

Ektron

# Ektron CMS200/300 Administrator Manual

Version 4.7, Revision 1

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Version 4.7, Revision 1, September 28, 2004

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LA10031, Revision 1.4

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# Author's Note

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

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

# 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.

# 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.

# 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.

# Sample Site Used in 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.

Νοτε

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.

# **Types of Users**

Ektron CMS200/300 lets you 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
Content Contributor	Maintains Web site by adding, modifying, and publishing content blocks.

You assign privileges to Ektron CMS200/300 users based on the actions for which they are responsible. Each user may be assigned

any or all types of privileges. Users without administrative permissions are known as content contributors.

This document, the Ektron CMS200/300 Administrator Manual, discusses all administrator actions. Detailed information about the editing and publishing features of Ektron CMS200/300 may be found in the Ektron CMS200/300 User Manual.

#### Administrators

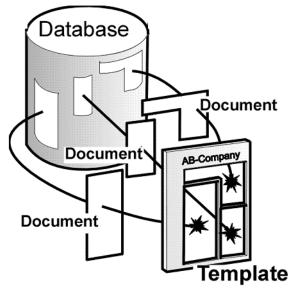
Ektron CMS200/300 administrators set up and organize the Web site before content contributors can log in. This document describes features and actions available to a user with administrative privileges.

## **Key Concepts**

The Ektron CMS200/300 product implements 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.

#### **Management of Content Blocks**

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 actions that are typically performed by people with different levels of responsibility. In some cases one or more people may perform these actions. 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.
- 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 toolbar button.
- 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 the edit toolbar button at the top of the content block.
- 4. Make your changes.
- 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.

### **Conventions of the Manual**

This document's typographic styles and conventions are explained 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.

Convention	Explanation
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.

# **Getting Started**

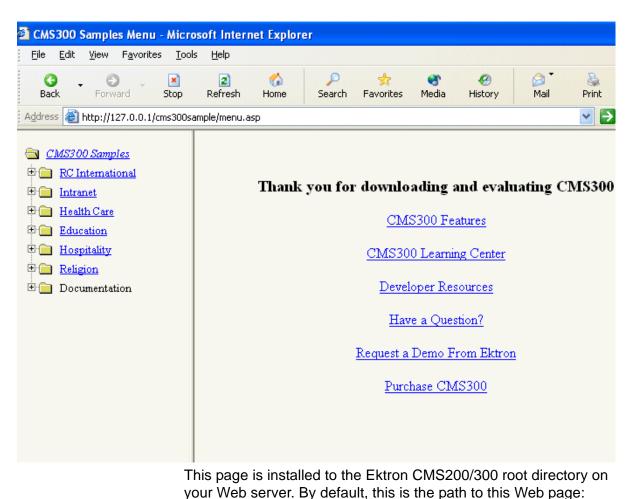
Now that you have installed Ektron CMS200/300, what's next? Several resources supplied by Ektron can help get your Ektron CMS200/300 Web site up and running. This chapter explains these resources.

### Menu.asp

Νοτε

This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

When installed, Ektron CMS200/300 creates an HTML Web page, Menu.asp, that serves as a site map to Ektron CMS200/300. The menu provides helpful links to the product as well as to the Ektron CMS200/300 sample Web sites.



#### Here is the Ektron CMS200/300 menu.

http://[YourWebServer]/CMS200/300sample/menu.asp

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

# The Sample Web Sites

NOTE

This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

Ektron CMS200/300 provides several sample Web sites to help familiarize you with the product before you create your site. Containing pages rich with text and images, the sample sites exemplify a working Ektron CMS200/300 Web site. The database contains users, user groups, and content that illustrate the various features and concepts of Ektron CMS200/300.

Five sample sites can be installed during installation. Each site has a different theme. Here are the names and themes of each sample 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	Medical	/CMS300Sample/CenturyMedicalServices/ index.asp

**NOTE** The person installing Ektron CMS200/300 determines which sample sites are installed. Contact that person to learn which sample sites are available.

# Logging Into an Ektron CMS200/300 Web Site

Before you can manage Web site content, you must log into your Web site. This section explains how to log in.

#### Before You Can Log In...

Before you can log into your Ektron CMS200/300 Web site, obtain the following information.

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

If you do not have this information, contact your Web site developer or the person who installed Ektron CMS200/300. For more information, refer to the Administrator's Quick Start manual.

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 in to your Ektron CMS200/300 Web site, follow these steps.

- Browse to your Web site's Ektron CMS200/300 login page (see "Before You Can Log In..." on page 10 for additional information).
- Click the Ektron CMS200/300 login button (Login
- 3. The Ektron CMS200/300 Login dialog box is displayed.
- 4. Enter your username and password. The default admin username and password are **admin/admin**.
- **NOTE** If your system is using Active Directory Integration, you must also specify your domain. See also "Logging into a System that Uses AD Integration" on page 475.
  - 5. Click the **Login** button.
  - 6. The Web page is now displayed.

After you are logged in, you can manage content from the Web pages or from your *Workarea*, the centralized location for all activities.

### Accessing the Work Area

Once logged into Ektron CMS200/300 as an administrator, you can access the Administrator Workarea. From there, you can perform all system activities, such as configuring and viewing every setting of Ektron CMS200/300.

To access the Administrator Workarea, follow these steps.

- 1. Log in to your Web site, as described in "Logging Into an Ektron CMS200/300 Web Site" on page 10.
- 2. Click the Workarea button ((workarea)) on login.asp page or a

Workarea toolbar button (S).

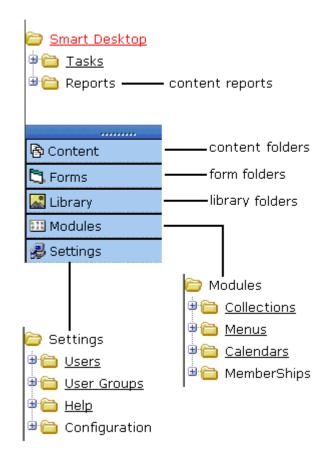
The Administrator Workarea has a Windows Explorer-like interface.

🗉 🕂 🗸	Smart Desktop for John Edit
➢ Smart Desktop ➡ ☐ Tasks ➡ ☐ Reports	Content Awaiting Approval (0)
	Content Currently Checked Out (1)
	🖉 <u>Tasks</u> (0)
Content	Content To Expire (0)
😳 Modules 🥵 Settings	

When you first access your workarea, your "Smart Desktop" is displayed. The smart desktop contains useful information that pertains to you.

The following graphic illustrates the location of **Ektron CMS200/ 300**'s major components in relation to the Smart Desktop display.

### **Ektron CMS Workarea Site Map**



### Work Area Navigation

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

- the left frame displays the folders of the system (For more information, see "The Left Frame" on page 14)
- the right frame displays some of the most common reports (For more information, see "Content Reports" on page 76)

Νοτε

Each category in the right frame is followed by a number indicating how many content blocks are in that status. **Content to Expire** lists how many content block

will expire within ten days. You can change the number of days by going to the report (**Smart Desktop > Reports > Content To Expire**) and selecting a different number.

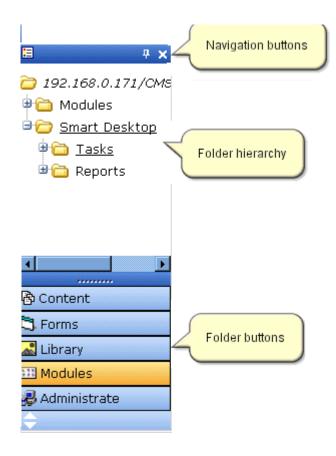
The number next to Tasks indicates how many open tasks are assigned to, or have been assigned by, you. Open tasks are those in one of the following states: not started, active, awaiting data, on hold, pending, reopened.

🗉	Smart Desktop for John Edit
➢ Smart Desktop ➡ ☐ Tasks ➡ ☐ Reports	Content Awaiting Approval (0)
	Content Currently Checked Out (1)
	🖗 <u>Tasks</u> (0)
🚯 Content	
🖏 Forms	Content To Expire (0)
🔜 Library	
💴 Modules	
뤚 Settings	

**NOTE:** Some Workarea Navigation features displayed in the above image are only supported in Ektron CMS300.

#### The Left Frame

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.

Button	Name	Description
<b></b>	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 toolbar button. *See Also:* "Folder Buttons and Toolbar Buttons" on page 16.

#### Folder Buttons and Toolbar Buttons

The workarea lets you access top level folders in the form of buttons. 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**.

🚯 Content
🕄 Forms
🔜 Library
💴 Modules
🛃 Settings

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.

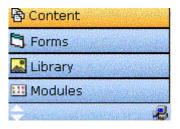
🗉 🕂 🛪	View Contents of Folder "	Cont	tent"		
Content	o Ch Ca 🗣 🗣 🖻 (	<b>14</b> f	7		to the the table to t
<ul> <li>Human Resources</li> <li>Marketing</li> <li>Products</li> <li>Support</li> <li>Syndication</li> </ul>	Title Contact Ektron Content Title Greeting Home Page Content Introducing the RC Redstar new content	15 31 24 1 23 30	A A A O A	Date Modified 26-May-2004 11:22:00 AM 14-Jun-2004 22:54:00 PM 12-Jun-2004 05:16:00 AM 04-Dec-2003 10:20:00 AM 04-Dec-2003 10:26:00 AM 12-Jun-2004 05:05:00 AM	Administr Administr Administr Administr Administr
	<u>Private Content</u> <u>Support Page</u> <u>Trinity In-Line Pipe</u>	2 8 22	А	03-Mar-2004 15:12:00 PM 27-Aug-2002 14:18:00 PM 04-Dec-2003 11:12:00 AM	Administr
Content S Forms					
EII Modules B Settings					

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.



# **Recognizing Content Blocks**

After you sign in, notice that, as you move the cursor, colored borders appears around areas of the Web page, as illustrated below. The border disappears when you move the cursor out of the area.

**NOTE** The colored borders only appear in site preview mode. See Also: "Site Preview" on page 28.



Click here to proceed to the demo site XML Content Show Calendar Contact Us Form

This is private content. Only users and members that have read permissions can view it.

CMS300 Membership allows non-CMS users to login to view private content.

To see this feature, login as member / member

Each surrounded area is a content block that can be edited independently.

The advantage of this feature is that you can see a Web page as it will appear to visitors to your site. Continue editing until you are satisfied with its appearance.

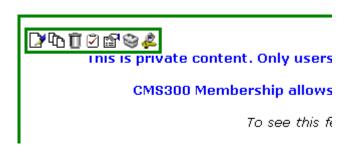
#### **Meaning of Border Color**

The table below describes the meaning of each border color.

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

#### The Button Menu

When a content block's border is visible, you can *right click* the mouse to display a button menu (an example is the small group of toolbar buttons in the green box below).



Toolbar buttons let you act on the displayed content and display important information about it. The toolbar buttons change depending on the content block's status or your permissions for the content block. For example, one toolbar button lets you edit the content block, while another lets you view previous versions of it.

## List of Ektron CMS200/300 Toolbar Buttons

The following table describes all toolbar buttons. Not all buttons are available in Ektron CMS200.

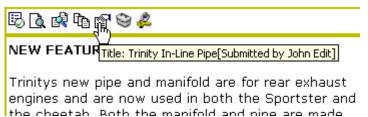
Toolbar Button	Name	Description	More Information
" <b>o</b>	Add Calendar Event	Allows you to add a calendar event to an Ektron CMS200/300 event calendar.	
Ŀ	Add Content	Allows you to add a new content block to a content folder, collection, calendar event or list summary.	
Ę	Approve	Clicking this button 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 25

Toolbar Button	Name	Description	More Information
2	Assign Task	Allows you to assign a task to a user.	"Managing Tasks" on page 289
		Note: This feature is not supported in Ektron CMS200.	
Û	Delete	Allows you to submit a request to delete the current content block.	"Delete ()" on page 26
D	Edit	Checks out the current content block to be edited by you.	"Edit ()" on page 24
¢.	Logout	Click this toolbar button to logout of the Ektron CMS200/300 view of the Web site.	"Logout ()" on page 28
<u>à</u>	Preview	Allows you to preview the content block before it is published to the Web site.	"Preview ()" on page 27
r an	Properties	Opens the content block's properties page where you can view important information about the current content block.	"Content Block Status" on page 22
٩	View Calendar Events	Views all calendar events for a selected date.	"Viewing Calendar Events" on page 354
₽3	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 24
₽ <u>₽</u>	View History	Opens the View History area where you can view the historical version of the current content block.	"View History ()" on page 26
3	Workarea	Opens the workarea where you can perform all your Ektron CMS200/300 actions from.	"Workarea ()" on page 27

## **Content Block Status**

After seeing a content block's border, you can get a more detailed status by hovering your cursor over the properties toolbar button

(
). When you do, the content block's title and current status appear, as shown below.



Below are the content block statuses and their abbreviations.

Letter	Border Color	Meaning	Content state
Α	green	Approved	Through the workflow and published on the Web site.
0	red	Checked Out	Currently being edited. Has not been checked in.
I	green	Checked In	Checked in for other users to edit.
S	yellow	Submitted for Approval	Saved and submitted into the approval chain. See Also: "Approving/Declining Content Blocks" on page 62
Μ	yellow	Marked For Deletion	Requested for deletion
Р	grey	Pending Go Live Date	Approved but the Go Live date hasn't occurred yet
Т		Task Assigned	Awaiting pre-approval process

For more information about

- content block statuses, see Appendix A of the Ektron CMS200/ 300 User Manual
- content block activities, see "Managing Content" on page 55

# Edit ( 🍞 )

Content in an Ektron CMS200/300 Web site can be in one of several states.

- A green border indicates you can check out the content for editing
- A yellow or red border indicates 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 until you check it in.

To edit a content block, follow these steps.

- 1. Log in to Ektron CMS200/300, as described in "Logging Into an Ektron CMS200/300 Web Site" on page 10.
- 2. Browse for the content block with a green border you want to edit.
- 3. Click the Edit button ()).
- 4. The Edit Content page is displayed.
- 5. From that page, you can
  - Edit content
  - Save changes
  - Check-in 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 toolbar button appears 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 made to the selected content block.

To compare the currently published version of a content block with the currently staged version, follow these steps.

- 1. Log in to Ektron CMS200/300, as described in "Logging Into an Ektron CMS200/300 Web Site" on page 10.
- 2. Browse through your Web site content until you find a content block that has a staged version to be compared with.
- 3. Click the View Differences button (A).
- 4. eWebDiff opens in a new window.

**NOTE** See "Comparing Current and Previous Content Blocks" on page 69 for additional information about using the CMS Compare utility to compare different versions of your content.

#### Approve (民)

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 of the content block, an Approve button (E) appears in the toolbar.

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 10.
- 2. Browse through your Web site content until you find the content block that is submitted and awaiting your approval.
- 3. Click the **Approve** button (E).
- 4. The Approve Content page is displayed.
- 5. Perform one of the following actions:
  - Approve (B) the content and submit it to the next approver. If you are the last approver, the content is published to the site.
  - Decline (
     ) the content, which checks the content block in and makes it available for editing by all users with permissions

 Click (X) 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 as in publishing a content block, a content block requested to be deleted must go through the approval process before it is removed from Ektron CMS200/300.

To delete a content block, follow these steps.

- 1. Log in to Ektron CMS200/300 as described in "Logging Into an Ektron CMS200/300 Web Site" on page 10.
- 2. Browse through your Web site content until you find the content block you want to delete.
- 3. Click the **Delete** button ( $\square$ ).
- **NOTE** If you don't see the Delete toolbar button, you don't have permissions to delete the content.
  - 4. The View Content page is displayed.
  - 5. Click the **Delete** button ( $\square$ ).

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, the content block is immediately 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 (ha)

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, follow these steps.

- 1. Log in to Ektron CMS200/300, as described in "Logging Into an Ektron CMS200/300 Web Site" on page 10.
- 2. Find the content block whose history you want to view.
- 3. Click the **View History** button ()).
- 4. The Content History window appears.

**NOTE** See"Content History" on page 64 for more information about viewing, comparing, and restoring historical versions.

## Preview (궡)

When a content block is in a state other than "Published," the preview toolbar button lets you view 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, follow these steps.

- 1. Log in to Ektron CMS200/300, as described in "Logging Into an Ektron CMS200/300 Web Site" on page 10.
- 2. Browse through your Ektron CMS200/300 Web site until you find the content block you want to preview.
- **NOTE** Content blocks with staged content can either have a green or yellow border. Look for the preview toolbar button, which indicates that the content has a staged version.
  - 3. Click the **Preview** button (

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 actions that you can perform. As an administrator, you have access to many more actions than a standard user.

To access your workarea, follow these steps.

- 1. Log in to Ektron CMS200/300, as described in "Logging Into an Ektron CMS200/300 Web Site" on page 10.
- 2. Navigate to any page that has an Ektron CMS200/300 content block displayed on it.
- 3. Click the Workarea button (😂).
- 4. The Workarea opens in a new window.
- **NOTE** For more information about the Workarea, see "Administrator Workarea" on page 38.

Logout ( 🙇 )

This button lets you log out of Ektron CMS200/300. See Also: "Logging Out of the Sample Site" on page 29

# **Closing the Administrator Work Area**

To close the Administrator Workarea, click the (X) button in the upper right corner.

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, you can preview the Web site as it would appear to visitors, or preview the Web site in Ektron CMS200/300 view.

Button	Name	Result
Preview	Preview On	Staged content blocks appear as if they are published.
× Preview	Preview Off	Colored borders surround content blocks, allowing you to perform workflow actions.

In site preview mode, you view the Web site as visitors would. The content blocks are always the last edited versions, as opposed to the normal view, where the most currently published versions of the content blocks display.

#### **Toggling Site Preview**

To toggle site preview on and off:

- 1. Navigate through your Web site until you find the login page.
- 2. The logout, workarea, and preview buttons are displayed.
- 3. Click the Preview On button.
- 4. The page is refreshed, and the Web site is in preview mode.
- To turn preview mode off, click Preview Off (Preview).
   button on the login page.

# Logging Out of the Sample Site

To log out of Ektron CMS200/300:

1. Click a Logout button (2) or click the Logout button

( Logout )) on login.asp page.

- 2. The Logout confirmation box appears
- 3. Click the **Logout** button.

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

# Modifying the Application Setup Screen

In the setup section of the configuration folder, you can enter or edit 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
- Work page size settings
- Task preappoval group

You must complete this before any user can access your Ektron CMS200/300 Web site.

# Viewing Application Setup Information

To view Ektron CMS200/300 setup information, follow these steps.

- Access the Administrator Workarea. See Also: "Accessing the Work Area" on page 11
- 2. Click the **Settings** folder in the left frame.
- 3. Expand the folder tree, and click the **Configurations** folder.
- 4. Click the Setup folder.
- 5. The Application Setup screen is displayed.

# Updating Setup Information

To update setup information, follow these steps.

- 1. Access the Application Setup screen, as described in "Viewing Application Setup Information" on page 30.
- 2. Click the Edit button ( ]).
- 3. The Application Setup screen appears. Update the fields as needed. The following table explains the fields.

Field	Description
License Key(s)	Enter the license key sent to you from Ektron via email into this field.
Module Licenses	Enter the license key for WebImageFX that was sent to you via email. See "Enabling WebImageFX" on page 34 for more information.
Default Application Language	Select a default language for Ektron CMS200/300. How Default Language is Used
	In the user profile, you can set each user's language. As a result, Ektron CMS200/300 screens and messages appear in that language.
	You can set any user's language to system default. Each user whose language is set to system default uses the language assigned here.
Maximum Content Size	In bytes, limit the size of each content block by specifying a maximum size. If a user's changes to a content block result in exceeding this limit, the user is told to reduce the size of the content before he can save it.
Maximum Summary Size	Limit the size of each summary by specifying a maximum size. If a user's changes to a summary result in exceeding this limit, the user is told to reduce the size of the content before he can save it.
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 email notification for the entire CMS. Un- checking this box disables email notification regardless of whether individual users have their email enabled.
Enable CMS to create file system folders for library assets	Check the box if you want to create physical folders on your file system machine that match the Ektron CMS200/300 library folder tree. See Also: "Enabling CMS to Create File System Folders" on page 34

Field	Description
Built - in User Information	Edit the username and/or password for the built in user. By default, the username and password combination is <b>builtin/builtin</b> . See Also: "BuiltIn User" on page 35
Editor Options	Toggle between displaying and not displaying font related buttons in the editor page. Also choose to remove styles and preserve MS Word styles and classes. <i>See Also:</i> "Editor Options" on page 36

#### Work Page Size

The following fields change the

- default editor screen size
- default Web page after sign-in
- default Workarea page

The default values are automatically applied to all new users, and to all existing users when you upgrade to 4.7 or higher.

You can also force these values on all users, removing their ability to personalize them.

If desired, change the width of the screen in which <b>Ektron CMS200/</b> <b>300</b> appears. The width in pixels must be between 400 and 2400. This field accommodates users who have larger monitors and/or prefer a smaller resolution, such as 1280 x 1024. The default value for this setting is 790.
If desired, you can change the height of the screen in which <b>Ektron CMS200/300</b> appears. The height in pixels must be between 300 and 1800.
This field accommodates users who have larger monitors and/or prefer a smaller resolution, such as 1280 x 1024. The default value for this setting is 580.

Field	Description	
Display button text in the title bar	Check this box if you want any button's caption text to appear in the screen title's bar whenever a user moves the mouse over the button. Note the word <b>Update</b> , describing the button, in the illustration below           Update           If you do not check this box, the screen's title remains in the title bar when the user moves the mouse over the button, as illustrated below.           Edit User "jedit"           If you do not check this box, the screen's title remains in the title bar when the user moves the mouse over the button, as illustrated below.	
Landing Page after login	If you want one page in your Web site to appear after users sign in, enter the URL to that page. By default, the page from which the user logged in reappears.	
Set smart desktop as the start location in the Workarea	If you want the Smart Desktop to appear as soon as users enter the Workarea, click inside this check box. <i>See Also:</i> "Work Area Navigation" on page 13 By default, the user sees the Smart Desktop after sign in. If you leave this check box blank, when you enter the Workarea, you go to the folder of the content block specified at the Landing Page after login field.	
Force preferences to all users	To force these settings on all <b>Ektron CMS200/300</b> users, check this box. If you do, users can see the values in the user profile screen but not change them. If you leave this box blank, users can personalize these values in their User Profile.	
Pre approval Group	If you want to create tasks automatically, select the user group that will assign such tasks. See Also: "Automatic Creation of Tasks Associated with Content Blocks" on page 301	

4. Make the necessary changes.

5. Click the **Update** button ( **I**).

# 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 online.

If you purchased WebImageFX when you purchased Ektron CMS200/300, you should have received an email with a license key for WebImageFX as well.

To enable WebImageFX within Ektron CMS200/300, from the application setup page, insert the WebImageFX license key in the **Module License** field.

	License Key(s) (comma aeminitea).	
1		
	Module Licenses: 1. Insert Ektron Web Image FX License Key Here	
(	Default Application Language:	
1	English (US)	
ector	Maximum Content Size (1 - 1,000,000 characters):	

# Enabling CMS to Create File System Folders

If this option is enabled, each time a new content/library folder is created in Ektron CMS200/300, a corresponding physical folder is created on the file system. This helps organize library assets on your file server.

**Ektron CMS Folder Tree File Server Folder Tree** Ξ [ CMS300Sample cms300scripts + + 🗎 cms300ws 🗋 cmswsdemo + 🗋 cmsxmlwsdemo Content + databases Library araphics 🔁 Human Resourc a uploadedfiles 🖻 🔄 <u>Marketing</u> 🚞 Human Resources 🖂 🚞 Marketing 🗉 🔁 <u>News</u> 🚞 News 🗏 🔁 Products 🖃 🚞 Products 🖻 🔄 RC Cars RC Cars 🖻 🚖 RC Planes 🗎 RC Planes 🛅 Syndication 🔁 Syndication 🖂 🚞 uploadedimages Approvals 🚞 Human Resources Donorte 🖂 🚞 Marketing 🛅 News 🖂 🧰 Products 🛅 RC Cars 🛅 RC Planes Syndication xminies +

The following illustration compares the library folder tree with the file system's folder structure.

Νοτε

If upgrading, the installation does not create sample Web site's folders on the file server. These folders must be added manually. However, all folders created by you are also created on the file server when enabled.

# **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 cannot login to your Ektron CMS200/300 Web site as the normal administrator.

**NOTE** The builtin user can log in to Ektron CMS200/300 whether or not Active Directory is enabled.

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

By default, the username and password combination for the builtin user is builtin/builtin. For security reasons, Ektron recommends changing the username and password upon installation.

#### **Editing the BuiltIn User**

To edit the builtin user's information, follow these steps.

- 1. Accessing the Edit Application Setup Information page, as described in "Updating Setup Information" on page 31.
- 2. Locate the **Built In User** field.
- 3. Edit the built in user information by changing the username and password.
- 4. Click the **Update** button ( **I**).

# **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 38
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. <i>See Also:</i> "Disable Font Buttons" on page 38
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.

Title: Plastic Molder #123	
Comment:	
Start Date:	End Date:
📗 🛃 (Apply Style) 🔹 Normal	🔹 🗸 Verdana 🔹 2 (10 pt) 🔹 🗛 💁 🖪 🖌 🗓
X 🖻 🛍 🖹 🛿 🖨 👭 🕰 🍜	P   v ~ 🖤 🐖 🥕 🍓 🍓 🚺 🖣   – 🌆 ờ 🖽   🖩
∐ 🛧 x² X₂   nbsp © ® TM € <sub>€</sub> j	▪    🎛 🖻   🖻 🔗 🥂    🗄 🗄 掌 掌 🗮 🗮 🌉
Job Title:	Plastics Molder
Job Number:	123
Description:	
IIPC International ja leading sun	plier of consumer level radio controlled vehicles, is look

RC International, a leading supplier of consumer level radio controlled vehicles, is look unlastics molder to join our team. The calibrative kill join our highly skilled team of ent

## **Disable Font Buttons**

Displayed here is the editor with the font buttons disabled.

Title: Plastic Molder #123	
Comment:	
Start Date:	📧 End Date:
🛛 🛃 (Apply Style) 🔹 Normal	• <b>B</b> <i>I</i> <u>U</u> A
X 🖻 🛍 🗎 🛛 🛱 🗛 🐴 🎒	🔎 🗠 🖓 😻 🥕 🕭 🍓 🎒 🖣 🗕 🖾
∐ A x <sup>2</sup> x <sub>2</sub>   nbsp © ® TM € <sub>+</sub> i →	⊞ □   @ @ 🕅   != = # #   = =
Job Title:	Plastics Molder
Job Number:	123
Description:	
RC International, a leading supp	lier of consumer level radio controlled vehic

# 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
S	Active Directory Refresh	Updates user and group information from the Active Directory to Ektron CMS200/300.	"After Integration is Enabled" on page 478
	Active Directory Replace	Replaces Active Directory users and user groups.	"Replacing a User" on page 479, "Replacing a User Group" on page 485
<mark>₽</mark>	Add	A generic add is used in several areas to add items.	
- <mark>-</mark> -	Add Calendar	Accesses the add calendar page.	"Adding a New Calendar Module" on page 194
<b>"</b> o	Add Calendar Event	Accesses the add calendar event page in the workarea.	"Adding Basic Calendar Events" on page 208
6	Add Content Block	In a content folder, this button lets you create a new content block.	<ul> <li>"Adding HTML Content" on page 56</li> <li>"Adding XML Content" on page 58</li> </ul>

Button	Name	Description	More Information	
<b>B</b>	Add Content Folder	In a content folder, this button lets you create a sub-folder to help organize content.	"Adding Sub-Folders" on page 52	
Ao	Add Font	In the font folder, this button lets you add a font to your Web site	"Adding Fonts" on page 285	
<b>₽</b>	Add Form	Accesses the add form page.	"Adding a New Form" on page 248	
<b></b>	Add Library Item	In the library folder, this button lets you upload an image or file, or add a hyperlink or quicklink to use in content.	"" on page 122	
<u></u>	Add Membership Group	Create a new membership user group.	"Private Content & Memberships" on	
		Note: This feature is only supported in Ektron CMS300.	page 132	
<u>5</u>	Add Membership User	Create a new membership user.	"Private Content & Memberships" on	
		Note: This feature is only supported in Ektron CMS300.	page 132	
₩.	Add Metadata Definition	In the Metadata area of the workarea, this button lets you add another metadata definition to your application.	"Adding a Metadata Definition" on page 83	
3	Add Task	Assign a task to an Ektron CMS200/ 300 User.	"Managing Tasks" on page 289	
		Note: This feature is only supported in Ektron CMS300.		
£	Add User	In the user folder, use this button add CMS users to your Web site	"Creating A New User" on page 124	
s	Add User Group	In user group folder, this button lets you create new CMS user group	"Viewing A User" on page 126	

Button	Name	Description	More Information
X	Add XML Configuration	Add new XML configuration for your Web site	"Adding a New XML Configuration" on page 149
5	Approvals	In the content folder, this button displays the approval chain for a content folder or a content block.	"Setting Approval Chains" on page 94
B	Approve	Approve content awaiting your approval	"Approve ()" on page 25
ß	Approve All	In the approvals folder, this button lets you approve all content awaiting your approval with one click.	
←	Back	Return to previous page.	
	Calendar	Opens a calendar on which you can choose the date and time when your content goes live	"Scheduling Content" on page 68
×	Cancel	Cancel the action you are performing without saving information	
<b>B</b>	Check-in	Save and check in content block you are working on	
<b>B</b>	Check-out	Check out a content block to edit	
ß	Collection	Access collection area for a content block and create, edit, and delete collections.	"Collections" on page 320
<b>I</b>	Decline	Decline an approval request	
Ũ	Delete	Deletes selected item.	
<u>L</u>	Delete Content	Allows you to delete multiple content blocks at once.	"Deleting a Single Content Block" on page 64

Button	Name	Description	More Information
f	Delete Folder	Deletes the current content folder.	"Deleting Folders" on page 53
<u>i</u>	Delete Form	Delete a form	"Deleting a Form" on page 268
<b>.</b>	Do Not Apply XSLT	Removes XSLT applied to XML content viewed in the content history area.	
	Edit	Edit content or criteria in the workarea.	"Editing Content" on page 62
2	Edit Data Design	Create data design	"Editing Data Design Packages" on page 161
	Edit Form	Accesses the edit form page to make changes to an existing form.	"Editing a Form" on page 265
13	Edit Full Text Search Settings	Accesses Full Text Index Search configuration for an XML configuration	
	Export Form Report	Exports form data.	"Exporting Form Reports" on page 261
₽	Insert Library Item	From the library, this button inserts selected library item into your content block.	"Managing Library Assets" on page 102
	Link Check	Searches Web site content to locate where the content or asset is linked from.	"Link Checking" on page 66
	Load Balance	Used in the library to specify folders outside the Ektron CMS200/300 Web site to which images and files will be added.	"Load Balancing" on page 118
	Move Content	Move content blocks to another content folder.	"Moving Content" on page 63
2	Overwrite	Overwrite existing image or file with a different version	"Overwriting Images and Files" on page 109

Button	Name	Description	More Information
ŧ	Permissions	Set permissions for content folder or content block.	"Setting Permissions" on page 87
<u>D</u>	Preview	Preview library item that was or will be added.	"Viewing Library Assets" on page 108
<b>™</b>	Properties	Displays and lets you edit properties for corresponding content folder	"Folder Properties" on page 48
60	Publish	Save and publish content block to your Web site	
<b>C</b>	Purge History	Access the purge history screen.	"Purge History" on page 51
	Remove	Removes items from folders and lists in the Workarea.	
₹↓	Reorder	Reorders 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 328
Ľ	Restore	Initiate restoration of previously published version of the content block.	See "Viewing and Restoring Previous Content Blocks" in the <b>Ektron CMS200/300</b> User Manual
	Save	Save content that was modified.	
<i>8</i> 4	Search	Access the search content and library folder pages.	"Search Content Folder" on page 53
31	Show Calendar	Displays the calendar in the workarea.	"View Calendar" on page 201
ß	Submit	Save and submit edited content to next approver in approval chain.	
	Update	Save changes	

Button	Name	Description	More Information
Q	View Date	View calendar events for a selected day	"Viewing Calendar Events" on page 216
R	View Difference	Opens the Ektron CMS200/300 compare utility.	"Comparing Current and Previous Content Blocks" on page 69
	View Form Reports	Displays reports about data entered via form modules.	"Viewing Form Reports" on page 257
		Note: This feature is only supported in Ektron CMS300.	
₽ <u>`</u>	View History	Displays history of content block.	"Accessing the View History Window" on page 65
þ	View Published	Displays the published version of the content block	
<u>¢</u>	View Staged	When a content block is not active, displays the updated content.	
	View XSLT	Displays default XSLT for XML configuration.	"Viewing Data Designer XSLTs" on page 170

# **Managing Content Folders**

When you enter the Content folder in Ektron CMS200/300 as an Administrator, you can 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.

🚈 Ektron CM5300 Workarea for Application Administrator - Microsoft Internet Explorer						
CMS300	WOF	RK/	AREA	Tuesday, Au		
🗉 🛛 🗖 🗙	View Contents of Folder	'Cor	ntent"	มีขณะที่มีคนที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่ เป็นสารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่		
🗁 <u>Content</u>	🕒 🗗 🗳 🗣 👘 🖗 🖻	M	P			
🕆 🛅 <u>Human Resources</u>	Title	ID	Status	Date Modified Last Editor		
🖲 🧰 <u>Marketing</u>	Contact Ektron	15		26-May-2004 11:22 AM Administrator		
🖻 🛅 <u>Products</u>	Greeting	24		04-Dec-2003 10:57 AM Administrator		
🖲 🛅 Support	<u>Home Page Content</u>	1	А	04-Dec-2003 10:20 AM Administrator,		
🖮 🛅 Syndication	Introducing the RC Redstar	23	0	04-Dec-2003 10:26 AM Administrator		
	<u>new content</u>	31	Ι	18-Aug-2004 05:52 PM Administrator		
	Private Content	2	A	03-Mar-2004 03:12 PM Administrator		
	Support Page	8	A	27-Aug-2002 02:18 PM Administrator		
🗟 Content	<u>Trinity In-Line Pipe</u>	22	S	04-Dec-2003 11:12 AM Edit, John		
🕄 Forms						
🔜 Library						
🖽 Modules						
🥵 Settings						

In this chapter you will learn about the add, edit, publish, and delete functions of content blocks. Permissions and Approvals are explained in later chapters.

# What's In This Chapter

The following information is included in this chapter:

- "Accessing the Content Folder" on page 46
- "Folder Properties" on page 48
- "Purge History" on page 51
- "Adding Sub-Folders" on page 52
- "Deleting Folders" on page 53
- "Search Content Folder" on page 53
- "Search Content Folder" on page 53

# Accessing the Content Folder

To access the content manager:

- 1. Access your Workarea.
- 2. Click the content folder in the folder tree on the left side of the Workarea.

A list of content blocks that belong to the root content folder appear in the main section of the Workarea, and the content folder expands to display the sub-folders.

🚈 Ektron CMS300 Workarea for Application Administrator - Microsoft Internet Explorer							
CMs300	WOF	WORKAREA			Tuesday, Aug	User: admin gust 31, 2004	
🗉 🛛 🖓 🗙	View Contents of Folder	"Cor	ntent"				
Content	D 🗗 🗳 🤜 📅 🖻 🖻	<b>#</b>	r				
Human Resources	<u>Title</u>	ID	<u>Status</u>	Date Modified		Last Editor	
■ ☐ <u>Marketing</u> ■ ☐ <u>Products</u>	<u>Contact Ektron</u>	15	A	26-May-2004 :			
Disport	<u>Greeting</u> <u>Home Page Content</u>	24 1	P A	04-Dec-2003 1 04-Dec-2003 1			
Cyndication	<u>Introducing the RC Redsta</u> new content	<u>r</u> 23 31	O I	04-Dec-2003 1 18-Aug-2004 0			
	Private Content	2	A	03-Mar-2004 C	)3:12 PM	Administrator,	Application
 Content	<u>Support Page</u> Trinity In-Line Pipe	8 22	A S	27-Aug-2002 0 04-Dec-2003 1			Application
S Forms							
🔜 Library							
III Modules							
😼 Settings							
I <u>▼</u>						🌍 Internet	

From the content folder, you can perform administrative actions, as well as maintain content.

Each folder display the following information about the content blocks.

Field	Description
Title	The name given to the content block by the creator.
Language	The content block's language. See Also: "Working with non-English Content" on page 362
ID	The number assigned to the content block by Ektron CMS200/300. It allows the content to be called from the database properly.
Status	The current status of the content block. See Also: "Content Block Status" on page 22
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 have the following options

Button	Name	Description	More Information
D	Add Content	Opens the editor and creates a new content block in the current folder.	"Adding Content" on page 55
Ŀ	Delete Content	Delete multiple content blocks at once	"Deleting Folders" on page 53
<u>[</u>	Move Content	Move multiple content blocks from one content folder to another	Moving Content in the "Working with Folders and Content Blocks" chapter of the Ektron CMS200/300 User Manual
R	Add Folder	Add a sub-folder to the current folder.	"Adding Sub-Folders" on page 52

Button	Name	Description	More Information
Ē	Delete Folder	Click to delete the current folder.	"Deleting Folders" on page 53
		Note: You cannot delete the parent folder, " <b>Content</b> ."	pago co
B	Collections	Add, edit, or delete a collection from content folder	"Search Content Folder" on page 53
#4	Search	Search through content in the workarea	"Search Content Folder" on page 53
ď	Properties	View properties of current folder. In the properties window, you will be able to set permissions, approvals, etc	"Folder Properties" on page 48

# **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 the content folder you want to edit the properties for.

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

2. Click the **Properties** ( 1) button.

3. The View Properties page for the folder is displayed.



#### **Folder Properties Toolbar**

The folder properties page contains the following toolbar buttons.

Button	Name	Description	More Information
	Edit Properties	Access the Edit Folder properties page	"Editing Folder Properties" on page 50
Ē	Permissions	Access permissions table for content folder	"Setting Permissions" on page 87
<u>\$</u>	Approvals	Access approvals table for content folder	"Setting Approval Chains" on page 94
	Purge History	Access purge history table for content folder	"Purge History" on page 51
÷	Back	Go to 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, follow these steps.

- 1. Access the View Properties page for the content folder you wanrt to edit, as described in "Accessing The Folder Properties Page" on page 48.
- 2. Click the edit button ( $\square$ ).
- 3. The Edit Properties page for the content folder is displayed.

Edit Properties for the folder "Content"

#### Foldername:

Content

#### Description

#### Style Sheet filename for this folder: (leave blank to inherit)

/CMS300Sample/default.css

#### Template filename for this folder: (leave blank to inherit)

/CMS300Sample/index.asp

-Select an existing template here- 💌

#### XML Configuration:

Inherit XML Configuration

–None – HTML– 💌	à
-----------------	---

4. 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.

