Ektron

Redefining Web Content Management

Ektron CMS300 SharePoint Portal Server 2003 Integration Manual

Version 1.0

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Before You Begin...

Before you begin using the Ektron CMS300 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 CMS300 Web parts, as well as overview information about Microsoft SharePoint Portal Server 2003.

Once completed, you can then move onto ”Ektron CMS300 Web Parts” on page 16 for information about how to use the Ektron CMS300 Web parts.

Overview

Ektron CMS300 has been configured to easily be integrated within Microsoft’s SharePoint Portal Server.

Each of Ektron CMS300’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 CMS300 and the power of Microsoft SharePoint Portal Server, users can easily access, share, and manage Ektron CMS300 Web site content from a single application.

This section explains how Ektron CMS300 easily, and seamlessly, integrates with Microsoft SharePoint Portal Server,

Prerequisites

Described in this section ar the prerequisites for integrating Ektron CMS300 with SharePoint Portal Server

Ektron CMS300 Server

On your server that is running Ektron CMS300 you must have a directory under your root Ektron CMS300 that contains the necessary SharePoint Portal Server .aspx display pages.

These are commonly inserted into the following directory:

\CMS300Scripts\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 CMS300 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 CMS300 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 CMS300 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 CMS300 Web Parts
- Registers all Web Parts in your SharePoint Web.config file
- Adds a necessary reference to your Ektron CMS300 Web site within your Web.config file

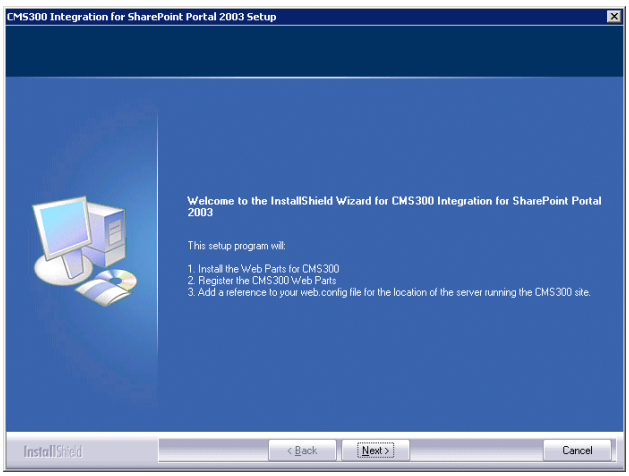
Performing the Installation

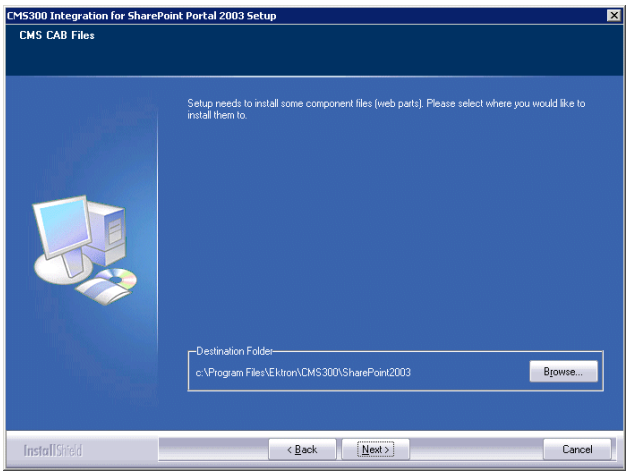
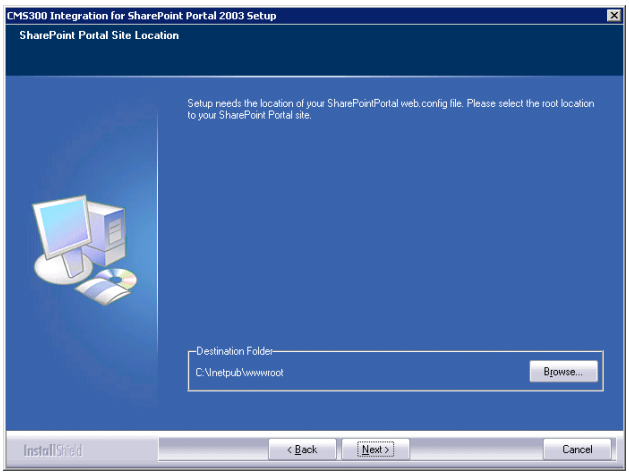
To configure your SharePoint Portal server using the Ektron CMS300 SharePoint integration .exe, perform the following steps:

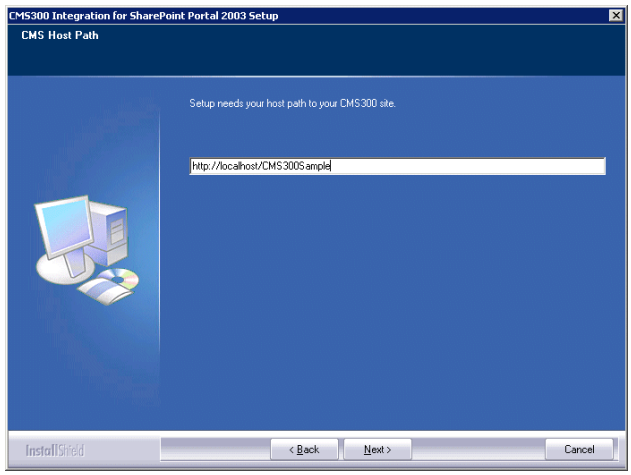
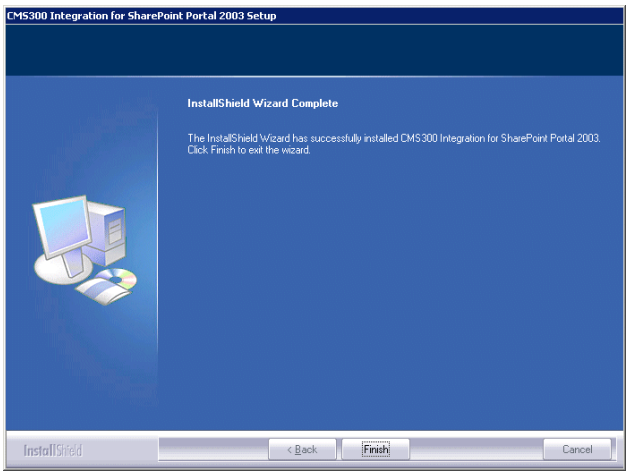
1. Begin by moving the installation file, SharePointForCMS.exe, to your SharePoint Portal Server.
2. Begin the installation by double-clicking on the .exe.

   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.

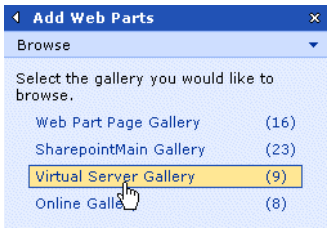
Setup Screen	Action
	4. Specify the location on your SharePoint server where you would like to install the Ektron CMS300 Web Part CAB files Click **Browse** (Browse...) to specify a directory other than the default. 5. Click **Next** (Next >) to proceed. The SharePoint Portal Site Location screen is 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 CMS300 Web site's root directory. i.e. 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 CMS300 integration files and settings are installed and configured on your SharePoint Portal Server.

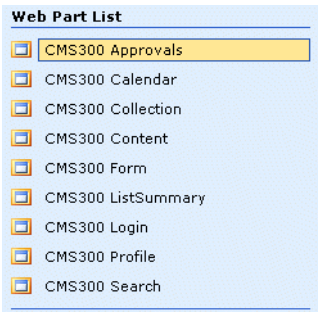
Testing the Installation

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 CMS300 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 CMS300 Web parts into your portal pages.

See ”Microsoft SharePoint Portal Server Overview...” on page 11 for information about beginning to work with the Ektron CMS300 Web parts.

If the installation was not successful, see ”Installation Troubleshooting” on page 6 for information about how to remedy possible problems.

Installation Troubleshooting

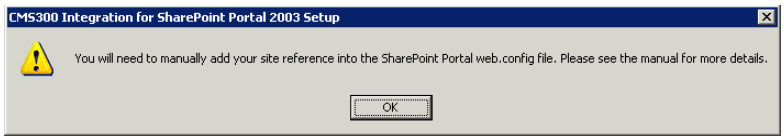
During the installation, you may receive messages indicating that the information that you have entered is not correct. If you decide

to continue the installation process with incorrect data, it might be necessary for you to register the Ektron CMS300 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.

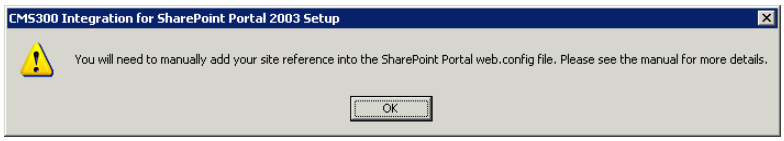


When the installation is complete, you must update your Web.config file manually (or perform the installation program again using the correct path).

See ”Updating Web.config Manually” on page 8 for more information.

Incorrect Ektron CMS300 Host Path

If an incorrect Ektron CMS300 Host Path is given during the installation, the following message is displayed.



When the installation is complete, you must update your Web.config must be updated manually (or perform the installation program again using the correct path).

See ”Updating Web.config Manually” on page 8 for more information.

Updating Web.config Manually

Your SharePoint Portal Server Web.config must contain all the necessary Ektron CMS300 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 CMS300 Web parts as safe controls
- Ektron CMS300 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.

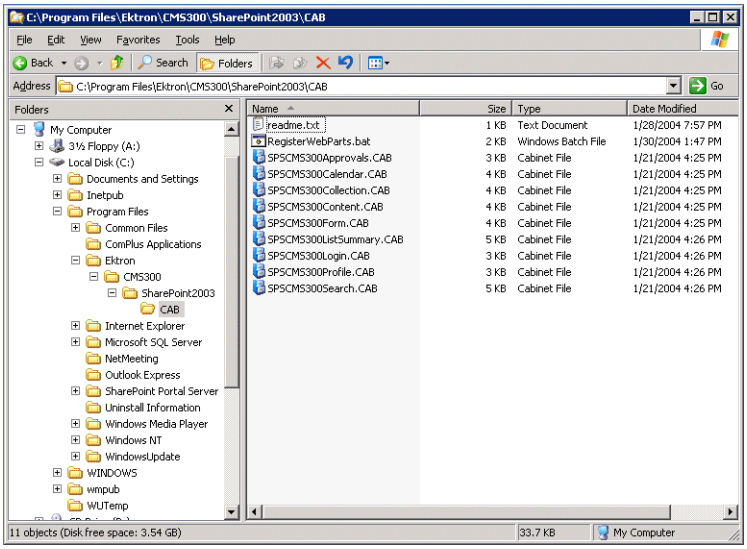
Registering Ektron CMS300 Web Parts as Safe Controls

In order for SharePoint to use the Ektron CMS300 Web parts, they must be registered by SharePoint as safe controls.

