Ektron

Redefining Web Content Management

Ektron CMS400.NET Administrator Manual

Version 4.7, Revision 9

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What's New in the 4.7 Release

- **eWebEditPro+XML v4.2 - Ektron CMS400.NET** now includes eWebEditPro+XML V4.2. This adds powerful capabilities to easily create, collect and validate XML data via internal-facing forms, and display it in multiple outputs. V4.2 includes spreadsheet-like math capabilities and other valuable features and benefits. For more information, see "Working with XML Forms" on page 173
- **Workarea** - The Workarea was streamlined to have fewer popups and provide quicker access to required functionality. Also, a tabular interface is used to organize sets of data.
- **Menu UI** - A less intrusive menu system is offered. When logged into a site, the borders and menus do not interfere with the formatting of the page. A floating toolbar only appears when needed. The "Classic" interface from previous versions is still available and can be selected through a setup option. For more information, see "The Floating Toolbar" on page 12
- **Form Design** - All form properties are previewed, edited, and published together. Separate windows are no longer used. For more information, see "Creating a Form's Content Block" on page 240
- **Reporting** - New content expiration report. From the workarea, a user can see which content is about to expire. See "Content Workflow Reports" the **Ektron CMS400.NET** User Manual.
- **Content Archiving** - You can determine what happens to a content block that reaches its end date: whether the content remains on the site or is removed; and if the content appears on the new Refresh Report. For more information, see Scheduling Content to Begin and End in the **Ektron CMS400.NET** User Manual.
- **Email** - Users of the Workarea can quickly and easily send emails to those who are also setup as users in the Workarea. This increases communication among users. For more information, see "Instant eMail" on page 431.

- **User Customization** - Settings are now available for each user of **Ektron CMS400.NET**. The Workarea size, the login landing page, and the starting folder are selectable by the user. An administrator can override these settings. For more information, see "Work Page Size" on page 23.
- **Tasks** - A task's state can change automatically when an "attached" content block's status changes, to track the progress of work on that content. Users can also hold discussions from within the task to communicate information. For more information, see "Managing Tasks" on page 270.
- **International Content** - The ability to provide content under multiple translations is offered. You can also set up a separate approval chain for each language, and language-specific tasks, menus, and collections. For more information, see "Working with Multi-Language Content" on page 311.
- **URL Aliasing** - If search engines have trouble finding your Web pages (which use URL parameters), this feature converts your page names to a format that search engines can easily recognize. Or, you can use the manual aliasing feature to a memorable or catchy name to page on your site. For more information, see "URL Aliasing" on page 414.

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Introduction to Ektron CMS400.NET

Thank you for purchasing Ektron CMS400.NET, the best and most affordable solution for Web content management. We welcome you to use Ektron CMS400.NET 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 CMS400.NET, 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 CMS400.NET

Ektron CMS400.NET is a powerful, easy-to-use, and affordable XML content management solution that empowers anyone to take an active role in managing Web content and optimizing online strategies. It streamlines site management, automates workflow processes, and supports collaboration. **Ektron CMS400.NET** reduces costs, saves time and makes Web sites, extranets, and intranets more effective – while generating rapid ROI.

Business users, like marketing or PR pros, can author, manage and publish Web content, build and deploy Web forms, and collect and leverage visitor info. Our browser-based editor, eWebEditPro+XML, supports the industry's best in-context editing environment – ensuring user adoption and project success.

Ektron CMS400.NET also helps to move paper-based forms processes to the Web. Our editor lets users create Web forms such as expense reports, health records, and insurance forms, deploy them to internal users, collect data, apply validation and math functions, and run forms through workflow – all within a browser.

Who Should Read This Manual?

This document introduces all the concepts, features, and instructions for using Ektron CMS400.NET 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.

Online Learning Center

A lot of information in this manual is also presented in an tutorial, animated format on Ektron's Web site. To access Ektron's CMS400.NET Web Training, go to http://www.ektron.com/cms400-web-cms.aspx?id=922.

Sample Site Used in this Document

This manual uses the sample ASPX Web site installed with Ektron CMS400.NET to explain and demonstrate functionality in a Ektron CMS400.NET controlled Web site.

Types of Users

Ektron CMS400.NET 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 types of Ektron CMS400.NET users are:

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

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

You assign privileges to Ektron CMS400.NET 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 describes features and actions available to a user with administrative privileges. Information about Ektron CMS400.NET's editing and publishing features may be found in the Ektron CMS400.NET User Manual.

Key Concepts

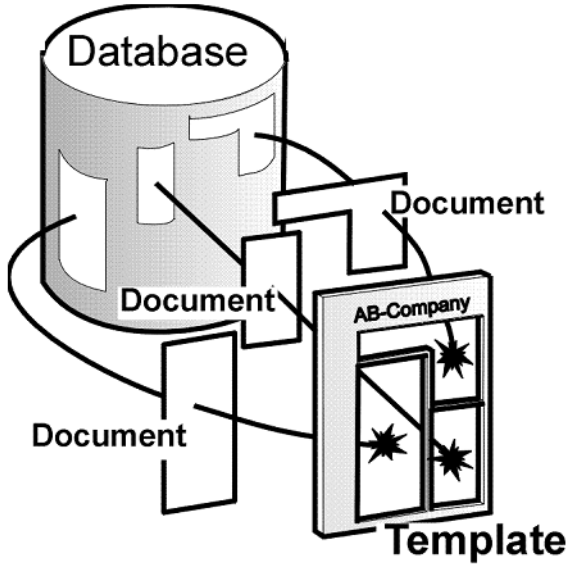
The Ektron CMS400.NET product implements specialized concepts and processes that make the product as effective as possible. Understanding these concepts before you use the product will help leverage your Web site development efforts. You will encounter the concepts and terminology discussed in this chapter as you use Ektron CMS400.NET.

Management of Content Blocks

The Ektron CMS400.NET 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 can build with external tools. Ektron extends VisualStudio to support the template design process.

Templates can be thought of as mechanical layouts of your web pages. They incorporate powerful custom functions that Ektron CMS400.NET uses to manage your content blocks. Each content

block is assigned a unique ID. Ektron CMS400.NET uses the ID to retrieve a content block from 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 CMS400.NET, and create a new content block that uses the new template. You can even modify the layout of an existing template, reincorporate it, and the content blocks automatically flow into and adjust to the new layout.

Workflows

This section offers workflow processes to be used when starting an Ektron CMS400.NET 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.

Initial Deployment Process

The flow described below assumes that you have set up your server machine, platform, and firewall, selected your ISP, loaded all scripting software, and installed Ektron CMS400.NET.

The following outlines a process for setting up a Web site that uses Ektron CMS400.NET. For a more thorough explanation of this process, see the **Ektron CMS400.NET** Setup Manual.

1. Design the site: identify Content Folders, content of pages, flow of information, link structure.
2. Lay out and design your template with tables, graphics, hyperlinks, etc. using Visual Studio.NET.
3. Identify placement of content blocks in the templates and add ID tags to each document in the template.
4. Create a style sheet or 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 insert some content that explains what should be filled in.
6. Upload all graphics that the site will need initially using the Library Manager.
7. Set up login permission to allow at least one administrator to access the site.

   Log in to Ektron CMS400.NET.
8. Access the Workarea.
9. Select **Settings > Configuration > Setup** and make any necessary changes.
10. In the **Content** folder, identify and load in templates.
11. From the **Settings** folder, set up User Groups and Users.
12. In the **Content** folder, assign permissions to Content Folders and establish the approval process.
13. Notify responsible personnel that the site is ready.

Site Maintainer Workflow

Site Maintainers are responsible for keeping the site accurate and up to date. These people primarily work within the Workarea and the editor.

For a more thorough explanation of these actions, see the **Ektron CMS400.NET** User Manual.

1. Log into Ektron CMS400.NET and check Workarea for content blocks that need attention (for example, submitted content).

2. Go to the Web page that contains the content block you want to change.
3. Click the Edit button.
4. Make changes.
5. Save changes using the appropriate button. For example, to continue working with a content block, use the Save Button.
6. Preview the changes using the Preview option.
7. Go back and make additional changes if necessary.
8. Check in the content block or submit it for publication.

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.
NOTE:	Notes indicate special conditions or issues that the reader should be aware of.
WARNING!	A Warning indicates very important information that should be followed. Inattention to a warning can produce undesirable results.
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 CMS400.NET, what's next? This chapter explains several resources supplied by Ektron to help get your Ektron CMS400.NET Web site up and running.

Logging Into an Ektron CMS400.NET Web Site

See "Logging In and Out" in the **Ektron CMS400.NET** User Manual.

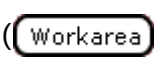
Editing Content Within Ektron CMS400.NET

Ektron is the recognized leader of in-context editing. This means that the Web site is the primary user interface for a business user.

From the Web site, the user can navigate to any page and, as long as he has permission, perform all system activities, such as edit content, add content, report on forms, view calendars, etc.

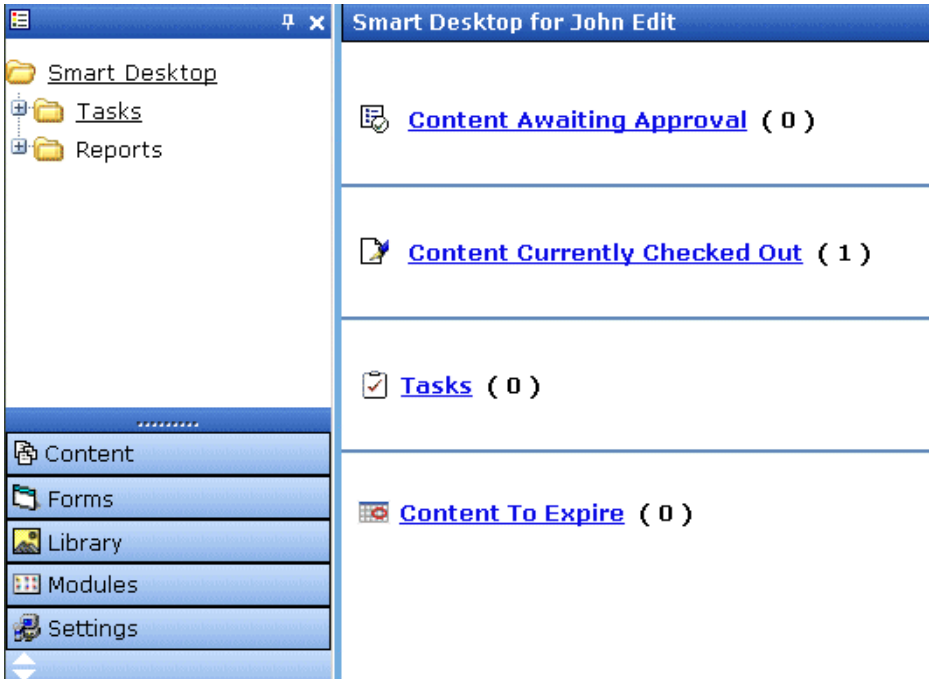
Accessing the Workarea

Once logged into Ektron CMS400.NET as an administrator, you can edit content by navigating to the page (like a business user) or access the Administrator Workarea. From there, you can perform all system activities, such as configuring and viewing every setting of Ektron CMS400.NET. To access the Administrator Workarea, follow these steps.

1. Log in to your Web site, as described in "Logging Into an Ektron CMS400.NET Web Site" on page 7.
2. Click the Workarea button (

) on a login page or a **Workarea** toolbar button ( ).

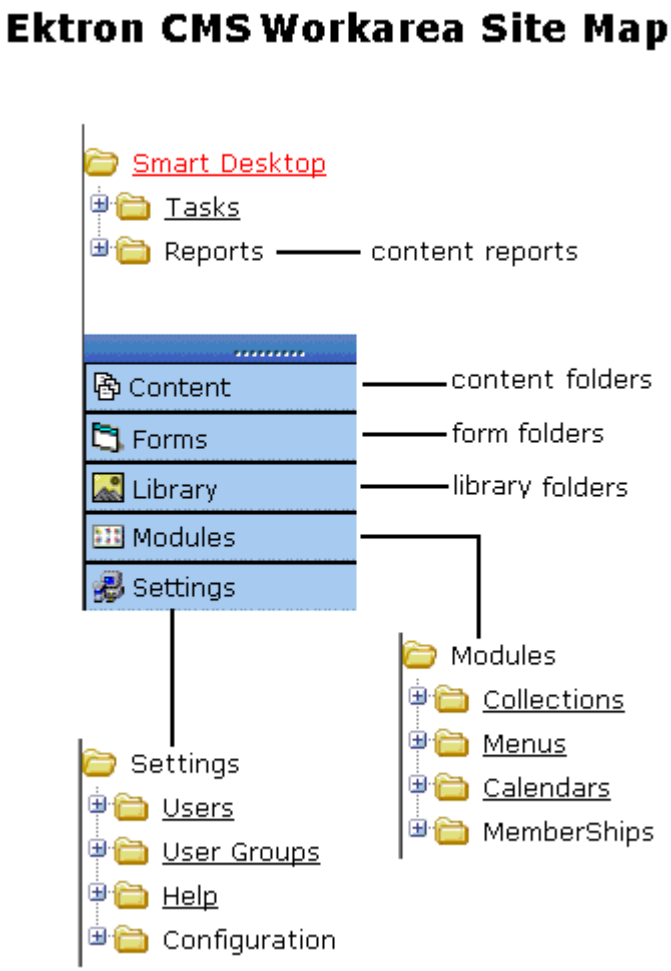
The Administrator Workarea has a Windows Explorer-like interface.



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

NOTE In the Application Setup screen, you can determine which screen appears when you access the Workarea. *See Also:* "Set smart desktop as the start location in the Workarea" on page 24

The following graphic illustrates the location of **Ektron CMS400.NET**'s major components in relation to the Smart Desktop display.



Closing the Administrator Workarea

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

When you close the Administrator Workarea, you return to the Ektron CMS400.NET view of your Web site, but do not exit Ektron CMS400.NET.

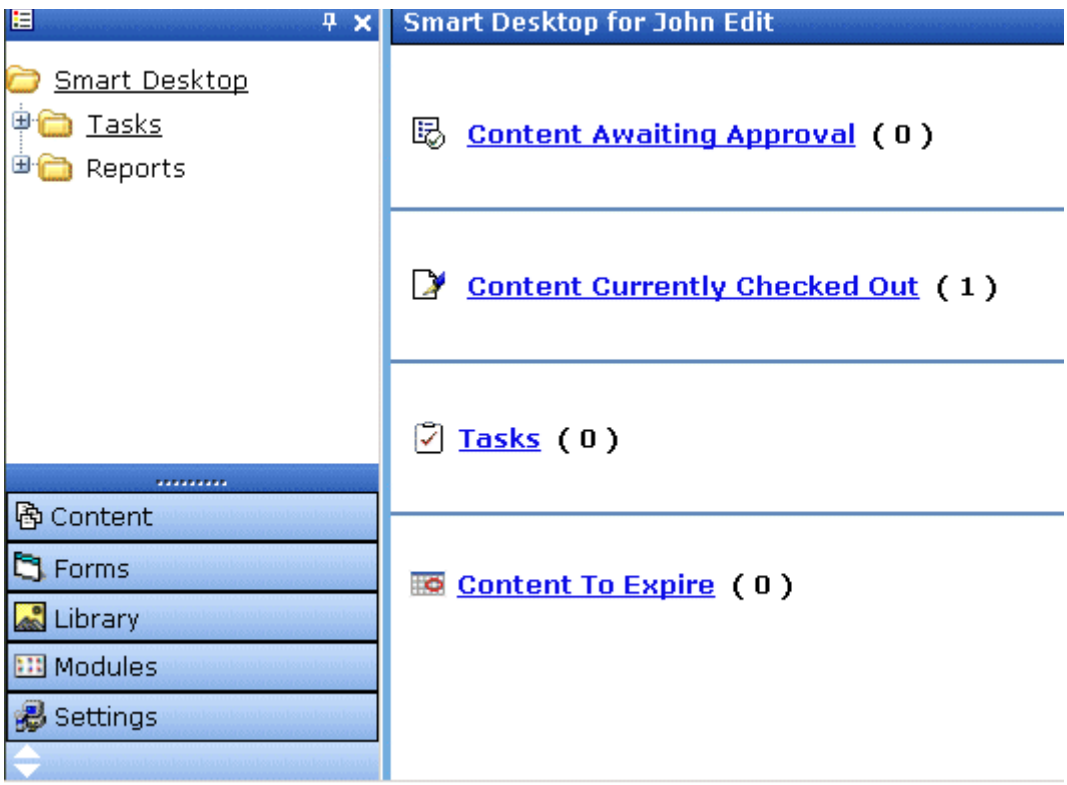
Workarea Navigation

The **Ektron CMS400.NET** administrator Workarea is divided into two frames:

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

NOTE 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. By going to the report (**Smart Desktop > Reports > Content To Expire**) and changing the number of days, you can view a list of content to expire in that amount of time.

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.

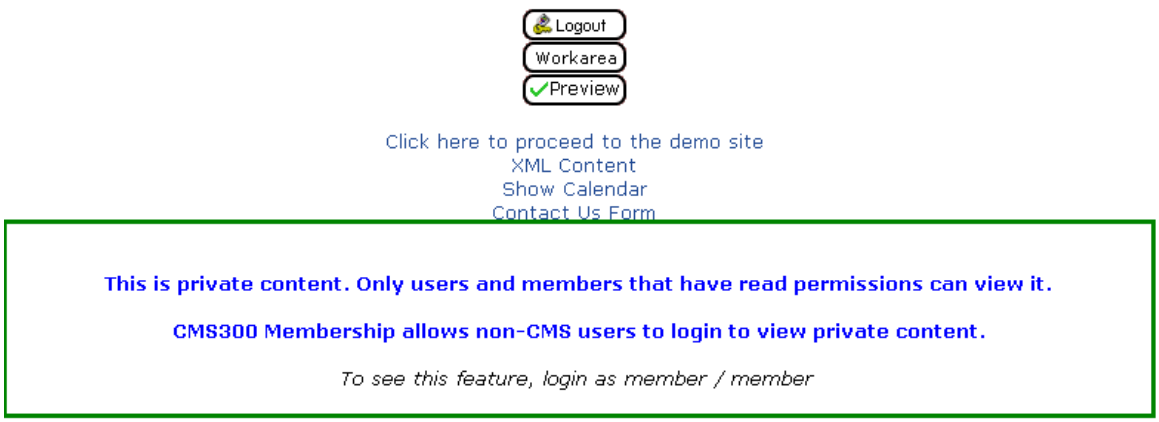


To learn more about the Workarea, see the section of the **Ektron CMS400.NET** User Manual titled “Understanding the Smart Desktop.”

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. *See Also:* ”Returning to the Classic CMS Interface” on page 13

NOTE The colored borders only appear when you are not in site preview mode. To learn about Site Preview mode, see “Logging In and Out” > “Site Preview” in the Ektron CMS400.NET User Manual.



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

Meaning of Border Color

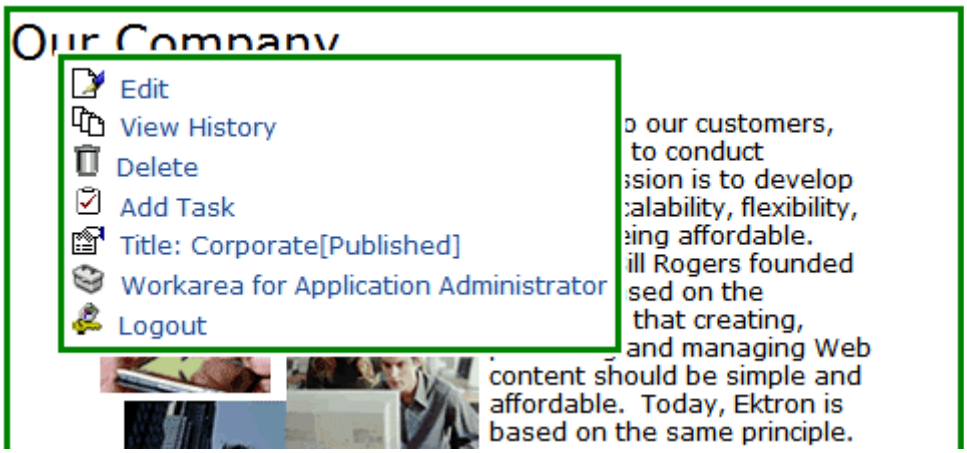
The table below describes the meaning of each border color.

Color	Meaning	Description
Green	Active	Content is active and ready to be edited
Red	Checked Out	Another user is editing the content

Color	Meaning	Description
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 Floating Toolbar

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

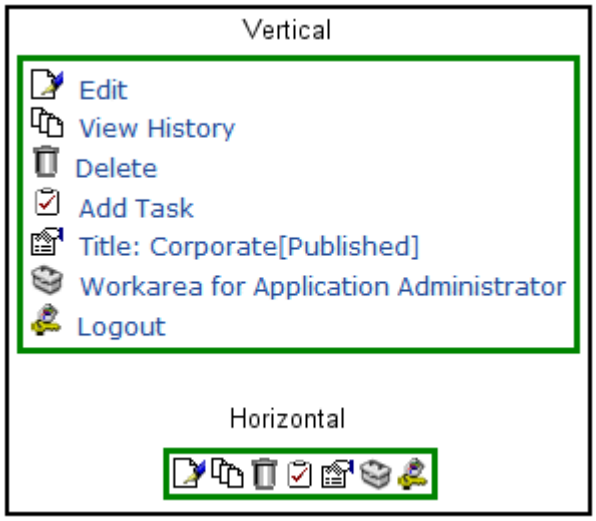


Toolbar buttons let you act on the displayed content and display important information about it. For example, one toolbar button lets you edit the content block, while another displays previous versions of it. The toolbar buttons change depending on the content block's status or your permissions for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

Each button is described in "Floating Toolbar Buttons" on page 14.

Floating Toolbar Display Type

You can change the floating toolbar display type. The choices are vertical and horizontal. Vertical is the default. Below are examples of each.



To change the display type follow these steps.

1. Open web.config in your root folder.
2. Find the variable `ek_MenuDisplayType`.
3. Change its value.

   0 (zero) = Horizontal

   1 = Vertical

Returning to the Classic CMS Interface

Prior to Release 4.7, the colored borders and the toolbar menu always appeared on the screen, not only when the user moved the mouse over the area. To return to this display style, follow these steps.

NOTE If you switch to the classic interface, the page layout is not depicted accurately because of the fixed toolbars.

1. Open web.config in your root folder.
2. Find the variable `ek_UserMenuType`.
3. Change its value to 1.

After you make this change, the colored borders and toolbar menus appear on the screen as soon as it appears, and remain there.

Floating Toolbar Buttons

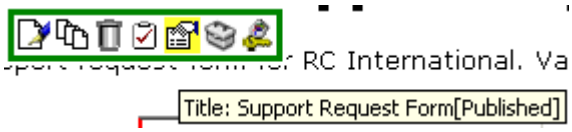
The following table describes the buttons you might see on the floating toolbar. The buttons you see can vary depending on the status of the content block, your permissions, etc.

Toolbar Button	Name	Description	More Information
	Add	Appears if you selected a language and the content block is not available in that language. Use this button to copy the existing content into a new content block and translate it to the new language.	"Translating a Content Block" on page 318
	Approve	Approve or decline the request for the content block to be published or deleted.	"Approve ()" on page 18
	Assign Task	Assign a task related to this content block.	"Managing Tasks" on page 270
	Delete	Opens content block's View Content screen. From here, you can view important information about the content block and perform all actions on it.	
	Edit	Checks out content block to be edited by you.	"Edit ()" on page 16
	Logout	Log out of the Ektron CMS400.NET view of the Web site.	"Logout ()" on page 20
	Preview	Preview the content block before it is published.	"Preview ()" on page 19
	Properties	Opens content block's View Content screen. From here, you can view important information about the content block and perform all actions on it.	"Content Block Status" on page 15; "Managing Content" on page 48
	View Content Difference	Displays differences between a historical version and the published version of a content block.	"View Content Difference ()" on page 17

Toolbar Button	Name	Description	More Information
	View History	Displays historical versions of the content block. You can also restore older version if needed.	"View History ()" on page 18
	Workarea	Opens the workarea. From here, you can perform all Ektron CMS400.NET actions.	"Workarea ()" on page 19

Content Block Status

After seeing a content block's border, you can get a more detailed status by hovering your cursor over the properties 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
A	green	**Approved**	Through workflow and published on the Web site
O	red	**Checked Out**	Currently being edited. Has not been checked in.
I	green	**Checked In**	Checked in for others to edit
S	yellow	**Submitted for Approval**	Saved and submitted into approval chain *See Also:* "Setting Approval Chains" on page 93
M	yellow	**Marked For Deletion**	Requested for deletion

Letter	Border Color	Meaning	Content state
T		**Awaiting Completion of Associated Tasks**	Task(s) assigned to content are not complete
P	grey	**Pending Go Live Date**	Approved but “Go Live” date hasn’t occurred yet
D		**Pending Deletion**	Content block was created with a future start date then checked in and deleted. This status only remains until the start date is reached. At that point, the content block is deleted.

For more information about

- content block statuses, see Appendix A of the **Ektron CMS400.NET** User Manual
- content block activities, see ”Managing Content” on page 48

Edit ( )

Content in an Ektron CMS400.NET Web site can be in any of several states.

- **Green border** - you can check out the content for editing
- **Yellow border** - you can edit the content if you submitted it for publishing; otherwise, you cannot
- **Red border** - you cannot edit the content

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 CMS400.NET, as described in ”Logging Into an Ektron CMS400.NET Web Site” on page 7.
2. Browse to a content block with a green border you want to edit.
3. Right click the mouse to display the floating toolbar.

4. Click the Edit button ( ).
5. The Edit Content screen is displayed.
6. From that screen, you can
   - Edit content
   - Save changes
   - Check-in content
   - Enter or edit a summary
   - Enter or edit metadata
   - Submit the content for approval
   - Publish a content block to the Web site
   - Access the Ektron CMS400.NET Library

For more information, see "Editing Content" on page 58.

View Content Difference ( )

The compare toolbar button appears when the content block is in any state other than published.

Using Ektron CMS400.NET's content comparison utility, eWebDiff, you can 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 CMS400.NET, as described in "Logging Into an Ektron CMS400.NET Web Site" on page 7.
2. Browse through your Web site until you find a content block that has a staged version to be compared with.
3. If the floating toolbar does not appear, right click the mouse to display it.
4. Click the View Differences button ( ). eWebDiff opens in a new window.

NOTE See "Comparing Current and Previous Content Blocks" on page 68 for additional information about the CMS Compare utility.

Approve ( )

When logged in as a user who is part of an approval chain, you may see a content block with a yellow border. The yellow border indicates that the content is in the approval chain. If you are the next approver of the content block, an Approve button ( ) appears in the toolbar.

To approve a submitted content block, follow these steps.

1. Browse to a content block that is submitted and awaiting your approval.
2. If the floating toolbar does not appear, right click the mouse to display it.
3. Click the Approve button ( ).
4. The Approve Content screen is displayed.
5. Perform one of the following actions:

   - **Approve** ( ) 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 ( ) at the top corner of the window to close without doing anything

View History ( )

Each time a content block is checked in or published, a snapshot is made of it and stored in the Ektron CMS400.NET 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 CMS400.NET, as described in "Logging Into an Ektron CMS400.NET Web Site" on page 7.
2. Find the content block whose history you want to view.

3. Right click the mouse to display the floating toolbar.
4. Click the View History button ( ).
5. The Content History window appears.

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

Preview ( )

If a content block's state is other than Published or checked out, this button displays the entire template as though everything that is currently staged has been published. So, you can see what your changes will look like on the Web site *before* publishing. If necessary, you can fix any problems and perfect the page before submitting it into the approval chain.

To preview a staged content block, follow these steps.

1. Log in to Ektron CMS400.NET, as described in "Logging Into an Ektron CMS400.NET Web Site" on page 7.
2. Browse through your Ektron CMS400.NET 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. Right click the mouse to display the floating toolbar.
4. 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 CMS400.NET 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 CMS400.NET, as described in "Logging Into an Ektron CMS400.NET Web Site" on page 7.

2. Navigate to any page that has an Ektron CMS400.NET content block displayed on it.
3. Right click the mouse to display the floating toolbar.
4. Click the Workarea button ( ).
5. The Workarea opens in a new window.

Logout ( )

This button lets you log out of Ektron CMS400.NET.

Site Preview

To learn about Site Preview mode, see “Logging In and Out” > “Site Preview” in the **Ektron CMS400.NET** User manual.

Modifying the Application Setup Screen

In the setup section of the configuration folder, you can enter or edit information for the Ektron CMS400.NET 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

You must complete this before any user can access your Ektron CMS400.NET Web site.

Viewing Application Setup Information

To view Ektron CMS400.NET setup information, follow these steps.

1. Access the Administrator Workarea. *See Also:* ”Accessing the Workarea” on page 7
2. Click the **Settings** folder button 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.

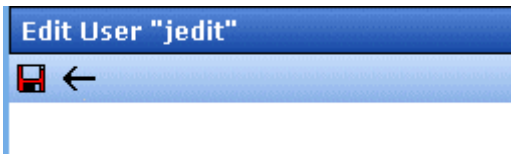
Updating Setup Information

To update setup information, follow these steps.

1. Access the Application Setup screen, as described in "Viewing Application Setup Information" on page 21.
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 25 for more information.
Default Application Language	Select a default language for Ektron CMS400.NET. **How a User's Application Language Affects His Use of Ektron CMS400.NET** This user's language determines the screens and messages that appear within **Ektron CMS400.NET**. **How the System Default Language Relates to a User's Language Setting** In the user profile, you can set each user's 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. Note: Do not confuse this default application language with the ek_DefaultContentLanguage variable in web.config. For more information on that variable, see "The Default Language" on page 317.
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.

Field	Description
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 CMS400.NET library folder tree. *See Also:* "Enabling CMS to Create File System Folders" on page 25
Built - in User Information	Edit the username and/or password for the built in user. By default, the username and password combination is **builtin/builtin**. *See Also:* "BuiltIn User" on page 26
Editor Options	Toggle between displaying and not displaying font related buttons in the editor. Also choose to remove styles and preserve MS Word styles and classes. *See Also:* "Editor Options" on page 27
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.	
Width	If desired, change the width of the screen in which **Ektron CMS400.NET** 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.
Height	If desired, you can change the height of the screen in which **Ektron CMS400.NET** 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 **Update**, describing the button, in the illustration below 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. You can click **Select Page** to browse to the landing page. The last published version of the page appears. If the page has never been published, nothing appears. 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. *See Also:* "Workarea Navigation" on page 10 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 **Ektron CMS400.NET** 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.

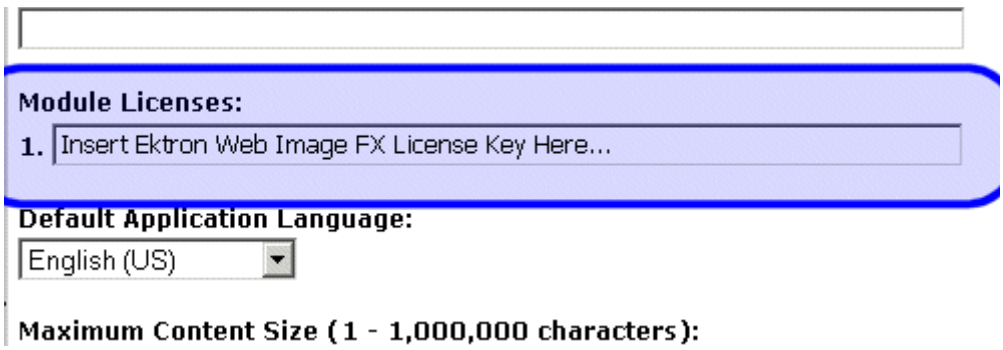
4. Make the necessary changes.
5. Click the Update button ( ).

Enabling WebImageFX

When purchasing Ektron CMS400.NET, 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 CMS400.NET, you should have received an email with a license key for WebImageFX as well.

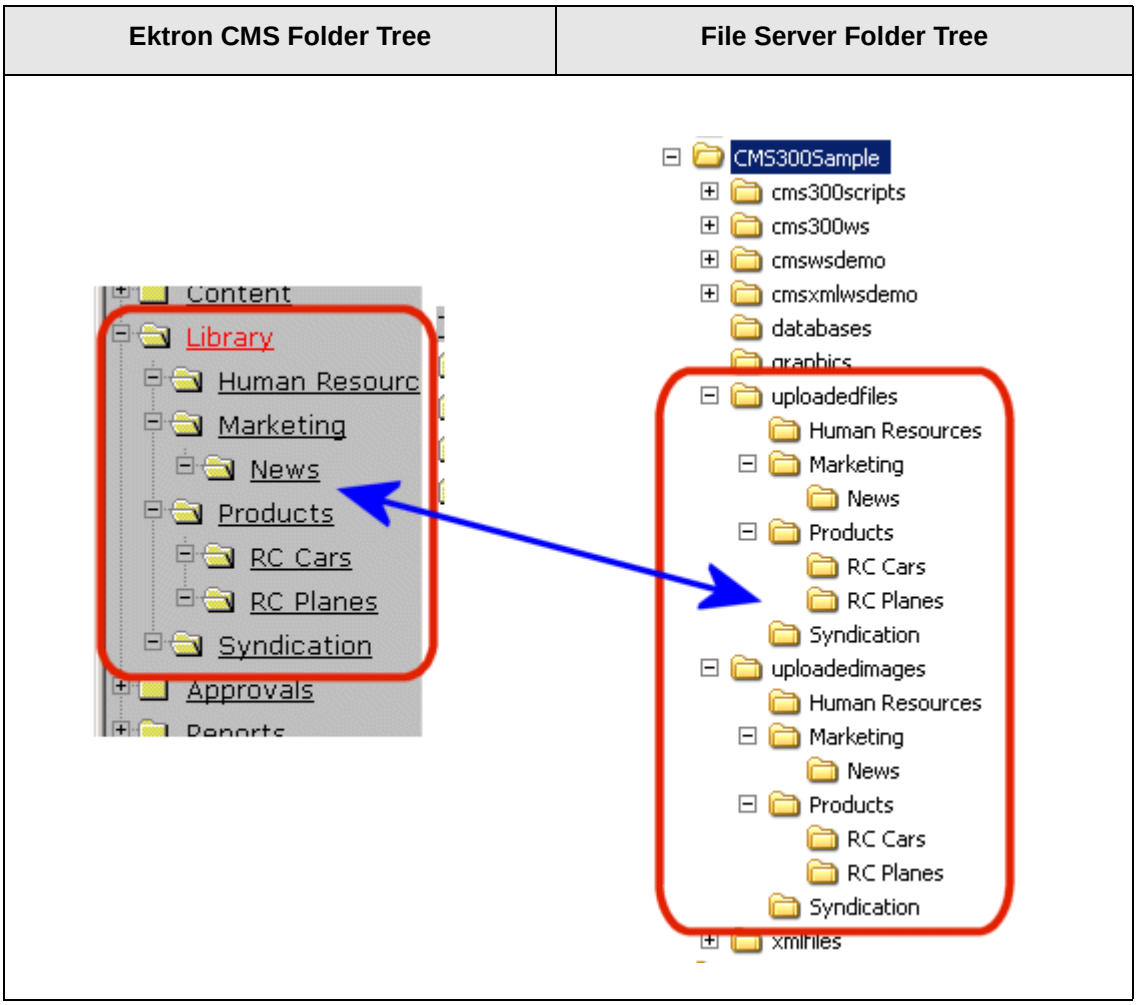
To enable WebImageFX within Ektron CMS400.NET, from the application setup page, insert the WebImageFX license key in the **Module License** field.



Enabling CMS to Create File System Folders

If this option is enabled, each time a new content/library folder is created in Ektron CMS400.NET, a corresponding physical folder is created on the file system. This helps organize library assets on your file server.

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



NOTE 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 Ektron CMS400.NET setup screen. The builtin user's primary function is to be an emergency user if you cannot log in to your Ektron CMS400.NET Web site as the normal administrator.

NOTE The builtin user can log in to Ektron CMS400.NET whether or not Active Directory is enabled.

Only use the builtin user to correct a bad or expired license key. It is not desigend for regular CMS operations. If you try to edit content while signed on as this user, you will see errors.

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 screen, as described in "Updating Setup Information" on page 22.
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 ( ).

Editor Options

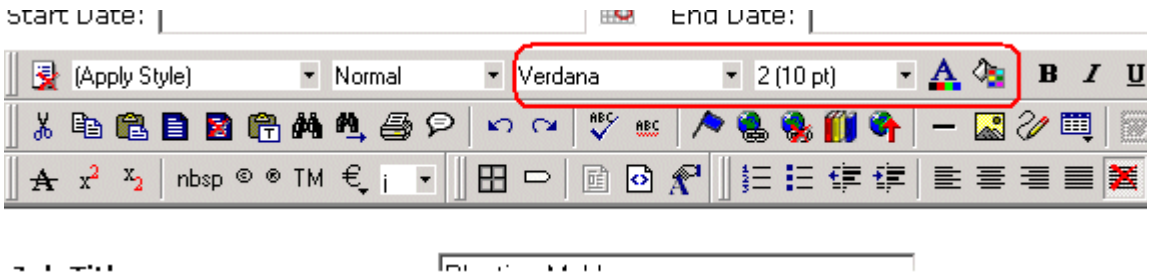
With the demand of style sheet use over standard font related tags, Ektron CMS400.NET allows you to choose between the two. To minimize the size of content blocks, style sheets reduce the amount of font tags that are stored with the content block.The editor options section allows to specify how you want the editor to handle this issue.

Explained in the following table are the editor options that you may set in Ektron CMS400.NET.

Editor Option	Description
Enable Font Buttons	Enabling font buttons will display the following font related buttons on the toolbar in the editor: • Font Face • Font Size • Font Color • Font Background Color *See Also:* "Enable Font Buttons" on page 29 Note: If **Remove Styles** is checked (see below), all inline styles added to the content are removed when the HTML is cleaned.
Disable Font Buttons	Disabling font buttons from the editor toolbar will remove the buttons specified above. To enable users to apply font related attributes to text, you will need to set up a style sheet for the content folder the content block belongs to. *See Also:* "Disable Font Buttons" on page 29
Remove Styles/ Do not Remove Styles	If **Remove Styles** is checked, all inline styles added to the content are removed when the HTML is cleaned. Note: Ektron recommends removing inline styles. It gets rid of inline styles added to content pasted from Microsoft Word.
Preserve MS-Word Styles (only available if you choose **Do not Remove Styles**)	When content from MS Word is cut and pasted into the editor, the editor, by default, removes some MS-Word styles. Preserving MS Word styles prevents the editor from removing them. Ektron does *not* recommend enabling this feature.
Preserve MS-Word Classes	Similar to styles, when content from MS-Word is cut and pasted into the editor, the editor, by default, removes some MS-Word classes. Checking this box prevents the editor from removing them.

Enable Font Buttons

Here is the editor with font related buttons enabled.

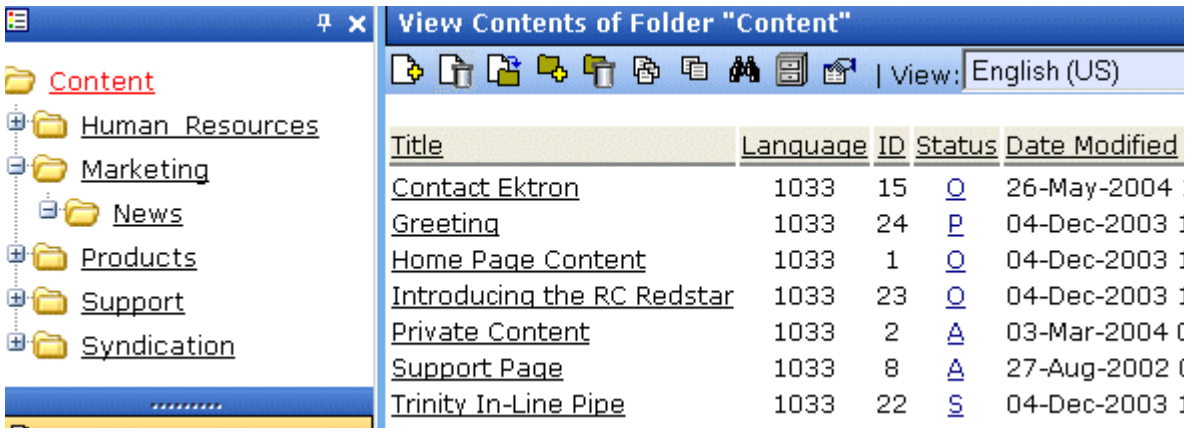


Disable Font Buttons

Here is the editor with the font buttons disabled.

Managing Content Folders

When you enter the Content folder in Ektron CMS400.NET 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. Below is the Content folder.



This chapter explains how to add, edit, publish, and delete content blocks. Permissions and Approvals are explained in later chapters.

What's In This Chapter

The following information is included in this chapter:

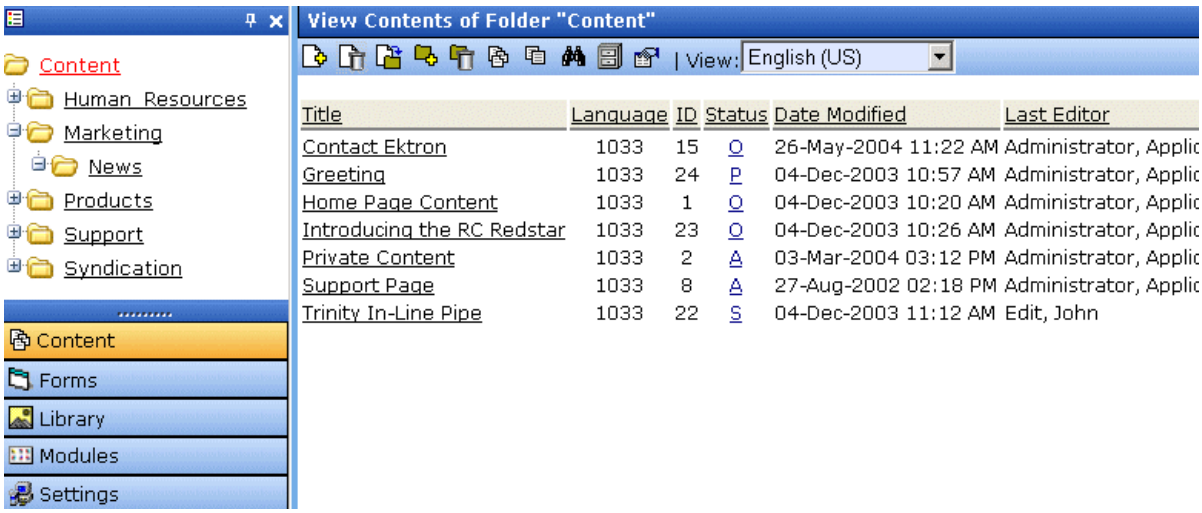
- "Accessing the Content Folder" on page 31
- "Folder Properties" on page 33
- "Purge History" on page 35
- "Adding Sub-Folders" on page 36
- "Deleting Folders" on page 37
- "Search Content Folder" on page 37

Accessing the Content Folder

To access a content folder, follow these steps.

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 appears in the main section of the Workarea, and the content folder expands to display the sub-folders.



From the content folder, you can perform administrative actions, as well as maintain content. Each folder displays 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 Multi-Language Content" on page 311
ID	The number Ektron CMS400.NET assigns to the content block. It is used to retrieve the content from the database.
Status	The current status of the content block. *See Also:* "Content Block Status" on page 15

Field	Description
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
	Add Content	Open the editor and create a new content block in the current folder.	"Adding Content" on page 49
	Delete Content	Delete several content blocks at once.	"Deleting Folders" on page 37
	Move Content	Move content blocks from one content folder to another	"Moving Content" on page 59
	Add Folder	Add a sub-folder to the current folder.	"Adding Sub-Folders" on page 36
	Delete Folder	Delete the current folder. Note: You cannot delete the parent folder, **Content**.	"Deleting Folders" on page 37
	Collections	Add, edit, or delete a collection from the folder.	"Collections" on page 284
	Search	Search through content in the workarea.	"Search Content Folder" on page 37
	Archived content	Displays content that passed its scheduled End Date and whose archive option is either **Archive and remove from site** or **Archive and remain on Site**	See the **Ektron CMS400.NET** User manual section "Scheduling Content to Begin and End" > Setting Archive Options

Button	Name	Description	More Information
	Properties	View properties of current folder. In the properties window, you can set permissions, approvals, etc.	"Folder Properties" on page 33

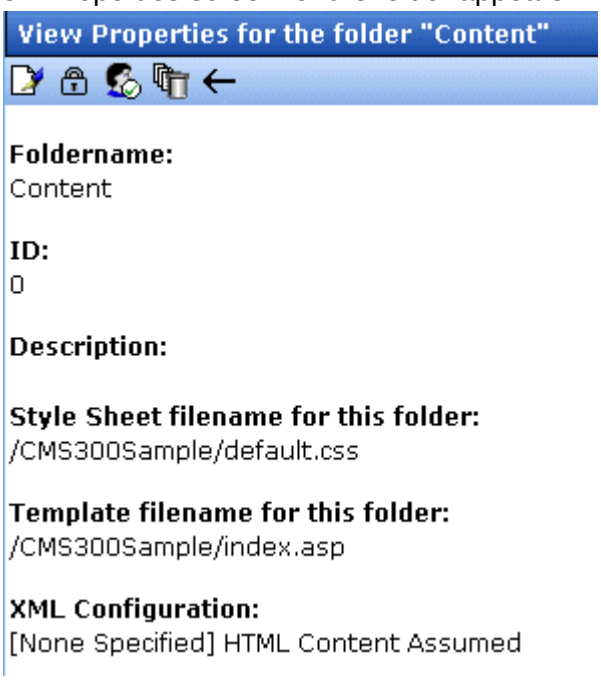
Folder Properties

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

Accessing the Folder Properties Screen

To access the folder properties screen:

1. Navigate to and click the content folder you want to edit the properties for.
2. The contents of the selected folder appear.
3. Click the properties ( ) button.
4. The View Properties screen for the folder appears.



Folder Properties Toolbar

The folder properties screen contains the following toolbar buttons.

Button	Name	Description	More Information
	Edit Properties	Access the Edit Folder properties screen	"Editing Folder Properties" on page 34
	Permissions	Access permissions table for content folder	"Setting Permissions" on page 85
	Approvals	Access approvals table for content folder	"Setting Approval Chains" on page 93
	Purge History	Access purge history table for content folder	"Purge History" on page 35
	Back	Go to previous screen	

Editing Folder Properties

A content folder's properties consist of folder name, style sheet, template, and XML configuration. To edit any properties of a content folder, follow these steps.

1. Access the View Properties screen for the content folder you want to edit, as described in "Accessing the Folder Properties Screen" on page 33.
2. Click the Edit button ( ).
3. The Edit Properties screen for the content folder is displayed.
4. Make the necessary changes to the content folder's properties. Use the following table to assist you.

Fields on the Edit Content Folder Screen

Field	Description
Folder name	Edit the name of the content folder. Note: You cannot change the root folder name.

Field	Description
Description	Edit the description of the content folder.
Style Sheet filename for this folder: (leave blank to inherit)	Specify a new style sheet that defines the styles of the content blocks that belong to the content folder. Or, leave this field blank to inherit the style sheet from the parent content folder.
Template filename for this folder: (leave blank to inherit)	Specify a new default template for the content folder. Or, leave this field blank to inherit the 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. *See Also:* "Assigning XML Configurations" on page 152

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

Purge History

The Purge History option lets you delete historical versions of content blocks in a folder. When purging, your options are

- specify a date before which historical versions are purged
- indicate whether the purge includes a folder's subfolders
- purge published as well as checked-in versions of content blocks

To purge the history for a content folder, follow these steps,

1. Access the view folder properties screen for the content folder you want to purge the history for, as described in "Accessing the Folder Properties Screen" on page 33.
2. Click the Purge History button ( ).
3. The Purge History screen appears.