Field	Description
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.

5. Click the **Update** button (**I**) to save the changes.

The page is refreshed, and the changes are updated.

#### **Purge History**

The purge history option lets you delete some or all historical records of content blocks in a folder. To purge the history for a content folder, follow these steps,

- 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 48.
- 2. Click the Purge History button ( 1).
- 3. The purge history screen is displayed.
- 4. Use the following table to modify the purge history options:

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

- 5. Click the **Purge History** button ( **Physical Purge**) to execute the purge.
- 6. A confirmation message is displayed.
- 7. Click **OK** to continue.
- 8. Ektron CMS200/300 executes the purge process, and a confirmation page is displayed when complete.

# 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. Navigating to and Click the folder under which you want to create a sub-folder.
- 2. Click the Add Folder button ( 🖳 ).
- 3. The Add a Subfolder to Folder page is displayed.
- 4. Enter the required information in the 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.

5. Click the Save button (

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

# **Deleting Folders**

You can delete obsolete folders from the Ektron CMS200/300 Web site.

**CAUTION!** Deleting a content folder 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 want to delete.
- 2. Click the **Delete Folder** button (<u>)</u>) in the toolbar at the top of the page.
- 3. A confirmation message is displayed.
- 4. Click **OK** to proceed.
- 5. The page is refreshed, and the content folder is deleted.

# Search Content Folder

You can search a folder to easily and quickly locate any content block within your Web site. The following section explains how to use the content search.

#### Accessing the Search Content Page

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

- 1. Navigate to any content folder in the Workarea
- Click the Search button ( M).

3. The Search Content Folder page appears.

#4 ←

#### Enter keyword(s)

Search Content Folder

Search

#### Only return results where keyword(s) occur in:

- 🖸 Title
- O HTML
- C Text Only
- 🔿 Metadata
- 🗆 Unpublished Content
- Content last edited by myself

<ol><li>Use the following table to customize your content sea</li></ol>
---

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

- 5. Click the **Search** button ( ) or Click the Search button next to the Enter keywords text field to begin the search.
- 6. All results that match the search criteria appear.
- 7. IUf desired, click 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 can control every aspect of the content and folders. Some controls include setting permissions, approvals, and adding, editing, publishing, and deleting content blocks. Shown below is the Content folder.

Ektron CMS300 Workarea for A	pplication Administrator - Micro	osof	t Intern	et Explorer	<u> </u>
CMS300	WOR	K/	REA		User: admin Tuesday, August 31, 2004
🗉 🕂 🛪	View Contents of Folder "	Cor	ntent"	นี้ยาที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่สารที่ส	
Content	🕒 🕞 🗳 🗣 👘 🖗 🛍 🤅	M (	P		
Human Resources	<u>Title</u>	ID	<u>Status</u>	Date Modified	Last Editor
■ ☐ Marketing   ■ ☐ Products	<u>Contact Ektron</u> Greeting	15 24	A P		Administrator, Application Administrator, Application
⊕ 🛅 <u>Support</u>	Home Page Content	1	А	04-Dec-2003 10:20 AM	Administrator, Application
<sup>™</sup> <sup>™</sup> <u>Syndication</u>	Introducing the RC Redstar new content	23 31	O I		Administrator, Application Administrator, Application
	<u>Private Content</u> Support Page	2 8	A A		Administrator, Application Administrator, Application
🗟 Content	Trinity In-Line Pipe	22	S	04-Dec-2003 11:12 AM	Edit, John
🕄 Forms					
🔜 Library					
III Modules					
😼 Settings					
e	-				🔮 Internet 🛛 🕼

In this chapter you will learn about the add, edit, publish, and delete functions of content blocks. Permissions and Approvals are discussed in later chapters.

# Adding Content

There are two basic types of content folders: HTML and XML. An XML folder has an XML configuration assigned to it. If not, the content folder will create HTML content blocks

#### Adding HTML Content

As an administrator, you can 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 these steps.

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 permissions for it.

- 2. Click the Add Content button (
- 3. The Add Content window opens.

🔓 🖬 🖬 🗙				
Title:				
Add to Quicklinks table				
Content Summary Meta	adata    Schedule    Comm	ient		
🔄 🛃 (Apply Style) 🔹 Norr	nal 🔹 Verdana	▼ 2 (10 pt)	• 🗛 🗞	<b>В</b> <i>I</i> <u>U</u> A
🛛 🕹 🛍 🖪 🖪 🛱 🚧 4	¶ ∰ P   ∽ ~   Ÿ ‱	🖊 🕭 🍓 🚺	j 🐴   - 📓	2/ 💷 🛛
<mark></mark> A x <sup>2</sup> x <sub>2</sub>   nbsp © ® TM =	€,, , ,	& ]!≡ ∎ 9	▝律│≧≡	: 🗏 🔳 🐹 🧕

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

Field	Description
Title	Enter a title for the content block.

Field	Description
Add to Quicklinks Table	Check this box if you want to save a Quicklink to the content block saved to the database when you save the content.
	If you uncheck this box, <b>Ektron CMS200/300</b> does not create a quicklink for this content block.
Content Searchable	Check this box if you want this content block to be included in an external search of your CMS web site.
	If you uncheck this box, <b>Ektron CMS200/300</b> excludes the content block when doing a search.
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.* 

5. After you enter the body text, you have the following options.

Button or Tab	Description
Summary	Edit the summary for content block See Also: "Summaries" on page 80
Metadata	Edit the metadata for content block See Also: "Metadata" on page 82
Schedule	Assign start or end dates, or both, for when content is published to Web site See Also: "Scheduling Content" on page 68
Comment	Enter history comment to indicate changes made to content
Submit	Submit content block into approval or pre-approval process
Publish	Publish content to Web site.
	Note: Only the last approver in the approval chain sees this button.
Check In	Save and check-in content. Click this button does not submit the content into the approval process, but rather lets other users change it.

Button or Tab	Description
Save	Save the content without submitting it into the approval process. If a user clicks save and then closes the editor, other users cannot edit the content.
Decline	This buttons appears if you are the next approver in the approval list. Click it to decline the changes made to the content.
Cancel	Close the editor without saving changes.

#### Adding XML Content

Νοτε	This feature is not available with Ektron CMS200. 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 can create XML content within that folder. To add an XML content, follow these steps.

- 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.
  - Follow the steps described in "Adding HTML Content" on page 56.
- **NOTE** Depending on the XML configuration assigned to the content block, the default XML may appear differently.

## 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 want to view.

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

- 2. Click the title of the content block you want to view.
- 3. The View Content page is displayed.



#### Welcome to RC International!

RC International is dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. In three short years RC International has become one of the leading manufactures of RC racing and flying vehicles. Our dedication to the sport, and the enthusiasts who play it, has endeared our products to the RC community. We will continue striving to improve our affordable products and hope you will become an RC International member.

To learn more about the Content, Summary, Metadata and Comment tabs, see "Adding Content" on page 55. The properties tab is described below.

#### Information on the Properties Page

The content properties page displays the following information about the selected content block.

Field	Description
Content Title	Title assigned to content block

Field	Description
Content ID	Content ID # assigned to content block
Status	The content block current status. See Also: "Content Block Status" on page 22
Last User to Edit	Last user to edit this content block.
Last Edit Date	Date and time when this content block was last edited.
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	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 for the content block.
Content Searchable	Tells you whether the content block is searchable or not.

#### **Content Toolbar Buttons**

To learn about the toolbar buttons, see that can appear. Depending on the status of the content block, some toolbar button do not appear.

Button	Name	Function	More Information
	Edit	Check out content block to change it.	"Editing Content" on page 62
Ū	Delete	Submit a request to other approvers in the approval chain to delete the content. If you are the last or only approver, the content is deleted immediately.	"Deleting a Single Content Block" on page 64

Button	Name	Function	More Information
	Move Content	Move content block to another folder.	"Moving Content" on page 63
Ē	Permissions	Assign permissions to content block. By default, permissions are inherited from parent folder.	"Setting Permissions" on page 87
8	Approvals	Set up an approval chain for a content block. By default, approvals are inherited from parent folder.	"Setting Approval Chains" on page 94
	Link Check	Find content blocks with a link to displayed content block	"Link Checking" on page 66
<b>A</b>	Add Task	Assign to a user a task that pertains to selected content block.	"Assigning Tasks to a Content Block" on page 66
		Note: This feature is only supported in Ektron CMS300.	F 191
<b>P</b>	Edit Properties	Change XML configuration assigned and whether content is searchable.	"Content Properties" on page 66
←	Back	Go to previous window	

# Editing Content

As an administrator, you can only edit content blocks that are published, checked in, checked out by you, or submitted for your approval.

Ektron CMS200/300 has two types of content blocks.

- HTML content blocks no XML configuration assigned to content's folder
- XML content blocks XML configuration assigned to content's folder

To edit a content block, follow these steps.

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

- 1. Access the View Content page for the content block you want to edit, as described in "Viewing Content" on page 60.
- 2. Click the Edit button ( []).
- 3. The Edit Content window opens.
- 4. Make the necessary changes to the content block. Refer to "Adding HTML Content" on page 56 or "Adding XML Content" on page 58 for details about the information you can change.

When completed, choose a workflow option at the top of the window.

### **Moving Content**

You can move one or several content blocks from any content folder to any other folder. To learn how, see the section "Moving Content" in the "Working with Folders and Content Blocks" chapter of the **Ektron CMS200/300** User Manual.

# Viewing and Restoring Historical Versions of Content

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, restored to the Web site.

For more information, see the Viewing and Restoring Previous Content Blocks section of the **Ektron CMS200/300** User Manual.

## **Deleting Content**

You can delete a single content block or several content blocks in a folder. Both procedures are explained below.

NOTE

Only published and expired content blocks can be deleted.

#### **Deleting a Single Content Block**

You can permanently delete from the Ektron CMS200/300 database content blocks that are no longer needed on your Web site. To delete a content block:

- 1. Access the View Content page, for the content block you want to delete, as described in "Viewing Content" on page 60.
- Click the **Delete** button (
   ).

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.

#### **Deleting Several Content Blocks in a Folder**

At the view content folder page, you can delete multiple content blocks at one time. To do so, follow these steps.

- 1. Access the content folder that contains the content blocks you want to delete.
- Click the Delete Content button (
   ).
- 3. The Delete Contents of Folder page is displayed.
- Check the boxes next to the content blocks that you want to delete.
- **NOTE** Check off the box in the header cell to select all or deselect all.
  - 5. Click the **Delete Content** button (P).
  - 6. A confirmation message is displayed.
  - 7. Click **OK** to continue.

The selected content blocks are deleted.

# **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:

- Access the View Content page for the content block you want to view the history of, as described in "Viewing Content" on page 60.
- 2. Click the View History button ( The ).

View Content History "Home Page Content"

3. The content history page opens in a new window.

#### **Published** Date

- <u>04-Dec-2003 10:20 AM</u>
   <u>04-Dec-2003 10:20 AM</u>
   04-Dec-2003 09:45 AM
- 04-Dec-2003 09:43 AM
   04-Dec-2003 09:44 AM
   04-Dec-2003 09:44 AM
- 04-Dec-2003 09:44 AM 04-Dec-2003 09:42 AM 04-Dec-2003 09:42 AM 04-Dec-2003 09:41 AM
  - 04-Dec-2003 09:37 AM entr

Content Summary Metadata Properties Comment Content: Welcome to RC International!

RC International is dedicated to the RC racing enthusiasts! We eat, w live RC racing. In three short years RC International has become one manufactures of RC racing and flying vehicles. Our dedication to the s enthusiasts who play it, has endeared our products to the RC commu continue striving to improve our affordable products and hope you wil International member.

#### **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 64.

## **Content Block Permissions**

See "Setting Permissions" on page 87.

## **Content Block Approvals**

See "Setting Approval Chains" on page 94.

# 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:

- Access the View Content page, for the content block you want to execute the link checker for, as described in "Viewing Content" on page 60.
- Click the Check Links button ( ).

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

 Click 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

NOTE

This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

See "Managing Tasks" on page 289

## **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:

- Access the View Content page for the content block whose properties you want to view, as described in "Viewing Content" on page 60.
- 2. Click the Properties button ( 1).
- 3. The View Properties for the Content page appears.

Stron Caras	Workarea
<b>=</b> •	× View Properties for the Content "hello"
<ul> <li>192.168.0.102/C.</li> <li>Content</li> <li>ABC</li> <li>Forms</li> <li>Content</li> </ul>	<ul> <li>✓ XML Configuration:</li> <li>✓ Inherit XML Configuration</li> <li>─None - HTML- </li> <li>▲ p</li> <li>✓ Content Searchable</li> </ul>
🕽 Forms 🌄 Library 🛄 Modules	
🐉 Administrate	
Done loading	🕑 Internet
	<ol> <li>Make any necessary changes. See "Assigning XML Configurations" on page 154 for more information.</li> </ol>

- 5. Click the **Update** button (
- **NOTE** If you click the Properties button for a content block that is displayed on a Web page, the View Content page opens in the workarea window.

# Scheduling Content

Scheduling content allows you to create a content block, and specify a date and time in the future when you want 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.

For more information, see "Scheduling Content to Begin and End" in the **Ektron CMS200/300** User Manual.

# Comparing Current and Previous Content Blocks

Ektron CMS200/300 has a feature that lets you compare the currently published version of a content block with a staged or historical version. The feature lets you quickly find the changes made to a content block.

Below is an example of a published content block in Ektron CMS200/300 being compared with a staged version.



As you can see, content changes are identified by redlining the deleted content and highlighting the added content.

# When Can I Compare Content?

The Ektron CMS200/300 comparison feature is only available when viewing historical versions or when the content has a

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 can be compared with another version is denoted by the **View Difference** button ( $\underline{\mathbb{R}}$ ) in the content history area or the toolbar button ( $\underline{\mathbb{R}}$ ) on the Web page view.

# The Compare Content Window

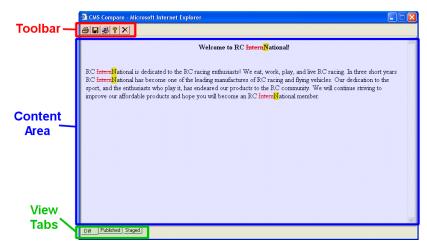
Before using the content compare feature, you should have some knowledge of the compare content window and buttons.

**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 74 for additional information.

As you can see, the Compare Content window has the following:

- Toolbar
- Content window

• View content tabs.



Each field is explained below.

#### **Content Area**

The content area is the section of eWebDiff that displays the content comparison.

CMS Compare - Microsoft Internet Explorer
Welcome to RC InternNational!
RC InternNational is dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. In three sh RC InternNational has become one of the leading manufactures of RC racing and flying vehicles. Our dedication t sport, and the enthusiasts who play it, has endeared our products to the RC community. We will continue striving

improve our affordable products and hope you will become an RC InternNational member.

The following table explains each symbol on the screen.

Symbol	Example	Description
Plain Black Text	Trinitys new pipe and	Unchanged content.

Symbol	Example	Description
Yellow Highlighted Text	Our dedication to the	Added Content.
Red, Struck-through text	<del>dedicated to the RC</del>	Deleted content.

#### Toolbar

The content comparison toolbar contains five buttons, explained below.

Button	Name	Description	More Information
4	Print	Sends content to local or network printer	
		Note: The print option prints the currently displayed content, whether it is the compared content, published content, or staged content.	
	Save	Saves a copy in HTML format on your local machine or network	"Save" on page 72
2	Setup	Opens setup dialog box to configure the eWebDiff settings	"Setup" on page 73
Ŷ	Help	Displays useful information about using eWebDiff.	
×	Exit	Closes the window	

#### Save

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 are not 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.

🖣 Ektron eWebDiff	
<ul> <li>Compare visual aspect</li> <li>Compare source code</li> </ul>	
Whitespace C Ignore All © Smart Detect C D <u>e</u> tect All	Other Ignore Case Ignore <u>f</u> ormat attributes
	kCancel

You may configure the setup options to better suit your needs. The following table explains each option.

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.
Smart Detect	One ore more consecutive whitespace characters are treated as a single separation sequence. That is, ignore multiple blanks.

Option	Description
Detect All Blank (whitespace) characters are treated any other character.	
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).

After you update setup information, click **OK** to save any changes and return to eWebDiff.

#### **View Tabs**

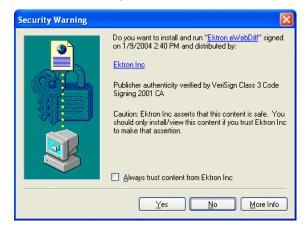
When viewing content within eWebDiff, there are three view modes:

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.

To switch between views, click a 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.

When the installation program completes, close and reopen eWebDiff.

# **Content Reports**

The Reports folder contains various content reports. For information about them, see the "Content Workflow Reports" section of the **Ektron CMS200/300** User Manual.

# Inserting Comments within Content

**NOTE** This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

While editing **Ektron CMS200/300** content, you can insert comments to the content. Comments might be an author's note to himself or other authors about the content block. For example, you could insert a comment explaining why you are using a certain style class.

They are visible only during editing -- comments *cannot* be seen when the content is published on your Web site.

To learn more about using comments, see the "Inserting Comments within Content" section of the **Ektron CMS200/300** User Manual.

# Adding Content Programmatically

**NOTE** This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

Content can be created using a special function which lets users add new content without logging in. To accomplish this, your Web site developer places a form on your Web site which lets users submit content without login. Here is a sample Add Content form.

🚰 Add Content Programatically - Microsoft Internet Explorer						
<u> </u>	orites <u>T</u> ools <u>H</u> elp					
G • 🕤 · 🖹 🖻	1 🚯 🔎 🛧 1	😵 🐵 🔯 - 🗟 🖬 - 🗔 🤌	3			
Address 🕘 http://127.0.0.1/cms300sample/addcontent.asp						
Add Content Programatically To CMS						
Username:	admin					
Password:	admin					
Domain:		(when using Active Directory)				
Title:	This is the content	title	(as text)			
Comment:	This is the comme	nt	(as text)			
Content: Summary:	content	e <strong>HTML</strong>		e (as HML cont		
				🧾 (as HML cont		
Meta Data( IItle):	Add content through asp example (as text)					
Meta Data	Meta Data add; content; asp; example					
Your Web site developer can further customize this form to better suit your needs. See the Ektron CMS200/300 Developer Manual for additional information.						

# Summaries

Summaries are used to introduce each item in a list of content blocks on an Web page.

There are many uses for this. A good example might be a news Web site, on which you can list 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 example above has many benefits. For example, the titles of the summaries are the titles of the content blocks, and they link to the full article. Below each title is a brief summary that gets the reader's attention.

The summaries can include the same characteristics of a content block: images and files may be included, as well as different font styles and sizes.

This chapter explains summaries and how they can help navigation in your site.

# **Creating Summaries**

To create a summary, follow these steps.

1. Navigate through your Workarea to the content block whose summary you want to create or edit. Or, if you are creating a new content block, navigate to the folder where you want to create the content.

For information about adding a new content block, see "Adding Content" on page 55.

- 2. Click the Edit Summary tab.
- 3. The Edit Summary window opens.
- 4. Enter a summary for the content block that you are creating.

A summary may be as long as you are allowed. You can include images, files, and hyperlinks.

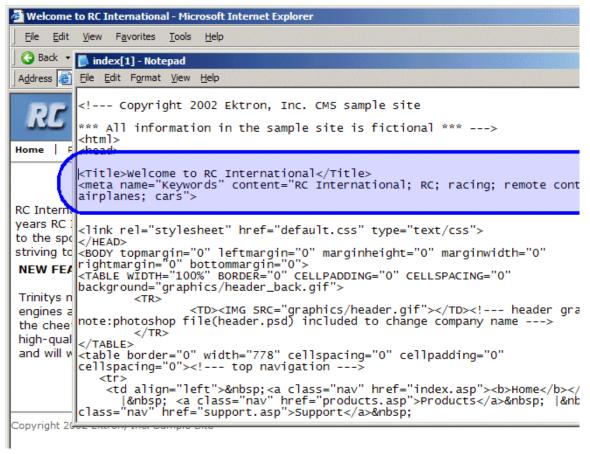
#### 5. Click the **Save** button ( **E**).

The summary is saved, and you return to the Add Content window, where you can finish adding your content.

**NOTE** Keep in mind when you edit the summary of an existing content block, it goes into a checked out state. After creating the summary, check the content block back in. From that point, you must submit it or publish it.

# Metadata

Metadata in Ektron CMS200/300 is used in the HTML code of each Web page. When you create a content block, you can define its metadata. 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 an Ektron CMS200/300 Web page.



As you can see, there is a title and keywords defined for the content block. Each were defined while creating the content block

This chapter explains the features of the metadata feature of Ektron CMS200/300.

## **Managing Metadata Definitions**

Each Ektron CMS200/300 content block can have its own unique metadata that the author can easily add.

#### **Defining Metadata**

The metadata types, such as keywords and title, are defined by an Ektron CMS200/300 administrator. As a result, the number of metadata types are determined by the number the administrator defines in the workarea. When defining metadata, you are not limited but each type must be unique.

Metadata tags are defined by the administrator in his/her Workarea.

To define metadata, perform the following steps:

- 1. Access the Workarea.
- 2. From the left frame, click the **Settings** folder.
- 3. Click the **Configuration** folder to expand the tree.
- 4. Click the Metadata Definitions folder.
- 5. The View Site Metadata Definitions page appears.

From here, you can add, edit, and delete metadata types to be used for each content blocks.

#### 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 83.
- 1. Click the Add Metadata button (M).
- 2. The Add Metadata Definition page appears.
- 3. Add the necessary information to create the metadata definition. Use the following table to assist you.

#### Metadata Definition Fields

Field	Description
Name	Enter a name that will be used to identify 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"
Туре	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 want 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.

4. Click the **Save** button ( $\square$ ).

#### **Viewing Metadata Definitions**

You may view any metadata definition. To do so, follow these steps.

- 1. Navigate to the Metadata Definitions page in the administrator workarea, as described in "Defining Metadata" on page 83.
- 2. Click the metadata definition you want to view.
- 3. The View Metadata Definition page is displayed. From here, you can 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. Access the view metadata definition page for the metadata definition you want to edit, as described in "Viewing Metadata Definitions" on page 85.
- Click the Edit button ( ).
- 3. The Edit Metadata Definition page is displayed.
- 4. Make the necessary changes to the metadata definition. See "Metadata Definition Fields" on page 84.
- 5. Click the **Update** button ( $\square$ ) to save the changes.

#### 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 you changed the **Type** from HTML tag to Meta tag, the content blocks that use that metadata definition change to 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 can be easily removed from the Ektron CMS200/300 Web site. When you delete a metadata definition, it is removed from every content block that uses it on the Web site.

To delete a metadata definition, perform the following steps:

- 1. Access the view metadata definition page for the metadata definition, as described in "Viewing Metadata Definitions" on page 85.
- 2. Click the **Delete** button ( $\square$ ).
- 3. A confirmation message is displayed.
- 4. Click OK.
- 5. Another confirmation message is displayed.
- 6. 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 learn how to do this, please refer to the "Adding or Editing Metadata" section of the **Ektron CMS200/300** User Manual.

# **Setting Permissions**

Permissions determine which actions users and members of user groups can perform on content, library items, and content folders. For example, you allow your Webmaster to perform the most advanced actions, such as adding folders, editing folder properties, and deleting folders. At the same time, you could restrict content contributors to viewing, editing, and adding new content blocks.

You can set permissions for a content folder or a content block. If you assign permission to a content folder, it affects all of its subfolders unless you break inheritance for the sub-folders.

Only Ektron CMS200/300 administrators can set permissions.

You manage permissions through the Permission Table (illustrated

below), which appears when you click the Permission button (

View Permissions for Folder "abc"										
4 <mark>0</mark> ←										
<ul> <li>Allow this object to inherit permissions.</li> <li>The content in this folder is private and is NOT viewable on the public Web site.</li> </ul>										
View Advanced Permissions View MemberShip users										
User or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images			Overwrite Library
🖉 <u>admin</u>	×	Х	x	х	×	x	×	×	×	×
🔮 jedit	×	х	х							
🕵 <u>Administrators</u>	Х	Х	Х	х	х	х	х	х	х	х
🕵 <u>Everyone</u>	×									

This chapter explains how to manage permissions through the following subtopics.

- "Inheritance" on page 88
- "Standard & Advanced Permissions" on page 89
- "Setting Permissions for a Content Folder" on page 90
- "Setting Permissions for a Content Block" on page 93

# Inheritance

By default, all content folders and blocks inherit permissions from their parent folder. You have two options for modifying permissions.

- Modify the permissions of the parent folder see "Setting Permissions for a Content Folder" on page 90
- Break inheritance and add permissions to a folder

#### **Breaking Inheritance**

To break inheritance from the parent folder, follow these 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 90.
- 2. Remove the check mark from the box that says **Allow this object to inherit permissions**.
- 3. A confirmation message appears.
- 4. Click OK.

#### **Restoring Inheritance**

To restore inheritance for a content folder or content block, follow these steps.

- 1. Access the Permissions Table as described in "Accessing the Permissions Table" on page 90.
- 2. Place a check in the box that says **Allow this object to inherit permissions**.
- 3. A confirmation message appears.
- 4. Click OK.

# Standard & Advanced Permissions

There are two categories of permissions. You assign permissions in each category from a different screen.

- Standard Permissions basic functions
- Advanced Permissions administrator level functions

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

Category	Permission	Allows user/user group to perform this action on content in selected folder
Standard	Read Only	View content
	Edit	Edit content blocks
	Add	Add content blocks
	Delete	Delete content blocks
	Restore	Restore old versions of content blocks
	Library Read Only	View items in the corresponding library folder See Also: "Managing Library Assets" on page 102
	Add Images	Upload images to the corresponding library folder
	Add Files	Upload files to the corresponding library folder
	Add Hyperlinks	Add hyperlinks to the corresponding library folder
	Overwrite Library	Overwrite images and files the corresponding library folder
Advanced	Collections	Manage collections See Also: "Collections" on page 320
	Add Folders	Add sub folders
	Edit Folders	Edit folder properties See Also: "Folder Properties" on page 48
	Delete Folders	Delete the current folder or its subfolders

Category	Permission	Allows user/user group to perform this action on content in selected folder
	Traverse Folders	View the sub-folders under the main content folder. By default, the everyone user group has permission to view all sub-folders.

# Setting Permissions for a Content Folder

You can set permissions for any content folder from the Folder Properties page. Displayed here is the Permissions button on the Folder Properties page.



## Accessing the Permissions Table

To access the Permissions Table, follow these steps.

- 1. Select a folder from the left frame of the Workarea.
- 2. Click the Folder Properties button (<sup>11</sup>).
- 3. The Folder Properties screen appears.
- 4. Click the **Permissions** button( 骨 ).
- 5. The Permissions Table appears.

Allow this object	is folder is				NOT view	able on th	e public			
<u>iew Advanced Perm</u>	<u>nissions</u>							<u>Vie</u>	w Member	<u>Ship use</u>
lser or Group Name	Read Only	Edit.	Add	Delete	Restore	Library Read Only	Add Images			Overwrit Library
🔮 <u>admin</u>	х	х	х	х	х	х	×	х	×	×
🗟 izalit	×	х	х							
💐 jedit		×	×	х	х	×	х	х	×	х
Administrators	×	×	0							

#### Actions you can Perform from the Permissions Table

The following table summarizes actions you can perform from the Permission Table screen.

Action	How to perform it	For more information, see
View advanced permissions	Click <u>View Advanced</u> <u>Permissions</u>	"Standard & Advanced Permissions" on page 89
Add user or group to permission table	Click 🕂	"Adding a User or User Group to the Permissions Table" on page 91
Remove user or group from permission table	Click 🔟	"Deleting Users or User Groups from the Permissions Table" on page 93
View membership users	Click <u>View MemberShip users</u>	"Private Content & Memberships" on page 132
Have this folder inherit permissions from parent folder	Check box next to Allow this object to inherit permissions	"Inheritance" on page 88
Make content in this folder private	Check box next to The content in this folder is private and is NOT viewable on the public Web site	"Private Content" on page 132

# Adding a User or User Group to the Permissions Table

To add a user or user group to the Permissions Table, follow these steps.

Νοτε	Before adding users or groups, you must break inheritance. See "Inheritance" on page 88.
Νοτε	If a user and the user group to which that user belongs are both given permission to a folder, the user has all permissions to which he/she was assigned, as well as permissions assigned to the user group.
Νοτε	You can only assign Read Only permission to a Membership user or user group. See Also: "Private Content & Memberships" on page 132

- Access the Permissions Table for the content folder or content block, as described in "Accessing the Permissions Table" on page 90.
- 2. Click the Add button (
- 3. The Add Permissions page appears. Only users and groups not assigned to the Permissions Table appear.
- 4. Click a user or group to add to the Permissions Table.
- 5. The Add Permissions page appears.
- Check the standard and advanced permissions for the user or group. Refer to "Standard & Advanced Permissions" on page 89 for a description of permission options.
- **NOTE** Check Enable All to assign all standard permissions. If you do, you still must assign advanced permissions by hand.
  - 7. Click the **Save** button( $\blacksquare$ ).
  - 8. The page is refreshed, and the updated Permissions Table appears.

#### **Editing User or User Group Permissions**

To add or remove permissions for a user or group, editing the user or group in the Permissions Table. To do so, follow these steps.

- Access the Permissions Table for the content folder or content block, as described in "Accessing the Permissions Table" on page 90.
- 2. Click the user or group for which you want to edit permissions.
- 3. The Edit Permissions page appears.
- 4. To assign any permission, check the box. To remove any permission, uncheck the box.

NOTE F

- Remember to toggle between standard and advanced permissions.
- 5. Click the Update button ( $\blacksquare$ ).

## **Deleting Users or User Groups from the Permissions Table**

To remove permissions from a user or user group, use the delete button on the View Permissions window. To do so, follow these steps.

- Access the Permissions Table for the content folder or content block, as described in "Accessing the Permissions Table" on page 90.
- 2. Click the **Delete** button ( $\blacksquare$ ).
- 3. The Remove Permissions page appears.
- 4. Click the user or group to remove from the Permissions Table.
- 5. A confirmation message appears.
- 6. Click the **OK** button.
- **NOTE** When you delete the permissions of a user or user group, that change is propagated to all sub-folders and content. Also, if the user or group was part of an approval chain, they are removed from it.

# Setting Permissions for a Content Block

You can assign permissions to a single content block, overriding the default permissions inherited from the folder. To do so, follow these steps.

- 1. Access the content block by navigating to its folder and clicking on it.
- 2. Click the View Permissions (
  <sup>(1)</sup>) button.
- 3. Uncheck the box next to Allow this object to inherit permissions.
- 4. A confirmation message appears. Press OK.
- 5. You can perform any action on the content block that you can perform on a folder. These options are described in "Actions you can Perform from the Permissions Table" on page 91.

# **Setting Approval Chains**

# What is an Approval Chain?

An approval chain is a series of users or user groups who must approve a content block before it can be published on your Web site. When the last person in the chain approves a block, it goes live.

Also, if a user deletes a content block, before it can be removed from **Ektron CMS200/300**, everyone in the approval chain must approve the deletion.

An approval chain can include any number of users or user groups. However, to be eligible, a user or user group must have permissions to the content folder or content block. *See Also:* "Setting Permissions" on page 87

NOTE If you assign a user group to an approval chain, only one member of the group needs to approve the content, not all members.
 Also, if a user appears in an approval chain twice (both as a user and part of a user group), the approval chain skips the second approval because the user has already approved the content.

You can set up an approval chain for a content folder or a content block.

Finally, the Approval Method determines if a content block must be approved by all users in the chain, or only users higher up the chain than the one making the edits.

This chapter explains how to manage approval chains through the following subtopics.

- "Examples of Approval Chains" on page 95
- "Inheritance and the Approval Chain" on page 95
- "Editing the Approval Chain for a Content Folder" on page 95
- "Editing an Approval Chain For a Content Block" on page 99

"The Approval Method" on page 99

# Examples of Approval Chains

An approval chain lets you control how and when your Web site is updated. For example, if your Webmaster needs to approve every new content block or update of an existing block, he would be last user in every approval chain and exert total control over the site.

Alternatively, you could set up a less centralized organization, where each department head controls their section. To accommodate this, set up an approval chain for each department, and assign the department head as the last person in the chain.

On the opposite extreme, you can delete the default approval chain for a content block or folder. In this case, every content block in that folder is published as soon as a user submits it for publication.

# Inheritance and the Approval Chain

By default, every content folder and block inherits the approval chain from its parent folder. To modify an approval chain, you can either modify the parent's approval chain or break inheritance. This procedure is described in "Inheritance" on page 88.

# Editing the Approval Chain for a Content Folder

#### Viewing a Folder's Approval Chain

To view the approval chain for a folder, follow these steps.

- 1. Select the folder from the left frame of the Workarea.
- 2. Click the Properties button ( $\square$ ).
- Click the Approvals button ( ).

4. The approval chain appears.

View Approvals for the Folder "Support" ♣ — ৡ↓ 📝 ←

#### Approval Method:

Do Not Force All Approvers

User or Group Name	ID	Approval Order
🔮 jedit	2	1
😴 admin	1	2

This screen shows the following information about the approval chain.

- every user and user group in the approval chain
- the approval order
- the approval method (See also: "Changing the Approval Method" on page 100)
- buttons that let you modify the approval chain and method

#### Actions You can Perform from the Approvals Screen

From this screen, you can perform these actions.

Action	Butt on	See this section for details
Add approvers	₽	"Adding Approvers" on page 97
Remove approvers		"Deleting Approvers" on page 98
Change the order of users in the approval chain	₽↓	"Editing the Approval Order" on page 97
Change the approval method		"Changing the Approval Method" on page 100

### **Adding Approvers**

To add a user or user group to the approval chain, follow these steps.

- 1. Access the approval table as described in "Viewing a Folder's Approval Chain" on page 95.
- 2. Click the Add button (
- 3. The "Add Approvals" page appears.
- **NOTE** Only users and user groups with permissions to the folder appear. See "Adding a User or User Group to the Permissions Table" on page 91 for more information.
  - 4. Click the user or user group to add to the approval chain.
  - 5. A confirmation message appears.
  - 6. Click **OK**.
- Νοτε
- **TE** If you assign a user group to an approval chain, only one member of the group needs to approve the content, not all members.

### **Editing the Approval Order**

After you assign approvers to a folder, you may want to adjust the approval order. Place the user or group with final review at the end of the approval chain (that is, *the highest number*).

For example, if you have a content contributor whose edits must be approved by a department head, and the Webmaster has final review of all content, the approval order would look like this.

User or Group Name	Approval Order
Content contributor	1
Department Head	2
Webmaster	3

To edit the approval order, follow these steps.

- 1. Access the approval table as described in "Viewing a Folder's Approval Chain" on page 95.
- 2. Click the **Reorder** button  $( \frac{1}{2} \downarrow )$ .
- 3. The "Edit Approval Order" page appears.
- 4. Click the user or group whose approval order you want to change.



Using the arrows keys to the right, move the highlighted user or group within the approval order.



- 5. Click the **Up** (▲) or **Down** (▼) arrow to move the user or group to the desired order.
- Click the Save button ( ).

#### **Deleting Approvers**

**NOTE** If a user in an approval chain is deleted from the permissions table, he or she is automatically deleted from the approval chain.

To delete a user or user group from an approval chain, follow these steps.

- Access the approval table as described in "Viewing a Folder's Approval Chain" on page 95.
- Click the **Remove** button ( ).
- 3. The "Remove Approval" page appears.
- 4. Click the user or group that you want to remove from the approval chain.
- 5. A confirmation message appears.
- 6. Click **OK**.

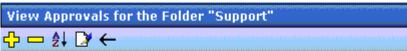
# Editing an Approval Chain For a Content Block

At times, you may need to change the approval chain for a specific content block. Use the Approvals button on the "View Content' page to change the approval chain for a content block.

## Viewing an Approval Chain For a Content Block

To view the approval chain for a content block, follow these steps.

- 1. Select the content block's folder from the left frame of the Workarea.
- 2. Select the content block from the right frame of the Workarea.
- 3. Click the **Approvals** button (
- 4. The block's approvals table appears.



#### Approval Method:

Do Not Force All Approvers

User or Group Name	ID	A
😴 jedit	2	
🖸 admin	1	

After viewing the block's approval chain, you can perform the same actions on it as a folder. This list of actions is available from "Actions You can Perform from the Approvals Screen" on page 96.

# The Approval Method

The Approval Method determines if a content block must be approved by all users in the chain, or only users higher up in the chain than the user making the edits.

Approval Method	Description		
Force All Approvers	All users in approval chain must approve the content, beginning with the first		
Do Not Force All Approvers	Approvers <i>after the user submitting content</i> in the approval chain must approve the content		

Two approval methods are available.

For example, assume the approval chain is set as below.

User or Group Name	Approval Order
Content contributor	1
Department Head	2
Webmaster	3

If the Approval Method is "Force All Approvers," and the Department Head submits content, the content must be approved by the content contributor, then the department head, and the Webmaster before it is published.

If the Approval Method is "Do Not Force All Approvers," and the Department Head submits content, the content must only be approved the Webmaster before it is published.

# **Changing the Approval Method**

By default, the approval method is set to "Do Not Force All Approvers." To change the approval method for a content folder or content block, follow these steps.

- 1. Access the approval table as described in "Viewing a Folder's Approval Chain" on page 95.
- 2. Click the Edit button ( []>).
- 3. The "Edit Approval Method" page appears.

- 4. Select an approval method by clicking the radio button.
- 5. Click the **Save** button ( $\blacksquare$ ).

# **Managing Library Assets**

Before users can insert images and files into their content, they must be uploaded to the server that contains **Ektron CMS200/300**. Each user, depending on their permissions, can upload images and files through the library in their workarea.

In the library, you determine the types of files that can be uploaded and each user's library permissions.

# What's In This Chapter?

The following topics are covered in this chapter:

- "Library Folders and Permissions" on page 102
- "Accessing The Library" on page 103
- "Folder Properties" on page 104
- "Performing Actions on Library Assets" on page 107
- "Searching Library Assets" on page 113
- "Load Balancing" on page 118
- "If You Have an Ektron WebImageFX License Key..." on page 122

# Library Folders and Permissions

Whenever a new content folder is created and permissions given to it, a corresponding new folder is created in the Library. The new folder inherits permissions from the content folder.

Items added to library folders are only accessible by users with permission to the corresponding content folder. If items are added to a library folders directly under the main Library folder, all users with at least Library Read- Only permissions can use those library items in their content block. Conversely, if an file or quicklink is uploaded to a folder to which only one person has permissions, that is the only user who can use that file or quicklink.

### **Types of Library Files**

Each library folder contains five types of files, listed below. To learn how a user inserts any file into Web content, see "Adding a Library Asset to Your Content" on page 111.