To register the Ektron CMS300 Web parts as safe controls manually, perform the following steps:

1. Begin by completing the Ektron CMS300 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 CMS300 Web parts.

NOTE If you are receiving errors when running the .bat file, edit the file and make sure that the correct location to **stsadm.exe** is referenced.

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 CMS300 Web parts are now successfully registered, and your Web.config is updated with the Web parts registered as safe controls.

Specifying Your Ektron CMS300 Site Path Manually

The Web.config file must contain a reference to your Ektron CMS300 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 CMS300 site path.

To update your Web.config file with the correct Ektron CMS300 site path, perform the following steps.

1. Open your SharePoint Portal Server's Web.config for editing with an 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 CMS300 Web server that contains the Ektron CMS300 display files for SharePoint.

   i.e. **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.

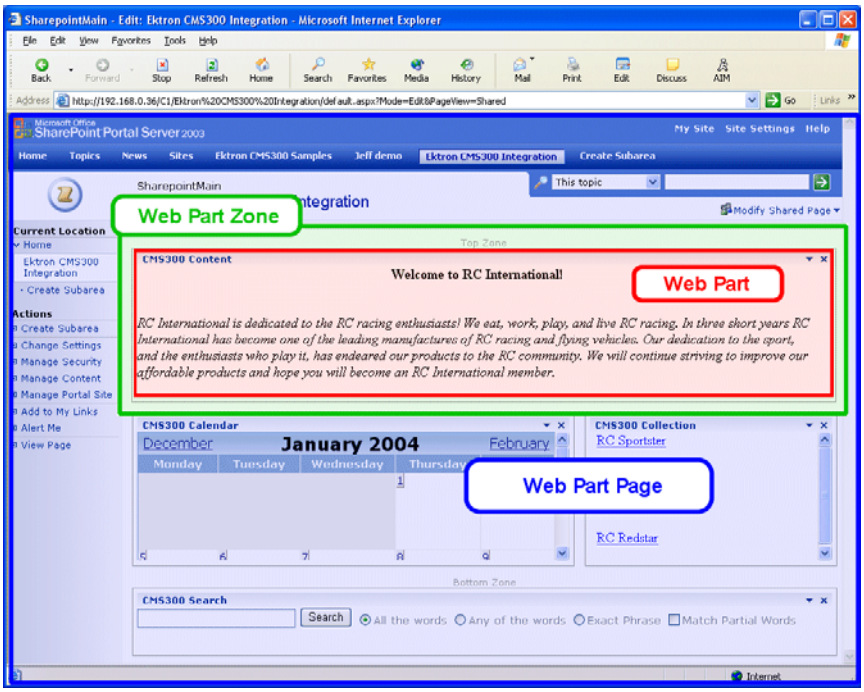
The portal facilitates end-to-end collaboration by enabling aggregation, organization, and search capabilities for people, teams, and information. Users can find relevant information quickly through customization and personalization of portal content and layout, as well as by audience targeting. Organizations 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 CMS300 display function, as well as Web parts for other useful Ektron CMS300 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 permission.
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 CMS300 Web parts are shared Web parts that can be personalized by different users (assuming they have the necessary permissions).

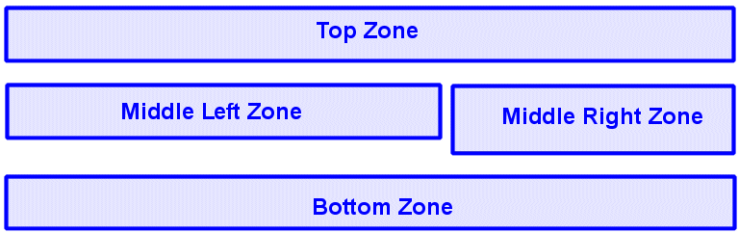
Web Part “Zones”

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.



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 CMS300 Web parts.

These permissions configured on the SharePoint server by the *SharePoint Portal Server* administrator, not the Ektron CMS300 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.

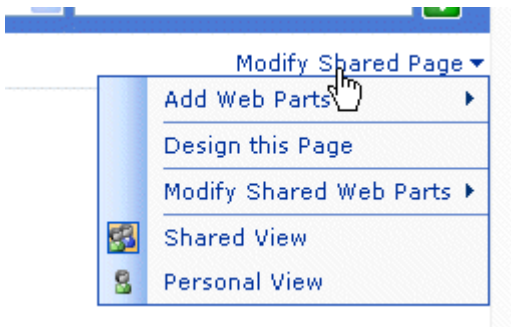
Web Page View	Description
Shared	A view of a list, document library, or Web Part Page that every user with the appropriate permissions on a site can see. The shared view of a Web Part Page uses shared property values. Changes made to a shared view apply to the list, library, or page as it appears to all users. shared Web Part
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 inserted 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)



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.

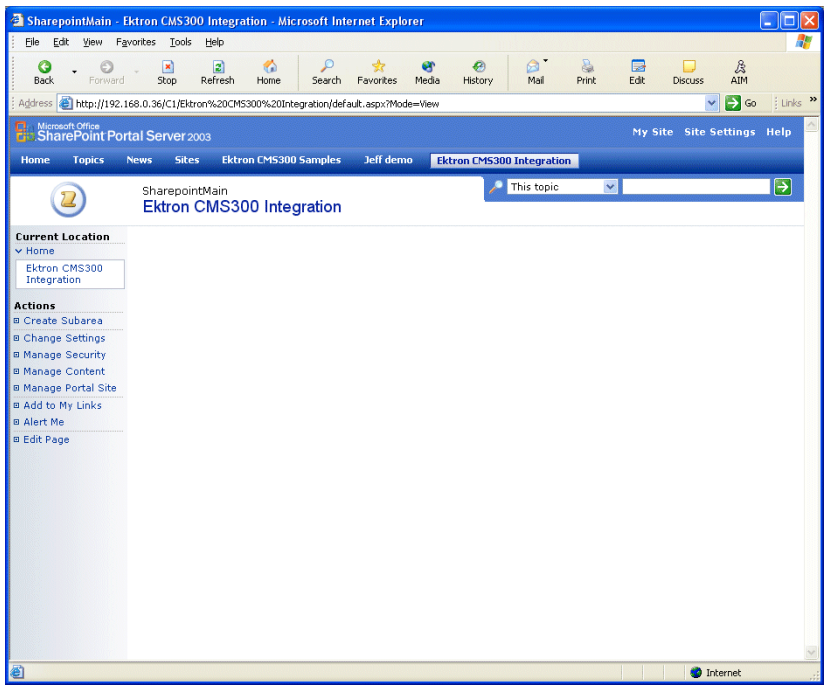
Ektron CMS300 Web Parts

When configured properly, all Ektron CMS300 Web parts are available to be inserted by browsing to the SharePoint Portal **Virtual Server Gallery**.

Inserting Ektron CMS300 Web Parts

The following section explains the basics behind inserting Ektron CMS300 Web parts.

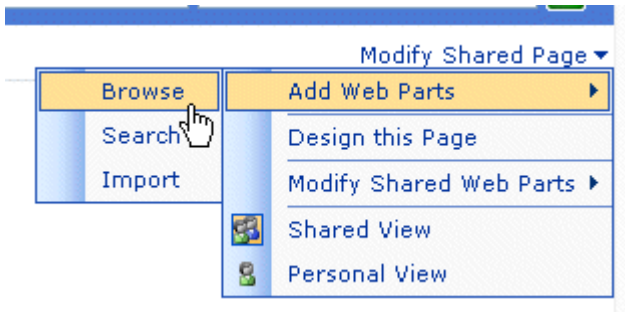
1. Begin by logging into your SharePoint Portal Server.
2. **Create** or **navigate** to the area that contains the Web part zones where you want to insert an Ektron CMS300 Web part to.



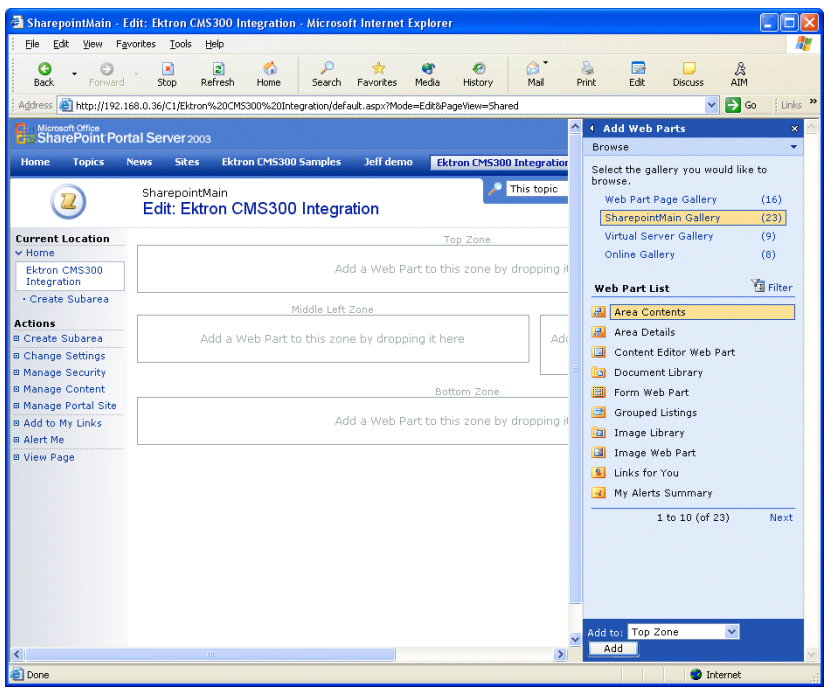
3. Click on **Edit Page** at the bottom of the left navigation menu.

You are now in **Edit Page Mode**.

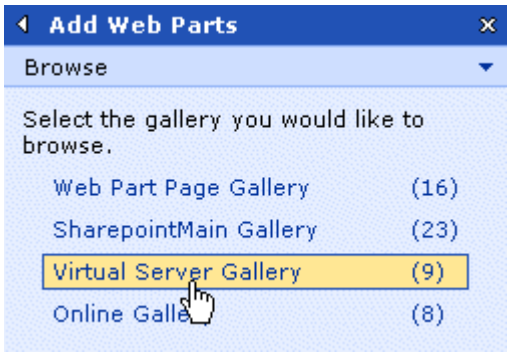
4. Click on **Modify Shared Page**, **Add Web Parts**, then **Browse**



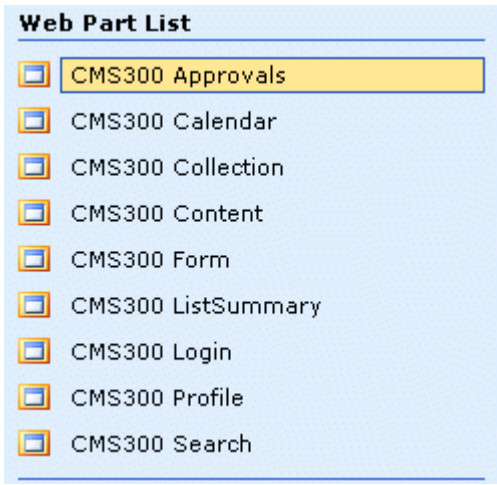
The Web part zones are displayed, and the Add Web Parts menu appears on the right side of the screen.