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 versions to purge. When specified, only historical versions with a date before this date are purged.	Yes
Recursive	Purges historical records for content in this folder's sub-folders.	No
Purge versions marked as Published	Purges published versions of content blocks as well as checked-in versions.	No

5. Click the Purge History button ( ) to execute the purge.
6. A confirmation message is displayed.
7. Click **OK** to continue.
8. Ektron CMS400.NET executes the purge and displays a confirmation when complete.

Adding Sub-Folders

To further organize content in your Ektron CMS400.NET Web site, you can create sub-folders to store related content blocks.

To add a sub folder:

1. Navigate to and click the folder within which you want to create a sub-folder.
2. Click the Add Folder button ( ).
3. The Add a Subfolder to Folder screen is displayed.
4. Enter the required information in the fields. See "Fields on the Edit Content Folder Screen" on page 34
5. Click the Save button ( ).

You can modify the subfolder's properties, permissions, approval chain, etc. For a list of options, see "Folder Properties Toolbar" on page 34.

Deleting Folders

You can delete obsolete folders from the Ektron CMS400.NET Web site.

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

To delete a content folder, follow these steps.

1. In your Workarea, navigate to the content folder you want to delete.
2. Click the Delete Folder button ( ).
3. A confirmation message is displayed.
4. Click **OK**.

Search Content Folder

You can search a folder to quickly locate a content block within your Web site. You can use this feature to find content blocks when you know the text that needs to be updated but are unsure of how to navigate to its content blocks via the Website or their folders.

The search only looks through the current folder and its subfolders. So if you want to search your entire site, begin the search in the root content folder.

The following section explains how to use the content search.

Accessing the Search Content Screen

To access the search content screen, follow these steps.

1. Navigate to any content folder in the Workarea
2. Click the Search button ( ).
3. The Search Content Folder screen appears.

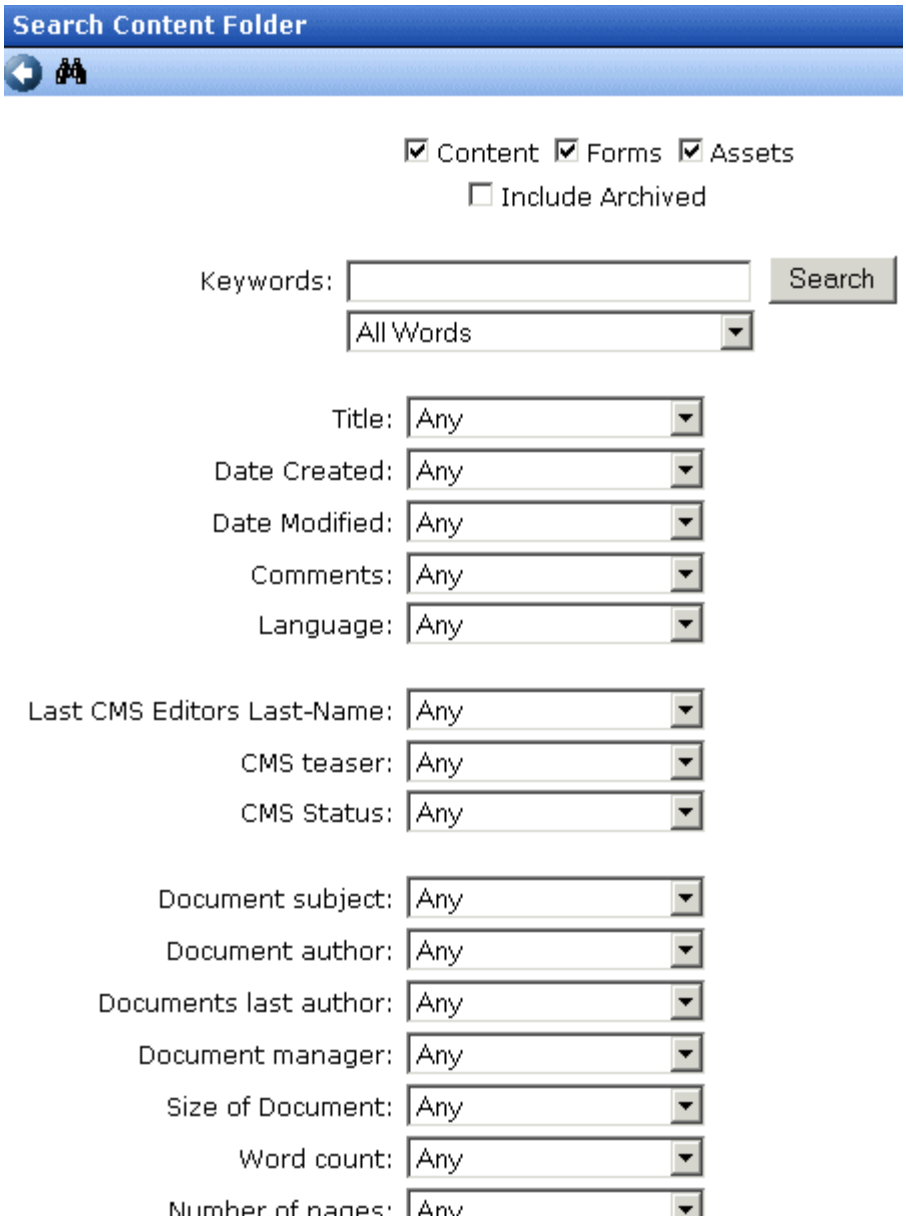
.

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

Field/Option	Description
Keywords	Enter keywords for the search.
Type of search	Customize the search to only return results that occur in: • **Content Title** - searches only the titles of the content blocks. • **HTML Only -** searches both the content and the HTML tags of the content blocks (useful for searching for hyperlinks and images). • **Text Only** - searches only the raw text of the content block, no HTML • **Metadata** - searches the metadata assigned to the content blocks.
Unpublished Content	Check 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 next to the **Enter keywords** field to begin the search.
6. All results that match the search criteria within the current folder and its subfolders appear.

7. If desired, click a content title to access the view the properties for the content.



Advanced Search

The advanced search screen prompts you to specify

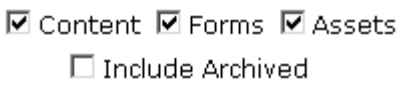
- the kind of content you want to search (for example, HTML content blocks)
- a search word or words
- how the search words must match the content in order for an asset to be found by the search
- *metadata* values to use as search criteria. The search only returns content that meets your criteria.

NOTE *Metadata* refers to information about a content block or file. For example, the date when it was created, the user who created it, and its language.

Each feature is explained below.

Specifying the Kind of Content to Search

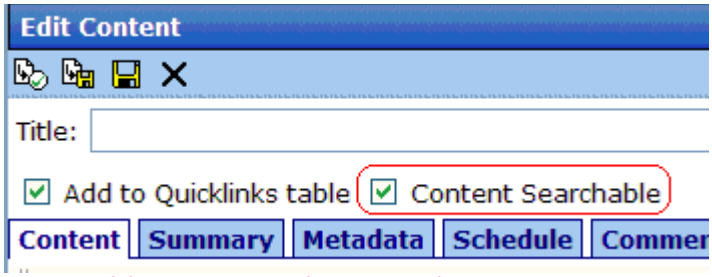
Near the top of the screen, four check boxes let you determine the kinds of content to search.



Check this box	To search
Content	HTML content blocks
Forms	HTML forms
Assets	Assets
Include Archived	Any of the above file types that have been archived. *See Also:* "Setting Archive Options" on page 53

IMPORTANT! The search only considers content whose **Content Searchable** box is checked. The **Content Searchable** box appears on the Edit Content screen above the

editor.



Also, the status of the content must be Approved.

Specifying the Search Word or Phrase

In the text field, enter the word or words that you want to find the within selected the file types. The search uses these words to find and return content.

For HTML or form content blocks, entering one or more words here is optional. That is, you can use fields on the lower portion of the screen to find content without knowing any words in the assets. For example, you can find every HTML content block that was modified by a certain user within the last 30 days.

However, for assets you must enter some search text.

IMPORTANT! The search only finds assets if you enter some text into the **Search Text** field.

The Noise Files

If you are searching for assets, Windows has a *noise* file that screens from the search every single letter of the alphabet as well as common words. Examples of common words are **about**, **after**, **all**, and **also**. You should avoid entering such words into the **Search Text** field, because the search ignores them.

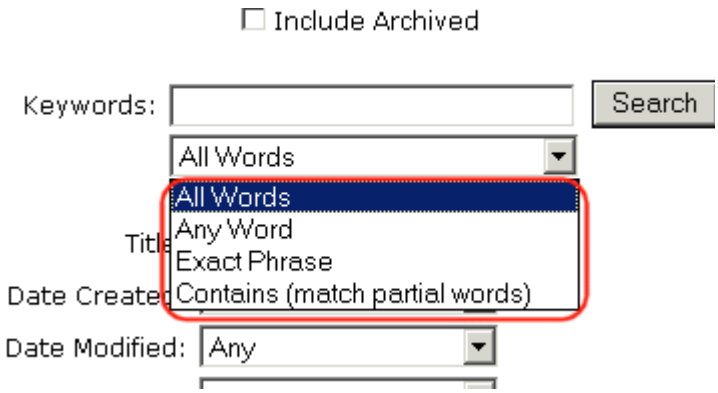
To find the list of noise words, search your computer for files named noise.*xxx*, where xxx is a three-letter abbreviation for the language. For example, noise.eng lists English noise words.

You can open a noise file with a simple word processor program, such as Notepad, to view any language's noise words. You can also edit the file. For example, you can remove words that users should be able to search on.

Specifying Match Criteria

NOTE This field is only applicable if you entered one or more words in the text field.

From this dropdown list, select criteria for how the search word or words must appear within the content of the files being searched.



Your choices are described below.

Choice	A search returns content that has
All Words	all words in the search field
Any Word	any word in the search field
Exact Phrase	all words in the order specified in the search field
Contains (match partial words)	any part of any word in the search field

Match Criteria Examples

The examples below assume you entered these words into the search text field.

- partners
- content
- Monday
- employee
- green

All Words

All Words works like an “and” function. The search returns only content that has the words partners *and* content *and* Monday *and* employee *and* green. The words can be in any order within the file.

Any Word

Any Word is almost the opposite of All of the Words. It works like an “or” function.

When you select this option, the search returns all files that have *at least one* of the words entered in the search text field. In other words, it returns files with the word partners *or* content *or* Monday *or* employee *or* green.

Exact Phrase

Exact Phrase returns content blocks that have all five words in the order specified in the search text field.

A better example would be to search for a phrase, such as Content Management Solution. The search yields only content blocks with that exact phrase.

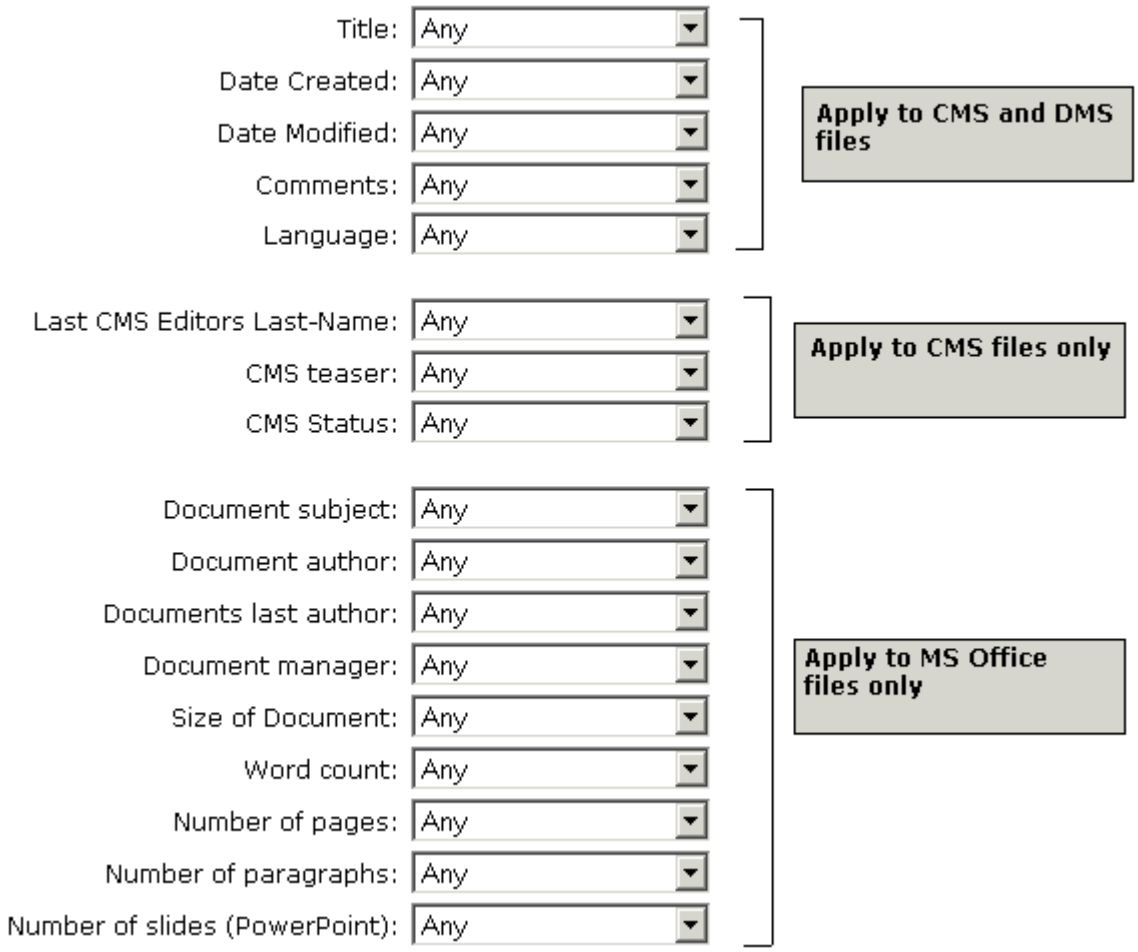
Contains (Match Partial Words)

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 select Match Partial Words. The search returns all content with the letters **at**, finding words such as **At**, B**at**, Ch**at**ter, **At**oll, **AT**M, etc.

Metadata Information Search

The next section of the search screen lets you add search criteria about the metadata of the files being searched. Metadata refers to information about a content block or file. For example, the date when it was created, the user who created it, and its language.

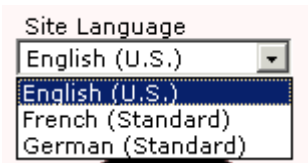
The kinds of metadata that can be searched are illustrated below.



As you can see, the top five fields apply to all file types. The next three only apply to CMS content or form blocks, and the last nine only apply to Microsoft Office files.

Fields that Apply to CMS and Office Assets

Search criterion	Description
Title	In CMS, the content block or form title. In AMS, the Title field in the file's Properties window.

Search criterion	Description
Date Created	The file's creation date.
Date Modified	The late date when the file was modified.
Comments	In CMS, the content block or form's comments, which can be inserted via the **Comment** tab. In AMS, comments are inserted in the file's Properties window's **Summary** tab.
Language	Each file in CMS and AMS is assigned a language property when it is created or imported. Note: This field determines the language of the content being searched. The language dropdown list (shown below), which appears on every standard template supplied by Ektron, has no effect on which content is searched. 

Fields that Apply to CMS Files Only

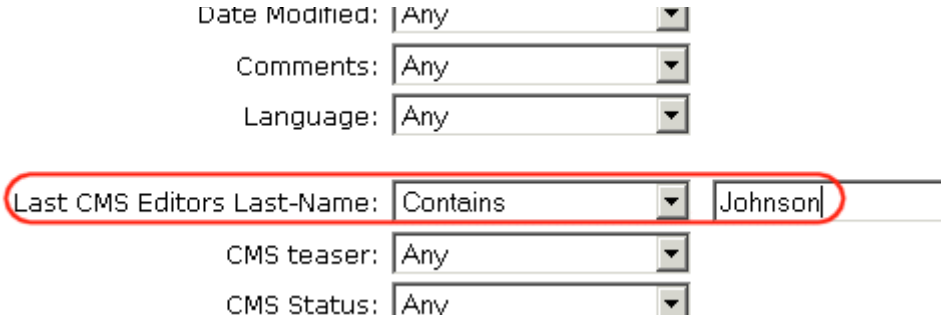
Search criterion	Description
Last CMS Editor's Last Name	The last name (surname) of the user who most recently changed the content or form block.
CMS teaser	The content block summary. *See Also:* "Adding a Content Block Summary" on page 56
CMS Status	The content block status. *See Also:* "Appendix A: Content Statuses" on page 394 Note: Although you can search for content blocks by any status, when the search results appear and you click a content block to view it, only the most recently published version appears. If a version has never been approved, nothing appears.

Fields that Apply to MS Office Files Only

Search criterion	Description
Asset subject	As inserted into the **Subject** field on the File Properties window's **Summary** tab.
Asset author	As inserted into the **Author** field on the File Properties window's **Summary** tab.
Assets last author	As displayed on the read-only **Last saved by** field on the the File Properties window's **Statistics** tab.
Asset manager	As inserted into the **Manager** field on the File Properties window's **Summary** tab.
Size of Asset	As displayed on the read-only **Size** field on the File Properties window's **General** tab.
Word count	As displayed on the read-only **Statistics: Words** field on the File Properties window's **Statistics** tab.
Number of pages	As displayed on the read-only **Statistics: Pages** field on the File Properties window's **Statistics** tab.
Number of paragraphs	As displayed on the read-only **Statistics: Paragraphs** field on the File Properties window's **Statistics** tab.
Number of slides (PowerPoint)	As displayed on the read-only **Statistics: Slides** field on PowerPoint's File Properties window's **Statistics** tab.

Tips on Responding to Search Criteria Fields

- If the search field is a text field, you specify **contains** or **not contains**. Then, a text field appears to the right.

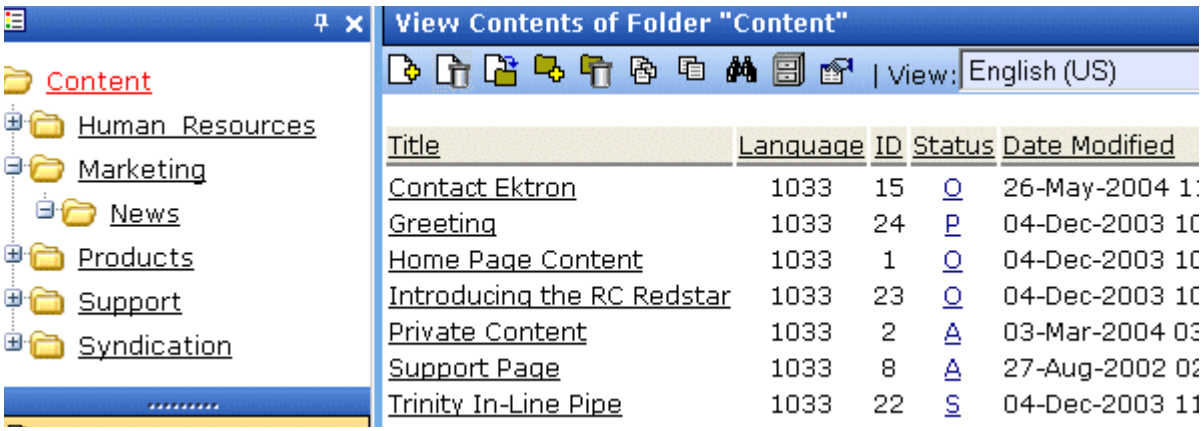


Here, enter the search text for that field. For example, if the field is **Last CMS Editors Last-Name**, and you insert **Johnson** into the text field, the search finds all files authored by anyone whose last name is **Johnson**.

- If the search field is a date field, the dropdown list lets you choose **Before**, **Between**, or **After**.
  - Use **Before** to select all dates *prior to* a specified date
  - Use **After** to select all dates *later than* a specified date
  - Use **Between** to select dates by specifying a beginning and end date. All dates in between are considered.
- If the search field is numeric, the dropdown list lets you choose **Less Than**, **More Than**, **Equal To**, or **Between**.

Managing Content

When you enter the Content folder in Ektron CMS400.NET 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. Below is an example of the Content folder.

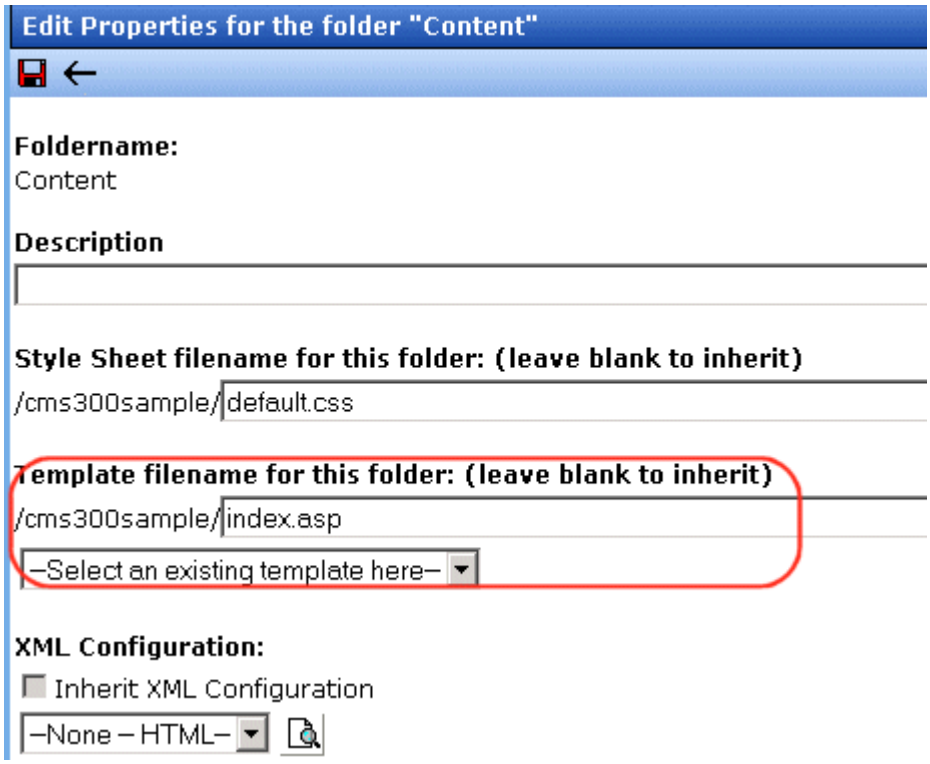


This chapter explains how to add, edit, publish, and delete content blocks. Permissions and Approvals are explained in later chapters.

Creating/Updating Templates

As part of the setup of your **Ektron CMS400.NET** Web site, someone in your organization created the templates for your Web pages. A template typically includes page headers and footers as well as places for content blocks, forms, summaries, calendars, collections and all the other page elements for which functions exist.

You specify a content block's template in its folder. The folder can have a unique template assigned to it or inherit the template from its parent folder. The following illustration demonstrates where you would identify a template in the folder properties screen.



Adding Content

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

See Also: "Creating a New Content Block" on page 318; "Translating a Content Block" on page 318

Adding HTML Content

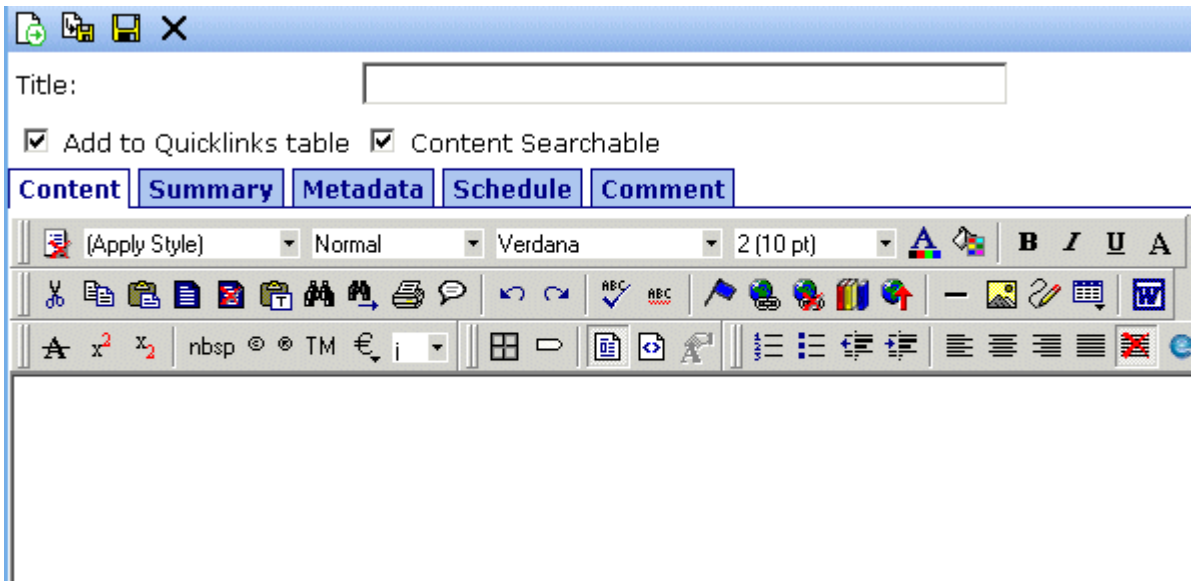
As an administrator, you can add content to the Ektron CMS400.NET Web site. This means that you create content blocks to display on your Web site.

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. Select the language of the content block you want to create from the language drop-down. *See Also:* "Working with Multi-Language Content" on page 311
3. Click the Add Content button ( ).
4. The Add Content window opens.



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

Field	Description
Title	Enter a title for the content block.
Add to Quicklinks Table	Check this box if you want to save a Quicklink to this content block when you save the content. If you uncheck this box, **Ektron CMS400.NET** does not create a quicklink for this content block. *See Also:* "Quicklinks" on page 102

Field	Description
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, **Ektron CMS400.NET** excludes the content block when a search is performed. *See Also:* "Searching Content on the Web Site" on page 436
Body Text	Insert content that will be viewed on the Web site.

NOTE For additional information about using the editor supplied with Ektron CMS400.NET, refer to Using eWebEditPro in the Ektron CMS400.NET User Manual.

6. After you enter the content, you have the following options.

Button or Tab	Description
Summary	Edit the summary for content block. *See Also:* "Adding a Content Block Summary" in the **Ektron CMS400.NET** User manual Note: You can restrict a summary's length in the configuration setup screen.
Metadata	Edit the metadata for content block. *See Also:* "Metadata" on page 79
Schedule	Assign start or end dates, or both, for when content is published to Web site. *See Also:* "Scheduling Content" on page 63
Comment	Enter history comment to indicate changes made to content.
Submit	Submit content block into 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. Clicking 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 button 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.

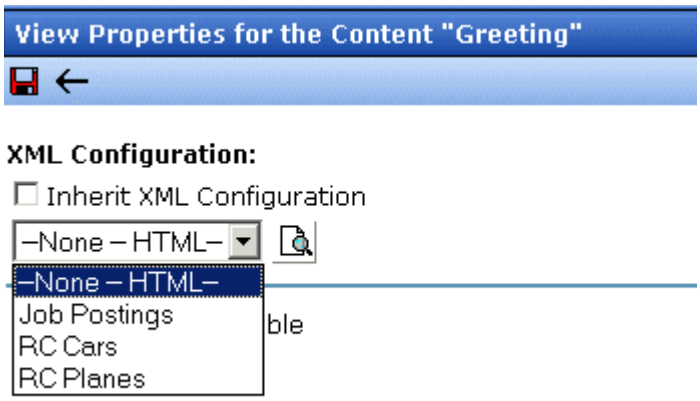
Adding XML Content

If a content folder or content block has an XML configuration assigned to it, users can create XML content within it.

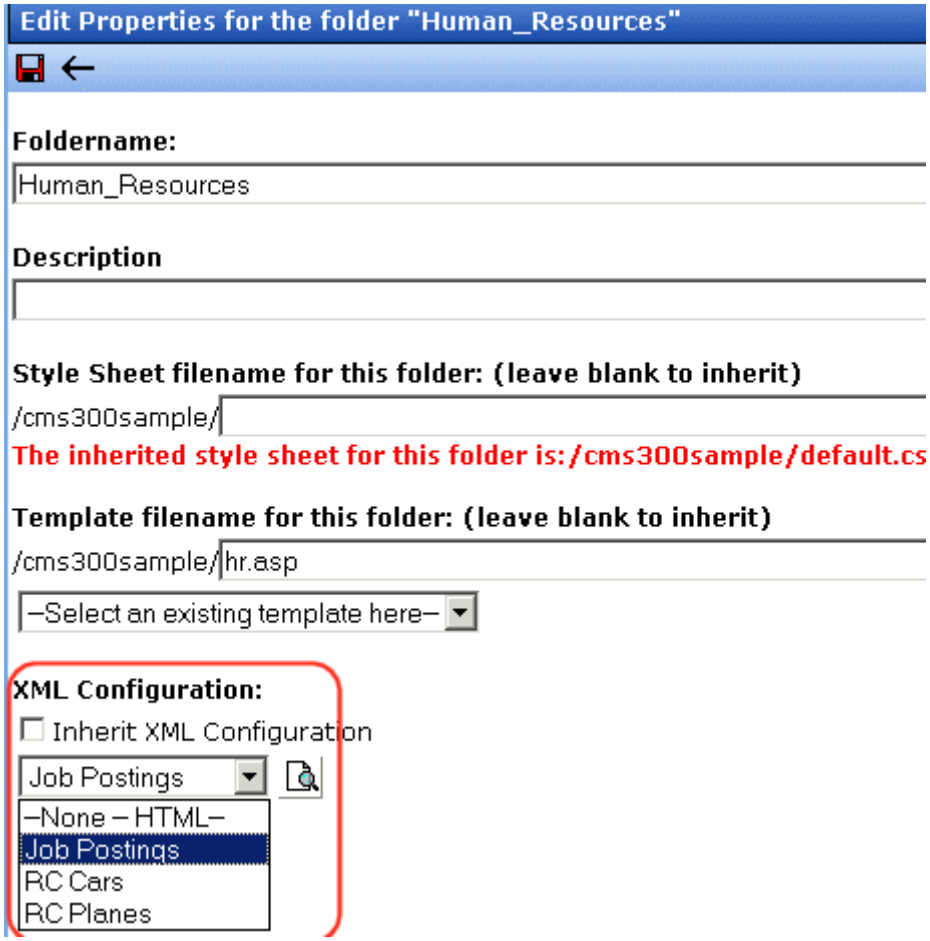
Assigning an XML Configuration

You can assign an XML configuration to an individual content block or its parent folder. Similarly, a folder (other than the root content folder) can have a unique XML configuration or inherit one from the parent folder. *See Also:* "Assigning XML Configurations" on page 152

XML Configuration on Content Block Properties Screen



XML Configuration on Folder Properties Screen



Adding an XML Content Block

To add an XML content block, 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 permissions for it.

2. Follow the steps described in "Adding HTML Content" on page 49.

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

If a content block has an XML configuration, it is used to format the screen display. When an XML content block is published and a site visitor completes the XML screen, the user's input is saved as XML. For more information, see "Managing XML" on page 144.

Forming URLs For Ektron CMS400.NET Documents

Whenever a content block is created, **Ektron CMS400.NET** generates a quicklink, which is a unique identifier of that content block. *See Also:* **Ektron CMS400.NET** User Manual > "Library Folder" > "Quicklinks."

A quicklink for an Ektron CMS400.NET content block has these elements:

- Site address
- Template file name
- Content block ID number
- Language identifier

WARNING! Only use the language identifier if you are forcing or changing the language.

The Template

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 (you can set a default document for a template in the content function by inserting an id number).

The Content Block Variable

A question mark (?) separates the template URL from the content block variable. The content block variable indicates which document or content blocks the server places in the template before displaying the page. Below is a description of the URL format.

Content block variable	Example	Description
ID=n	`http://www.yourEktronwebsite.com / index.aspx?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 content block's id value.

The above variable's name is based on the templates included in the Ektron CMS400.NET's sample site. If your Web master changed the variable's names in your site's template, use the name of the corresponding variable in each template rather than the one above.

The Language Identifier

This part of the URL identifies the language selected by a visitor to your site. It only appears if your site supports multiple languages.

To learn more about multiple language support in **Ektron CMS400.NET**, see "Multi-Language Support" on page 311.

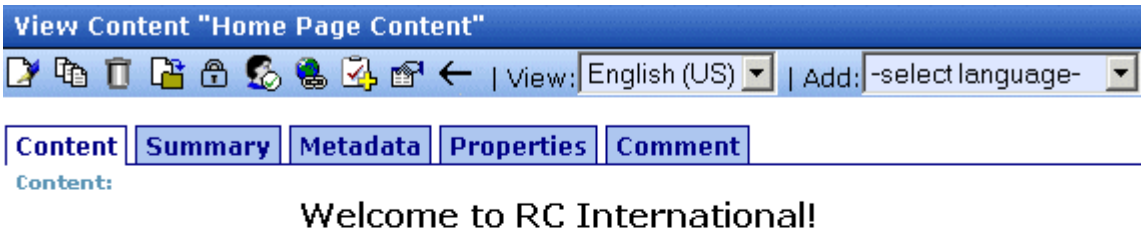
Viewing Content

You can preview all content blocks that have been created in your Ektron CMS400.NET Web site. Previewing lets you see the content, metadata, summaries, and other information about the content block.

Navigating to a **Ektron CMS400.NET** content block is similar to navigating to a file using Windows Explorer. The window has two frames. The left frame contains the top level folders. You drill down through the folders until you find the desired content block.

To view a content block in Ektron CMS400.NET, follow these steps.

1. Navigate to the content folder that contains the content block you want to view. A list of content blocks that belong to that folder is displayed.
2. Select the language of the content blocks you want to view.
3. Click the content block you want to view.
4. The View Content screen is displayed.



To learn more about the Content, Summary, Metadata and Comment tabs, see ”Adding Content” on page 49. The properties tab is described below.

Information on the Properties Screen

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

Field	Description
Content Title	Title assigned to content block
Content ID	Content ID # assigned to content block
Status	The content block current status. *See Also:* ”Content Block Status” on page 15
Last User to Edit	Last user to edit this content block.

Field	Description
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's "action on end date" is triggered. This may include being removed from the Web site. For more information, see the **Ektron CMS400.NET** User Manual section "Scheduling Content to Begin and End" > "Setting Archive Options."
Date Created	Date and time when this content block was created.
Approval Method	The approval method used for this content block. *See Also:* "The Approval Method" on page 99
Approvals	Approval chain for this content block. *See Also:* "Setting Approval Chains" on page 93
XML Configuration	The XML configuration assigned to the content block or inherited from the content folder. If no XML configuration is assigned, Ektron CMS400.NET assumes the content is HTML. *See Also:* "Assigning an XML Configuration" on page 52
Path	The folder path for the content block.
Content Searchable	Whether or not the content block is searchable.

Content Toolbar Buttons

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

Button	Name	Function	More Information
	Edit	Check out content block to change it.	"Editing Content" on page 58
	History	View previous version of content block; restore if desired	"Content History" on page 64

Button	Name	Function	More Information
	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 63
	Move Content	Move content block to another folder.	"Moving Content" on page 59
	Permissions	Assign permissions to content block. By default, permissions are inherited from parent folder.	"Setting Permissions" on page 85
	Approvals	Set up an approval chain for a content block. By default, approvals are inherited from parent folder.	"Setting Approval Chains" on page 93
	Link Search	Find content blocks with a link to displayed content block	"Link Checking" on page 65
	Add Task	Assign to a user a task about the content block.	
	Edit Properties	Change XML configuration assigned and whether content is searchable.	"Content Properties" on page 66
	Back	Go to previous window	
View (language)	View	If you can view content blocks in more than one language, select a language from the drop down list.	
Add **-select language-**	**Add** **-select language-**	Lets you copy current content block into new block and translate it to selected language.	"Translating a Content Block" on page 318

Editing Content

You can edit a content block in any of the following statuses: published, checked in, checked out by you, or submitted for your approval.

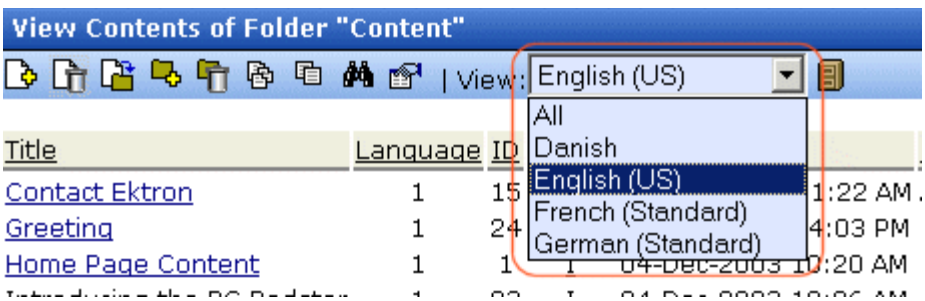
Ektron CMS400.NET has two types of content blocks.

- 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. Navigate to the content folder that contains the content block you want to edit. A list of content blocks that belong to that folder is displayed.
2. Select the language of the content block you want to edit.



3. Click the content block you want to edit.
4. Click the Edit button ( ).
5. The Edit Content window opens.
6. Make the necessary changes to the content block. Refer to "Adding HTML Content" on page 49 or "Adding XML Content" on page 52 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 a content block from any content folder to any other folder. This section explains how.

Who Can Move a Content Block

Only members of the Administrators user group can move content blocks.

Which Content Blocks Can Be Moved

Only a content block with a status of **Approved (Published)** can be moved. This included expired content. If a content block's status is not published, you must wait for it to reach that status before moving it.

Before You Move a Content Block

Since content is either HTML or XML, you may encounter several scenarios when moving a content block. The following table explains each scenario.

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

What is Moved?

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

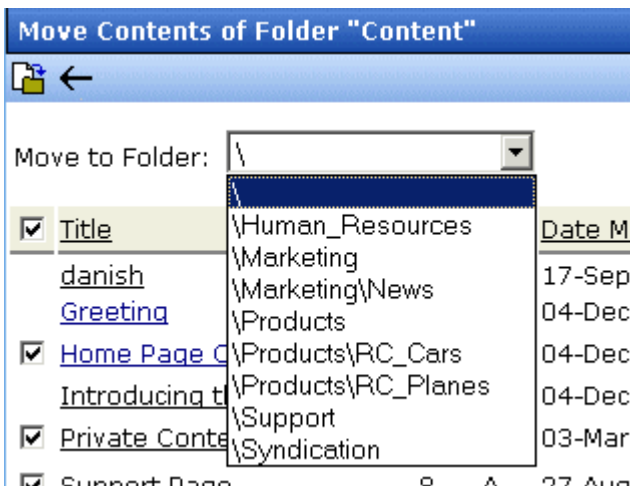
Also, the quicklink for the content block is moved in the library to the destination folder. However, the quicklink remains the same (that is, the default template doesn't change). You can update this by editing the quicklink. This procedure in described in the **Ektron**

CMS400.NET Administrator manual section Updating Default Template for Multiple Quicklinks.

Moving a Content Block

To move a content block to another folder, follow these steps.

1. Access the View Content screen for the content block you want to move, as described in "Viewing Content" on page 55.
2. Click the Move Content button ( ).
3. The Move Content screen is displayed.
4. From the drop down list, choose the content folder into which to move the content.



5. Click the Move Content button ( ).
6. A confirmation message is displayed.
7. Click **OK** to continue.
8. The content block is moved to the specified content folder, and the destination folder is displayed with the content block that was moved.

Moving Several Content Blocks at Once

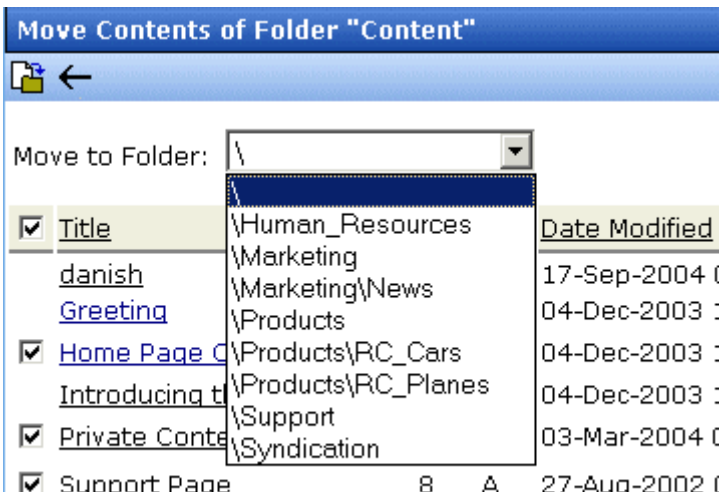
To move multiple content blocks at once, follow these steps.

NOTE Only published and expired content blocks can be moved.

1. Navigate to the content folder that contains the content blocks you want to move.
2. Click the Move Content button ( ).
3. The Move Contents of Folder screen is displayed.
4. Check the boxes next to the content blocks that you want to move.

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

5. Choose the content folder to move the selected content blocks to from the drop down list.



6. Click the Move Content button ( ) to move the selected content blocks.
7. A confirmation message is displayed.
8. Click **OK**.
9. The content blocks move to the destination folder.

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 CMS400.NET** User Manual.

Purging Historical Versions of Content Blocks

See "Purge History" on page 35.

Scheduling Content

Scheduling content allows you to specify a future date and time when a content block will be visible on the Web site. Similarly, you can remove a content block from the Web site on a specified date and time.

For more information, see Scheduling Content to Begin and End in the **Ektron CMS400.NET** 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 CMS400.NET database content blocks that are no longer needed on your Web site. To delete a content block:

1. Access the View Content screen, for the content block you want to delete, as described in "Viewing Content" on page 55.
2. Click the Delete button ( ).

   A confirmation message is displayed.
3. Click **OK** to delete the content block.

Deleting Several Content Blocks in a Folder

At the view content folder screen, 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.
2. Click the Delete Content button ( ).
3. The Delete Contents of Folder screen is displayed.
4. 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 ( ).
6. A confirmation message is displayed.
7. Click **OK** to continue.

Content History

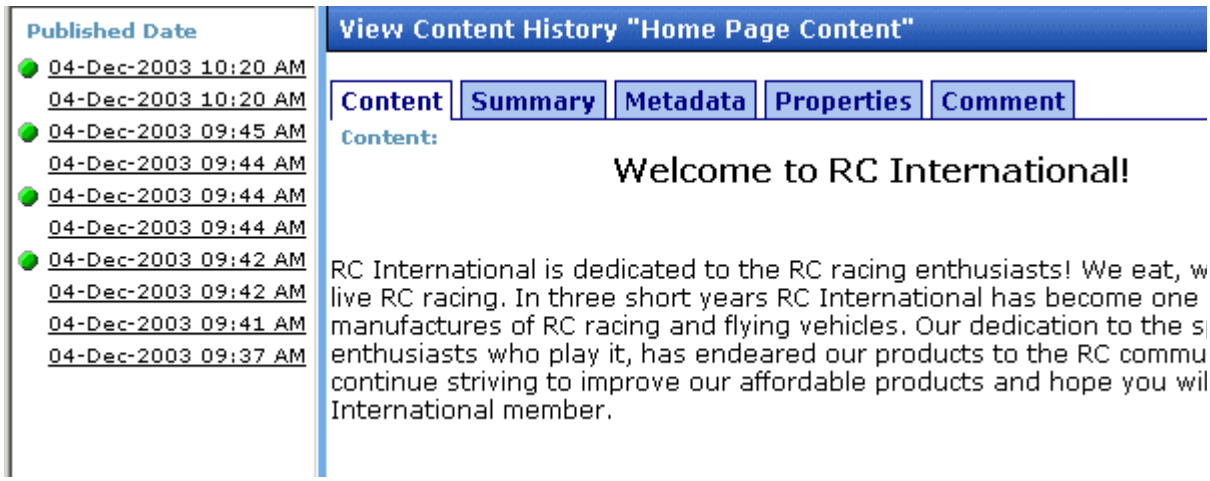
Each time a new version of a content block is published or checked-in, the previous version is stored in a history table. Old versions of a content block may be accessed in the view history table, and if desired, may be restored to the Web site.

Accessing the View History Window

To access the view history window:

1. Access the View Content screen for the content block you want to view the history of, as described in ”Viewing Content” on page 55.
2. Click the View History button ( ).

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



Managing Historical Version

For information about managing historical versions of content including:

- Viewing historical versions
- Comparing versions
- Restoring historical version

For more information, see the **Ektron CMS400.NET** user manual section “Viewing and Restoring Previous Content Blocks.”

Content Block Permissions

See ”Setting Permissions” on page 85.

Content Block Approvals

See ”Setting Approval Chains” on page 93.

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, follow these steps.

1. Access the View Content screen, for the content block you want to execute the link checker for, as described in ”Viewing Content” on page 55.
2. Click the Check Links button ( ).

   The search results screen is displayed with each content block that links to the current content block listed.
3. Click the content title to access the view content screen for the selected content block and perform the necessary actions on the content.

Assigning Tasks to a Content Block

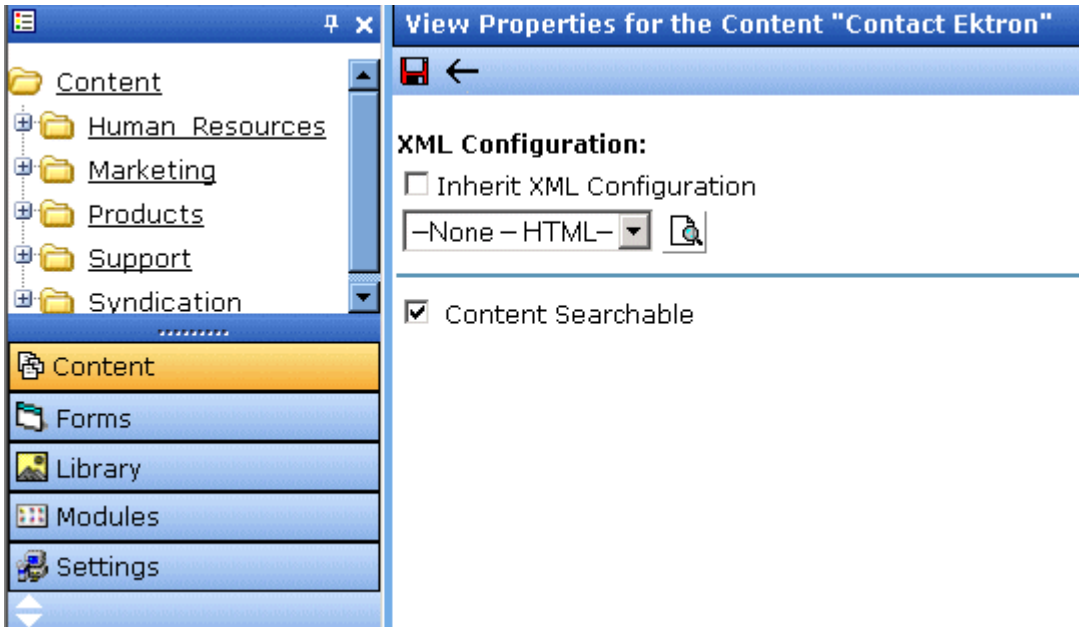
See the **Ektron CMS400.NET** Users Manual > “Managing Tasks” > “Creating Tasks via a Content Block”.

Content Properties

The content properties screen shows which XML configuration, if any, is applied to the content block. To view the content properties screen, follow these steps.

1. Access the View Content screen for the content block whose properties you want to view, as described in ”Viewing Content” on page 55.
2. Click the Properties button ( ).