File Type	Description	
Files	External files (such as a Microsoft Word document) that can be inserted into Web content	
Forms	A quicklink to a form content block. (See Quicklinks below)	
Hyperlinks	A text string linked to a URL. For example, the text string is <b>Ektron, Inc.</b> , and the URL is www.ektron.com.	
Images	Images that can be inserted into Web content	
Quicklinks	<ul> <li>A internal URL to a content block in your Web site. It consists of:</li> <li>a content folder</li> <li>a template</li> <li>a content block id</li> <li>For example:</li> </ul>	
	/cms300sample/index.asp?id=16.	

# Accessing The Library

To access the library, follow these steps.

- 1. Access your Workarea.
- 2. Click the **Library** folder in the lower left frame.

3. The contents of the root library folder appear in the right frame, displaying top level folders in the main library folder.

<b>≡</b>	Library Folder: "Content"
🗁 Library	₩ 🕾 ←
Human Resources Marketing Products Support Syndication	Title          Title         files         forms         hyperlinks         images
	auicklinks
Content Conten	

To learn about the file types in the right frame, see "Types of Library Files" on page 103.

- The properties button (
  ) lets you determine which file types can be uploaded to each library folder, and change where and how images are uploaded to the server's file system. For more information, see "Folder Properties" on page 104.
- The search button ( ) lets you search for library assets. For more information, see "Searching Library Assets" on page 113.

# **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 permission to change the library properties.

## Accessing the Library Properties Page

To view the properties of the library folder, follow these steps.

- 1. Access a library folder, as explained in "Accessing The Library" on page 103.
- 2. Click the **Properties** button ( 1).
- 3. The Library Management window appears, displaying the following settings.

### The Library Management Settings

Field	Description
Image Extensions	The types of image files that a content contributor can upload to the library. You can add as many image file extensions as you want, or have none. If no extensions appear, no one can upload image files to the specified folder.
Image Upload Path	Where the uploaded images are saved on the Web server. By default, the image upload directory is Web root/CMS200/300Sample/uploadedimages.
Physical Path	The physical path on the file server where uploaded images are stored.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.
File Extensions	Specify the types of non-image files that a content contributor can upload to the library. You can add as many non-image file extensions as you want, or have none. If no extensions appear, no one can upload non- image files to the specified folder.
File Upload Path	Specifies where the uploaded files are saved on the Web server. By default, the file upload directory is Web root/CMS200/300Sample/uploadedfiles.
Physical Path	The physical path on the file server where uploaded images are stored.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.

# **Editing Folder Settings**

You can edit the file types that content contributors can upload, as well as image and file upload paths. To edit library settings, follow these steps.

- 1. Navigate to the library management window, as described in "Accessing the Library Properties Page" on page 105.
- 2. Click the Edit button ([]).

- 3. The Library Management page is displayed. To learn about the field, see "The Library Management Settings" on page 106.
- 4. Click the **Update** button (**I**) to save the settings.

# Performing Actions on Library Assets

The library is made up of images, files, form quicklinks, hyperlinks, and regular quicklinks that were 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	Form Quicklinks
Add	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
Edit	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
View	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
Overwrite	$\checkmark$	$\checkmark$			
Delete	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
Remove From Server	$\checkmark$	$\checkmark$			
Check Links	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
Update URL				$\checkmark$	$\checkmark$

The following sections explain how to perform these actions on library assets.

# **Uploading and Adding Library Assets**

To add a library asset to the Ektron CMS200/300 Web site, follow these steps.

- 1. In the administrator Workarea, browse through the library folders until you find a folder you want 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 can use that asset in their content blocks.

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

- 2. Click the folder for the type of asset you want to add.
- 3. The contents of the selected folder are displayed.
- Click the Add Library Item button ( III).
- 5. The Add Library Item screen appears.
- 6. Enter the necessary information for the asset you want to add.
- 7. Click the **Save** button ( ]).
- The library asset is saved and added to the Ektron CMS200/ 300 library.

### **Viewing Library Assets**

After a library asset is added to the library, you may view it. To view a library asset, follow these steps.

- 1. Navigate to the library folder that contains the asset you want to view.
- 2. Six sub-folders in the main section of the Workarea are displayed.
- 3. Click the folder for the type of asset you want to view.
- 4. The contents of the selected folder are displayed.
- 5. Click the **title** of the asset you want to view.
- 6. The View Library Item page appears.

# **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 want to edit as described in "Viewing Library Assets" on page 108.
- 2. Click the **Edit** button ( ) to edit the library asset.
- 3. The Edit Library Item page is displayed.
- 4. Make the necessary changes to the library asset.
- 5. Click the **Update** button (

## Library Link Checking

When viewing the properties page for any library asset, you can use a toolbar button to display a list of all content blocks that currently use that asset. Performing link checking is useful when you want to delete a library asset from your Web site. With the click of a button, you can see a list of content blocks that you need to update to reflect the change you are making to the asset.

#### Performing a Library Asset Link Check

To perform a library asset link check, follow these steps.

- 1. Access the "View Library Item" for any type of library asset, as described in "Viewing Library Assets" on page 108.
- Click the Check Links button ( ).
- 3. A search is performed, and a list of all content blocks that reference the library asset is displayed.

You should edit those content blocks before deleting the asset.

### **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 as the older image. Be sure that the two images have 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 point to the overwritten file now point to the new file.

#### **Overwriting Images and Flles**

To overwrite an image or file, follow these steps.

- Access the "View Library Item" page for the asset you want to overwrite, as described in "Viewing Library Assets" on page 108.
- Click the Overwrite button (<sup>1</sup>/<sub>2</sub>).
- 3. The Overwrite Library Item page is displayed.
- 4. Click the **Browse** button to select the path for the image/file.
- 5. The Choose File window opens.
- 6. Locate the image or file that will overwrite the existing one.
- 7. Click the file then click **Open**.
- 8. The Choose File window closes and the Overwrite Library Item page is displayed with the path to the new file in the text field.
- 9. If desired, click the **Preview** button ( ) to preview the file specified in the text field.
- 10. Click the **Update** button (
- 11. A confirmation message is displayed.
- 12. Click **OK**.

# **Deleting Library Assets**

You can delete obsolete assets from the library. By deleting an asset, you prevent users from adding it to their content. A deleted hyperlink, quicklink or form quicklink remains on your Web server, so any existing links to them are not broken.

On the other hand, if an asset is a file or image, the delete window displays an additional prompt, **Remove from the server**, that lets you remove the asset from the server. This feature is available to help reduce disk space taken up by these files. Before removing an image or file from your server, you should review all content blocks with links to it and remove or update the link. *See Also:* "Library Link Checking" on page 109

To delete an asset from the library, follow these steps.

- 1. Access the View Library Item page for the asset you want to delete, as described in "Viewing Library Assets" on page 108.
- 2. Click the **Delete** button ( m).
- 3. The Delete Library Item page is displayed.
- 4. If appropriate, check the box next to **Remove from the server** (see above).
- 5. Click the **Delete** button ( $\square$ ).

### Adding a Library Asset to Your Content

Once a library asset is added to the Ektron CMS200/300 library, users can add it to a content block. To add a library asset to a content block, follow these steps.

- 1. Invoke the editor by adding or editing a content block in Ektron CMS200/300.
- 2. Click the Library toolbar button (
- 3. The editor library opens in a new window.

4. Navigate through the library folders in the top left corner to the folder containing the library asset you want to insert.



- 5. In the right frame, click the sub-folder for the type of asset you want to insert.
- 6. The contents of the folder are displayed.
- **NOTE** If the asset you want to insert is not in the library, you can upload a file or image by using the lower right corner of the screen.
  - 7. Click the **Title** of the asset to be inserted.
  - 8. The selected asset is highlighted.
  - 9. Click the **Insert** button ( **(**)) in the editor library window.
  - 10. 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, the quicklink does get moved to the proper library folder. Once it is 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. in the Library, access the quicklinks folder containing quicklinks you want to update.
- Click the Update Quicklinks button ().

- 3. The Update URL Link Template quicklinks page is displayed.
- 4. Check the quicklinks you want to update.
- **NOTE** Check the box in the table header to select or deselect all.
  - 5. In the **To:** text field, enter the name of the template you want to apply to the selected quicklinks.
  - Click the Update Quicklinks button () to update the changes.

A confirmation message is displayed.

7. Click **OK** to continue.

The selected quicklinks are updated to use the template specified.

# Searching Library Assets

To find 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.

#### Searching via Library folder

To search the library assets via Library folder, follow these steps.

- 1. Access any library folder in the Workarea, as described in "Accessing The Library" on page 103.
- Click the Search button ( M).

3. The Search Library Folder page is displayed.

Search Library Folder ₩ ←

Er<mark>Search</mark>eyword(s):

Search

#### Search Options

• All types

- C Images only
- O Quicklinks only
- Form links only
- O Files only
- C Hyperlinks only

🗖 Filename search

- □ Only search items last edited by myself
- 4. 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. It is useful for searching by image filename, not title given to image).
Only search items last edited by myself	The search only finds library assets that were last modified by you.

5. Click the **Search** button ( ) or click the search button next to the **Enter Keywords** text field.

Either way, the search executes according to the criteria you set, and all items matching those criteria appear on the search results page.

6. Click the title link to view the properties of any item.

### Searching Library Assets via eWebEditPro Library

To search the library assets via editor library, follow these steps.

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

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

- **NOTE** When selecting a content block to search, keep in mind the permissions that are set on it, and which users have permissions to view the library.
  - 2. Click the Add Content button (
  - 3. The Add Content window opens.

🔓 😼 🖬 🗶		
Title:		
🗹 Add to Quicklinks tabl	le 🗹 Content Searchable	
Content Summary Me	etadata Schedule Comment	
📗 🛃 (Apply Style) 🔹 Ne	ormal 🔹 Verdana 💌 🕯	2 (10 pt) 🔹 🗛 🍫 🖪 🖌 🖳 A
X 🖻 🛍 📄 🗃 🛱 👭	n 🐴 🚭 👂 🗠 🖂 🚏 😐  ٨	* 🍓 🍓 🎒 🌳 🛛 – 🔛 🏈 🥅 🗑
∐ <b>A</b> x <sup>2</sup> x <mark>2</mark>   nbsp © ® TM	I€; ▼ 🛛 🖽 🖻 🔂 🔗 📗	三 任 律 律   圭 吾 君 〓 🗮 🤮

- 4. Click the library toolbar button from the editor toolbar.
- 5. The Library window appears.

6	
🗉 🕂 🗙	Library Folder: "Content"
Dibrary	₩ @ ←
Human Resources Marketing	<u>Title</u>
Products	🛅 <u>files</u>
🖲 🛅 Support	Entry forms
🖲 🛅 Syndication	hyperlinks
	images
	auicklinks
 P Content	
🖏 Forms	
🔝 Library	
🛄 Modules	
🥵 Settings	

7. Click the **Search** button ( 🏭 ).

8. The Search Library Folder page appears.

Search Library Folder ₩ ←

Ensearch syword(s):

Search

#### Search Options

• All types

- O Images only
- O Quicklinks only
- C Form links only
- O Files only
- C Hyperlinks only

🗆 Filename search

- Only search items last edited by myself
- 9. Use the following table to customize your library search.

Field	Description
Keywords	Specify the keywords that the search uses.
All Types	The search includes all library asset types.
Images only	The search only searches images.
Quicklinks Only	The search only searches quicklinks.
Form Links only	The search only searches quicklinks to form content blocks.
Files Only	The search only searches files.
Hyperlinks Only	The search only searches 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).

Field	Description
Only search items last edited by myself	The search results only display library assets that were last modified by you.

10. Click the **Search** button () or click the search button next to the **Enter keywords** field.

Either way, the search executes according to the parameters you set. All items matching those criteria appear on the search results page.

11. Click the title link to view the properties of the returned item

# Load Balancing

This section explains how to create load balancing paths in Ektron CMS200/300. For further information about the steps needed to set up load balancing outside of Ektron CMS200/300, see "Load Balancing" on page 437.

# Definition

Load balance is used for two important reasons:

- Provides the redundancy for the Web site if one server fails, a second server handles all requests
- Balances requests to the server distributes the load request across two or more machines

In both cases, the client (browser) is not aware that several servers are involved. All URLs point to a single Web site. The load balance software resolves them.

# Load Balancing and Ektron CMS200/300

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

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

**NOTE** Refer to "Load Balancing" on page 437 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. Access the library folder properties page, as described in "Load Balancing" on page 118.
- 2. Click the View Load Balance Settings button (
- 3. The View Library Load Balance Settings page is displayed.

The page has five columns. The following table describes each column.

Column Title	Description
Web Path	The path of the folder under your server's Web site.
Туре	<ul> <li>Images - load balance folder for uploaded images.</li> <li>Files - load balance folder for uploaded files.</li> </ul>
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. Access the view load balance settings page, as described in "Accessing Library Load Balancing Page" on page 119.
- 2. Click the **Add** button ( ) on View Library Load Balance Settings page.
- 3. The Add a Library Load Balancing Path page is displayed.

#### Add a Library Load Balance Path ☐ ←

• Images: This path is for image assets.

O Files: This path is for file assets.

#### Load Balance Path:

Make Directory Relative to this Web site: /CMS300Sample/

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.	Use the following	table to	help you	complete	the form.
----	-------------------	----------	----------	----------	-----------

5. Click the **Save** button ( **G**).

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:

- Begin by accessing the View Library Load Balance Settings page as described in "Accessing Library Load Balancing Page" on page 119.
- Click the Web Path of the load balance path you want to edit. The "Edit Library Load Balancing Path" is displayed.
- 3. Make the necessary changes to the load balance path.
- 4. Click the **Update** button (

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:

- Access the View Library Load Balance Settings page, as described in "Accessing Library Load Balancing Page" on page 119.
- 2. Click the **Remove** ( ) button.
- 3. The "Remove Library Load Balance Path" is displayed.
- 4. Check off the box(es) of the load balance paths you want to delete.
- Click the **Remove** button ( ) to delete the load balance path.
   A confirmation message is displayed.
- 6. Click OK.

# 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 is 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.

Ektron CM5300 Workarea for Application Administrator - Microsoft Internet Explorer			
Trans	Workarea		
<b>≡ ₽ x</b>	Library Folder: "Content\images"		
🚞 192.168.0.102/СМЕ			
	ID     Date Modified     Filename       RedStar Airplane smaller version     2     05-Sep-2002 05:46 PM /CMS300Samply		
Content	For information about acquiring an Ektron WebImageEX license key for Ektron		

CMS200/300, contact the Ektron Sales Department.

# Managing Users & User Groups

Users are people who administer the Web site, create content, or publish content. Without 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 Settings folder in Administrator Workarea.

Every Ektron CMS200/300 user belongs to a User Group. User groups are used when creating permissions and approvals for content folders. User groups can be departments in your company (Human Resources, Sales, Engineering) or indicate a user's role (Publishers, Administrators, Editors, etc.).

**IMPORTANT!** If your system uses the Active Directory Integration Feature, proceed to "Active Directory Feature" on page 509 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 perform on users and user groups.

These actions include:

- "Accessing the Users and User Groups Folders" on page 123
- "Creating A New User" on page 124
- "Viewing A User" on page 126
- "Assigning Users To User Groups" on page 129

### 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, follow these steps.

- 1. Access your administrator Workarea.
- 2. Click the Settings folder button in the lower left frame of the workarea window.
- 3. The folders tree under the Settings folder displays the folder hierarchy.
- 4. Click the **Users** folder from the folder tree.
- 5. 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 group folder in Ektron CMS200/300, follow these steps.

- 1. Access your administrator Workarea.
- 2. Click the **Settings** folder from the left frame of the workarea window.
- 3. The folders tree under the Settings folder displays the folder hierarchy.
- 4. Click the User Group folder.
- 5. 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.

# Managing Users

### **Creating A New User**

Before you can assign a user to a specific user group, you must add the user to the system.

To create a new user, follow these steps.

- 1. Access the User folder, as described in "Accessing the User Folder" on page 124.
- 2. Click the Add User button ( 🕵 ).
- 3. The Add a New User to the System page appears.
- 4. Enter the following information about the user.

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 in which the user will view Ektron CMS200/300. The dropdown list of choices is derived from the Language Settings page, available from the <b>Settings&gt;</b> <b>Configuration</b> folder. Do not confuse the system language with the user's ability to create and edit foreign versions of content blocks. This field has no effect on working with multiple language content blocks. <i>See Also:</i> "Multi-Language Support" on page 357 Note: Different languages are only supported after you download the Ektron CMS200/300 Language Support Program from Ektron, and translate the Web site.
E-mail Address	Enter the e-mail address of the user.

Select to disable the e-mail notifications for the user. If you do, the user will not receive the automatic email notification described in "Automatic eMail Notification" on page 459. However, this field has no effect on the user's ability to receive instant email.
See "Work Page Size" on page 32
See "Permission to Edit a Task" on page 376

5. Click the **Save** button( ]).

The View Users in Group Everyone screen appears with the new user included in the table.

- **NOTE** When you add a new user, he is automatically placed in the "Everyone" user group. To assign users to other groups, see "Assigning Users To User Groups" on page 129.
  - 6. Continue this process until you add all users of your Web site, or are allowed to depending on your license.
- **NOTE** Contact Ektron Sales for pricing of adding more Users to your license.

### Viewing A User

ΝΟΤΕ

After adding a user, you can view that information. While viewing a user, you can edit or delete the user.

To view a user, follow these steps.

- 1. Access the user folder as described in "Accessing the User Folder" on page 124.
- 2. Click 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 editing a user, you can change the username, first name, last name, password, user language, and email address. To edit a user, follow these steps.

- 1. Access the view user page of the user you want to edit as described in "Viewing A User" on page 126.
- 2. Click the **Username** of the user you want to edit.
- 3. The View User Information page is displayed.
- 4. Click the **Edit** button( ).
- 5. The Edit User page is displayed.
- 6. Make the necessary changes to the user information.
- 7. Click the **Update** button( ]).

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 want to delete as described in "Viewing A User" on page 126.
- 2. Click the **Username** of the user you want to delete.

The "View User Information" page is displayed.

3. Click the **Delete** button( $\boxed{\Pi}$ ) 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. Also, you cannot remove users from the Everyone or Admin user groups.

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 124.
- 2. Click the title of the User Group that contains the user that you want to remove.

A list of users that are members to the selected group is displayed.

3. Click the username of the user you want to remove from the user group.

The "View User Information" page is displayed.

4. Click the **Delete** button(1) 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

# **Creating A New User Group**

To create a new User Group in Ektron CMS200/300, follow these steps.

- 1. Access the User Groups folder in the administrator Workarea, as described in "Accessing the User Group Folder" on page 124.
- 3. The Add a New User Group to the System page is displayed.
- 4. Enter the name and a brief description of the user group that you want to create.
- 5. Click the **Save** button( ]).
- 6. The View User Groups screen appears with the new user group added to the table.

## **Assigning Users To User Groups**

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

- 1. Access the User Groups folder in the administrator Workarea.
- 2. Click the name of the user group to which you want to add a user.
- 3. The View Users in Group page is displayed with all users who currently belong to the group.

**NOTE** When you create a new user group, no user assigned to it initially.

- Click the Add User button ( Solution ).
- 5. A list of users that do not belong to the group appears.
- 6. Click the **Username** of the user that you want to add to the group.
- 7. A confirmation message is displayed.
- 8. Click OK.

The selected user is now a member of the selected group.

9. Continue this process until you add all users into User Groups.

To learn about the task fields in the lower section of the screen, see "Permission to Edit a Task" on page 376.

### 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 124.
- 2. Click the user group whose members you want to view.

The View Users in Group page appears with a list of users who are members of the group.

From this page, you can edit or delete user groups, as well as add and remove users to and from the user group.

You can also assign task permissions to the group by checking the boxes illustrated below.

View Users in Group "Administrators"				
-> 🛃 🖬 🔕		ni teru teru teru teru teru teru teru teru	s to be rules to be rules to be rules	u les la testa testa
<u>Username</u>	<u>Lastname</u>	<u>Firstname</u>	Language	
🔮 <u>admin</u>	Administrator	Application	App Default	
🔮 Username	Create Task	Redirect Task	Delete Task	
Administrators				)

# **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:

- Accessing the View Users in Group page for the user group you want to edit, as described in "Viewing the Users in a User Group" on page 130.
- 2. Click the title of the User Group you want to edit.
- 3. The View Users In Group page is displayed.
- 4. Click the **Edit** button ( $\bigcirc$ ).
- 5. The Edit User Group page is displayed.
- 6. Make the necessary changes.
- 7. Click the **Update** button(

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:

- Access the View Users in Group page for the user group you want to delete, as described in "Viewing the Users in a User Group" on page 130.
- 2. Click the User Group you want to delete.
- 3. The View Users In Group page is displayed.
- 4. Click the **Delete** button (1) to delete the user group.

A confirmation message is displayed.

5. Click **OK**.

The User Group is deleted from the Ektron CMS200/300 Web site.

# **Removing Users from User Groups**

See "Removing Users from User Groups" on page 128.

# **Private Content & Memberships**

Νοτε

This feature is not available with Ektron CMS200. 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 only viewable by users logged in to the Ektron CMS200/300 Web site *and* have *at least* Read-Only permissions for the content block or folder.

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

To set a content folder to be private, follow these steps.

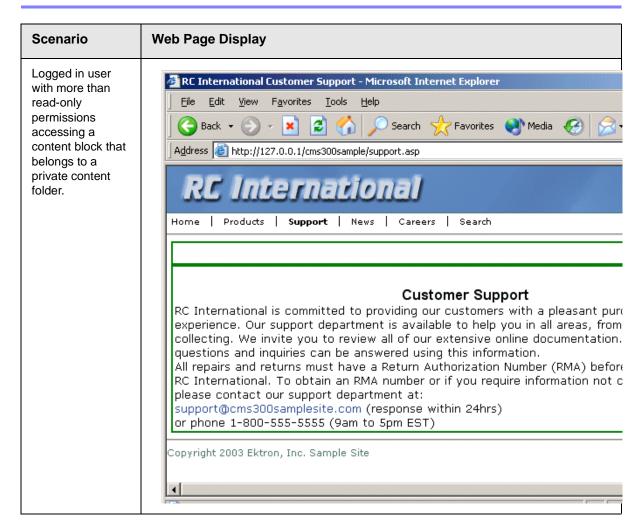
- Access the permissions table for a content folder or content block in your Workarea, as described in "Setting Permissions" on page 87.
- 2. Check the box that says **This content in this folder is private** and is NOT viewable on the public Web site.
- 3. A confirmation message is displayed.
- 4. Click OK.

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

The following table displays three scenarios placed on the same content block.

Scenario	Web Page Display
Web site visitor accessing a content block in a private content folder.	http://127.0.0.1/cms300sample/support.asp - Microsoft Internet Explorer          Ele       Edit       Yew       Favorites       Tools       Help         Search       Search       Favorites       Media       Search         Address       Intp://127.0.0.1/cms300sample/support.asp         RC       Internet Constant         Home       Products       Support       News       Careers       Search         Copyright 2003       Ektron, Inc. Sample Site

Scenario	Web Page Display
Logged in user with read-only permissions accessing a content block that belongs to a private content folder.	RC International Customer Support - Microsoft Internet Explorer         File       Edit       Yiew       Favorites       Tools       Help



# **MemberShips**

### What are Membership Users or User groups?

Users and user groups are given membership status when you want to allow them to view private content after login. When a membership user logs into Ektron CMS200/300, he can only view content -- all regular functionality is disabled.

By default, a membership user can view all public content on the Ektron CMS200/300 sample site, whether he is 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 a

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 132

## Membership User/User Group Example

A typical membership scenario might be a "Partner" section of your Web site. This section contains private content that only partners can view. However, you don't want partners performing any Ektron CMS200/300-related activities except viewing the content.

In this scenario, a membership user group could consist of several membership users from your partner's organization. This membership user group is given read-only permissions to the "Partner" section, which contains private content.

Any partner 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, click the **Modules** folder button.
- 3. Modules folder hierarchy is displayed
- 4. Click the **Membership** folder to view its sub-folders.

Folder Name	More Information
Users	"Membership Users" on page 137
User Groups	"Membership User groups" on page 139

# **Membership Users**

The following sections explain all actions 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 136.
- 2. Click the Add Membership User button ( 5. ).

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 the **Save** button (**G**) 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 140.

# **Setting Permissions on Private Content for Membership Users**

See "Assigning Permissions for Memberships" on page 142.

# **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 136.
- 2. Click the username of the user you want 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 want to edit as described in "Viewing Membership User Information" on page 138.
- 2. Click the Edit button ([]).

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 the **Update** button (,) 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 want to edit as described in "Viewing Membership User Information" on page 138.
- 2. Click the **Delete** button ( T).

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 136.

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 the **Save** button (**I**) 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 136.
- 2. Click the user group name of the membership user group you want 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 want to add a membership user to as described in "Viewing Membership Users in a Membership User group" on page 140.
- Click the Add Membership User button (K).

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 the username of the membership user you want 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 142

## **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 want to edit as described in "Viewing Membership Users in a Membership User group" on page 140.
- Click the Edit button (
  ).

The "Edit User Group" page is displayed.

- 3. Make the necessary changes to the Membership user group name.
- 4. Click the **Update** button (**[]**) 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:

- Access the view membership user group page for the membership user group that contains the membership user you want to delete as described in "Viewing Membership Users in a Membership User group" on page 140.
- 2. Click the username of the membership user you want to remove from the membership user group.

The "View User Information" page is displayed.

3. Click the **Delete** button ( **1**).

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:

- Access the view membership user group page for the membership user group you want to delete as described in "Viewing Membership Users in a Membership User group" on page 140.
- 2. Click the **Delete** button ( T ).

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 want to assign membership permissions for.

For a	See
Content Folders	"Setting Permissions for a Content Folder" on page 90
Content Blocks	"Setting Permissions for a Content Block" on page 93

- 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 **View MemberShip Users** on the right end of the permissions table.
- 5. The membership users/user groups added to the permissions table are displayed.
- 6. Click the Add button (
- 7. The "Add Permissions" page is displayed.
- Click 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.
- 9. Check **Read-only** if you want the membership user or user group to be able to view the private content when logged in.
- 10. Click the **Save** button ( ]).

The membership user or user group is saved and added to the permissions table.

# **Special Features**

This chapter will look at Ektron CMS200/300 special features. You will learn about:

- "Using eWebEditPro" on page 145
- "Managing XML" on page 146
- "Working with XML Forms" on page 192
- "Working with HTML Forms" on page 249
- "Ektron CMS200/300 Help" on page 282
- "Font Manager" on page 284
- "Managing Tasks" on page 289
- "Collections" on page 320
- "Menu Feature" on page 331
- "Calendars" on page 333
- "Multi-Language Support" on page 357
- "Microsoft SharePoint Portal Server Integration" on page 371
- "Plumtree Portal Support" on page 409
- "Web Services" on page 429
- "Syndicating Web Content as RSS" on page 430
- "JavaScript Syndication" on page 431
- "Load Balancing" on page 437
- "E-Mail Features" on page 459
- "Search" on page 465

# Using eWebEditPro

The following image displays the editor supplied with Ektron CMS200/300, eWebEditPro+XML.

đ	🖹 Ektron CM5300 Edit Content - Microsoft Internet Explorer			
	Edit Content			
	🗃 📴 🗞 🖣 🖬 🗙			
	Title: Home Page Content			
	Comment: This is what the user will see when they visit our sample			
	Start Date: End Date:	10		
	🛛 🛃 (Apply Style) 🔹 Normal 🔹 Verdana 🔹 2 (10 pt) 🔹 🛕 🍓 🖪 🖌 🖳 A			
	X ⓑ ⓑ B B ⓑ A ª <i>몰</i> ♀ ♀ ♀ ♥ ≝ ≯ & ŷ []) �   - Z 2 ♥ Щ   🗹			
	Welcome to RC International!			
	RC International is dedicated to the RC racing enthusiasts! We eat, work, play, and livi short years RC International has become one of the leading manufactures of RC racing Our dedication to the sport, and the enthusiasts who play it, has endeared our produc community. We will continue striving to improve our affordable products and hope you International member.	and flying vehicles.		

For more information about using the editor supplied with Ektron CMS200/300, please refer to the Ektron CMS200/300 User Manual, Version 4.7, Revision 1.

# Managing XML

#### Νοτε

This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

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 tedium 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...

- "Creating XML Configurations" on page 178
- "Indexing XML Configurations" on page 172
- "Assigning XML Configurations" on page 154
- "Viewing XML Configurations" on page 157
- "Editing XML Configurations" on page 164
- "Editing Data Design Package" on page 161
- "Creating XML Configurations Based on Existing Configurations" on page 167
- "Viewing Data Designer XSLTs" on page 170
- "Deleting XML Configurations" on page 172

# 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 actions to make this process easier. The following table describes all the buttons, and their actions, that you will come into contact with while working with XML configurations.

Button	Name	Description	More Information
<b>X</b> ,	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 149
÷	Back	Sends you to the previous page.	
¢%	Configure Full Text Search	Allows you to index your XML configurations.	
Û	Delete	Used to delete an XML configuration.	"Deleting XML Configurations" on page 172
	Edit	Used to edit an XML configuration.	"Editing XML Configurations" on page 164
12	Edit Data Design	Opens the Ektron CMS200/300 XSLT data designer page.	"Editing Data Design Package" on page 161
	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 170

# **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 Work Area" on page 11.
- 2. In the folder tree on the left side of the workarea, follow the path **Settings > Configuration > XML Configuration**.
- 3. The "View XML Configurations" page is displayed.

View XML Configurations		
<b>X</b>		
<u>Title</u>	ID Date Modified Last Editor	
<u>Job Postinas</u>	3 1-2002-11 4:08:55 Administrator, Application	
RC Cars	1 1-2002-11 4:08:19 Administrator, Application	
<u>RC Planes</u>	2 1-2002-11 4:08:44 Administrator, Application	
	From the View XML Configurations name you can view or	

From the View XML Configurations page, you can 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 want.

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 149.
- 2. Click the Add XML Configuration button ( 🔀 ).
- 3. The Add XML Configuration page is displayed.
- 4. Type in a title for the XML configuration.
- 5. Click the Save button ( 🔚 ).
- 6. The XML configuration data designer page is displayed.

7. 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.

8. Design your XSLT in the data designer.

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

9. Click the Update button (

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 154 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 149.
- 2. Click the Add XML Configuration button ( 🔀 ).

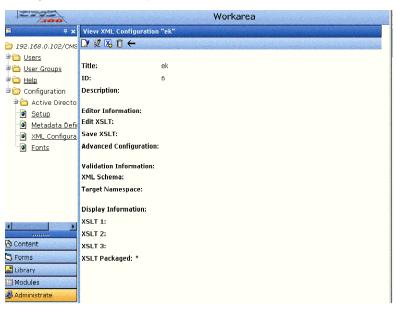
The "Add XML Configuration" page is displayed.

- 3. Type in a title for the XML configuration.
- 4. Click the **Save** button ( 🔚 ).

The XML configuration data designer page is displayed.

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

6. The "View XML Configuration" page for the new XML configuration is displayed.



7. Click the **Edit** button (  $\boxed{2}$  ).

The "Edit XML Configuration" page is displayed.

8. 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.

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

#### Default:

0	XSLT 1:	xslt/rc_jobs_display.xsl	Ľ
$\odot$	XSLT 2:	xslt/rc_jobs_display2.xsl	Ľ
0	XSLT 3:	xslt/rc_jobs_display3.xsl	Ľ
0	XSLT Packa	ged:	

10. Click the **Save** button ( **D**) 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 toolbar button ( []) is displayed.

After you enter the file name for the XSLT or schema, you can Click this toolbar button 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 toolbar button.

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

**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?

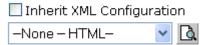
Ektron CMS200/300 has three locations where an XML configuration can be assigned.

Location in Ektron CMS200/300	See Also
"Edit Folder Properties" page	"Folder Properties" on page 48
"Add Sub-folder" page	"Adding Sub-Folders" on page 52
"View Properties for the Content" page	"Content Properties" on page 66

In each location, 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:



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 option 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 156 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:

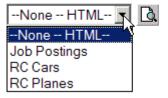
- 1. Access the XML configuration setting form as described in "Where Can XML Configurations be Assigned?" on page 155.
- 2. If the "Inherit XML Configuration" box is checked off, remove the check by clicking on the box.

See "Inheriting an XML Configuration" on page 155 for additional information.

 Click 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



- **NOTE** See "Adding a New XML Configuration" on page 149 for more information about adding XML configurations.
  - 4. From the list, Click the XML configuration you want 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 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 the (X) button to close the window.

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

7. Click the **Update** button ( **I**) to save and update the changes.

When assigning XML configuration to a sub-folder, Click the **Save** button ( **D**) to save the changes.

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

# Viewing XML Configurations

After accessing the View XML configurations page, you can view each XML configuration. To view an XML configuration:

1. Access the view XML Configurations page as described in "Accessing XML Configurations" on page 149.

View XML Configurations		
<b>X</b>		
<u>Title</u>	ID Date Modified Last Editor	
<u>Job Postings</u>	3 1-2002-11 4:08:55 Administrator, Application	
RC Cars	1 1-2002-11 4:08:19 Administrator, Application	
<u>RC Planes</u>	2 1-2002-11 4:08:44 Administrator, Application	

2. Click the title of the XML Configuration you want to view.

X	
<u>Title</u>	ID Date Modified
<u>Job Postings</u>	3 1-2002-11 4:
<u>Multi-Language</u>	4 27-2003-10 5
<u>RC Cars</u>	1 1-2002-11 4:
<u>RC Planes</u>	2 1-2002-11 4:

The view XML Configuration page appears with a more detailed description of the configuration.

XML Configuration Created with		
Data Designer	External Files	
View XML Configuration "RC Cors"         192.168.0.102/CME         1000000000000000000000000000000000000	Image: State in Sta	

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

XML Configuration Created with	
Data Designer	External Files
<ul> <li>"General Information" on</li></ul>	<ul> <li>"General Information" on</li></ul>
page 159	page 159
<ul> <li>"Data Design Package"</li></ul>	<ul> <li>"Editor Information" on</li></ul>
on page 160	page 160
<ul> <li>"Display Information" on</li></ul>	<ul> <li>"Validation Information" on</li></ul>
page 161	page 161
	<ul> <li>"Display Information" on page 161</li> </ul>

Each section is 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.

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
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 "Creating XML Configurations Based on Existing Configurations" on page 167 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 149.

View XML Configurations		
<b>X</b>		
<u>Title</u>	ID Date Modified Last Editor	
<u>Job Postings</u>	3 1-2002-11 4:08:55 Administrator, Application	
RC Cars	1 1-2002-11 4:08:19 Administrator, Application	
<u>RC Planes</u>	2 1-2002-11 4:08:44 Administrator, Application	

2. Click the title of the XML Configuration you want to view.

X		
Title	ID Date Modified	
<u>Job Postings</u>	3 1-2002-11 4:	
<u>Multi-Language</u>	4 27-2003-10 5	
RC Cars	1 1-2002-11 4:	
RC Planes	2 1-2002-11 4:	

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

222	Workarea		
		RC Cars"	<u></u>
🚞 192.168.0.102/CMS	🕑 🗹 😼 📾 🗊 🔶		
B Content	Title: RC Cars		
	ID: 1		
	Description: Configuration for the cars s	ection	
	Preview XSLT on the emp	ty XML document:	
	RC Cars		
	Product Name:		
	Description:		
	Specifications		
<li>I</li>	Overall Length: Wheelbase:	inches inches	
A Content	Weight:	lbs (w/o battery)	
S Forms	Tire Type:		
	Battery:		
🔜 Library	Battery Life: Recharge Time:	minutes (min.) minutes quick charge	
III Modules	Color:	Red Black Yellow Silver	

3. Click the **Data Design Mode** button ( 12) at the top of the page.

The edit data design package page is displayed with the current package displayed in the editor.

🧯 Ektro	on CMS300 Edit Content "Application Administrator" - Microsoft Internet Explorer	_ 🗆 ×
		· · · · ·
Title:	Job Postings	
and the second data was not second as a second s	a style sheet that you wish to apply for this design	
	lect a style sheet — 🔄	
<b>∦</b> % ⊑	ba 🛍 🛱 🗛 🕰 😂 🗠 ↔ 💖 😻 🕕 🍓 🍓 🚺 🗕 🔜 🏛 🕺 nbsp @ @ TM € i 🕞	
1 😼 🛛	Apply Style) - Normal - B I U A x <sup>2</sup> x <sub>2</sub>	
12 5	え 注注注 律律 医毒素素 ●	
[ <sup>xy</sup> ] F		
	Job Title:	
ab	Job Number:	
	Description:	
	The successful candidate must possess following attributes:	
	The successing canadrate mass possess following an nonces.	

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 the **Update** button ( **I**) 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 149.

View XML Con	figurations
X,	
<u>Title</u>	ID Date Modified Last Editor
<u>Job Postings</u>	3 1-2002-11 4:08:55 Administrator, Application
RC Cars	1 1-2002-11 4:08:19 Administrator, Application
<u>RC Planes</u>	2 1-2002-11 4:08:44 Administrator, Application

2. Click the XML configuration you want to edit.

<b>X</b> ,	
<u>Title</u>	ID Date Modified
<u>Job Postings</u>	3 1-2002-11 4:
<u>Multi-Language</u>	4 27-2003-10 5
<u>RC Cars</u>	1 1-2002-11 4:
<u>RC Planes</u>	2 1-2002-11 4:

3. The view XML configuration page is displayed.

Data Designer		External	Files	
200	Workarea	IZ ZZ		tor-Microsoft Internet Explorer Workarea
		E → ×	View XML Configuratio	on "Test"
Content	Title: RC Cars ID: 1 Description: Configuration for the cars section Preview XSLT on the empty XML document:	in the content	Title: 1D: Description: Editor Information: Edit XSLT: Save XSLT:	Test 5 /CHS300Sample/XmlFiles/xstlrtc_cars_edit.xsl /CHS300Sample/XmlFiles/rstlrtc_cars_save.xsl file:/CHS300Sample/XmlFiles/rc_jobs_xmlinfo.asp
	Product Name: Description:	∢►	XML Schema: Target Namespace: Display Information: XSLT 1: * XSLT 2: XSLT 3:	/CM5300Sample/XmlFiles/schema/rc_poss_schema.xsd /CM5300Sample/XmlFiles/xslt/rc_cars_display.xsl
	☐ Specifications	- Forms	XSLT 3: XSLT Packaged:	

4. Click the **Edit** button at the top of the page.

2

The edit XML configuration page is displayed.

a Designer	External Files
NSS00 Workarea lor Application Administrator = Nicrosolt Internet Explorer	Workarea
x Edit XML Configuration "Job Postings"	
2.169.0.102/0x6  Title: Job Postings ID: 3 Description: [Configuration for the HR department Display Information: (Files prefixed with/CMS300Sample/XmiFiles/) Default:  C XSLT 1: xstWc_jobs_displey2xs1 C XSLT 2: xstWc_jobs_displey2xs1 C XSLT 3: xstWc_jobs_displey2xs1 C XSLT Packaged:	Image: Second and Second
And the state of t	Image: Second

- 5. Edit the necessary fields to update the XML configuration.
- 6. Click the **Update** button 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 toolbar button is displayed.