5. Click on **Virtual Server Gallery**

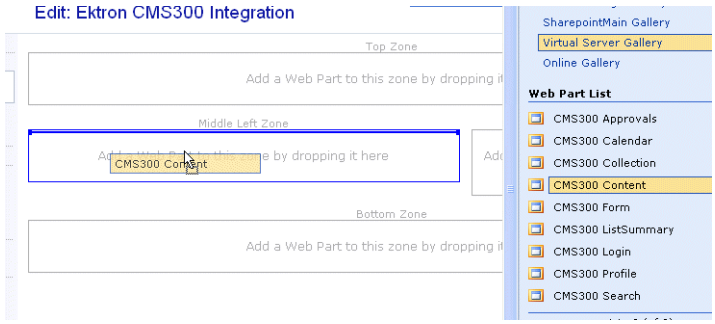
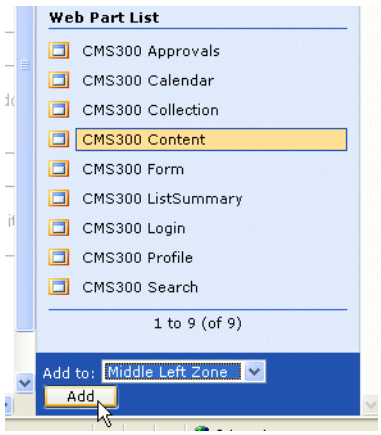


A list of all Web parts that have been added to the Virtual Server Gallery, including the Ektron CMS300 Web parts, are displayed at the bottom of the page

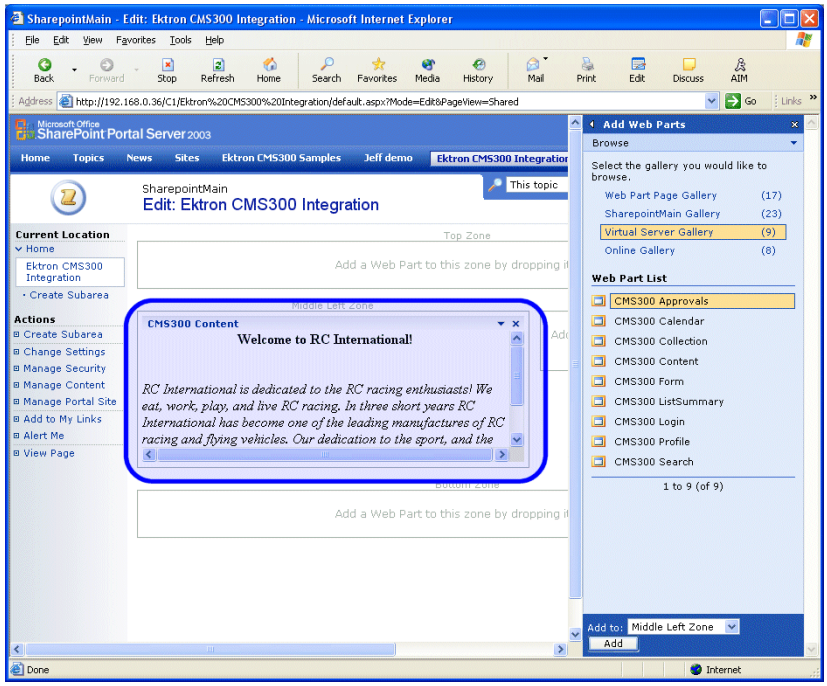


NOTE For information about each of the available Ektron CMS300 Web parts, see "Managing Ektron CMS300 Web Parts" on page 24.

6. Insert an Ektron CMS300 Web part one of two ways:

Method	Screenshot
• Dragging and dropping the Web part to the desired zone	
• 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.

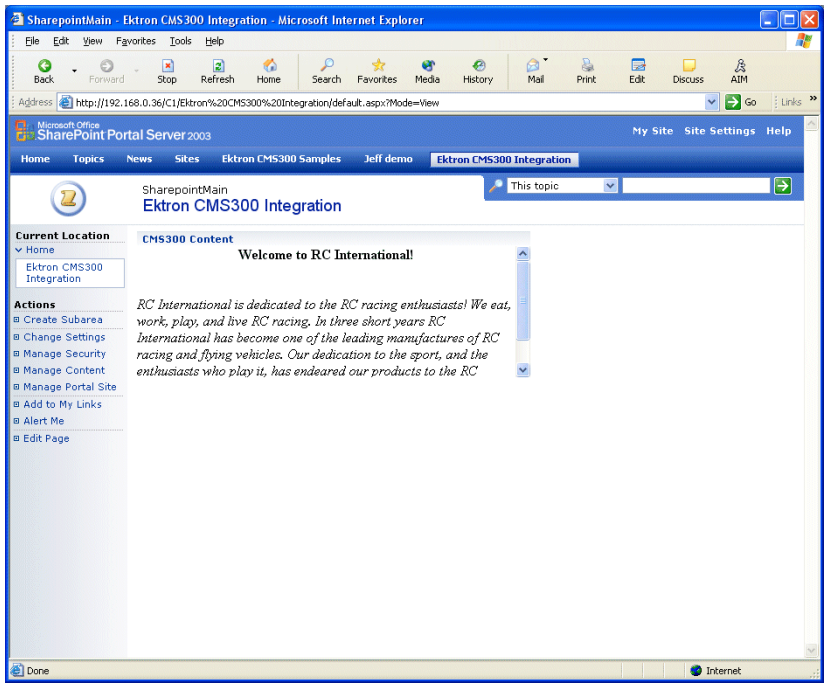
NOTE Refer to your Microsoft SharePoint documentation for additional information about configuring these properties.

In addition to the standard properties, some Ektron CMS300 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 CMS300 Web part.



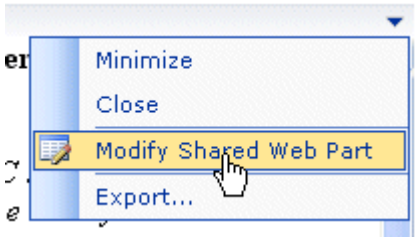
3. Click on **Edit Page** at the bottom of the left navigation menu.

You are now in **Edit Page Mode**.

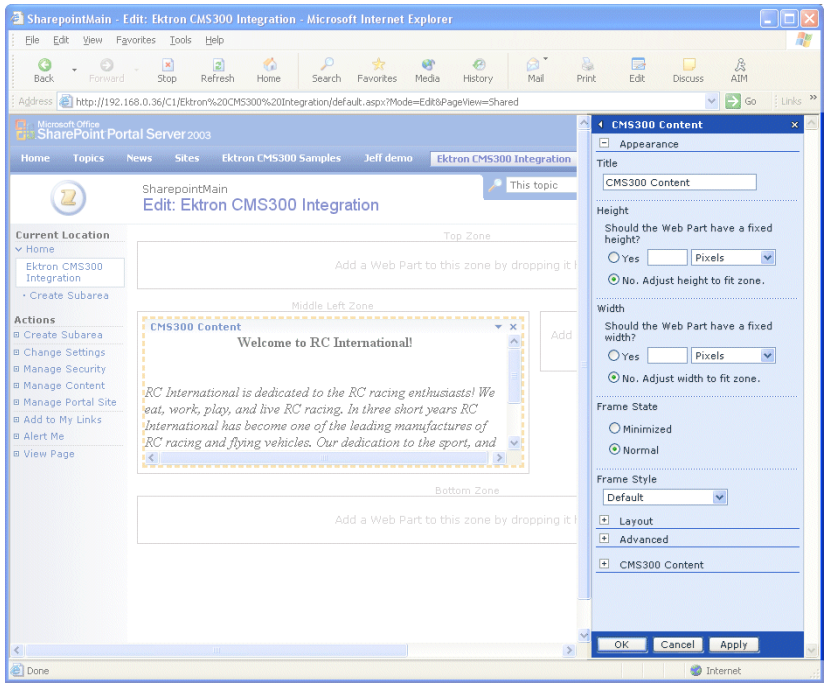
4. Click on the down arrow ( ) at the top right corner of the Web part you wish to modify.

   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.

NOTE Information about modifying specific Ektron CMS300 Web parts can be found in "Managing Ektron CMS300 Web Parts" on page 24.

7. Click **Apply** (Apply) for the changes to take effect without closing the menu, or click **OK** (OK) so save and close the menu.

Managing Ektron CMS300 Web Parts

Ektron has created Web parts for all display functions in Ektron CMS300, as well as two others.

The following table lists each Web part, and its functionality.

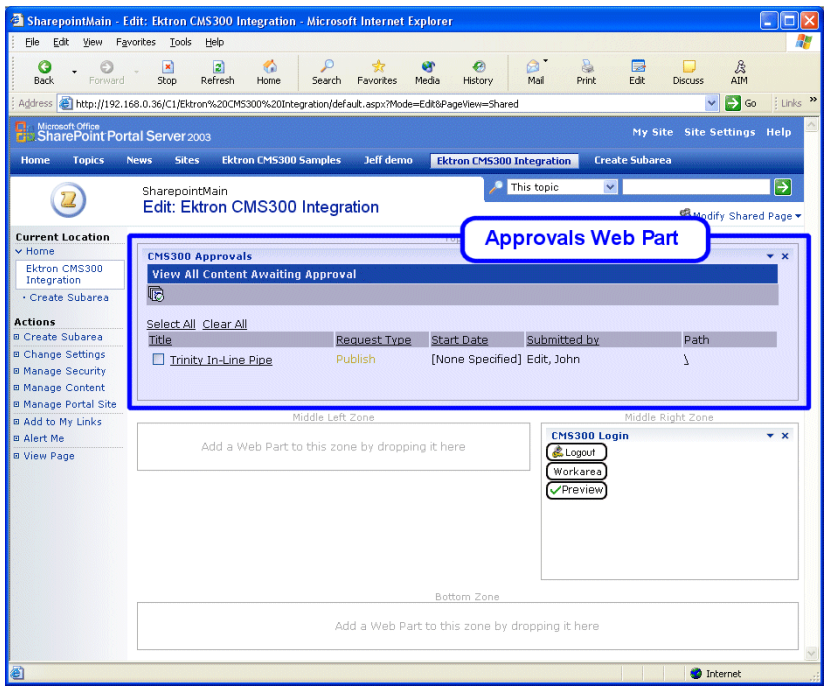
Web Part	Description	More Information
Approvals	Displays a list of content blocks awaiting approval by the logged in Ektron CMS300 user.	”Approvals Web Part” on page 24
Calendar	Displays a calender created for the Ektron CMS300 Web site.	”Calendar Web Part” on page 25
Collection	Displays a collection, as well as its display function, for a collection created in the Ektron CMS300 Web site.	”Collection Web Part” on page 28
Content	Displays a content block created for the Ektron CMS300 Web site.	”Content Web Part” on page 33
Form	DIsplays a form content block created in the Ektron CMS300 Web site.	”Form Content Block Web Part” on page 36
Summary List	Displays a summary list for a specified content folder in the Ektron CMS300 Web site.	”Summary List Web Part” on page 40
Login	Displays a login button which allows users to log in, and be authorized, by the Ektron CMS300 Web site enabling them	”Login Web Part” on page 47
Profile	Displays configurable profile settings for the logged in Ektron CMS300 user.	”Profile Web Part” on page 50
Search	Displays Ektron CMS300 Web site search box and search results	”Search Web Part” on page 53

Approvals Web Part

When logged into Ektron CMS300 via Microsoft SharePoint Portal Server, the approvals Web page displays a list of the current content blocks awaiting your approval.