3. The View Properties for the Content screen appears.



4. Make any necessary changes. For more information, see

- "Assigning XML Configurations" on page 152
- "Content Searchable" on page 51

5. Click the Update button ( ).

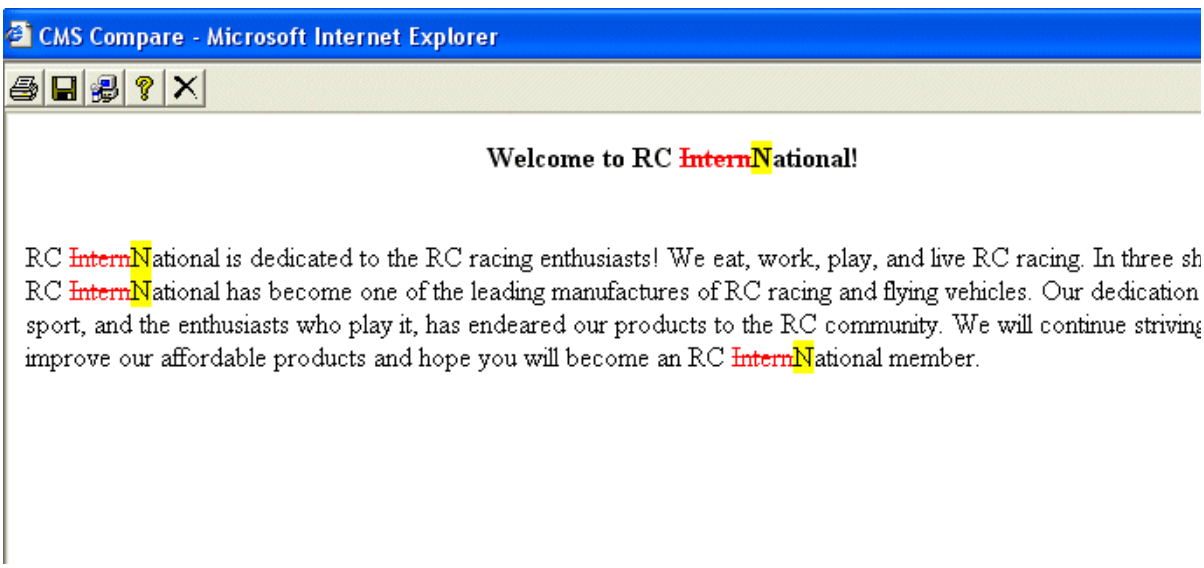
NOTE If you click the Properties button for a content block that is displayed on a Web page, the View Content screen opens in the workarea window.

Comparing Current and Previous Content Blocks

Ektron CMS400.NET 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.

NOTE The Purge History feature deletes historical versions of content blocks according to user-defined criteria. Therefore, some previous versions may be unavailable. *See Also:* "Purge History" on page 35

Below is an example of a published content block in Ektron CMS400.NET 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 CMS400.NET 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 ( ) in the content history area or the toolbar button ( ) on the Web page view.

The Compare Content Window

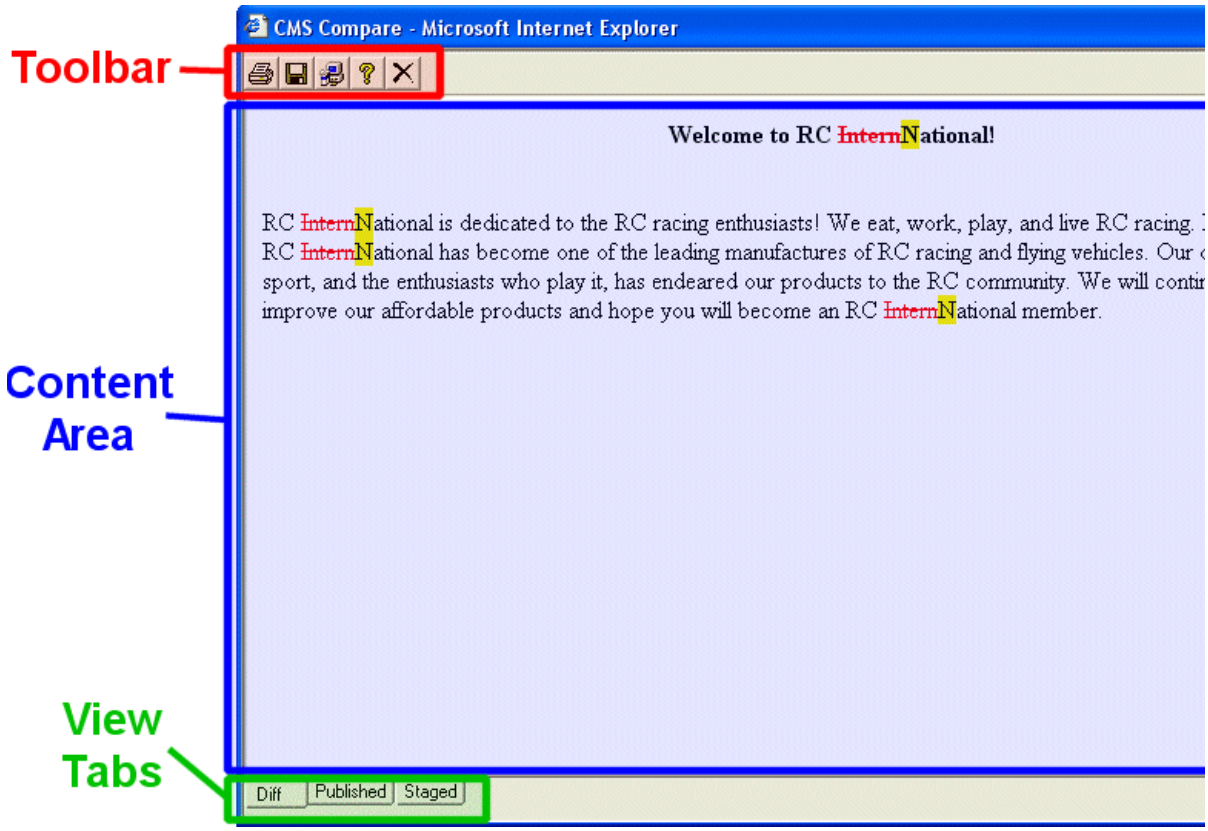
Before using the content compare feature, you should have some knowledge of the compare content window and buttons.

NOTE The first time the Ektron CMS400.NET 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

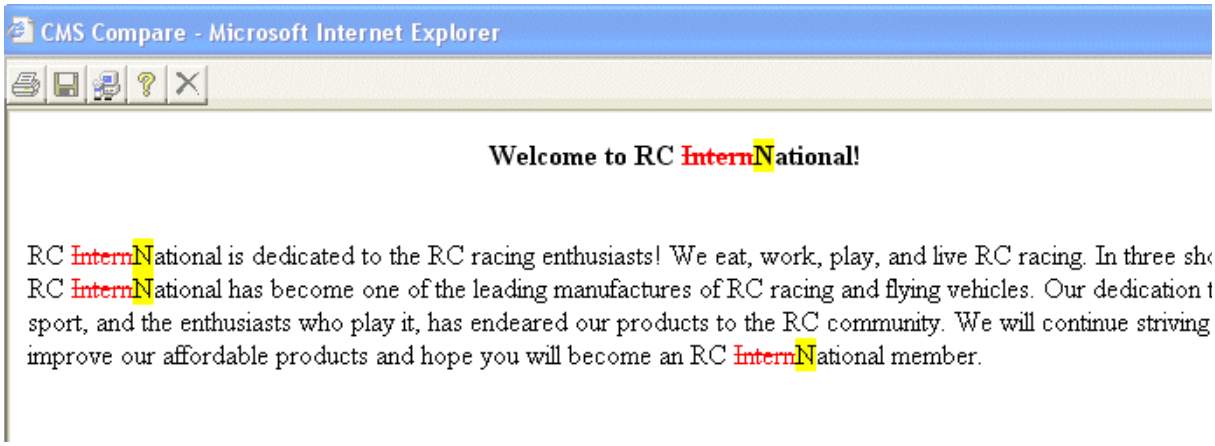
- View content tabs.



Each field is explained below.

Content Area

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



The following table explains each symbol on the screen.

Symbol	Example	Description
Plain Black Text	Trinitys new pipe and	Unchanged content.
Yellow Highlighted Text	Our dedication to the	Added Content.
Red, Struck-through text	~~dedicated to the RC~~	Deleted content.

Toolbar

The content comparison toolbar contains five buttons, explained below.

Button	Name	Description	More Information
	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
	Setup	Opens setup dialog box to configure the eWebDiff settings	”Setup” on page 72
	Help	Displays useful information about using eWebDiff.	
	Exit	Closes the window	

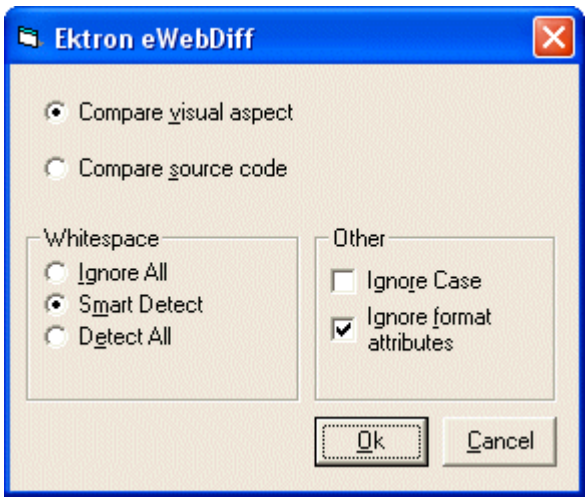
Save

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. Any changes are not saved to the Ektron CMS400.NET Web Server.

NOTE The save option save the version of the content you are currently viewing.

Setup

Clicking on the **Setup** command ( ) opens the Ektron CMS400.NET eWebDiff setup dialog box.



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.
Detect All	Blank (whitespace) characters are treated as any other character.
Other Options	

Option	Description
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:

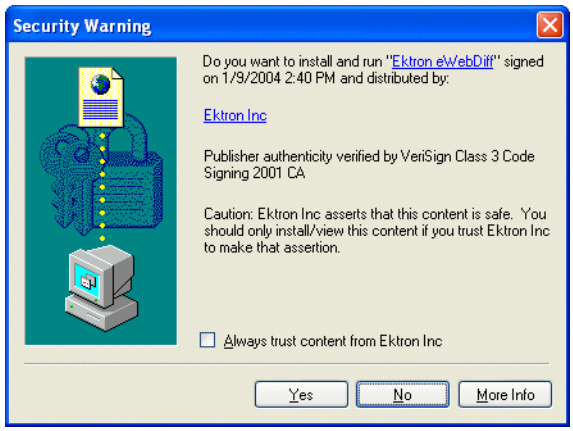
View	Description
Diff	Compares the published version of the content block to the staged version.
Published	Displays only the current published version.
Staged	Displays the staged, or historical version, of the selected content block.

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.



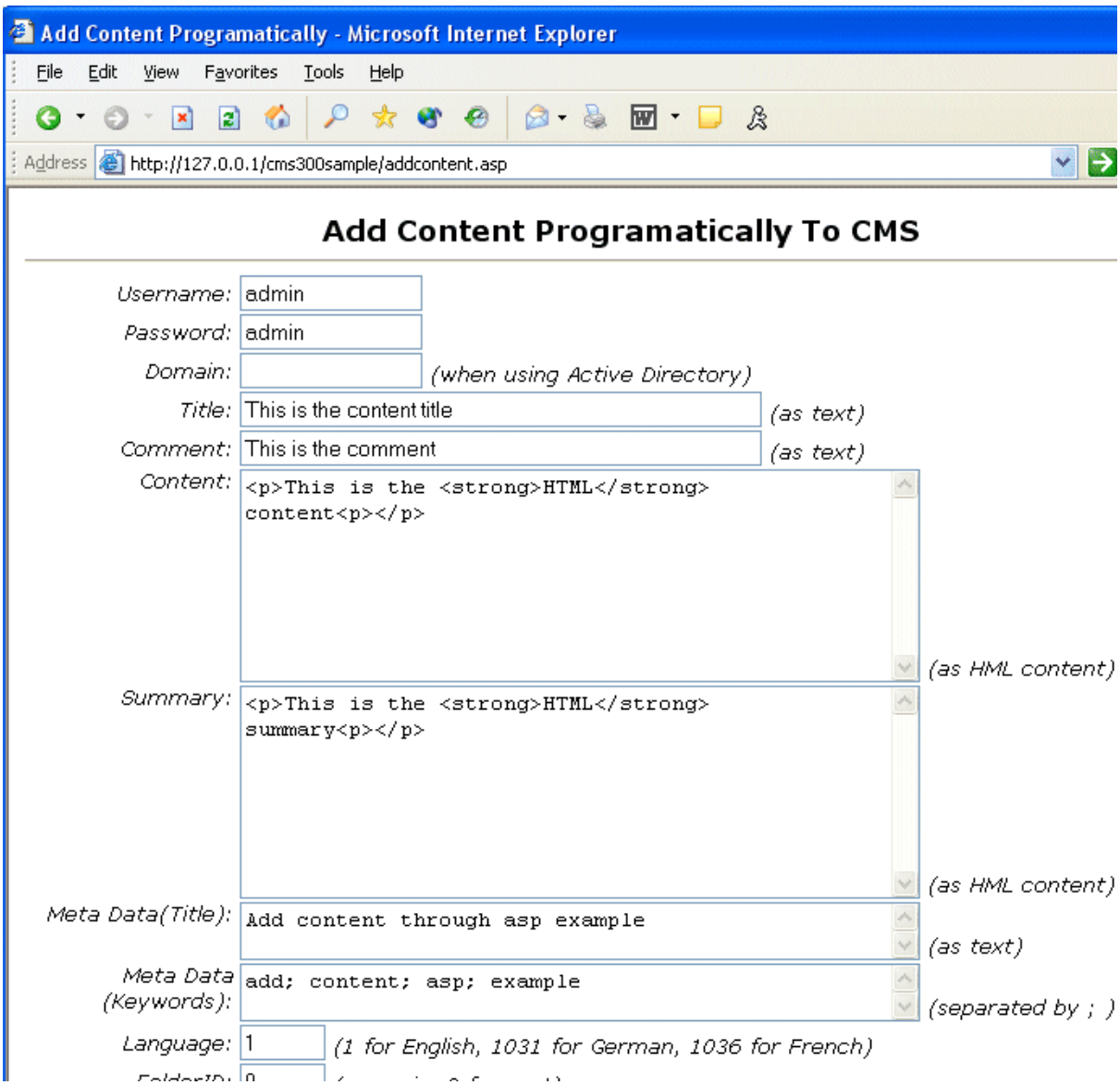
When the installation program completes, close and reopen eWebDiff.

Content Reports

The Reports folder contains various content reports. For information about them, see the Content Workflow Reports section of the **Ektron CMS400.NET** User Manual.

Adding Content Programmatically

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 logging in. Here is a sample Add Content form.



Your Web site developer can customize this form to better suit your needs. See the Ektron CMS400.NET Developer Manual for additional information.

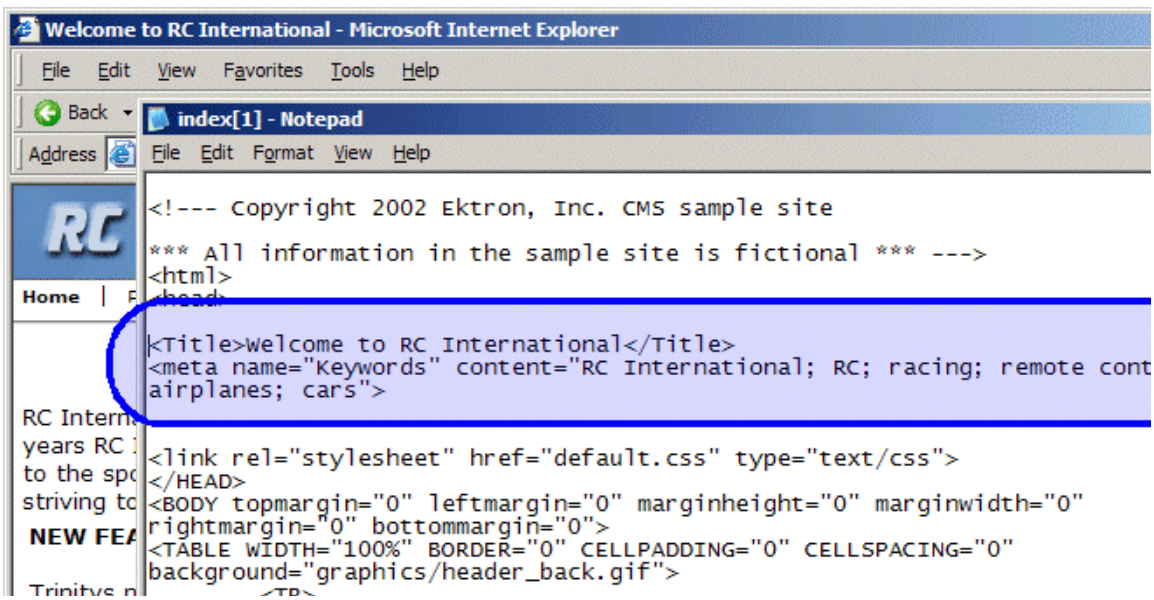
Metadata

Metadata resides in the source code of a Web page. Its purpose is to help search engines find your Web page.

The administrator defines the types of metadata that can be added to a content block. If your site supports multiple languages, you must create metadata definitions for each supported language.

When a user creates or updates a content block, he can define its metadata within the constraints specified by the administrator.

Below is an example of metadata in an Ektron CMS400.NET Web page.



As you can see, a title and keywords are defined for the content block.

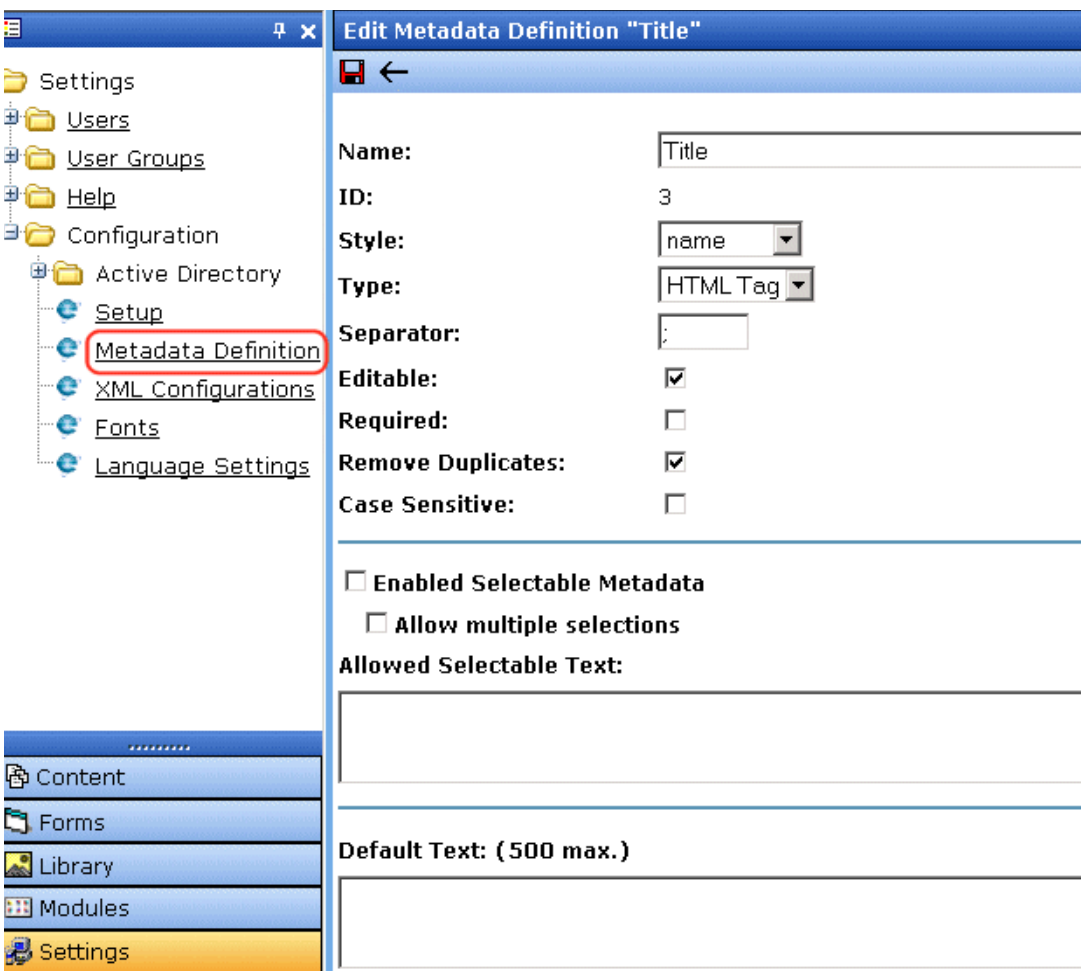
NOTE For background information about metadata, see http://www.w3.org/TR/REC-html40/struct/global.html#edef-META.

Displaying Metadata on Your Web Site

To learn how to display the metadata on your Web site, see the **Ektron CMS400.NET** Developer Manual section “Custom Functions (*for your server platform*)” > “Metadata Function.”

Managing Metadata Definitions

To allow a user to add metadata to a content block, use the Metadata Definitions Screen to define the types of metadata that can be added (such as keywords and title). When defining metadata, you are not limited but each type must be unique.



Adding a Metadata Definition

To define metadata, follow these steps.

1. From the Workarea's left frame, click the **Settings** folder.
2. Click the **Configuration** folder to expand the tree.
3. Click the **Metadata Definition** folder.
4. The View Site Metadata Definitions screen appears.
5. Select the language for the metadata you are about to define. This metadata is only available to content blocks in this language.
6. Click the Add Metadata button ( ).
7. The Add Metadata Definition screen appears. Using the following table, add the necessary information to create the metadata definition.

Metadata Definition Fields

Field	Description
Name	Enter a name to identify this metadata type.
Style	Select from the drop-down list to indicate whether you want the metadata style to be **name** or **http-equiv**.
Type	From the drop-down list, select whether this tag is HTML (`<title></title>`) or a Meta tag (`<meta>`) when inserted on the Web page.
Separator	Enter a character to separate the metadata values. The default is a semicolon (;).
Editable	Check this box if you want to allow the users to edit the contents of the metadata when creating or editing the metadata's content block. Uncheck this box if you want uniform metadata for each content block that uses this metadata.
Required	Check this box to require the user creating or editing this metadata's content block to enter metadata for it.
Remove Duplicates	Check this box to remove duplicate words/phrases in the metadata.
Case Sensitive	Check this box to remove duplicates only if the letters and case of each letter match.

Field	Description
Enabled Selectable Metadata	Check this box to force users to select from the metadata options specified in the **Allow Selectable Text** and **Default Text** fields. If you do not check this box, users can create their own metadata.
Allow Multiple Selections	Check this box to let users select multiple metadata values instead of just one. If multiple values are allowed, the separator character delimits them.
Allow Selectable Text	Enter standard metadata that can be selected by users. Separate each option by the separator specified for the metadata definition. If the **Enabled Selectable Metadata** box is checked, users must choose from the values you enter in this field and the **Default Text** field.
Default Text	Enter default content for the metadata tag. If **Enabled Selectable Metadata** is checked, this text appears in the selectable list on the Edit Metadata for Content screen.

8. Click the Save button ( ).

Viewing Metadata Definitions

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

1. Navigate to the Metadata Definitions screen in the administrator workarea, as described in ”Adding a Metadata Definition” on page 81.
2. Select a language from the drop-down list.
3. Click the metadata definition you want to view.
4. The View Metadata Definition screen is displayed. From here, you can edit and delete this metadata definition.

Editing a Metadata Definition

You can edit a metadata definition that is being used in your Ektron CMS400.NET Web site. To edit a metadata definition, follow these steps.

1. Access the View Metadata Definition screen for the metadata definition you want to edit, as described in ”Viewing Metadata Definitions” on page 82.

2. Click the Edit button ( ).
3. The Edit Metadata Definition screen is displayed.
4. Make the necessary changes to the metadata definition. See ”Metadata Definition Fields” on page 81.
5. Click the Update button ( ) to save the changes.

What Happens When a Metadata Definition is Edited?

After you edit a metadata definition, Ektron CMS400.NET reviews all content blocks and updates all affected metadata definitions. For example, 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>CMS400.NET Sample Web Site</Title>

to

<meta name=”Title” content=”CMS400.NET Sample Web Site”>

Deleting a Metadata Definitions

Metadata definitions that are no longer used can be easily removed from the Ektron CMS400.NET 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, follow these steps.

1. Access the View Metadata Definition screen for the metadata definition, as described in ”Viewing Metadata Definitions” on page 82.
2. Click the Delete button ( ).
3. A confirmation message is displayed.
4. Click **OK**.
5. Another confirmation message is displayed.
6. Click **OK**.

Inserting Metadata Via the Editor

Once metadata has been defined, users can assign it to a content block. To learn how to do this, refer to the Adding or Editing Metadata section of the **Ektron CMS400.NET** User Manual.

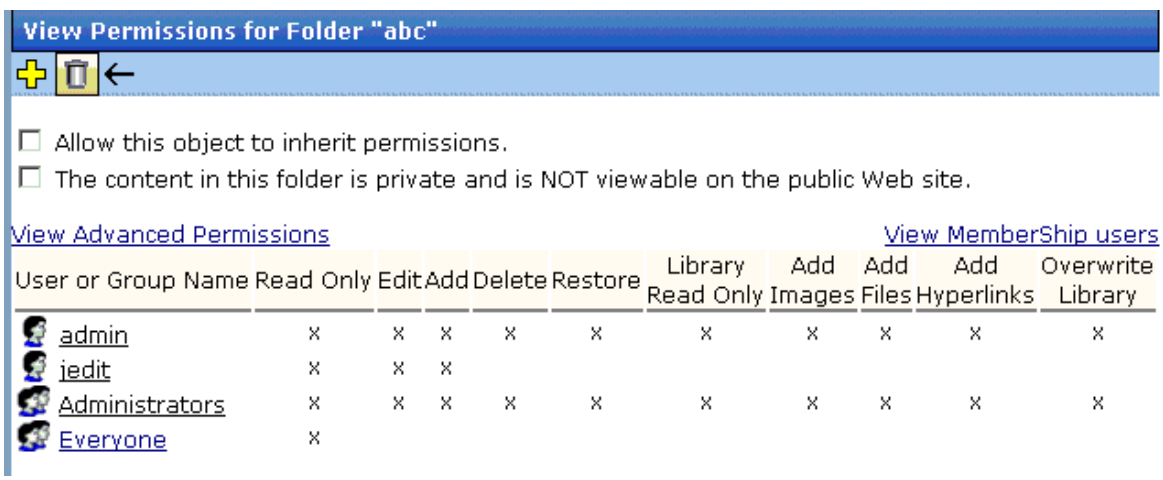
Setting Permissions

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 sub-folders unless you break inheritance for a sub-folder.

Only Ektron CMS400.NET administrators can set permissions.

You manage permissions through the Permission Table (illustrated below). It appears when you click the Permission button ( ) from the folder's or content block's Properties window.



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

- "Inheritance" on page 86

- ”Standard & Advanced Permissions” on page 87
- ”Setting Permissions for a Content Folder” on page 88
- ”Setting Permissions for a Content Block” on page 91

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 88
- 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 88.
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 88.
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 CMS400.NET.

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 Items" on page 101
	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 284
	Add Folders	Add sub folders
	Edit Folders	Edit folder properties *See Also:* "Folder Properties" on page 33
	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

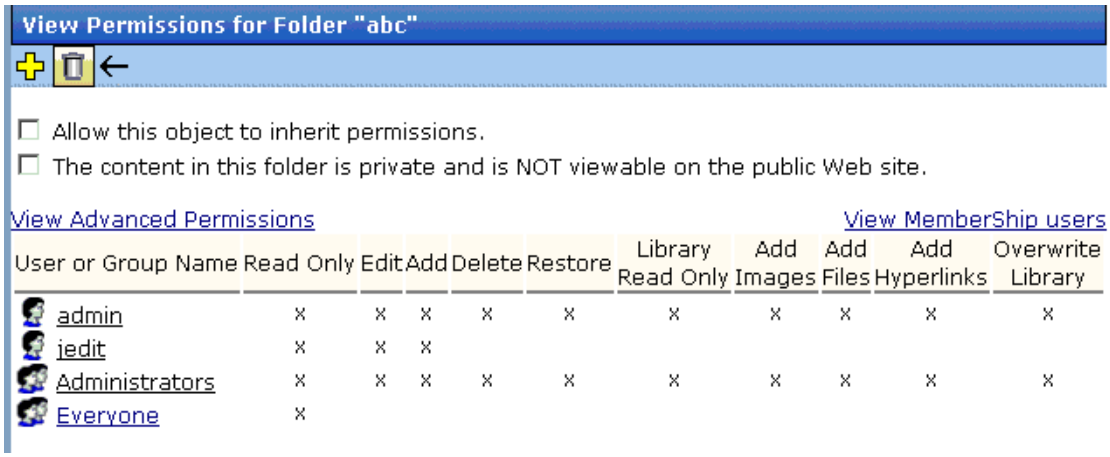
You can set permissions for any content folder and language from the Folder Properties screen. Here is the Permissions button on the Folder Properties screen.

Accessing the Permissions Table

To access the Permissions Table, follow these steps.

1. Select a folder from the left frame of the Workarea.
2. Select the language whose folder properties you want to update.
3. Click the Folder Properties button ( ).
4. The Folder Properties screen appears.
5. Click the Permissions button ( ).

6. The Permissions Table appears.



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 **View Advanced Permissions**	"Standard & Advanced Permissions" on page 87
Add user or group to permission table	Click	"Adding a User or User Group to the Permissions Table" on page 90
Remove user or group from permission table	Click	"Deleting Users or User Groups from the Permissions Table" on page 91
View membership users	Click **View MemberShip users**	"Private Content & Memberships" on page 131
Have this folder inherit permissions from parent folder	Check box next to **Allow this object to inherit permissions**	"Inheritance" on page 86
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 131

Adding a User or User Group to the Permissions Table

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

NOTE Before adding users or groups, you must break inheritance. See "Inheritance" on page 86.

NOTE 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.

NOTE You can only assign Read Only permission to a Membership user or user group.
See Also: "Private Content & Memberships" on page 131

1. Access the Permissions Table for the content folder or content block, as described in "Accessing the Permissions Table" on page 88.
2. Click the Add button ( ).
3. The Add Permissions screen 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 screen appears.
6. Check the standard and advanced permissions for the user or group. Refer to "Standard & Advanced Permissions" on page 87 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 ( ).

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.

1. Access the Permissions Table for the content folder or content block, as described in "Accessing the Permissions Table" on page 88.
2. Click the user or group for which you want to edit permissions.
3. The Edit Permissions screen appears.

4. To assign any permission, check the box. To remove any permission, uncheck the box.

NOTE Remember to toggle between standard and advanced permissions.

5. Click the Update button ( ).

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.

1. Access the Permissions Table for the content folder or content block, as described in "Accessing the Permissions Table" on page 88.
2. Click the Delete button ( ).
3. The Remove Permissions screen 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, selecting a language, and clicking on it.
2. Click the View Permissions ( ) 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 89.

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 CMS400.NET**, 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 85

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 as well as a language. *See Also:* ”Multi-Language Approval Chains” on page 335

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 94
- ”Inheritance and the Approval Chain” on page 94
- ”Creating an Approval Chain for a Content Folder” on page 94
- ”Editing an Approval Chain For a Content Block” on page 98

- "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 his 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 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, either modify the parent's approval chain or break inheritance. This procedure is described in "Inheritance" on page 86.

Creating an Approval Chain for a Content Folder

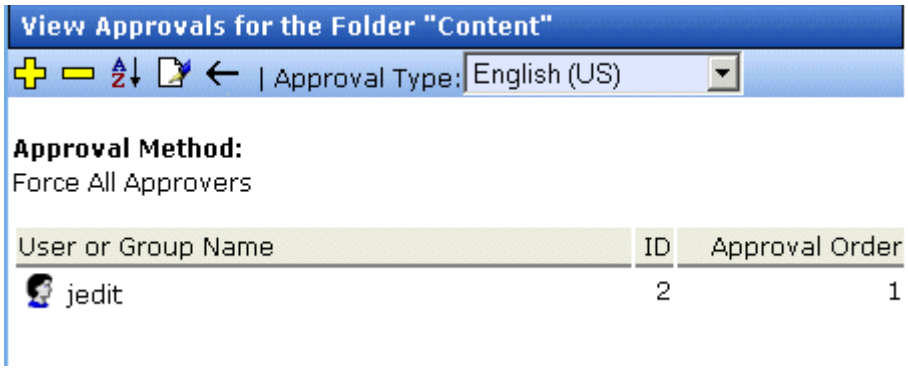
Before you can create an approval chain, you first have to view it.

Viewing a Folder's Approval Chain

To view a folder's approval chain, follow these steps.

1. Select a folder from the left frame of the Workarea.
2. Using the **View** field and languages drop-down list, select the language of the approval chain you want to view.
3. Click the Properties button ( ).
4. Click the Approvals button ( ).

5. The approval chain appears in the lower section of the screen.



This screen shows the following information about the approval chain.

- its language
- every user and user group in the approval chain
- the approval order
- the approval method (*See also:* "Changing the Approval Method" on page 100*)*
- toolbar buttons for modifying the approval chain and method

Actions You can Perform from the Approvals Screen

From this screen, you can perform these actions.

Action	Button	See this section for details
Add approvers		"Adding Approvers" on page 96
Remove approvers		"Deleting Approvers" on page 97
Change the order of users in the approval chain		"Editing the Approval Order" on page 96
Change the approval method		"Changing the Approval Method" on page 100

Action	Button	See this section for details
Change the language of the approval chain	**Approval Type** (language)	"Multi-Language Approval Chains" on page 335

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 94.
2. Select the language of the approval chain. The chain only applies to content blocks in this language.
3. Click the Add button ( ).
4. The Add Approvals screen 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 90 for more information.

5. Click the user or user group to add to the approval chain.
6. A confirmation message appears.
7. Click **OK**.

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.

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*).

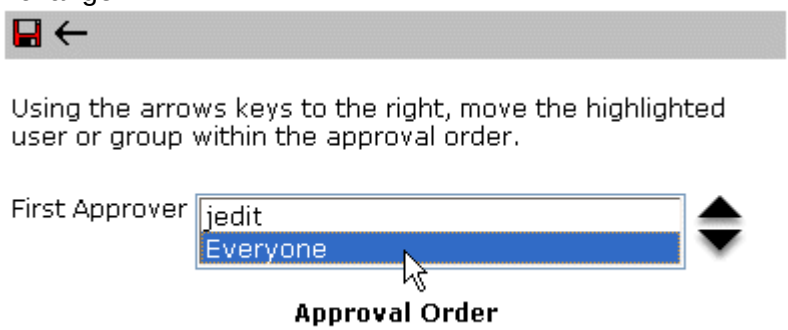
For example, if you have a content contributor whose edits must be approved by a department head, and the Webmaster has final review of all content, the approval order would look like this.

User or Group Name	Approval Order
Content contributor	1

User or Group Name	Approval Order
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 94.
2. Select the language.
3. Click the Reorder button ( ).
4. The Edit Approval Order screen appears.
5. Click the user or group whose approval order you want to change.



6. Click the Up ( ) or Down ( ) arrow to move the user or group to the desired order.
7. 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.

1. Access the approval table as described in "Viewing a Folder's Approval Chain" on page 94.

2. Select the language.
3. Click the Remove button ( ).
4. The Remove Approval screen appears.
5. Click the user or group that you want to remove from the approval chain.
6. A confirmation message appears.
7. Click **OK**.

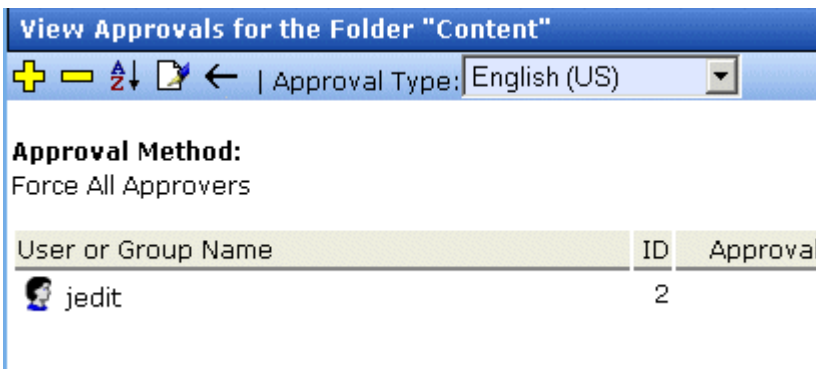
Editing an Approval Chain For a Content Block

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

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.
2. Click the View Permissions button ( ).
3. Uncheck the checkbox next to **Allow this object to inherit permissions**.
4. Return to the View Content screen.
5. Click the Approvals button ( ).
6. The content block's approvals table appears.



After viewing the block's approval chain, you can perform the same actions on it as you can perform on a folder. This list of actions is available from "Actions You can Perform from the Approvals Screen" on page 95.

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. The approval method only affects the approval process if the person submitting content for publishing is a member of the approval chain.

Two approval methods are available.

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 *after the user submitting content* in the approval chain must approve the content

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 94.
2. Click the Edit button ( ).
3. The Edit Approval Method screen appears.
4. Select an approval method by clicking the radio button.
5. Click the Save button ( ).

Managing Library Items

Before users can insert images and files into their content, they must be uploaded to the server that contains **Ektron CMS400.NET**. 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 101
- "Accessing The Library" on page 102
- "Folder Properties" on page 103
- "Performing Actions on Library Items" on page 105
- "Searching Library Items" on page 111
- "Load Balancing" on page 117
- "If You Have an Ektron WebImageFX License Key..." on page 120

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 a library item 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 Item to Your Content" on page 110.

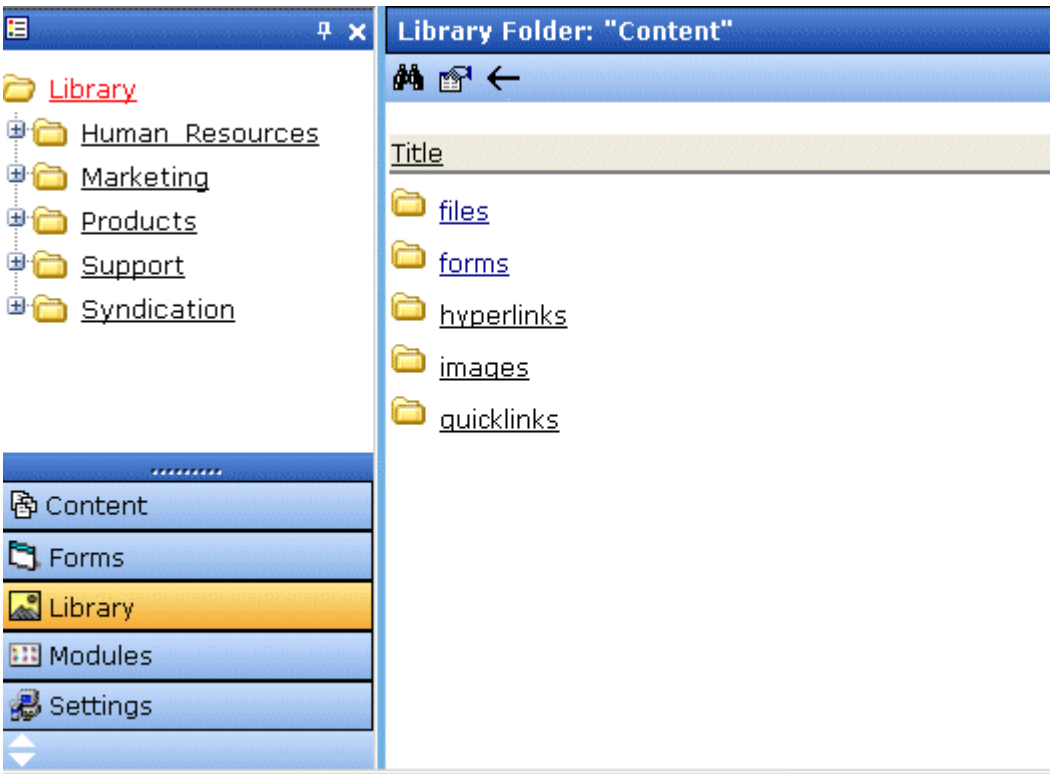
File Type	Description
Files	External files (such as a Microsoft Word document) that can be inserted into Web content
Forms	A quicklink to a form content block. (See Quicklinks below)
Hyperlinks	A text string linked to a URL. For example, the text string is **Ektron, Inc.**, and the URL is `www.ektron.com`.
Images	Images that can be inserted into Web content
Quicklinks	A internal URL to a content block in your Web site. It consists of: • a content folder • a template • a content block id For example: `/cms400Example/sales.aspx?id=5`

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.



To learn about the file types in the right frame, see "Types of Library Files" on page 102.

- 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 103.
- The search button ( ) lets you search for library items. For more information, see "Searching Library Items" on page 111.

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 Screen

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

1. Access a library folder, as explained in "Accessing The Library" on page 102.
2. Click the Properties button ( ).
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	Specifies where the uploaded images are saved on the Web server. By default, the image upload directory is `Web root/ek_sitepath/uploadedimages`. The `ek_sitepath` value is set in the Web.config file. Note: You must create the directory in your Web root manually, before adding it in CMS400.NET. *See Also:* **Ektron CMS400.NET** Setup Manual section "Managing the web.config File."
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.

Field	Description
File Upload Path	Specifies where the uploaded files are saved on the Web server. By default, the file upload directory is `Web root/ek_sitepath/uploadedfiles`. The `ek_sitepath` value is set in the Web.config file. Note: You must create the directory in your Web root manually, before adding it in CMS400.NET. *See Also:* **Ektron CMS400.NET** Setup Manual section "Managing the web.config File."
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 Screen" on page 104.
2. Click the Edit button ( ).
3. The Library Management screen is displayed. To learn about the field, see "The Library Management Settings" on page 104.
4. Click the Update button ( ) to save the settings.

Performing Actions on Library Items

The library is made up of images, files, form quicklinks, hyperlinks, and regular quicklinks that were added by Ektron CMS400.NET

users. The following table displays the actions that can be performed for each library item type.

Action	Files	Images	Hyperlinks	Quicklinks	Form quicklinks
Add	✓	✓	✓	✓	✓
Edit	✓	✓	✓	✓	✓
View	✓	✓	✓	✓	✓
Overwrite	✓	✓			
Delete	✓	✓	✓	✓	✓
Remove from server	✓	✓			
Check links	✓	✓	✓	✓	✓
Update URL			✓	✓	✓

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

Uploading and Adding Library Items

To add a library item to the Ektron CMS400.NET Web site, follow these steps.

1. In the 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 item to a specific folder, only users with permissions to that folder can use that item in their content blocks.

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

2. Click the folder for the type of item you want to add.

3. The contents of the selected folder are displayed.
4. Click the Add Library Item button ( ).
5. The Add Library Item screen appears.
6. Enter the necessary information for the item you want to add.
7. Click the Save button ( ).

Viewing Library Items

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

1. Navigate to the library folder that contains the item 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 item you want to view.
4. The contents of the selected folder are displayed.
5. Click the **title** of the item you want to view.
6. The View Library Item screen appears.

Editing Library Items

If desired, you may edit any library item. To edit a library item, follow these steps.

1. Access the View Library Item screen for the item you want to edit as described in ”Viewing Library Items” on page 107.
2. Click the Edit button ( ) to edit the library item.
3. The Edit Library Item screen is displayed.
4. Make the necessary changes to the library item.
5. Click the Update button ( ).

Library Link Checking

Link checking indicates all content blocks that include a library link. It is useful when you want to delete a library item. With the click of

a button, you see all content blocks that you need to update to reflect the change you are making.

Performing a Library Item Link Check

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

1. Access the View Library Item for any type of library item, as described in "Viewing Library Items" on page 107.
2. Click the Check Links button ( ).
3. A list of all content blocks that reference the library item is displayed.

You should edit those content blocks before deleting the item.

Overwriting Images and Files

NOTE Overwriting can only be performed on images or files.

When an image or file in the Ektron CMS400.NET 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 FIles

To overwrite an image or file, follow these steps.

1. Access the View Library Item screen for the item you want to overwrite, as described in "Viewing Library Items" on page 107.
2. Click the Overwrite button ( ).
3. The Overwrite Library Item screen 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 screen 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 Items

You can delete obsolete items from the library. By deleting an item, 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 item is a file or image, the delete window displays an additional prompt, **Remove from the server,** that lets you remove the item 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 107

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

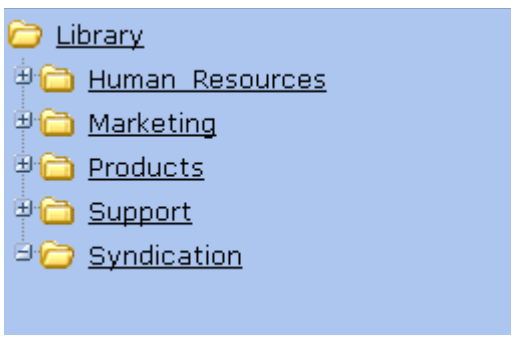
1. Access the View Library Item screen for the item you want to delete, as described in "Viewing Library Items" on page 107.
2. Click the Delete button ( ).
3. The Delete Library Item screen is displayed.

4. If appropriate, check the box next to **Remove from the server** (see above).
5. Click the Delete button ( ).

Adding a Library Item to Your Content

Once a library item is added to the Ektron CMS400.NET library, users can add it to a content block. To add a library item to a content block, follow these steps.

1. Invoke the editor by adding or editing a content block in Ektron CMS400.NET.
2. Click the Library 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 item you want to insert.



5. In the right frame, click the sub-folder for the type of item you want to insert.
6. The contents of the folder are displayed.

NOTE If the item 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 item to be inserted.
8. The selected item is highlighted.
9. Click the Insert button ( ) in the editor library window.
10. The library window closes, and the item 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 CMS400.NET, 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, follow these steps.

1. in the Library, access the quicklinks folder containing quicklinks you want to update.
2. Click the Update Quicklinks button ( ).
3. The Update URL Link Template Quicklinks screen 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.
6. 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 Items

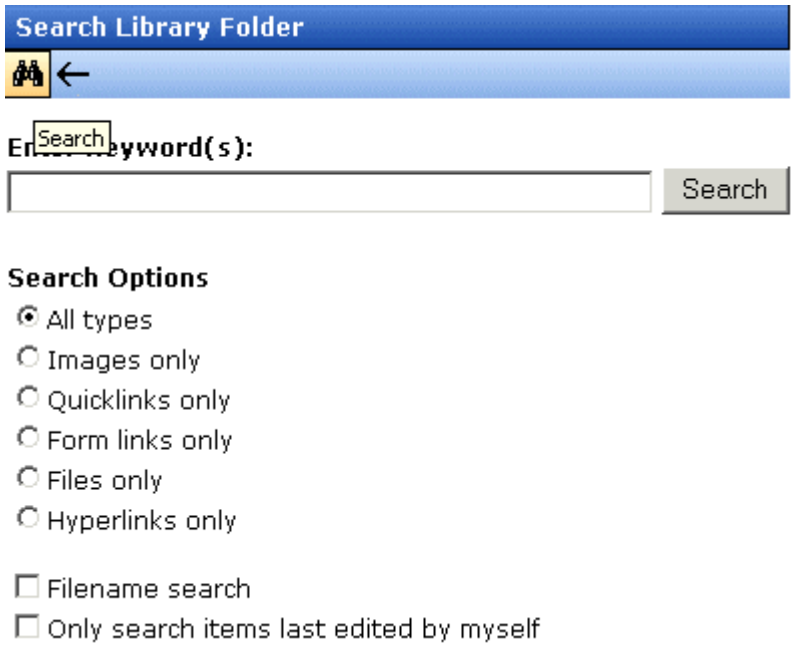
To find library items within your Web site, you can execute an internal library search using the library folder in the workarea or though the eWebEditPro editor library.