Ľ

Once you have entered the file name for the XSLT or Schema, you may Click this toolbar button 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 toolbar button.

Display	Result	Description	
	Verified	The file passes all verification parameters.	
2			
	Not Verified	The file either:	
X		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 149.

View XML Configurations			
<b>X</b> ,			
<u>Title</u>	ID Date Modified Last Editor		
<u>Job Postings</u>	3 1-2002-11 4:08:55 Administrator, Application		
RC Cars	1 1-2002-11 4:08:19 Administrator, Application		
<u>RC Planes</u>	2 1-2002-11 4:08:44 Administrator, Application		

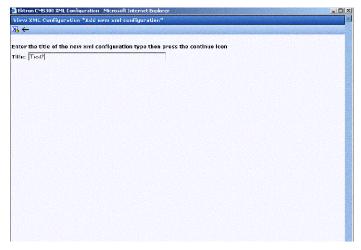
2. Click the title of the XML Configuration you want to view.

<b>X</b>	
<u>Title</u>	ID Date Modified
<u>Job Postings</u>	3 1-2002-11 4:
<u>Multi-Language</u>	4 27-2003-10 5
<u>RC Cars</u>	1 1-2002-11 4:
<u>RC Planes</u>	2 1-2002-11 4:

3. The view XML Configuration page appears with a more detailed description of the configuration.

222	Workarea				
₽ <b>.</b> .	View XML Configu	ration "RC Cars"			
🍅 192.168.0.102/СМS	D 🛛 🖉 🔀 🖻 🗊	÷			
Content					
	Title:	RC Cars			
	ID:	1		l	
	Description: Configuration for th	ne cars section		Contraction of the	
	Preview XSLT on	the empty XML doc	iment:	a data a sur	
	-RC Cars-				
	Product Name:				
	Description:				
	Specifications			South Real	
-	Overall Length:		inches -		
	Wheelbase:		inches		
👌 Content	Weight:		lbs (w/o battery)		
🕽 Forms	Tire Type:				
	Battery:		and a second and a second s		
🛃 Library	Battery Life: Recharge Time:		minutes (min.) minutes quick charge		
🔢 Modules	Color:		Red F Black F Yellow F Silver		
Administrate	Color:		I Red I Black I Yellow I Silver		

- 4. Click the **Create New XML Configuration** button ( **K**) to create a new XML configuration based on this XML Configuration.
- 5. The Add XML configuration page is displayed.



6. Enter a title for the new XML configuration in the field provided,

then Click the **Add XML Configuration** button ( **I**) in the toolbar at the top of the page.

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

2775		Workarea	
	View XML Configuration "RC C	ars"	-
) 192.168.0.102/CMS	🕑 🕅 😼 📾 🗊 🔶		
Content			
	Title: RC Cars		
	ID: 1		
	Description:		
	Configuration for the cars section	n	
	Preview XSLT on the empty XM	IL document:	
	RC Cars		
	No cars		
	Product Name:		
	Product Name:		
	Description:		
	Specifications		
	Overall Length:	inches	
<u> </u>	Wheelbase:	inches	
Content	Weight:	lbs (w/o battery)	
Forms	Tire Type:		
and the second	Battery:		
Library	Battery Life: Recharge Time:	minutes (min.) minutes quick charge	
Modules	Color:	Red Black Vellow Silver	
Administrato			24522622552

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 149.

View XML Configurations				
<b>X</b> ,				
<u>Title</u>	ID Date Modified	Last Editor		
<u>Job Postings</u>	3 1-2002-11 4:08:	55 Administrator, Application		
RC Cars	1 1-2002-11 4:08:	19 Administrator, Application		
<u>RC Planes</u>	2 1-2002-11 4:08:	44 Administrator, Application		

2. Click the title of the XML Configuration you want to view the XSLT of.

<b>X</b>	
<u>Títle</u>	ID Date Modified
<u>Job Postings</u>	3 1-2002-11 4:
<u>Multi-Language</u>	4 27-2003-10 5
<u>RC Cars</u>	1 1-2002-11 4:
<u>RC Planes</u>	2 1-2002-11 4:

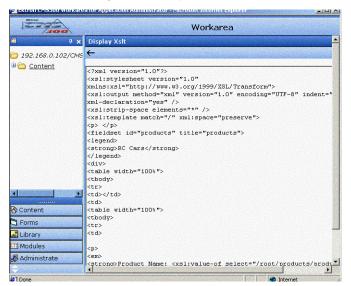
## Νοτε

The XSLT is only displayed if the XML configuration was created using the Data Designer.

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

	Workarea
	"RC Cars"
🕑 🕅 🔀 📾 🗊 ←	
Title: RC Ca	rs
ID: 1	
Description:	
Configuration for the cars	section
Preview XSLT on the em	pty XML document:
RC Cars	
Product Name:	
Description:	
Specifications	
Overall Length:	inches
Wheelbase:	inches
Weight:	lbs (w/o battery)
	minutes (min.)
	minutes (min.) minutes quick charge
Color:	Red Black Vellow Silver
	▶       ₽       ₽       ₽       ►         Title:       RC Ca       1         Description:       Configuration for the cars         Preview XSLT on the em         RC Cars         Product Name:         Description:         Specifications         Overall Length:         Wheelbase:         Weight:         Tire Type:         Battery:         Battery Life:         Recharge Time:

- 4. Click the View XSLT button ( 🔤 ) at the top of the page.
- 5. The View XSLT page is displayed.



Now you can use this information to create your display XSLT.

# Indexing XML Configurations

NOTE

XML indexing is only enabled with the purchase of a special license key. Contact Ektron sales for more information about purchasing an "XML Indexing" license key.

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 "XML Indexing" on page 175.

# **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 149.

View XML Configurations				
<b>X</b> ,				
<u>Title</u>	ID Date Modified	<u>ast Editor</u>		
<u>Job Postings</u>	3 1-2002-11 4:08:55 A	dministrator, Application		
RC Cars	1 1-2002-11 4:08:19 A	dministrator, Application		
<u>RC Planes</u>	2 1-2002-11 4:08:44 A	dministrator, Application		

## 2. Click the title of the XML configuration you want to delete.

<b>X</b> ,	
Title	ID Date Modified
<u>Job Postings</u>	3 1-2002-11 4:
<u>Multi-Language</u>	4 27-2003-10 5
<u>RC Cars</u>	1 1-2002-11 4:
<u>RC Planes</u>	2 1-2002-11 4:

3. The view XML configuration page is displayed.

XML Cor	nfiguration Crea	ted with			
Data Des	signer		External	Files	
	View XML Configuration "RC Cars"	Workarea	Ektron CMS300 Worka	rea for Application Administr	ratur - Microsoft Internet Explorer
	₀D*₩%26₽1←		300	View XML Configurati	
□ 192.168.0.102/CM 19	Title: RC Cars D: 1 Description: Configuration for the cars section Preview XSLT on the empty XML do RC Cars Product Name: Description: Specifications	scument:	i 192.168.0.102/CM ii	E 27 126 ℃ ← Title: ID: Description: Editor Information: Edit XSLT: Save XSLT:	Test 5 /CMS300Sample/XmiFiles/xslt/rc_cars_edit.xsl /CMS300Sample/XmiFiles/xslt/rc_cars_save.xsl 01: /CMS300Sample/XmiFiles/rc_jobs_xmirrfo.asp
Content Conte	Verrall Length: Wheelbase: Weight: The Type: Battery: Battery Life: Recharge Time: Color:	inches inches Ibs (w/o battery) minutes (min.) minutes (min.) E Det E Black E Vollaw E Silver	Content Forms	Visplay Information: VSLT 1: * XSLT 2: XSLT 3: XSLT 3: XSLT Packaged:	/CMS300Sample/XmlFiles/xslt/rc_cars_display.xsl

- 4. Click the **Delete** button at the top of the page.
- 5. The following confirmation message is displayed.

Microsof	t Internet Explorer
?	Are you sure you wish to delete this XML configuration? This may cause some XML data to render improperly.
	Continue?
	OK Cancel

Ш

6. Click 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 "Closing the Administrator Work Area" on page 28.

## **Enabling Indexing**

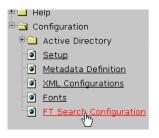
Once you have added your new license key, you can then enable indexing in the Ektron CMS200/300 workarea.

To enable indexing, perform the following steps:

- Insert your new license key into your Application Settings page as described in "Closing the Administrator Work Area" on page 28.
- 2. Save the application settings.

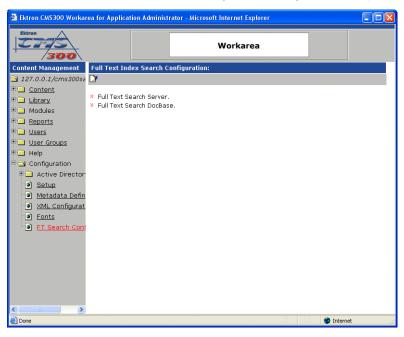
The new license key is saved, and the application settings page is displayed.

3. Click the **FT Search Configuration** option under the Configuration folder in the administrator workarea.



#### **NOTE** You may need to refresh the entire workarea for this option to appear.

The Full Text Index Search configuration page is displayed.



4. Click the **Edit** button ([]).

The edit Full Text Index Search configuration page is displayed.

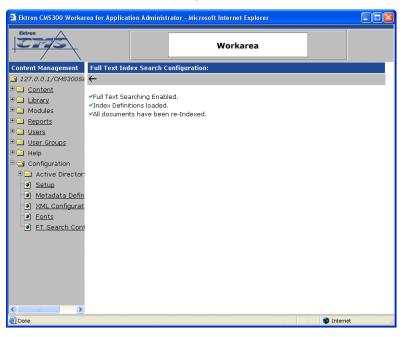
🖹 Ektron CMS300 Workarea for Application Administrator - Microsoft Internet Explorer 📃 🗖 🔀					
Ektron 300			Workarea		
Content Management		ex Search Configuration:			
127.0.0.1/cms300se Content	-→ 🖬				
<ul> <li>Library</li> <li>Modules</li> <li>Reports</li> <li>User Groups</li> <li>Help</li> <li>Configuration</li> <li>Active Director</li> <li>Setup</li> <li>Metadata Defin</li> <li>XML Configurat</li> <li>Fonts</li> <li>FT Search Conf</li> </ul>	Enable Ful	l Text Search			
< Done				🌍 Internet	

5. Check off the box to enable full text search.



6. Click the **Update** button (**[**]) 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

roduct Name:	
escription:	
Specifications	
Overall Length: Wheelbase:	inches
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 149.

# **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.

2275		Workarea
<b>₽ x</b>		
192.168.0.102/CMS	🕑 📝 🔀 📾 🗊 •	$\leftarrow$
<u>Content</u>		
	Title:	RC Cars
	ID:	1
	Description:	
	Configuration for th	e cars section
	Preview XSLT on t	he empty XML document:
	RC Cars	
	Product Name:	
	Description:	
	Specifications -	
Contraction of the local division of the loc	Overall Length:	inches
	Wheelbase:	inches
ontent	Weight:	lbs (w/o battery)
Forms	Tire Type:	
	Battery:	
ibrary	Battery Life: Recharge Time:	minutes (min.)
Aodules	Color:	minutes quick charge Red
Administrato		Red I Black I Yellow I Silver

- 2. The view XML configurations page is displayed.
- 3. Click an XML configuration that you want to index.

<b>X</b>		
Title	ID Date Modified	La
Job Postings	3 1-2002-11 4:08:55	Ad
<u>Multi-Language</u>	4 27-2003-10 5:29:26	Ad
<u>RC Cars</u>	1 1-2002-11 4:08:19	Ad
<u>RC Planes</u>	2 1-2002-11 4:08:44	Ad

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

12775			Workarea	
<b>≡</b>	View XML Config			
🛅 192.168.0.102/СМS	🕑 😥 🔀 🖻 🗊	÷		
🖻 🛅 Content				
	Title:	RC Cars		
	ID:	1		
	Description: Configuration for t	he cars section		
	Preview XSLT on the empty XML document:			
	-RC Cars			
	Product Name:			
	Description:			
	Specifications			
<  >	Overall Length:		inches	
	Wheelbase:		inches	
🔁 Content	Weight:		lbs (w/o battery)	
🕽 Forms	Tire Type:			
	Battery:			

5. Click the **Edit Full Text Search** button (*M*). The Configure Full Text Search page is displayed with all elements listed.

Configure Full Text Search //root/products/product-name //root/products/description //root/products/product-image //root/products/specifications/length //root/products/specifications/wheelbase //root/products/specifications/weight //root/products/specifications/tires //root/products/specifications/battery-type //root/products/specifications/battery-run //root/products/specifications/battery-recharge //root/products/specifications/red //root/products/specifications/black //root/products/specifications/yellow //root/products/specifications/silver

- //root/products/specifications/mtbf
- //root/products/specifications/date\_mfg

From here, you can configure your full text search settings. See "Indexing XML Configurations" on page 182 for additional information.

# Indexing XML Configurations

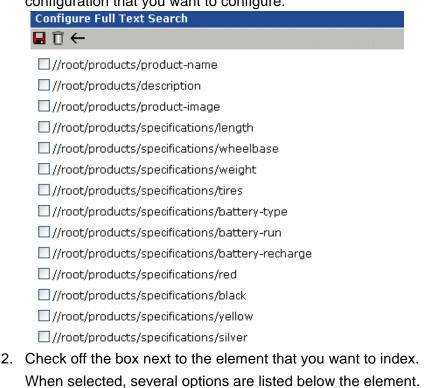
The following section explains how to index an XML configuration.

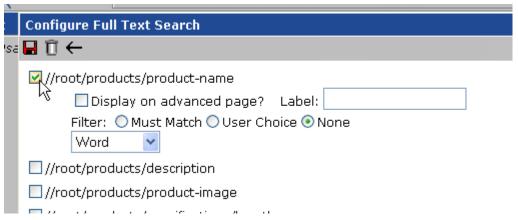
#### Selecting Elements to Index

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 want to configure.





The following table explains each option.

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 184

Attribute	Description	More Information
Label	If displayed on the advanced search page, the label is displayed for the advanced search option.	"Label" on page 184
Filter	Set the filter settings for the search option.	"Filter" on page 184
Data Type	Specify what kind of data the element is, as well as data type options.	"Data Type" on page 185

## 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	<ul> <li>Allows the user choices on the advanced search page for the element.</li> <li>Choices are automatically inserted according to the data stored in the element's XML tags.</li> <li>Additional options include:</li> <li>Drop down list</li> </ul>				
	Battery Type:  Nickel cadmium Nickel Metal Hydride (NiMH)				
	Radio buttons				
	Battery Type: 🔘 Nickel cadmium				
	🔘 Nickel Metal Hydride (NiMH)				
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.				
	• <b>Greater Than</b> - search only displays results that are greater than the integer specified.				
	• Less Than - search only displays results that are less than the integer speci- fied.				

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, -1.33333333, 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.				
	• <b>Greater Than</b> - search only displays results that are greater than the decimals specified.				
	• Less Than - search only displays results that are less than the decimal speci- fied.				
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.				
	• <b>Greater Than</b> - 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
I	Or	1	Cats   Dogs	the word "Cats" or the word "dogs".
+	And	2	Cats + Dogs the word "Cats" and the w "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.
ADJ	Adjacency	5	Cats ADJ4 dogs	the word "Cats" placed within 4 words of the word "dogs" in this order.

Symbol	Symbol Description	Priority	Example	This query retrieves all documents that contain
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 187 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:

				Fi	lter By:
Car Description:				] Help	
	From: 11		To: 20		
Length in inches:				]	
	Less Than: 5.00				
Weight in Ibs:					
Battery Type:			*		
	From: 11/21/2000		To: 2/15/2002		
Date Manufactured:					
	Search	Cle	ar		

The following explains this search page's options.

## **Car Description**

#### Web Site Display

	Filt	er By:
Car Description:	Help	

#### XML Index Settings

🗹 //root/pro	ducts/description	
🗹 Dis	play on advanced page?	Label: Car Description:
Filter:	🔘 Must Match 💽 User Ch	oice 🔘 None
Word	*	
Length in Inches		
Web Site D	isplay	

Fi Length in inches:	rom: 11	To: 20
XML Index Setting	S	
	pecifications/length	
🗹 Display or	n advanced page? I	Label: Length in inches:
	st Match 🔿 User Choi From To 🛛 👻	
Weight in Ibs		
Web Site Display		
	Less Th	an: 5.00
W	eight in Ibs:	
XML Index Setting	S	
✓ //root/products/s	pecifications/weight	
🗹 Display on	advanced page? L	abel: Weight in Ibs:
	t Match 🔘 User Choic	
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: O Must Match O User Choice O None Choices V Dropdown V
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 💙

# Working with XML Forms

Νοτε

This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

# 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.

🛛 👗 🖻 🛍 🛱 🕯	M M, 🚑   🗠 🗠   💖 🐽   🥕 🍓 🎭   — 🔜 🖽   🐴 📑    []
📗 🛃 (Apply Style)	<ul> <li>Normal</li> <li>Arial, Helvetica</li> <li>2 (10 pt)</li> <li>mbsp</li> </ul>
📗 🔤 🔽 🖬 🖬	
City:	State Massachusetts 💌
	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>

</address>

Note that the street and city fields accept text, while the state field accepts a pre-defined value (a state).

NOTEThe samples installed with Ektron CMS200/300 provide a good example of<br/>using the Data Designer. To try them out, click the Windows Start button (lower left<br/>corner of the screen) and follow this path: Start > Programs > Ektron ><br/>eWebEditPro4 > Samples > ASP > Data Design > ASP Data Design Sample.

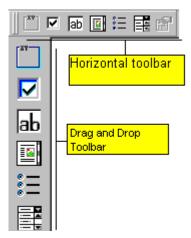
This section explains how to use the Data Designer feature through the following topics.

- "Differences in Ektron CMS200/300" on page 193
- "Design Mode vs. Data Entry Mode" on page 195
- "Designing a Screen" on page 195
- "Inserting a Field Type" on page 196
- "Sample Screen Design" on page 198
- "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.

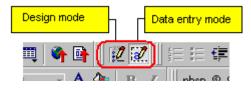


Both toolbars provide mostly the same buttons. The major difference between them is how you use the button to add a field to the screen. If you are using the *horizontal* toolbar, place the cursor where you want field, and click the toolbar button.

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 195.)



The Data Entry mode button lets you preview the screen being created.

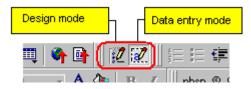
• several regular toolbar buttons are grayed out because they do not work with Data Designer

# Design Mode vs. Data Entry Mode

The Data Designer feature supplies two "modes," which make 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.



# **Designing a Screen**

For each field on the screen, select a field type, and place it on the screen. "Inserting a Field Type" on page 196 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.

🖻 🛍 🛱 🖊	🕰 🎒 🗠 🗠	🕴 😻 📝 😵 🖊	) 🤮 🌺 🛛 —	🔝 🧮 🗳 📑	≘⊟∉≢	
(Apply Style)	▼ Normal	👻 Arial, Helvetica	✓ 2 (10 pt)	– 🗛 🍖 🖪 .	$I \square A = x^2$	∥nbsp © ® TM € <sub>j</sub> i

sic Information tures of Property:



#### cription:

floor unit w/ balcony and one deeded garage space and central air

_S# 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 let you insert or edit fields in the editor. Each field type is described below.

Field type	lcon	Description	For more information, see
Group Box	abc ( <u>XY2L</u> B	Groups related fields, which can be surrounded by a box and have a caption	"Group Box ()" on page 204
Checkbox	ব	User's response is either checked or unchecked	"Checkbox ()" on page 208

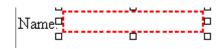
Field type	lcon	Description	For more information, see
Plain Text	ab	Free text field; user cannot format text	"Plain Text()" on page 209
Rich Area		Free text field; user can format text using the editor	"Rich Area ()" on page 214
Choices	*     *   *	Several choices appear on screen. User checks appropriate boxes. All user choices are inserted as values within single XML tag.	"Choices ()" on page 216
List		Same as Choices except options appear in a drop-down box	"Select List ()" on page 220
Calculated		Performs calculations using other fields on the screen	"Calculated Field ()" on page 223
Calendar		Lets user insert a date by clicking a calendar	"Calendar Field ()" on page 234
Image Only		Lets user insert an image	"Image Only Field ()" on page 236
File Link	ļ,	Lets user insert a link to a file, such as a PDF document	"File Link Field ()" on page 238
Field Properties	ř	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	
Validate	₿ <b>∕</b>	Ensure the screen contains valid XML.	

# **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.

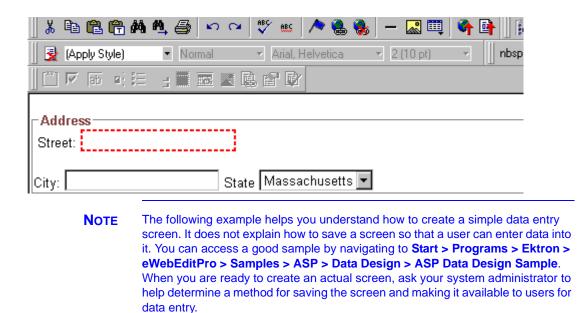


4. Click the cut icon  $(\frac{1}{2})$  to remove the field.

Usually, the field label is not deleted when you delete a field. To delete the label, use standard 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.

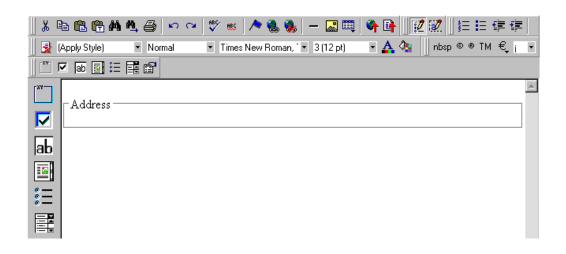
1. Since you want to surround the data entry fields with a box and

a caption, drag the Group Box button  $\left( \begin{bmatrix} \frac{1}{2} & \frac{1}{2} \\ \frac{1}{2} & \frac{1}{2} \end{bmatrix} \right)$  from the drag and drop toolbar onto the screen. Then, complete the dialog as shown below.

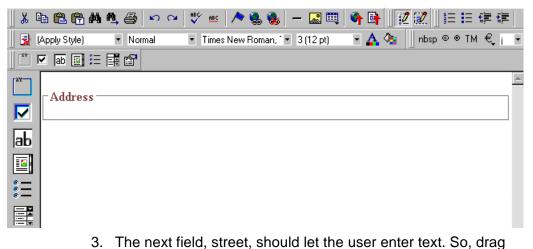
Group Box		х
Nam <u>e</u> :	Address	
<u>D</u> isplay name:	Address	
Use May not be removed May be removed Appearance No border Show border and cap	Allow © Only one © More than one	
<u>C</u> aption:	Address	
	OK Cancel	

**NOTE** Later in the section, documentation is supplied for each field on the dialog box. Since this section is providing an overview, it does not delve into those details.

At this point, the screen looks like this.



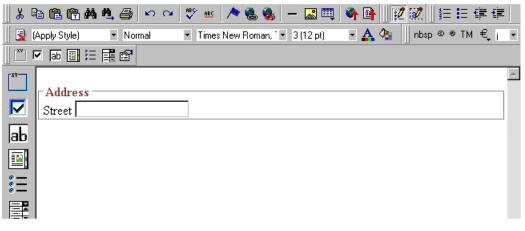
2. Select Address then apply bold and the custom color shown above. Now the screen looks like this.



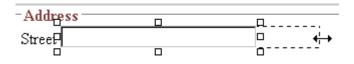
the plain text field icon (ab) into the space below **Address**. Then, complete the dialog as shown below.

Plain Text Field			×
Name: ( <u>2)</u>	Street		Indexed
Djsplay name:	Street		
D <u>e</u> fault value:			
Use			Allow
May not be remove	ed		Only one
○ M <u>a</u> y be removed			C More than one
_ Options		-Validation-	
<u> </u>		⊻alidation	ı
🗖 <u>R</u> ead Only		No valida	ation
<u>∏</u> <u>H</u> idden			<u>C</u> ustom Validation
Caption:	Street		
			OK Cancel

Now, the screen looks like this.



Note that the **Street** field is not wide enough. To widen it, click the field, move the cursor until you see a two-sided arrow, and drag the arrow to the right.



4. 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.

Plain Text Field		×
Name: ( <u>2)</u>	City	□ In <u>d</u> exed
Djsplay name:	City	
D <u>e</u> fault value:		
Use • May <u>n</u> ot be remov	ed	Allow © Only one
C May be removed		O More than one
- Options		Validation
Multi-Line		⊻alidation
🗖 <u>R</u> ead Only		No validation
<u>∏</u> <u>H</u> idden		<u>C</u> ustom Validation
Caption:	City	
		OK Cancel

Now, the screen looks like this.

	è 🛍 🛱 🖊	🐴 🎒 🗠	ra 🕴 😽 ebs	i \land 🐁 🎭	– 🔜 📖	🗳 📑	🙋 🗭 📗 j=	目標目
111	Apply Style)	<ul> <li>Normal</li> </ul>	<ul> <li>Time</li> </ul>	s New Roman, 1	• 3 (12 pt)	- 🗛 🍳	nbsp ©	® TM € <sub>, i</sub> •
[[ [ <sup>xv</sup> ]	🗹 jab 🔟 🗄	<b>R</b> 6						
	City							

5. 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 field icon (E) into that space. Then, complete the dialog as shown below.

Select List Field		
<u>N</u> ame:	state 🗖 Indexed	
List:	U.S. States & Territories	-
Item List	Item ⊻alue Iext	
Arizona [AR] Arkansas [AA] Armed Forces Ar [AA] Armed Forces E [AP] Armed Forces Pa [AP] Armed Forces Pa	ope, L	
Check item to be selecte	by default.	
Move Up	Move Down <u>R</u> emove	
First item is not a valid	selection. For example, ''(Select)''	
Data Style	OK Cancel	

Now, the screen looks like this.

X 🖻 🖻 🛱 🖊 🐴 🎒	🗠 😋 💞 🏨 🖊 🗞	- 🔣 🖽	🏘 📑 📗	12 📝 📗 📰	旧 💷
📗 🛃 (Apply Style) 🔹 🔹	👻 Arial, Helvetica	✓ 2 (10 pt)	-	nbsp © ⊛ TM	€, i •
	🚾 🔣 🖳 (Select Button)	- 1 🗗 😰			
Greet					A
City	State (Select)			•	]

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.



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)

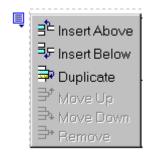
or

 place the cursor inside the box then select a field type button (if you are using the horizontal toolbar)

#### Advantages of Grouping Fields

One advantage of grouping fields is that you can allow the user in Data Entry mode to add another instance of a group.

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.



Another advantage of grouping fields is that you can suppress a group of irrelevant fields. For example, if a screen includes two groups of fields that collect information about hardcover and paperback books, and you are adding information about a hardcover book, you can collapse the paperback book questions because they are not relevant to your current task.

Use the eyeglass icon to expand or collapse the display of fields within a group.

#### Expanded Group Field with glasses icon highlighted

ktro	n B	ook Ste	ore	:	
Fitte:	<				
The Conf	idence Ma	an			
Genre:	Novel or(s)	•			
📮 First	t Name:	Herman		Last Name:	Melville
n 1	1 05	l 🖬 na sa			

#### **Collapsed Group Field**

Ektro	on Boo	ok Store
<b>■ _ </b> & Boo	k	
·		
Group Box		
Nam <u>e</u> :	Address	
Display name:	Address	
Use May no <u>t</u> be removed		Allow © <u>O</u> nly one
○ M <u>a</u> y be removed		○ More than one
Appearance		
○ No border		
Show border and capting	on	
<u>C</u> aption:	Address	
·		OK Cancel

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 <b>Field</b> followed by the next available number. So, the first field's default name is <b>Field1</b> , the second field's default name is <b>Field2</b> , 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 241
Allow	See "The Allow Field" on page 242
Appearance	Click <b>Show border and caption</b> 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 <b>No border</b> 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 <b>Ektron CMS200/300</b> '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 two possible values: checked or unchecked. For example

🗖 Check if you are over 65

Checkbox Field	×
N <u>a</u> me:	Indexed
<u>D</u> isplay name:	
Default value:	
C <u>I</u> rue (checked)	
• Ealse (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 207
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The <b>Indexed</b> field may not appear, depending on how your administrator set up your system.

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?
If you want this field to be checked when the screen first appears, click <b>True</b> .
Otherwise, click <b>False</b> .
Enter text to guide the user's response to this field. To continue the above example, the caption would be <b>Check if you are over 65</b> .
After you insert this field onto the screen, you can use <b>Ektron CMS200/300</b> '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.
_



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 a rich area field.

- You can validate the user response. For more information, see "Validation" on page 213.
- You can adjust the field's width by dragging it. See "Resizing a Plain Text Field" on page 214.
- The text can be read-only or hidden

The following capability is available with a rich area field but not 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**

Plain Text Field		
<u>N</u> ame:	Field1	🗖 In <u>d</u> exed
Djsplay name:	Field 1	
D <u>e</u> fault value:		
Use		Allow
May not be remove	d	
○ May <u>b</u> e removed		C More than one
Options		Validation
🔲 In <u>v</u> isible		V <u>a</u> lidation
Allow multiple lines		No validation
Canno <u>t</u> be changed		Custom Validation
Caption:	Text	
Data Style		Cancel

### 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 207
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.
	The <b>Indexed</b> 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 241
Allow	See "The Allow Field" on page 242

	n
Entry mode.	ets you store unseen information in each
This option lo	ent. An example might be putting a version
XML docume	he data design so that XML documents can
number for th	d to newer versions using an XSL transform.
be upgraded	<b>ple lines</b> - Check here to let this text box
Allow multip	ccommodate the user's input.
expand to ac	c check this box, a single line input box
If you do not	the data entry screen to accept user input.
appears on t	e either invisible or cannot be changed it
A field can b	oth.
cannot be bo	<b>changed</b> - Check here to make this field
Cannot be of	hat is, the user cannot insert data into it in
read-only. Th	node.
Data Entry m	se this option to provide user instructions for

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
	<ul> <li>Non-negative whole number or blank - the user must enter a positive whole number or no response</li> </ul>
	<ul> <li>Non-negative whole number (required) - the user must enter a positive whole number</li> </ul>
	• <b>Decimal number or blank</b> - 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.
	<ul> <li>Decimal number required - must be a decimal number (it cannot be blank) of none, one, or two decimal places.</li> <li>A leading minus sign "-" is allowed. The decimal</li> </ul>
	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 (US only) - the user's response must consist of 5 ( <i>nnnn</i> ) or 9 digits separated by a dash after the fifth ( <i>nnnn-nnnn</i> )
	• Social Security number (US only) - the user's response must consist of nine digits in this pattern: nnn-nn-nnnn
	• <b>Custom -</b> You can create custom validation.
	For more information, see "Custom Validation" on page 244.
	If you assign to this field any value other than <b>No</b> <b>validation</b> , 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 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 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.
Data Style	See "The Data Style Field" on page 242

### 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 209

**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

Note that, 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

Rich Area Field		×
Nam <u>e</u> :	Field6	□ Indexed
<u>D</u> isplay name:	Field 6	
Use		Allow
• May not be removed		Only one
○ <u>M</u> ay be removed		C More than one
		OK Cancel

#### 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 207

Field	Description
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.
	The <b>Indexed</b> 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 field.
Use	See "The Use Field" on page 241
Allow	See "The Allow Field" on page 242

# 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 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 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**

Choices Field	Field1 Indexed
Di <u>s</u> play name:	Field 1
Allow selection ● <u>0</u> nly one	Appearance Vertical List
C More than one ☐ A selection is required	<ul> <li>Horizontal List</li> </ul>
I <u>t</u> em List	Item ⊻alue 1 Caption: Value 1 No longer available <u>Add</u> Change
Check item to be selected t	by default.
<u>M</u> ove Up	Mov <u>e</u> Down <u>R</u> emove
Data Style	OK Cancel

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. <i>See Also:</i> "The Name Field's Default Value" on page 207
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The <b>Indexed</b> 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 <b>More than one</b> to allow the data entry user to select more than one item on the data entry screen. Otherwise, click <b>Only one</b> .
	For example, if you click <b>More than one</b> , and the choices are: music, art, sports, the user could select all three choices.
	If you click <b>Only one</b> , the user could only select one choice.
	A selection is required - Check this box if the user must select at least one item in the list.

Field	Description	
Appearance	Click Vertical List to arrange the choices vertically.	
	Click Horizontal List to arrange the choices horizontally.	
Item List	This section of the screen displays the items that you enter in the <b>Value</b> and <b>Text</b> fields. Buttons near the bottom of the screen let you remove items from this list as well as rearrange them.	
	Move Up Mov <u>e</u> Down <u>R</u> emove	
	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 <b>Only One</b> is selected under <b>Allow selection</b> (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 <b>Interests</b> 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 <b>music</b> here.	

Field	Description
Caption	Enter text to describe this item on the data entry screen. 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 Choices 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.
No longer available	See "No longer available" on page 222
Data Style	See "The Data Style Field" on page 242



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 appearing 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 216

For example:



Select List Field	
Name:	🗖 In <u>d</u> exed
List:	<b>•</b>
Item List	Item
	<u>I</u> ext
	🗖 No longer available
	Add <u>C</u> hange
Check item to be selected by defau	dt.
Move Up Mov	ve Down <u>H</u> emove
First item is not a valid selection	. For example, ''(Select)''
Caption:	
Data Style	OK Cancel

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 207
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The <b>Indexed</b> field may not appear, depending on how your administrator has set up your system.
List	

Field	Description
Item List	This section of the screen displays the items that you enter in the <b>Value</b> and <b>Text</b> 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 <b>Interests</b> 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 <b>music</b> here.
Text	Enter text to describe this item on the data entry screen.
	After you insert this field onto the screen, you can use <b>Ektron CMS200/300</b> 's formatting capabilities to modify its size, font, color, and other attributes.
No longer available	Use this field to indicate that an item can no longer be selected by a user in data entry mode. For example, you have a list of team members. If one member leaves, check <b>No longer available</b> rather than removing the item.
	If checked, the only appears in data entry mode <i>if</i> a document already contained the item's when the check is applied.
	This field lets you render a value obsolete without invalidating an existing XML document.
	<b>Exception!</b> If multiple selections are allowed in a Choices Field and the item is selected in design mode, it appears in data entry mode but is disabled (grayed-out). This lets you force an item's value into the XML document.
First item is not a valid selection. For	Check here if the first item on the list is not a valid value but instead text that prompts the user to respond to the field. An example of such text for a list of states would be <b>Select a state</b> .
example, "(Select)"	If you check this box and the user selects the first value on the list (most likely by default), an error message appears when he tries to save the screen.

Field	Description
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 <b>Choose your interests</b> . 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.
Data Style	See "The Data Style Field" on page 242



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.

Calculated Field		
<u>N</u> ame:	Field1	🔲 In <u>d</u> exed
Djsplay name:	Field 1	
Calculation	,	
<u>F</u> ormula:		
<u>E</u> xamples		Select Field
		•
- Validation		
<u>V</u> alidation	No validation	•
		C <u>u</u> stom Validation
<u>Caption:</u>	Text:	
Data Style		OK Cancel

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 207
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The <b>Indexed</b> 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	
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 <i>Also:</i> "Using the Formula Field" on page 226	
Select Field	Click this button to select a field to reference in the calculation. For more information, see "Using the Formula Field" on page 226.	
Examples	Click 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 <b>Formula</b> field.	
	Your system administrator can customize the examples. Instructions are provided in "The <cmddsgcalc> Command" in the Data Designer chapter of the Developer Reference Guide.</cmddsgcalc>	
	See Also: "Explanation of Examples" on page 228	
Validation	Select the kind of validation to apply to this field. Your choices are:	
	<ul> <li>No validation - the user's response is not checked</li> <li>Non-negative number (required) - the result of the calculation must be a positive number</li> </ul>	
	<ul> <li>Custom - You can create custom validation. For more information, see "Custom Validation" on page 244.</li> </ul>	
	If you assign to this field any value other than <b>No</b> <b>validation</b> , 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.	

Field	Description
Caption	Enter text to describe this item on the data entry screen. 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 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.
Data Style	See "The Data Style Field" on page 242

#### 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.

Calculation	
<u>F</u> ormula:	{X}+{Y}
<u>E</u> xamples	
Add two numbers (X + Y)	

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.

- 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.

Select a Field or Group		
Select a Field or Group		
Erent in the provided a set of the provided and the provided a set of the provided and the provided a set of the provided and the provided a set of the p		
ab title (Insert the title of the book)		
genre		
ab price		
Paperback		
Field1		
Field2		
ab Field3		
Field4 (current field)		
ab Name		

- Select a field to replace {X}. When you do, the field name replaces {X} in the Formula field.
- - 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).

Example Field Text	Example Field Formula	Description
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} &It= {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.
Multiply by another number if checkbox is checked	<pre>{X} * ( {Y} * number( {Z} ='true') + number( {Z} !='true'))</pre>	<ul> <li>X is a numeric field.</li> <li>Y is another numeric field to multiply by X if a checkbox is checked.</li> <li>Z is the checkbox.</li> <li>For example, {X}=2 and {Y}=3</li> <li>if the checkbox is checked, the result is 2 * 3, which is 6</li> <li>If the checkbox is not checked, the result is 2</li> </ul>
Round a decimal number	round({X})	Rounds the number to the nearest integer. For example, round(3.14). The result is 3.

Example Field Text	Example Field Formula	Description
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} &It= {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.
Multiply by another number if checkbox is checked	<pre>{X} * ( {Y} * number( {Z} ='true') + number( {Z} !='true'))</pre>	<ul> <li>X is a numeric field.</li> <li>Y is another numeric field to multiply by X if a checkbox is checked.</li> <li>Z is the checkbox.</li> <li>For example, {X}=2 and {Y}=3</li> <li>if the checkbox is checked, the result is 2 * 3, which is 6</li> <li>If the checkbox is not checked, the result is 2</li> </ul>
Round a decimal number	round({X})	Rounds the number to the nearest integer. For example, round(3.14). The result is 3.

Example Field Text	Example Field Formula	Description
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 <b>Total a list of numeric values field</b> (above):
		Plain Text Field properties
		Name: Miles
		Allow: more than one
		Validation: non-negative whole number
		XML Data
		<root></root>
		<miles>89</miles>
		<miles>12</miles>
		<miles>23</miles>
		<miles>19</miles>
		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 <b>Total a list of numeric values field</b> (above):
		Plain Text Field properties
		Name: Miles
		Allow: more than one
		Validation: non-negative whole number
		XML Data
		<root></root>
		<miles>89</miles>
		<miles>12</miles>
		<miles>23</miles>
		<miles>19</miles>
		Count = 4

Example Field Text	Example Field Formula	Description
Lowercase text	translate( {X} ,'ABCDEFGHIJKLMNOPQRST UVWXYZ','abcdefghijklmnopqrs tuvwxyz')	Replace all uppercase characters with the lowercase version of that character
Uppercase text	translate( {X} ,'abcdefghijklmnopqrstuvwxyz',' ABCDEFGHIJKLMNOPQRSTU VWXYZ')	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.