NOTE As stated, you must be logged into the Ektron CMS300 site via SharePoint server in order to view your approvals list. See "Login Web Part" on page 47 for additional information.

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 CMS300 Workarea.

Approvals Web Part Settings

The approvals web part does not include any additional settings.

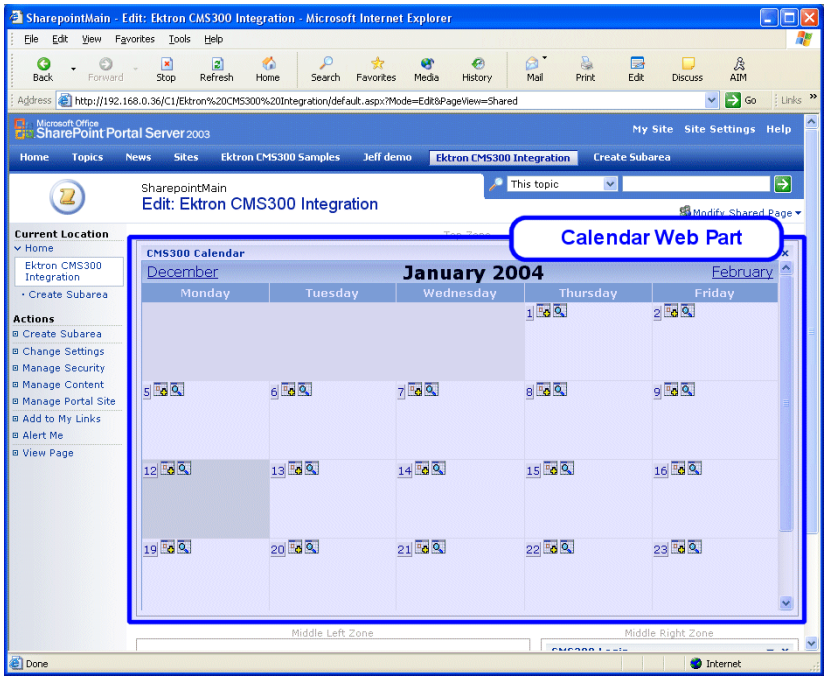
Approving Content via SharePoint

When viewing your approvals, you can approve any content block awaiting your approval by performing the same steps you would in your Ektron CMS300 Web site.

Calendar Web Part

The calendar web part displays an event calendar created within the Ektron CMS300 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 CMS300 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).

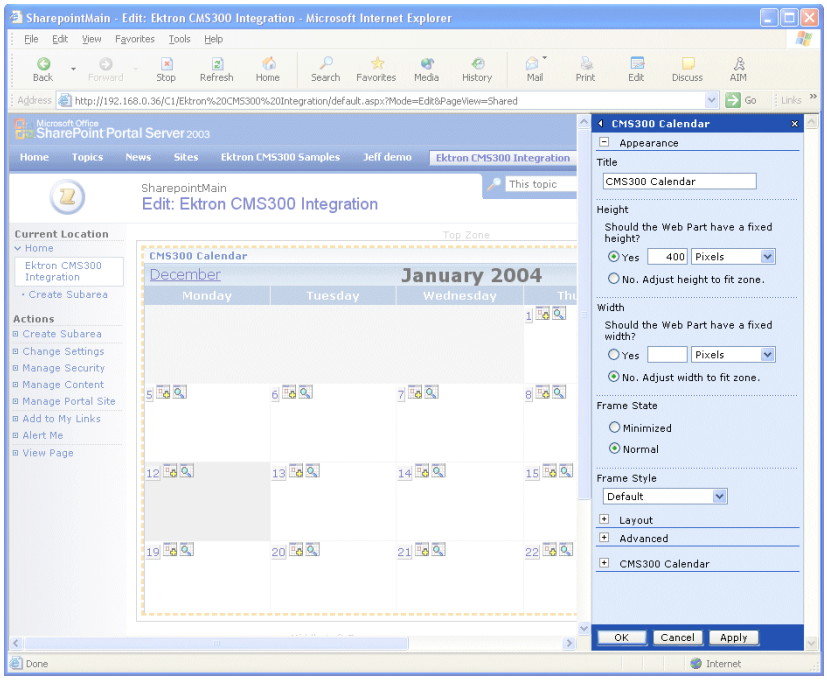
NOTE See "Login Web Part" on page 47 for information about adding a login Web part and logging into the Ektron CMS300 web site via SharePoint Server.

Calendar Web Part Settings

The calendar Web part can be configured to display any event calendar from your Ektron CMS300 Web site.

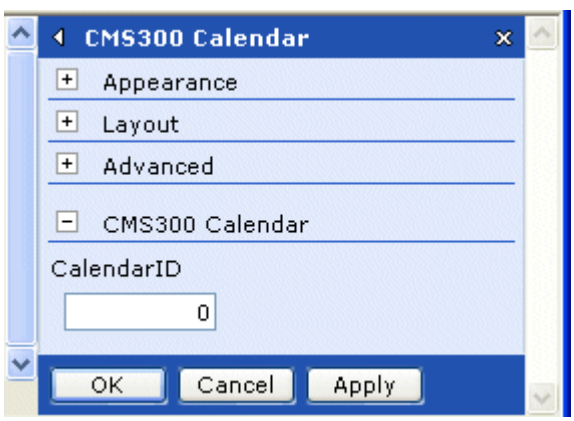
To configure the calendar Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the calendar Web part as described in "Modifying Web Parts" on page 20.

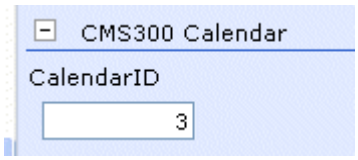


2. Minimize the **Appearance Settings**, and expand the **CMS300 Calendar settings**

   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 **Apply** (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 **OK** (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 CMS300 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:

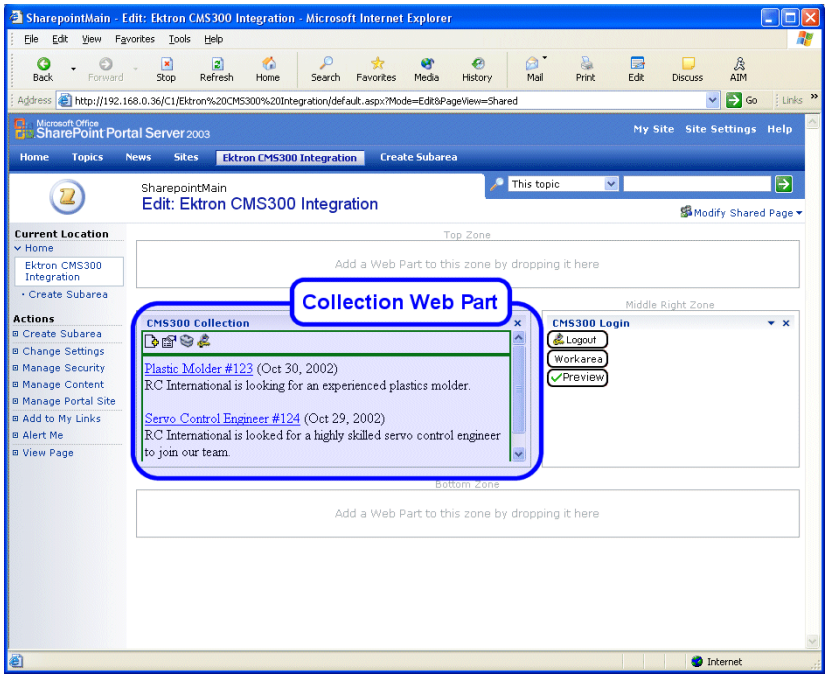
- Adding new event calendars
- Editing and deleting existing event calendars
- Adding new calendar events
- Editing, viewing, and deleting existing calendar events

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 CMS300 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 CMS300 Web site via SharePoint, you may also perform all related tasks to the collections (see

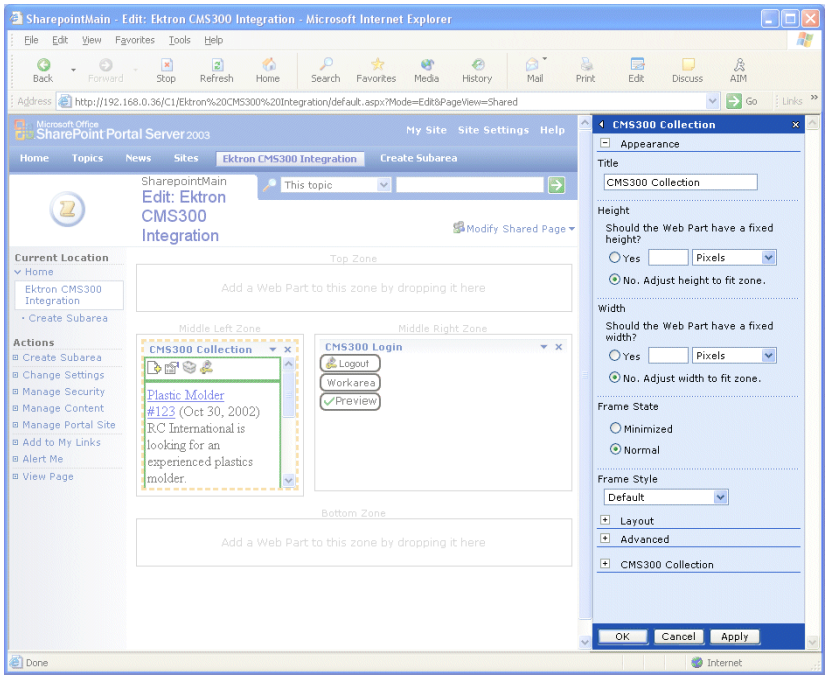
NOTE See ”Login Web Part” on page 47 for information about adding a login Web part and logging into the Ektron CMS300 web site via SharePoint Server.