Searching via Library folder

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

1. Access any library folder in the Workarea, as described in "Accessing The Library" on page 102.

2. Click the Search button ( ).
3. The Search Library Folder screen is displayed.



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 includes all library item types.
Images only	The search only searches images.
Quicklinks Only	The search only searches quicklinks.
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 item 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).

Field	Description
Only search items last edited by myself	The search only finds library items 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 screen.

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

Searching Library Items via eWebEditPro Library

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

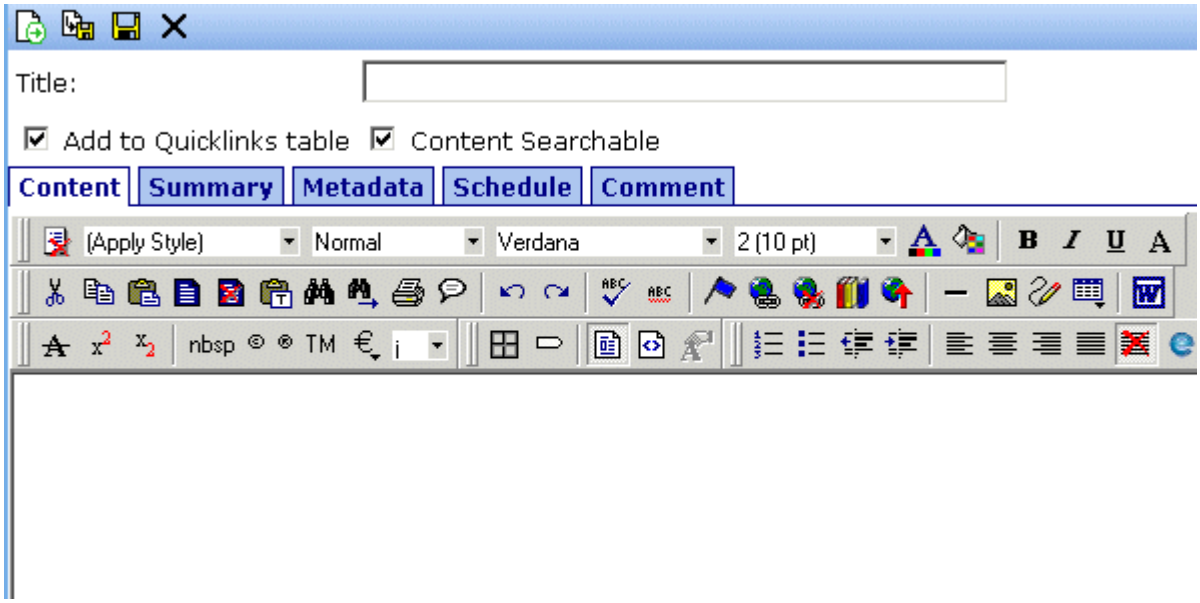
1. In your Workarea, browse to the content block under which you want to do a search on library items.

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

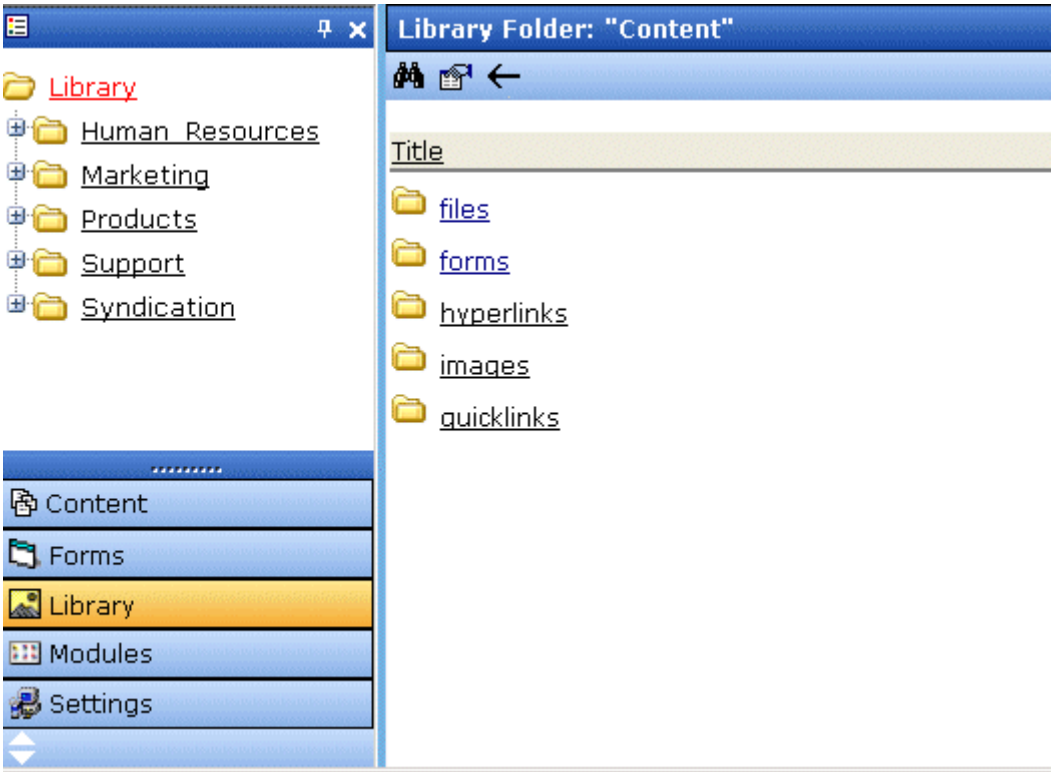
NOTE When selecting a content block to search, keep in mind the permissions that are set on it, and which users have permissions to view the library.

2. Click the Add Content button ( ).

3. The Add Content window opens.

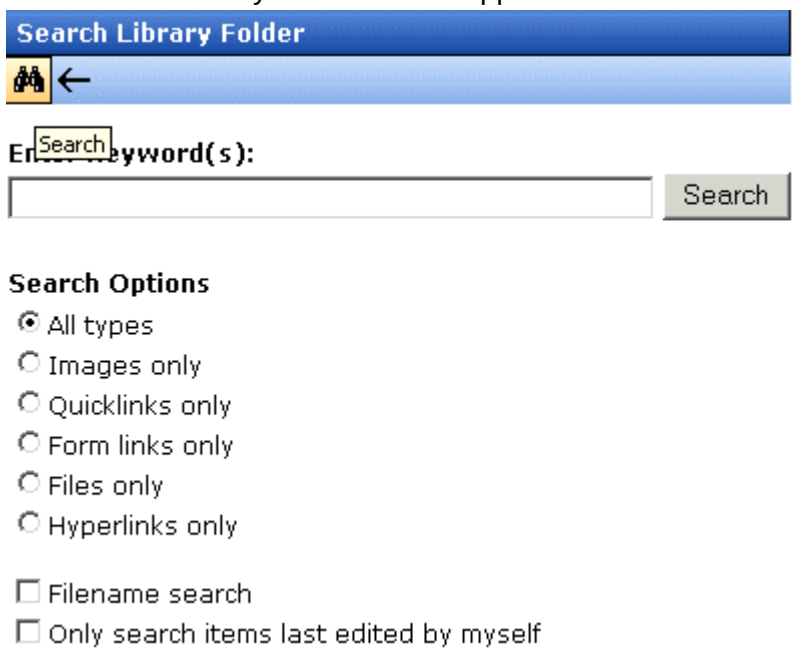


4. Click the library toolbar button from the editor toolbar.
5. The Library window appears.



6. Click the Search button ( ).

7. The Search Library Folder screen appears.



8. 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 item 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 item 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 items that were last modified by you.

9. 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 screen.

10. 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 CMS400.NET. For further information about the steps needed to set up load balancing outside of Ektron CMS400.NET, see ”Load Balancing” on page 395.

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 CMS400.NET

Ektron CMS400.NET does not need to be aware that load balancing is taking place. However, the library items on all servers must be identical. Therefore, when a user uploads a new item to the Ektron CMS400.NET library, it must be replicated on all other servers in your load balancing model. To achieve this, Ektron CMS400.NET uploads the items to default upload directory and any other folder defined in the library.

Ektron CMS400.NET provides to any 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 CMS400.NET Web site. In most cases, this is a virtual folder that points to a mounted hard drive (another server).

NOTE Refer to "Load Balancing" on page 395 for advanced information about this feature.

Accessing Library Load Balancing Screen

To access the load balancing section in the library, follow these steps.

1. Click the **Library** folder button.
2. Click the View Properties button ( ).
3. Click the View Load Balance Settings button ( ).
4. The View Library Load Balance Settings screen is displayed.

   The screen's columns are described in the following table.

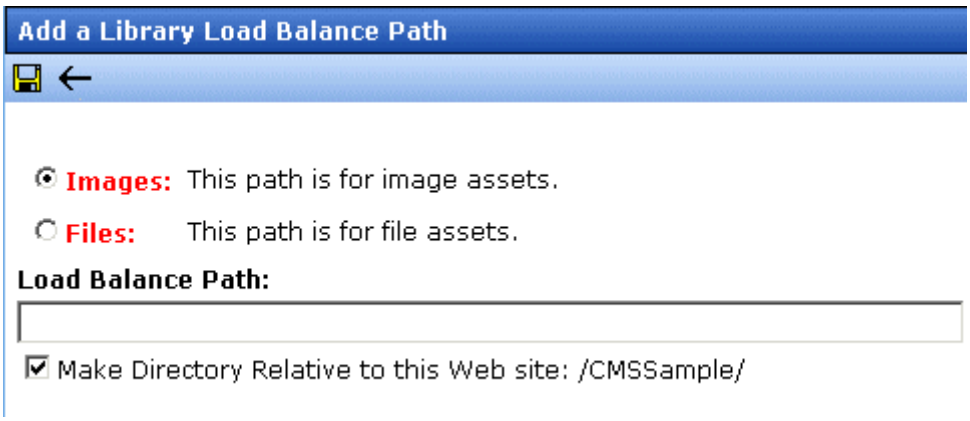
Column Title	Description
Web Path	The path of the folder under your server's Web site.
Type	• Images - load balance folder for uploaded images. • Files - load balance folder for uploaded files.
Relative	An **x** indicates if the folder is relative to your Ektron CMS400.NET Web site.
Verified	If the load 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	The physical location of the folder to which items will be uploaded.

Adding a New Load Balancing Folder

To add a new load balancing folder in the Ektron CMS400.NET library, follow these steps.

1. Access the view load balance settings screen, as described in "Accessing Library Load Balancing Screen" on page 118.

2. Click the Add button ( ) on View Library Load Balance Settings screen.
3. The Add a Library Load Balancing Path screen is displayed.



4. Use the following table to help you complete 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 CMS400.NET 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.

5. Click the Save button ( ).

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, follow these steps.

1. Access the View Library Load Balance Settings screen as described in "Accessing Library Load Balancing Screen" on page 118.
2. 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 ( ).

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, follow these steps.

1. Access the View Library Load Balance Settings screen, as described in "Accessing Library Load Balancing Screen" on page 118.
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.
5. Click the Remove button ( ) to delete the load balance path.

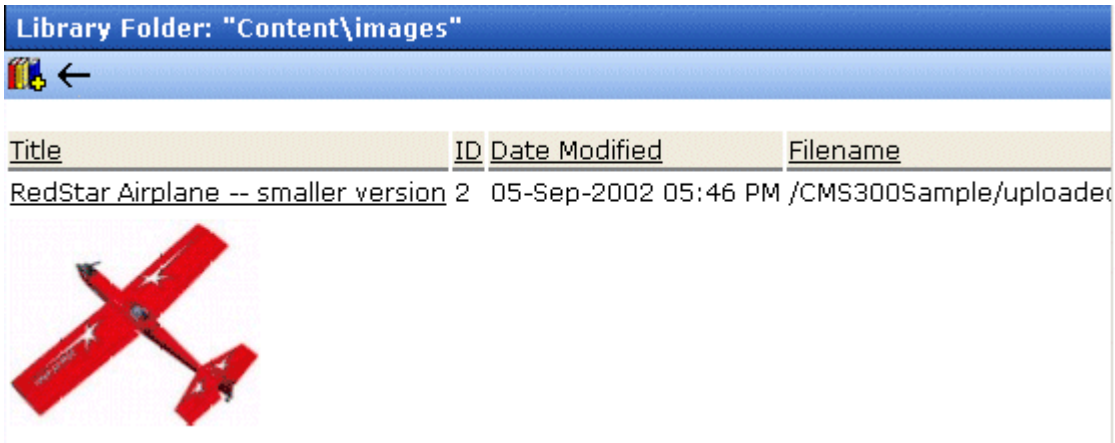
   A confirmation message is displayed.
6. Click **OK.**

If You Have an Ektron WebImageFX License Key...

If you have also purchased and inserted an Ektron WebImageFX license key into Ektron CMS400.NET, 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.

Here is an example of the images folder for an Ektron CMS400.NET Web site with an Ektron WebImageFX license key.



NOTE For information about acquiring an Ektron WebImageFX license key for Ektron CMS400.NET, 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 CMS400.NET, you can add, edit, and delete users to and from the application through the Settings folder in Administrator Workarea.

Every Ektron CMS400.NET 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 445 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 CMS400.NET 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 122
- "Creating A New User" on page 123
- "Viewing A User" on page 125
- "Assigning Users To User Groups" on page 128

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 CMS400.NET, 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 CMS400.NET users is displayed.

From this screen, 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 CMS400.NET, 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 list of all user groups is displayed.

From this screen, 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 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 123.
2. Click the Add User button ( ).
3. The Add a New User to the System screen 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 CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within **Ektron CMS400.NET**. The dropdown list of choices at this field is derived from the Language Settings screen, available from the **Settings> Configuration** folder. Do not confuse the system language with the user’s ability to create and edit foreign editions of content blocks. This field does not prevent a user from working with multiple language content blocks. *See Also:* ”Multi-Language Support” on page 311 Note: If the selected language is not English, French or German, it is only supported after you download the **Ektron CMS400.NET** Language Support Program from Ektron and translate the Web site.
E-mail Address	Enter the e-mail address of the user.

Field	Description
Disable E-mail Notification	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 430. However, this field has no effect on the user's ability to receive instant email.
Work Page Size	See "Work Page Size" on page 23
Landing Page after login	See "Landing Page after login" on page 24
• User name • Create Task • Redirect Task • Delete Task	See "Task Permissions" on page 271

NOTE If email notification is turned off in the setup page, you are notified when editing, adding, or viewing a user.

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 128.

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

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 123.
2. Click the **Username** of the user you want to view.
3. The View User Information screen is displayed.

From the View User screen, 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 screen of the user you want to edit as described in ”Viewing A User” on page 125.
2. Click the **Username** of the user you want to edit.
3. The View User Information screen is displayed.
4. Click the Edit button ( ).
5. The Edit User screen is displayed.
6. Make the necessary changes to the user information.
7. Click the Update button ( ).

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.

WARNING! Once a user is deleted from the database, he is deleted permanently. The process cannot be undone.

To delete a user, follow these steps.

1. Access the view user screen for the user you want to delete, as described in ”Viewing A User” on page 125.
2. Click the **Username** of the user you want to delete.
3. The View User Information screen is displayed.
4. Click the Delete button ( ).

5. A confirmation message is displayed.
6. Click **OK**.

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 CMS400.NET. Also, you cannot remove users from the Everyone or Admin user groups.

To remove a user from a user group, follow these steps.

1. Access the User Groups folder, as described in "Accessing the User Group Folder" on page 123.
2. Click the User Group that includes the user you want to remove.
3. Members of the selected group appear.
4. Click the user to remove.
5. The View User Information screen is displayed.
6. Click the Delete button ( ) to delete the user from the group.
7. A confirmation message is displayed.
8. Click **OK**.

Managing User Groups

Creating A New User Group

To create a new User Group in Ektron CMS400.NET, follow these steps.

1. Access the User Groups folder in the administrator Workarea, as described in "Accessing the User Group Folder" on page 123.
2. Click the Add User Group button ( ).
3. The Add a New User Group to the System screen is displayed.

4. Enter a name and brief description of the user group you want to create.
5. Click the Save button ( ).

Assigning Users To User Groups

To add a user to a user group, follow these steps.

1. Access the User Groups folder in the administrator Workarea.
2. Click the user group to which you want to add a user.
3. The View Users in Group screen appears with all users who currently belong to the group.

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

4. Click the Add User button ( ).
5. Users who do not belong to the group appear.
6. Click the user you want to add.
7. A confirmation message is displayed.
8. Click **OK**.
9. The selected user is now a member of the selected group.
10. Continue this process until you add all users into User Groups.

Viewing the Users in a User Group

To view a list of users who are members of a user group, follow these steps.

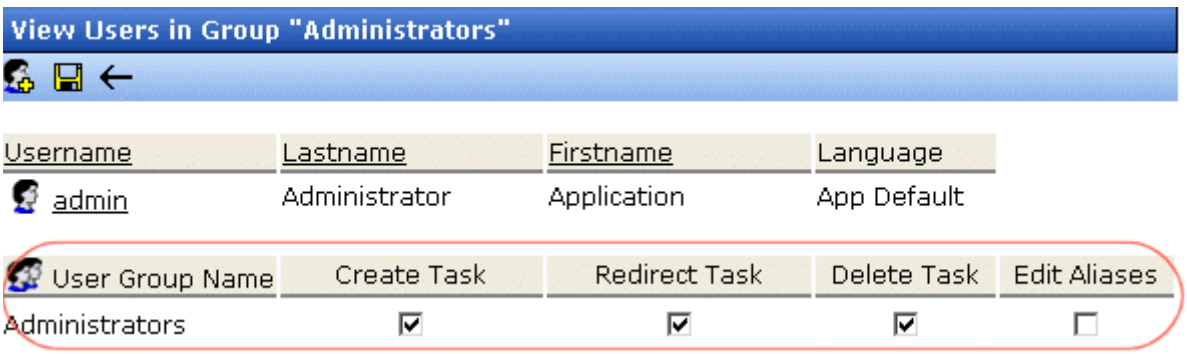
1. Access the User Group folder in the administrator Workarea, as described in "Accessing the User Group Folder" on page 123.
2. Click the user group whose members you want to view.
3. The View Users in Group screen appears with a list of users who are members of the group.

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

You can also assign to the group members task permissions and the ability to edit aliases by checking the boxes illustrated below.

For more information about editing aliases, see "Permissions for Manual Aliasing" on page 424.

To learn about the task fields in the lower section of the screen, see "Task Permissions" on page 271.



Editing A User Group

When editing a User Group, you can only change its name.

NOTE You cannot edit the default Administrators and Everyone user groups.

To edit a user group, follow these steps.

1. Access the View Users in Group screen for the user group you want to edit, as described in "Viewing the Users in a User Group" on page 128.
2. Click the User Group you want to edit.
3. The View Users In Group screen is displayed.
4. Click the Edit button ( ).
5. The Edit User Group screen is displayed.
6. Make the necessary changes.
7. Click the Update button ( ).

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, follow these steps.

1. Access the View Users in Group screen for the user group you want to delete, as described in "Viewing the Users in a User Group" on page 128.
2. Click the User Group you want to delete.
3. The View Users In Group screen is displayed.
4. Click the Delete button ( ).
5. A confirmation message is displayed.
6. Click **OK**.
7. The User Group is deleted from the Ektron CMS400.NET Web site.

Removing Users from User Groups

See "Removing Users from User Groups" on page 127.

Private Content & Memberships

Private Content

Private content is content that is stored in **Ektron CMS400.NET** folders that are specially designated as private.

Private content is only viewable by users who are logged in to the Ektron CMS400.NET 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.

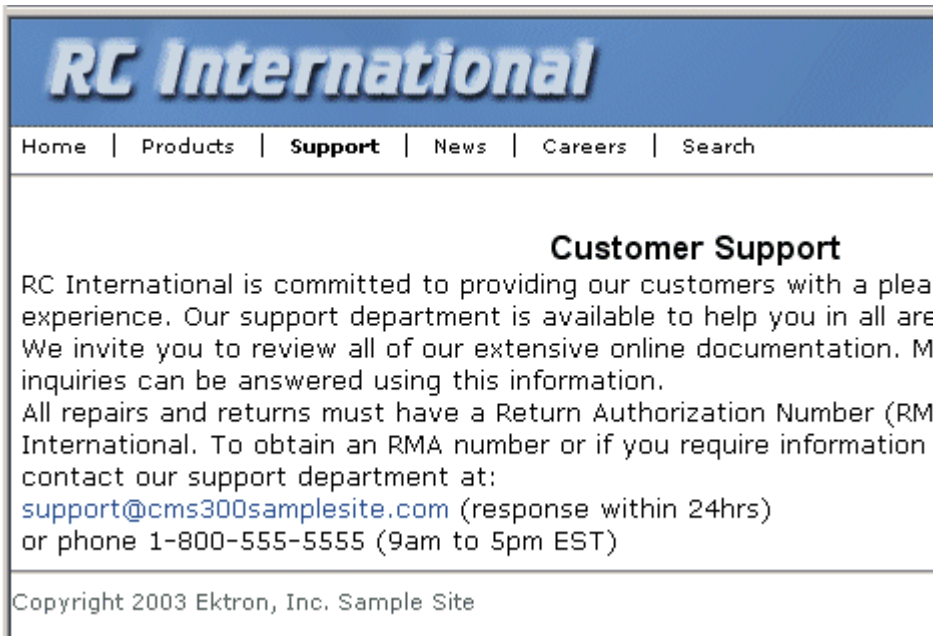
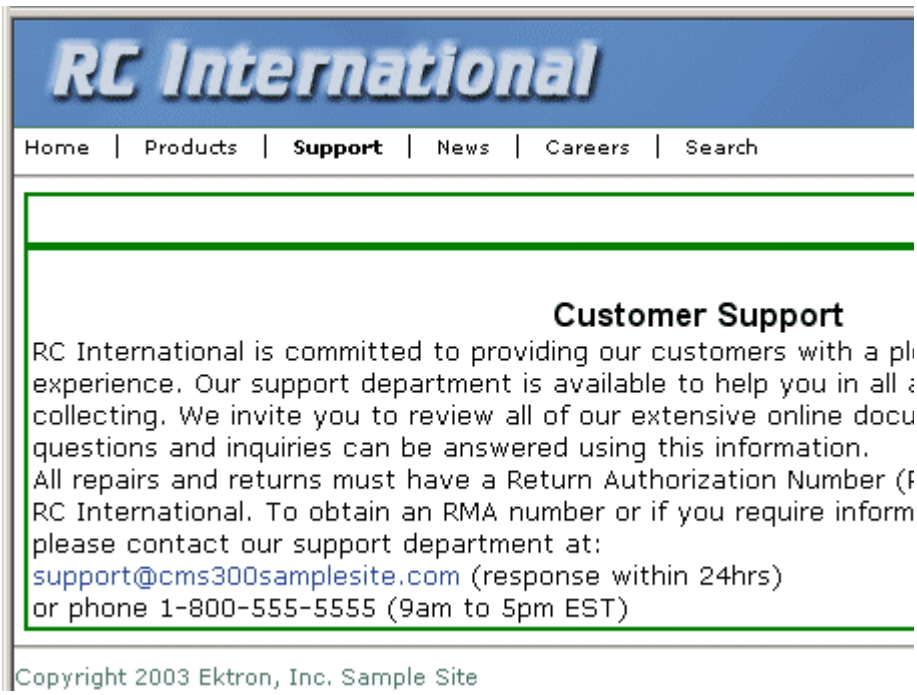
To set a content folder to be private, follow these steps.

1. Access the permissions table for a content folder or content block in your Workarea, as described in "Setting Permissions" on page 85.
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.	

Scenario	Web Page Display
Logged in user with read-only permissions accessing a content block in a private content folder.	
Logged in user with more than read-only permissions accessing a content block in a private content folder.	

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 log in. When a membership user logs into Ektron CMS400.NET, he can only view content -- all regular functionality is disabled.

By default, a membership user can view all public content on the Ektron CMS400.NET 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 such a content block or folder, he can only view the content if he is logged in to the Ektron CMS400.NET Web site.

Membership user groups are used to group similar membership users. *See Also:* ”Private Content” on page 131

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 CMS400.NET-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 CMS400.NET 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, follow these 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 135
User Groups	"Membership User Groups" on page 137

Membership Users

The following sections explain all actions that may be performed on membership users via the following topics.

- "Adding Membership Users" on page 135
- "Viewing Membership User Information" on page 136
- "Editing Membership Users" on page 136
- "Deleting Membership Users" on page 137
- "Membership User Groups" on page 137

Adding Membership Users

To add a new membership user, follow these steps.

1. Access the membership users folder in your administrator workarea, as described in "Accessing the Membership Module Folder" on page 134.
2. Click the Add Membership User button ( ).
3. The Add Membership User screen is displayed.
4. 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.

Field	Description
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.

5. Click the Save button ( ).

Adding Membership Users to a Membership User Group

See "Adding Membership Users to a Membership User Group" on page 139.

Setting Permissions on Private Content for Membership Users

See "Assigning Permissions for Memberships" on page 140.

Viewing Membership User Information

To view the information of a membership user, follow these steps.

1. Access the membership users folder in your administrator workarea, as described in "Accessing the Membership Module Folder" on page 134.
2. Click the username of the user you want to view.
3. The View Membership User Information screen is displayed.

From this screen, you can edit or delete membership users.

Editing Membership Users

To edit an existing membership user, follow these steps.

1. Access the View Membership User screen of the membership user you want to edit, as described in "Viewing Membership User Information" on page 136.
2. Click the Edit button ( ).
3. The Edit Membership User Information screen is displayed.

4. 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.

5. Click the Update button ( ).

Deleting Membership Users

To delete a membership user from the Ektron CMS400.NET Web site, follow these steps.

1. Access the View Membership User screen of the membership user you want to edit, as described in "Viewing Membership User Information" on page 136.
2. Click the Delete button ( ).
3. A confirmation message is displayed.
4. Click **OK**.

Membership User Groups

Membership user groups organize similar membership users, reducing the effort required to assign identical permissions to many users. The following section explains membership user group management via the following topics.

- "Adding Membership User Groups" on page 138

- ”Viewing Membership Users in a Membership User Group” on page 138
- ”Adding Membership Users to a Membership User Group” on page 139
- ”Setting Permissions on Private Content for Membership User Groups” on page 139
- ”Editing Membership User Groups” on page 139
- ”Deleting Membership User from Membership User Group” on page 140
- ”Deleting Membership User Groups” on page 140

Adding Membership User Groups

To create a new membership user group, follow these steps.

1. Access the membership user group folder in your administrator workarea, as described in ”Accessing the Membership Module Folder” on page 134.
2. Click the Add Membership User Group button ( ).
3. The Add a New User Group screen is displayed.
4. Complete the form using the following table as a reference.

Field	Description
User Group Name	Enter a unique name for the membership user group.

5. Click the Save button ( ).

Viewing Membership Users in a Membership User Group

To view the information about an existing membership user group, follow these steps.

1. Access the membership user group folder in your administrator workarea, as described in ”Accessing the Membership Module Folder” on page 134.
2. Click the user group name of the membership user group you want to view.

3. The View Users In Group screen is displayed.

Adding Membership Users to a Membership User Group

To add a membership user to a membership user group, follow these steps.

NOTE Only membership users can be added to membership user groups.

1. Access the View Membership User Group screen for the membership user group to which you want to add a membership user, as described in "Viewing Membership Users in a Membership User Group" on page 138.
2. Click the Add Membership User button ( ).
3. The Add User to Group screen is displayed.

NOTE Only membership users who do not belong to the group appear.

4. Click the username of the user you want to add to the membership user group.
5. A confirmation message is displayed.
6. Click **OK**.

Setting Permissions on Private Content for Membership User Groups

See "Assigning Permissions for Memberships" on page 140

Editing Membership User Groups

To edit an existing membership user group, follow these 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 138.
2. Click the Edit button ( ).
3. The Edit User Group screen is displayed.
4. Make the necessary changes to the membership user group name.

5. Click the Update button ( ).

Deleting Membership User from Membership User Group

To remove a membership user from a membership user group, follow these steps.

1. Access the View Membership User Group screen 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 138.
2. Click the username of the membership user you want to remove.
3. The View User Information screen is displayed.
4. Click the Delete button ( ).
5. A confirmation message is displayed.
6. Click **OK**.

Deleting Membership User Groups

To delete a membership user group, follow these steps.

1. Access the View Membership User Group screen for the membership user group you want to delete, as described in ”Viewing Membership Users in a Membership User Group” on page 138.
2. Click the Delete button ( ).
3. A confirmation message is displayed.
4. Click **OK**.

Assigning Permissions for Memberships

After you create membership users and/or user groups, you can assign them permissions to the content folders of your choice. To assign permissions to a membership user or user group to a content folder, or content block, follow these steps.

1. Access the permissions table for the content block or content folder you want to assign membership permissions for.

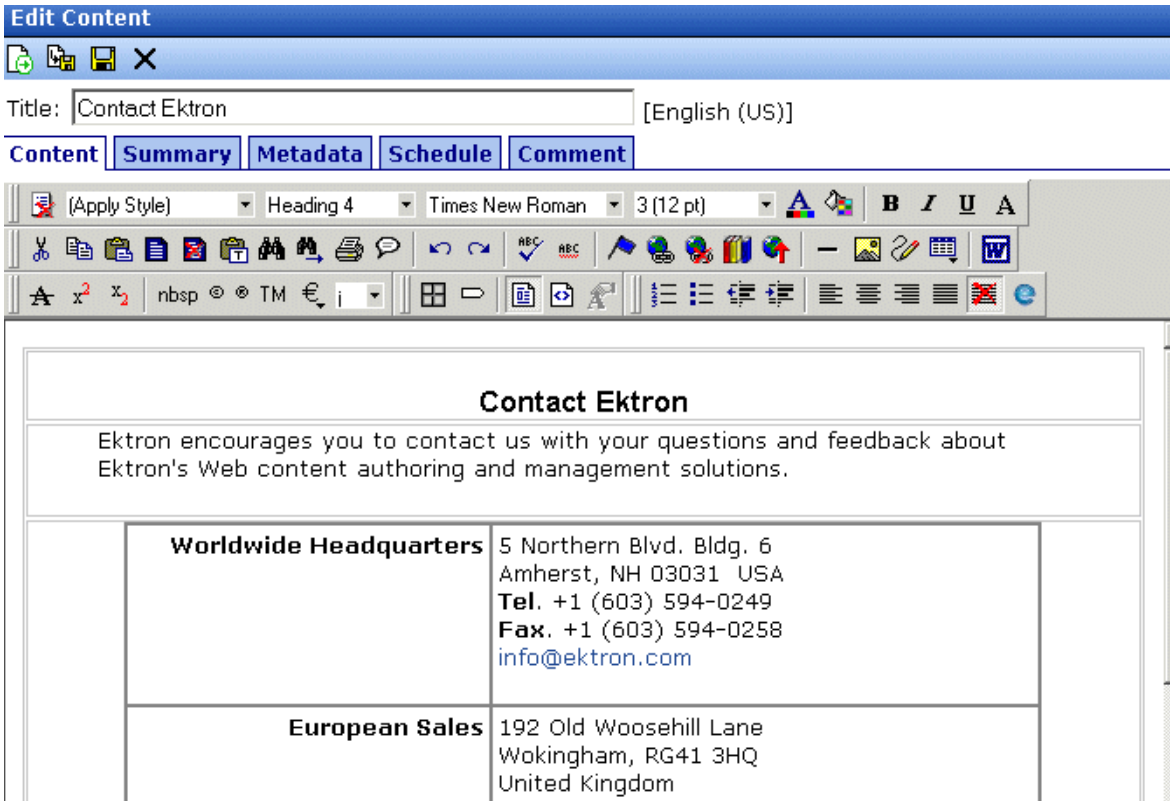
For ...	See...
Content folders	"Setting Permissions for a Content Folder" on page 88
Content blocks	"Setting Permissions for a Content Block" on page 91

2. If necessary, break the inheritance for the content block or folder. *See Also:* "Inheritance" on page 86
3. Set the content folder or content block to be **Private** content. *See Also:* "Private Content" on page 131
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 screen is displayed.
8. Click a username or user group name to add to the permissions table.
9. The Add Permissions Options screen is displayed.
10. Check **Read-only** if you want the membership user or user group to be able to view the private content when logged in.
11. Click the Save button ( ).

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

Using eWebEditPro

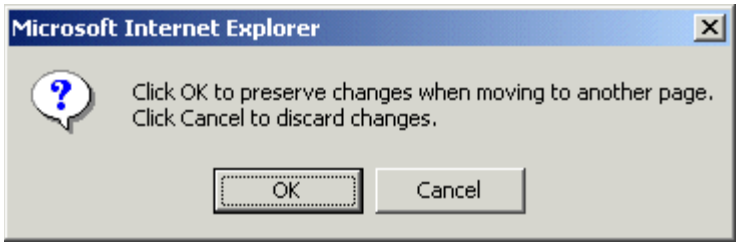
This is the editor supplied with Ektron CMS400.NET, eWebEditPro+XML.



For more information about using the editor, please refer to the Ektron CMS400.NET User Manual.

Prompting the User to Save Upon Closing Browser

If a user is editing content and closes the editor's browser window, by default, the window closes and any unsaved changes are lost. You can change this behavior such that if a user closes a window, the following message appears.



As you can see, the user has the option to save changes or exit without saving. To enable the above message, follow these steps.

1. Open the web.config file, located in your Web site's `root` folder.
2. Change the value of `eWebEditProPromptOnUnload` to **1**.
3. Save web.config.

Managing XML

Ektron CMS400.NET 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 CMS400.NET can serve content to various presentation devices (e.g., PDAs, mobile phones, WebTV), saving users from the tedium of creating duplicate content. Review and revision are drastically reduced because the accuracy and format of your Web content is managed using XML schema validation.

Using XML with Ektron CMS400.NET provides 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 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 CMS400.NET to define the necessary files to display, save, and validate the content properly.

This section explains how to take advantage of Ektron CMS400.NET's XML capabilities.

What's in This Chapter?

Here is what's covered in this chapter.

- "Adding a New XML Configuration" on page 147

- ”Assigning XML Configurations” on page 152
- ”Viewing XML Configurations” on page 154
- ”Editing XML Configurations” on page 160
- ”Editing Data Design Package” on page 158
- ”Creating XML Configurations Based on Existing Configurations” on page 161
- ”Viewing Data Designer XSLTs” on page 162
- ”Deleting XML Configurations” on page 163
- ”XML Indexing” on page 165

Before You Manage XML Configurations

Use the XML configuration section to define each XML configuration that will be used in your Web site. Each configuration is assigned to a content folder or a content block and lets you specify how XML content appears in the editor, is validated, and is displayed in an output device.

There are two ways to create an XML configuration.

- Using external XML files
- Using the WYSIWYG Data Designer

This section explains how to create and manage XML configurations using both methods.

The XML Configuration Toolbar

During the process of creating and managing XML configurations, several toolbar buttons are available. The following table describes the buttons and their actions.

Button	Name	Description	More Information
	Add XML Configuration	Create a new XML configuration or create a new XML configuration based on the properties of an existing one.	”Adding a New XML Configuration” on page 147

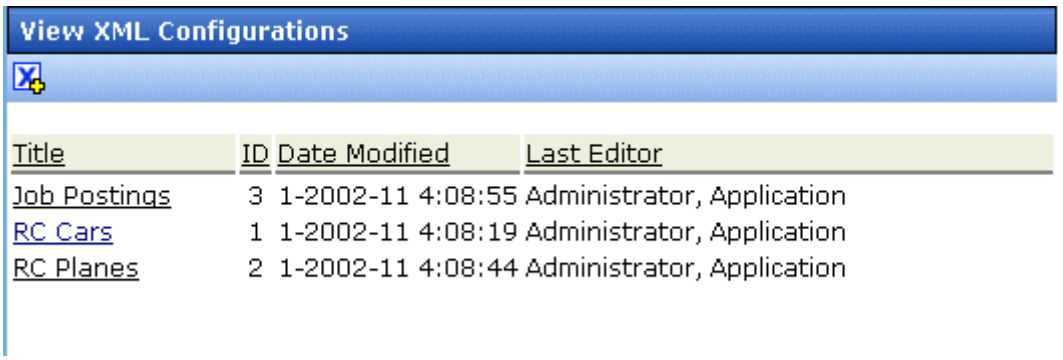
Button	Name	Description	More Information
	Back	Return to previous screen	
	Configure Full Text Search	Edit search screen labels	”Editing the Search Labels” on page 225
	Delete	Delete an XML configuration	”Deleting XML Configurations” on page 163
	Edit	Edit an XML configuration	”Editing XML Configurations” on page 160
	Edit Data Design	Open the Data Designer	”Editing Data Design Package” on page 158
	Save	Save changes	
	Update	Save and update changes	
	View XSLT	Display the XSLT for an XML configuration	”Viewing Data Designer XSLTs” on page 162

Accessing XML Configurations

To access the XML configuration section of the Workarea, follow these steps.

1. Access your workarea, as described in ”Accessing the Workarea” on page 7.
2. In the folder tree on the left side of the workarea, follow the path **Settings > Configuration > XML Configuration**.

3. The View XML Configurations screen is displayed.



From here, you can view, add, edit, and delete XML configurations.

Adding a New XML Configuration

When adding a new XML configuration, you have two options.

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

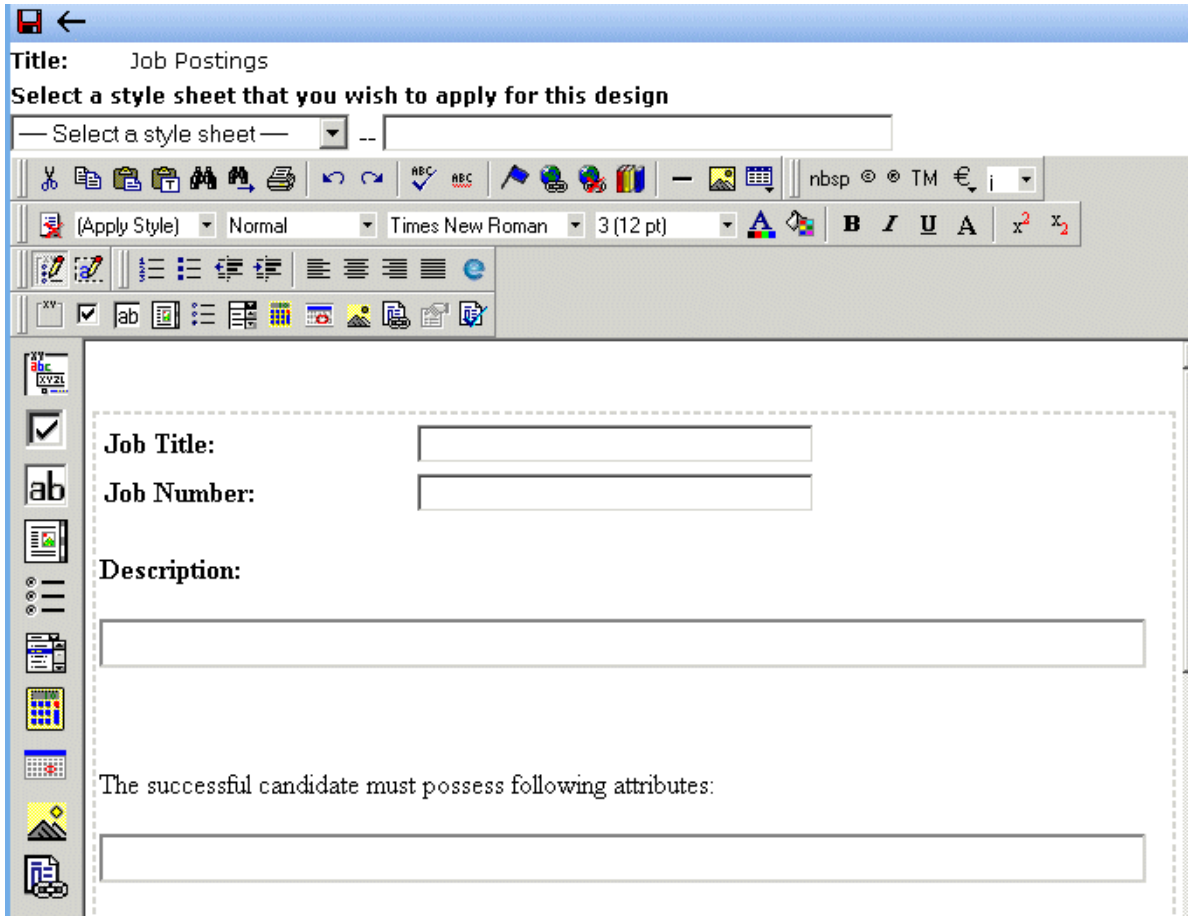
The following sections explain both methods.

Adding XML Configurations Using the Data Designer

To add an XML configuration using the WYSIWYG Data Designer, follow these steps.

1. Access the XML Configurations screen, as described in "Accessing XML Configurations" on page 146.
2. Click the Add XML Configuration button ( ).
3. The Add XML Configuration screen is displayed.
4. Enter a **Title** for the XML configuration.
5. Click the Save button ( ).

6. The XML Configuration Data Designer screen appears.



7. If desired, you may specify a style sheet for the XML configuration. Use the field on the right above the editor.

   To do so, either type the path and file name of the CSS file, or select an Ektron CMS400.NET-registered style sheet from the drop down list.

8. Design your XSLT in the Data Designer.

   See "Working with XML Forms" on page 173 for information about creating XSLTs using the Data Designer.

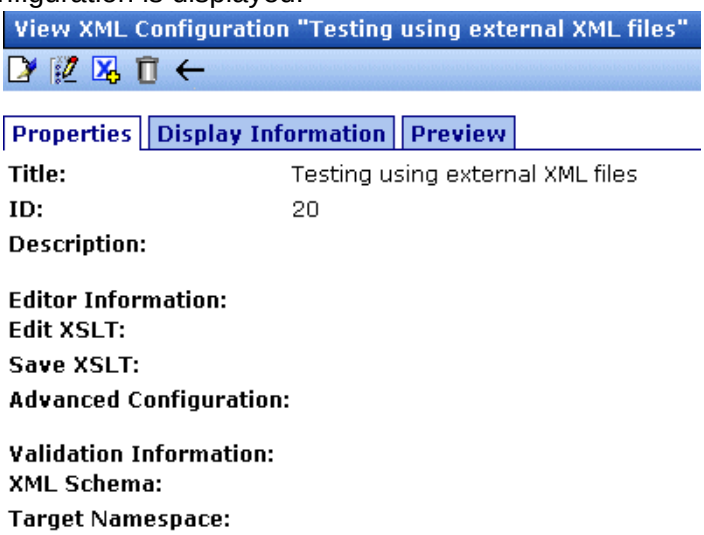
9. Click the Update button ( ).

You are ready to assign the XML configuration to a folder or content block. See "Assigning XML Configurations" on page 152 for more information.

Adding an XML Configuration Using External XML Files

To add an XML configuration using external XML files, follow these steps.

1. Access the XML Configurations screen, as described in "Accessing XML Configurations" on page 146.
2. Click the Add XML Configuration button ( ).
3. The Add XML Configuration screen is displayed.
4. Enter a **Title** for the XML configuration.
5. Click the Save button ( ).
6. The XML Configuration Data Designer screen is displayed.
7. Click the Back arrow ( ) to exit.
8. The View XML Configuration screen for the new XML configuration is displayed.



9. Click the Edit button ( ).
10. The Edit XML Configuration screen is displayed.

11. Enter the necessary information using the following table as a reference.

Section	Field	Description
Generic Information	Title	Name given to XML configuration.
	ID (display only)	ID number assigned when configuration is created.
	Description	Detailed description given to configuration by its creator or last editor.
Editor Information	Edit XSLT	XSLT applied to content while being edited.
	Save XSLT	XSLT used to transform the XML when saved to the database.
	Advanced Configuration	XML file that contains display information, schema validation, and other advanced XML data.
Validation Information	XML Schema	The .xsd file used to validate the XML content
	Target Namespace	The default namespace used for outgoing XML
DIsplay Information	XSLT1	XSLT 1 applied to XML data when viewed on a device
	XSLT2	XSLT 2 applied to XML data when viewed on a device
	XSLT3	XSLT 3 applied to XML data when viewed on a device
	XSLT Packaged	XSLT package applied to XML data when viewed on a device

NOTE When an XML configuration is created using the Data Designer, a default display XSLT is created which resembles the edit XSLT created in the editor. This default XSLT can be applied to the XML content.

12. Specify the default display XSLT for the configuration by clicking the corresponding radio button.

13. Click the Save button ( ).

XML File Verification

A verification button ( ) appears to the right of some fields on the Add XML Configuration screen. After you identify an XSLT or schema, you can click this button to verify that the file:

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

NOTE The XML Verification feature does *not* validate the contents of the XML file.

The following table explains possible results when clicking the verification button.

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

Assigning XML Configurations

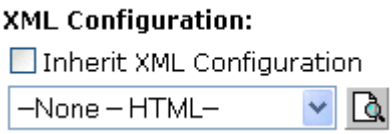
XML configurations can be assigned to either a content block or a content folder. When assigned to a content folder, all content blocks in that folder use that configuration.

Where Can XML Configurations be Assigned?

An XML configuration can be assigned in three locations.

Location in Ektron CMS400.NET	See Also
Edit Folder Properties screen	"Folder Properties" on page 33
Add Sub-folder screen	"Adding Sub-Folders" on page 36
View Properties for Content screen	"Content Properties" on page 66

Here is the **XML Configuration** field displayed in all locations.



In each location, assigning an XML configuration is identical. An XML configuration can be inherited from the parent folder, or you can assign a different one.

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

- "Inheriting an XML Configuration" on page 153
- "Assigning a Different XML Configuration" on page 153

If you assign no XML configuration, **Ektron CMS400.NET** assumes the content is XHTML.

Inheriting an XML Configuration

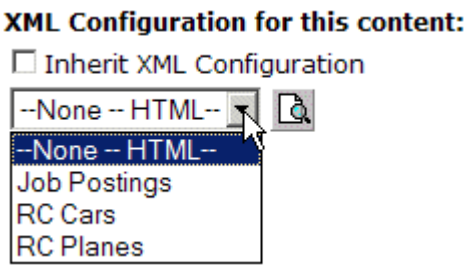
Content blocks and folders can inherit XML configuration settings from their parent folders. To set or break inheritance, add or remove the check from the **Inherit XML Configuration** check box.

Inherit XML Configuration Setting	Result
Unchecked	Content does not use the XML configuration assigned to the parent content folder. Use the drop-down list to assign another XML configuration. See "Assigning a Different XML Configuration" on page 153 for more information.
Checked	Use the XML configuration assigned to parent content folder.

Assigning a Different XML Configuration

To assign to a content block or folder an XML configuration other than the one assigned to the parent folder, follow these steps.

1. Access the XML configuration setting form, as described in "Where Can XML Configurations be Assigned?" on page 152.
2. If the **Inherit XML Configuration** box is checked, remove the check by clicking the box. See "Inheriting an XML Configuration" on page 153 for additional information.
3. Click the down arrow in the drop-down list to display available XML configurations.



NOTE See "Adding a New XML Configuration" on page 147 for more information about adding XML configurations.

4. Click the XML configuration you want to assign to the content block or folder.

NOTE Choosing **None--HTML** indicates the content is strictly HTML.