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.

J	anua	iry	•	20	06	•
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
	OK.			( (	Cance	el

Because users cannot enter digits, a standard date format is ensured.

The date is stored as a standard XML date (in the format yyyy-mmdd), and localized to the computer of the user viewing it.

### **Dialog Box**

Calendar Field		×
<u>N</u> ame:	Field1	📁 In <u>d</u> exed
Djsplay name:	Field 1	
D <u>e</u> fault value:		
Use		Allow
May not be removed		Only one
C May be removed		○ More than one
<u>C</u> aption:	Date:	
Data Style		OK Cancel

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 207
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.
	The <b>Indexed</b> 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 241
Allow	See "The Allow Field" on page 242
Caption	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use <b>Ektron CMS200/300</b> '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.
Data Style	See "The Data Style Field" on page 242



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 238

### Using a 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: **W**hen the user

clicks the icon, this screens described in "Inserting Images" on page 46 appear. See that section for more information.

**NOTE** The user can only insert a file whose extension is defined within the <validext> element of the configdataentry.xml file. Your system administrator can help you do this.

#### **Dialog Box**

Image Only Field	×
<u>N</u> ame:	Field1 Indexed
Djsplay name:	Field 1
Use May not be removed May be removed	Allow © <u>D</u> nly one © <u>M</u> ore than one
Default Image Location:	
<u>C</u> aption:	Erom File
	OK Cancel

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 207

Field	Description
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. The <b>Indexed</b> 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 241
Allow	See "The Allow Field" on page 242
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 <b>From File</b> 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>
	<validext>gif,jpg,png,jpeg,jpe,doc,txt </validext>

# 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 236)

### Using a File Link Field in Data Entry Mode

In Data Entry mode, the file link field's caption appears, followed by this icon: Use When the user clicks the icon, this screen prompts the user to specify a file and a caption for it.

**NOTE** The user can only insert a file whose extension is defined within the <validext> element of the configdataentry.xml file. Your system administrator can help you do this.

Select File	×	
File Location:	http://localhost/ewebeditpro4/samples/as	
	<u>F</u> rom File	
File Description:	File Link	
	OK Cancel	

#### **Dialog Box**

File Link Field	×
<u>N</u> ame:	Field1 Indexed
Dįsplay name:	Field 1
Use	Allow
May not be removed	○ <u>O</u> nly one
C May be removed	C More than one
D <u>e</u> fault File Location:	
Default File Description:	
<u>C</u> aption:	File:
Data Style	OK Cancel

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 207
Indexed	Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide. 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 241
Allow	See "The Allow Field" on page 242
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 <b>From File</b> 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></validext>
Default File Description	If desired, enter text that the user will be able to click on to access the linked file.
Caption	Enter text to describe this item on the data entry screen After you insert this field onto the screen, you can use <b>Ektron CMS200/300</b> '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 File Link 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.

Field	Description
Data Style	See "The Data Style Field" on page 242

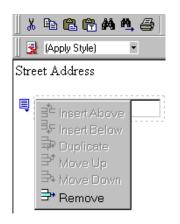
### **Fields that Appear on Several Dialogs**

#### 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 ( $\blacksquare$ ) 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, <sup>• add Street Address</sup> appears in place of the field.

#### NOTE

The menu icon (<sup>■</sup>) 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  $\blacksquare$ , 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**.

#### The Data Style Field

**WARNING!** In Ektron CMS200/300, the Data Styles do not appear when the screen is in WYSIWYG view.

Click the Data Style button to apply formatting to the field that accepts user input. When you do, the following dialog appears.

Data Value Style	]	×
Font <u>N</u> ame:	(Unassigned)	
Font <u>S</u> ize:	(Unassigned)	
Bold:	(Unassigned)	
Italic:	(Unassigned)	
Text Alignment:	(Unassigned)	
Text Line:	(Unassigned)	
Font <u>C</u> olor:	Unassigned	
Background Color:	<u> </u>	
	OK Cancel	

Use the dialog to assign the following formatting attributes to a user response field.

- Font style and size
- Bold and italic
- Text alignment (especially helpful for formatting dollar amounts in a plain text field)
- Underline or strikethrough
- Font color and/or background color

**NOTE** The configuration data controls a command's appearance on the toolbar and on the Data Style dialog. For example, if <button command="cmdfontname" /> is removed from configdatadesign.xml, it disappears from the toolbar and the Data Style dialog.

Below is an example of a response field whose font, size, alignment, background, and foreground colors were modified via this dialog.



### **Custom Validation**

The Plain Text and Calculation field dialogs feature a validation section (illustrated below).

-{	Validation		
	V <u>a</u> lidation		
	No validatio	n	⊡
		Custom Validation	

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.)

**NOTE** 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)

#### **NOTE** 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.

Custom Validation		×
Data Type		
Data <u>T</u> ype:	Whole number	V
Validation		
<u>C</u> ondition:		
		Select Field
<u>E</u> xamples		
		•
Error <u>M</u> essage:		
		OK Cancel

- 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.

Select a Field or Group		_ 🗆 ×
Select a Field or Group		
<ul> <li>Jook (Books) (1 or mor genre</li> <li>Jook (Books) (1 or mor</li> <li>Jook (Insert the title)</li> <li>Jook (Insert the tit</li></ul>		
	OK	Cancel

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 228

<u> </u>	
-Validation	
<u>C</u> ondition:	/book

#### **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 the Plain Text Field dialog and complete the screen.
- 2. In the validation section, click **Custom Validation**. The Custom validation screen appears.

Custom Validation		×
Data Type		
Data <u>T</u> ype:	Plain text	<b>_</b>
Validation		
Condition:		
		Select Field
<u>E</u> xamples		
		▼
Error <u>M</u> essage:	I	
		OK Cancel

3. In the **Data Type** field, select **Whole Number** from the drop down list. This ensures that the user can only enter digits.

- Data Type	
Data <u>T</u> ype:	Plain text
	Plain text
- Validation	URL (Whole number)
<u>C</u> ondition:	Decimal number Floating point number

4. Click the down arrow to the right of the **Examples** field to see sample logic.

Examples	<u>S</u> elect Field	
		(Ta)
Number between two values (X < . and . < Y)		لظ
Must equal another number (. = X) Must not equal another number (. != X)		- 1
Maximum text length (string-length(.) <= X)		

- 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}.</p>
- 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.

Custom Validation		×
Data Type		
Data <u>T</u> ype:	Whole number	<b>_</b>
Validation		
<u>C</u> ondition:	string-length(.) = 10	
<u>E</u> xamples		Select Field
		•
Error <u>M</u> essage:	must be 10 digits	
		OK Cancel

- 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.

# **Working with HTML Forms**

**Ektron CMS200/300** provides powerful online form capabilities, allowing you to turn your Web site into a two-way street. Now anyone in your organization – not just a developer or Webmaster– can create and deploy Web forms to capture visitor information. Ektron lets you create an online dialog with visitors. Support marketing strategies by getting feedback on their needs. Follow up on their interest in your products and services. Register people for events.

This chapter explains how to perform all Forms module actions through the following topics.

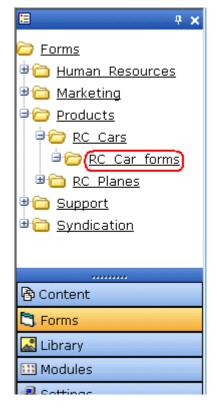
- "Overview of Form Processing" on page 250
- "The Structure of Form Data" on page 250
- "Form Permissions" on page 252
- "Preparing the Server to Send email" on page 253
- "Accessing the Forms Folder" on page 253
- "Form Module Toolbar" on page 254
- "Creating a New Form" on page 255
- "Creating a Form's Content Block" on page 258
- "Implementing a Form on a Web Page" on page 263
- "Sending Data as XML" on page 265
- "Form Validation" on page 272
- "Viewing Form Reports" on page 275
- "Exporting Form Reports" on page 276
- "Viewing Form Information" on page 277
- "Editing a Form" on page 279
- "Deleting a Form" on page 281

# **Overview of Form Processing**

Ste	ep	For more information, see
1.	Navigate to a folder in the Forms module	"Accessing the Forms Folder" on page 253
2.	Create a form	"Creating a New Form" on page 255
3.	Create a form content block	"Creating a Form's Content Block" on page 258
4.	Insert fields into the content block	"Inserting Form Elements" on page 258
5.	Assign the form content block to a template	"Implementing a Form on a Web Page" on page 263
6.	User visits your Web site and completes form. Form is mailed to an email address, saved to a database, or both.	
7.	View submitted form data and download it to a spreadsheet.	"Viewing Form Reports" on page 275

# The Structure of Form Data

Each form resides within the Forms folder, a standard subfolder of it, or a custom subfolder (such as **RC Car Forms** below).



A form consists of the following components:

- **Form** (title, ID number, whether the form data is sent as email, and/or saved to a database, etc.)
  - Content block information (title, start and/or end date, status, summary which contains the form's postback message, metadata, etc.)
    - within the content block, form fields (text field, password field, hidden field, radio button, checkbox, select list, submit button, etc.)

### Form Folders and Content Blocks

Before creating a form, select the Forms folder then select an existing folder or create a new folder. (The ability to create a new folder is a permission.) If you create a new subfolder, a corresponding folder is automatically created in the Content folder. Within the folder, you create the form, and then a content block within it. To work with the form later, return to the Forms folder and select it. You cannot see or work with the form content block from the corresponding content folder. However, you use the Content version of the folder to assign permissions and an approval chain. *See Also:* "Form Permissions" on page 252

### Mailto or Database Form

The Forms module lets you create a mailto or a database form to use on your Web site. When creating or editing a form, you must specify the type of form you're creating. The options are:

- Send it via email
- Store it in a database
- Send it via email and store in a database

See "Creating a New Form" on page 255 for information about toggling this option on and off.

#### Advantages of a Mailto Form

By creating a mailto form, any e-mail generation is done on the server-side, not on the client. This means that site visitors can submit email whether or not the client has e-mail software.

#### Storing Form Data in a Database

By storing form data in the Ektron CMS200/300 database, you can keep information submitted by site visitors and view reports on that information. You can also export the form data to a spreadsheet.

### Form Permissions

#### **Folder Permissions**

By default, form permissions are inherited from the form's folder. To customize permissions for any folder that contains forms, access the corresponding folder under Content and assign permission as described in "Setting Permissions for a Content Folder" on page 90.

### Administrator Permissions

Similar to content blocks, users in the administrator user group have full control over form features. You *must* be a member of the administrator group to:

- Add a form
- Edit a form
- Delete a form
- Assign a content block to a form

You may also perform all actions on a form's content block.

### **User Permissions**

Users who are not members of the administrator user group can add, edit, delete, and restore form content blocks if granted these permissions for the content folder or block.

# Preparing the Server to Send email

Since e-mail generated by forms is created on and sent from the server that hosts Ektron CMS200/300, the server must be enabled to handle those responsibilities. To configure your Web server to send e-mail, refer to "Configuring e-mail Notifications" in the Ektron CMS200/300 Setup Manual.

WARNING! A form typically includes fields for source and destination email addresses, which are used to transmit the form via email. An unscrupulous attacker can post a form to a CMS300 page and send email *from* any email address *to* any email address. The attacker's form can be on an HTML page on a server that is remote from the CMS300 installation. Any **Ektron CMS200/300** on a public site that includes the CMS300 sample site with the form.asp page and properly configured SMTP can be used to send spam.

# Accessing the Forms Folder

To access the Forms folder, follow these steps.

- 1. Navigate to the workarea.
- 2. Click the **Forms** button in the left frame.

	<u>Mail</u>
🗟 Content	Form c
🔁 Forms	
Library	
🛄 Modules	Name
뤚 Settings	<u>Addr</u>

3. The Forms page appears. Note that its folder structure matches the Content folder.

# Form Module Toolbar

Several toolbar buttons and tabs help you work with Forms.

Button or Tab	Name	Description	More Information
D	Edit Content	Edit the form's content block, which contains the form fields	"Editing a Form's Content Block" on page 280
Post Back Message or Summary	Edit Summary	Edit the summary assigned to a form's content block	"Editing a Form's Summary" on page 280
Metadata	Edit Metadata	Edit the metadata assigned to a form's content block	
යි ම	View Staged/ Published Content	Click <b>View Staged</b> button to view content that has not yet been published. Click <b>View Published</b> button to view content that is live on the Web site.	
ĥ	View History	View (and possibly restore) older versions of a content bock	"Content History" on page 64

Button or Tab	Name	Description	More Information
R	View Difference	Compare two version of a content block	"Comparing Current and Previous Content Blocks" on page 69
	Edit Form Properties	Access Edit Form page to change information about the form	"Editing a Form" on page 279
វិក	Delete Form	Delete a form	"Deleting a Form" on page 281
٢	Check Links	Check for other content blocks that contain a link to this form	"Link Checking" on page 66
3	Add Task	Add a task	"Managing Tasks" on page 289
2	View Task	View task information	
C3	Add Form	Add a new form	"Creating a New Form" on page 255
2	Export Report	Download form data to a Microsoft Excel spreadsheet	"Exporting Form Reports" on page 276
<u>60</u>	View Reports	View submitted form data; can select range of dates	"Viewing Form Reports" on page 275
or Form Properties	View Content Properties	Access view properties for the content block	"Viewing a Form's Content Block Properties" on page 279

# Creating a New Form

To create a new form, follow these steps.

- 1. Access the Forms module page, as described in "Accessing the Forms Folder" on page 253.
- Click the folder in which you want the form to reside. If you have permission to do so, click ( ,) to create a new subfolder under any folder.

**WARNING!** Do not choose a folder to which an XML configuration has been applied. This feature is designed for HTML forms, not XML. To learn about XML forms, see "Working with XML Forms" on page 192.

- 3. Click the Add Form button ( 🔁 ).
- 4. The Add Form page appears.
- 5. Enter information using the following table as a reference.

Field	Description	Required?
Title	Title used to reference form within the Workarea	Yes
Description	Extended description of form.	No
Form Data	Specify what to do with the form data. Your choices are <b>mailto</b> , <b>database</b> , or both. See "Mailto or Database Form" on page 252	No
Mail P	roperties	
submitted. To let the	sed in the email that is generated when the ne user override any field value while compl ser Override email Values" on page 257	
То:	e-mail address to which the form will be sent	Yes
From:	e-mail address to appear in the email's <b>From:</b> field	No
CC:	e-mail address to which a copy of the form will be sent	No
Subject:	Text to appear in e-mail's Subject field	No
Preamble:	Beginning text of email (could be used for entire text)	No
Send Data as XML	Check off to submit form as XML instead of plain text. See Also: "Sending Data as XML" on page 265	No

6. Click the Save Form button ( 🔚 ).

Now that you have entered information about the form, the next step is to enter information about the form's content block. This procedure is described in "Creating a Form's Content Block" on page 258.

### Letting the User Override email Values

You can let the user completing a mailto form override default values for the following elements:

- "to" email recipient(s)
- "from" email recipient(s)
- "cc" email recipient(s)
- subject line
- preamble (that is, default text)

To set up a user override for these fields, follow these steps.

- 1. Perform steps 1-4 in "Creating a Form's Content Block" on page 258 or edit an existing content block.
- 2. Within the editor, insert an appropriate field label, such as **Enter your email address**.
- 3. Click the **Text Field** toolbar button ( ) from the form element toolbar.
- 4. The Insert Text Field window is displayed.
- 5. In the Name field, enter the appropriate override name.

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	

6. Enter the remaining information and click **Insert** to add the field to the content.

When a user is completing the form and inserts an email address into the field you inserted in Step 5, that field value is used in the email.

# Creating a Form's Content Block

When you create a form, **Ektron CMS200/300** automatically creates a content block with the same name as the form. For example, if you create a form called 'New Form', a content block named 'New Form' is created for that form. Use this content block to insert the form's elements.

This content block is only available after you identify the form. Unlike regular content blocks, it is not accessible from the Content folder -- it is only available from its Form.

Creating a form content block is similar to creating a standard content block. The big difference is a special toolbar (illustrated below) to facilitate the insertion of form elements.



### **Inserting Form Elements**

To create a form's content block, follow these steps.

- 1. Access the form you created in "Creating a New Form" on page 255.
- 1. Click the Edit button ( []).
- 2. The Edit Content window opens.
- 3. Complete information for the content block.
- 4. Enter the content block title.
- 5. Enter the form. For more information, see

Button orTab	Description
Summary	Edit the summary for content block. If you want to customize the post back message, click the <b>Summary</b> tab. (A postback message informs the user submitting the form that his entry has been completed.) Then, enter a post back message for the form. The postback message can be as long as you want and can include images, files, hyperlinks, etc. <i>See Also:</i> "Summaries" on page 80
Metadata	Edit the metadata for content block See Also: "Metadata" on page 82
Schedule	Assign start or end dates, or both, for when content is published to Web site See Also: "Scheduling Content" on page 68
Comment	Enter history comment to indicate changes made to content
L Submit	Submit content block into approval or pre-approval process
Publish content to Web site.	
	Note: Only the last approver in the approval chain sees this button.
Check In	Save and check-in content. Click this button does not submit the content into the approval process, but rather lets other users change it.
Save	Save the content without submitting it into the approval process. If a user clicks save and then closes the editor, other users cannot edit the content.
Decline	This buttons appears if you are the next approver in the aproval list. Click it to decline the changes made to the content.
X Cancel	Close the editor without saving changes.

6. After you enter the body text, you have the following options.

### **Creating the Form**

By default, the form elements toolbar appears.

_ C; B; S; R;    ab  ** ≣  • ▶ F#  21	Y

The following table explains the form element toolbar buttons.

Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
B	Form	<form action="http://&lt;br&gt;localhost/ewebeditpro4/&lt;br&gt;formtest.htm" method="post" name="Test"><!--<br-->form&gt; Note: If this content block is associated with a form, this button is not needed.</form>	<ul> <li>Name</li> <li>Action page</li> <li>Method</li> <li>Encode Type</li> </ul>
B	Button	<input name="Test" type="button" value="Test&lt;br&gt;Button"/>	<ul><li>Name</li><li>Value</li></ul>
S	Submit Button	<input name="Submit" type="Submit" value="Submit&lt;br&gt;Button"/>	<ul><li>Name</li><li>Value</li></ul>
R	Reset Button	<input name="Reset" type="reset" value="Reset&lt;br&gt;Page"/>	<ul><li>Name</li><li>Value</li></ul>
ab	Hidden Text Field	<input <br="" type="hidden" value="This&lt;br&gt;is initial content"/> name="mycontent" />	<ul><li>Name</li><li>Value</li></ul>
ab	Text Field	<input <br="" name="mycontent" size="15" value="This is&lt;br&gt;initial content"/> /> Note: See "Letting the User Override email Values" on page 257 for information about overriding default Forms module settings.	<ul> <li>Name</li> <li>Value</li> <li>Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.</li> </ul>

Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
**	Password	<input <br="" size="5" type="password"/> value="" name="mypassword" />	<ul> <li>Name</li> <li>Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)</li> </ul>
	Test Area	<textarea <br="" name="mycontent">rows="5" cols="4"&lt;br&gt;type="textarea"&gt;This is initial&lt;br&gt;content</textarea>	<ul> <li>Name</li> <li>Value</li> <li>Rows</li> <li>Columns</li> </ul>
0	Radio Button	<input <br="" type="radio"/> checked="checked" value="This is a radio button" name="mybutton" />	<ul> <li>Name</li> <li>Value</li> <li>Default is Checked</li> </ul>
J	Check Box	<input <br="" type="checkbox"/> checked="checked" value="This is a check box" name="mycheckbox" />	<ul> <li>Name</li> <li>Value</li> <li>Default is Checked</li> </ul>
	Select	<pre><select multiple="multiple" name="myselectbox" size="25"> <option value="option1">option1<!-- option--> <option value="option2">option2<!-- option--> </option></option></select></pre>	<ul> <li>Name</li> <li>Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)</li> <li>Allow multiple</li> <li>Option name</li> <li>Display value</li> </ul>
Ê	File Upload field and browse button	<input <br="" size="10" type="file"/> name="Save" />	<ul> <li>Name</li> <li>Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)</li> </ul>

Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
<b>P</b>	Form Validation	Applies a validation rule to selected form element. See Also: "Form Validation" on page 272	

To create a form, follow these steps.

- 1. Move the cursor to the screen position where you want the first field.
- 2. Click the button corresponding to the kind of field you want to insert.
- 3. Complete the dialog box that collects information about the field.

Here is an example of form content that you can create.

🔄 🛃 (Apply Style) 🔹 Normal 🔹	Verdana	<ul> <li>2 (10 pt)</li> </ul>	- 🗛 🐴	BI	<u>U</u> A
% 🖻 🛍 🖻 🖻 🖷 👭 🛝 🎒 👂 🗠	) 🕶 😽 🛤 🖊	• 🍓 🎭 🎒 🤗	- 🔜 d	🤌 📖 🛛	W
A x <sup>2</sup> x <sub>2</sub>   nbsp © ® TM €_ i ▼ ⊞	- 1	∐ \$≡ t≡ t≢ ti		= = )	
B. B. S. R.   50 ab 👫 🗐   © 🗹	😫 😰 🛛				
First Name	Last Name				
Company name	Address				
	asp.net solution	1			
	XML based edi	tor			
	CMS 200				
Product	CMS for ColdFu	ision			
Credit o	ard 📃				
	Jan 🔺	2004 🔺			
	Feb 💻	2005			
	Mar	2006			
Expiration: m	nonth 🗛r 🗾 y	ear 2007 💌			
	Submit Form				

11

Note that the first four fields use plain text while the fifth uses a select box.

You can apply validation criteria to any field by selecting the field then clicking the Form Validation button (). For more information, see "Form Validation" on page 272.

- 4. Click the **Save** button ( 🔙 ).
- 5. The summary is saved and you return to the Edit Content window.
- 6. Click the Save and Submit or Publish button ( ₺). The form will not appear on your Web site until it is published.

Next, the form may need to go through the approval process. When that is complete, add it to the site by assigning it to a page template. The next section explains that procedure.

# Implementing a Form on a Web Page

After you create a form, the next step is to implement it on a Web Page. To do that, follow these steps.

**NOTE** The use of functions to manage templates is documented in the Ektron CMS200/ 300 Developer's Manual.

- 1. Open the web template on which you want the Form content block to appear. (This example uses support.asp.)
- 2. Place the custom function for a Form content block within the body of the template.

<%ecmFormBlock(31) %>

This function calls the specified Form content block (in this example, id=31) to display the form within the support.asp template.

Address 🙆 http://192.1	68.0.171/cms300sample/support.asp	▼ 6
Harra I. Braducta	Support News Careers Search Calendar	Login   Contact Ektron
Home   Products	Support   News   Careers   Search   Calendar	Login   Contact Ektron

### Support Request Form

This is a sample support request form for RC International. Validation is set for most fields for the type of data required.

Name:	cannot be blank
Email:	format as email@yourcompany.xxx
Product:	Select Product 💌 must select product from list
Purchase Date:	format as MM/DD/YYYY
Purchase Price:	format as \$DDD.CC
visa / Mastercard:	format as 411111111111111
Notes:	×
	Submit

- 3. Save and close the template file.
- 4. To test your form, navigate to your Web site then to that page.
- 5. Complete the form.
- 6. Click the **Submit Form** button.
- 7. The page is refreshed and displays the post back message that you created.

# Sending Data as XML

While creating a form that generates email, you can specify that the e-mail be sent as XML data or plain text. (See "Creating a New Form" on page 255 for information about setting this option.)

Because XML data is structured, you can easily parse the content to store and retrieve important information. Also, if you download the form data to an Excel spreadsheet, the XML tags become the spreadsheet's column headers. *See Also:* "Exporting Form Reports" on page 276.

This section contrasts XML and plain text email using the form displayed below as the example. Here is an example of a form before it is submitted.

1	Contact Ektron Support
Name	John Doe
Email Address	john.doe@yourcompany.com
Phone Number	(555) 555-1234
Problem	This feature is 🔺 great!
	Submit

The following table displays the resulting e-mail, depending on the method used.

Form sent as	Generated e-mail
Plain Text	Ele       Edit       Yiew       Tools       Message       Help         Ele       Edit       Yiew       Tools       Message       Help         Reply       Reply All       Forward       Print       Delete       Previous       Next       Addresse         From:       Ektron       CM5300 User       Delete       Previous       Next       Addresse         Date:       Wednesday, July 23, 2003 3:19 PM       To:       support@ektron.com       Subject:       CM5300 Sample Site inquiry         This form was submitted from the Ektron       CMS300 Sample Web site.       7/23/2003 3:19:08 PM         Name       John Doe       Email       john.doe@yourcompany.com         PhoneNumber       (555) 555-1234       problem       This feature is great!

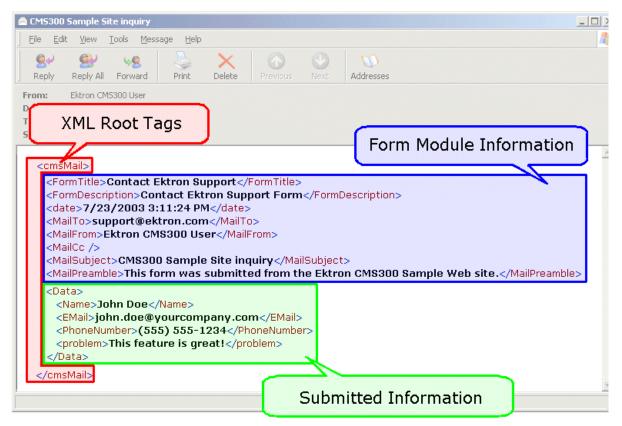
Form sent as	Generated e-mail
	Image: State indication indication in the image in t
	<pre><mailcc></mailcc> <mailsubject>CMS300 Sample Site inquiry</mailsubject> <mailpreamble>This form was submitted from the Ektron CMS30 <data> <name>John Doe</name> <email>john.doe@yourcompany.com</email> <phonenumber>(555) 555-1234</phonenumber> <problem>This feature is great!</problem> </data> </mailpreamble></pre>

### XML e-mail Structure

A form's XML structure consists of two groups of XML tags:

- Form and mail elements
- Data elements

The following image illustrates the sections of XML e-mail structure.



The following explains the sections of the XML e-mail.

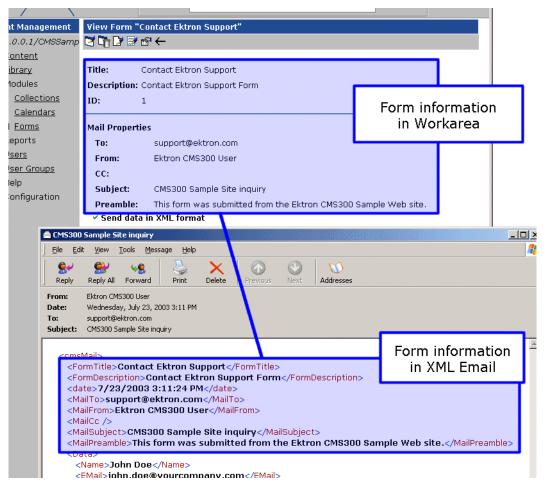
#### Root Tag

The XML e-mail is wrapped in <cmsMail> root tags.

#### Form & Mail Tags

The form and mail tags display information about the form that was generated from the form information.

This illustration compares the information defined for the form with the information in the XML email.



The following table explains each XML tag in the form and mail sections of the e-mail.

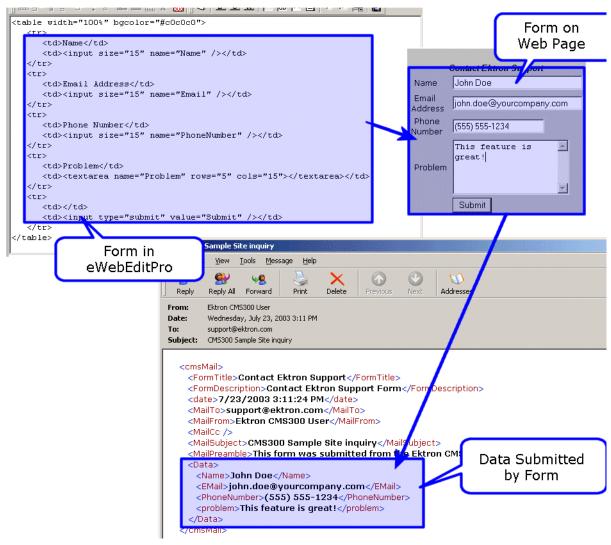
XML Tag	Description
<formtitle></formtitle>	Title given to the form that was submitted.
<formdescription></formdescription>	Description given to the form that was submitted.
<date></date>	Date and time the form was submitted.
<mailto></mailto>	To e-mail address(es) defined in the form.

XML Tag	Description
<mailfrom></mailfrom>	From e-mail address(es) defined in the form.
<mailcc></mailcc>	CC address(es) defined in the form.
<mailsubject></mailsubject>	Subject for the generated e-mail defined in the form.
<mailpreamble></mailpreamble>	Preamble for the generated e-mail defined in the form.

#### Data Tags

The XML e-mail's data tags wrap the information entered by the form's submitter. Each form element in the content block becomes an XML tag.

The following image illustrates how a form is edited in the editor, displayed on a Web page, and then converted to XML for the e-mail.



As you can see, the content block is comprised of four form elements that are converted to XML tags:

- Name
- Email
- PhoneNumber
- Problem

# Form Validation

You can apply validation rules to form elements in a form content block. Validation rules ensure that user input in a form field meets your criteria. For example, a validation rule can specify that a user's response to the **Birth Date** field conforms to a standard date format. If user input does not conform, an error message that you create informs the user of the problem. The input must conform before the form can be submitted.

You can only apply validation rules to these field types:

- Text field
- Text area field
- Select list field

The field's type determines which validation rules can be applied.

#### When Validation Rules are Applied

Validation rules are applied when a user submits a form, not when the input is entered. If invalid input is found, the error message that you define appears.

The user must change the field's input to conform to the validation rule. When he does, the next field is checked and, if that is invalid, its error message appears, etc.

#### Steps for Applying Validation Rules to a Form Field

To apply a validation rule to a form field, follow these steps.

- 1. Perform steps 1-4 in "Creating a Form's Content Block" on page 258.
- 2. Insert a text field, text area field, or a selection list.
- 3. Click the form element you just inserted so that it is surrounded by small squares.

b  ab  ** 🔳	• 🗹 🔡 😰	
Name		₽Add
		Submit For

- 4. Click the **Set Validation** button (**V**) from the form element toolbar.
- 5. The Form Validation Rules window opens.

🎒 Form ¥alida	tion Rules - Microsoft Internet Explorer	- D ×
Validation Type:	No Validation	
Error Message:	Save Cancel	
	Save Carler	
Done	Local intranet	

6. Select from the drop-down list a validation rule to apply to the form element.

The following table explains validation rules, and the fields to which you can apply each rule.

Validation Rule	Can be applied to	When applied, data in the field must	Valid Examples
No Validation	<ul> <li>Text field</li> <li>Text area field</li> <li>Select list field</li> </ul>	No validation is applied	

Validation Rule	Can be applied to	When applied, data in the field must	Valid Examples
Cannot be blank	<ul> <li>Text field</li> <li>Text area field</li> </ul>	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	Conform to a date format. For example, mm/dd/yy or mm/ dd/yyyy	03/02/80 08/29/2002
Email Type Only	Text field only	Be a valid email address	ajo@company.com
Credit Card Validation	Text field only	Be a valid credit card number	V/SA: 4111 1111 1111 1111 (16 digits) MC: 5500 0000 0000 0004 (16 digits) AMEX: 3400000000009 (15 digits) DC: 3000000000004 (14 digits) D/S: 601100000000004 (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
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

Validation Rule	Can be applied to	When applied, data in the field must	Valid Examples
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.	9999999999 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	

- 7. Enter an error message. This message appears if the user's input does not conform to the validation rule.
- **TIP!** If you apply validation rules to more than one field, include the field name in the error message. For example, enter **The name field only allows text**. This is good practice because error messages only appear *after* the form is submitted and, if the message does not identify the field, the user may be unable to identify which field needs correction.
  - 8. Click the **Save** button to save changes.

# **Viewing Form Reports**

**NOTE** This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

If a form is set to store data in the database, you can run a report that displays the submitted data. To view a form report, follow these steps.

- 1. Access the Forms folder, as described in "Accessing the Forms Folder" on page 253.
- 2. Navigate to the folder for which you want to view the report.
- 3. The Form Modules page appears.
- 4. Click the form you want to view.
- 5. The View Form page appears.
- 6. Click the View Reports button ( 🚻 ).
- 7. The View Forms Report page appears.
- 8. Enter report criteria using the following table as a reference.

Field	Description
Start Date	If desired, specify a start date. The report displays only forms that were submitted on or after the start date.
End Date	If desired, specify an end date. The report displays only forms that were submitted on or before the end date.
Report Display	Choose to display the report horizontally or vertically.
Data Type	Specify the data type to filter the report by.

9. Click the Get Result button to display the report.

#### **Exporting Form Reports**

After you run a report, you can export its data to a Microsoft Excel spreadsheet file (.xls) for further analysis. If a form uses an XML structure, each XML tag becomes a column header in the spreadsheet.

To export form data, follow these steps.

- 1. Access the View Form Reports page for the report you want to export, as described in "Viewing Form Reports" on page 275.
- Click the Export Reports button ( 2).

- 3. A File Download dialog box is displayed. Choose the option that best suits your needs.
- 4. After the data is exported, you can analyze and modify the .xls file to suit your needs.

# Viewing Form Information

You can view

- information about a form
- information about a form's content blocks

#### **Viewing a Form's Properties**

After a form is created, you can view its information in the Forms folder. To view a form, follow these steps.

- 1. Access the Forms folder, as described in "Accessing the Forms Folder" on page 253.
- 2. Click the form you want to view.
- 3. The View Form page displays. The following table explains the information on the screen.

Field	Description
Form Title	Title used to reference the form.
FormID	ID number automatically assigned to form
Status	The form's current status.
Description	Extended description for the form.
Form Data	The type of form data: Mail or Database. See Also: "The Structure of Form Data" on page 250
Content Properties	Displays the properties of the form's content block .

Field	Description	
Content Title	Title of content block associated with form.	
	Note: The content name is the same as the Form name.	
Content ID	Content ID number assigned to content block	
Status	The status of the content block	
Last Editor	Last user to edit the content block.	
Start Date	Date and time when the content block will go live on the Web site (if set and for a future date).	
End Date	Date and time when the content will be removed from the Web site if set and for a future date).	
Date Created	Date and time when content block was created.	
Mail Properties	The form's mail properties link.	
То	Email address to which the form is sent when submitted. See Also: "Letting the User Override email Values" on page 257	
From	Text that appears in the email's <b>From</b> field. See Also: "Letting the User Override email Values" on page 257	
СС	Text that appears in the email's <b>CC</b> field. See Also: "Letting the User Override email Values" on page 257	
Subject	Text that appears in the email'ssubject field. See Also: "Letting the User Override email Values" on page 257	
Preamble	Beginning text of the email. See Also: "Letting the User Override email Values" on page 257	
Send data in XML Format	A green check means email data will be in a structured XML packet. A red X means the email data will be in a standard mailto format. See Also: "Sending Data as XML" on page 265	
Form Content	Content block associated with the form.	

Field	Description
Post Back Content	Summary of content block associated with form. This content is displayed when form is submitted.

The view form page also contains several buttons to perform actions. To learn about the buttons, see "Form Module Toolbar" on page 254.

#### **Viewing a Form's Content Block Properties**

From the View Form page, you can see the View Form's Content Block properties page. From this page, you can see additional information about the content block that does not appear on the View Form page. To view the properties for a form's content block, follow these steps.

- Navigate to the View Form page of the form whose properties you want to view, as described in "Viewing a Form's Content Block Properties" on page 279.
- Click the View Content Properties button (
   ).
- 3. The View Content Proprties page for the selected content block is displayed. For more information, see "Content Properties" on page 66.

# Editing a Form

After you create a form, it can easily be edited if information needs to be changed. To edit a form, follow these steps,

- 1. Access the View Form page for the form you want to edit, as described in "Viewing a Form's Content Block Properties" on page 279.
- Click the Edit Form button ( ).
- 3. The Edit Form page is displayed.
- 4. Make the necessary changes to the form
- 5. Click the Save button ( 🔚 ).

#### **Editing a Form's Content Block**

You can edit the content block associated with the form by a variety of methods, including:

- Accessing the content by the toolbar button menu on the Web page.
- Editing the content by the View Form page
- Accessing the content by the View Form content properties page

This section explains how to edit a form's content block from the View Form page. To edit a form's content block, follow these steps.

- 1. Access the View Form page for the content block, as described in "Editing a Form's Content Block" on page 280.
- Click the Edit content button ( ).
- 3. The Edit Content page appears.
- 4. Make the necessary changes to the form's content block.
- 5. If needed, Click the Edit Summary or Edit Metadata tab to edit to the content block's summary or metadata.
- 6. Click a workflow button (Submit for Publication or Publish).

#### Editing a Form's Summary

A content block's summary is used to contain the post back message when a visitor submits a form.

To edit a form's summary, follow these steps.

- 1. Access the View Form page of the form whose summary you want to edit, as described in "Viewing a Form's Properties" on page 277.
- 2. Click the Edit Summary tab.
- 3. The Edit Summary page is displayed.
- 4. Make the necessary changes to the summary.
- 5. Click the Save button ( 🔚 ).

## **Deleting a Form**

You can easily delete forms that are no longer needed.

**NOTE** Deleting a form also deletes its associated content block and summary.

To delete a form, follow these steps.

- 1. Access the View Form page for the form you want to delete, as described in "Accessing the Forms Folder" on page 253.
- 2. Click the Delete Form button ( 📑 ).
- 3. A confirmation message is displayed.
- 4. Click OK
- 5. The page is refreshed, and the Forms table appears with the deleted form removed.

# 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 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 the **Help** Folder to view its contents.