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.

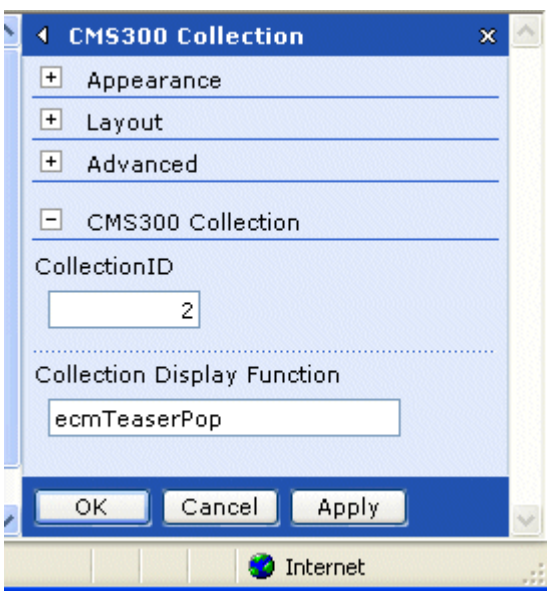
To configure the collection Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the collection Web part as described in "Modifying Web Parts" on page 20.



2. Minimize the **Appearance Settings**, and expand the **CMS300 Content settings**

   The collection Web Part settings information is displayed.

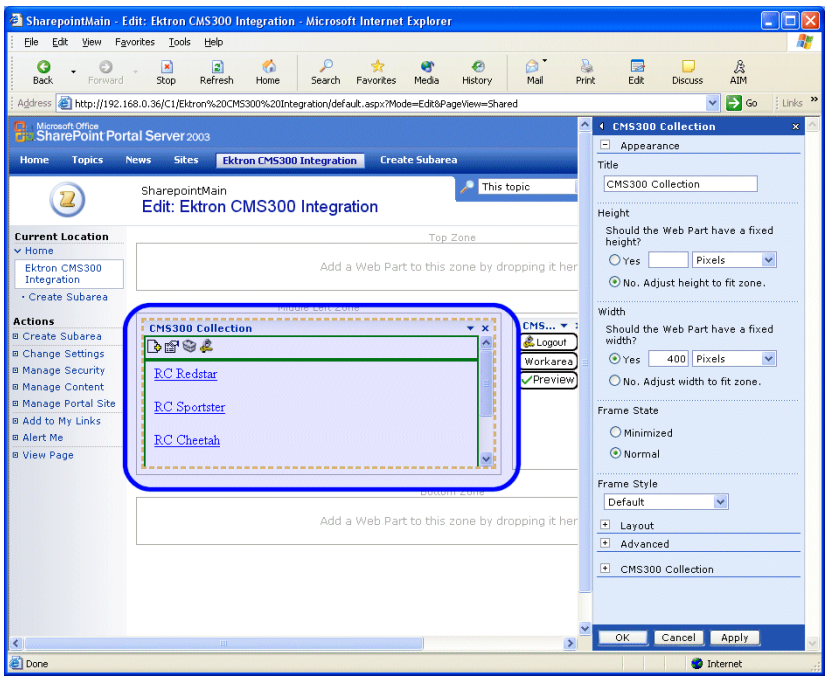


The following table explains the configurable fields for the collection Web part.

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 CMS300 Web site developer for a list of available display functions.

3. Make the necessary changes to the available fields using the previous table as a reference.
4. Click **Apply** (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 **OK** (OK) to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS300 Content

As stated earlier, when logged into the Ektron CMS300 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 CMS300 Web site collection within SharePoint, perform the following steps:

1. Login to the Ektron CMS300 Web site via the Login Web Part (see ”Login Web Part” on page 47 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.

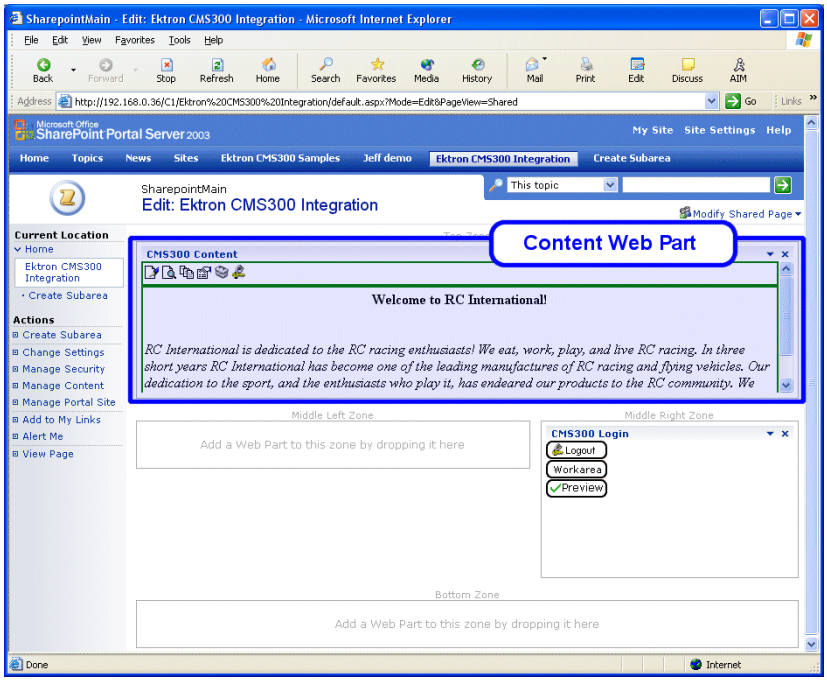
3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS300 workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS300 collections.

Content Web Part

The content web part is used to display any content block created in the Ektron CMS300 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 CMS300 Web site via SharePoint server, you may also manage the content (see "Managing Ektron CMS300 Content" on page 35 for more information).

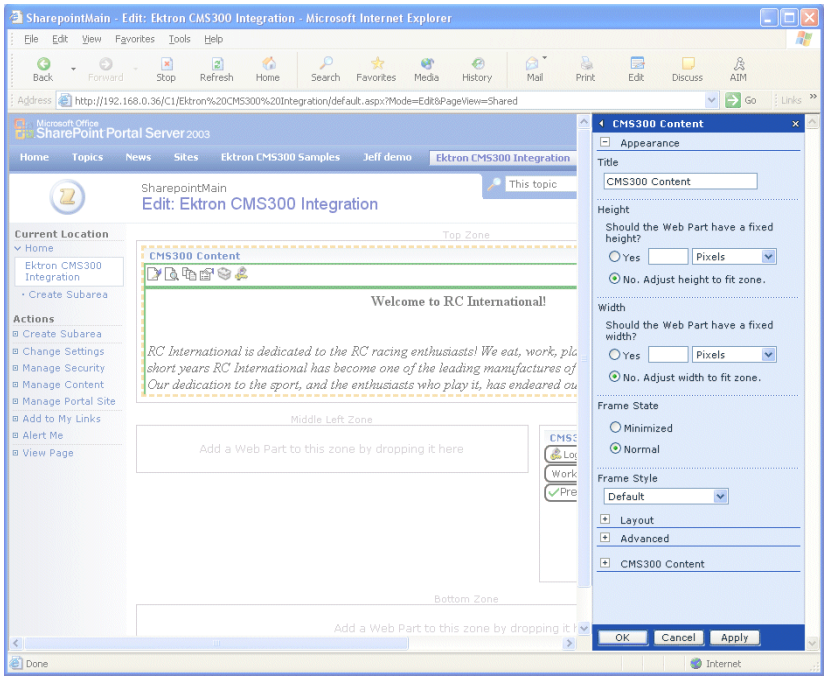
NOTE See "Login Web Part" on page 47 for information about adding a login Web part and logging into the Ektron CMS300 web site via SharePoint Server.

Content Web Part Settings

The content Web part can be configured to display any content block from your Ektron CMS300 Web site.

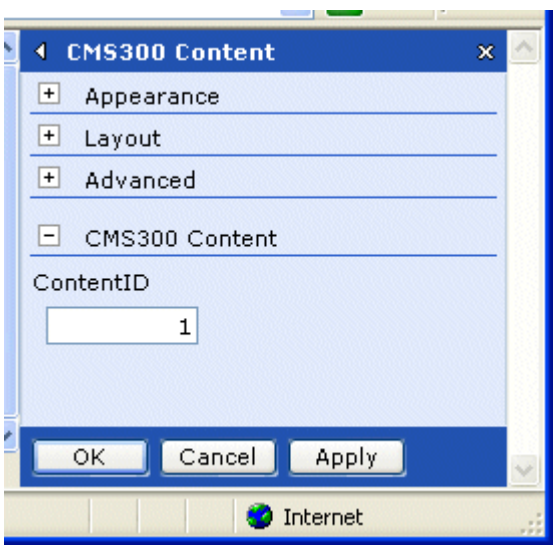
To configure the content Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the content Web part as described in "Modifying Web Parts" on page 20.

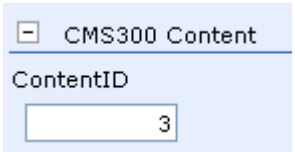


2. Minimize the **Appearance Settings**, and expand the **CMS300 Content settings**

   The Content Web Part settings page is displayed.

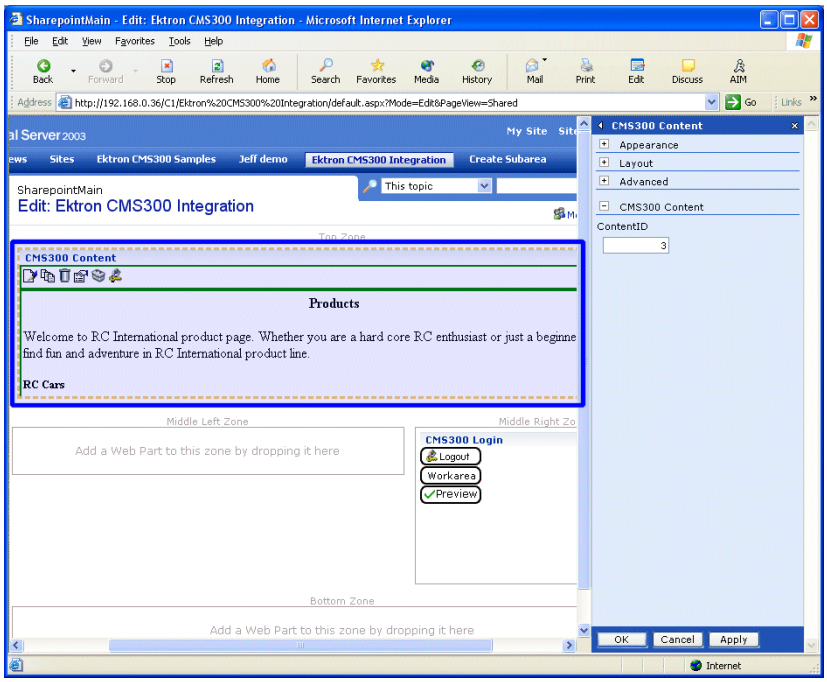


3. Change the value in the **ContentID** field to the ID number of the content block you wish to be displayed.



4. Click **Apply** (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 CMS300 Content

As stated earlier, when logged into the Ektron CMS300 Web site via SharePoint, you may manage content displayed by the content Web part (assuming you have permissions to do so within the Ektron CMS300 **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 CMS300 Web site content within SharePoint, perform the following steps:

1. Login to the Ektron CMS300 Web site via the Login Web Part (see "Login Web Part" on page 47 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.

