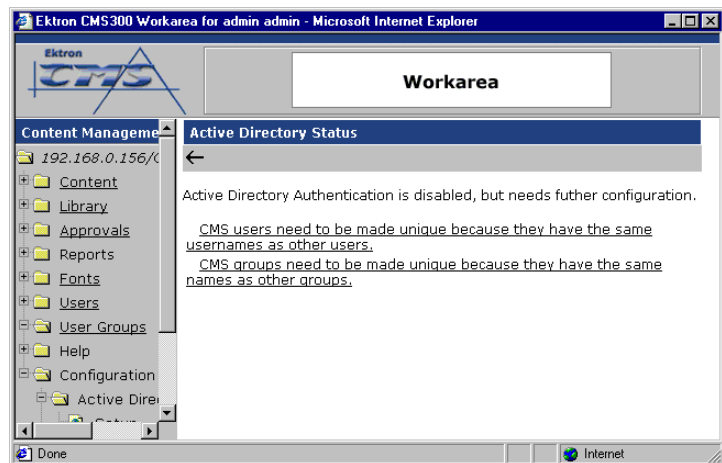
Click the message to proceed to the Make Ektron CMS200/300 Users Unique screen (illustrated below).
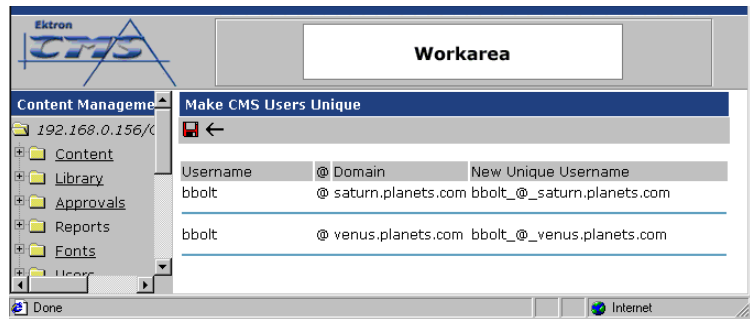
This screen lists all users whose user names are not unique and suggests a new, unique Ektron CMS200/300 username. The new name consists of the user name, underscore, at sign (@), underscore, the domain name. So, for example, JJackson@saturn.com would appear as JJackson_@_saturn.com.

The same is true for user groups. For example, if you had two groups name Account Operators, one in the planets.com domain and another in the saturn.planets.com domain, the Make Ektron CMS200/300 Groups Unique screen would look like this.
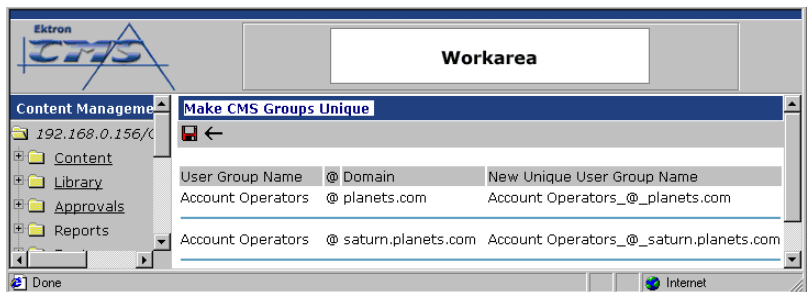
Ektron recommends that you accept the suggested new names.

Click the Save ( ) button to do so.

One advantage of using the new name format is that, if you later decide to re-enable AD integration, the software can automatically associate the AD and Ektron CMS200/300 users or groups.

User Authentication Only Mode

How Information is Transferred from Active Directory to Ektron CMS200/300

Ektron CMS200/300 does not write to the AD – it only reads from it. This results in the following changes to how the username, domain, and password are handled within Ektron CMS200/300.

- Changes to user logon name, domain and password must be made in the AD — you cannot update these fields in the Ektron CMS200/300 Edit User screens.

- When adding a new user to Ektron CMS200/300, you can only select AD users. If the user does not exist in the AD, create the user there, and then import the user into Ektron CMS200/300.

Which Information is Transferred from Active Directory to CMS

CMS refers to the following AD sign-in authentication information during sign-in: password, user logon name, and domain. Note that the password is not stored in CMS — CMS only refers to the password during sign-in.

Logging In

See

Adding User Information from AD to Ektron CMS200/300

Changing the User Login Name in AD

If a user's *logon name* changes in the AD, it no longer matches the Ektron CMS200/300 logon name. This discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS200/300 Users to Active Directory Users screen, where you can update the user information.