4. A list of manualsappears.

Ektron CM5300 Workarea	a for Application Administrator - Microsoft Internet Explorer	
200	Workarea	
🗉 🕂 🛪	Ektron CMS300 Help	
Canadian Control (Control (Contro) (Contro) (Contro) (Contro) (Contro) (Contro) (Contro) (Con	Manuals • <u>Developer Manual</u> • <u>Administrator Quickstart Manual</u> • <u>Administrator Manual</u> • <u>User Manual</u> • <u>Setup Manual</u>	
	Ektron Web Site Online Resources • Visit Help Page on Ektron.com • What's new with Ektron CMS300 • Ektron CMS300 Feature Tour • Learning Center • Developer Resources • Have a question? • Request a demo from Ektron	
•		
🗟 Content		
Forms		
Library		
Administrate		

5. Click a link to open the manual or Web page.

# **Font Manager**

As an administrator, you can 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 creating content. 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:

🚰 Ektron CM5300 Workarea for A	pplication Administra	ator - Microsoft Internet Exp	blorer	
	•	WORKAREA	Friday, 1	User: admin Iuly 23, 2004
🗉 🕂 🛪	View Available S	ystem Fonts		
<ul> <li>Settings</li> <li>Users</li> <li>User Groups</li> <li>Help</li> <li>Configuration</li> <li>Active Directory</li> <li>Setup</li> <li>Metadata Definition</li> <li>XML Configurations</li> <li>Fonts</li> </ul>	Fontname Arial Courier test Times New Romar Verdana	Font Face Sample This is a sample of the sele This is a sample of style. This is a sample of the selected This is a sample of the selected This is a sample of the s	the selected font selected font face style font face style.	
Content Conten			Eucoal intra	net

## **Adding Fonts**

To add a font to the application, follow these steps.

1. Access the Font Manager. To do this, access the Administrator Workarea and click the **Fonts** folder.

÷ 🗀	Active Directory
	<u>Setup</u>
	<u>Metadata Defini</u>
	XML Configuratio
	Fonts

A a list of all current fonts appears.

- 2. Click the add font button  $(\mathbf{A})$ .
- 3. The add font page is displayed.

	Add Font ₩ ←
	Font Name or Family:
4.	Enter the font name or family into the text field provided.

- 5. Click the save button (🔛.)
- 6. The page is refreshed, and the updated fonts table is displayed.

The new font is available to use when adding or editing content.

		End Date:				
▼ Heading 4 ▼	Kristen ITC	🗟 🗸 🗛 🖓 🖪 🖌				
, i ▼ 🛛 🖽 ⊃ 🛛	Arial Courier	∉ ∉ ≧ ≣ ≣ ≣ ≝ €				
3 M 🎒 🗠 🖓	Kristen ITC Times New Roman Verdana	<b>()</b> – 🔜 🖽				
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**

When viewing fonts, you can also edit or delete them.

To view a font:

- 1. Access the font manager in your Administrator Workarea as described in "Adding Fonts" on page 285.
- 2. Click the font you want to view.

Fontname	Font Face Sa
Arial	This is a samp
<u>Courier</u>	This is a
<u>Kristen ITC</u>	This is a samp
Times_Jew Roman	This is a sample
<u>Verdana</u>	This is a sam

3. The view font page is displayed.

#### **Edit Fonts**

When a font is edited, the font name or family name is changed. To edit a font name:

- 1. Access the view font page, as described in "Viewing Fonts" on page 286.
- 2. Click the edit button in the toolbar at the top of the page.
  - 2
- 3. The edit font page is displayed.

Edit Fon	Edit Font "Arial"		
→ 🖬			
Font Nan	ne or Family: Arial		
	4. Edit the font name or family in the text field specified.		
	<ol><li>When finished, click the update button in the toolbar at the top of the page to save and update the changes.</li></ol>		
	The page is refreshed, and the updated fonts table is displayed.		
te Fonts	5		
	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		

2. Click the delete button in the toolbar at the top of the page.

"Viewing Fonts" on page 286.

3. The following message is displayed.



- 4. Click the OK button to proceed with deleting the font.
- 5. The page is refreshed, and the updated fonts table is displayed.

When you delete a font from Ektron CMS200/300, you do not delete the font from the machine.

# **Managing Tasks**

Tasks are typically assigned to content blocks to help you monitor and manage changes to your Web site. Within Ektron CMS200/ 300, both users and the system can assign tasks to other users. Tasks may include updating content, publishing a content block, updating an image and reordering a collection.

There are two kinds of tasks:

- "Tasks Not Assigned to Content Blocks" on page 294
- "Tasks Assigned to Content Blocks" on page 297

A standard Ektron CMS200/300 user only sees tasks that are either assigned to or by himself. However, an administrator can view all tasks regardless of who they are assigned to or by.

This chapter explains how to access, manage, and assign tasks via the following topics:

- "The Tasks Folder" on page 290
- "Task Permissions" on page 290
- "Task Toolbar" on page 292
- "Tasks Not Assigned to Content Blocks" on page 294
- "Tasks Assigned to Content Blocks" on page 297
  - "Task States" on page 297
  - "Automatic Creation of Tasks Associated with Content Blocks" on page 301
  - "Manual Creation of Tasks Associated with Content Blocks" on page 302
  - "Viewing a Task" on page 307
  - "Email Notification" on page 313
  - "Editing a Task" on page 313
  - "Adding Comments to a Task" on page 315

- "Archiving a Task" on page 316
- "Deleting a Task" on page 317
- "Purging a Task" on page 318

# The Tasks Folder

The tasks folder in the Smart Desktop contains all tasks in the Web site.



# **Task Permissions**

You can assign the following task-related permissions in the Edit Users and Edit User Groups screens:

- Create task
- Redirect task (that is, assign to another user)

• Delete task

Users can only perform these functions as specified in the Edit Users and Edit User Groups screens.

Edit User "jedit"		
		21010
Username:	iedit	
First Name:	jedit	
Last Name:	jedit	
Password:	Jaaaaaaaa	
Confirm Pwd:	Japanaan	
User Language:	App Default	
E-Mail Address:		
🗹 Disable E-Mai	Notifications	
(Emails for this a	plication are currently disabled)	

🔮 Username	Create Task	Redirect Task	Delete Task
jedit		<b>v</b>	

#### **Assigning Group Permissions**

A users can either inherit permissions from all groups of which he is a member or can be granted task permissions uniquely, without regard to his groups.

#### Inheriting Task Permissions from User Groups

To have a user inherit task permissions from all groups of which he is a member, check the **Inherit Task Permissions From User Groups** check box on the Edit User screen.

#### Assign Unique Task Permissions

To assign unique task permissions to a user, without regard to permissions assigned to groups of which he is a member, uncheck the **Inherit Task Permissions From User Groups** check box on the Edit User screen.

#### **Belonging to More Than One Group**

If a user inherits task permissions from groups and is a member of more than one group, the user inherits permissions assigned to all groups. So, for example, if Group A is allowed to create tasks and Group B is only allowed to delete them, a member of both groups can create *and* delete.

## Task Toolbar

The following table explains toolbar buttons you can use while managing tasks.

Button	Name	Description	More Information
<mark>₁</mark>	Add Comment	Add a comment to the task	"Adding Comments to a Task" on page 315
3	Add Task	Add a task from the content folder	"Assigning Tasks to a Content Block" on page 66
¢	Add Task	Add a task from the Tasks folder	"Tasks Assigned to Content Blocks" on page 297
←	Back	Return to previous page	
Ũ	Delete Task	Delete a task	"Deleting a Task" on page 317
Ľ	Edit Task	Edit a task	"Editing a Task" on page 313

Button	Name	Description	More Information
	Save	Save task information	
	Update	Save and update task information	
2	View Task	View task information	"Viewing a Task" on page 307

# Tasks Not Assigned to Content Blocks

# Creating a Task not Assigned to a Content Block

Νοτε

Only users with permission can create tasks. See Also: "Task Permissions" on page 290

Tasks do not have to be associated with a content block. Anyone can assign any task to anyone else at any time. Because they are not associated with content blocks, these tasks are not part of the workflow.

To create a task that is not associated with a content block, follow these steps.

- 1. Access the Tasks folder in the Workarea.
- 2. Click the Add button (
- 3. The Add Task window appears.
- 4. Enter 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 to whom to assign the task.
Content	Ignore
Priority	Specify the task's priority

Field	Description
State	If the task is not linked to a content block, you can assign it to any state.
	See Also: "Task States" on page 297
	However, if you later link the task to a content block (via the <b>Content</b> link above), the state switches to Not Started.
	Users can sort a list of tasks by state.
Due Date	Using the calendar button, choose the date by which the task needs to be completed
Start Date	Using the calendar button, choose a date when the task should be started
Description	Add additional information about the task

#### 5. Click the Save button ( ]).

If email notification is enabled, an email is sent to the user/user group to whom the task is assigned.

# Working with Tasks not Assigned to a Content Block

After you add a task, only the following users can view it

- administrators
- the user who created the task
- users to whom the task is assigned

See Also: "Determining Which Tasks a User Can View" on page 311

Those users can view the task via a task view option (see "Task View Options" on page 309).

After viewing a task, an authorized user can change its state, assign it to a different user, or add a comment. After the task's

state is assigned to deleted, an authorized user can remove it from the system by purging it from Deleted Task View Option.

# Tasks Assigned to Content Blocks

A task can be assigned to a content block, either by a user or by **Ektron CMS200/300**. Such a task typically notifies a user that he needs to act on a content block. For example, you may create a task that tells your manager you have updated the content and want her to review your work and possibly publish the content.

## **Task States**

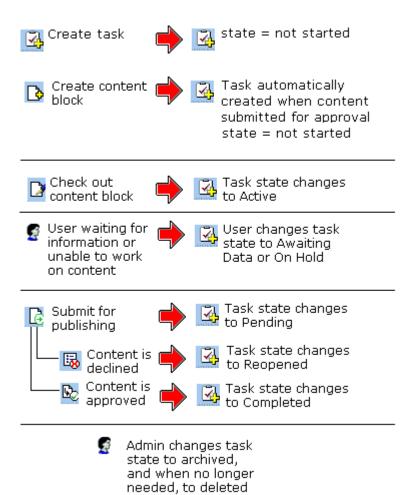
During the "life" of a task assigned to a content block, it normally progresses through a series of states. The state helps track a task's progress from creation to completion and even removal from the database. When reviewing the history of a task, the state can be used to review which actions changed the task's state by whom and when.

#### **User Assigned versus System Assigned States**

Some states can only be assigned by users while others are only assigned when an event occurs to the associated content block. For example, when a content block is first submitted for approval, the associated task's state changes to Not Started.

**IMPORTANT!** The administrator user can always change a task's state to any other state.

The following graphic illustrates the sequence of user and system actions that change a task's state.



### **Progression of Task States**

State	Description	Assigned by User?	Assigned by System?
Not Started	If task created <i>manually</i> , assigned when task is created. See Also: "Manual Creation of Tasks Associated with Content Blocks" on page 302 If task created <i>automatically</i> , assigned when user submits for approval a content block with no <i>open</i> tasks. (An open task is one whose state is one of the following: Not Started, Active, Awaiting Data, on Hold, or Pending). See Also: "Automatic Creation of Tasks Associated with Content Blocks" on page 301	No	Yes
Active	The task's content block is checked out.	No	Yes
Awaiting Data	The task is started but the assigned-to user is awaiting data from an external source. You can use comments to indicate the data being waited for.	Yes	No
On Hold	Task cannot be worked on at this time.	Yes	No
Pending	The content block is submitted for approval. See Also: "Conditions for a Content Block's Submission to Approval Chain" on page 300 A task remains pending while its content block is in the approval process. When the last person in the approval chain approves the content block, the task's state changes to Completed. If any approver declines the content block, the task's state changes to Reopened. If an editor edits the content block and then checks it back in, the task's state changes to Reopened.	No	Yes
Reopened	A content block is declined by an approver in the approval process. Also, if someone edits a content block whose task state is pending, the tasks's state changes to Reopened.	No	Yes
Completed	The last user in the approval chain approves the content block and it is being published.	No	Yes

State	Description	Assigned by User?	Assigned by System?
Archived	After a task is completed, administrators can assign this state. It no longer appears on open task lists but is kept for reviews and reports. Only the administrator can view Archived tasks. <i>See Also:</i> "Archiving a Task" on page 316	Yes	No
Deleted	When an archived task is no longer needed for reporting or reviewing, administrators can assign this state. While in this state, the task remains in the database. <i>See Also:</i> "Deleting a Task" on page 317 When you purge the task, it and all of its transactions are removed from the database. <i>See Also:</i> "Purging a Task" on page 318	Yes (user with delete permission can delete; only admin can purge)	No

# Conditions for a Content Block's Submission to Approval Chain

If a user creates a content block and submits it for approval, it is assigned to a user group, a task is created for it, and its state is set to not started. (This is explained in "Automatic Creation of Tasks Associated with Content Blocks" on page 301.)

If another user who is not in the designated group edits the content block and submits it for approval, the associated task's state remains "not started." The content block's state only changes to pending when a member of the designated group submits it for approval.

#### **Restrictions on the Task Flow Process**

- Once a task is submitted for approval, the assigned user cannot edit the content. The task status must be changed to Reopened for the user to edit the content.
- A reviewer can only edit the content if he has permission to do so.
- Setting the task status to archived or deleted can only be done by a user with archive and delete permissions. This can be done at any stage in the task flow process.

- Notes can be entered for the task at any time in the task flow process.
- An administrator can assign a task to any state.

# Automatic Creation of Tasks Associated with Content Blocks

#### **Enabling Automatic Task Creation**

The **Pre Approval Group:** field on the Application setup page turns automatic task creation on or off. If this field has no value, it is off. If you assign a user group, the feature is turned on, and automatically created tasks are assigned to the designated user group.

Set smart desktop as the start location in the workarea.

Force preferences to all users

#### Pre Approval Group:

Select User Group: Administrators 💌

#### **How Automatic Task Creation Works**

When a user submits a content block for approval, **Ektron CMS200/ 300** checks to see if an "open" task exists for it. (An open task is one whose state is Not Started, Active, Awaiting Data, on Hold, or Pending.) If none exists and automatic task creation is turned on, a task is created and associated with the content block. Such a task must be approved by a member of the preapproval group before it can enter the approval chain.

**NOTE** The user submitting the content does not need permission to create tasks.

Field	Value
Title	A string formulated by joining the
	content block title
	content block ID number
	underscore
	● "Task"
	For example, Private Content2_Task
Assigned to	The user group identified in the <b>Pre approval group:</b> field of the Application Setup screen
Assigned by	The user who submitted the content block
Content block	The content block being submitted for approval
Priority	Normal
State	Not Started
Due date	none
Start date	none
Created by	User who submitted content block
Description	none

The task has the following information.

## Manual Creation of Tasks Associated with Content Blocks

Authorized users can create tasks by selecting a content block or selecting a task.

**NOTE** Only users with permission can create tasks. See Also: "Task Permissions" on page 290

#### Creating a Task via a Content Block

To assign a task from the View Content page, follow these steps.

- 1. Select a content folder.
- 2. Select a content block.
- Access the View Content page for the content block, as described in "Viewing Content" on page 60.
- 4. Click the Add Task button (
- 5. The Add Task page appears.

Add Task	
₩ ←	
Title:	
Assigned To:	🖉 admin 🖃 Select User or Group
Content:	Select
Priority:	Normal 💌
State:	Not Started
Due Date:	
Start Date:	
User Language:	Bulgarian
Description:	
📗 Times New Roman	🔹 3 (12 pt) 🔹 🛕 🍇 🖪 🖌 🖳 A 🐇 🖹 🛍 🎘 🕬 🌱 🐝 🍓

6. Use the following table to help you complete the screen.

Field	Description
Title	Specify a title for the task (for example, "Edit this content block!")
Assigned to	Select users or user groups to which to assign the task. By default, the task is assigned to All Aothors (that is, all users with permission to edit the content block).
Content	Displays content block to which the task is being assigned
Priority	Specify a task's priority: Normal, low or high. Users can sort a list of tasks by priority.
State	Display only field. After you create a task, you can return to this screen and set this field to any state. <i>See Also:</i> "Task States" on page 297 Users can sort a list of tasks by state.
Due date	Specify when the task needs to be completed. Users can sort a list of tasks by due date.
Start date	Specify when the task should be started
Description	Enter additional comments about the task

7. Click the **Save** button ( **[]**).

The task is saved, and the View Tasks screen appears with the new task added.

#### Creating a Task via the Task Folder

You can create a task from the Tasks folder. While creating the task, select the content block to which to assign it. If the content block does not exist, you can create it then assign it to the task.

1. From the Workarea, select the Smart Desktop button.



- 2. Click the Tasks folder.
- 3. Click the Add Task button (
- 4. The Add Task page appears.
- 5. Use the following table to complete the screen.

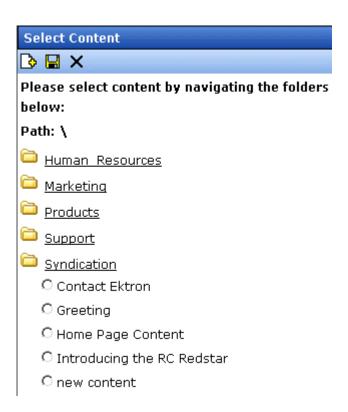
Field	Description
Title	Specify a title for the task (for example, "Edit this content block!")
Assigned to	Select users or user groups to which to assign the task. By default, the task is assigned to you.
Select Content	Click to select a content block to which to assign the task. See Also: "Selecting a Content Block for the Task" on page 306
Priority	Specify a task's priority: Normal, low or high. Users can sort a list of tasks by priority.
State	If the task is not linked to a content block, you can assign it to any state.
	See Also: "Task States" on page 297
	However, if you later link the task to a content block (via the <b>Content</b> link above), the state is determined by the content block's status.
	Users can sort a list of tasks by state.
Due date	Specify when the task needs to be completed. Users can sort a list of tasks by due date.
Start date	Specify when the task should be started
Description	Add additional comments about the task

6. Click the **Save** button ( **[]**).

The task is saved, and the View Tasks appears with the new task added.

#### Selecting a Content Block for the Task

When you click **Select Content** from the Add Task screen, the Select Content screen appears.



You should only select a content folder for which you have permissions. See Also: "Setting Permissions for a Content Folder" on page 90

To select an existing content block to assign to the task, follow these steps.

- 1. Navigate to the content block. (Click any folder to open it.)
- 2. Click inside the circle to the left of the block.



3. Press the Save button ( 🔚 ).

#### Creating a New Content Block and Linking it to a Task

You can also create a new content block to which to assign the task. To do so, follow these steps.

- 1. Navigate to the folder in which the new content block will reside. You must have permission to add a content block within this folder.
- 2. Click the Add Content button (
- 3. Follow the procedure for adding a content block, described in "Adding Content" on page 55.
- 4. Click inside the circle to the left of the block.



5. Press the Save button ( 🔚 ).

### Viewing a Task

Only the following users can view a task.

- administrators
- the user who created the task
- users to whom the task is assigned

You can view a task by navigating to the Tasks folder then selecting a task, *or* navigating to the associated content block's content folder, selecting the content block then viewing the task.

After viewing a task from the content folder, you can add a comment. In contrast, after viewing a task from the Tasks folder, you can create a new task, delete the task, view the task history, and add a task comment.

#### Viewing a Task from the Content Folder

- 1. Access the Contents folder from the left side of your Workarea.
- 2. Select the content block associated with the task.
- 3. Click the Tasks tab.



- 4. The page lists all tasks assigned to the content block.
- 5. Select a task.

From the view task page, you can add a comment to the task. See "Adding Comments to a Task" on page 315 for more information.

#### Viewing a Task from the Tasks Folder

To view a task from the Tasks folder, follow these steps.

- 1. Access the Tasks module folder, as described in "Viewing a Task" on page 307.
- 2. Using one of the options listed in "Task View Options" on page 309, click the task you want to view.
- 3. The View Task page is displayed.

From the view task page, you can perform many tasks, including:

- "Editing a Task" on page 313
- "Deleting a Task" on page 317
- "Adding Comments to a Task" on page 315
- "Viewing a Task's History" on page 312

#### **Task View Options**

Beneath the main task module folder, 14 view screens display all tasks filtered by specified categories. The categories appear in "The Tasks Folder" on page 290.

*See Also:* "Sorting Tasks" on page 310 and "Determining Which Tasks a User Can View" on page 311

After viewing tasks in any category, most screens let you perform an action on the tasks (the actions are included in the table below). For example, you can readirect your tasks to another user. To select all tasks on a screen, click the check box in the header row (illustrated below).

View Tasks Assigned To Ap	plicati	DN
←		
Assign To User: admin		
T <u>itle</u>	CID	<u>st</u>
New Form2622 Task	<u>2622</u>	C

Folder	Displays these tasks	Action you can perform from view screen
All Open	<ul> <li>All open tasks (that is, tasks in one of these states)</li> <li>not started</li> <li>active</li> <li>awaiting data</li> <li>on hold</li> <li>reopened</li> <li>pending</li> </ul>	None
Assigned To Me	All open tasks assigned to you	Assign tasks to a different user

Folder	Displays these tasks	Action you can perform from view screen
Assigned By Me	All open tasks you assigned to yourself or others	Assign tasks to a different user
Created by Me	All open tasks you created	None
Assigned to User	All open tasks assigned to a user you select	Select any user and view all tasks assigned to that user. To do so, select new user from <b>Assign to User</b> drop down list and click <b>Get Tasks</b> .
Not Started	All whose state is Not Started See Also: "Task States" on page 297	Change to any other state
Active	All whose state is Active	Change to any other state
Awaiting Data	All whose state is Awaiting Data	Change to any other state
On Hold	All whose state is On Hold	Change to any other state
Pending	All whose state is Pending	Change to any other state
Reopened	All whose state is Reopened	Change to any other state
Completed	All whose state is Completed	Change to any other state
Archived	All whose state is Archived	Change to any other state
Deleted	All whose state is Deleted	Change to any other state or purge

#### **Sorting Tasks**

On every View Tasks page, you can sort the information by most columns. Information can be sorted by the following.

Column	Click to sort tasks
Title	Alphabetically by title of associated content block

Column	Click to sort tasks
ID	Content block ID number
Assigned To	Alphabetically by user to whom the task is assigned
	Note: Once set, a task's assigned-to user does not change throughout the "life" of the task.
Assigned By	Alphabetically by user who assigned the task
Due Date	By due date, beginning with dates closest to today
State	By task state, from first to last See Also: "Task States" on page 297
Priority	By task priority. High appears first, followed by Normal then Low

### **Determining Which Tasks a User Can View**

To provide security, **Ektron CMS200/300** restricts which users can use the task views. These restrictions are listed on the following table.

View option	Administrator group member	User or group to whom task assigned	User who assigned task	User who created task	All users
All Open †	Х				
Assigned by Me		х	x		
Assigned to Me †		X			

View option	Administrator group member	User or group to whom task assigned	User who assigned task	User who created task	All users
Created by Me †				X	
Assigned to User	X	Х	X	X	X
Not Started	all tasks in specified state	only tasks assigned to			
Active		user in specified			
Awaiting data		state			
On hold					
Pending					
Reopened					
Completed		 V			
Archived					
Deleted	V				

† - user can only view "open" tasks, that is, not started, active, awaiting data, on hold, pending, or reopened

## Viewing a Task's History

**Ektron CMS200/300** maintains a history of all events in the "life" of a task, as well as any comments entered. As examples, the task history shows when and by whom the task was created, when it changed to Active, when it was linked to a content block, when its state changed, when it was approved, etc.

You can view the task's history until the task is purged. To view a task's history, follow these steps.

- 1. Navigate to the View Task screen, as explained in "Viewing a Task" on page 307.
- 2. Click the history button ( $\mathbb{P}_{1}$ ).
- 3. The history of task events appears (example below).

#### View Task History for review today

<u>Date</u>	<u>Initiator</u>	<u>Activity</u>	Information
16-Sep-2004	jedit	Creation	
16-Sep-2004	jedit	Other	Task Assigned to All Authors
16-Sep-2004	jedit	Content Linked	Plastic Molder #123(13)
16-Sep-2004	jedit	Start Date Changed	Date Set to 17-Sep-2004
16-Sep-2004	jedit	Due Date Change	Date Set to 22-Sep-2004
16-Sep-2004	jedit	Start Date Changed	Date Set to 17-Sep-2004
16-Sep-2004	jedit	Due Date Change	Date Set to 22-Sep-2004

### **Email Notification**

email notification is sent on these occasions.

- A task is redirected to a user
- A task is submitted for content approval. Sent to the first user in the approval chain.
- The approval process moves on to the next approver.
- The content is declined at an approval stage. This is sent to the assigned user.
- The content is published. This goes to the creator, assigned user, and the approvers.

# Editing a Task

#### Permission to Edit a Task

Only these users can edit a task:

- Administrator
- User who assigned the task
- User to whom the task is assigned

#### Fields that Can Be Edited

Editing a task means you can change the following information for a selected task.

- Title
- Assigned to
- Priority
- State
- **NOTE** A task's state can also be changed from several view options. See "Task View Options" on page 309
  - Due Date
  - Start Date
  - Description

#### **Editing Steps**

To edit a task, follow these steps.

- Access the View Task page for the task you want to edit, as described in "Viewing a Task from the Tasks Folder" on page 308.
- 2. Click the Edit button ([]).
- 3. The Edit Task page appears.
- 4. Make changes to the task.
- Click the Update button (
  ).

The updated task information is saved, and the updated View Task page appears.

### Adding Comments to a Task

You can add comments to a task to provide additional information about it. For example, you might add information about why a task's state changed or what caused the Due Date to move.

The comments are maintained for the life of the task, and appear on the View Task screen. (*See Also:* "Viewing a Task" on page 307)

**NOTE** Only users who can edit a task can add a task comment. See Also: "Permission to Edit a Task" on page 313

To add a comment to a task, follow these steps.

- Access the View Task page for the task, as described in "Viewing a Task from the Content Folder" on page 308 or "Viewing a Task from the Tasks Folder" on page 308.
- Click the Add Comment button (
   ).
- 3. The Comments window appears.

#### Comments:

Times New Roman 🔹 3 (12 pt) 🔹 🗛 🏂 🖪 🖌 🖳 A	
※ 単 単 や マ 学 些	
	<b>A</b>
	<b>_</b>
Insert Close	

- 4. Enter your comment in the editor. Note that a few editing buttons are available to help format the text.
- 5. Click the **Insert** button.

The comment is added to the task, and the View Task page appears with the comment displayed in the comments table at the bottom of the page.

#### **Updating Comments**

To update a task comment, follow these steps.

- **NOTE** Only users who can edit a task can update a task comment. See Also: "Permission to Edit a Task" on page 313
  - Access the View Task page for the task, as described in "Viewing a Task from the Content Folder" on page 308 or "Viewing a Task from the Tasks Folder" on page 308.
  - 2. Click the comment's **Date/Time** link (illustrated below).

Start Date: [Not Specified]

Created By: admin

Description:

[Not Specified]

#### Comments:

Date/Time	<u>Added By</u>	Comments
<u>24-Auq-</u> 2004 01:11 PM	Application Administrator	this is a comment

- 3. The Comments window opens, displaying the current comment.
- 4. Make changes to the comment.
- 5. Click the **Update** button (**I**).

### Archiving a Task

After a task is completed, you may want to change its state to Archived. Archiving moves selected tasks from the Completed tasks list to the archived list. This change cleans up the completed tasks list and makes it and easier to use.

Archived tasks are typically kept for a predetermined time period, at which point an administrator deletes them (depending on your organization's policies).

To archive a task, follow these steps.

- 1. From the Smart Desktop, open the Tasks folder.
- 2. Click the view option corresponding to the state of tasks you want to archive. Typically, you would archive completed tasks.



3. A list of Completed tasks appears. Select tasks one at a time, or click the check box on the top left corner to select all.

	<u>Title</u>
_	New Ferring on Table

- 4. Next to the **Change to State** field, click the down arrow to display the drop down list and select **Archived**.
- 5. Click the **Set** button.

### **Deleting a Task**

You can easily delete tasks no longer needed on the Web site. Although an administrator can change a task's state to deleted at any time, you typically do so after it is completed or archived, depending on your organization's policies.

Note that a deleted task remains in the system until you purge it. It is only visible on the View Deleted Tasks option. *See Also:* "Deleted" on page 300.

Tasks can be deleted either one at a time, or several at once. To delete tasks, follow these steps.

- 1. From the Smart Desktop, click the Tasks folder.
- 2. Click the view option corresponding to the state of tasks you want to delete. Typically, you would delete archived tasks.
- 3. Select tasks one at a time, or click the check box on the top left corner to select all.

[ 🗖 ] <u>Title</u>
<u> </u>
🗖 New Terrogoo, Teelu

- 4. Next to the **Change to State** field, click the down arrow to display the drop down list and select **Deleted**.
- 5. Click the **Set** button.

### Purging a Task

If you want to remove deleted tasks from the system, you purge them. Upon purging, a task and its history are removed from the database.

To purge one or more tasks, follow these steps.

- 1. From the Smart Desktop, click the Tasks folder.
- 2. Click the Deleted view option.
- 3. Select tasks one at a time, or click the check box on the top left corner to select all.

Title
<u> </u>
E New Fernogoo Teel

4. Click the **Purge** button.

# 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 any content folder in your Workarea.
- 2. The contents of the content folder are displayed.
- 3. Click the **View Collections** button ( ).
- 4. The "View Collections" page is displayed.

### **Collection Reports**

The collection reports page displays a list of all collections that have been created.

**NOTE** You can perform any action 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 the **Modules** folder buttons in the left frame of the workarea window.
- 3. Click the **Collections** folder under the Modules folder tree.
- 4. A table of all collections is displayed.

### Before You Work With Collections...

This section explains 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 action. However, basic users can be given the permissions to manage collections as well.

See "Setting Permissions" on page 87 for more information.

### **Collections Toolbar**

When working with collections, there are several toolbars and toolbar buttons that you should become familiar with. The following table lists the collection toolbar buttons.

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 324
Þ	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 328
	Remove	Allows you to remove a content block from an existing collection menu.	"Removing Content Blocks from the Collection" on page 328
₽↓	Reorder	This button allows you to reorder the group of content blocks in a collection menu.	"Reordering List of Links" on page 328
	Edit	Allows you to edit certain information of a collection menu.	"Editing a Collection" on page 329
Ū	Delete	Used to delete an existing collection menu.	"Deleting a Collection" on page 330
	Save	Used to save changes that were made.	
	Update	Used to save and update changes.	

Butto	Name	Description	More Information
÷	Back	Takes you to the previous page.	

### **Default Template vs. Quicklinks**

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	ORE 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
	1	

To toggle between a default template an quicklinks:

- 1. Access the edit collection page for the collection you want 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:

- Creating the collection
- Assigning content blocks to it

The following sections explain these steps.

#### Adding a Collection

To add a new collection for your Web site, follow the steps listed below:

- 1. Access the collections table for a content folder, as described in "Accessing the Collections Page" on page 320.
- 2. Click the Add button ( 🕂 ).
- 3. The "Add Collection" page is displayed.
- 4. 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.	

Field	Description
Include Sub-folders	Check off if you want to add content blocks that belong to sub folders of the content folder to the collection.

5. Click the Save button ( 🔛 ).

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 can assign content blocks to it. To do so, follow these steps.

- 1. Access the collection page, in the content folder, to which you want to assign content blocks.
- 2. Click the collection to which you want to assign content blocks.
- 3. The "View Collection" page is displayed
- 4. Click the **More Info** link to view the properties for the collection.
- 5. Click the **Add** button ( $\begin{pmatrix} -1 \\ -2 \end{pmatrix}$ ).
- 6. The "Add Items to Collection" page is displayed.
- 7. Check the boxes next to content block titles you want to include in your collection.

The following table will assist you with available options when assigning content blocks to the collection:

Button	Function
<mark>↔</mark>	Add selected content block(s) to collection.
D	Adds a new content block to be added to the collection.
	Displays contents in sub-folder.
<b>t</b>	Displays content is parent folder.

8. Click the **Add** button ( ) 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 want to view.
- 2. Click the **View Collections** button ( ( ).

The "View Collections" page is displayed.

- Click the title of the collection you want to view.
   The "View Collection" page is displayed.
- 4. Click 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.

Field	Description
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 actions 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 325
	Remove	Removes a content block that has been added to a collection menu.	"Removing Content Blocks from the Collection" on page 328
₿↓	Reorder	Allows you to reorder the list of links that are displayed in the collection menu.	"Reordering List of Links" on page 328
	Edit	Allows you to edit certain information about the collection menu.	"Editing a Collection" on page 329
Ũ	Delete	Deletes the collection menu.	"Deleting a Collection" on page 330
÷	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 325.

#### **Removing Content Blocks from the Collection**

To remove content blocks from a collection, perform the following steps:

- Begin by accessing the collection you want to remove a content block from as described in "Viewing a Collection" on page 326.
- 2. Click the **Remove** button ( $\square$ ).

The "Remove Items From Collection" page is displayed.

- 3. Check off the boxes next to the titles you want to delete from the collection.
- **NOTE** You may Click **Select All** or **Clear All** to either check off all the boxes or remove all check marks.
  - 4. Click the **Delete** button (1) 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:

- Begin by navigating to the collection that contains the content blocks you want to reorder as described in "Viewing a Collection" on page 326.
- 2. Click the **Reorder** button  $(2 \downarrow)$ .

The "Reorder Collection" page is displayed

- 3. Click the title of the content block you want to reorder from the list.
- 4. Click 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 the **Update** button (**I**) 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. Navigate to the collection you want to edit, as described in "Viewing a Collection" on page 326.
- 2. Click the **Edit** button ( ).
- 3. The Edit Collection page is displayed.
- 4. 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.

Field	Description
Include	Place a check in the box to allow content from sub-
Sub-folders	folders to be included in the collection.

5. Click the **Update** button (**I**) to save the changes.

The page is refreshed, and the updated collection information is displayed.

## **Deleting a Collection**

When you no longer want to keep a specific collection, you can delete if from your Web site. To delete a collection, perform the following steps:

- 1. Navigate to the collection you want to delete, as described in "Viewing a Collection" on page 326.
- 2. Click the **Delete** button ( $\square$ ).
- 3. A confirmation message is displayed.
- 4. Click OK.

# Menu Feature

Νοτε

This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

**Ektron CMS200/300**'s Menu feature lets users create and maintain a dropdown menu navigation system for your Web site. Like Collections, the Menu feature gives you the flexibility to display links to content blocks, library assets, external hyperlink and submenus.

This section only describes managing permissions to use the Menus Feature and suggestion for implementing it. For more information about using the Menus feature, see the **Ektron CMS200/300** User Manual.

### Permission to Use the Menus Feature

Only users with permission to use the Collections feature (illustrated below) can work with menus. If user does not have permission to Collections, the menus toolbar button does not appear.

View Permissions fo	or Folder "(	Content"		
The content in this members.	s folder is p	rivate and ca	n only be vie	ewed by auth(
View Standard Permis	sions 🔍			<u>View I</u>
User or Group Name	Collections	Add Folders	Edit Folders	Delete Folder
🔮 <u>admin</u> 🔮 jedit	X	×	×	×

Also, if a user has permission to Collections but Read Only permission for content and the library, he cannot add a content block from a navigation link.

### Implementation of the Menus Feature

In order for a menu to appear on your Web site, your Web developer must modify a page template to display it. This procedure is described in the **Ektron CMS200/300** Developer Manual section "Multi-Level Collection."

# 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 the **Modules** folder button from the left frame of the Workarea window.
- 3. The **Modules** Folder hierarchy is displayed
- 4. Click the **Calendar** folder from the list of folders.
- 5. The Calendar Modules page is displayed.

### Calendar Toolbar

Within the calendar modules area, several buttons (described below) help you perform actions.

Button	Name	Description	More Information
¢	Add Calendar	Accesses the add calendar page.	"Viewing Calendar Modules" on page 347
	Save	Save a calendar or calendar event being added or edited.	

Button	Name	Description	More Information
31	Show Calendar	Displays the calendar in the workarea.	"View Calendar" on page 349
E	Manage Event Types	Add, edit, and delete Event Types to and from a calendar.	
	Add Calendar Event	Accesses the add calendar event page in the workarea.	
	Edit	Edit a calendar or calendar event.	
Ū	Delete	Delete a calendar or calendar event.	"Deleting Calendar Modules" on page 351
-	Add Calendar Event	Access the add calendar event page from the calendar on the Web page.	"Adding Calendar Events" on page 352
Q	View Date	View all calendar events for a selected day.	"Viewing Calendar Events" on page 354

# 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 333.
- 2. Click the Add Calendar button (

3. 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 field.

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.

4. Type in all the necessary information for your calendar.

See "Table Properties" on page 336 and "Calendar Permissions" on page 336 for additional information.

5. Click the **Save** button ( $\square$ ).

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 for a Content Folder" on page 90 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 cannot add, edit, and delete calendars.

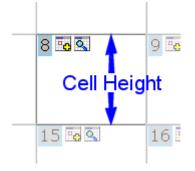
In order for a non-administrator user to add, edit, or delete calendar events, he must have add, edit, and delete permissions for the content folder with which the calendar is associated. See *Also:* "Setting Permissions" on page 87

### **Table Properties**

While adding or editing a calendar, you can define several attributes to customize its display. The following section explains the table properties attributes.

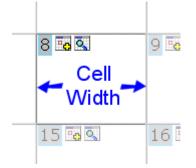
### **Cell Height**

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, the height expands to accommodate all events.



### **Cell Width**

The cell width attribute determines the width, in pixels, of each calendar cell. The width of a cell never fluctuates if the contents of the cell extend past the cell. Instead, the text wraps 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.

isplay Weekends					Do Not I	Displ	lay W	eeken	ds			
July		Augus	t 2003		Septemb			July	Aug	ust 2003	Se	ptember
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday C International Announces the RC International Announces the RC Cheetah Locationi Main Street Tracks Start: 2:00:00 PM End: 5:00:00 PM	Saturday 250		Monday	Tuesday	Wednesday	Thursday	Friday Content RC Internationa Announces the RC Cheetah Location Main Stre Tracks Starti 2:00:00 PM End: 5:00:00 PM
3 6 9	4	5 6 9	6 🚾 🔍	7 6 9		9 - 0		4 - 4	5 🖬 🔍	6 🔽	7 0	8 10 2
10 6 9	11	12 0 9.	13 Conternational Ships RC Sportster Location: Main Street Tracks Stayti 2:00:00 PM End: 4:00:00 PM	14 0	15 0 9	16 2		11 🖥 🔍	12 6	13 0 RC International Ships RC Sportster Location: Main Street	14 <b>G</b>	15 0

# 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.
а	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 want 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 want to enable Event Types for as described in "Viewing Calendar Modules" on page 347.
- 2. Click the Edit button ( 📝 ).

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 the **Save** button ( 🔚 ) 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 want to view the Event Types for as described in "Viewing Calendar Modules" on page 347.
- **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 340 for more information.

2. Click Event Types button (

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:

- 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 341.
- 2. Click the Event Types button (

It opens "View Event Types for [Calendar Name]" window. This window does not include any Event Types right now.

3. Click the **Add** button (  $rac{l}{l}$ ) 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 the **Save** button ( 🔚 ) 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 344 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 want to edit as described in "Viewing Available Event Types" on page 341.
- 2. Click the Event Types button (

It opens "View Event Types for [Calendar Name]" window which displays a list of all available Event Types

3. Click the Edit button ( 📝 ).

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 the **Edit** button ( $\bigcirc$ ) 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 the **Save** button ( 🔚 ) 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 want to delete as described in "Viewing Available Event Types" on page 341.
- 2. Click the Event Types button ( 📃 ).