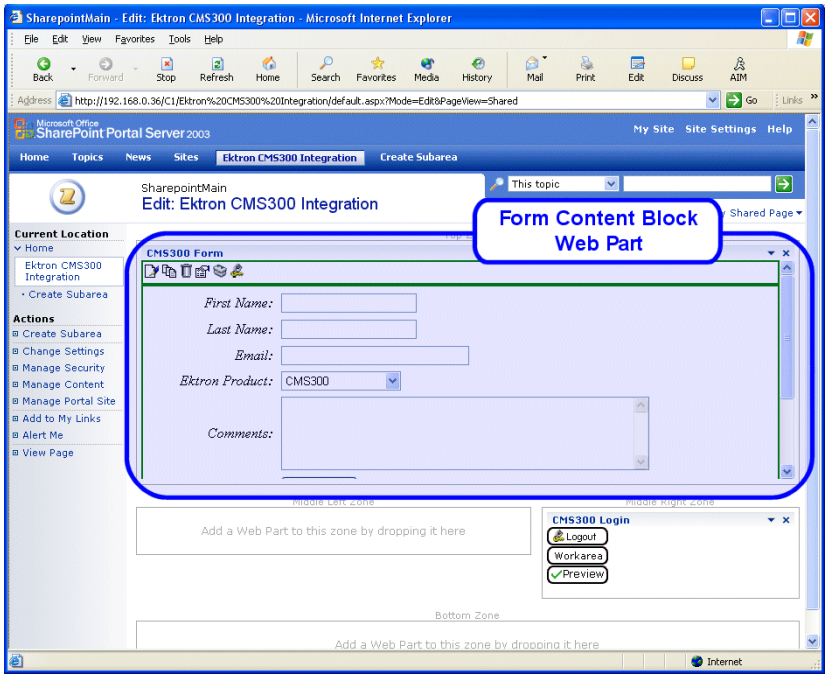
3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS300 workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS300 content.

Form Content Block Web Part

A form content block Web part is used to display an Ektron CMS300 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 CMS300 Web site via SharePoint server, you may also manage the form content (see "Managing Ektron CMS300 Form Content" on page 39 for more information).

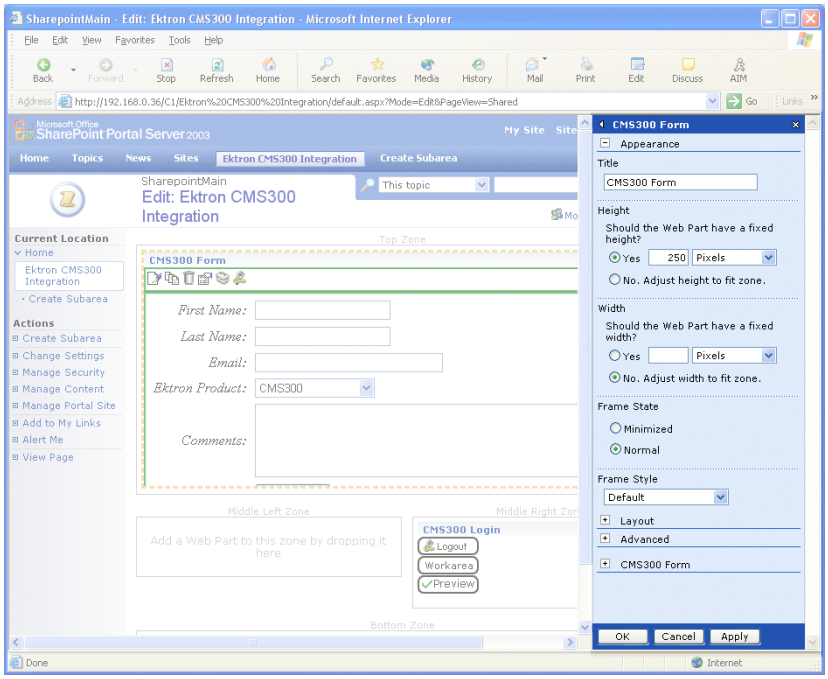
NOTE See "Login Web Part" on page 47 for information about adding a login Web part and logging into the Ektron CMS300 web site via SharePoint Server.

Form Content Web Part Settings

The form content Web part can be configured to display any form content block from your Ektron CMS300 Web site.

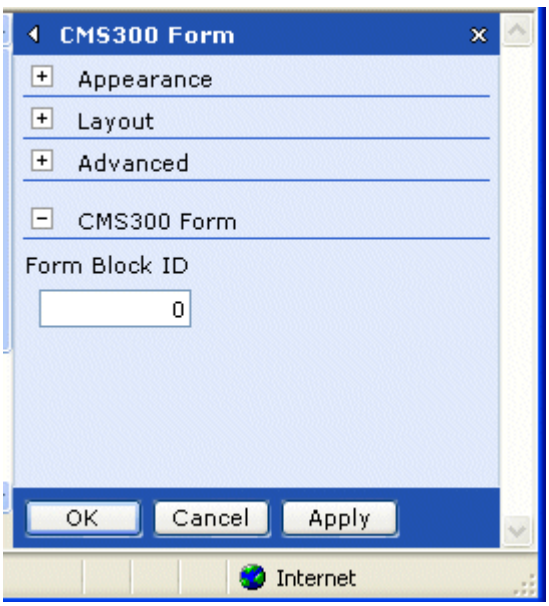
To configure the form content Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the form content Web part as described in ”Modifying Web Parts” on page 20.



2. Minimize the **Appearance Settings**, and expand the **CMS300 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 **Apply** (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 **OK** (OK) to close the Modify Web Part area.

   Clicking **OK** returns you to the Edit Page view.

Managing Ektron CMS300 Form Content

As stated earlier, when logged into the Ektron CMS300 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 CMS300 **Web site**).

Some form content related tasks that you may perform include, but not restricted to:

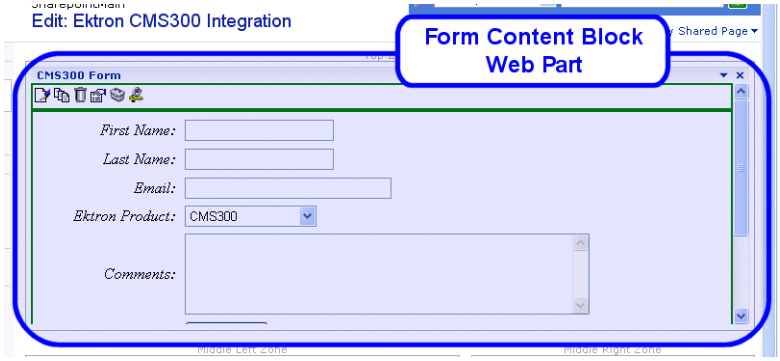
- Editing form content
- Modifying form processing information
- Creating new form content

To manage the Ektron CMS300 Web site form content within SharePoint, perform the following steps:

1. Login to the Ektron CMS300 Web site via the Login Web Part (see ”Login Web Part” on page 47 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.

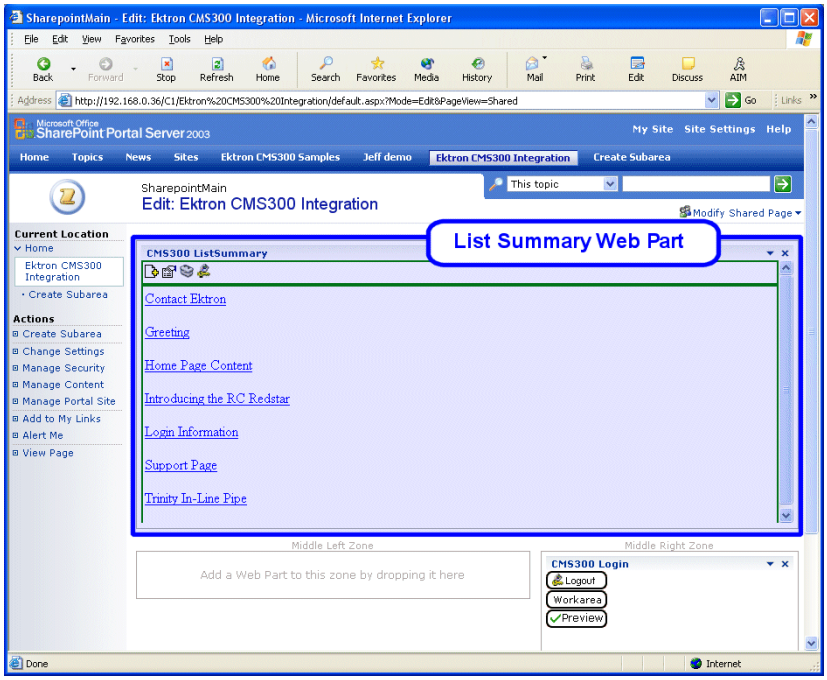


3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS300 workarea.

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 CMS300 content folder.

DIsplayed here is an example of a summary list web part being displayed in the SharePoint Portal Server.



Similar to other Ektron CMS300 Web parts, if you are logged into the Ektron CMS300 Web site via SharePoint Server, you can also manage the summary list (see ”Managing the Summary List” on page 46 for more information).

NOTE See ”Login Web Part” on page 47 for information about adding a login Web part and logging into the Ektron CMS300 web site via SharePoint Server.

List Summary Web Part Settings

The list summary Web part can be configured to fully customize the summary list.