Alternatively, you could

1. Go to the View User Information screen.
2. Select the user whose AD name changed.
3. Click the Associate the Ektron CMS200/300 user with Different AD user icon ( ).
4. Select the AD user and domain.

See Also: "Associating Ektron CMS200/300 Users with Active Directory Users" on page 536

Editing User Information in Ektron CMS200/300

Ektron CMS200/300 does not write to the AD. This means that you can only change the **Username** and **Domain** fields from the AD.

You can change the **First Name**, **Last Name**, **E-Mail Address**, **User Language** and **Disable E-Mail Notifications** fields on the Ektron CMS200/300 Edit User screen.

Deleting Users

See "Deleting Users" on page 523

Replacing a User

See "Replacing a User" on page 523

IMPORTANT!	If you replace a user in user authentication-only mode, the user's first name, last name, and email address are not overwritten with information in the active directory.

User Groups

User authentication mode has no effect on user groups. To learn more about user groups, see "Managing User Groups" on page 171.

The Screens of the Active Directory Feature in User Authentication Mode

Since the scope of user authentication mode is limited, only some fields on the AD screens are used. For example, on the Active Directory setup screen, the only relevant fields are authentication and domain.

See Also: "The Active Directory Setup Screen" on page 530

Also, on the Active Directory Status Screen, only one discrepancy message may appear:

CMS user needs to be associated with an AD user

See Also: "Associating Ektron CMS200/300 Users with Active Directory Users" on page 536

The View Users Screen works the same for both modes.

See Also: "The View User Information Screen" on page 540

Setup Guidelines

1. Make sure that each AD user to be used in Ektron CMS200/ 300 is defined correctly in the Active Directory. Remember that, when you enable AD integration, logon name and domain are copied from AD to Ektron CMS200/300.

2. Try to match up names. For example, if an Ektron CMS200/300 user's username is jsmith, but that user's AD username is john.smith, rename the user in Ektron CMS200/300 or Active Directory so they match. While you can match user names when authentication is enabled, doing it beforehand simplifies the process.
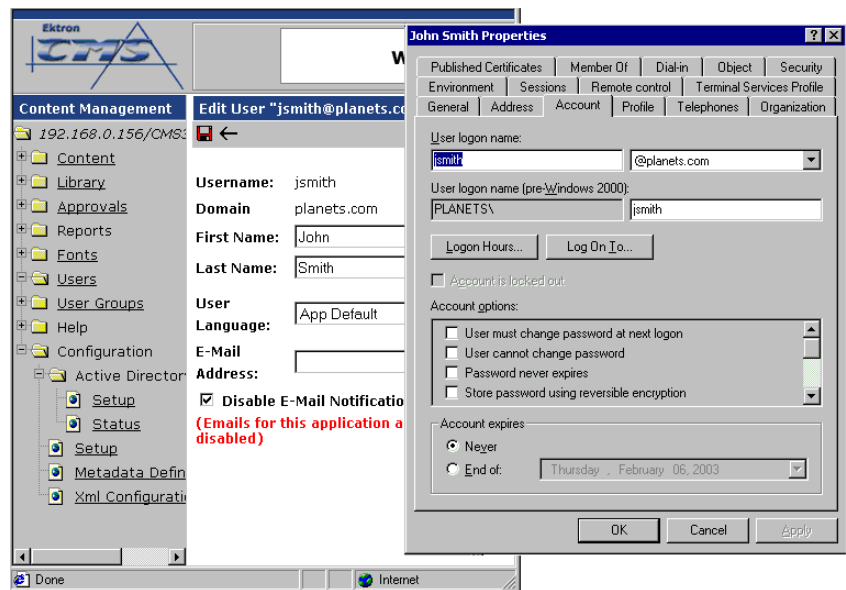
3. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS200/300 to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)

Disabling AD Authentication

See

Custom Display Functions

For information about inserting Ektron CMS200/300 custom functions into your Web templates, please refer to the Ektron CMS200/300 *Developer's Manual, Version 4.5, Revision 4.*

Additional Information

Supporting Documents

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

- *Ektron CMS200/300 Developer's Reference Manual*

- *Ektron CMS200/300 User Manual*

- *Ektron CMS200/300 Administrator Quick Start Manual*

- *Ektron CMS200/300 Setup Manual*

Support

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

http://www.ektron.com/support/cms300_support.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

Information

For general information about Ektron and its products, you may send an e-mail to:

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