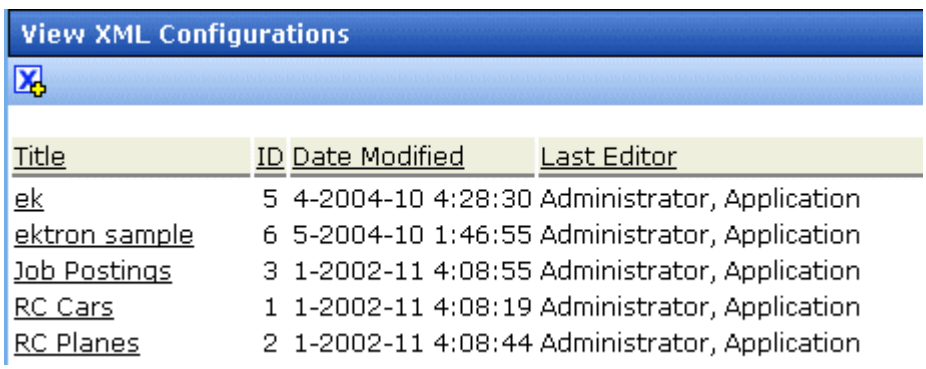
5. Click the Preview button ( ) to view the XML configuration.
6. The XML configuration appears.
7. Click ( ) to close the window.
8. The XML Configuration window closes, and you return to the Edit Properties window.
9. Click the Update button ( ).

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

Viewing XML Configurations

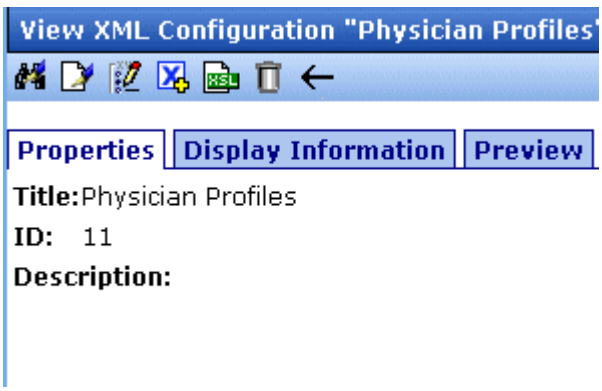
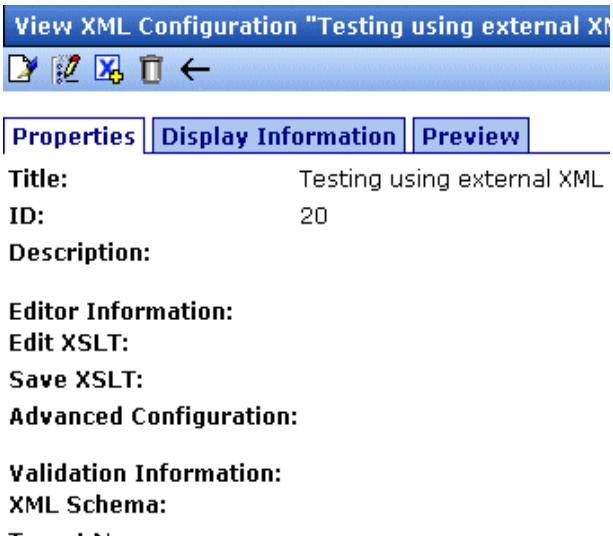
To view an XML configuration, follow these steps.

1. Access the View XML Configurations screen, as described in "Accessing XML Configurations" on page 146.
2. Click the configuration you want to view.



The View XML Configurations screen appears with a more detailed description of the configuration.

.

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

The View XML Configuration screen has three tabs.

- ”Properties Tab” on page 155
- ”Display Information Tab” on page 158
- ”Preview Tab” on page 157

Each tab is explained below.

Properties Tab

Field	Description
Title	Name given to XML configuration.
ID	ID number assigned by Ektron CMS400.NET upon creation of the configuration.
Description	Detailed description of configuration given by creator or last editor.

If the XML configuration was created using external XML files, (instead of the Data Designer), the following information also appears:

- ”Editor Information” on page 156
- ”Validation Information” on page 156

Editor Information

NOTE This section only appears if you do not use the Data Designer to create your XML configuration.

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

Field	Description
Edit XSLT	XSLT applied to the content when being edited. 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

NOTE This section only appears if you do not use the Data Designer to create your XML configuration.

Content that is created and edited with Ektron CMS400.NET may be validated with a schema if desired. The validation information contains information about the schema.

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

Preview Tab

The **Preview** tab displays the XSLT applied to the editor when an XML content block is created. This is the XSLT that was created for the XML configuration.

Display Information Tab

The display information tab lists 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 (created using the Data Designer)

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

After you create an XML configuration, you can modify it.

Before You Edit the Data Package!

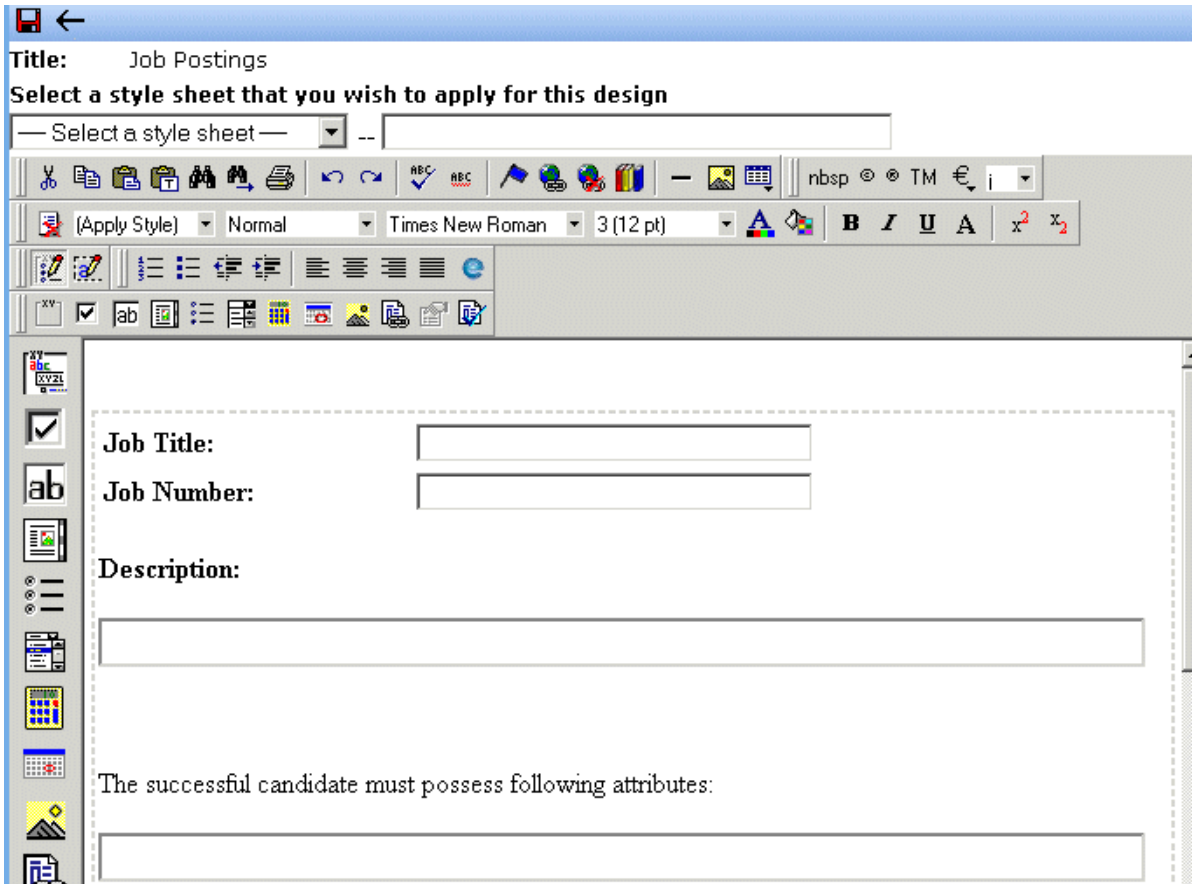
Before editing an XML configuration data package, it is important to realize the effects of the modifications. If an XML data package is edited, all content to which the configuration is applied is updated. Information that was originally created may be lost, depending on the changes made to the data 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 screen. See ”Creating XML Configurations Based on Existing Configurations” on page 161 for more information.

Editing a Data Design Package

To edit a data design package, follow these steps.

1. Access the View XML Configurations screen, as described in "Accessing XML Configurations" on page 146.
2. Click the XML configuration you want to edit.
3. The View XML Configuration screen appears with a more detailed description of the configuration.
4. Click the Data Design Mode button ( ) at the top of the screen.
5. The Edit Data Design Package screen displays the current package.



6. Make the necessary changes to the Data Design package in the editor. See "Working with XML Forms" on page 173 for information about creating XSLTs using the Data Designer.

7. Click the Update button ( ).

Editing XML Configurations

After you create an XML configuration, it can be modified when files defined in the configuration have changed. To edit an XML configuration, follow these steps.

1. Access the View XML Configurations screen, as described in "Accessing XML Configurations" on page 146.
2. Click the XML configuration you want to edit.
3. The View XML configuration screen is displayed.
4. Click the Edit button ( ).
5. The Edit XML Configuration screen is displayed.
6. Edit the necessary fields to update the XML configuration.
7. Click the Update button ( ).

Now, 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 editable fields on the Add XML Configuration screen, the following button appears.

After you enter the file name for an XSLT or schema, you may click this button to verify that the file:

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

The following table explains the possible results when clicking on the button.

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

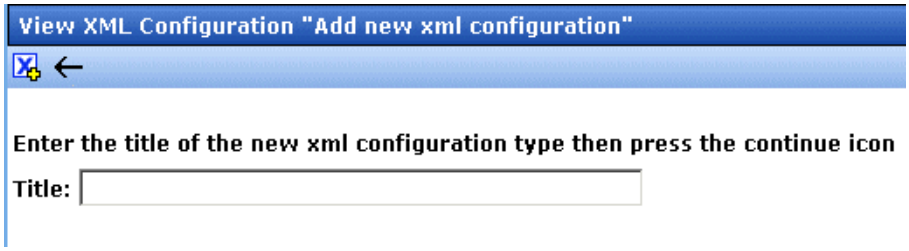
Creating XML Configurations Based on Existing Configurations

Whenever major changes must be made to an XML configuration, Ektron recommends creating a copy of it and modifying the copy. In this way, you do not affect the content controlled by the original configuration.

To create a new XML configuration based on an existing one, follow these steps.

1. Access the View XML Configurations screen, as described in "Accessing XML Configurations" on page 146.
2. Click the XML Configuration you want to view.
3. The View XML Configuration screen appears with a more detailed description of the configuration.
4. Click the Create New XML Configuration button ( ).

5. The Add XML Configuration screen is displayed.



6. Enter a **Title** for the new configuration.
7. Click the Add XML Configuration button ( ).
8. The View XML Configuration screen for the new XML configuration is displayed. From here, you can perform the necessary actions on the XML configuration.

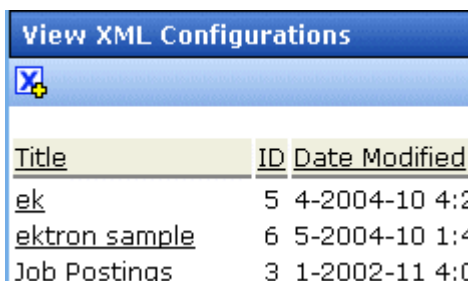
Viewing Data Designer XSLTs

When an XML configuration is created using the Data Designer, an XSLT is 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, content is displayed using the default XSLT displayed in the View XSLT screen.

To view the XSLT for an XML configuration, follow these steps.

1. Access the View XML Configurations screen, as described in ”Accessing XML Configurations” on page 146.
2. Click the XML configuration whose XSLT you want to view.



NOTE The XSLT only appears if the XML configuration was created using the Data Designer.

3. The View XML Configuration screen appears with a more detailed description of the configuration.
4. Click the View XSLT button ( ).
5. The View XSLT screen is displayed.

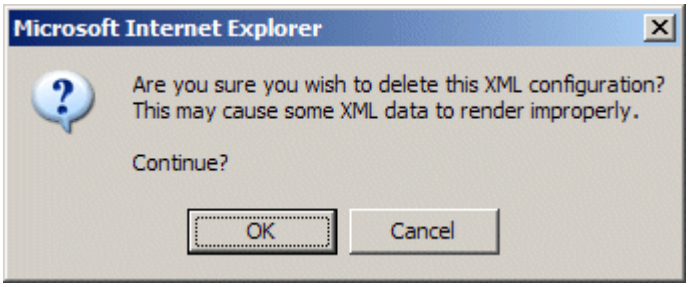
You can use this information to create your display XSLT.

Deleting XML Configurations

XML configuration that are no longer needed may be deleted from the Web site. To delete an XML configuration, follow these steps.

1. Access the View XML Configurations screen, as described in "Accessing XML Configurations" on page 146.
2. Click the XML configuration you want to delete.
3. The View XML Configuration screen is displayed.
4. Click the Delete button ( ).

5. A confirmation message is displayed.



6. Click **OK**.

XML Indexing

Introduction

XML Indexing makes it easy to search through the XML information collected by your Web site and display the results on a Web page. The results appear as a list of topic titles, optionally followed by the content block summary.

Collection of information has never been easier. The Data Designer lets you choose which XML fields to index. You can also validate those fields to be numbers, dates, Boolean or string values, creating a powerful yet simple solution. After you identify the information to be indexed, a search dialog is automatically created. Where appropriate, the dialog automatically populates drop down lists from the indexed data.

NOTE As the name implies, XML indexing is only available for information collected on XML forms. It cannot find information in XHTML content.

User vs. Developer Selected Search Criteria

There are two ways to use XML Indexing feature to make your Web site more robust.

- *Present a screen of search criteria.* A visitor to your site uses the screen to select the kind of information he is looking for. For example, if your site sells outdoor clothing, the user might want to see all wool hats for men under $20.00. A custom function determines the format of the results page.
- *Determine the search and display criteria programmatically using a custom function*. Your Web developer inserts a function on a Web page that specifies search and display criteria. For example, if your site sells books, a visitor to your site sees a navigation link **Find books under $5.00**. When he clicks that link, the function searches your site and returns a Web page (possibly a navigation sidebar) displaying all books in your database whose price is less than $5.00.

Types of Search Criteria

XML Indexing allows multi-dimensional searches on all types of XML data. If the field type is string, a search can look for an exact phrase or the occurrence of any word in the phrase. Numerical and date information can be searched using expressions such as greater than, less than, or between two values.

List and choices type fields let the user select from several predetermined values. When searching on these fields, the screen can display all values and let the user select relevant ones.

For every search field, **NoSelection** is a possible value. If this is chosen, the search disregards that field when compiling results.

Displaying Search Results

The results page can show content that satisfies all search criteria *or* one or more criteria. If you choose the latter option, the results page shows *weighted* results. That is, pages with the highest number of matches (the most relevant ones) appear first, followed by pages with fewer matches. The number of hits is indicated by an asterisk.

So, if one page matches all of the selection criteria, it appears in the top group. If another page matches some of the selection criteria, it also appears but lower on the page.

In the example below, the first two Web pages had two matches with the selection criteria, while the third page (RC Cheetah) had one match.

* *

RC SAAB

RC Internationalsoldest entry in to the competitive RC racing world is the RC SAAB.

RC Sportster

RC Internationals first entry in to the competitive RC racing world was the RC Sportster. The RC Sportster is designed for the entry level RC enthusiast.

---

*

RC Cheetah

RC Internationals most successful entry in to the competitive RC racing world is the RC Cheetah. The RC Cheetah is designed for the hard core RC enthusiast.

Go Back

By setting recursive and “filter by folder” properties, you can segregate the search to selected folders on your Web site.

The following are examples of industries that can benefit from XML Indexing.

Industry	Use XML indexing to find
Health Care	A cardiologist whose practice is located in your city
Human Resources	Sick time policy
Real Estate	A house with a zip code of 03031 priced under $200,000.
Hospitality	A hotel in Boston
Online Retail	Fleece gloves for men
Educational	A course in .NET programming

Setting up a User-defined Search

To create a user-defined search, follow these steps.

Step	For more information, see
1. Select an XML configuration	"Accessing XML Configurations" on page 146
2. For each field to be searched, assign indexing capability	"Specifying Which XML Elements are Indexed" on page 168
3. Set up the search screen	"Search Dialog Setup" on page 170 and "Editing the Search Labels" on page 172
4. Have your Web developer set up a page to display a search screen and a results screen	The Ektron CMS400 Developer's manual section "Standard ASP.NET Methods" > "IndexSearch" and "IndexSearchDisplay"

Setting up a Developer-defined Search

To set up a developer-defined search, which defines both the criteria and the results page, use the `ecmIndexSearchCollectionDisplay` function. This is documented in the **Ektron CMS400.NET** Developer's manual section "Standard ASP.NET Methods" > "IndexSearchCollectionDisplay."

You can also setup a developer defined search using the IndexSearch Server Control. For more Information, see the **Ektron CMS400.NET** Developer's manual section "Ektron CMS400.NET Server Controls" > "List of Server Controls" > "IndexSearch Server Control."

Specifying Which XML Elements are Indexed

You can index the following types of fields:

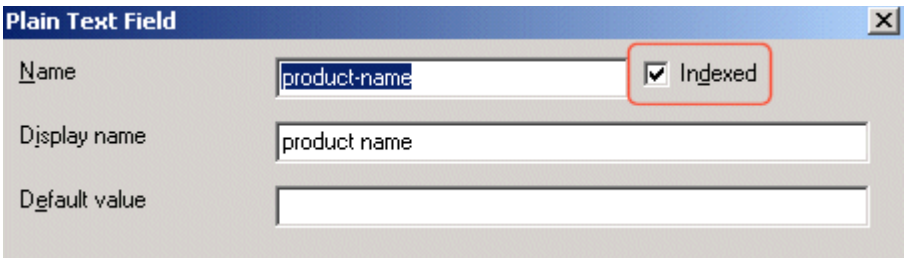
- Checkbox
- Plain Text
- Choices
- List

- Calculated
- Calendar

To enable indexing for any field on an XML form, follow these steps.

1. Select an XML configuration that you want to index. *See Also:* "Accessing XML Configurations" on page 146
1. Open its Data Design. *See Also:* "Working with XML Forms" on page 173
2. Move the cursor to the field you want to index.
3. Right mouse click on the field and choose **Field Properties**.
4. On the dialog box that appears, check **Indexed.**

.



Validation

Validation ensures that the user completing the XML form enters the right type of data. You can decide if the user's input should be a number, boolean, date, string, zip code, etc. If you do not specify type attributes using validation data, the field is a string. *See Also:* "Validation" on page 195

Validation is especially important when users search XML data because, if used properly, it can ensure that the search find the correct information.

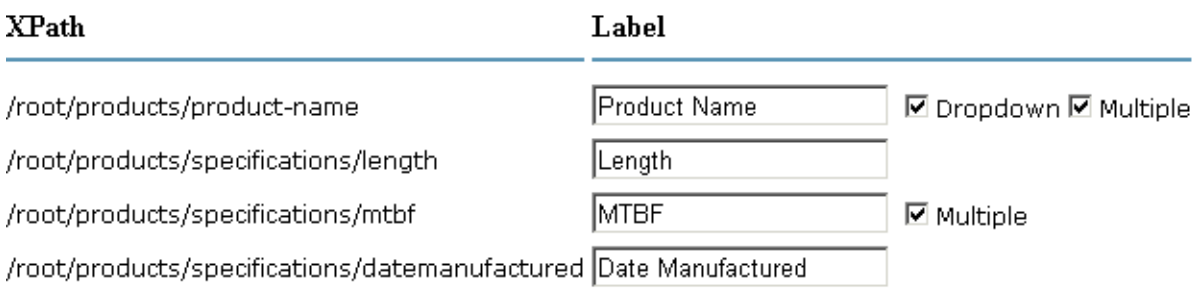
For example, if a form field collects a zip code but you set its type to plain text, the user completing the form can insert anything into the field. If the user inserts the letter "o" instead of the number zero (0), the field accepts that input and that record will not be found by the search. On the other hand, if you set validation to zip code, the user can only insert five or nine digits -- any other entry is rejected when the user submits the form.

Search Dialog Setup

When you save a Data Design form, a dialog appears that lets you set up the search form (illustrated below).

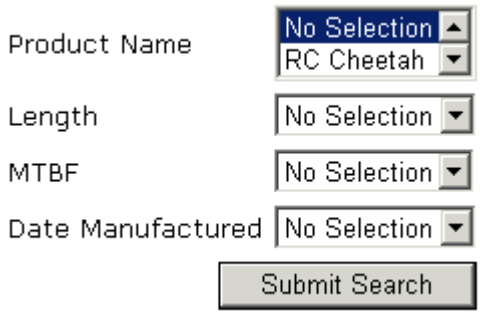
NOTE You can also edit the field labels using the Edit Index Search screen. However, on that screen, the **Dropdown** and **Multiple** checkboxes are not available. *See Also:* "Editing the Search Labels" on page 172

.



The information on this screen is explained below.

Screen section	Description
Xpath	The xpath to each indexed field. Only indexed fields appear.

Screen section	Description
Label	Enter the text that describes the field on the search screen. Below is an example of how the labels appear on the Search screen.  If the field type is • *checkbox*, a check box appears on the Search screen • *choices or list*, all values appear on the Search screen • *calendar*, the user can choose a specific date, any range of dates or beginning and end dates on the Search screen • *plain text* with a whole number specified in the validation criteria, the user can choose a specific number, any range of numbers or beginning and ending numbers on the Search screen • *plain text with no validation criteria*, the display is determined by the **Dropdown** and **Multiple** checkboxes (below). If Dropdown and Multiple are not checked, the search screen contains these values: - No Selection - Exact phrase - Contains
Dropdown	If the field type is Choices or List, and you check this box, the user performing the search can choose from the choice or list values when selecting search criteria. If the field type is a plain text, and you check this box, the user performing the search can choose among any value stored in this field of the Data Design when selecting search criteria.
Multiple	Check this field if you want to allow the user performing the search to select more than one value. Only active with plain text, List, and Choices fields.

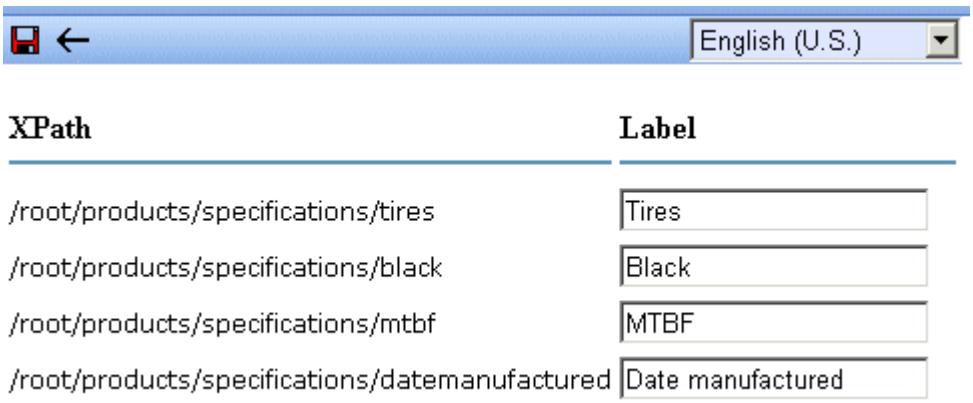
Editing the Search Labels

This screen lets you change the labels that describes the search fields on the search screen.

You can create a set of labels for every supported language by using the language dropdown list in the upper right corner of the screen. *See Also:* "Working with Multi-Language Content" on page 311

To change the search screen labels, follow these steps.

1. In the Workarea, go to **Settings > Configuration > XML Configurations**.
2. Click an XML configuration.
3. Click the Edit Full Text Search button( )
4. The Edit Screen appears.



5. From the language dropdown list in the top right corner, select the language whose labels you want to edit.
6. Change the labels as needed.
7. Click the Save button ( ).

as described in "Accessing XML Configurations" on page 146.

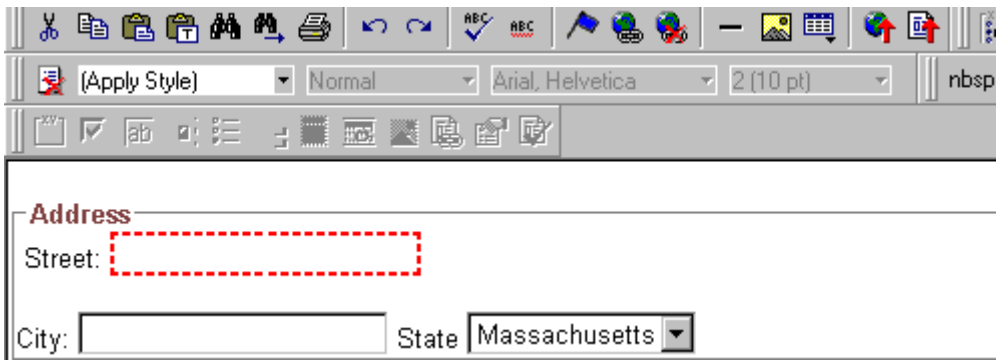
Working with XML Forms

Introduction

Ektron CMS400.NET'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; Firefox 1.0 or later; Internet Explorer 5.5 or later.

For example, you may create the following screen.



This screen can store information entered by a user as the following XML.

```
 <address>
<street>123 Sesame St.</street>
<city>New York</city>
<state>NY</state>
 </address>
```

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

NOTE The samples installed with **Ektron CMS400.NET** provide a good example of using the Data Designer. To try them out, click the Windows Start button (lower left corner of the screen) and follow this path: **Start > Programs > Ektron > eWebEditPro4 > Samples > ASP > Data Design > ASP Data Design Sample**.

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

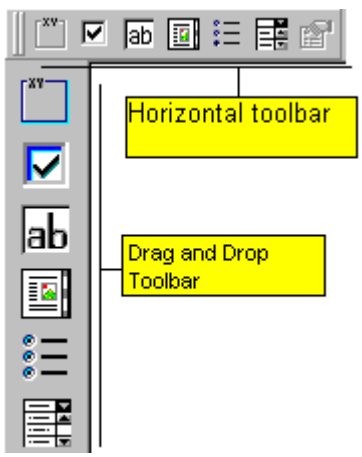
- ”Differences in Ektron CMS400.NET” on page 174
- ”Design Mode vs. Data Entry Mode” on page 175
- ”Designing a Screen” on page 176
- ”Inserting a Field Type” on page 177
- ”Sample Screen Design” on page 179
- ”Data Designer Field Types” on page 186

Differences in Ektron CMS400.NET

When you use the Data Designer, **Ektron CMS400.NET** 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.

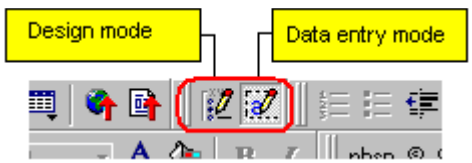


Both toolbars provide mostly the same buttons. The major difference between them is how you use the button to add a field to the screen. If you are using the *horizontal* toolbar, place the cursor where you want field, and click the toolbar button.

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 175.)



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

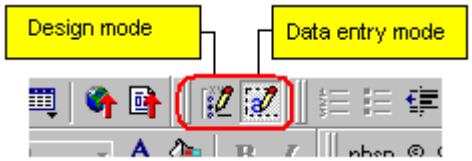
- several regular toolbar buttons are grayed out because they do not work with Data Designer

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.



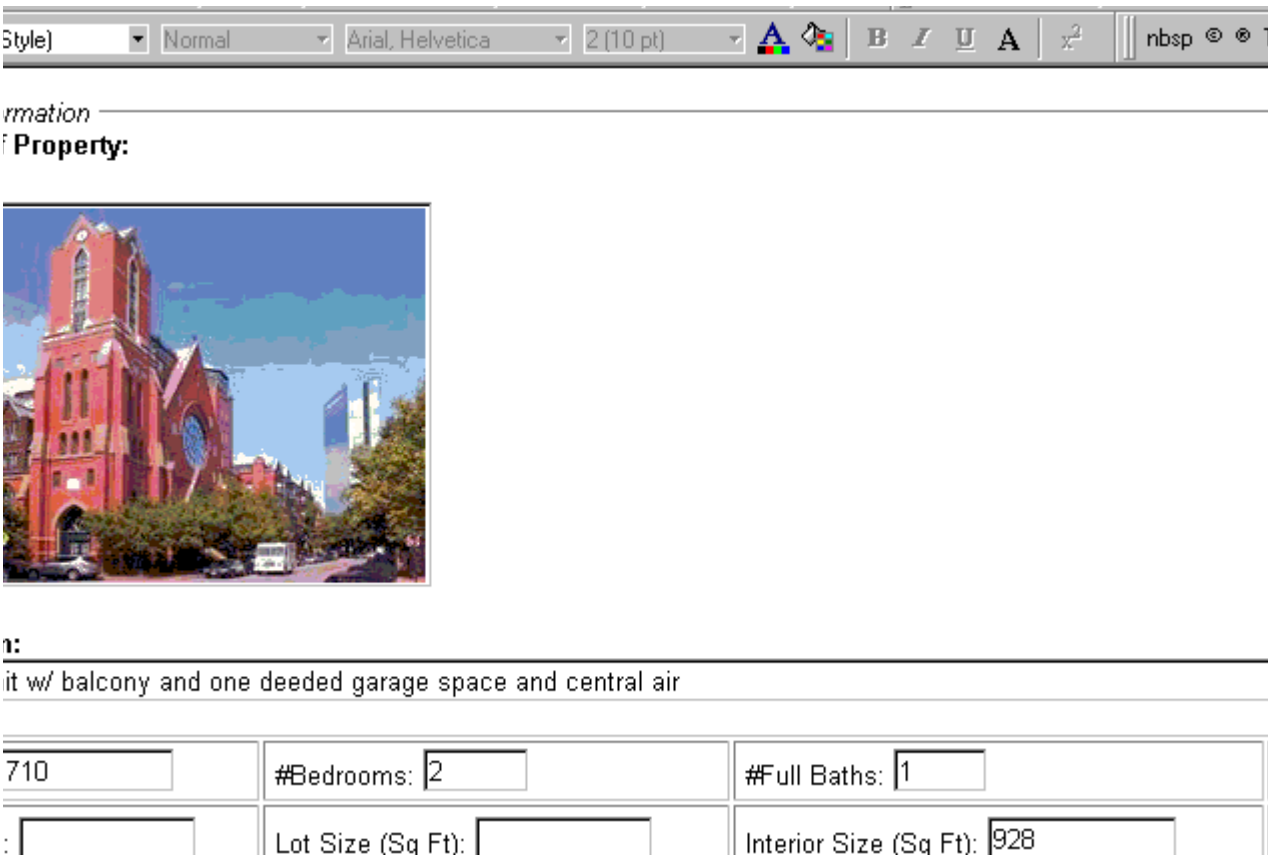
When you begin to create a data entry screen, you are in design mode. To test the screen as the user will see it, click the Data Entry button (). To switch back to Data Entry mode and modify the data entry screen, click the Data Designer button ().

Designing a Screen

To design a screen that captures XML data, you

1. Ask your system administrator to enable a version of **Ektron CMS400.NET** that includes the Data Designer. (The administrator should refer to the Data Designer chapter of the Developer's Reference Guide.)
2. For each field on the screen, select a field type, and place it on the screen. "Inserting a Field Type" on page 177 explains the kind of field that each button represents.

   You can also use **Ektron CMS400.NET**'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.



Inserting a Field Type

Ektron CMS400.NET provides several options that let you insert or edit fields in the editor. Each field type is described below.

Field type	Icon	Description	For more information, see
Group Box		Groups related fields, which can be surrounded by a box and have a caption	"Group Box ()" on page 186
Checkbox		User's response is either checked or unchecked	"Checkbox ()" on page 190

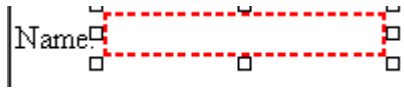
Field type	Icon	Description	For more information, see
Plain Text		Free text field; user cannot format text	"Plain Text()" on page 191
Rich Area		Free text field; user can format text using the editor	"Rich Area ()" on page 196
Choices		Several choices appear on screen. User checks appropriate boxes. All user choices are inserted as values within single XML tag.	"Choices ()" on page 198
List		Same as Choices except options appear in a drop-down box	"Select List ()" on page 201
Calculated		Performs calculations using other fields on the screen	"Calculated Field ()" on page 204
Calendar		Lets user insert a date by clicking a calendar	"Calendar Field ()" on page 214
Image Only		Lets user insert an image	"Image Only Field ()" on page 216
File Link		Lets user insert a link to a file, such as a PDF document	"File Link Field ()" on page 218
Field Properties		Lets you change the properties of any field. Select the field then click this button. This option is also available on the right click menu, but not available on the drag and drop toolbar	
Validate		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.

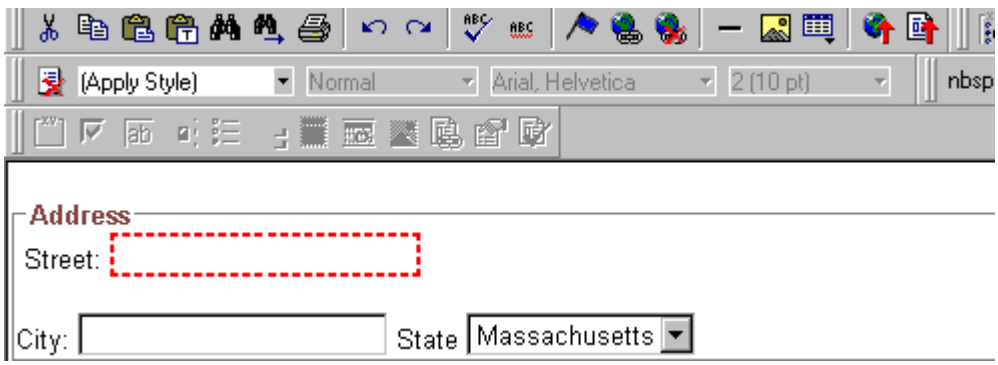


4. Click the cut icon ( ) to remove the field.

Usually, the field label is not deleted when you delete a field. To delete the label, use standard **Ektron CMS400.NET** editing buttons.

Sample Screen Design

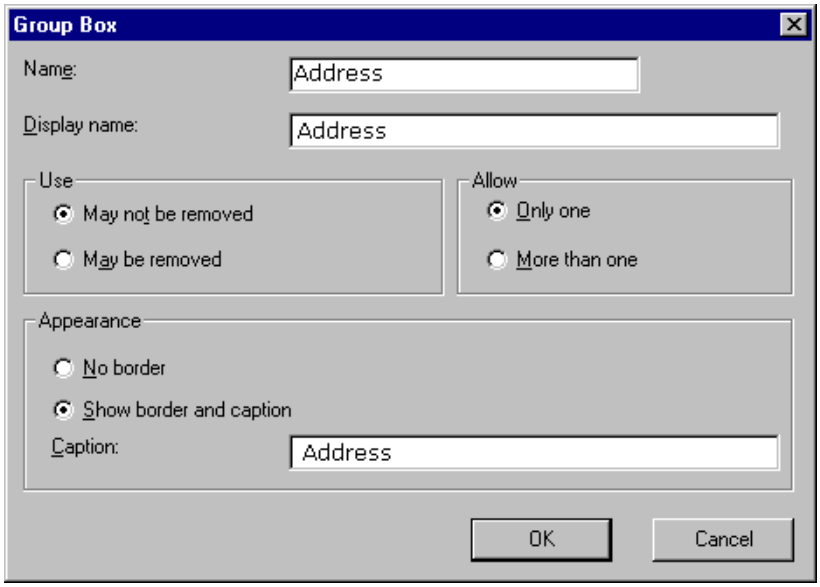
This section provides a brief overview of designing a screen, so that you can learn how the pieces fit together. Let's assume you want the screen to look like this.



NOTE The following example helps you understand how to create a simple data entry screen. It does not explain how to save a screen so that a user can enter data into it. You can access a good sample by navigating to **Start > Programs > Ektron > eWebEditPro > Samples > ASP > Data Design > ASP Data Design Sample**. When you are ready to create an actual screen, ask your system administrator to help determine a method for saving the screen and making it available to users for data entry.

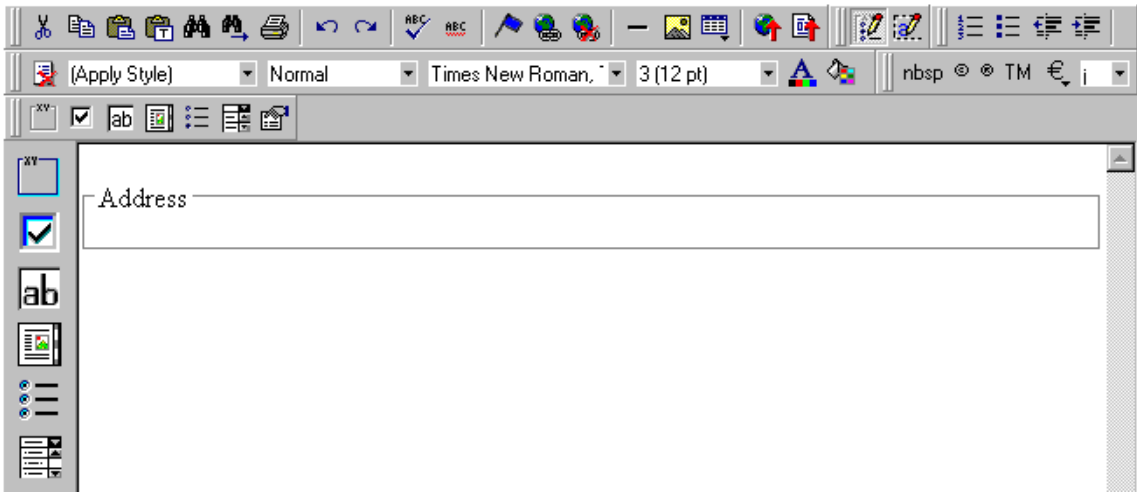
To create such a screen, follow these steps.

1. Sign on to **Ektron CMS400.NET** in Data Designer mode. (Ask your system administrator how to do this. The Developer's Reference Guide (version 4.0 and higher) provides details.)
2. Since you want to surround the data entry fields with a box and a caption, drag the Group Box button ( ) from the drag and drop toolbar onto the screen. Then, complete the dialog as shown below.

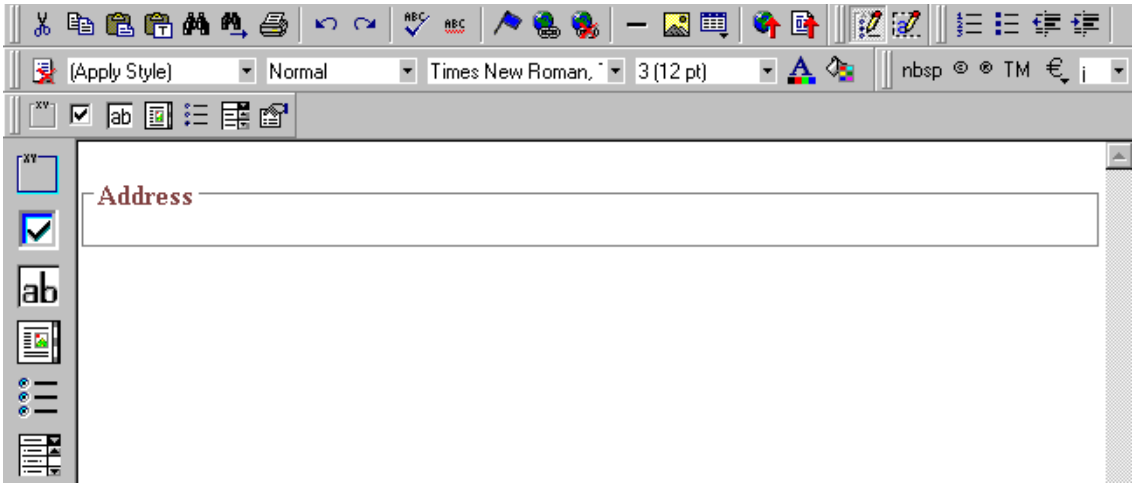


NOTE Later in the section, documentation is supplied for each field on the dialog box. Since this section is providing an overview, it does not delve into those details.

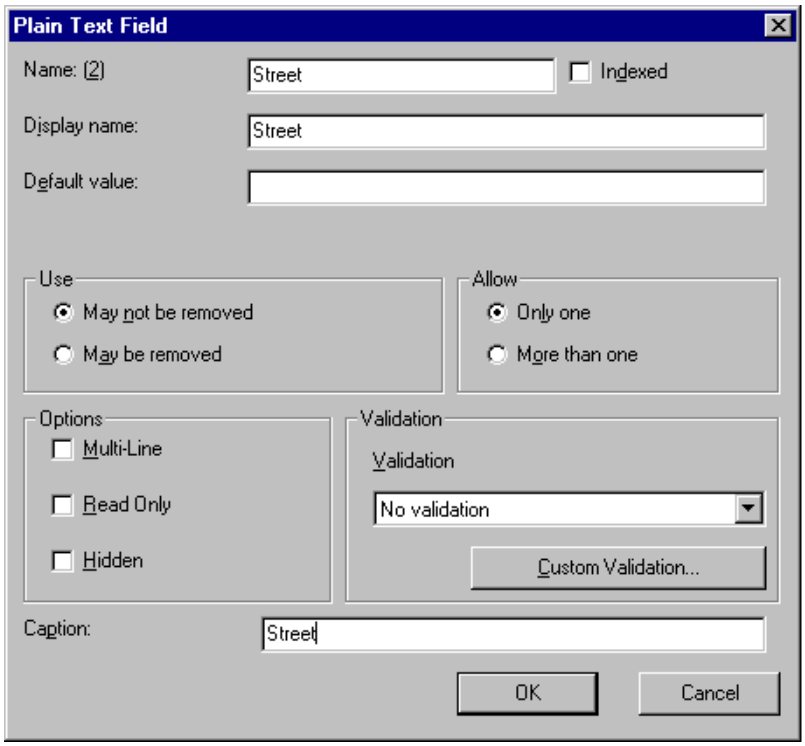
At this point, the screen looks like this.



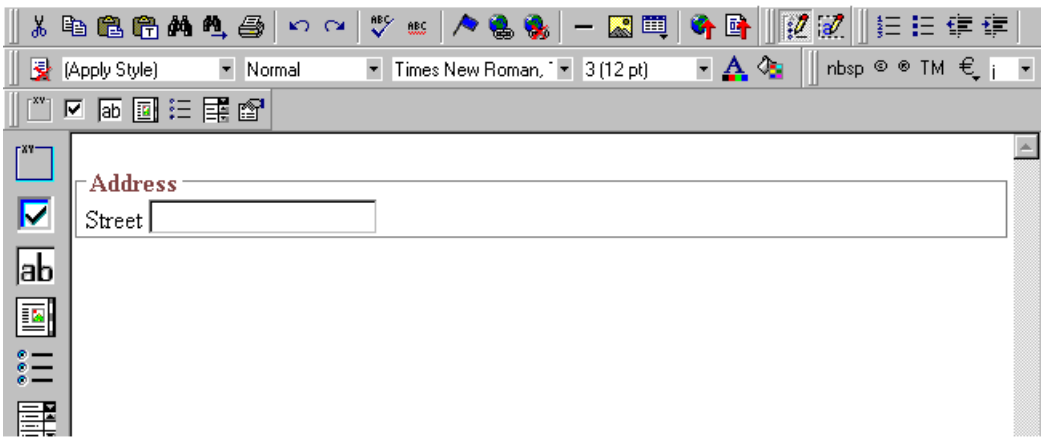
3. Select Address then apply bold and the custom color shown above. Now the screen looks like this.



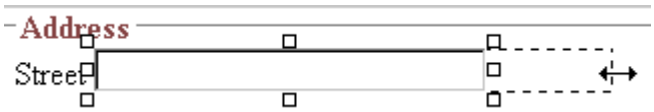
4. The next field, street, should let the user enter text. So, drag the plain text field icon ( ) into the space below **Address**. Then, complete the dialog as shown below.



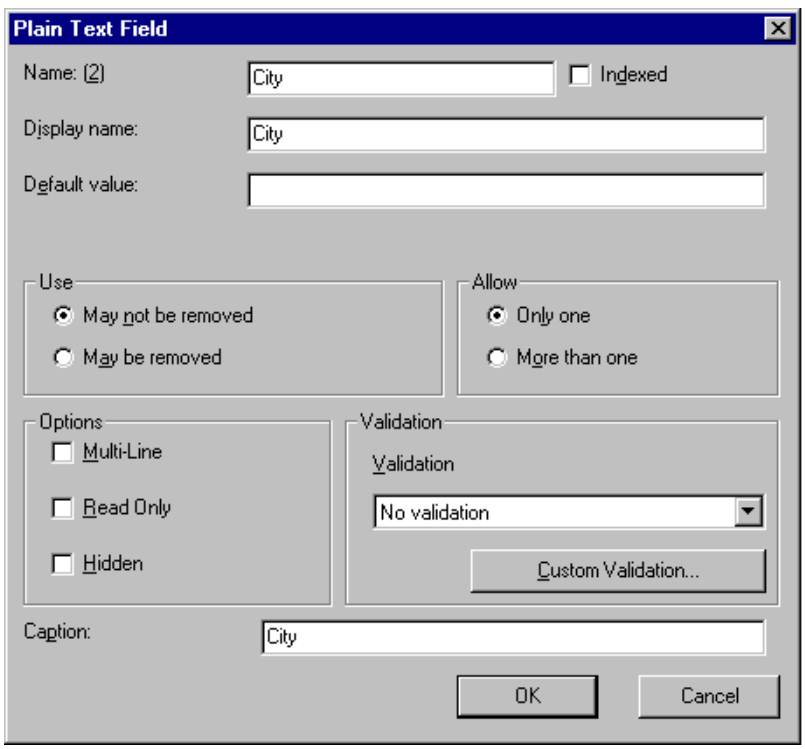
Now, the screen looks like this.



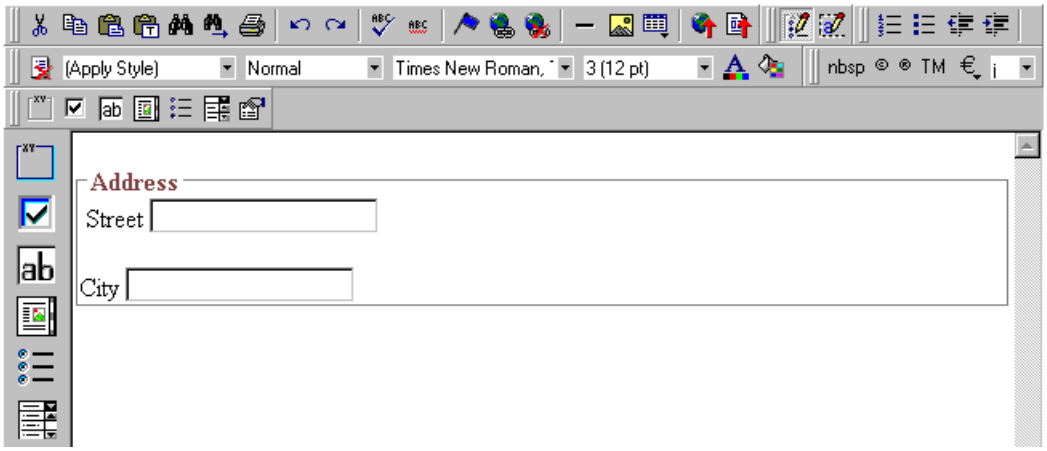
Note that the **Street** field is not wide enough. To widen it, click the field, move the cursor until you see a two-sided arrow, and drag the arrow to the right.