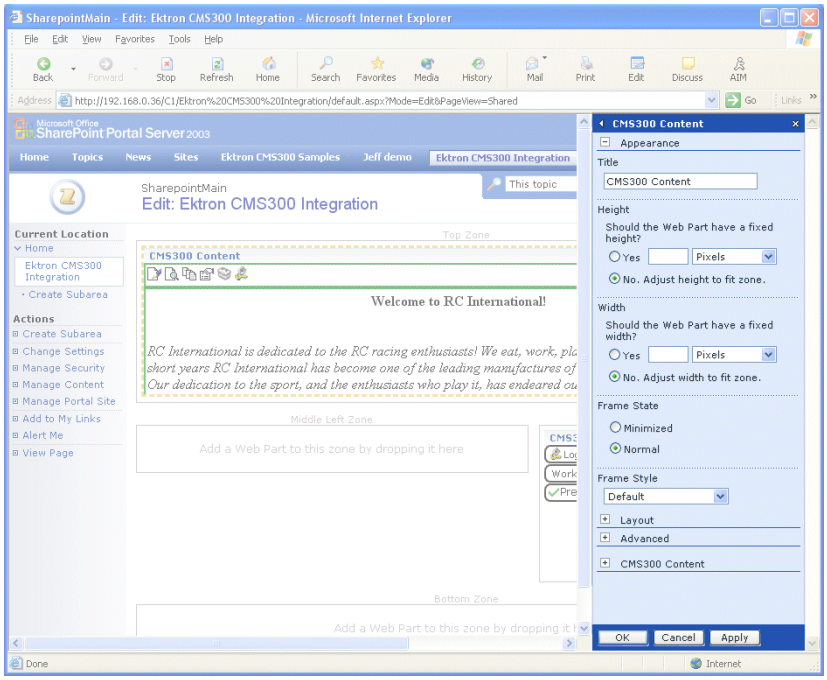
Several options are configurable including:

- Starting folder
- Style information
- Maximum amount to display

As well as several other options.

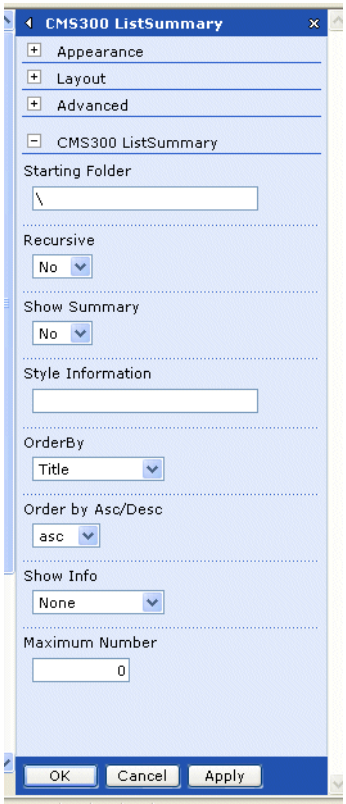
To configure the list summary Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the content Web part as described in "Modifying Web Parts" on page 20.



2. Minimize the **Appearance Settings**, and expand the **CMS300 ListSummary settings**

The List Summary Web Part settings page is displayed.



The following table explains each of the configurable fields for the List Summary Web part.

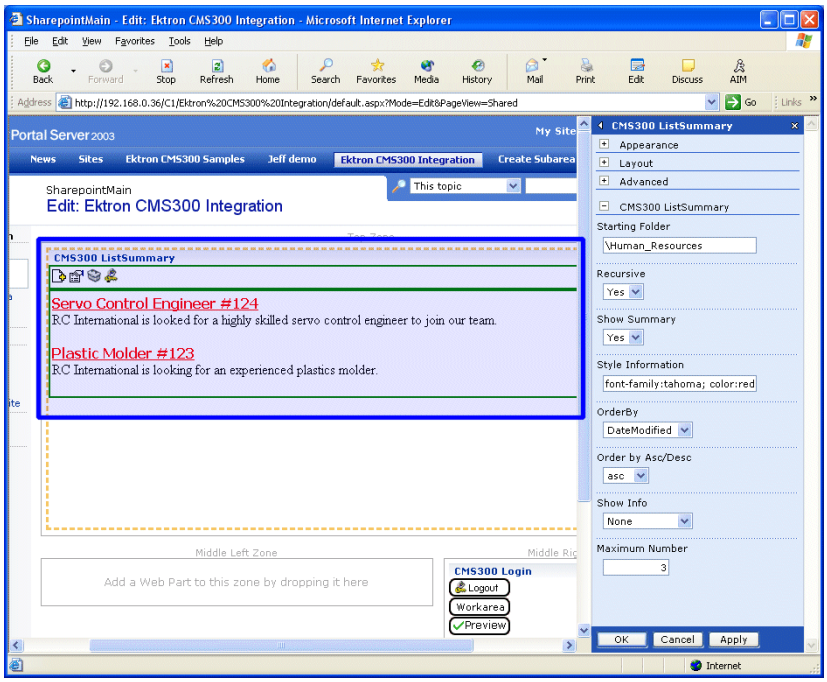
Field	Description	Default
Starting Folder	Ektron CMS300 content folder where the summary list begins to retrieve summary information from. Examples: "**\Products\RC Cars**" or "****" (root content folder)	\
Recursive	Used to specify whether the summary list will contain summary information from the starting folder's sub-folders. • **No** - *summary list is not recursive* • **Yes** - *summary list is recursive*	No

Field	Description	Default
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
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)

3. Make the necessary changes to the List Summary settings using the previous table as a guide.

4. Click **Apply** (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 **OK** (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 CMS300 Web site via SharePoint, you may manage the summary list displayed by the list summary Web part.

To manage the Ektron CMS300 summary list within SharePoint, perform the following steps:

1. Login to the Ektron CMS300 Web site via the Login Web Part (see ”Login Web Part” on page 47 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.

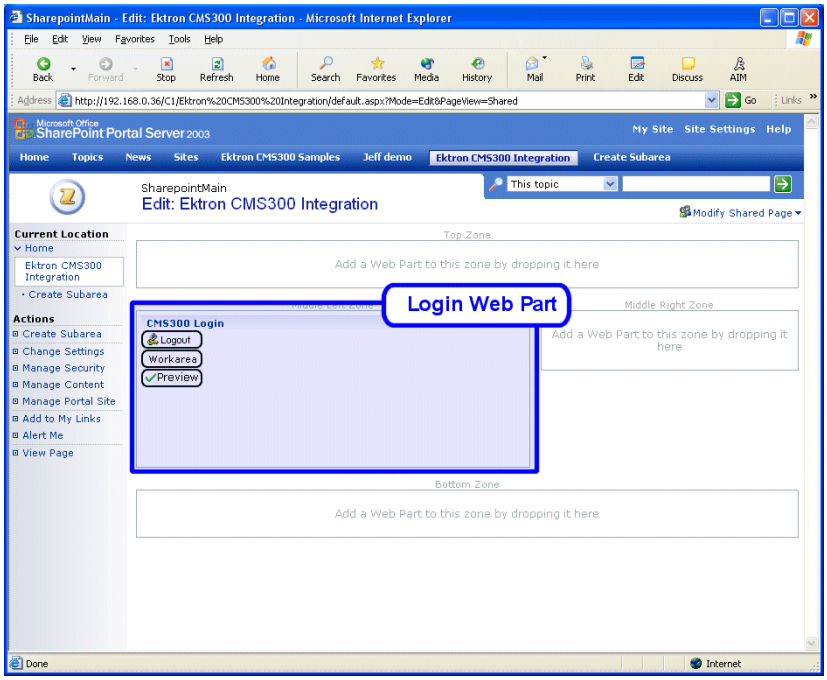
2. The summary list displayed by the summary list Web part is surrounded by a colored border.

3. Perform tasks by using the icon menu, or by clicking on the Workarea button to access your Ektron CMS300 workarea.

Login Web Part

The login web part is used to display a login button that allows users to login to the Ektron CMS300 Web site via SharePoint, and be authorized to work with Ektron CMS300 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

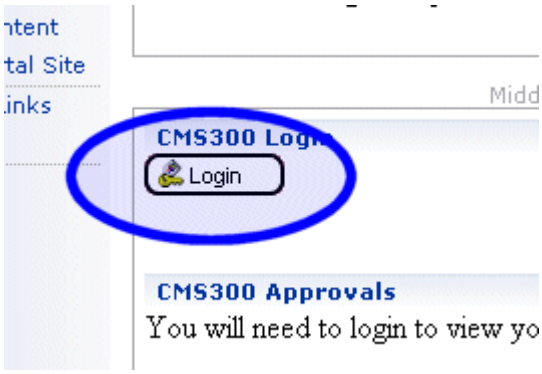
The login web part does not include any configurable settings.

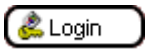
Logging Into a Ektron CMS300 Web Site Via SharePoint Server

As stated several times, you can log into your Ektron CMS300 Web site via SharePoint Portal Server, and be authorized to manage content, as well as any other task.

To log into your Ektron CMS300 Web site via SharePoint Portal Server, perform the following steps:

1. Navigate to the SharePoint Zone that contains the Ektron CMS300 Login Web part.



2. Click **Login** (

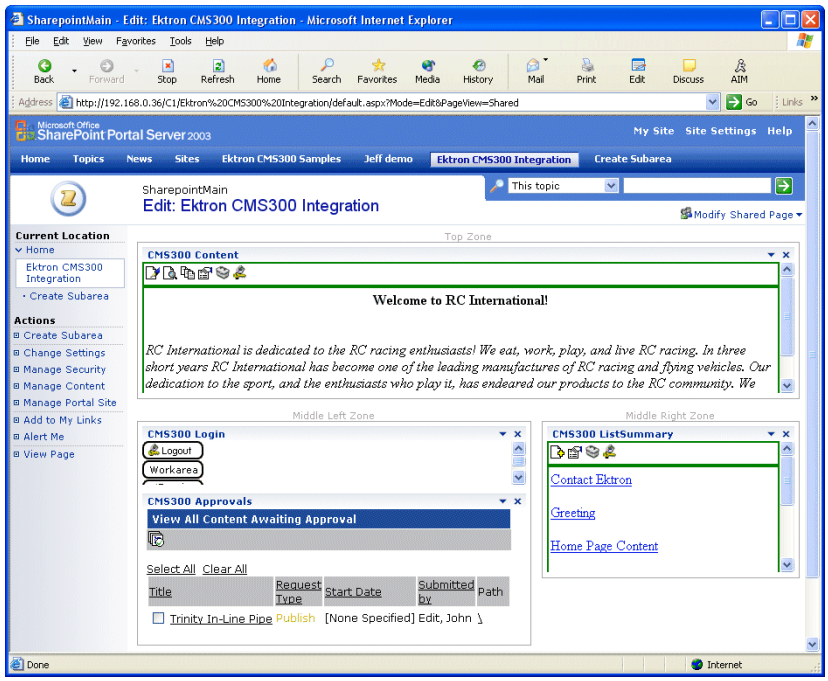
).

   The Ektron CMS300 Login box is displayed.

3. Enter a valid Ektron CMS300 username and password in the respective fields.

4. Click **Login** (LOGIN).

   The username and password is sent to the Ektron CMS300 server, and upon successful authorization, you will be logged into Ektron CMS300.



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.