It opens "View Event Types for [Calendar Name]" window which displays a list of all available Event Types.

3. Click the **Remove** button (  $\square$  ) 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 want to delete.

## **NOTE** Click either **Select All** or **Clear All** to check off all or none of the displayed Event Types.

5. Click the **Delete** button ( 1) 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:

- Begin by either adding or editing a calendar event for a calendar as described in "Adding Calendar Events" on page 352 or "Editing Calendar Events" on page 354.
- 2. Make the necessary additions/edits to the calendar event page.
- 3. In the Event Types section, Click an available Event Type in the box on the right side.
- 4. Click 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.

**NOTE** Click the Event Type in the "Selected" box and click the left arrow to de-assign the Event Type to the calendar event.

- 6. Finish making the rest of your additions/edits.
- 7. Click the **Save** button ( $\square$ ) 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:

- Begin by either adding or editing a calendar event for a calendar as described in "Adding Calendar Events" on page 352 or "Editing Calendar Events" on page 354.
- 2. In the Event Types section, Click an available Event Type in the box on the right side.
- 3. Click 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 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.
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 the **Save** button ( 🔚 ) 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:

- Begin by either adding or editing a calendar event for a calendar as described in "Adding Calendar Events" on page 352 or "Editing Calendar Events" on page 354.
- 2. In the Event Types section, Click an available Event Type in the box on the right side.
- 3. Click 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 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.	
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.	

Field	Description
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 the **Save** button ( 🔚 ) 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 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 333.
- 2. Click the title of the calendar you want 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.	
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 actions.

Button	Name	Description	More Information
31	View Calendar	Shows the calendar in the workarea.	"View Calendar" on page 349
	Edit	Opens the edit calendar page allowing you to make changes to the calendar.	"Editing Calendar Modules" on page 350
Ū	Delete	Allows you to delete the current calendar.	"Deleting Calendar Modules" on page 351
←	Back	Return to the previous page.	

The following table explains each of the displayed buttons.

#### 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 347.
- 2. Click the View Calender button ( Im).

The "Show Calendar" page is displayed in the main area of the Workarea.

**NOTE** The style sheet being applied to the calendar in the workarea is different than the one being applied to the calendar in the sample Web site. See "Calendar Style Sheet" on page 338 for more information.

From here, you can perform the following actions:

Button	Name	More Information
<b></b>	Add Calendar Event	"Adding Calendar Events" on page 352
٩	View Calendar Events	"Viewing Calendar Events" on page 354
Ŧ	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 want to edit, as described in "Viewing Calendar Modules" on page 347.
- 2. Click the **Edit** button ( **)** 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.

**NOTE** See "Table Properties" on page 336 for additional information.

4. Click 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:

- Access the view calendar page, for the calendar you want to delete, as described in "Viewing Calendar Modules" on page 347.
- 2. Click the **Delete** button ( $\boxed{\square}$ ) 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 actions to the calendar.

### **Adding Calendar Events**

To add a calendar event, perform the following steps:

- 1. Access the calendar you want to add a calendar event to as described in "View Calendar" on page 349.
- 2. Navigate to the month and day you want to add the calendar event to.
- 3. Click the **Add Event** button ( **The Internet Section** ) on the day you want 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 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 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 the dropdown list to select AM/PM for the end time.	
Start Date	Specify a start date for the event. Click the calendar button to open a calendar to select a new start date.	
End Date	Specify a end date for the event. Click the calendar button to open a calendar to select a new end date.	
No. of Events to be created		

Field	Description	
Event will occur	Select from the various options to specify when the event will occur. Click 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 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 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.	
Folder Tree	Allows you to navigate through the content folders to locate a content block to add as a calendar event.	
	Click the <b>Add Content</b> button ( ) to create a new content block that can be assigned to the calendar event.	

5. Click 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 want to view, as described in "View Calendar" on page 349.
- 2. Navigate through the calendar until you find the event you want to view.
- 3. Click the **View Date** button ( **a**] ) 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 354.
- 2. Click the Add Calendar Event button (

The "Add Calendar Event" page is displayed.

3. Follow the steps described in "Adding Calendar Events" on page 352 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 want to edit, as described in "Viewing Calendar Events" on page 354.
- 2. Click the title of the event you want 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 336 for additional information.

4. Click 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 want to delete, as described in "Viewing Calendar Events" on page 354.
- Click the title of the event you want to delete.
   The "Edit Calendar Event" page is displayed.
- 3. Click the **Delete** button ( **1**) 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.* 

# Multi-Language Support

There are several methods of implementing a multi-language Web site using Ektron CMS200/300.

There are several aspects to translating within **Ektron CMS200/ 300**. They are listed below.

Type of Translation	Seen by	For more information, see
Screens and messages	Content contributors	"Translating Screens and System Messages" on page 357
Content	Content contributors (when viewing or editing); visitors to your site	"Working with non-English Content" on page 362
Spell check dictionary	Visitors to your site	"Set the Language of Spell Checking" on page 370

## Translating Screens and System Messages

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

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

To enable any other language, translate screen labels and messages with the Language Translation Tool. Then, set the language active via the **Settings > Configuration > Language Settings** screen. You should only activate a language after you complete the translation.

### The Language Translation Tool

Ektron CMS200/300 provides a tool for translating the screen labels and system messages from English into more than 120 languages. The following instructions explain how to access, convert, and set new languages active on your Web site.

#### **Before You Begin**

Before using the language translator utility, read this section carefully to understand the security issues that can arise. When you install Ektron CMS200/300, the language translator is installed under Program Files/Ektron/CMS200/300/utilities directory. When you are ready to use the translator, move the following files to the CMS200/300sample directory located under your web root.

- lang.asp
- lang\_entry.asp
- lang\_top.asp
- lang\_englishdisplay.asp

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

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

### Accessing the Translator

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

	Language M	essage Entry	
	App Default		
1. Choose a language fro the top.	m 2. Se	lect a message til	tle on the left side.

### Selecting a Language

To select a language to which to translate English strings, use the **Language Message Entry** drop down box at the top of the page

Language Message B	Entry
Afrikaans	-
Spanish (Paraguay)	<b>A</b>
Spanish (Peru)	þt
Spanish (Puerto Rico)	
Spanish (Traditional Sort)	
Spanish (Uruguak))	
Spanish (Venezuela)	
Sutu	
Swahili (Kenya)	
Swedish	
Swedish (Finland)	
Tatar (Tatarstan)	-

When you select a language, the following screen appears.





### **String Icons**

Two string icons are used throughout the translation process.

lcon	Meaning
2	Translated string
2	Un-translated string

### **Translating Strings**

#### **Selecting String**

To translate a string, follow these steps:

1. Click the string to be translated in the left frame.



#### Message Title:

active directory group title

#### English(US) Message:

Active Directory Group

#### English(US) Comment:

Group title for Active Directory column

#### Øzech Message:

#### Czech Comment:

Group title for Active Directory column

#### Path for Czech Images:

/CMS300Sample/cms300scripts/images/Czech/

- 2. In the right frame, you can see the English version of a string. Enter the translation in the **(new language) Message** field, circled above.
- 3. Insert the translated comment in the **(new language) Comment** field (maximum75 characters).
- 4. Click the Add button (-).
- The icon next to the string you translated changes. See Also: "String Icons" on page 360

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

#### Editing a String

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

#### Images

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

#### Location of Images

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

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

**NOTE** You can copy images from the English folder into a foreign language folder, and only modify images that translating.

## Working with non-English Content

**Ektron CMS200/300** supports the creation of content in any language supported by the Unicode standard. This section explains how to create and work with content blocks in any language.

#### Overview

First, determine the languages in which your site's content should appear (see "Determining Which Languages are Available" on page 364). Then, for each content block that you want to offer in those languages, you can either create a new content block or copy and edit an existing one. For example, you can begin the creation of a German content block by copying English content into it, then translating that content into German and deleting the English content. All versions of a content block have the same ID number but are differentiated by the language attribute. The View Contents of Folder screen's **View** field lets you choose a language then view and create content blocks in that language. You can also view *all* content blocks in the folder, regardless of language. This field makes to easy to find and work on content block versions in a selected language.

View Contents of Folder "Content"				
b 🕞 🔓 🗣 👘 🖗 🖻 (	🍋 😭   Vi	ew:	English (US) 🗾 🗐	
			All	
<u>Title</u>	<u>Language</u>	ID	Danish .	
Contact Ektron	1	15	English (US) 1:22 AM	
Greeting	1	24	French (Standard) 4:03 PM	
Home Page Content	1	1	German (Standard)	
	-	~~	T 04 D 0000 40-06 AM	

The View Contents of Folder screen also displays the language of each content block. This helps you distinguish them when viewing all content blocks.

You can also set up a separate approval chain for each version of a content block.

#### Viewing Your Site in Another Language

It's easy for your site visitors to view your site in any enabled language. On any page, your developer can display a language drop-down list (illustrated below).



(For more information about the function used to display this, ecmShowSiteLanguage, see the **Ektron CMS200/300** Developer's Manual.) On the sample site provided with **Ektron CMS200/300**, this list appears in the lower right corner of the home page, but your developer can place it anywhere on any page. A visitor to your site uses this list to select a language. Then, as he browses the site, **Ektron CMS200/300** uses the following criteria to determine which version to display for each content block.

- 1. If a version of the content block is available in the selected language, display that.
- 2. If option 1 is not available, display a version of the content in the default language (defined on Application Setup screen).
- **NOTE** When **Ektron CMS200/300** is installed, the defualt language is English. You can change it in the Application Setup screen.
  - 3. If neither version is available, display nothing.

#### **Determining Which Languages are Available**

To determine which languages are available for creating content, go to the Workarea and click **Settings > Configuration > Language Settings**. The Language Settings screen lists all languages in which content can be created on your site.

To change the list, click the Edit button (). The Edit Language Setting screen appears. Check the boxes next to languages you want to make available to your content contributors.

Language settings			
$\blacksquare$ $\leftarrow$			
Language Name	ID	Enabled	
English (US)	1	•	
Arabic (Saudi Arabia)	1025		
Bulgarian	1026	<b>v</b>	
Catalan	1027		
Chinese (Taiwan)	1028		
Czech	1029		
Danish	1030	<b>v</b>	
German (Standard)	1031	<b>v</b>	
Greek	1032		
Spanish (Traditional Sort)	1034		
Finnish	1035		
French (Standard)	1036	<b>v</b>	

The checked languages populate the language drop-down list. This list of choices helps visitors to your site select a language. It's also used within **Ektron CMS200/300**, on screens that display multiple languages such as the View Contents of Folder screen (illustrated below).

View Contents of Folder "Human_Resources"					
🕒 🕞 🔓 🔜 🐂 🗞 🖻 🛤	ß	*   Viev	٧:	English (US) 📃 💆	8
				All	
Title	<u>ID</u>	<u>Status</u>		Bulgarian	Last Editor
Plastic Molder #123	13	A	3	Danish	Administrate
Servo Control Engineer #124	14	A	2	English (US) French (Standard) German (Standard)	Administrate
				German (Standard)	

If you choose only one language on the Language Settings screen, fields that prompt the user to select a language do not appear in **Ektron CMS200/300**.

#### Disabling a Language that has Content Blocks

If you disable a language for which content blocks exist, those content blocks remain in the database but no one can access them, either from within **Ektron CMS200/300** or when visiting your site.

If you later enable that language again, the content blocks are once again available.

### Working with non-English Content Blocks

#### Creating a New non-English Content Block

To create a content block in a non-English language, follow these steps.

- 1. Navigate to the content folder in which you want to create the content block. (You must have permission to add content to the folder.)
- 2. From the language drop-down list, select the language in which you want to create the content.



If the desired language is not available, see "Determining Which Languages are Available" on page 364.

 Click the Add Content button ( ) and create the content as you would any content block. See Also: "Adding Content" on page 55

#### Translating a Content Block to Another Language

Use this procedure when you want to initialize a new foreign language content block with content from a source language. This copying should facilitate the translation. For example, an editor is translating content from French to German. The editor copies the French version to a new content block whose language is German. As the editor translates the French version into German, he deletes the French content. Any images in the content would usually remain, and all formatting (tables, bullets, etc.) is retained.

To copy a content block into a new content block of a different language, follow these steps.

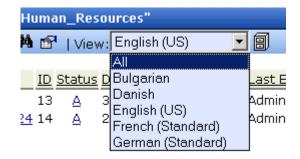
- 1. Go to the View Content screen for the content block you want to translate.
- 2. From the View drop-down list, select a original language.
- 3. Click the content block that you want to translate.
- 4. It appears on the View Content screen.
- 5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content.



- 6. The original language content appears. Translate into the new laguage then delete the original content.
- 7. When you save the content block, it is saved as the version of that content block in the selected language.

#### Viewing a Foreign Language Content Block

- 1. Navigate to the folder that contains the content block.
- 2. Click the **View** language drop-down list and select the desired language.



3. Only content blocks in that folder and the selected language appear.

You can perform the same activities with these content blocks as any other content block.

### **Approving Foreign Content Blocks**

Just as you can create separate versions of content blocks for each enabled language, you can set up a language-specific approval chain. When determining the approval chain for a folder, you first select a language then select users and groups for authority to approve content blocks in that folder and that language.

The screen below shows the language selection drop-down list on the View Approvals screen.

View Approvals for the Folder "Content"				
🕂 📝 🔶   Approval Type:	English (US)	*		
Approval Method: Force All Approvers	English (US) French (Standard) German (Standard)			
User or Group Name			ID	

Only users with language-specific approval to a folder can approve the content block.

### Working with Tasks in a non-English Language

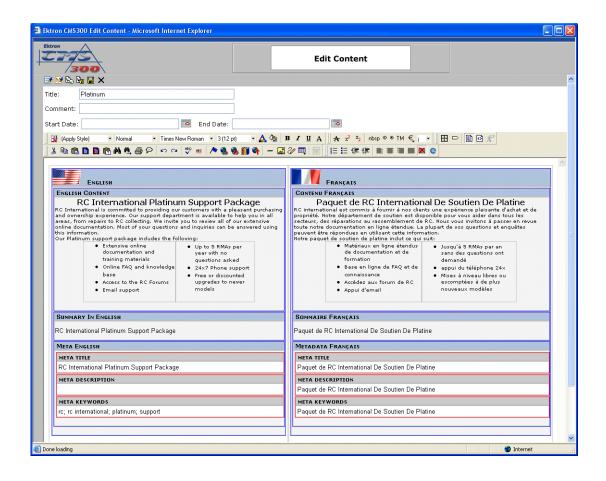
Whenever you create a task, you can assign a foreign language to it.

## Multi-Language Support via XSLTs

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	French Content	
English Summary	French Summary	
<ul> <li>English Metadata</li> </ul>	French Metadata	
– Title	– Title	
<ul> <li>Description</li> </ul>	<ul> <li>Description</li> </ul>	
<ul> <li>Keywords</li> </ul>	<ul> <li>Keywords</li> </ul>	

When different XSLTs are applied to this content, the content is displayed in the language that is defined in the XSLT.

## Set the Language of Spell Checking

To specify which dictionary to reference when checking spelling, specify a language in Microsoft Word, version 2000 or later. To do this, open Word and select **Tools >Language > Set Language**.

# Microsoft SharePoint Portal Server Integration

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This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

## 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 move on to "Ektron CMS200/300 Web Parts" on page 385 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 actions 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. Move the installation file, SharePointForCMS.exe, to your SharePoint Portal Server.
- 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 <b>Next</b> to proceed.
CMS300 Integration for SharePoint Portal 2003 Setup       Image: Comparison of the comparison of t	The CMS Cab Files screen is displayed.
InstallSitied < geok <u>Next</u> Cancel	

Setup Screen	Action
CMS300 Integration for SharePoint Portal 2003 Setup       X         CMS CAB Files       Setup needs to initial some component files (web parts). Please select where you would like to initial them to.         Initial from Component files (web parts). Please select where you would like to initial them to.       Destination Foldet         C.Program Files/Elitron/CMS300/SharePoint2003       Bjowze         Install/Sirkdd       < Back       Lext>	<ol> <li>Specify the location on your SharePoint server where you want to install the Ektron CMS200/300 Web Part CAB files Click <b>Browse</b> to specify a directory other than the default.</li> <li>Click <b>Next</b> to proceed. The SharePoint Portal Site Location screen is displayed.</li> </ol>
CM5300 Integration for SharePoint Portal 2003 Setup       X         SharePoint Portal Site Location       Setup needs the location of your SharePointPortal web: config file. Please select the root location to your SharePointPortal at a.         Destination Folder:       C.Vnepublywww.root         E.Vnepublywww.root       Browze.	<ol> <li>Specify the root directory of your SharePoint Portal site (the directory that contains your Web.config file). Click <b>Browse</b> to specify a directory other than the default.</li> <li>Click <b>Next</b> to proceed. The CMS Host Path screen is displayed.</li> </ol>

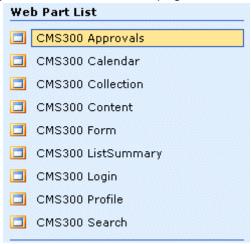
Setup Screen	Action
CMS300 Integration for SharePoint Portal 2003 Setup       CMS Host Path       Setup needs your host path to your CMS300 site.       [Mtp://locahost/CMS300Sample]	<ol> <li>Type in the fully qualified path of your Ektron CMS200/300 Web site's root directory.</li> <li>For example, http://www.YourSite.com/ CMS300Sample</li> <li>Click Next to proceed.</li> <li>The installation performs the Web part registrations. When complete, the Installation Complete screen is displayed.</li> </ol>
CMS300 Integration for SharePoint Portal 2003 Setup         InstallShield Wizard Complete         The InstallShield Wizard has successfully instaled CMS300 Integration for SharePoint Portal 2003. Clock Finish to exit the weard.         InstallShield          Kinstell Shield          Kinstell          Kinstell	<ol> <li>Click Finish to exit the installation program.</li> <li>The necessary Ektron CMS200/300 integration files and settings are installed and configured on your SharePoint Portal Server.</li> </ol>

#### 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 380 for information about beginning to work with the Ektron CMS200/ 300 Web parts.

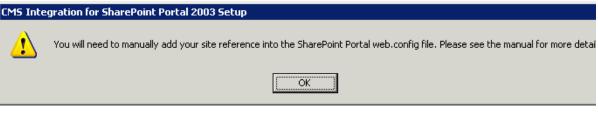
If the installation was not successful, see "Installation Troubleshooting" on page 376 for information about how to remedy possible problems.

#### 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 378 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.

#### CMS Integration for SharePoint Portal 2003 Setup



You will need to manually add your site reference into the SharePoint Portal web.config file. Please see the manual for more detai



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 378 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 actions that you must perform.

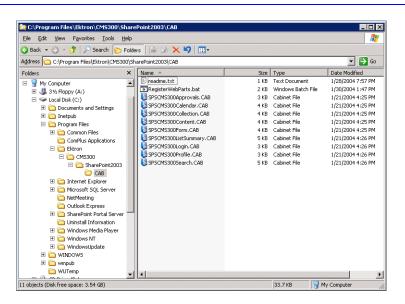
#### Registering Ektron CMS200/300 Web Parts as Safe Controls

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"



 Double-Click RegisterWebParts.bat to perform the batch file that registers all the Ektron CMS200/300 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="CMS300Form" Namespace="CMS300Form" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS300Collection" Namespace="CMS300Collection" 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.
- 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.

🗿 SharepointMain - E	dit: Ektron CMS300 Integration	- Microsoft Internet Explorer			
Ele Edit View Fav	rorites <u>T</u> ools <u>H</u> elp				A*
Back Forward	Stop Refresh Home	🔎 숡 😚 Search Favorites Media	😸 😂 🍇 History Mail Print	Edit Discuss	AIM
Address 🕘 http://192.16	58.0.36/C1/Ektron%20CMS300%20Inte	gration/default.aspx?Mode=Edit&Pac	geView=Shared		👻 🔁 Go 🕴 Links
Microsoft Office	al Server 2003 Jews Sites Ektron CM5300	Samples Jeff demo Ektr	ron CM5300 Integration	My S Create Subarea	Site Site Settings Help 🦉
	SharepointMain		🥕 This i	opic 💌	3
Current Location	Web Part Zone	ntegration			🕵 Modify Shared Page 🕶
✓ Home		·	Top Zone		
Ektron CMS300 Integration • Create Subarea	CMS300 Content	Welcome	to RC International!	Wel	b Part
Actions 9 Create Subarea 9 Change Settings 9 Manage Security 9 Manage Content 9 Manage Portal Site 9 Add to My Links	RC International is dedicate International has become or and the enthusiasts who pla affordable products and hop	ne of the leading manufactur y it, has endeared our produ	res of RC racing and flyin icts to the RC community	g vehicles. Our dedic	ation to the sport,
a Alert Me	CMS300 Calendar		<b>▼</b> ×	CMS300 Collection	<b>▼</b> ×
9 View Page	CONTRACTOR OF A CONTRACTOR OF	anuary 2004	Eebruary	RC Sportster	
	Monday Tuesday	Wednesday Thurs 1	and the second se	Part Page	) =
	51 6I	7 8	gl	RC Redstar	×
			Bottom Zone		
	CMS300 Search	Search ③ All the words	s 🔘 Any of the words 🤇	Exact Phrase 🗌 Ma	▼ X itch Partial Words
े					Internet

# 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:

Туре	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:
	<ul> <li>You may have permission to modify only some types of Web Parts on certain Web Part Pages, but not on other Web Part Pages.</li> </ul>
	<ul> <li>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.</li> </ul>

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).

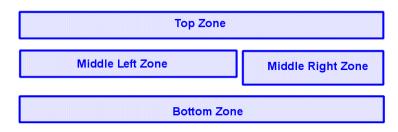
#### Web Part "Zones"

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.



# **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.
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 **Modify Shared Page** or **Modify My Page** (depending on your current settings

A sub menu is displayed.

2. Click **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.

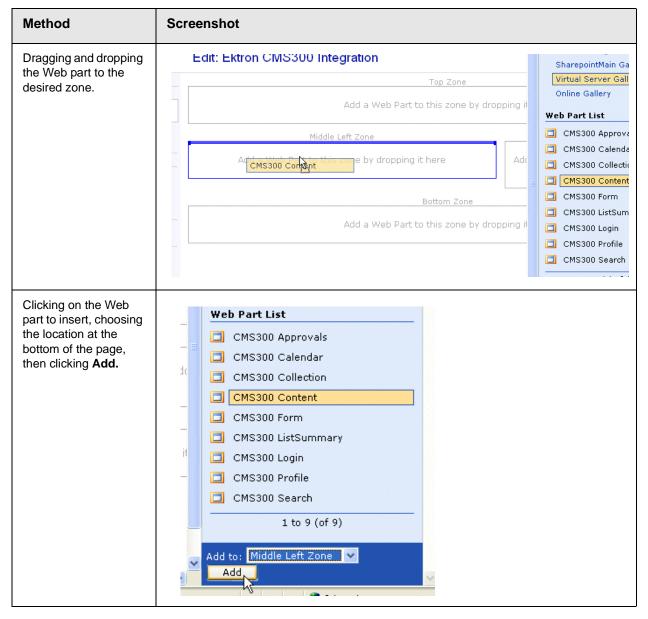
- 1. Begin by logging into your SharePoint Portal Server.
- 2. **Create** or **navigate** to the area that contains the Web part zones where you want to insert an Ektron CMS200/300 Web part to.
- Click the Edit Page at the bottom of the left navigation menu. You are now in "Edit Page Mode".
- 4. Click **Modify Shared Page**, **Add Web Parts**, then **Browse** The Web part zones are displayed, and the Add Web Parts

#### 5. Click Virtual Server Gallery

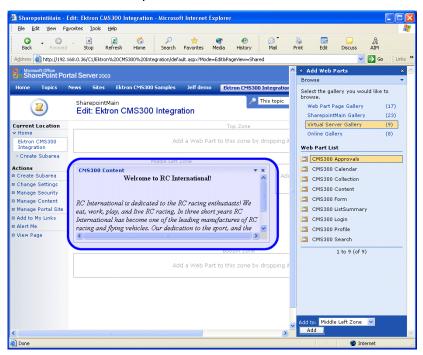
A list of all Web parts that have been added to the Virtual Server Gallery, including the Ektron CMS200/300 Web parts, are displayed at the bottom of the page

**NOTE** For information about each of the available Ektron CMS200/300 Web parts, see "Managing Ektron CMS200/300 Web Parts" on page 388.

menu appears on the right side of the screen.



#### 6. Insert an Ektron CMS200/300 Web part one of two ways:



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.

Νοτε

E 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.
- Click Edit Page at the bottom of the left navigation menu. You are now in "Edit Page Mode."
- 4. Click the **Down Arrow** ( ) at the top right corner of the Web part you want to modify.

The Web Part Menu is displayed.

5. Click 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 CMS200/300 Web parts can be found in "Managing Ektron CMS200/300 Web Parts" on page 388.
  - 7. Click 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.

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 389
Calendar	Displays a calender created for the Ektron CMS200/300 Web site.	"Calendar Web Part" on page 390
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 392
Content	Displays a content block created for the Ektron CMS200/ 300 Web site.	"Content Web Part" on page 394
Form	Displays a form content block created in the Ektron CMS200/300 Web site.	"Form Content Block Web Part" on page 396
Summary List	Displays a summary list for a specified content folder in the Ektron CMS200/300 Web site.	"Summary List Web Part" on page 399
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 402
Profile	Displays configurable profile settings for the logged in Ektron CMS200/300 user.	"Profile Web Part" on page 403
Search	Displays Ektron CMS200/300 Web site search box and search results	"Search Web Part" on page 405

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

# 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.

**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 402 for additional information.

Displayed here is an example of the approvals Web part displayed in SharePoint Server.

SharepointMain Edit: Ektron CMS300 Inte	egration	1	iis topic 🛛 💌	🛃 🖉 🕹 🕹 🕹
CMS300 Approvals		Арр	rovals W	
View All Content Awaiting App	roval			
B				
Select All Clear All				
Title	Request Type	Start Date	Submitted by	Path
Trinity In-Line Pipe	Publish	[None Specified]	Edit, John	7

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.

Edit: Ektron CM	S300 Integration			Modify Shared Page
CMS300 Calendar		Top Zope	Calenda	ar Web Part
December		January 20	004	February 📤
Monday	Tuesday	Wednesday	Thursday	Friday
			1	2 5 9
5 🗖 🔍	6 🖬 🔍	7 🖬 🔍	8 💀 🔍	9 ••• •
12 6	13 🖬 🔍	14 🖪 🔍	15 🐱 🔍	16 🐱 🔍
19 50 🔍	20 6	21 6	22 🐱 🔍	23 🐱 🔍

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 402 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 387.
- 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 want to be displayed.
- 4. Click the **Apply** button (<u>Apply</u>) for the changes to take effect without closing the menu.

The page is refreshed with the updated calendar displayed.

 Make any other additional changes to the Calendar Web part, or Click 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.

Actions 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 actions.

#### **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.

Collection Web Part	6
CMS300 Collection	× ^
<u>Plastic Molder #123</u> (Oct 30, 2002) RC International is looking for an experienced plastics molder.	=
Servo Control Engineer #124 (Oct 29, 2002) RC International is looked for a highly skilled servo control engineer	
to join our team.	•

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 actions to the collections.

**NOTE** See "Login Web Part" on page 402 for information about adding a login Web part and logging into the Ektron CMS200/300 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 want 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 387.
- 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 want 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 the **Apply** button for the changes to take effect.

The page is refreshed with the updated collection displayed.

 Make any other additional changes to the collection Web part, or Click the OK button 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 action on the collection, assuming you have the proper permissions.

Some collection related actions 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 402 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.



 Perform actions by using the toolbar button 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.

SharepointMain Edit: Ektron CMS300 Integration	This topic	≥ age ▼
CMS300 Content	Content Web Part	×
[가요따라 왕 & Welcome to RC Ir	nternational!	S)
RC International is dedicated to the RC racing enthusiasts! short years RC International has become one of the leading dedication to the sport, and the enthusiasts who play it, has	manufactures of RC racing and flying vehicles. Our	~
Middle Left Zone	Middle Right Zone	

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 395 for more information).

**NOTE** See "Login Web Part" on page 402 for information about adding a login Web part and logging into the Ektron CMS200/300 web site via SharePoint Server.

#### 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 387.
- 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 want to be displayed.
- 4. Click the **Apply** button 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** 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 actions 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 "Login Web Part" on page 402 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.

# Edit: Ektron CMISSOU Integration

 Perform actions by using the toolbar button 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.

SharepointMain		This topic		Ð
Edit: Ektron CMS3	ou integration		ntent Block	v Shared Page ▼
CMS300 Form				
First Name:				
Last Name:				=
Email:				
Ektron Product:	CMS300			
			~	
Comments:				
			~	~
	Middle Lett Zone		Miladie Right 200	R

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 398 for more information).

**NOTE** See "Login Web Part" on page 402 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 387.
- 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 want to be displayed.
- 4. Click the **Apply** button 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 the **OK** button 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 actions 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 402 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.

MS300 Form	10	Form Content Web Par	
℣℔Ũⅆ⅋ୡ			-
First Name:			
Last Name:			
		-	
Email:			
Ektron Product:	CMS300		
			<u>^</u>
Comments:			
Commenter			
			× .

 Perform actions by using the toolbar button 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.

CMS400 ListSummary	List Summary Web Part
\$ @ <b>`</b>	
Contact Ektron	
Greeting	
<u>Home Page Content</u>	
Introducing the RC Redstar	
Login Information	
Support Page	
<u>Trinity In-Line Pipe</u>	

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 401 for more information).

**NOTE** See "Login Web Part" on page 402 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 387.
- 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: " <b>\Products\RC Cars</b> " or " <b>\</b> " (root content folder)	\
Recursive	<ul> <li>Used to specify whether the summary list will contain summary information from the starting folder's sub-folders.</li> <li>No - summary list is not recursive</li> <li>Yes - summary list is recursive</li> </ul>	No
Show Summary	<ul> <li>Used to specify if the summaries for the summary list will be displayed or not.</li> <li>No - summaries are not displayed</li> <li>Yes - summaries are displayed</li> </ul>	No
Style Information	Insert an inline style which is applied to the hyperlinks generated by the summary list. Example: <b>backgroundcolor:#cccccc; border:solid blue 1pt;</b>	
Order By	<ul> <li>Choose how you want to order the summary list by.</li> <li>Title - title of the content block</li> <li>DateModified - date the content was last modified</li> <li>DateCreated - date the content was created</li> <li>AuthorFname - first name of the last editor.</li> <li>AuthorLname - last name of the last editor</li> </ul>	Title

Field	Description	Default
Order By Asc/ Desc	<ul> <li>Choose the direction you want to order the summary list by.</li> <li>Asc - sort results in ascending order (A &gt;Z)</li> <li>Desc - sort results in descending order (Z&gt;A)</li> </ul>	Asc
Show Info	<ul> <li>Choose additional information to be displayed in the summary list.</li> <li>None - no additional information</li> <li>DateModified - date and time content was last modified</li> <li>DateCreated - date and time content was created</li> <li>AuthorFname - first name of the last editor</li> <li>AuthorLname - last name of the last editor</li> </ul>	None
Maximum Number	Specify the maximum amount of results you want to display. Note: "0" displays unlimited, or all, results.	0 (unlimited)

- Click the **Apply** button for the changes to take effect. The page is refreshed with the updated summary list is displayed.
- Make any other additional changes to the List Summary Web part, or Click the OK button 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 402 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.

	50 M (5	odify Shared Page 🔻
CMS300 ListSummary	List Summary Web Part	• ×
▶ 📽 🍣 👗		
Contact Ektron		
Greeting		
Home Page Content		
Introducing the RC Redstar		3
Login Information		
Support Page		
Trinity In-Line Pipe		<u>×</u>

 Perform actions by using the toolbar button 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.

CMS300 Login	Login Web Part
& Logout Workarea (/Preview)	Ad

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 action.

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 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 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 402 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 404 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:

**NOTE** Before you can update profile information, you must first be logged into your Ektron CMS200/300 Web site via SharePoint. See "Logging Into a Ektron CMS200/300 Web Site Via SharePoint Server" on page 403 for more information. 1. Access the SharePoint portal page that contains the Ektron CMS200/300 profile Web part.

View User Inform	ation "jedit"	
2		
Username:	jedit	
First Name:	John	
Last Name:	Edit	
User Language:	App Default	
E-Mail Address:	[None Specified]	
E-Mail Notificatior	s: E-Mail Disabled	
This User current	y belongs to these User Groups:	

2. Click the **Edit** button ()) 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 the **Update** button (**I**) 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 387.
- 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: " <b>\Products\RC Cars</b> " or " <b>\</b> " (root content folder)	\
Recursive	<ul> <li>Used to specify whether the search will search the starting folder and its sub-folders or only the starting folder</li> <li>No - search only searches the starting folder</li> <li>Yes - search will search the starting folder and its sub-folders</li> </ul>	No
Target Page	When the search is performed, the target page is the Web page that will contain all the results.	search- display.aspx

Field	Description	Default
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
	• No - search options are lined up vertically.	
	• Yes - search options are lined up horizontally.	
Return: Maximum Results	Allow you to control the maximum amount of search results that are displayed.	0
	Note: "0" displays unlimited, or all, results.	
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 the **Apply** button (<u>Apply</u>) for the changes to take effect.

The page is refreshed with the updated search Web part is displayed.

 Make any other additional changes to the search Web part, or Click 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.

ĥ	Search Web Part
MS300 Search	* ×
Search	
All the words Any of the words	
Exact Phrase	
Match Partial Words	

- 2. Enter your search criteria in the search text box.
- 3. Perform the search by clicking **Search**

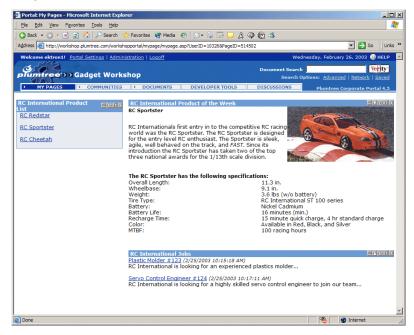
The search is performed, and all the content on your Ektron CMS200/300 Web site that matched the criteria is displayed.

# **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.

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.

It uses the following parameters:

#### 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

Νοτε	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.	
Νοτε	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**

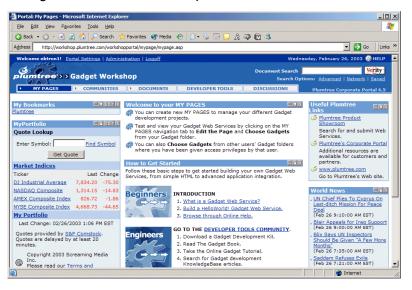
Once you have installed Ektron CMS200/300, the Plumtree GDK for ASP, and have logged into your portal, you may begin the process of registering the Gadgets to the portal.

To register a Gadget in the Portal, you need to access and perform the Add Gadget Wizard which will assist you through the process. **NOTE** Refer to help documentation from Plumtree for additional information about registering a Gadget to the portal.

### 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.



**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. Click the Administration menu link at the top of the portal.

The "Portal Administration" page is displayed.

3. Click 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 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.

**NOTE** The steps described in this section provide the minimum amount of information that is required. Refer to Plumtree help documentation to further extend your Gadgets.

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 415.
- 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</gadget></domain>
Gateway URL Prefixes	Specifying a Gateway URL ensures that proper content will be displayed in the portal. http:// <domain>/CMS200/300Sample/</domain>

### 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/

**Note** For other Ektron CMS200/300 Gadgets, use the following: instead - Content Gadget - content\_gadget.asp

- Collection Gadget - collection\_gadget.asp

### 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</gadgetsettings></domain>	

### 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

Νοτε

- 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	ListSummary Settings - Microsoft Inte.,	<ul> <li>Folder Name - Specify the Ektron CMS200/300 content folder to use.</li> <li>Recursive - Check off to also use the specified folder's sub-folders.</li> <li>MaxNumber - Specify the maximum number of results to display.</li> </ul>
Content	Content Settings - Microsoft Inter	• <b>Content ID</b> - 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 Settings - Microsoft Inter	<ul> <li>Collection Title - Select the collection from your Ektron CMS200/300 Web site that will be displayed.</li> <li>Display Function - Select the display function that is used to format the display of the collection.</li> </ul>

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</gadgetsettings></domain>

### 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.

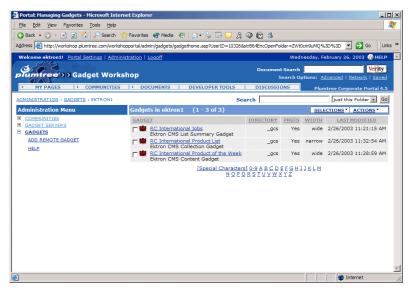
The "Security Settings" page is displayed.

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.

Νοτε

**TE** 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.

 Follow the path: My Pages > Create New Page and Click 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.

- **NOTE** You may choose any gadgets you want at this step. This section will use the gadgets that we registered in "Registering a Gadget to the Portal" on page 414.
  - 5. Click 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 want 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.

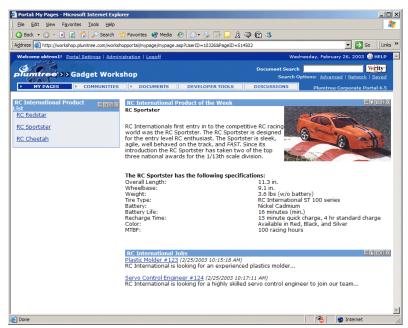
 Once you have selected all the Gadgets you want to add to your new page, click the NEXT >> button.

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 424 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.

Νοτε

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.

Select the page you want to add the Gadget to from the My Page menu.

The selected page is displayed.

 Follow the path My Pages > Edit This Page then Click Choose Gadgets.

The "Choose Gadgets" page is displayed.

Click 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 want 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 424 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	List Summary Gadget Settings   Showsummary:   Orderby:   Title   Asc   Showinfo:   DateModified   Maxnumber:   (0=all)   Open Links in New Window:   Save   Cancel	<ul> <li>ShowSummary - check off to display the summaries for the content.</li> <li>OrderBy - Select how the results will be ordered.</li> <li>ShowInfo - Select which type of information will be displayed with the results</li> <li>MaxNumber - Specify the maximum amount of results that will be displayed (cannot exceed admin settings)</li> <li>Open Links In New Window - Check off to force links to open in a new window.</li> </ul>
Collection	Collection User Settings Open Links in New Window: Save Cancel	<ul> <li>Open Links In New Window - Check off to force links to open in a new window.</li> </ul>

Gadget	Settings Page	Description
Content (Admin only)	Content Admin Settings Content ID: 4 Save Cancel	<ul> <li>Content ID - Specify the ID number of the content block that will be dis- played.</li> </ul>

### 3. Click Save.

The page now displays the Gadgets with the updated settings.