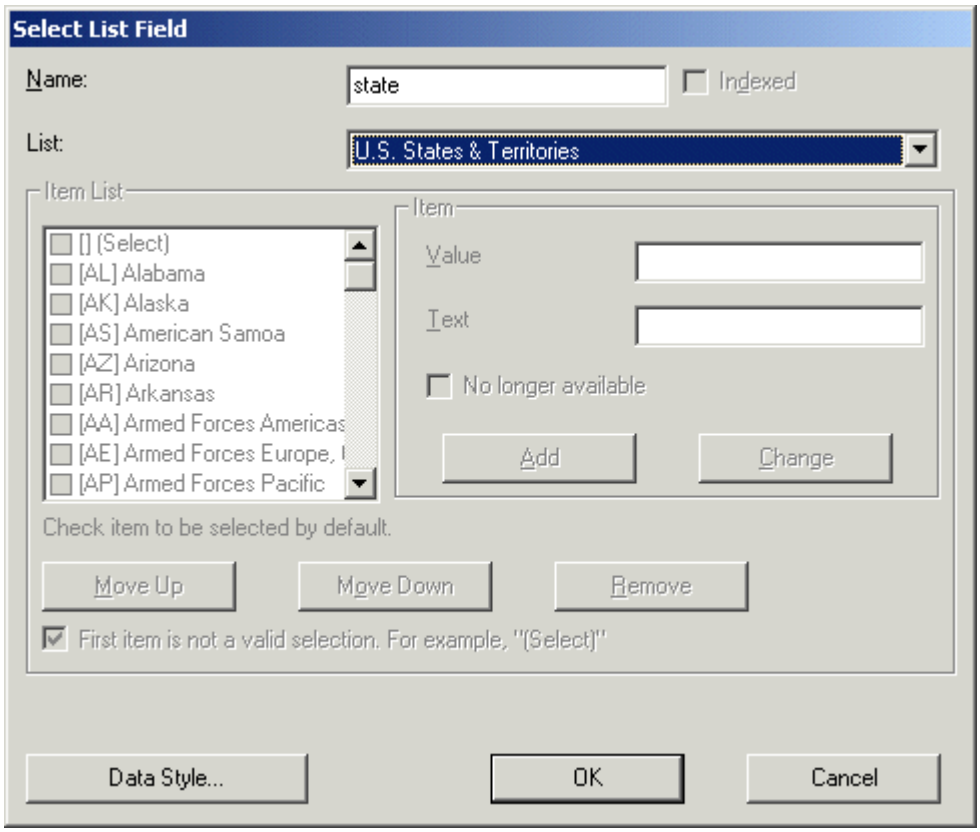
5. The next field, **City**, should also let the user enter text. Assume that you want **City** to appear in the line below **Street**. To make room for **City**, move the cursor to the end of the **Street** field and press <Enter> to create a new line. Next, drag the plain text field icon ( ) into the line below **Street**. Then, complete the dialog as shown below.



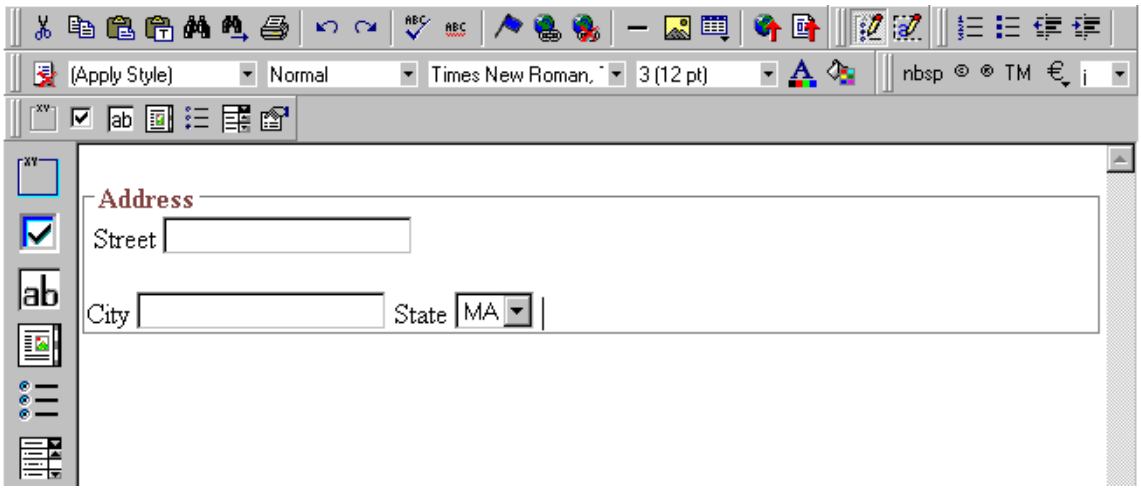
Now, the screen looks like this.



6. 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 ( ) into that space. Then, complete the dialog as shown below.



Now, the screen looks like this.



The above example is very simple and does not use some of the Data Designer's more powerful and flexible features. To learn more about Data Designer, read the rest of this chapter.

Data Designer Field Types

To help you use all of the Data Designer's capabilities, this section explains each field type you can insert. As you will see, they are very flexible and should accommodate all of your needs when designing a data entry screen.

Group Box ( )

A Group Box field lets you group related fields together on a screen by surrounding them with a box and optionally placing a caption above them.

After you insert a Group Box field, to insert other kinds of fields within the box,

- drag the fields into the box (if you are using the drag and drop toolbar)

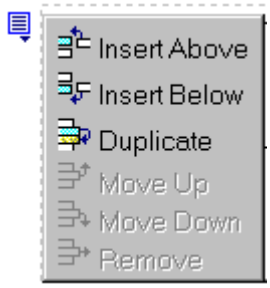
or

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

Advantages of Grouping Fields

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

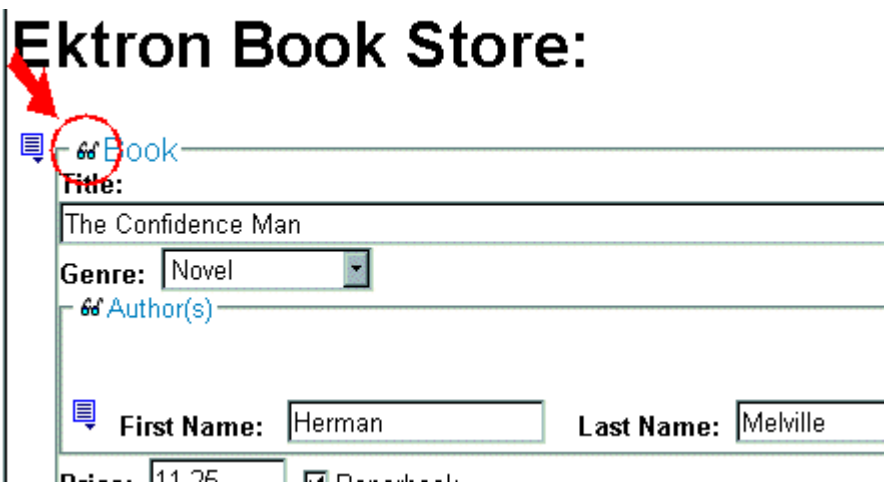
For example, if a screen collects several fields of information about each telephone call, the user could simply click the **Insert Below** button to insert a new group of fields, ready to collect information about the next call.



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.

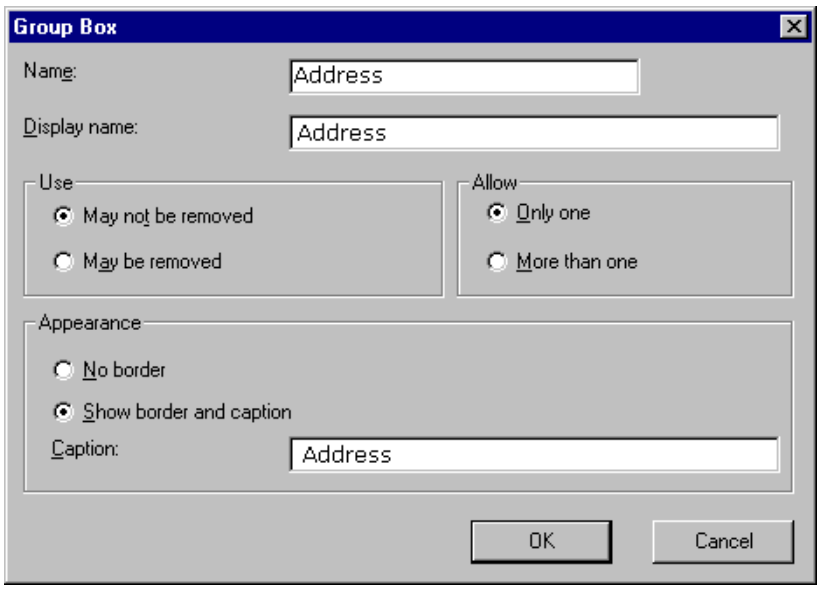
Use the eyeglass icon to expand or collapse the display of fields within a group.

Expanded Group Field with glasses icon highlighted



Collapsed Group Field

Dialog Box



Fields on the Group Box Dialog

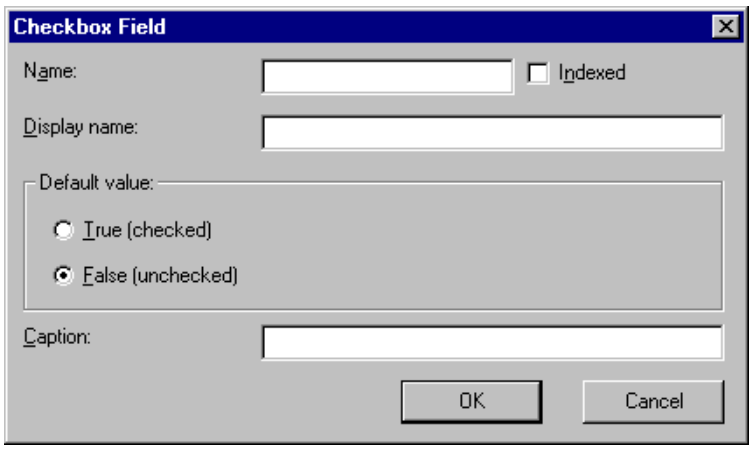
Field	Description
Name	Enter the name of this field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|`~) into this field. **The Name Field's Default Value** By default, the Data Designer assigns a name made up of **Field** followed by the next available number. So, the first field's default name is **Field1**, the second field's default name is **Field2**, etc. You can change the default if you want.
Display Name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 220
Allow	See "The Allow Field" on page 221
Appearance	Click **Show border and caption** if you want to surround the fields in this group with a box. You can also create a caption to appear in the top line of the box. Click **No border** if you do not want to surround the fields in this group with a box.
Caption	If desired, enter text to describe this group of fields on the data entry screen. For example After you insert this field onto the screen, you can use **Ektron CMS400.NET**'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

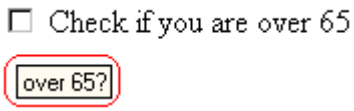
☐ Check if you are over 65

Dialog Box



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 189
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 not appear, depending on how your administrator set up your system.

Field	Description
Display name	Enter text that appears when a user hovers the cursor over this field (circled in red below). 
Default value	If you want this field to be checked when the screen first appears, click **True**. Otherwise, click **False**.
Caption	Enter text to guide the user's response to this field. To continue the above example, the caption would be **Check if you are over 65**. After you insert this field onto the screen, you can use **Ektron CMS400.NET**'s formatting capabilities to modify its size, font, color, and other attributes. Note: The Caption field only appears on this dialog when you create the Check Box field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.

Plain Text( )

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.

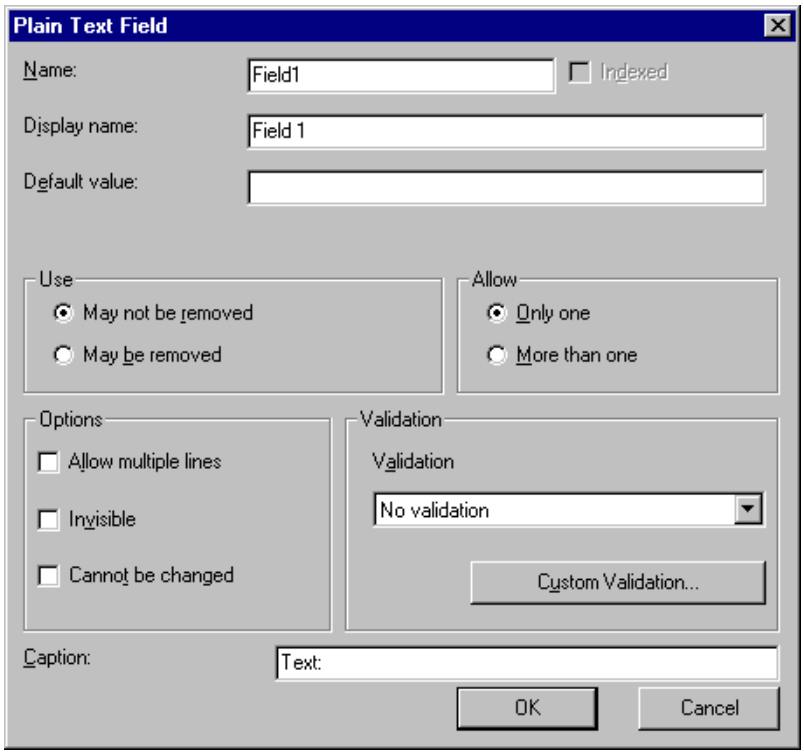
- You can validate the user response. For more information, see "Validation" on page 195.

- You can adjust the field's width by dragging it. See "Resizing a Plain Text Field" on page 196.
- 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 CMS400.NET**'s formatting capabilities.
- You can enter custom tags.

Dialog Box



Fields on the Plain Text Dialog

Field	Description
Name	Enter the name of this field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|\`~) into this field. *See Also:* "The Name Field's Default Value" on page 189
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 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 220
Allow	See "The Allow Field" on page 221

Field	Description
Options	**Invisible** - Check here to make this field hidden in Data Entry mode. This option lets you store unseen information in each XML document. An example might be putting a version number for the data design so that XML documents can be upgraded to newer versions using an XSL transform. **Allow multiple lines** - Check here to let this text box expand to accommodate the user's input. If you do not check this box, a single line input box appears on the data entry screen to accept user input. A field can be either invisible or cannot be changed -- it cannot be both. **Cannot be changed** - Check here to make this field read-only. That is, the user cannot insert data into it in Data Entry mode. You might use this option to provide user instructions for completing the screen.

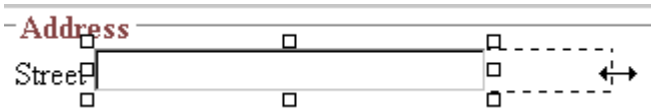
Field	Description
Validation	Select the kind of validation to apply to this field. Your choices are: • **No validation** - the user's response is not checked • **Cannot be blank** - the user must enter a response • **Non-negative whole number or blank** - the user must enter a positive whole number *or* no response • **Non-negative whole number (required)** - the user must enter a positive whole number • **Decimal number or blank** - must be a decimal number (for example, 12.345 or 12) or blank. A leading minus sign "-" is allowed. The decimal point must be a period (.), even in locales that normally use a comma (,). Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000. • **Decimal number required -** must be a decimal number (it cannot be blank) of none, one, or two decimal places. A leading minus sign "-" is allowed. The decimal point must be period (.), even in locales that normally use a comma (,). • **Percent: (0-100) required -** the user must enter a whole number from 0 to 100 • **Zip code (US only)** - the user's response must consist of 5 (*nnnnn*) or 9 digits separated by a dash after the fifth (*nnnnn-nnnn*) • **Social Security number (US only)** - the user's response must consist of nine digits in this pattern: *nnn-nn-nnnn* • **Custom -** You can create custom validation For more information, see "Custom Validation" on page 224. If you assign to this field any value other than **No validation**, the field is initially surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criterion, the field remains surrounded by red dashes. The system administrator determines whether or not the user can save an invalid document.

Field	Description
Caption	Enter text to describe this field on the data entry screen. It appears to the left of the field. After you insert this field, you can use **Ektron CMS400.NET**'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 222

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 191

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

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 189
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 set up your system.

Field	Description
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 220
Allow	See "The Allow Field" on page 221

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

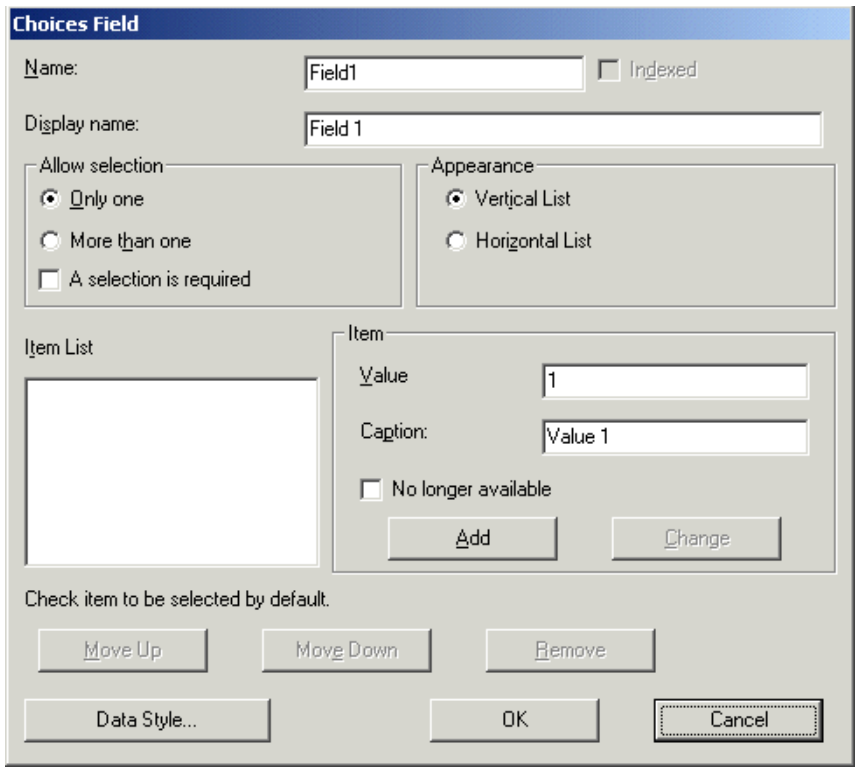
The following capabilities are available with a Choices field but not a Select List field.

- 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.

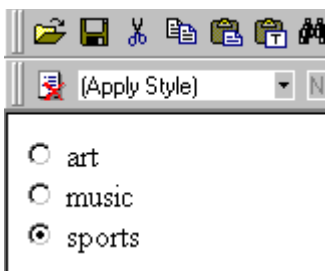
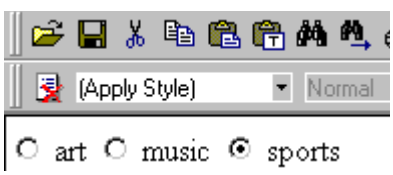
- The user can only select one item.
- Only the default item appears on the screen. To the right of the field, a black down arrow appears (circled in red below). The user must click the arrow to display all items and select one.

Dialog Box



Fields on the Choices Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|\`~) into this field. *See Also:* "The Name Field's Default Value" on page 189

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 **Indexed** field may or may not appear, depending on how your administrator set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this choice list.
Allow selection	Click **More than one** to allow the data entry user to select more than one item on the data entry screen. Otherwise, click **Only one**. For example, if you click **More than one**, and the choices are: music, art, sports, the user could select all three choices. If you click **Only one**, the user could only select one choice. **A selection is required -** Check this box if the user must select at least one item in the list.
Appearance	Click **Vertical List** to arrange the choices vertically.  Click **Horizontal List** to arrange the choices horizontally. 

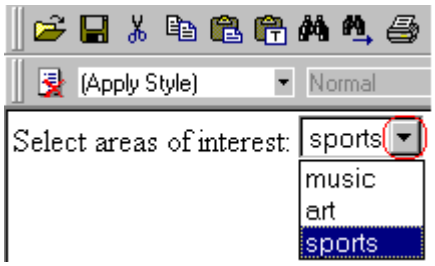
Field	Description
Item List	This section of the screen displays the items that you enter in the **Value** and **Text** fields. Buttons near the bottom of the screen let you remove items from this list as well as rearrange them. Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox. Note that if **Only One** is selected under **Allow selection** (above), only one item can be selected.
Value	Enter the value that is collected when the data entry user selects this item. For example, if **Interests** appears in the Name field, and you want `music` to be collected when the data entry user selects this item and saves the page, enter **music** here.
Caption	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use **Ektron CMS400.NET**'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 204
Data Style	See "The Data Style Field" on page 222

Select List ( )

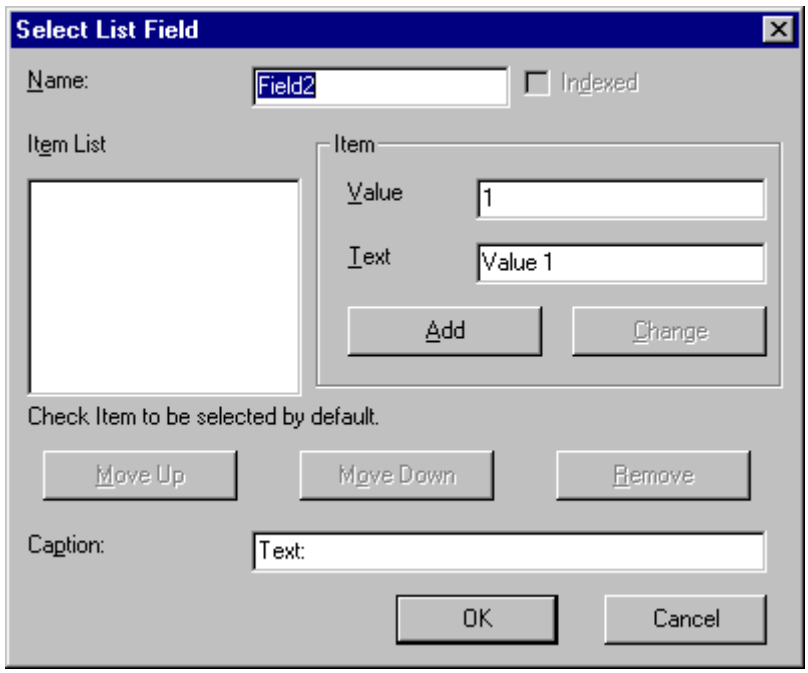
A Select List field is similar to a Choices field. The biggest difference is that the responses appear in a drop-down box instead of appearing separately. To see the choices, click the down arrow on the right side of the box (circled below).

See Also: "Choices Field vs. Select List Field" on page 198

For example:



Dialog Box



Fields on the Select List Field Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|\`~) into this field. *See Also:* "The Name Field's Default Value" on page 189
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 not appear, depending on how your administrator has set up your system.
List	
Item List	This section of the screen displays the items that you enter in the **Value** and **Text** fields. Buttons let you remove items from this list as well as rearrange them. Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox.
Value	Enter the value that is collected when the data entry user selects this item. For example, if **Interests** appears in the Name field, and you want `music` to be collected when the data entry user selects this item and saves the page, enter **music** here.
Text	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use **Ektron CMS400.NET**'s formatting capabilities to modify its size, font, color, and other attributes.

Field	Description
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 **No longer available** rather than removing the item. If checked, the item only appears in data entry mode *if* a document already contained the item when the check was applied. This field lets you render a value obsolete without invalidating an existing XML document. **Exception!** -- 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 example, "(Select)"	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 **Select a state**. 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.
Caption	Enter text to guide the user's selection. For example, if the user needs to select an area of interest, the caption could be **Choose your interests**. Note: The Caption field only appears on this dialog when you create the Select List field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.
Data Style	See "The Data Style Field" on page 222

Calculated Field ( )

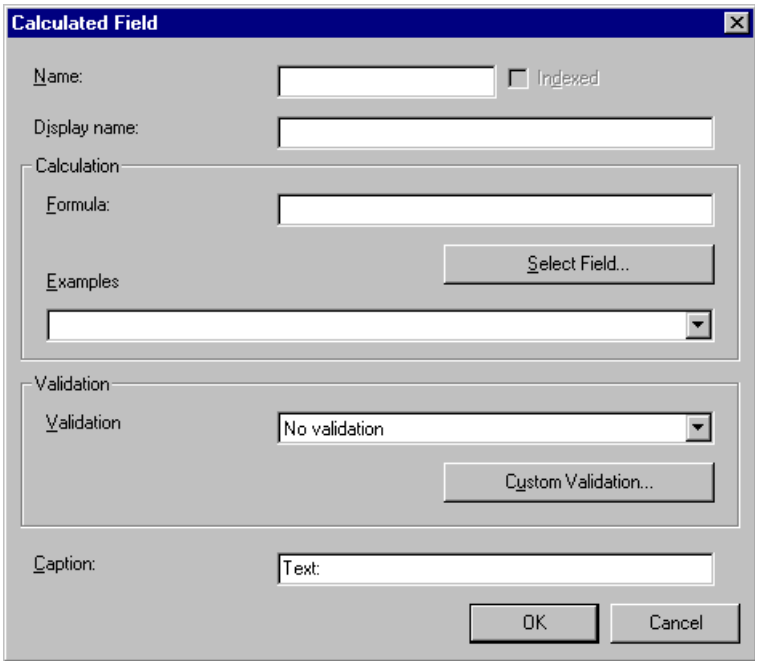
Use a calculated field to perform a calculation based on values in other fields. For example, if your screen collects mortgage information, you could create one field to collect the mortgage and interest payment and another to collect taxes and insurance. The calculated field could sum those two numbers and display the monthly payment.

You can validate a calculated field. For example, you can require a positive number between 100 and 1,000.

Calculated fields are display only -- users cannot edit them.

IMPORTANT! If a field will be referenced in a calculation, use the validation feature to require a value for that field. This forces the user to enter a number to be used in the calculation.

Dialog Box



Fields on the Calculated Field Dialog

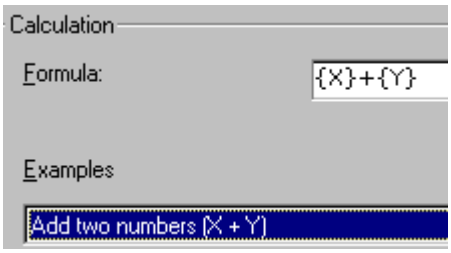
Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;"'{}[]|\`~) into this field. *See Also:* "The Name Field's Default Value" on page 189

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 **Indexed** field may or may not appear, depending on how your administrator has set up your system.
Display name	Enter the text that appears when a user hovers the cursor over this field.
Calculation	Use this area of the screen to define the calculation that this field will perform.
Formula	Enter the calculation that this field will perform. *See Also:* "Using the Formula Field" on page 207
Select Field	Click this button to select a field to reference in the calculation. For more information, see "Using the Formula Field" on page 207.
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 **Formula** 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. *See Also:* "Explanation of Examples" on page 209
Validation	Select the kind of validation to apply to this field. Your choices are: • **No validation** - the user's response is not checked • **Non-negative number (required)** - the result of the calculation must be a positive number • **Custom -** You can create custom validation. For more information, see "Custom Validation" on page 224. If you assign to this field any value other than **No validation**, the field is surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criteria, the field remains surrounded by red dashes. Your system administrator determines if a user can save a screen with invalid data.

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 CMS400.NET**'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 222

Using the Formula Field

You can copy a sample calculation into the **Formula** field by clicking the **Examples** field and selecting an operation from the drop down list. For example, if you click on **Examples Add two numbers (X+Y)**, **{X}+{Y}** appears in this field.



Next, replace the variables with fields on the screen. Be sure to select the curly brackets ({}) as well as the letter between them. Then, when the user enters data into those fields, the calculation is performed using the current field values.

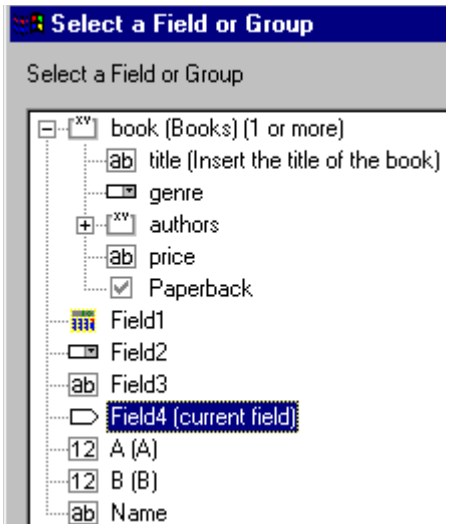
If a calculated field tries to perform a numerical calculation with a value that is blank or contains letters, `NaN` appears in the field. (`NaN` stands for "not a number.")

If a calculated field tries to divide by zero, `Infinity` appears.

WARNING! If the user does not replace *all* variables with a field or a number, when the content is validated, validation will fail.

To do this, follow these steps.

1. Select the first variable to replace. To continue the example, select **{X}**.
2. Click the **Select Field** button. A screen appears listing appropriate fields on the Data Design screen.



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

WARNING! If a variable appears more than once in a formula (for example, `{X} * number( {X} <= {Y} ) + {Y} * number( {X} > {Y})`, you only need to replace the first occurrence it - **Ektron CMS400.NET** will replace the subsequent occurrences for you.

4. Continue replacing all variables in the formula.

Notes

- If an XML document contains several occurrences of a field that is referenced in a formula, the value is derived as follows:
  - When using the XPath functions `sum()` and `count()`, all values with the field name are considered. For example, a document includes three books whose prices are $10, $20 and $30. In this case, `sum`'s value is $60.
  - When using all other functions, the first value is used. For example, a document includes three books whose prices are $10, $20 and $30. If a calculation formula refers to `<price>`, its value is $10.

- You can replace a variable with a number instead of a field. For example, replace `{X} * {Y}` with `../price * 1.15`.
- The expression can be complex, such as `(round(Field1 * 0.80) + (1 div Field2)) - 2`.
- You can use a string expression that creates a text message. For example, to calculate a full name from its parts: `concat( title, ' ', givenname, ' ', familyname)`, which could produce "Dr. Jonathan Smythe".

Referencing Other Calculated Fields

A calculated field can only reference other calculated fields that appear before it in a document. For example, a document collects a series of numbers.

- One calculated field counts the number of numbers.
- Another totals their values.
- A third computes the average by dividing the total by the count.

In this example, you must place the third field below or to the right of the first two fields. Calculated fields that are defined later in a document do not appear in the Select Field or Group dialog.

Explanation of Examples

The following table explains the standard examples that appear in the **Examples** drop-down list of the Calculated Field dialog. Note that your system administrator can customize the list, so it may not match what is below.

Example Field Text	Example Field Formula	Description
Add two numbers	{X} + {Y}	Add the value in the first field (X) to the value in the second field (Y).
Subtract two numbers	{X} - {Y}	Subtract the value in the second field (Y) from the value in the first field (X).

Example Field Text	Example Field Formula	Description
Multiply two numbers	{X} * {Y}	Multiply the value in the first field (X) by the value in the second field (Y).
Divide two numbers	format-number({X} div {Y} ,'0.###')	Divide the value in the first field (X) by the value in the second field (Y).
Format as a percentage	format-number({X} div {Y} ,'#0%')	Determine what percentage one number (X) is of another (Y). For example, if {X}=10 and {Y}=100, the result of the calculation is 10%.
Absolute value of a number	{X} * (number({X} > 0)*2-1)	The number regardless of the sign (negative or positive).
Minimum of two numbers	{X} * number({X} <= {Y}) + {Y} * number({X} > {Y})	The smaller of two field values.
Maximum of two numbers	{X} * number({X} >= {Y}) + {Y} * number({X} < {Y})	The larger of two field values.
Zero if subtraction is negative	({X} - {Y}) * number(({X} - {Y}) > 0)	Subtract one number (Y) from another (X). If the difference is less than zero, insert zero.
Multiply by another number if checkbox is checked	`{X} * ( {Y} * number( {Z} ='true') + number( {Z} !='true'))`	X is a numeric field. Y is another numeric field to multiply by X if a checkbox is checked. Z is the checkbox. For example, {X}=2 and {Y}=3 • if the checkbox is checked, the result is 2 * 3, which is 6 • If the checkbox is not checked, the result is 2
Round a decimal number	round({X})	Rounds the number to the nearest integer. For example, `round(3.14)`. The result is 3.

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.

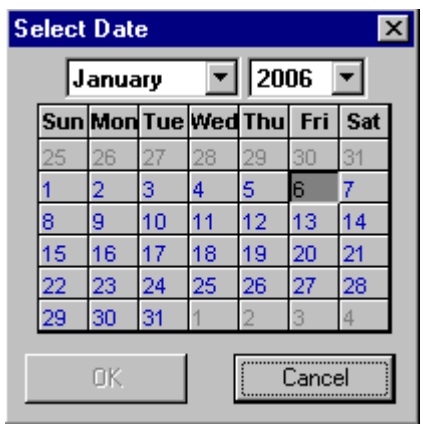
Example Field Text	Example Field Formula	Description
Total a list of numeric values	sum({X}[text()])	Total all values in a single repeating field. Here's an example. Plain Text Field properties Name: Miles Allow: more than one Validation: non-negative whole number XML Data <root> <Miles>89</Miles> <Miles>12</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 **Total a list of numeric values field** (above): Plain Text Field properties Name: Miles Allow: more than one Validation: non-negative whole number XML Data <root> <Miles>89</Miles> <Miles>12</Miles> <Miles>23</Miles> <Miles>19</Miles> </root> Average=89+12+23+19=143 divided by the number of values (4)= 35.75 Only elements that contain a value are summed. Empty elements are excluded.
Count the number of values in a list	count({X})	Calculate the number of values in a single repeating field. To continue the example from the **Total a list of numeric values field** (above): Plain Text Field properties Name: Miles Allow: more than one Validation: non-negative whole number XML Data <root> <Miles>89</Miles> <Miles>12</Miles> <Miles>23</Miles> <Miles>19</Miles> </root> Count = 4

Example Field Text	Example Field Formula	Description
Lowercase text	translate({X} ,'ABCDEFGHIJKLMNOPQRSTUVWXYZ','abcdefghijklmnopqrstuvwxyz')	Replace all uppercase characters with the lowercase version of that character
Uppercase text	translate({X} ,'abcdefghijklmnopqrstuvwxyz','ABCDEFGHIJKLMNOPQRSTUVWXYZ')	Replace all lowercase characters with the uppercase version of that character
Remove extra spaces	normalize-space({X})	Remove extra space characters from content\
Concatenate text	concat({X} , ' , ' , {Y})	Link text strings together into a single string. For example, `concat('The',' ','XML')` yields `The XML`.
Size of a text string	string-length({X})	Count the number of characters in a selected field's value. For example, if the referenced field's value is Hello, string-length = 5.

Calendar Field ( )

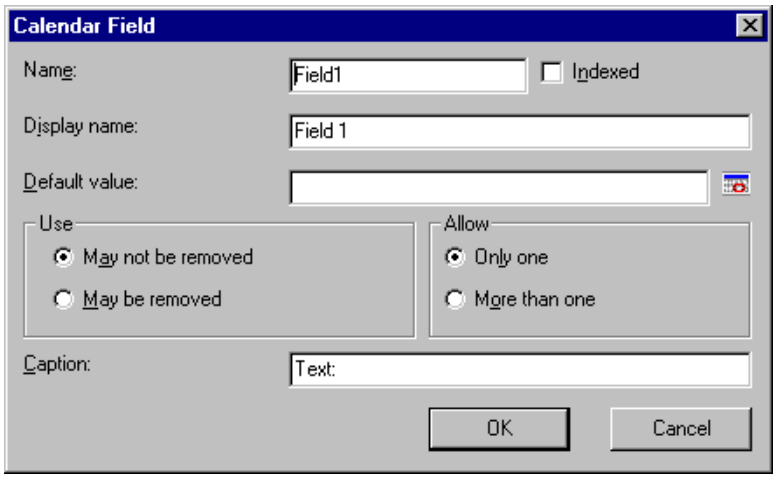
Insert a calendar field when you want the end user to enter a date. The user must click a date from an online, interactive calendar.



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

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

Dialog Box



Fields on the Calendar Field Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;"'{}[]|`~) into this field. *See Also:* "The Name Field's Default Value" on page 189
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.

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 220
Allow	See "The Allow Field" on page 221
Caption	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use **Ektron CMS400.NET**'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 222

Image Only Field ( )

Use an ImageOnly field to place an icon on the screen, which the user in Data Entry mode can click to insert an image into the Web content. You can insert a default image if desired.

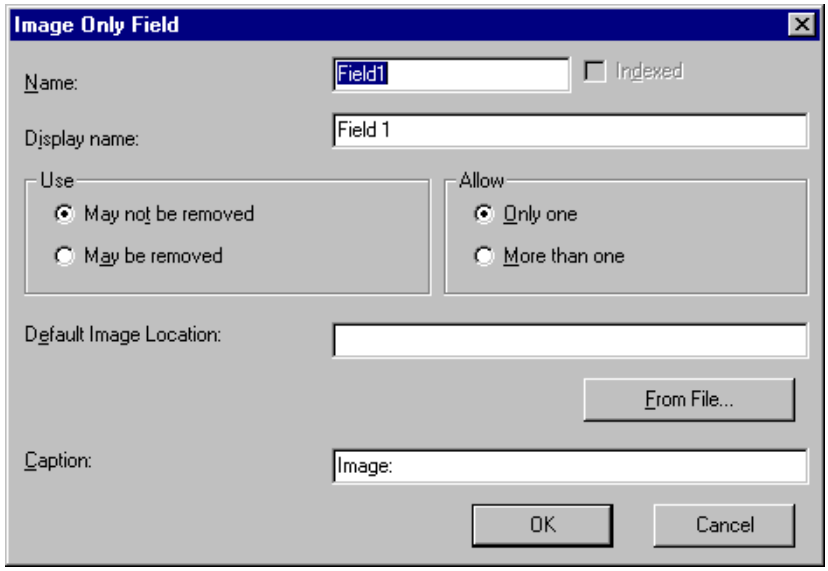
To let the user insert any file, such as a Microsoft Word document, use a File Link field. *See Also:* "File Link Field ()" on page 218

Using an Image Only Field in Data Entry Mode

In Data Entry mode, the image's caption appears, followed by a default image (if you specify one) and this icon: .

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



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 189
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.

Field	Description
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 220
Allow	See "The Allow Field" on page 221
Default Image Location	If desired, you can insert a default image, which might be the most common image or simply a reminder that an image needs to be inserted. To help find the image, click the **From File** button and navigate to image file. You can only insert an image file whose extension appears between the `<validext>` tags in the configdatadesign.xml file. For example: `<validext>gif,jpg,png,jpeg,jpe,doc,txt </validext>`

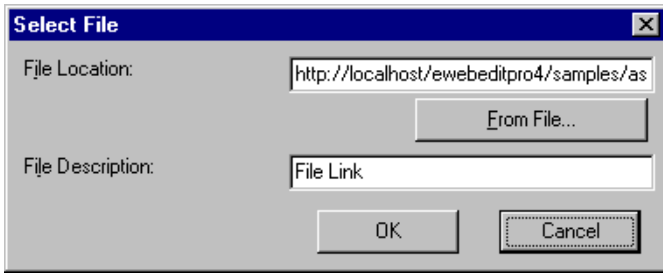
File Link Field ( )

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 216)

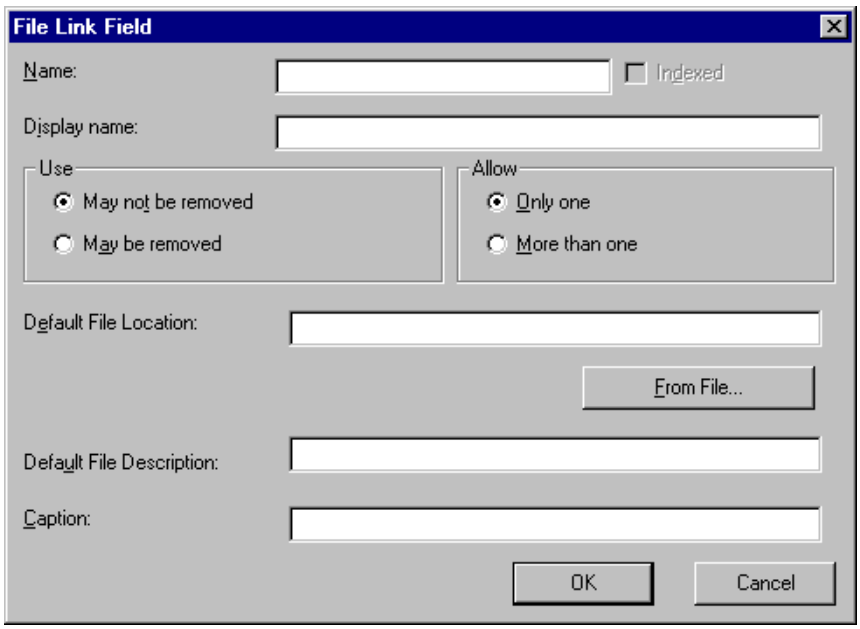
Using a File Link Field in Data Entry Mode

In Data Entry mode, the file link field's caption appears, followed by this icon: . When the user clicks 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.



Dialog Box



Fields on the File Link Field Dialog

Field	Description
Name	Enter the name of the field. Note that you cannot enter spaces nor most special characters (!@#$%^&*()+=<>,.:;'"{}[]|\`~) into this field. *See Also:* "The Name Field's Default Value" on page 189

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 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 220
Allow	See "The Allow Field" on page 221
Default File Location	If desired, you can insert a default link, which can be the most common link or simply an example. To help find the link, click the **From File** button and navigate to file. You can only insert a file whose extension appears between the `<validext>` element of the configdatadesign.xml file. For example: `<validext>gif,jpg,png,jpeg,jpe,pdf,doc </validext>`
Default File Description	If desired, enter text that the user will be able to click on to access the linked file.
Caption	Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use **Ektron CMS400.NET**'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.
Data Style	See "The Data Style Field" on page 222

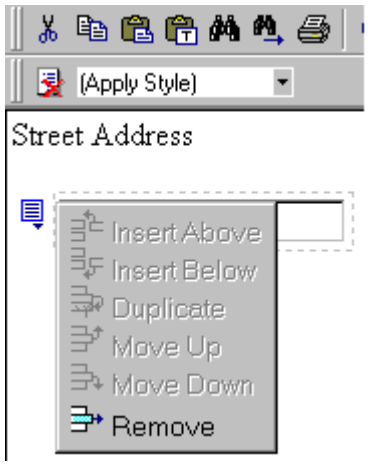
Fields that Appear on Several Dialogs

The Use Field

Click **May not be removed** if this field must be included on the screen. Otherwise, click **May be removed**.

If you check **May be removed**, when this field appears on a data entry screen, an icon ( ) appears to the left of the field.

If the user clicks the icon, a dropdown menu provides an option to remove the field, as shown below.



If the user removes the field, add *field display name* replaces the field on the data entry screen to indicate that the field was removed and can be added if necessary.

For example, if the field's display name is street address, and the user removes the field, add Street Address appears in place of the field.

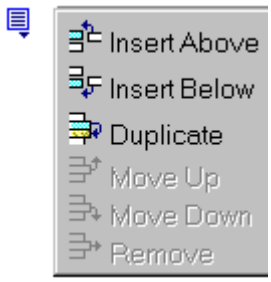
NOTE The menu icon ( ) can also indicate that the user can add instances of a field (see the Allow field, below). So, if a field is required, the icon could appear but omit a **Remove** option.

The Allow Field

Check **more than one** if you want to let the user entering data add instances of this field. Otherwise, check **only one**.

For example, if a screen is collecting names and addresses and you want to let the user enter several of them, check **more than one**.

If you check **more than one**, when this field appears in Data Entry mode, appears to the left of the field, as shown below.



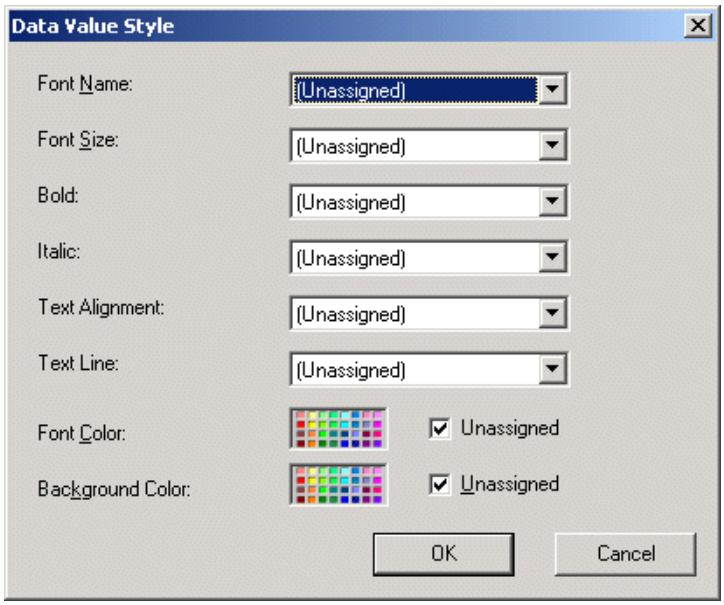
If the user entering data clicks , a menu appears (shown above), which lets the user add instances of the field to the screen.

NOTE The menu icon ( ) can also indicate that the user can remove a field (see the Use field, above). So, even if a field allows only one instance, the icon could appear but the menu would only display **Remove**.

The Data Style Field

WARNING! In the Application Setup screen, your system administrator can decide whether the styles you select below are removed when the content is saved. Check with your administrator before applying styles that may be removed.

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

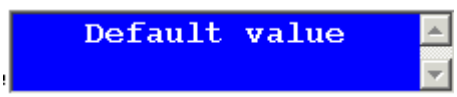


Use the dialog to assign the following formatting attributes to a user response field.

- 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

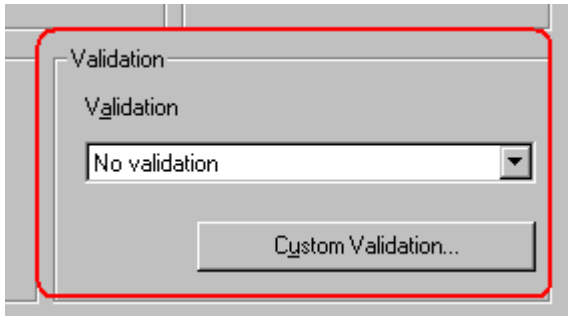
NOTE The configuration data controls a command's appearance on the toolbar and on the Data Style dialog. For example, if `<button command="cmdfontname" />` is removed from configdatadesign.xml, it disappears from the toolbar and the Data Style dialog.

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).



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.)

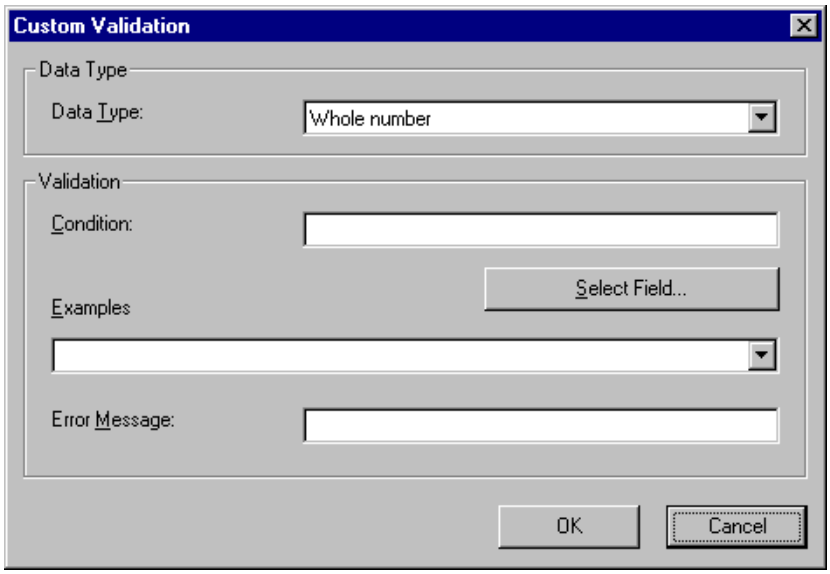
NOTE Your system administrator may customize the choices.