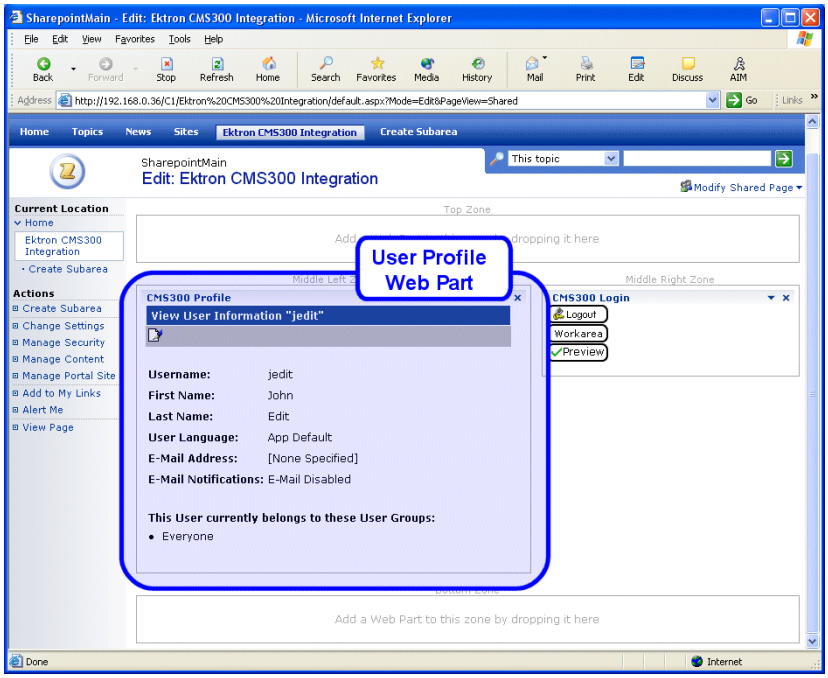
Profile Web Part

Every user that belongs to an Ektron CMS300 Web site has access to their user profile which allows them to view and modify information about themselves.

When logged into Ektron CMS300 via SharePoint, each user can access this profile information.

NOTE As stated, you must be logged into the Ektron CMS300 site via SharePoint server in order to view your approvals list. See ”Login Web Part” on page 47 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 CMS300 user profile information (see ”Editing Profile Information” on page 51 for additional information).

Profile Web Part Settings

The profile web part does not include any configurable settings.

Editing Profile Information

All Ektron CMS300 users can update their profile information directly from SharePoint.

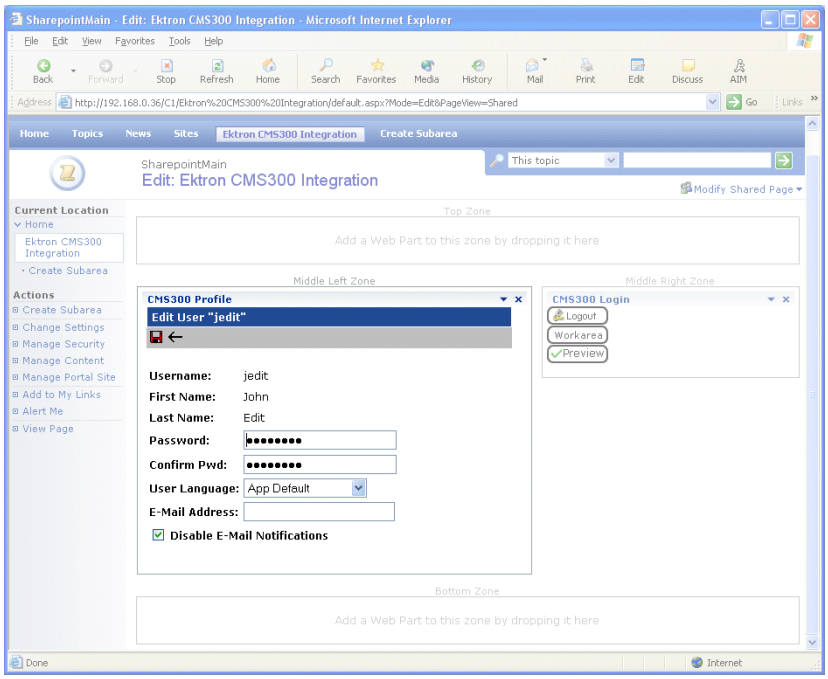
To update Ektron CMS300 profile information, perform the following steps:

NOTE Before you can update profile information, you must first be logged into your Ektron CMS300 Web site via SharePoint. See ”Logging Into a Ektron CMS300 Web Site Via SharePoint Server” on page 48 for more information.

1. Access the SharePoint portal page that contains the Ektron CMS300 profile Web part.

2. Click **Edit** ( ) on Ektron CMS300 profile Web part menu.

   The Edit User Information page is displayed.



3. Make the necessary changes to your user information.

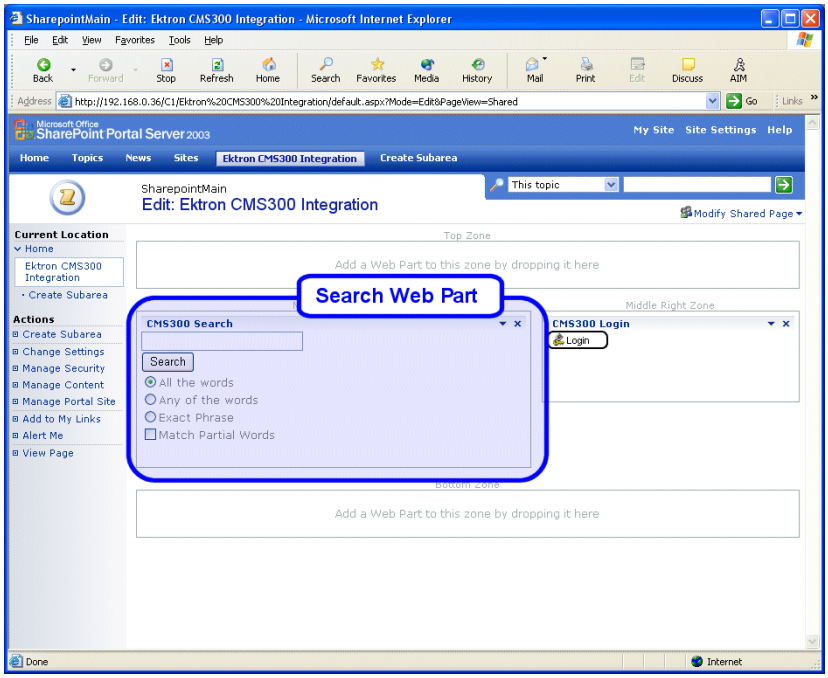
4. Click **Update** ( ) on Ektron CMS300 profile Web part menu to save the changes.

   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 CMS300 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 CMS300 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:

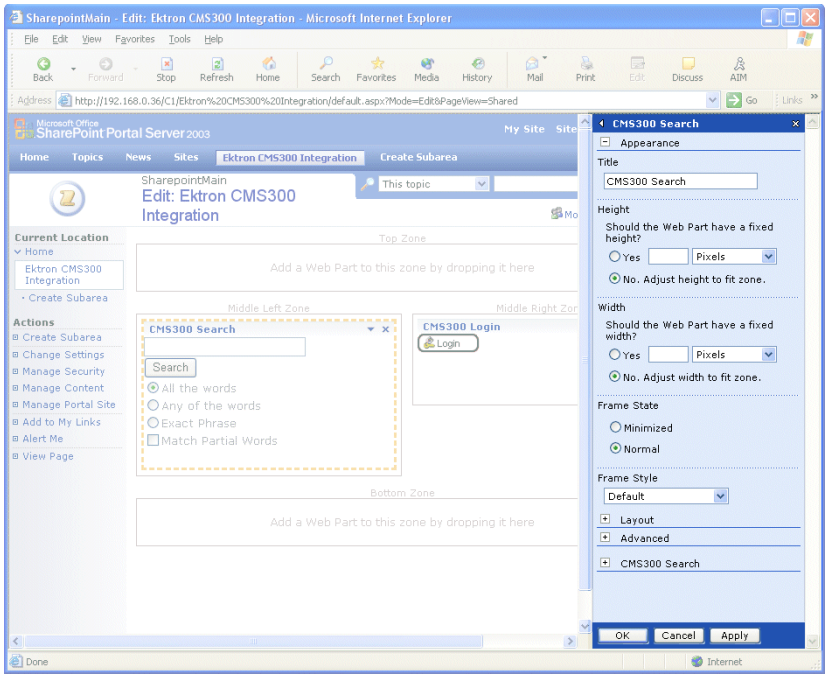
- Starting folder
- Recursive search

- Maximum amount of results to display

As well as several other options.

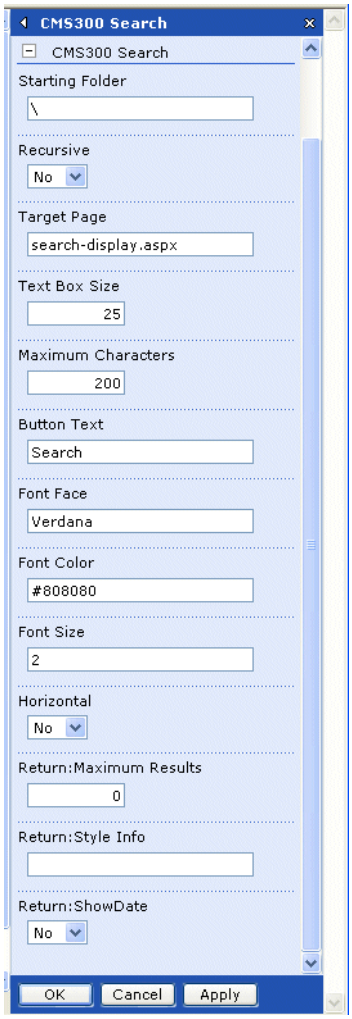
To configure the search Web part, perform the following steps:

1. Access the Modify Shared Web Part area for the content Web part as described in "Modifying Web Parts" on page 20.



2. Minimize the **Appearance Settings**, and expand the **CMS300 Search settings**

The search Web part information is displayed.



The following table explains each of the configurable fields for the search Web part.

Field	Description	Default
Starting Folder	Ektron CMS300 content folder where the search begins to retrieve results from. Examples: "**\Products\RC Cars**" or "****" (root content folder)	\

Field	Description	Default
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
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 CMS300 user.	No

3. Make the necessary changes to the search settings using the previous table as a guide.
4. Click **Apply** (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 **OK** (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 CMS300 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 CMS300 Web site that matched the criteria is displayed.

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS300 in the following manuals:

- *Ektron CMS300 Administrator Manual*
- *Ektron CMS300 Developer's Reference Manual*
- *Ektron CMS300 User Manual*
- *Ektron CMS300 Administrator Quick Start Manual*
- *Ektron CMS300 Setup Manual*

Support

If you are experiencing trouble with any aspect of Ektron CMS300, please contact the Ektron Support Team via their Web Site:

http://www.ektron.com/support/cms300_support.aspx

Sales

For questions and answers about purchasing Ektron CMS300 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:

info@ektron.com

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