### **Administrator Preferences**

To access the administrator settings for the Gadgets:

- Click the Administration menu link at the top of the portal. The "Portal Administration" page is displayed.
- 2. Click 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.

- 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 want to access the administrative preferences for.

The "Gadget Editor" page is displayed.

 Click Alignment and Administrative Preferences.
 The "Alignment and Administrative Preferences" page is displayed.

### 6. Click 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	ListSummary Settings - Microsoft Inte	<ul> <li>Folder Name - Specify the Ektron CMS200/300 content folder to use.</li> <li>Recursive - Check off to also use the specified folder's sub-folders.</li> <li>MaxNumber - Specify the maximum number of results to display.</li> </ul>
Content	Content Settings - Microsoft Inter	<ul> <li>Content ID - Enter the ID number of the content block from your Ektron CMS200/ 300 Web site that will be displayed in the portal.</li> </ul>
Collection	Collection Settings - Microsoft Inter.	<ul> <li>Collection Title - Select the collection from your Ektron CMS200/300 Web site that will be displayed.</li> <li>Display Function - Select the display function that is used to format the display of the collection.</li> </ul>

- 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**

Νοτε

This feature is not available with Ektron CMS200. If you are using CMS200 and want to upgrade to CMS300, please contact your Ektron sales representative at sales@ektron.com.

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.* 

# 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

This example uses 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.

Ektron CMS Add Co	ontent - Microsoft Inte	rnet Explorer								_ 🗆 🗵
Ektron	7		Ad	d Conten	t					
	🗈 🔓 🖬 🗙									
	Title: Curren	t Weather in I	New Hampshire		]					
	Comment:				🗹 Ad	d to Qui	cklink	s tab	le	
	Start Date:			End Date:						ø
	🛛 🛃 (Apply Style)	<ul> <li>Normal</li> </ul>	<ul> <li>Verdana</li> </ul>	• 2(10)	x) 💌	A 👌	В.	<u>u</u>	A	x <sup>2</sup> x <sub>2</sub>
	🛛 🐰 🖻 🛍 🗎 🛛									
	_ nbsp © ● TM €	i 🔹 🛛 🖽 🤉	>	目律律	E = 3		e			
		à	18°F							<u> </u>
	Partly Clo	oudy	Feels Like 5°F							
	UV Index:	1 Minima								
	Dew Point:	0°F								
	Humidity: Visibility:	37% Unlimited								
	Pressure:		hes and falling							
	Wind:		Northwest at							
		12 mph								
1										
🔛 ektron, inc.										v
🛃 Done loading								Inter	net	

After we create content, we can publish it so that it is live on the Ektron CMS200/300 Web site.

http://127.0.0.1/cms	00RCsample/index.asp?id=19 - M	crosoft Internet Explorer		_	
Eile Edit View Fav	rites <u>T</u> ools <u>H</u> elp				-
🔇 Back 🝷 🕥 👻 💌	👔 🐔 🔎 Search 🛭 👷 Favorites 🗕	🎙 Media 🛛 🙆 - 🌭 🖬 - 🖵 🎘 🗭 🕅 🆄			
Address 🙋 http://127.0.	1.1/cms300RCsample/index.asp?id=19			💌 🄁 Go 🛛 Li	inks »
RC Inte	rnational				<u></u>
iome   Products	Support   News   Careers   S	Search	Login	Contact Ektron	
D' Th T 🖻 📽 🤞					
	<b>18°</b>	F			
Partly Cl	oudy Feels Li 5°F	ke			
UV Index:	1 Minimal				
Dew Point:	0°F				
Humidity:	37%				
Visibility:	Unlimited				
Pressure:	30.05 inches and falling				
Wind:	From the Northwest at 1	2 mph			

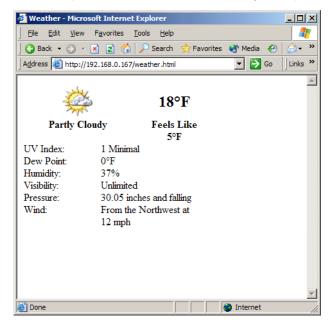
After the content block has been published, and we know its ID number (in this case ID=19), we can create a static HTML page to display this content.

Shown below is the code for the HTML page that we will create.

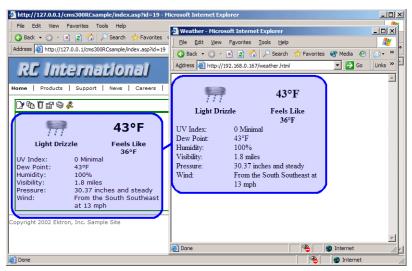
In this code, the source (src) of the script is made up of three parts:

- 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 js0bj = 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
응>
document.writeln('<% Response.write(</pre>
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.

# Load Balancing

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.

Νοτε

Refer to "Load Balancing" on page 118 for additional information about setting up load balance paths in Ektron CMS200/300.

### 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 only need to upload once. The load balancing feature replicates the image or file in each directory specified by Ektron CMS200/300.

# How Do I Configure Load Balancing?

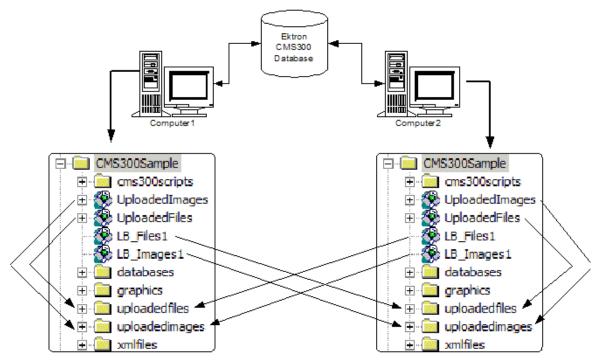
Setting up Ektron CMS200/300 for load balancing requires additional setting up outside of Ektron CMS200/300. Some actions you need to perform include:

- 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 118

The following chapter looks 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, 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 look 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 4.7, Revision 1* for additional information on performing an install.
  - 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**

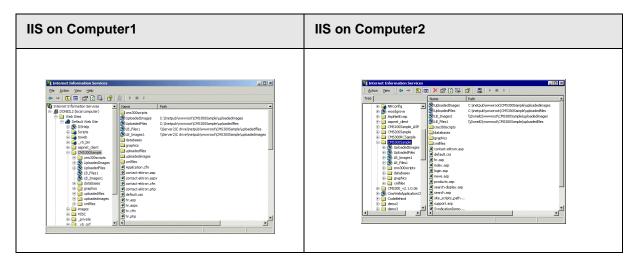
Through Internet Information Services (IIS) on both Web servers, you need to create virtual directories for each of the image or file folders that will be used with your load balancing model. In addition to this, it is recommended that you change the default "UploadedImages" and "UploadedFiles' directories 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.



### 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:

- Internet Information Services

   File Action Yew Help

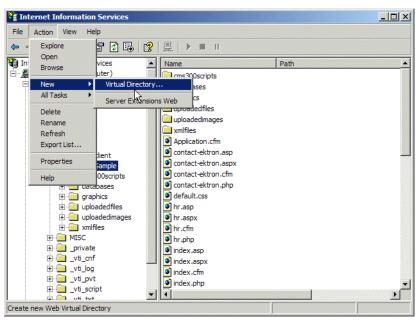
   Image: Services

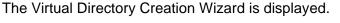
   Image: Services
- 1. Begin by accessing your IIS management console.

 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"

Internet Information Services			<u>_                                    </u>
Eile Action View Help			
Internet Information Services  DONEL2 (local computer)  ONEL2 (local computer	Name cms300scripts databases graphics uploadedfiles uploadedfiles winfiles Application.cfm contact-ektron.aspx contact-ektron.aspx contact-ektron.aspx contact-ektron.ofm contact-ektron.ofm contact-ektron.ofm contact-ektron.ofm contact-ektron.aspx	Path	×

3. In the toolbar at the top of the page, follow the path Action > New > Virtual Directory...







4. Click the **Next** button to proceed.

The Virtual Directory Alias page is displayed.

Virtual Directory	Creation Wizard			X
Virtual Director You must give	r <b>y Alias</b> e the virtual directory a s	short name, or alias, f	or quick reference.	
	s you want to use to gai conventions that you w			e the
<u>A</u> lias:				
		< <u>B</u> ack	<u>N</u> ext >	Cancel

 Enter an alias for the virtual directory. This will be the name that is used to reference the virtual directory in Ektron CMS200/ 300.

<u>A</u> lias:	
LB_Images1	

6. Click the **Next** button to continue.

The Web Site Content Directory screen is displayed.

Virtual Directory Creation Wizard		×
Web Site Content Directory Where is the content you want to put	blish on the Web site?	E State
Enter the path to the directory that co	ontains the content.	
Directory:		
		Browse
	< Back Next	Cancel

7. Enter the path to the directory that will be used for the virtual directory, or click the browse button to locate it.

Server2\	C drive\inetpub\wwwroot\CMS300Sample\uploadedimag	Browse
----------	---	--------

Νοτε

The path is constructed using \\{ComputerName}\{FilePath} format

8. Click the **Next** button to continue.

The Username and Password screen is displayed.

Virtual Directory Creation Wizard		×
User Name and Password Specify a user name and password to preven network resource.	t unauthorized access to the	
Enter the user name and password that will be resource.	e used to gain access to the netv	vork
User name:		
	Browse	
Password:		
E	< <u>B</u> ack <u>N</u> ext>	Cancel

9. Enter a username and password combination for a user that has permissions to access the directory specified in step 7.

ektron1\doneil	Browse
Password:	
•••••	

10. Click the **Next** button to continue.

A password confirmation box is displayed.

Confirm Pa	ssword		×
Please re-er	nter the password t	o confirm:	
I			
	ОК	Cancel	

11. Confirm the password that you specified in step nine by retyping it in the given field.

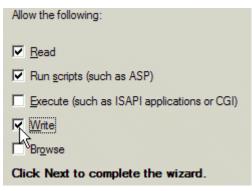


12. Click the OK button to continue.

The Access Permissions screen is displayed.

Virtual Directory Creation Wizard
Access Permissions What access permissions do you want to set for this virtual directory?
Allow the following:
✓ Run scripts (such as ASP)
Execute (such as ISAPI applications or CGI)
☐ <u>W</u> rite
Erowse
Click Next to complete the wizard.
< <u>B</u> ack <u>N</u> ext > Cancel

13. Check off the permissions that you want to allow for the virtual folder.



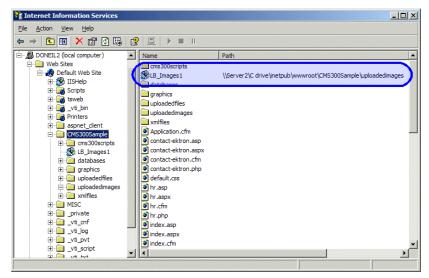
#### **NOTE** At a minimum, the IIS user will need read and write permissions.

14. Click 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.



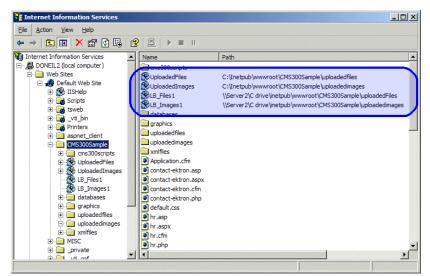
- Repeat steps 1-16 for each virtual directory that you need to create on each of the Web servers that are running Ektron CMS200/300.
- **NOTE** Remember, the names of the virtual directories on each server that is used must be identical!

### 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.

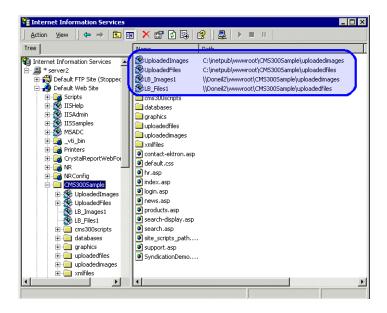
### Review

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 118.

To add a load balance path in Ektron CMS200/300:

- 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 438, as an administrator.
- **NOTE** Refer to "Logging Into Your Ektron CMS200/300 Web Site" on page 11 for additional information.
  - Access the load balance settings page in the library folder as described in "Accessing Library Load Balancing Page" on page 119.

🚰 Ektron CM5300 Workarea for i	Application Administrator - Microsoft Internet Explorer	
CMs300	WORKAREA	User: admin Thursday, May 27, 2004
🗉 🧧 🗸	View Library Load Balance Settings	
Library	★ ← Web Path Type Relative Verified	Physical Path
Content		
S Forms		
🔝 Library		
🛄 Modules		
뤚 Settings		
÷		

3. Click 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."

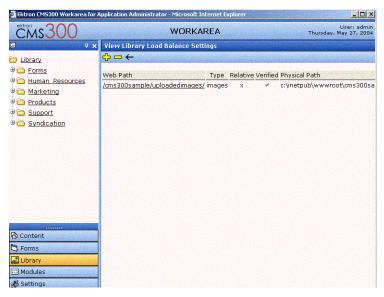


5. Click the **Save** button to save and add the new load balance folder to the Ektron CMS200/300 library.

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

Ektron CM5300 Workarea for Application Administrator - Microsoft Internet Explorer					
CMS300	WORKAI	REA		a cherry a	Thursd
E 7 ×	View Library Load Balance Sett	ings			
🗁 Library	<b>↔ ←</b>				
Eorms	Web Path	Туре	Relative	Verified	Physical Path
	/cms300sample/uploadedimages/	-		•	c:\inetpub\ww

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.  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.
- **NOTE** Refer to the Ektron CMS200/300 *Setup Manual, Version 4.7, Revision 1* 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 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 441 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 "Setting Up Load Balance Paths in Ektron CMS200/300" on page 451 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.

# **E-Mail Features**

## **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.

## Automatic eMail Notification

Ektron CMS200/300 has an automated e-mail system that sends out e-mails to the proper users when an action has been, or needs to be performed. Emails are generated when any of the following actions take place.

Email sent to	When a content block is
Next approver	Submitted to be published
Next approver	Submitted to be deleted
Author	Published to Web site
Author	Declined to be published or deleted

In order for users to be notified of these actions, the following criteria must be met:

- Valid System Email Address
- Enabled email notification
- User Email Address
- User E-mail notification enabled

These values are set in the Edit User screen. See Also: "Managing Users" on page 124

The Tasks feature also has automatic email Notification. For more information, see "Email Notification" on page 313.

### **Content of Automatic email**

The automatic emails are stored in and received from the database. Each email consists of one string for the subject and one for the body. Ektron CMS200/300 does not currently support HTML emails, however the messages are fully customizable. To learn about customizing them, see "Customizing Ektron CMS200/300 Emails" in the **Ektron CMS200/300** Setup Manual.

### Instant eMail

In addition to automatic email, **Ektron CMS200/300** lets you send email instantly to a user or user group from many screens. Your ability to send instant mail is indicated by either

- a small mail icon next to a user or group name, as indicated in red below
- a small mail icon on the toolbar (see second image below)

Content Awaiti	ng Approval			
View All Approvals				
<u>View All Approvals</u> Title	Request Ty	pe Start Date	Submitted by	I

View User Groups	
User Group Name	N
🕵 Administrators	1
🔊 oli oli - alti	1

When you click such a user/group name or email icon, and email screen appears, as shown below. Once you complete the screen, an email is sent to designated users.

S <u>Co</u>		
To: John.Edit@Ektron.com		
ew All From: Administrator@Ektron.com		
Subject: Content: Trinity In-Line Pipe		
inity Ir 🛛 Times New Roman 🔹 3 (12 pt) 💿 🖌 🗛 🖓 🖪 🖌 🖳	Α	
米 🖻 🛍 ら つ 🍄 號 🍓		
	6	~
John Edit:		
URL: http://localhost/CMS300Sample/index.asp?id=	22	-
<u>a</u> <u>Co</u>		-

The following sections explain how to set up and use Instant email.

### **Conditions for Instant eMail**

- The user who is using Ektron CMS200/300 must have a valid "from" email address set up in the user profile. If not, email icons do not appear in Ektron CMS200/300.
- The email software must be configured for your server. See "Configuring SMTP Server" on page 459

### Where Instant email is Available

.

Instant email is available from several screens that display users and user groups. Typically, you click a user name or the email icon to launch an email. Screens in the following **Ektron CMS200/300** features support instant email.

- Smart Desktop
- Tasks
- Approvals
- Reports
- User-setup

Wherever instant email is available, one of the email icons appears.

### **Modifying Instant eMail**

When the email screen appears, the following information is copied from **Ektron CMS200/300** into the email.

Field	Source of Default Information	Editable?
То	User you selected to receive the email. If the user does not have valid email address, an error message appears on the screen (see below). If you then insert a valid email address, the email is sent. Error: Must specify both Sender and Recipient(s)!	Yes. If desired, you can add recipients by typing them into this field.
	то:	
	From: Administrator@Ektron.com	
	Subject:	
	If you specify a group to receive the message, as long as one group member has a valid email address, the email is sent to all group members with valid addresses.	
From	User who signed on to Ektron CMS200/300.	No

Field	Source of	Source of Default Information Ed			
Subject	appears. The screen s content block message.	section below pro	d to content block, its ovides an example of <b>e Pipe</b> ) that is linked to	а	Yes
Title	·····	Request T	/pe Start Date	Sub	mitted by
<u>Trinity In-L</u>	ine Pipe	and the second			
Body of messageIf the email message is linked to content block, a link to the content block appears. Also, theYes				Yes	

# Search

Νοτε	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."
Νοτε	This section describes the search on your Web site. To learn about searching through the folders of your content management system, see "Search Content Folder" on page 53.
	Ektron CMS200/300 has a search function which can be easily integrated into any Ektron CMS200/300 Web site template. The search command looks through all of your Web site content, then displays links to the content blocks found by the search.
IMPORTANT!	Each content block includes a <b>Content Searchable</b> field. The content block is only considered during a search if the accompanying check box is checked.
	When you insert the search function onto a template, it looks like this on the Web site.
	Search • All the words
	C Any of the words

C Exact Phrase

🗖 Match	Partial	Words
---------	---------	-------

When performing a search, the user enters word into the text box, selects the necessary search preferences, then clicks the Search button.

### **Search Options**

Before you select one of the search preferences, you must 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.

# **URL** Aliasing

## Activating the Aliasing Feature

The aliasing functionality can be enabled or disabled so that an administrator can choose whether to implement it.

A disadvantage of aliasing is the installation of the ISAPI filter, which examines and modifies the URL. URL filtering degrades the performance of the server and endangers IIS, since it works within the same process as IIS.

## Aliasing a Page Name

To allow aliasing of a page name, use the **Alias User Entry** field appears. The user can enter a name that can used to reference a page. The alias page name is converted to the content template and the content ID.

Typically, an alias page name is created because it is memorable and easy to type in. Here is an example of aliasing for a template and a specific content block.

/cms300sample/mycalendars.asp?id=2&calendared=1&eky=2003&ekm=9

The above is aliased as:

/MyBirthday.htm

## Automatic ID Aliasing

Automatic ID aliasing solves the problem that some search engines do not work with URL parameters. It merges the parameters to create a page name that search engines recognize. The page name includes the template and all of the page's ID values.

### Name Changes

URL Delimiter	The delimiter used to denote the start of each parameter is "_ekt".
Parameter After Delimiter	The URL parameter name directly follows the URL delimiter. An example is "_ektid22".
Any Parameter Count	Any number of URL parameters will be converted into the alias names.

### **ISAPI** Extension

F	Filter	An ISAPI filter will examine URL's and translate the
		names. This will examine the URL path and parse it into the template name with the series of URL parameters.

### **Example Conversion**

Here is the aliasing for a template and a specific piece of content.

/cms300sasmple/mycalendars.asp?id=2&calendared=1&eky=2003&ekm=9

#### The above is aliased as:

/cms300sasmple/mycalendars\_ektid2\_ektcalendarid1\_ekteky2003\_ekm9.asp

# 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	<ul><li>user logon name</li><li>domain</li><li>password</li></ul>	On the Active Directory Setup screen, check <b>Enable Active Directory authentication</b> .	"User Authentication Only Mode" on page 506
active directory integration	<ul> <li>user logon name</li> <li>domain</li> <li>password</li> <li>user's first and last name</li> <li>email address</li> <li>user groups</li> <li>user's group memberships</li> </ul>	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 472

#### WARNING!

To successfully operate Ektron CMS200/300 with Active Directory, the anonymous access user must be running as a domain user account. It cannot be run under a local user account. That domain account can be permission-limited if security is a concern. If anonymous access user 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.

**WARNING!** Ektron strongly recommends configuring a secure socket layer (SSL), especially if you are using Active Directory Integration. SSL encrypts passwords that are otherwise sent as clear text to the Ektron CMS400 server. See "SSL Support" in the **Ektron CMS200/300** Setup Manual for more information.

# **Active Directory Integration**

This chapter covers the following topics:

- "How Information is Transferred from AD to Ektron CMS200/ 300" on page 472
- "Which Information is Transferred from AD to Ektron CMS200/ 300" on page 473
- "Logging into a System that Uses AD Integration" on page 475
- "Associating User Information in AD with Ektron CMS200/300" on page 476
- "User Groups" on page 480
- "The Screens of the Active Directory Feature" on page 486
- "Setup Guidelines" on page 502
- "Disabling AD Integration" on page 503

# How Information is Transferred from AD 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 AD 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.

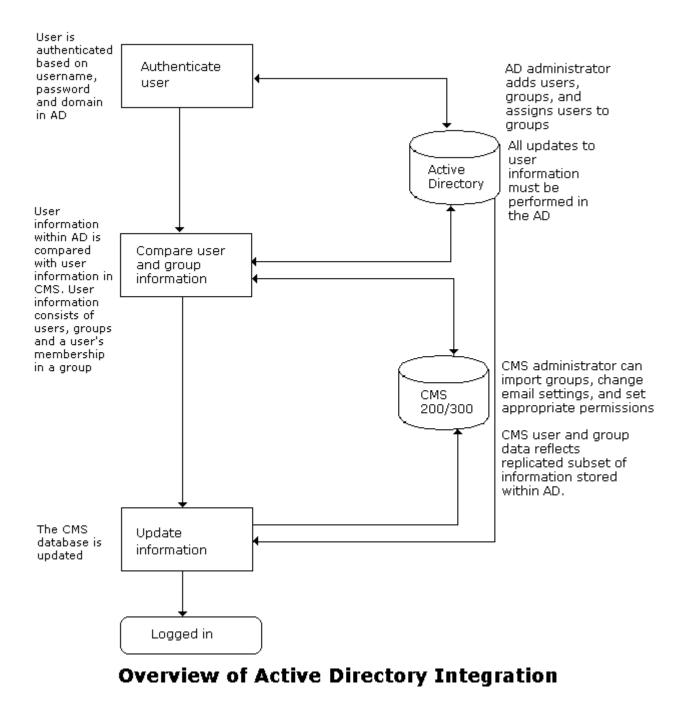
User information, listed in the following table

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.



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.

🚰 Ektron CMS Login - Microsoft I 💻 🗖 🗙				
Enter your username password.	and			
User:				
Pwd:				
LOGIN				

#### **NOTE** Your organization determines AD domain names.

For more information about logging in, see "Logging Into an Ektron CMS200/300 Web Site" on page 10.

# 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 the Add Users button (
- 3. The Search Active Directory for Users screen appears.

Ektron		v	/orkarea	
Content Managemen 📥	Search Active	Directory for Use	ers	
192.168.0.156/CN	←			
🗄 🗀 <u>Content</u>				
🗉 🛄 Library	Username	Firstname	Lastname	Domain
• 🗀 Approvals				planets.com 💌
🗉 📃 Reports	Search			
🗄 🗀 Fonts 🚬 🖃				
🧉 Done				💙 Internet 🏼 🖉

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 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 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 486

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 478.

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 492

### 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 499

**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 (<sup>™</sup>) on the user's View User Information screen.

### See Also: "The View User Information Screen" on page 497

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 492

### 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 127

**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 35.

### **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.
- Click the Associate CMS User with Different AD User button
   (S).
- 4. Select a user to replace the user you selected in Step 2.
- 5. Click the **Save** button ( $\square$ ) 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 the **User Groups** folder.
- 2. Click the Add Groups button ( 12. ).

The Search Active Directory for Groups screen appears.

Ektron	Workarea
Content Managemen 📥	Search Active Directory for groups
🔄 192.168.0.156/CM	←
🗄 🛄 <u>Content</u>	
🗉 🗀 Library	Active Directory Group Domain
<u>Approvals</u>	All Domains 💌
🗉 📃 Reports	Search
E Eonts	
🗄 🧰 <u>Users</u>	
🖹 🔁 User Groups	
Heln V	
🧉 Done	📄 📝 🕺 Internet

- 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 the Search button.

A new screen displays all groups that satisfy the search criteria.

- Click the check box under the Add column to add users to Ektron CMS200/300.
- 7. Click 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 493 and "Associating Groups with Active Directory Groups" on page 495

To learn how membership is updated from then on, see "After Integration is Enabled" on page 482.

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 480 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 (<sup>13)</sup>) 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.

300 Administrator gro	300 Administrator group.						
Content Management	Active Directory Setup						
🔁 192.168.0.156/CMS:	2						
🗄 📃 <u>Content</u>							
±⊡ <u>Library</u>	Active Directory Authentication is Enabled and Reg						
<u>Approvals</u>	More Configuration.						
Teports	Active Directory	Installed:					
Tents	Active Directory Authentication: Enabled						
a <u>Users</u>							
🕂 📃 <u>User Groups</u>	Active Directory Integration:						
🖹 🔁 Help	Enabled						
🗉 🗀 <u>Manuals</u>	Auto Add User:						
🖹 🔄 Configuration 👘							
🛛 🖻 🔁 Active Director							
🧕 <u>Setup</u>	Enabled						
Status	User Property Association						
🥑 <u>Setup</u>	CMS Property	Active Directory Property					
💽 <u>Metadata Defin</u>	EmailAddr1	mail					
🛛 🔄 Xml Configurati	FirstName	givenName					
	LastName	sn					
	CMS Administrator Group Association AD Group Name @ AD Domain Administrators @ planets.com						
	Domain						

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 486

# 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 495

### **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 478).

### **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 480.

### 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 (<sup>SP</sup>).

- 4. Select a group to replace the group you selected in Step 2.
- 5. Click the Save button ( $\blacksquare$ ) 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 489

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 506	

Field	Description	For more information, see
Active Directory Integration	If enabled, the Active Directory feature is functional.	"Active Directory Integration" on page 472
	Can only be enabled if Active Directory Authentication is enabled.	
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.	"Associating User Information in AD with Ektron CMS200/ 300" on page 476
	Can only be enabled if Active Directory Integration is enabled.	
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.	"User Groups" on page 480
	Can only be enabled if Active Directory Integration is enabled.	
User Property M	apping	
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)

Field	Description	For more information, see			
Ektron CMS200/3	Ektron CMS200/300 Administrator Group Mapping				
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 483			
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

Ektron	Workarea
Content Management	Active Directory Setup
🔁 192.168.0.156/CMS:	
🗄 🗀 Content	
🖻 🗀 Library 🔰 🌔	Active Directory Authentication is Enabled and Requires
🗄 🗀 <u>Approvals</u>	More Configuration.
🗉 📃 Reports	Active Directory Installed:
🗄 🦲 <u>Fonts</u>	-
🖹 🔂 Users	Active Directory Authentication: Enabled
🗄 🛄 User Groups	Active Directory Integration:
🖹 🔁 Help	Enabled
🗄 🧰 Manuals	Auto Add User:
11 -	Enabled

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.

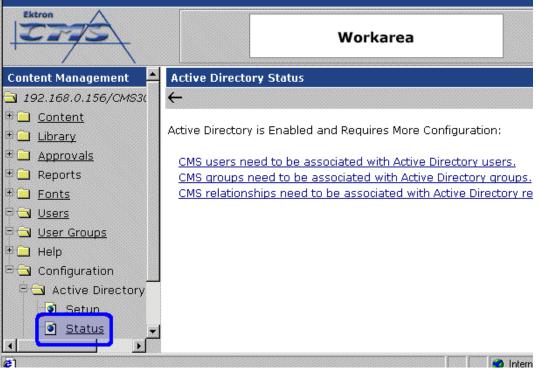
See Also: "The Active Directory Status Screen" on page 490

### 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 476.
- 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 482
- an Ektron CMS200/300 group is not associated with an AD group, read "User Groups" on page 480

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.

Ektron		Work	karea	
Content Management 🛛 🔺	Associate CMS	Users with Active Dir	ectory Users	
🔁 192.168.0.156/CMS3(	₩ 🕄 🔶			
🗄 🗀 <u>Content</u>				
🗄 🗀 Library	CMS Username	AD Username	@ AD Domain	Search D
🗄 🚞 Approvals	bbolt	bbolt	Multiples Found	Search
🗉 🗀 Reports		bbon		
🖻 🗀 <u>Fonts</u>				
🖻 🔄 <u>Users</u> 👘	jedit		0	Search
🖻 🔁 <u>User Groups</u>				
🗄 🛄 Help	DanO'Neil		@	Search
🖹 🔁 Configuration 🚽 🚽		•		
🙋 Done				🧿 Internet

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 ( $\mathbb{E}$ ) 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.

Ektron		Workarea	
Content Management	Associate CMS Relation	ships with Active Directory Relation	onships
🔁 192.168.0.156/C№	₩ 🕄 ←		
🗉 🧰 <u>Content</u>			
🗄 🗀 Library	Username	User Group Name	Delete
🗉 🧰 <u>Approvals</u>	Kristin@planets.com	editors	
🗉 🧰 Reports			
🗉 🧰 <u>Fonts</u>			
🖻 🔄 <u>Users</u>			
🖻 🔄 <u>User Groups</u>			
🗉 🗀 Help			
🖻 🔄 Configuration			
🖹 🖻 🔄 Active Direct			
Setup Status			
<b>e</b> ]			🤣 Internet

See Also: "Associating a User's AD Group Information with Ektron CMS200/300" on page 482

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 ( $\mathbb{S}$ ) 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 (<sup>L</sup>).

### 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.

Ektron		Worl	karea	
Content Management	Associate CMS G	roups with Active Dir	ectory Groups	
🔁 192.168.0.156/CM	₩ 🕄 ←			
🖻 🦲 Content				
🖻 🦲 Library	CMS Group Name	AD Group Name	@ AD Domain	Search D
🗄 🦲 Approvals	Editors	Editors	@ planets.com	<u>Search</u>
🗉 🦲 Reports				
🗉 🦲 <u>Fonts</u>				
🗉 🗀 Users				
🗉 🦲 User Groups				
🗄 🧰 Help				
🖹 🔁 Configuration 🍦				
Ø Done				Internet

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.

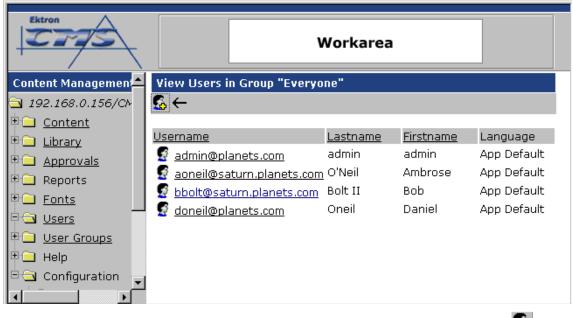
If there is no default and you know the AD group name to associate with an Ektron CMS200/300 group, enter that in the **AD Group Name** and **AD Domain** fields. If you do not know the AD groupname, click <u>Search</u> to find the group in the AD.

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 (**L**) to save them.

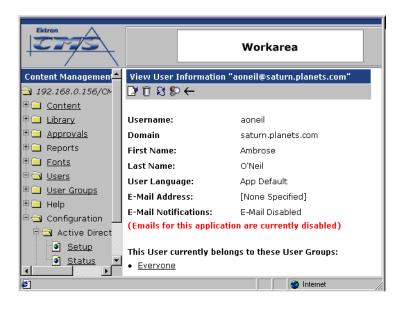
### **The View Users Screen**

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 (<sup>1</sup>/<sub>1</sub>) 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
Û	Delete user See Also: "Deleting Users" on page 479
22	Retrieve latest information from AD into Ektron CMS200/300 See Also: "After Integration is Enabled" on page 478 This toolbar button does not appear if you are using user authentication mode.
\$>	Replace user See Also: "Replacing a User" on page 479
←	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 (1260).

Ektron		v	/orkarea	
Content Managemen 📥	Search Active	Directory for Use	ers	
🔁 192.168.0.156/C№	←			
🕂 🗖 <u>Content</u>				
🗄 🛄 Library	Username	Firstname	Lastname	Domain
🗄 🚍 Approvals				planets.com 💌
🕀 🛄 Reports	Search			
🕂 🗀 <u>Fonts</u>				
I I Done				Nternet

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 ( $\blacksquare$ ) 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 480).

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

Ektron		Workarea		
Content Managemen 📤	View Users in Group "CMSAd	min@planets.	.com"	
🔁 192.168.0.156/CM	\$2 ←			
E Content				
🗄 🛄 Library	<u>Username</u>	<u>Lastname</u>	<u>Firstname</u>	Language
E Approvals	🔮 admin@planets.com	admin	admin	App Default
Reports	🔮 aoneil@saturn.planets.com	O'Neil	Ambrose	App Default
Fonts	🔮 <u>bbolt@planets.com</u>	Bolt	Bob	App Default
🖉 Done			🔹 🚺 🔮 Int	ernet //

The screen also displays the following buttons.

Button	Description
<b>\$</b>	Replace group See Also: "Replacing a User Group" on page 485
←	Return to previous screen

The Search Active Directory for Groups Screen

Ektron		Workarea
Content Managemen 📥	Search Active Directory for	groups
🔁 192.168.0.156/Cŀ	÷	
🖲 <u>Content</u>		
🗄 🗀 Library	Active Directory Group	Domain
Approvals		planets.com 💌
🖲 Reports 🔄	Search	
Eonts		
🖻 🔄 Users 🔤		
🖉 Done		🔮 Internet 🥢

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.

**NOTE** You can only select AD groups 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 groups within that domain.

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

(**L**) 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.
- 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.

		John Smith Properties ? 🗴
Ektron		Published Certificates Member Of Dial-in Object Security Environment Sessions Remote control Terminal Services Profile General Address Account Profile Telephones Organization
Content Mana	Add a New User to the System	User logon name:
∃ 192.168.0	₩ ←	ismith @planets.com
E 🗀 Content		User logon name (pre- <u>W</u> indows 2000):
🖲 🗋 Library	Username: jsmith	PLANETS\ jsmith
🖲 🗋 <u>Approva</u>	First Name: John	Logon Hours Log On To
📃 Reports	Last Name: Smith	
🖲 🔁 <u>Fonts</u>		Ageount is locked out
🖻 🖻 <u>Users</u>	Password: ****	Account options:
🖹 🔄 <u>User Gr</u>	Confirm	User must change password at next logon
🖲 🗀 Help	Pwd:	User cannot change password
🖹 🔄 Configui	User	Password never expires
🖹 🔁 Activ	Language:	Store password using reversible encryption
🧕 <u>Se</u>	E-Mail	Account expires
<u> Sta</u>	Address:	• Never
💿 <u>Setu</u> r	Disable E-Mail Notifications	O End of: Thursday , February 06, 2003
Meta	(Emails for this application are cur	
	disabled)	OK Cancel Apply
🙋 Done	🔹 🕹 Internet	

- 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.)

- 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**.

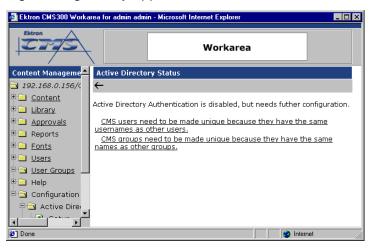
See Also: "The Active Directory Setup Screen" on page 486

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).

Ektron		Work	area	
Content Manageme	Make CMS Users	; Unique		
🔁 192.168.0.156/C	₩ ←			
🖻 🦲 <u>Content</u>				
🗄 🗀 Library 🚽	Username		New Unique Usernam	
E Approvals	bbolt	@ saturn.planets.com	bbolt_@_saturn.plane	ets.com
🗉 🗀 Reports	bbolt	@ venus.planets.com	bbolt_@_venus.plane	ts.com
E Conts				
🕗 Done			📃 📄 🛃 İn	iternet //

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		Wor	karea	
Content Manageme	Make CMS Groups	Unique		-
∃ 192.168.0.156/C	₩ ←			
🖻 🗀 Content 🚽				
🗉 🗀 Library	User Group Name	@ Domain	New Unique User Group	o Name
Approvals	Account Operators	@ planets.com	Account Operators_@_	planets.com
Reports	Account Operators	@ saturn.planets.com	Account Operators_@_	saturn.planets.com
Done				🔰 Internet 👘

Ektron recommends that you accept the suggested new names.

Click the Save ( $\blacksquare$ ) 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 "Logging into a System that Uses AD Integration" on page 475

# Adding User Information from AD to Ektron CMS200/300

"Adding User Information from AD to Ektron CMS200/300" on page 476

## 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 toolbar button (<sup>SP</sup>).

4. Select the AD user and domain.

See Also: "Associating Ektron CMS200/300 Users with Active Directory Users" on page 492

## 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 479

### Replacing a User

See "Replacing a User" on page 479

**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 129.

# 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 486

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 492

The View Users Screen works the same for both modes.

See Also: "The View User Information Screen" on page 497

## **Setup Guidelines**

- 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.

Ektron A		
		John Smith Properties ? 🗙
	N	Published Certificates Member Of Dial-in Object Security
		Environment Sessions Remote control Terminal Services Profile
Content Management	Edit User "jsmith@planets.co	General Address Account Profile Telephones Organization
192.168.0.156/CMS3		User logon name:
🖻 🛄 <u>Content</u>		ismith @planets.com
🗉 🛄 Library	Username: jsmith	User logon name (pre-Windows 2000):
Approvals	Domain planets.com	PLANETS\ ismith
🗉 🛄 Reports	First Name: John	
🗉 🛄 <u>Fonts</u>	Last Name: Smith	Log On Io
🖻 🔄 <u>Users</u>	Last Name: Smith	Account is locked out
🗉 🛄 <u>User Groups</u>	User App Default	Account options:
🗉 🗀 Help	Language:	User must change password at next logon
🗄 🔄 Configuration	E-Mail	User cannot change password
🖹 🖹 🔁 Active Director	Address:	Password never expires
Setup	🗹 Disable E-Mail Notificatio	Store password using reversible encryption
Status	(Emails for this application a	Account expires
Setup	disabled)	⊙ Never
💿 <u>Metadata Defin</u>		O End of: Thursday, February 06, 2003
Xml Configurati		
		OK Cancel Acoly
		OK Cancel Apply
	-	
🧉 Done	💙 Intern	et //

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 "Disabling AD Integration" on page 503

## **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 4.7, Revision 1.* 

## **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:

info@ektron.com

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