- 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.

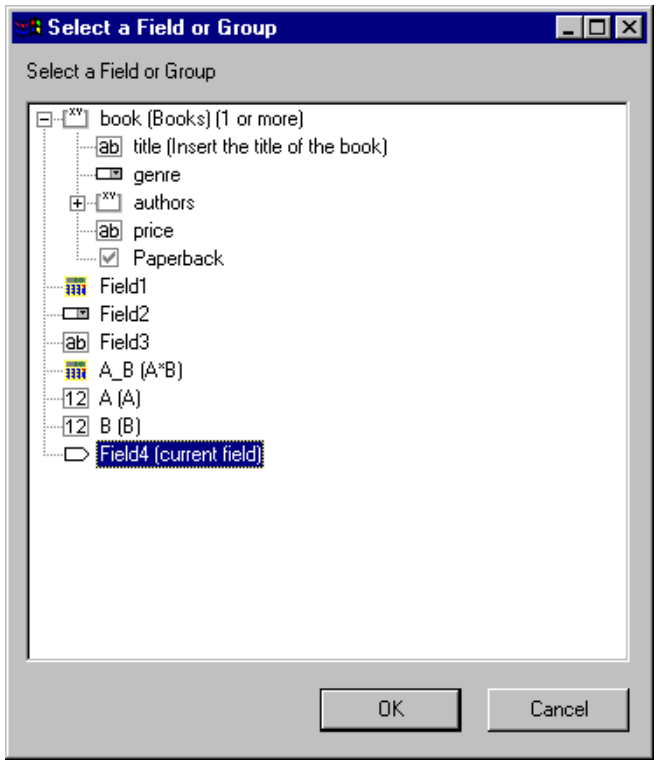
If the user's response fails to meet the criteria, you can compose an error message that appears when the data does not satisfy the criterion. Your system administrator determines if a user can save the invalid data.

When the **Custom Validation** button is clicked, the Custom Validation dialog appears.

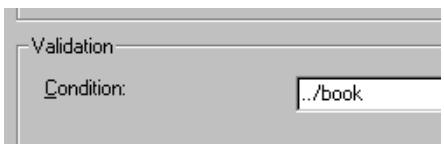


- The **Data Type** field is the value's basic type, for example, text number or URL.
- The **Condition** field displays the validation logic.
- The **Examples** drop-down list shows validation expressions that the data design creator can apply to the field.
- Any **Error Message** displays in Data Entry mode when the user inserts an invalid value.

When the **Select Field** button is clicked, the Select a Field or Group dialog appears.



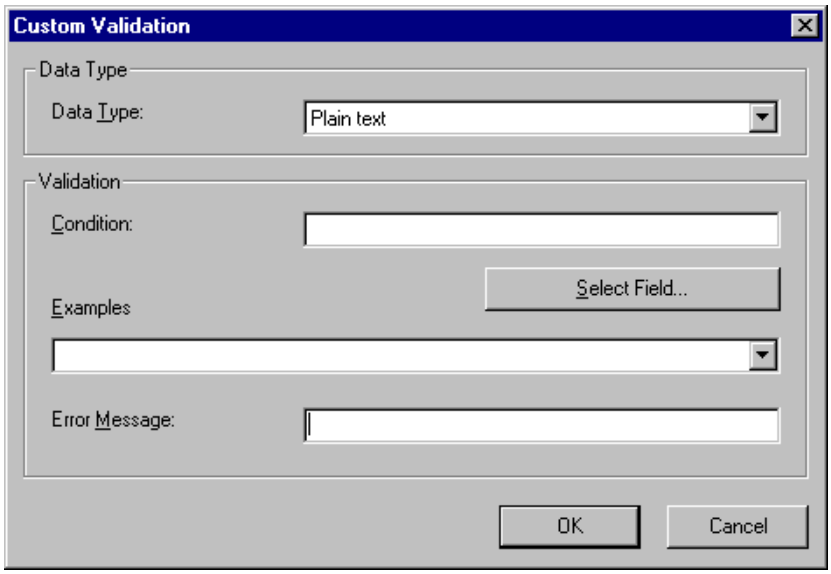
This dialog displays fields that can be inserted into the **Condition** field. Some field types, like the RichArea field, are not listed. *See Also:* "Referencing Other Calculated Fields" on page 209



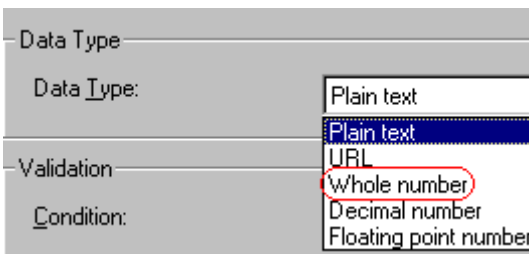
Example of Creating Custom Validation

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.

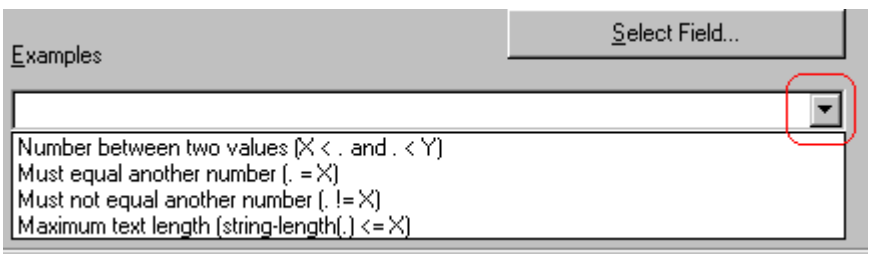
1. Click the Plain Text Field dialog and complete the screen.
2. In the validation section, click **Custom Validation**. The Custom validation screen appears.



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

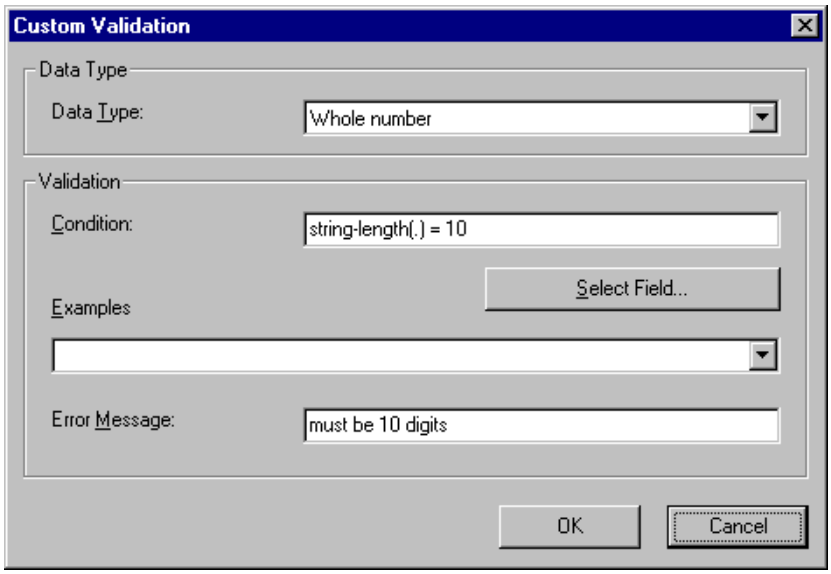


4. Click the down arrow to the right of the **Examples** field to see sample logic.



5. Click **Maximum text length...**. This option lets you specify the length of the user's response.
6. `string-length(.) <= {X}` appears in the **Condition** field.

7. Since you want the user's input to equal 10, remove the less than sign (<) from the calculation. Now it looks like this: `string-length(.) = {X}`.
8. Replace the X with 10. Now, it looks like this: `string-length(.) = {10}`.
9. Move the cursor to the **Error Message** field and compose a relevant error message. For example: `must be 10 digits`.
10. Your screen should look like this.



11. Press **OK** and return to the **Plain Text** field dialog.
12. Press **OK** to save that dialog and test the validation on the phone number field. To do this, switch to Data Entry mode and enter more or fewer than 10 digits, as well as non-digit characters to verify that validation works as expected.

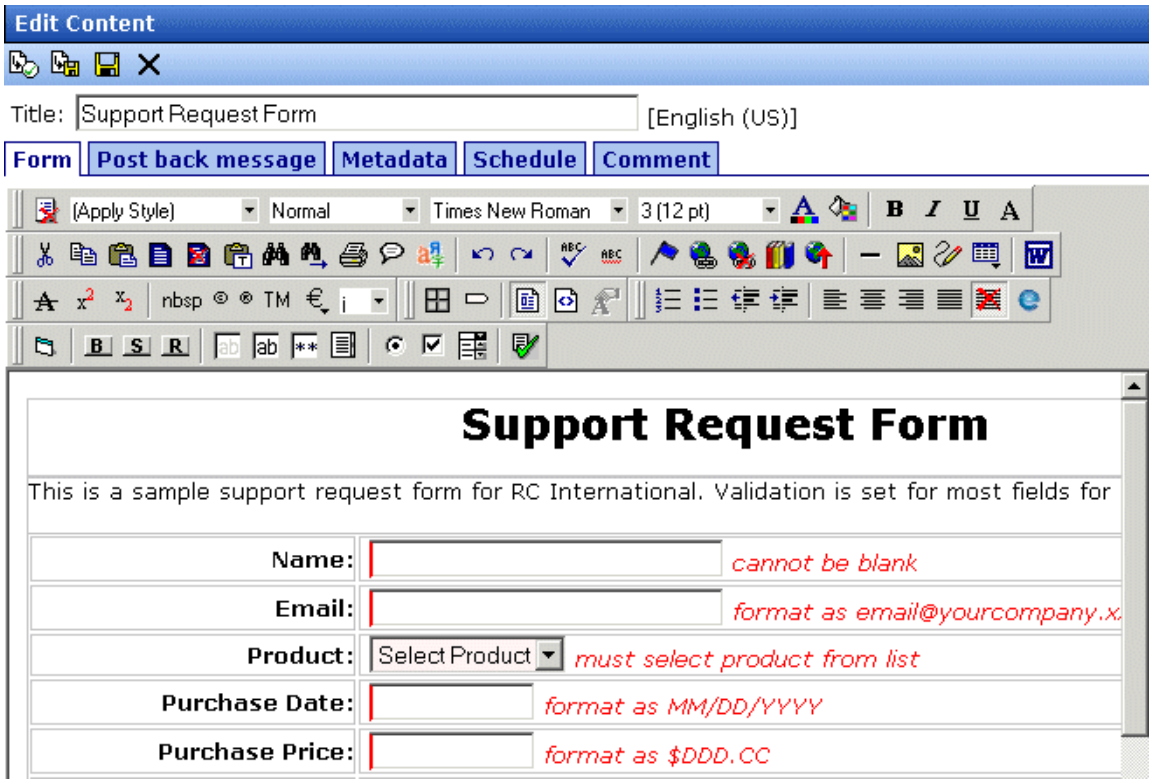
Working with HTML Forms

Ektron CMS400.NET 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.

Additional form capabilities include

- Creating a form and its postback message
- Adding validation criteria to form fields
- Reporting on form information
- Exporting results to Microsoft Excel

A sample form appears below.



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

- "Overview of Form Processing" on page 231
- "The Structure of Form Data" on page 231
- "Form Permissions" on page 234
- "Preparing the Server to Send email" on page 235
- "Accessing the Forms Folder" on page 235
- "Form Module Toolbar" on page 236
- "Creating a New Form" on page 237
- "Creating a Form's Content Block" on page 240
- "Implementing a Form on a Web Page" on page 245
- "Sending Data as XML" on page 247
- "Form Validation" on page 254

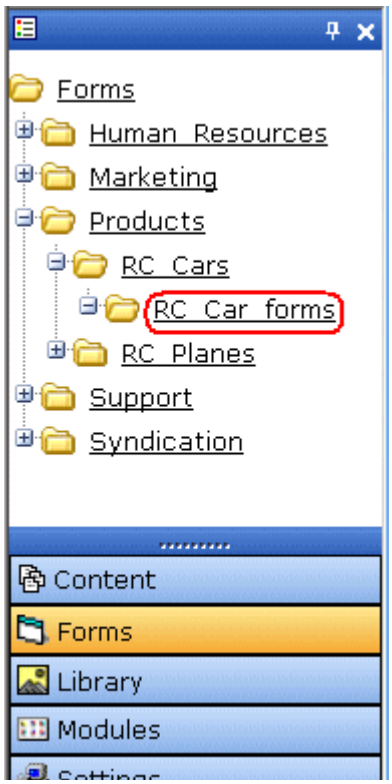
- ”Viewing Form Reports” on page 257
- ”Exporting Form Reports” on page 258
- ”Viewing Form Information” on page 259
- ”Editing a Form” on page 261
- ”Deleting a Form” on page 262

Overview of Form Processing

Step	For more information, see
1. Navigate to a Forms folder	”Accessing the Forms Folder” on page 235
2. Create a form	”Creating a New Form” on page 237
3. Create a form content block	”Creating a Form’s Content Block” on page 240
4. Insert fields into the content block	”Inserting Form Elements” on page 240
5. Assign the form content block to a template	”Implementing a Form on a Web Page” on page 245
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 257

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).

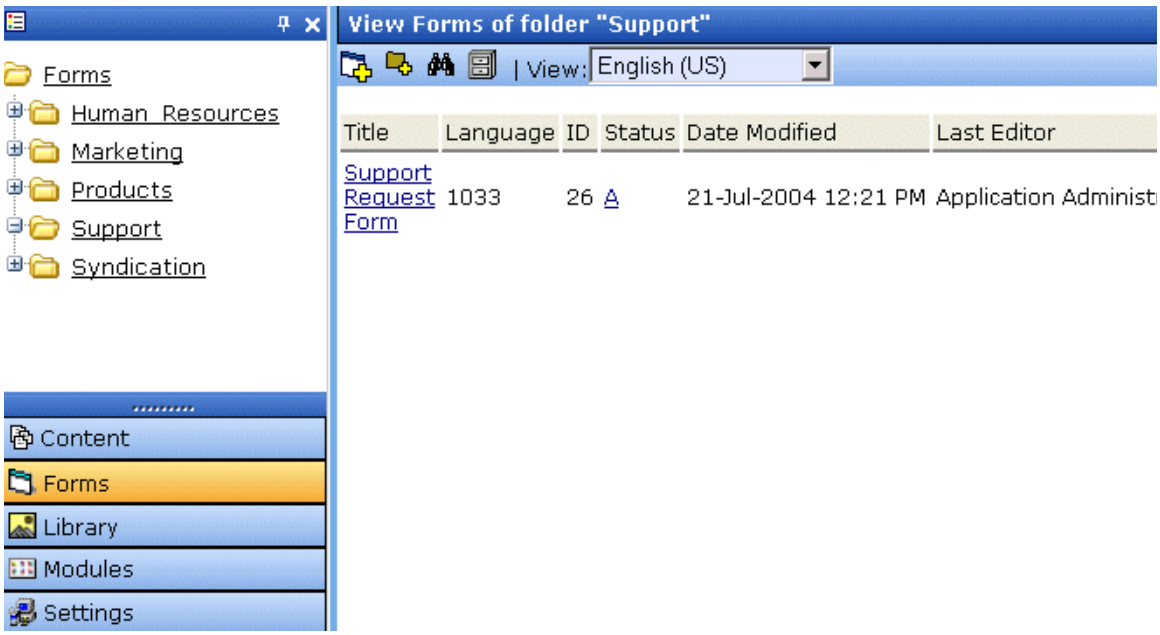


A form consists of the following components:

- **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 corresponding content folder to assign permissions and an approval chain. *See Also:* "Form Permissions" on page 234

Mailto or Database Form

The Forms feature 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 237 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 CMS400.NET 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 88.

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

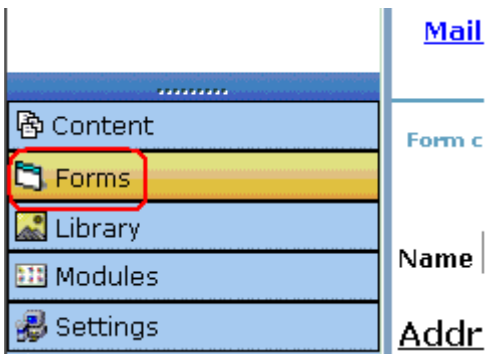
Since e-mail generated by forms is created on and sent from the server that hosts Ektron CMS400.NET, the server must be enabled to handle those responsibilities. To configure your Web server to send e-mail, refer to Configuring e-mail Notifications in the Ektron CMS400.NET Setup Manual.

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 CMS400.NET** on a public site that includes the CMS300 sample site with the form.aspx 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.



3. The Forms screen 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
	Edit Content	Edit the form's content block, which contains the form fields	"Editing a Form's Content Block" on page 261
Post Back Message or Summary	Edit Summary	Edit the summary assigned to a form's content block	"Editing a Form's Summary" on page 262
Metadata	Edit Metadata	Edit the metadata assigned to a form's content block	
	View Staged/ Published Content	Click **View Staged** button to view content that has not yet been published. Click **View Published** button to view content that is live on the Web site.	
	View History	View (and possibly restore) older versions of a content bock	"Content History" on page 64
	View Difference	Compare two versions of a content block	"Comparing Current and Previous Content Blocks" on page 68
	Edit Form Properties	Access Edit Form screen to change information about the form	"Editing a Form" on page 261
	Delete Form	Delete a form	"Deleting a Form" on page 262
	Check Links	Check for other content blocks that contain a link to this form	"Link Checking" on page 65
	Add Task	Add a task	"Managing Tasks" on page 270
	View Task	View task information	

Button or Tab	Name	Description	More Information
	Add Form	Add a new form	"Creating a New Form" on page 237
	Export Report	Download form data to a Microsoft Excel spreadsheet	"Exporting Form Reports" on page 258
	View Reports	View submitted form data; can select range of dates	"Viewing Form Reports" on page 257
or Form Properties	View Content Properties	Access view properties for the content block	"Viewing a Form's Content Block Properties" on page 261
View (language)	View	If you can view forms in more than one language, select a language from the drop down list.	
Add **-select language-**	**Add** **-select language-**	Lets you copy current form into new block and translate it to selected language.	"Translating a Content Block" on page 318

Creating a New Form

To create a new form, follow these steps.

NOTE You can also create a new edition of a form in another language by copying an existing form and translating it. For more information, see "Translating a Content Block" on page 318.

1. Access the Forms folder, as described in "Accessing the Forms Folder" on page 235.
2. 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.
3. From the language drop-down, select the language in which to create the form.

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 173.

4. Click the Add Form button ( ).
5. The Add Form screen appears.
6. 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 **mailto**, **database**, or both. See "Mailto or Database Form" on page 233	No
Mail Properties These fields are used in the email that is generated when a mailto form is submitted. To let the user override any value while completing the form, see "Letting the User Override email Values" on page 239.		
To:	e-mail address to which the form will be sent	Yes
From:	e-mail address to appear in the email's **From:** 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 247	No

7. Click the Save 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 240.

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 240 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 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.

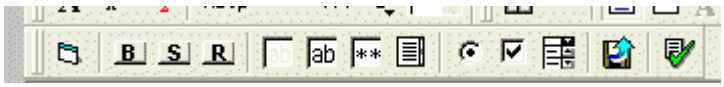
When a user is completing the form and inserts an email address into the field you inserted in Step 5, that field value is used in the email.

Creating a Form's Content Block

When you create a form, **Ektron CMS400.NET** 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.

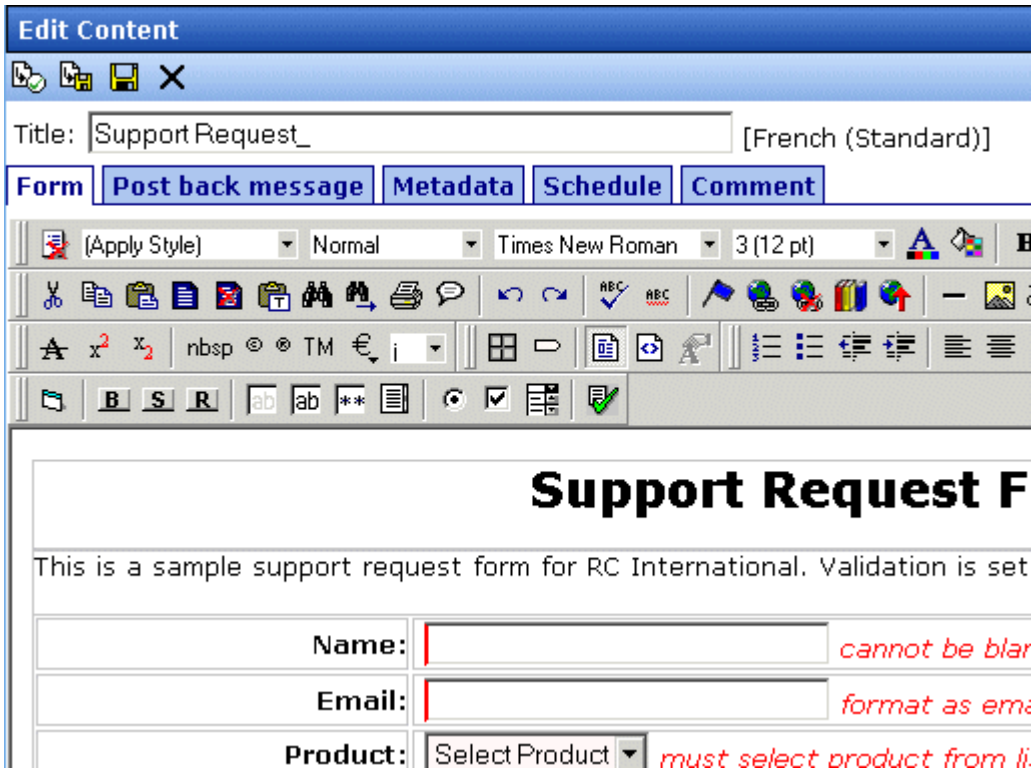
Creating a form content block is similar to creating a standard content block. (See "Adding HTML Content" on page 49). The big difference is a special toolbar (illustrated below) to facilitate the insertion of form elements.



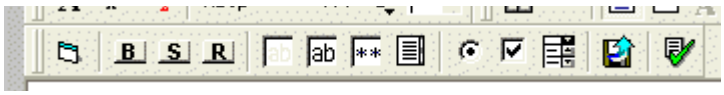
Inserting Form Elements

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

1. Access the form you created in "Creating a New Form" on page 237.
2. lick the Edit button ( ).
3. The Edit Content window opens.



4. If desired, edit the form title.
5. Enter the form's fields. By default, the form elements toolbar appears.



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
	Form	`<form name="Test" action="http://localhost/ewebeditpro4/formtest.htm" method="post"></form>` Note: If this content block is associated with a form, this button is not needed.	• Name • Action page • Method • Encode Type

Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
	Button	`<input type="button" value="Test Button" name="Test" />`	• Name • Value
	Submit Button	`<input type="Submit" value="Submit Button" name="Submit" />`	• Name • Value
	Reset Button	`<input type="reset" value="Reset Page" name="Reset"/>`	• Name • Value
	Hidden Text Field	`<input type="hidden" value="This is initial content" name="mycontent" />`	• Name • Value
	Text Field	`<input size="15" value="This is initial content" name="mycontent" />` Note: See "Letting the User Override email Values" on page 239 for information about overriding default Forms settings.	• Name • Value • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.
	Password	`<input type="password" size="5" value="" name="mypassword" />`	• Name • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
	Test Area	`<textarea name="mycontent" rows="5" cols="4" type="textarea">This is initial content</textarea>`	• Name • Value • Rows • Columns
	Radio Button	`<input type="radio" checked="checked" value="This is a radio button" name="mybutton" />`	• Name • Value Default is Checked

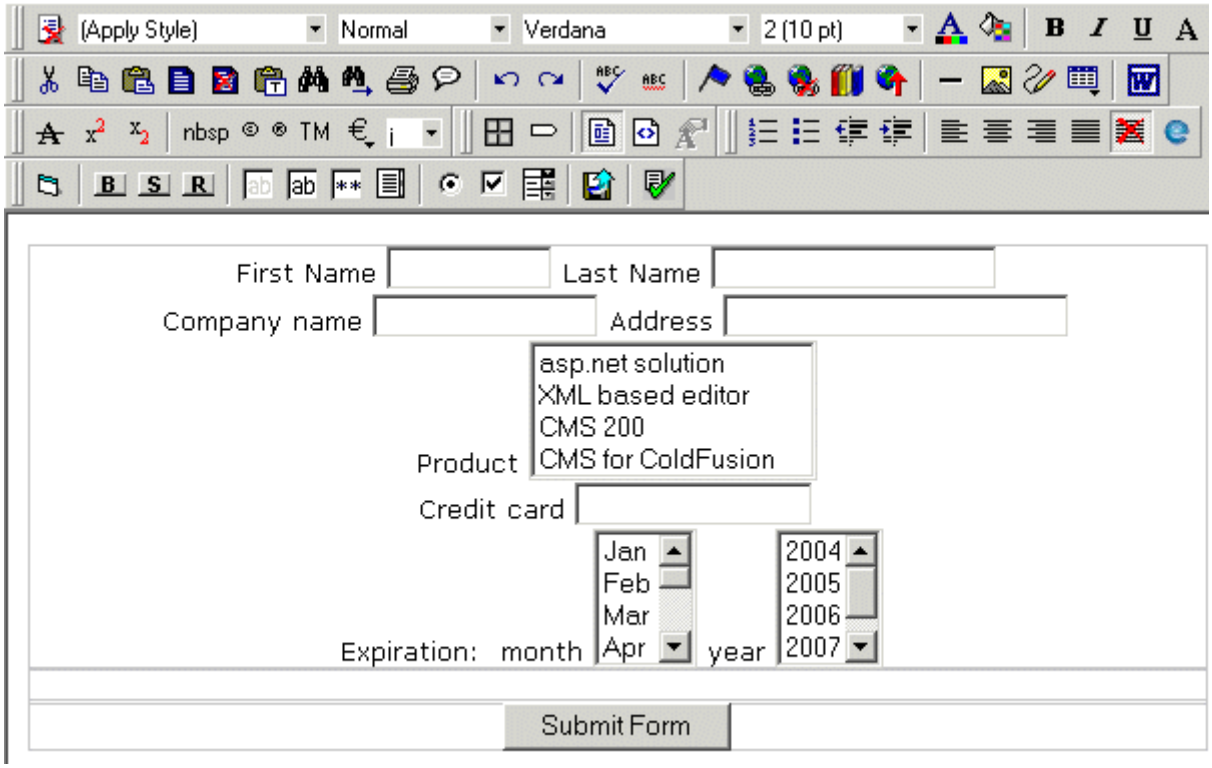
Button	Inserts this kind of field	Example of HTML inserted	Prompts on dialog box that appears
	Check Box	`<input type="checkbox" checked="checked" value="This is a check box" name="mycheckbox" />`	• Name • Value Default is Checked

	Select	`<select multiple="multiple" size="25" name="myselectbox">`
		
		`<option value="option1">option1</option>`
		
		`<option value="option2">option2</option>`
		
		`</select>`
			• Name
			• Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
			• Allow multiple
			• Option name
			• Display value

	File Upload field and browse button	`<input type="file" size="10" name="Save" />`	• Name • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
	Form Validation	Applies a validation rule to selected form element. *See Also:* "Form Validation" on page 254	

6. Move the cursor to the screen position where you want the first field.
7. Click the button corresponding to the kind of field you want to insert.
8. Complete the dialog box that collects information about the field.

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



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 254.

9. After you complete the form, you have the following options.

Button orTab	Description
Postback Message	Edit the summary for content block. If you want to customize the post back message, click the **Summary** 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 include images, files, hyperlinks, etc.
Metadata	Edit the metadata for content block *See Also:* "Metadata" on page 79

Button orTab	Description
Schedule	Assign start or end dates, or both, for when content is published to Web site *See Also:* "Scheduling Content" on page 63
Comment	Enter history comment to indicate changes made to content
Submit	Submit content block into 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. 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.
Cancel	Close the editor without saving changes.

10. 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

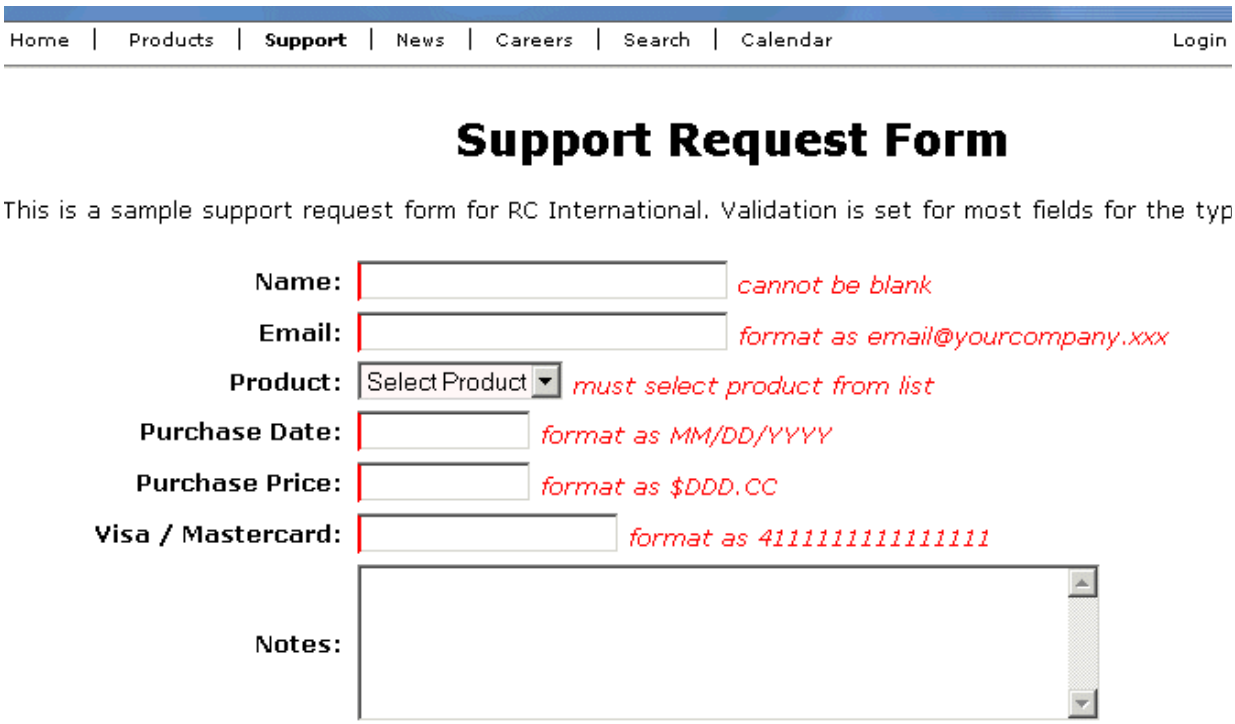
After you create a form, the next step is to implement it on a Web Page. To do that, follow these steps.

NOTE The use of functions to manage templates is documented in the Ektron CMS400.NET Developer's Manual.

1. Open the web template on which you want the Form content block to appear. (This example uses support.aspx.)
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.aspx template.



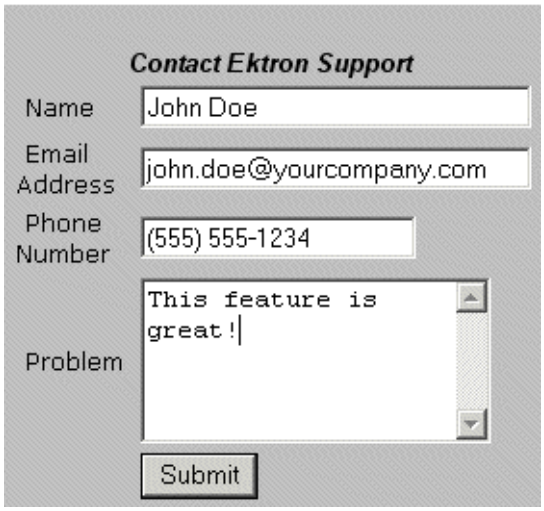
3. Save and close the template file.
4. To test your form, navigate to your Web site then to that page.
5. Complete the form.
6. Click the Submit Form button.
7. The screen is refreshed and displays the post back message that you created.

Sending Data as XML

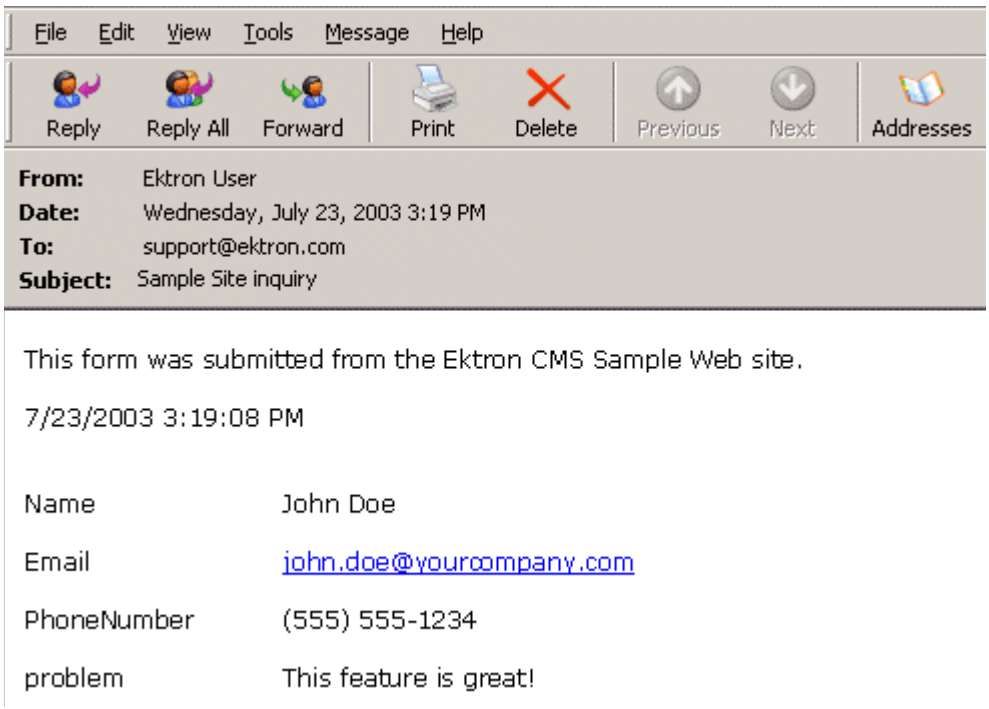
While creating a form that generates email, you can specify that the e-mail be sent as XML data or plain text. (See ”Creating a New Form” on page 237 for information about setting this option.)

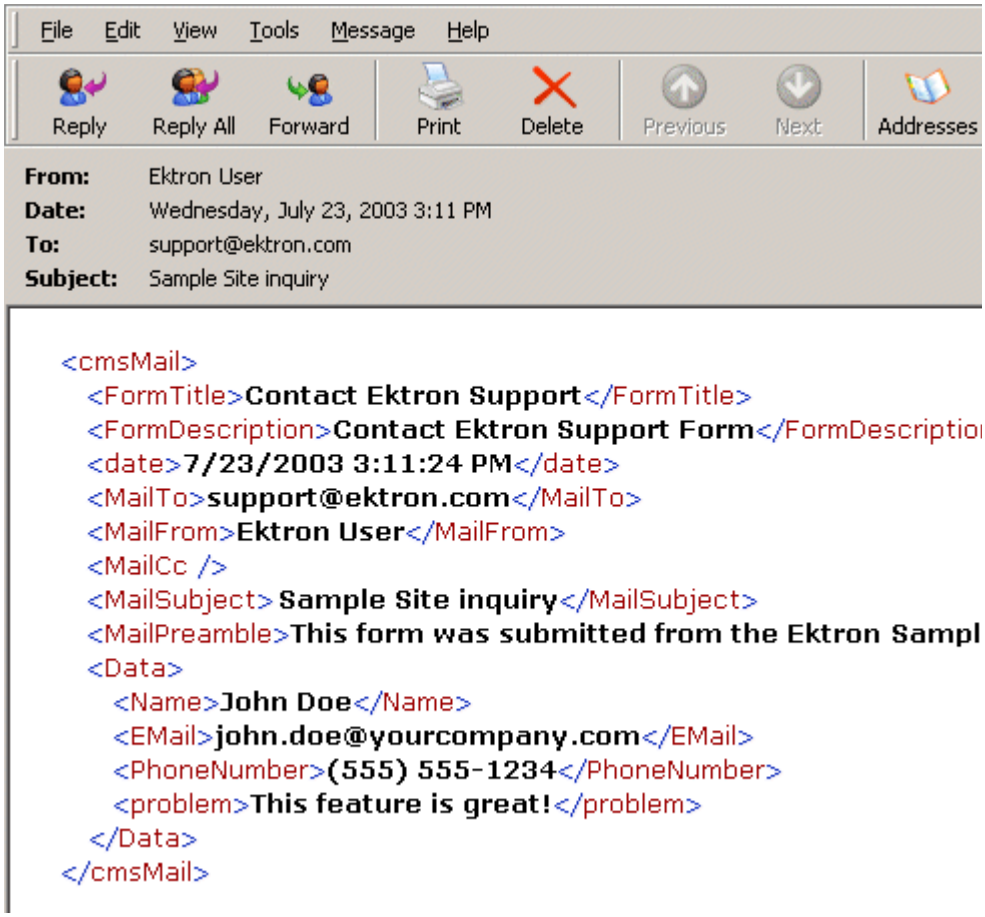
Because XML data is structured, you can easily parse the content to store and retrieve important information. Also, if you download the form data to an Excel spreadsheet, the XML tags become the spreadsheet’s column headers. *See Also:* ”Exporting Form Reports” on page 258.

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.



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

Form sent as	Generated e-mail
Plain Text	

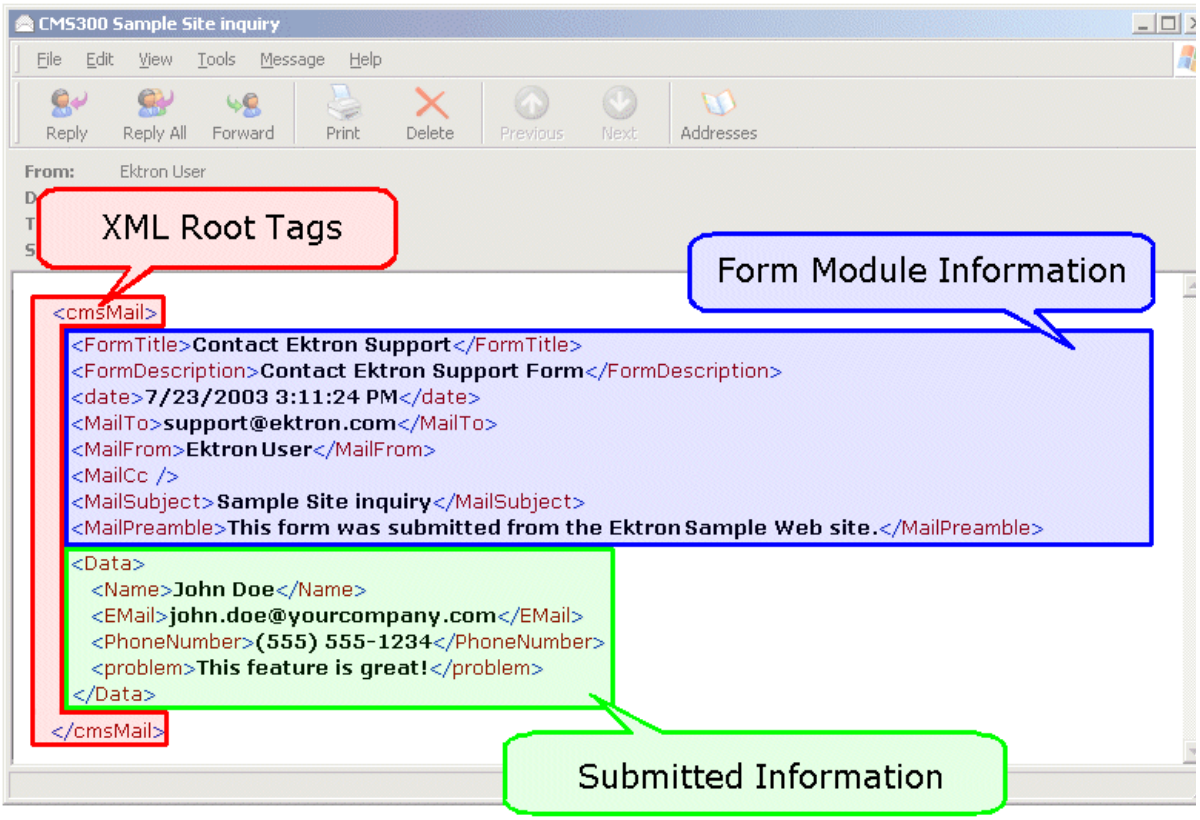
Form sent as	Generated e-mail
XML	

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.

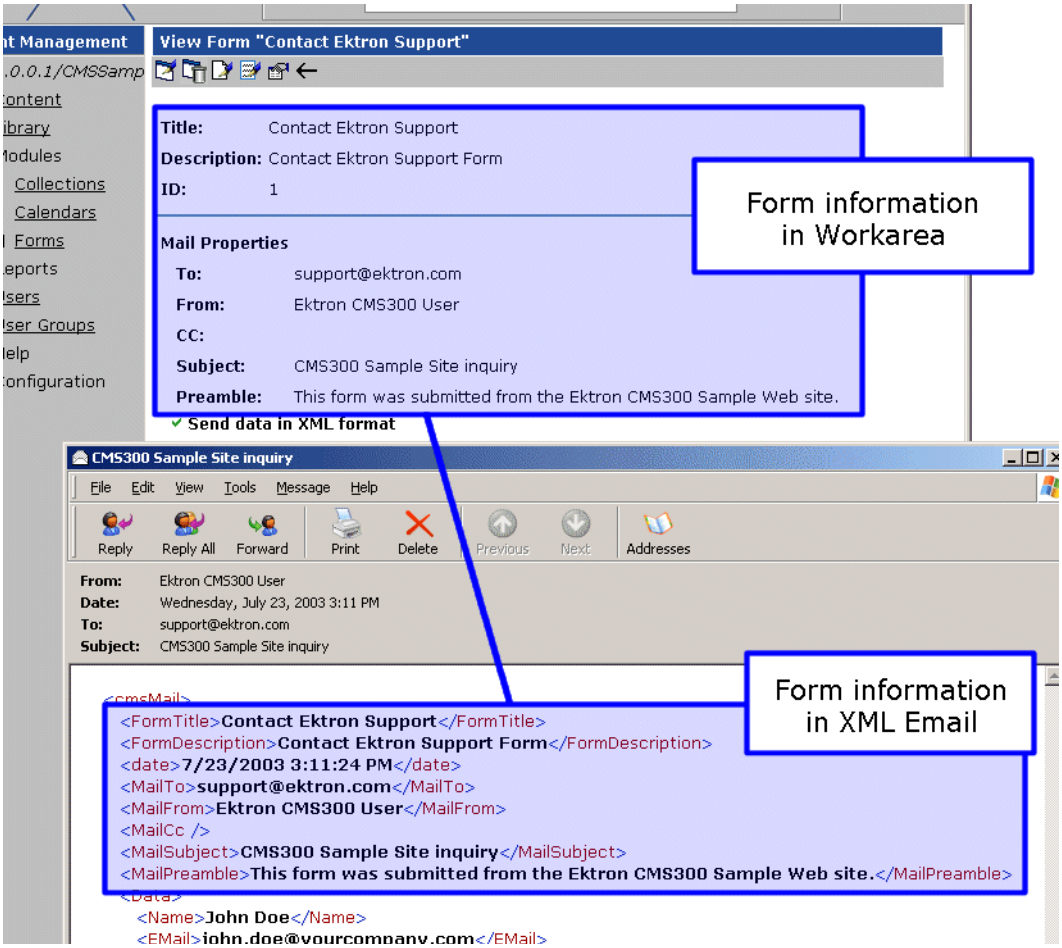
Root Tag

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.

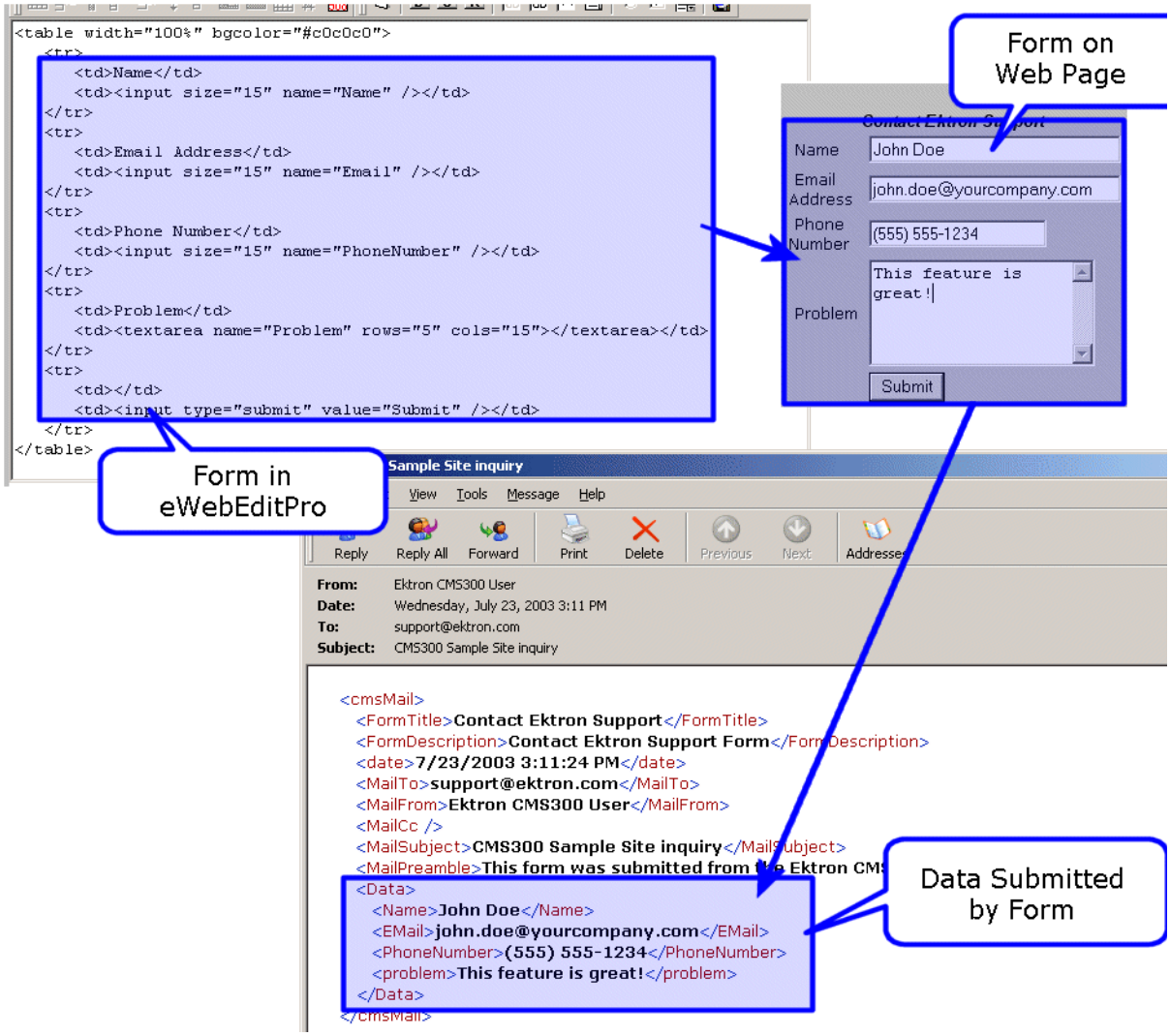
XML Tag	Description
<FormTitle>	Title given to the form that was submitted.
<FormDescription>	Description given to the form that was submitted.
<date>	Date and time the form was submitted.
<MailTo>	To e-mail address(es) defined in the form.

XML Tag	Description
<MailFrom>	From e-mail address(es) defined in the form.
<MailCc>	CC address(es) defined in the form.
<MailSubject>	Subject for the generated e-mail defined in the form.
<MailPreamble>	Preamble for the generated e-mail defined in the form.

Data Tags

The 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

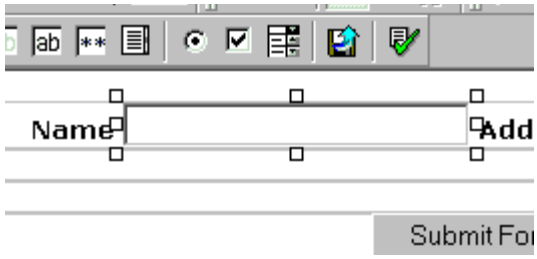
Validation rules are applied when a user submits a form, not when the input is entered. If invalid input is found, the error message that you define appears.

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.

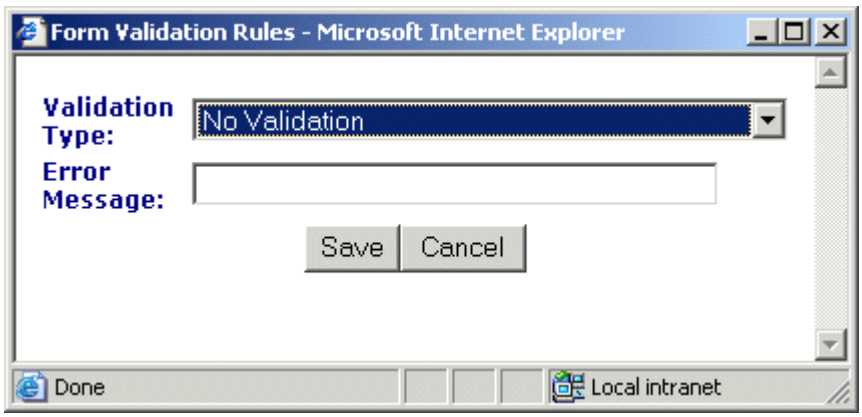
Steps for Applying Validation Rules to a Form Field

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 240.
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.



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



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	• Text field • Text area field • Select list field	No validation is applied	

Validation Rule	Can be applied to...	When applied, data in the field must...	Valid Examples...
Cannot be blank	• Text field • Text area field	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	*VISA*: **4111 1111 1111 1111** (16 digits) *MC*: **5500 0000 0000 0004** (16 digits) *AMEX*: **340000000000009** (15 digits) *DC*: **30000000000004** (14 digits) *DIS*: **6011000000000004** (16 digits)
Social Security Number	Text field only	Be a valid social security number	123-45-6789 123456789
U.S. Postal Codes (2 Letter state)	Text field only	Be valid U.S. state postal code	NH MA
U.S. Zip Codes	Text field only	Be a 5 digit U.S. zip code, or zip+4.	12345 12345-6789
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.	999999999 123456789
Number of Characters	Text area only	Adhere to the max/min settings specified.	
Cannot be first option	Select list only	Not be the first option on the selection list	

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

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 235.
2. Navigate to the folder for which you want to view the report.
3. The Form Modules screen appears.
4. Click the form you want to view.

5. The View Form screen appears.
6. Click the View Reports button ( ).
7. The View Forms Report screen 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 screen for the report you want to export, as described in ”Viewing Form Reports” on page 257.
2. Click the Export Reports button ( ).
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.

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 235.
2. Click the form you want to view.
3. The View Form screen 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 231
Content Properties	Displays the properties of the form's content block
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

Field	Description
Start Date	Date and time when the content block will go live on the Web site (if set for a future date)
End Date	Date and time when the content will be removed from the Web site (if set for a future date)
Date Created	Date and time when content block was created
Mail Properties	The form's mail properties link
To	Email address to which the form is sent when submitted. *See Also:* "Letting the User Override email Values" on page 239
From	Text that appears in the email's **From** field. *See Also:* "Letting the User Override email Values" on page 239
CC	Text that appears in the email's **CC** field. *See Also:* "Letting the User Override email Values" on page 239
Subject	Text that appears in the email'ssubject field. *See Also:* "Letting the User Override email Values" on page 239
Preamble	Beginning text of the email. *See Also:* "Letting the User Override email Values" on page 239
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 247
Form Content	Content block associated with the form
Post Back Content	Summary of content block associated with form. This content is displayed when form is submitted.

The view form screen also contains several buttons to perform actions. To learn about the buttons, see "Form Module Toolbar" on page 236.

Viewing a Form's Content Block Properties

From the View Form screen, you can see the View Form's Content Block properties screen. From this screen, you can see additional information about the content block that does not appear on the View Form screen. To view the properties for a form's content block, follow these steps.

1. Navigate to the View Form screen of the form whose properties you want to view, as described in "Viewing a Form's Content Block Properties" on page 261.
2. Click the View Content Properties button ( ).
3. The View Content Proprties screen 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 screen for the form you want to edit, as described in "Viewing a Form's Content Block Properties" on page 261.
2. Click the Edit Form button ( ).
3. The Edit Form screen 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 floating toolbar on the Web page
- Editing the content by the View Form screen
- Accessing the content by the View Form content properties screen

This section explains how to edit a form's content block from the View Form screen. To edit a form's content block, follow these steps.

1. Access the View Form screen for the content block, as described in "Editing a Form's Content Block" on page 261.
2. Click the Edit content button ( ).
3. The Edit Content screen 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 screen of the form whose summary you want to edit, as described in "Viewing a Form's Properties" on page 259.
2. Click the Edit Summary tab.
3. The Edit Summary screen 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 screen for the form you want to delete, as described in "Accessing the Forms Folder" on page 235.

2. Click the Delete Form button ( ).
3. A confirmation message is displayed.
4. Click **OK**.

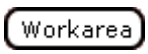
Ektron CMS400.NET Help

The help folder in the administrator workarea is a center of important and useful information about using Ektron CMS400.NET. The help folder provides you with a centralized location of the manuals as well as a link to the Ektron CMS400.NET Online help screen.

To access the help folder

1. Access 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 manuals appears.

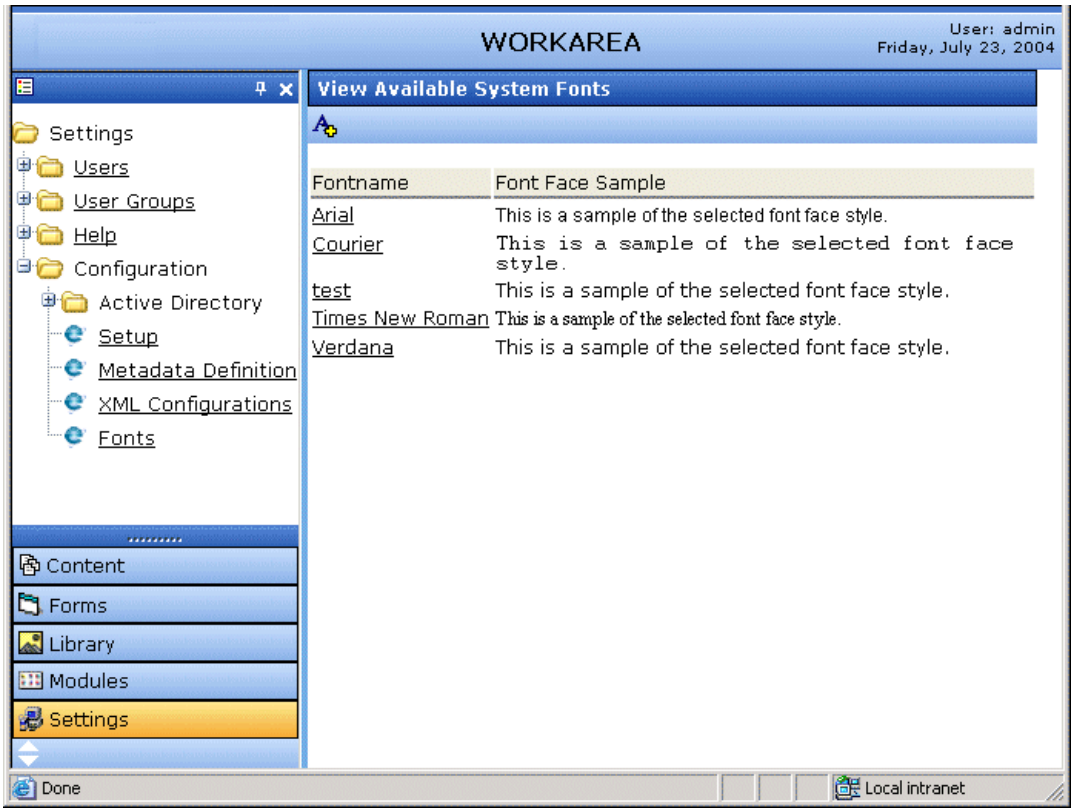
5. Click a link to open the manual or Web page.

Font Manager

As an administrator, you can add, edit, and delete fonts to and from the Ektron CMS400.NET 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.

Minimizing the number of available fonts makes the Web site look more uniform.

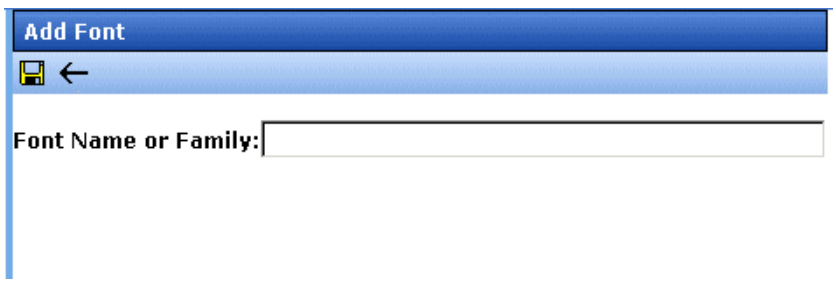
Below is the Font Manager in the Administrator Workarea.



Adding Fonts

To add a font to the application, follow these steps.

1. From the left frame of the Workarea, click **Settings > Configuration > Fonts**.
2. Click the Add Font button ( ).
3. The add font screen is displayed.



4. Enter the font name or family into the text field provided.
5. Click the Save button (.)

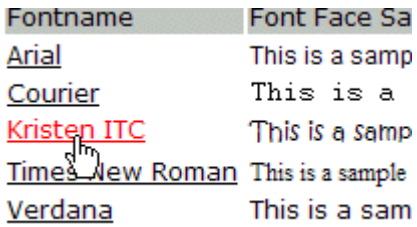
The new font is available to use when adding or editing content.

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 267.
2. Click the font you want to view.



3. The view font screen is displayed.

Edit Fonts

When you edit a font, the font or family name is changed. Editing does not change any fonts in existing content blocks.

To edit a font name, follow these steps.

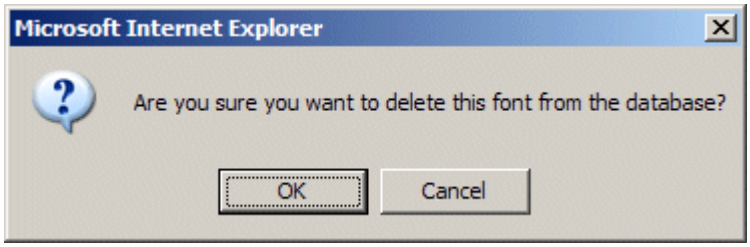
1. Access the view font screen, as described in "Viewing Fonts" on page 267.
2. Click the Edit button ( ).
3. The Edit Font screen is displayed.

4. Edit the font name or family in the text field specified.
5. When finished, click the Update button ( ).

Delete Fonts

By deleting a font from the system, you are taking away the content contributors' use of that font in their content blocks. To delete a font, follow these steps.

1. Access the view font screen, as described in "Viewing Fonts" on page 267.
2. Click the Delete button ( ).
3. A message is displayed.



4. Click **OK** to delete the font.
5. The screen is refreshed, and the updated fonts table is displayed.

When you delete a font from Ektron CMS400.NET, you do not delete it from your computer.

Managing Tasks

NOTE Much of the Task functionality is documented in the **Ektron CMS400.NET** Users Manual > "Managing Tasks" section. As an administrator, you should familiarize yourself with this information.

Tasks are typically assigned to content blocks to help you monitor and manage changes to your Web site. Within Ektron CMS400.NET, users can assign tasks to themselves and 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 a content block
- Tasks assigned to a content block

A standard Ektron CMS400.NET 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 270
- "Task Permissions" on page 271
- "Task States" on page 272
- "Email Notification" on page 279
- "Archiving a Task" on page 280
- "Deleting a Task" on page 281
- "Purging a Task" on page 282

The Tasks Folder

The tasks folder in the Smart Desktop contains all tasks in the Web site.

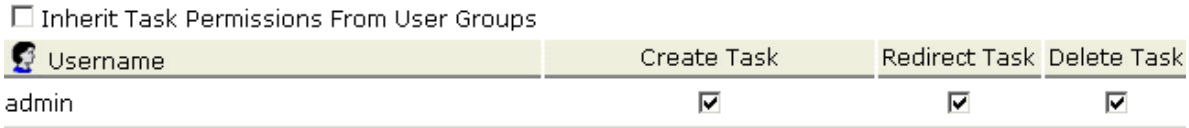
Task Permissions

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.

Only administrator level users can edit these fields in the User profile. Non-administrative users can see but not edit them.



Assigning Group Permissions

A user 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** 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.

Assign Unique Task Permissions

To assign unique task permissions to a user, regardless of permissions assigned to groups of which he is a member, uncheck the **Inherit Task Permissions From User Groups** box on the Edit User screen.

Task States

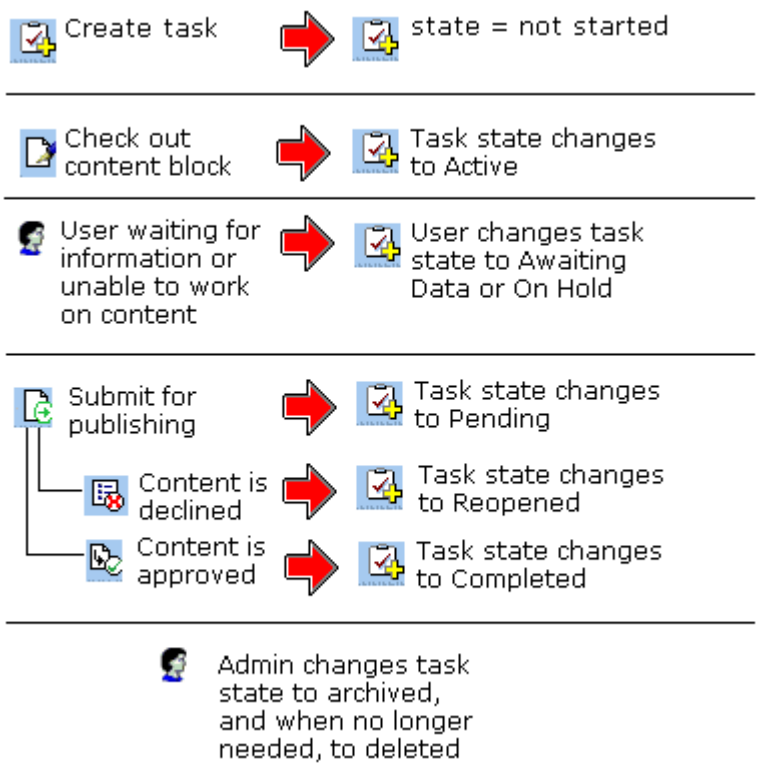
During the life of a task assigned to a content block, it normally progresses through a series of states. The state helps track a task's progress from creation to completion and even removal from the database. When reviewing the history of a task, the state can be used to review which actions changed 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	Assigned when task is created.	Yes	No

State	Description	Assigned by User?	Assigned by System?
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. 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
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. *See Also:* "Archiving a Task" on page 280	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. *See Also:* "Deleting a Task" on page 281 When you purge the task, it and all of its transactions are removed from the database. *See Also:* "Purging a Task" on page 282	Yes (user with delete permission can delete; only admin can purge)	No

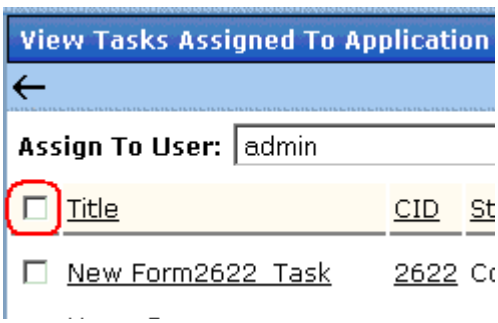
Restrictions on the Task Flow Process

- Only users with archive and delete permissions can set the task's status to archived or deleted. This can be done at any stage of the task flow process.
- Notes can be entered for the task at any time.
- An administrator can assign a task to any state at any time.

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 270.

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 redirect your tasks to another user. To select all tasks on a screen, click the check box in the header row (illustrated below).



Folder	Displays these tasks	Action you can perform from view screen
Tasks	Open tasks assigned to yourself, and open tasks you have assigned to other users.	• Create a new task • Delete a task • View a task • • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
All Open Tasks	All open tasks (that is, tasks in one of these states) for all users • not started • active • awaiting data • on hold • reopened • pending	• Edit a task • • Sort tasks by column
Assigned To Me	All open tasks assigned to you	• Assign tasks to a different user • View a task • • Sort tasks by column
Assigned By Me	All open tasks you assigned to yourself or others	• Assign tasks to a different user • View a task • • Sort tasks by column
Created by Me	All open tasks you created	• View a task • • Sort tasks by column
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 **Assign to User** drop down list and click **Get Tasks**. • View a task • • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
Not Started	All whose state is Not Started *See Also:* "Task States" on page 272	• Change to any other state • View a task • • Sort tasks by column
Active	All whose state is Active	• Change to any other state • View a task • • Sort tasks by column
Awaiting Data	All whose state is Awaiting Data	• Change to any other state • View a task • • Sort tasks by column
On Hold	All whose state is On Hold	• Change to any other state • View a task • • Sort tasks by column
Pending	All whose state is Pending	• Change to any other state • View a task • • Sort tasks by column
Reopened	All whose state is Reopened	• Change to any other state • View a task • • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
Completed	All whose state is Completed	• Change to any other state • View a task • • Sort tasks by column
Archived	All whose state is Archived	• Change to any other state • View a task • • Sort tasks by column
Deleted	All whose state is Deleted	• Change to any other state • Purge tasks • View a task • • Sort tasks by column

Determining Which Tasks a User Can View

To provide security, **Ektron CMS400.NET** 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 †	**X**				
Assigned by Me		**X**	**X**		

<table>
<tr><th>View option</th><th>Administrator group member</th><th>User or group to whom task assigned</th><th>User who assigned task</th><th>User who created task</th><th>All users</th></tr>
<tr><td>Assigned to Me †</td><td></td><td>X</td><td></td><td></td><td></td></tr>
<tr><td>Created by Me †</td><td></td><td></td><td></td><td>X</td><td></td></tr>
<tr><td>Assigned to User</td><td>X</td><td>X</td><td>X</td><td>X</td><td>X</td></tr>
<tr><td>Not Started</td><td rowspan="10">all tasks in specified state
|
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|
V</td><td rowspan="9">only tasks assigned to user in specified state
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|
V</td><td></td><td></td><td></td></tr>
<tr><td>Active</td><td></td><td></td><td></td></tr>
<tr><td>Awaiting data</td><td></td><td></td><td></td></tr>
<tr><td>On hold</td><td></td><td></td><td></td></tr>
<tr><td>Pending</td><td></td><td></td><td></td></tr>
<tr><td>Reopened</td><td></td><td></td><td></td></tr>
<tr><td>Completed</td><td></td><td></td><td></td></tr>
<tr><td>Archived</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Deleted</td><td></td><td></td><td></td><td></td></tr>
</table>

† - user can only view open tasks, that is, not started, active, awaiting data, on hold, pending, or reopened

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.

Archiving a Task

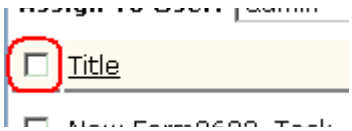
After a task is completed, you may want to change its state to Archived. Archiving moves selected tasks from the Completed tasks list to the archived list. This change cleans up the completed tasks list and makes it and easier to use.

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.



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.

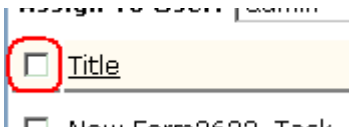
Deleting a Task

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 274.

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.



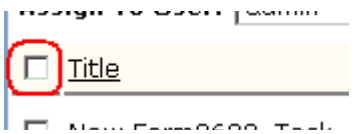
4. Next to the **Change to State** field, click the down arrow to display the drop down list and select **Deleted**.
5. Click the Set button.

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.

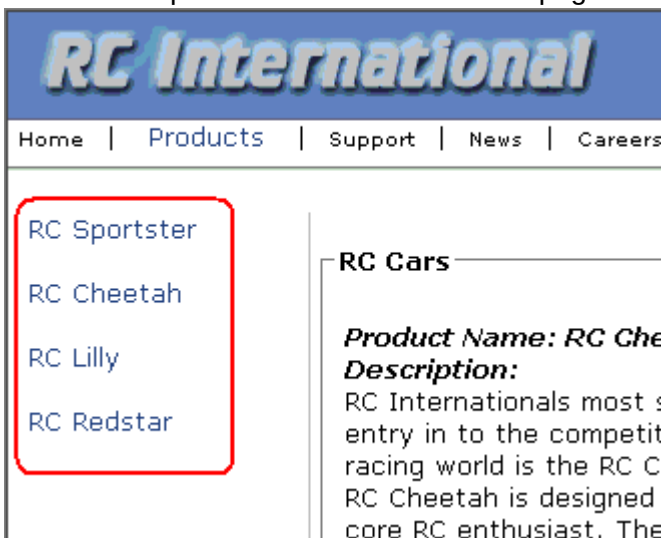
1. From the Smart Desktop, click the Tasks folder.
2. Click the Deleted view option.
3. Select tasks one at a time, or click the check box on the top left corner to select all.



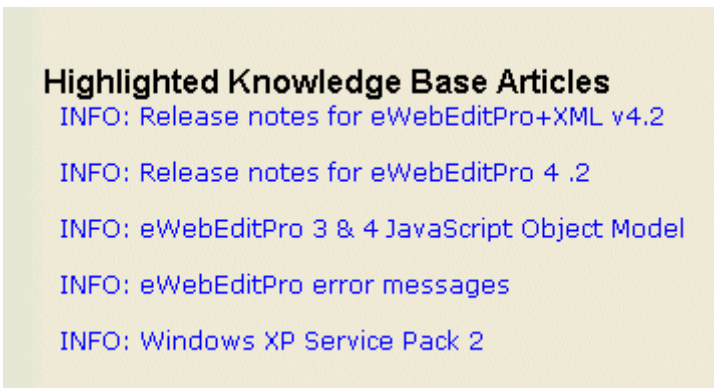
4. Click the Purge button.

Collections

Ektron CMS400.NET's Collection feature lets users create a list of content blocks that can be placed on a Web page to offer readers links to them. In the following illustration, the circled content is an example of a collection on a Web page.



Collections can also be used to display listings such as job postings, press releases, and Knowledge Base articles. The following graphic illustrates the use of a collection on the landing page of Ektron's Knowledge Base.



This section only describes managing permissions to use the Collections feature. For more information about the Collections feature, see the **Ektron CMS400.NET** User Manual section “Working with Collections.”

Collection Permissions

Permissions for collections are set in the content folder permissions table, in the advanced permissions section. *See Also:* ”Setting Permissions” on page 85

Menu Feature

Ektron CMS400.NET'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 sub-menus.

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 CMS400.NET** 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.

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 CMS400.NET** Developer Manual section “Ektron CMS400.NET Server Controls” > “List of Server Controls” > “Menu Server Control”.

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 Screen

To access the calendar report screen, follow these 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 screen 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 screen.	”Viewing Calendar Modules” on page 303
	Save	Save a calendar or calendar event being added or edited.	
	Show Calendar	Displays the calendar in the workarea.	”View Calendar” on page 304

Button	Name	Description	More Information
	Manage Event Types	Add, edit, and delete Event Types to and from a calendar.	
	Add Calendar Event	Accesses the add calendar event screen in the workarea.	
	Edit	Edit a calendar or calendar event.	
	Delete	Delete a calendar or calendar event.	"Deleting Calendar Modules" on page 306
	Add Calendar Event	Access the add calendar event screen from the calendar on the Web page.	"Adding Calendar Events" on page 307
	View Date	View all calendar events for a selected day.	"Viewing Calendar Events" on page 309

Adding a New Calendar Module

To add a new calendar, follow these steps.

1. Access the calendar modules screen, as described in "Accessing the Calendar Modules Screen" on page 288.
2. Click the Add Calendar button ( ).
3. The Add or Edit Calendars screen is displayed.

   The add calendar screen 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.

Section	Description
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 291 and "Calendar Permissions" on page 290 for additional information.

5. Click the Save button ( ).

   The calendar modules screen 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 88 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.

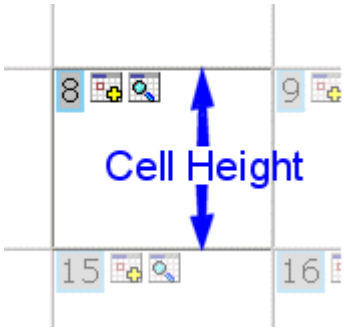
In order for a non-administrator user to add, edit, or delete calendar events, he must have add, edit, and delete permissions for the content folder with which the calendar is associated. *See Also:* ”Setting Permissions” on page 85

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.

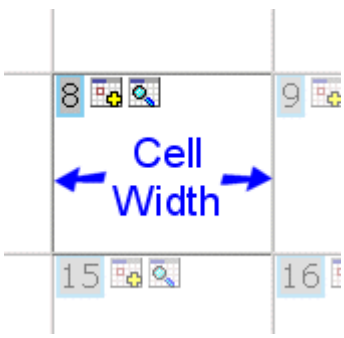
Cell Height

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), check this box.

Do Not Display Weekends

Calendar Style Sheet

The look and feel of the calendar, when displayed on a Web page, are controlled by a style sheet. By default, there are two style

sheets that define the styles for the calendars in Ektron CMS400.NET.

Style Sheet	Defines the styles for...
\CMS400.NETSample\ekcalendar.css	The calendar in the sample Web site template.
\CMS400.NETSample\CMS400.NETScripts\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.

Style Class/Element	Defines the style for...
td.ekcaldayrow	The calendar row that contains the days of the week.
td.ekcalmonthyear	The current month and year at the top of the calendar.
td.ekcalnextmonth	The links to move forward or back a month.
tr.ekcalfirstrow	The calendar's heading table row.
tr.ekcallastrow	The calendar's last row.
a	Anchor tags used throughout the calendar.
a:hover	Anchor tags, when the mouse is hovering over them, throughout the calendar.
a:active	Active anchor tags throughout the calendar.
.ekday	The numerical date displayed.
.ekeventendlabel	The end time label in a calendar event.
.ekeventlocationlabel	The location label in a calendar event.
.ekeventlocaton	The location line of the of the calendar event.
.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 CMS400.NET *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, follow these steps.

1. Access the View Calendar [Calendar Name] screen for the calendar you want to enable Event Types for as described in "Viewing Calendar Modules" on page 303.
2. Click the Edit button ( ).

   The Add or Edit Calendar screen 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] screen 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 CMS400.NET. 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, follow these steps.

1. Access the View Calendar [Calendar Name] screen for the calendar you want to view the Event Types for as described in ”Viewing Calendar Modules” on page 303.

NOTE If the Event Types button is not displayed in the toolbar at the top of the screen, you must first make Event Types available. See ”Enabling Event Types” on page 296 for more information.

2. Click Event Types button ( ).

   The View Event Types for [Calendar Name] screen is displayed with a list of currently added Event Types.

From this screen, 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, follow these steps.

1. Access the View Event Types for [Calendar Name] for the calendar you want to add an Event Type to as described in ”Viewing Available Event Types” on page 297.

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 ( ) to add an Event type.

   The Add or Edit an Event Type screen 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 screen 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 CMS400.NET users. See ”Assigning Event Types To Calendar Events” on page 299 for more information.

Editing Event Types

To edit an existing event type, follow these 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 297.

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 screen 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 ( ) to edit the Event Type.

   The Add or Edit an Event Type screen 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 screen is displayed with the new Event Type displayed.

Deleting Event Types

To delete an available event type from a calendar, follow these 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 297.
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 ( ) to delete the event type.

   The Delete Event Types screen 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 ( ) to permanently delete the Event Type.

   A confirmation message is displayed.
6. Click **OK.**

   The View Event Types screen 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, follow these steps.

1. Begin by either adding or editing a calendar event for a calendar as described in "Adding Calendar Events" on page 307 or "Editing Calendar Events" on page 309.
2. Make the necessary additions/edits to the calendar event screen.

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 ( ) to save the changes.

   The calendar event is saved and the previous screen 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, follow these steps.

1. Begin by either adding or editing a calendar event for a calendar as described in ”Adding Calendar Events” on page 307 or ”Editing Calendar Events” on page 309.
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 screen 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, follow these steps.

1. Begin by either adding or editing a calendar event for a calendar as described in ”Adding Calendar Events” on page 307 or ”Editing Calendar Events” on page 309.
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.
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 screen 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, follow these 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 are refreshed, and the calendar now displays only calendar events whose Event Type matches the selected filter.

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, follow these steps.

1. Access the calendar modules screen, as described in ”Accessing the Calendar Modules Screen” on page 288.
2. Click the title of the calendar you want to view.

   The View Calendar screen is displayed.

   The view calendar screen 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 CMS400.NET. This ID is used to call the calendar to a Web page.
Description	Descriptions given to the calendar.
Location Label	Label for the location data which is displayed when a location is specified for a calendar event.
Start Time Label	Label for the start time data which is displayed when the start time is displayed for a calendar event.
End Time Label	Label for the end time data which is displayed when the start time is displayed for a calendar event.
Cell Height	Height of all cells in the calendar.
Cell Width	Width of all cells in the calendar.
Display Weekends	A green check means the calendar displays the weekends. A red X means the calendar does not.

Field	Description
Event Types Available	A green check means the Event Type is available for the calendar type. A red X means the Event Type is not available for the calendar type.
Event Types Required	A green check means the user is required to select the Event Type when adding/editing a calendar event. A red X means the user is not required to select Event Type when adding/editing a calendar event.
Folder Name	Name of the content folder the calendar is associated with for permissions.
Folder Path	Complete folder path of the content folder the calendar is associated with.

The view calendar screen also contains several buttons to perform other actions.

The following table explains each of the displayed buttons.

Button	Name	Description	More Information
	View Calendar	Shows the calendar in the workarea.	"View Calendar" on page 304
	Edit	Opens the edit calendar screen allowing you to make changes to the calendar.	"Editing Calendar Modules" on page 305
	Delete	Allows you to delete the current calendar.	"Deleting Calendar Modules" on page 306
	Back	Return to the previous screen.	

View Calendar

Once a calendar has been added to Ektron CMS400.NET, you may view it at any time via Workarea using the view calendar button.

To view a calendar, follow these steps.

1. Access the view calendar screen, for the calendar you want to see, as described in ”Viewing Calendar Modules” on page 303.
2. Click the View Calendar button ( ).

   The Show Calendar screen 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 293 for more information.

From here, you can perform the following actions:

Button	Name	More Information
	Add Calendar Event	”Adding Calendar Events” on page 307
	View Calendar Events	”Viewing Calendar Events” on page 309
	Return to Previous Screen	Return to previous screen

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, follow these steps.

1. Access the view calendar screen for the calendar you want to edit, as described in ”Viewing Calendar Modules” on page 303.
2. Click the Edit button ( ) to edit the calendar module.

   The Add or Edit Calendar screen is displayed.
3. Make the necessary changes to the calendar using the following table as a reference.

NOTE See ”Table Properties” on page 291 for additional information.

4. Click the Save button ( ) to save your changes.

The View Calendar screen 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, follow these steps.

1. Access the view calendar screen, for the calendar you want to delete, as described in ”Viewing Calendar Modules” on page 303.
2. Click the Delete button ( ) to delete the calendar.
3. A confirmation message is displayed.
4. Click **OK**.

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, follow these steps.

1. Access the calendar you want to add a calendar event to as described in ”View Calendar” on page 304.
2. Navigate to the month and day you want to add the calendar event to.
3. Click the Add Event button ( ) on the day you want to add an event to.

   The Add Calendar Event screen 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	Displays the number of times an event will be added to the calendar when choosing a recurring event.

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 CMS400.NET 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 Add Content button ( ) to create a new content block that can be assigned to the calendar event.

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

Viewing Calendar Events

Once calendar events have been added to a calendar, you can easily view them.

To view a calendar event, follow these steps.

1. Access the show calendar screen, for the calendar that contains the event you want to view, as described in ”View Calendar” on page 304.
2. Navigate through the calendar until you find the event you want to view.
3. Click the View Date button ( ) on the date the calendar event occurs on.

   The View Events screen is displayed listing all calendar events for that date.

Adding a Calendar Event from the View Events Screen

To add a calendar event from the view events screen, perform the following steps.

1. Access the view calendar events screen, as described in ”Viewing Calendar Events” on page 309.
2. Click the Add Calendar Event button ( ).

   The Add Calendar Event screen is displayed.
3. Follow the steps described in ”Adding Calendar Events” on page 307 to complete the form.

Editing Calendar Events

Once a calendar event has been added for a calendar, you may edit it to change the title, location, times, etc.

To edit a calendar event, follow these steps.

1. Access the view calendar events screen, for the date that contains the event you want to edit, as described in ”Viewing Calendar Events” on page 309.
2. Click the title of the event you want to edit.

The Edit Calendar Event screen is displayed.

3. Make the necessary changes to the calendar event using the following table as a reference.

NOTE See "Table Properties" on page 291 for additional information.

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

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, follow these steps.

1. Access the view calendar events screen, for the date that contains the event you want to delete, as described in "Viewing Calendar Events" on page 309.
2. Click the title of the event you want to delete.

   The Edit Calendar Event screen is displayed.
3. Click the Delete button ( ) to delete the event.
4. A confirmation message is displayed.
5. Click **OK**.

The calendar event is removed from the calendar, and the View Calendar Events screen appears with the changes reflected.

Displaying Calendars on Web Pages

Once a calendar has been created by an administrator, it can easily be inserted into a Web page.

For information about inserting calendars in Web pages using the supplied Ektron CMS400.NET custom function, refer to the Ektron CMS400.NET *Developers Reference Manual.*

Multi-Language Support

There are several aspects to translating within **Ektron CMS400.NET**. They are listed below.

Type of Translation	Seen by	For more information, see
Content	Content contributors (when viewing or editing); visitors to your site	”Working with Multi-Language Content” on page 311
Spell check dictionary	Visitors to your site	”Set the Language of Spell Checking” on page 346
Special Character Encoding	Visitors to your site	”Character Encoding” on page 346

Working with Multi-Language Content

Ektron CMS400.NET 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 315). Then, for any content block, you can provide editions in each supported language.

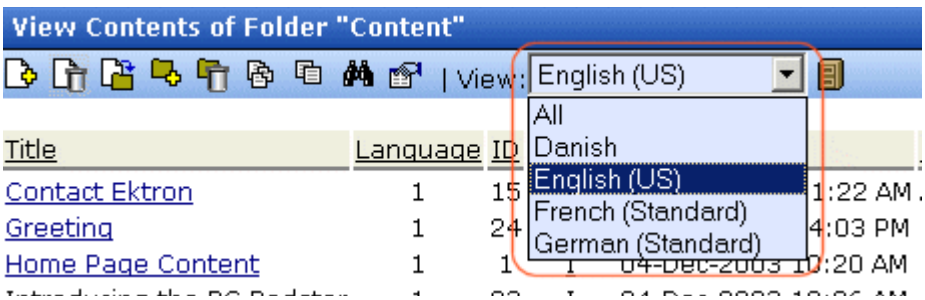
To provide multi-language content, you can either create a new content block or copy and edit an existing one. For example, you can begin the creation of a German content block by copying English content into it, then translating that content into German and deleting the English content.

All editions of a content block have the same ID number but are differentiated by the language attribute. As a result, your Web page template can link to a single content block, but what is displayed is determined by the selected language. There are two ways that a content block's language can be selected:

- a language cookie, which is created when a visitor enters your site and selects a language
- the link to another page includes the language (`langType`) parameter. For example, `mytemplate.aspx?LangType=1033`.

NOTE For a list of the decimal values for each supported language, see "Appendix A: List of Supported Languages" on page 485.

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 editions in a selected language.



The View Contents of Folder screen also displays the language of each content block. This helps you distinguish them when viewing all content blocks.

Finally, you can set up a separate approval chain for each edition of a content block, and can assign collections and tasks in any supported language.

This section describes how to work with a multiple language Web site through the following topics.

- "Enabling/Disabling Support for Multiple Language Content" on page 313

- ”Viewing Your Site in Another Language” on page 314
- ”Determining Which Languages are Available” on page 315
- ”The Default Language” on page 317
- ”Creating a New Content Block” on page 318
- ”Translating a Content Block” on page 318
- ”Multi-Language Approval Chains” on page 335
- ”Working with Tasks in a Multi-Language System” on page 336
- ”Working with Collections in a Multi-Language System” on page 336
- ”Working with Menus in a Multi-Language System” on page 336
- ”Setting Up a Multilingual Web Site” on page 337
- ”Resolving Conversion Issues” on page 341

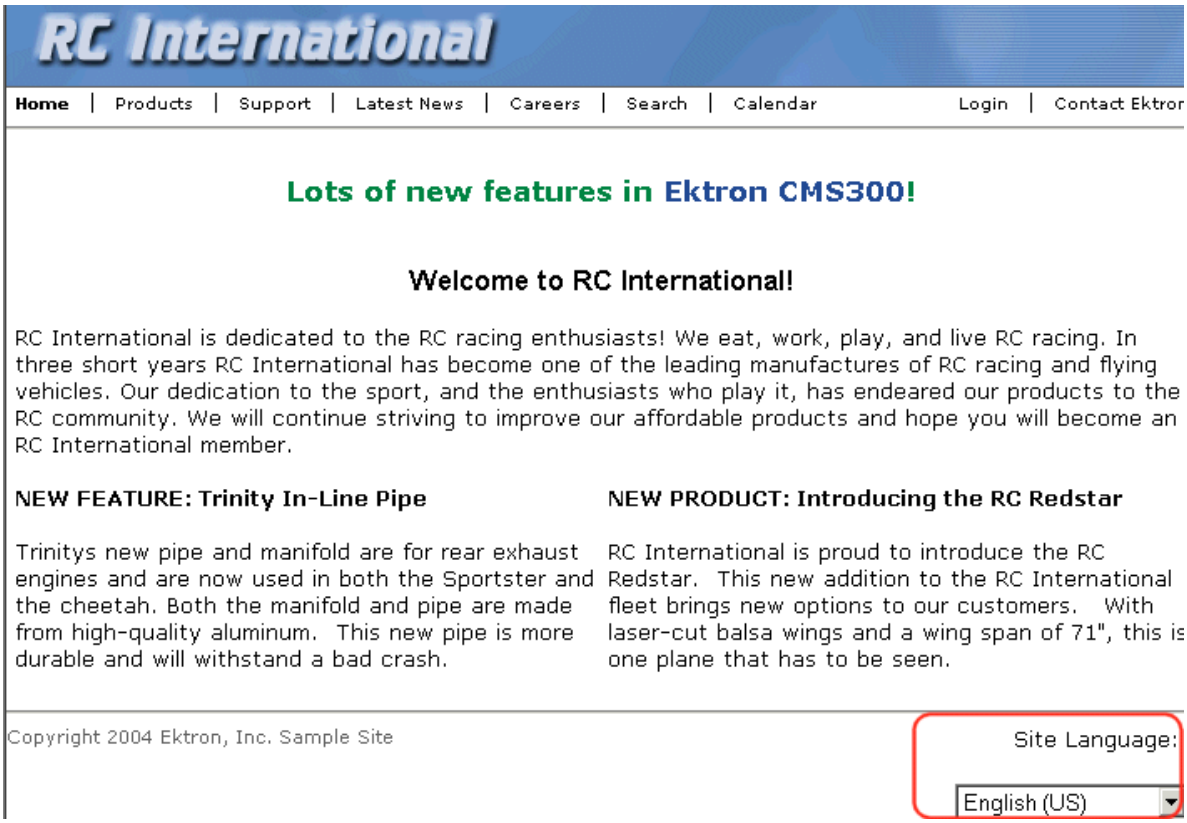
Enabling/Disabling Support for Multiple Language Content

Support for multi-language content is enabled in the web.config file. To enable or disable it, follow these steps.

1. Open the file `webroot\yourwebsite\web.config`.
2. To enable multi-language content, set the value of `ek_EnableMultilingual` to 1. To disable it, set it to zero (0).
3. Save and close `web.config`.

Viewing Your Site in Another Language

It's easy for your site visitors to view your site in any enabled language. On any screen, your developer can display a language drop-down list (circled in red below).



(For more information about the function used to display this, `ecmShowSiteLanguage`, see the **Ektron CMS400.NET** Developer's Manual.) On the sample site provided with **Ektron CMS400.NET**, this drop-down list appears in the lower right corner of the home page, but your developer can place it anywhere on any page.

Another way to indicate which language-edition of a content block to display is by adding the language parameter (`langType`) to the quicklink. For example, `products.aspx?LangType=1033` displays the English (US) edition of the products.aspx content block. This syntax automatically sets the language cookie.

NOTE For a list of the decimal values for each supported language, see "Appendix A: List of Supported Languages" on page 485.

What Happens if Chosen Language is Not Available

A visitor to your site uses one of the methods listed above to select a language. **Ektron CMS400.NET** uses the following criteria to determine which language edition to display for a content block.

1. If an edition of the content block is available in the selected language, display that.
2. If option 1 is not available, display an edition of the content in the default language (defined in the ek_DefaultContentLanguage variable in web.config).

NOTE When **Ektron CMS400.NET** is installed, the default language is English. *See Also:* "The Default Language" on page 317

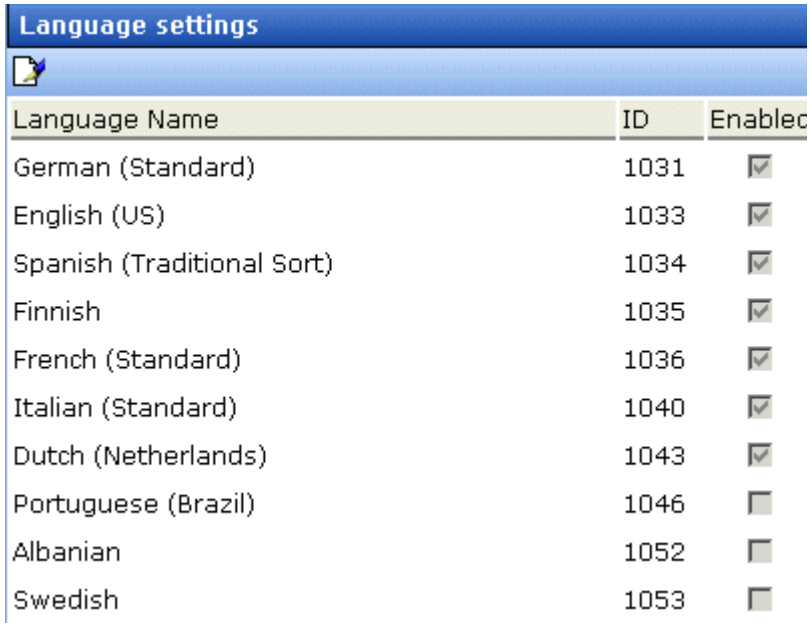
3. If neither edition is available, display nothing.

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.

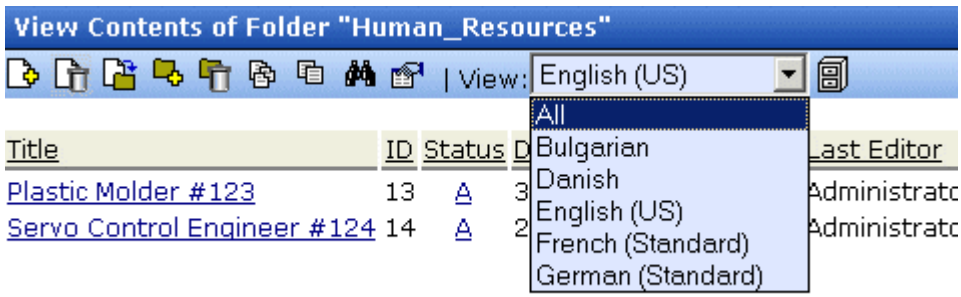
To change the list, follow these steps.

1. Click the Edit button ( ).
2. The Edit Language Setting screen appears.
3. Check the boxes next to languages you want to make available to your content contributors.



The checked languages populate the language drop-down list, which helps visitors to your site select a language. It's also used within **Ektron CMS400.NET** on screens that display multiple languages such as the View Contents of Folder screen (illustrated below).

NOTE The default language on a dropdown list is determined by the value in the **Default Application Language** field in the Configuration Setup screen.



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 CMS400.NET**. All content is created in that language.

The Default Language

The default language determines which edition of a content block to display when a visitor to your site does not select a language.

It is also used if a visitor selects a language other than the default, then navigates to a content block for which content does not exist in the selected language. In that case, **Ektron CMS400.NET** displays that content in the default language (if available).

Within **Ektron CMS400.NET**, the default language determines the default value on the language drop-down lists that appear on every page on which a user can select a language.

When you install **Ektron CMS400.NET**, the default language is English. Use the following procedure to change the default language for your multi-language Web site.

1. Open the folder `webroot\yourwebsite`.
2. Within that folder, open web.config.
3. Set the value of `ek_DefaultContentLanguage` to the locale id of the default language. For example, 1031 for German.

NOTE For a list of locale ids, see "Appendix A: List of Supported Languages" on page 485.

4. Save and close web.config.

Disabling a Language

To disable any language, uncheck the accompanying checkbox on the Edit Language Setting screen. (For more information, see "Determining Which Languages are Available" on page 315.)

If you want to disable the default language, you must first assign a new default language. "The Default Language" on page 317 explains what a default language is and how to assign one.

What Happens to Content Blocks When You Disable Their Language

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 CMS400.NET** or when visiting your site.

If you later enable that language again, the content blocks are once again available.

Creating a New 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 315.

3. Click the Add Content button ( ) and create the content as you would any content block. *See Also:* "Adding Content" on page 49
4. In order to add metadata to a content block, metadata specifications must have been created for the selected language. *See Also:* "Metadata" on page 79

Translating a Content Block

When translating a content block into a foreign language, you have three options.

Option	For more information, see
Copy original content into a new content block in a new language. Then, translate content manually.	"Translating Content Manually" on page 319

Option	For more information, see
Use the computer-based translation tool provided with **Ektron CMS400.NET**.	"Using Machine Translation" on page 321
Create an XLIFF or XHTML file from existing content blocks. The files are sent to a translation agency and return translated in the new language(s). Then, you import the translated files into your CMS.	"Using the Language Xport Feature" on page 324

Translating Content Manually

Use this procedure when you want to initialize a new foreign language content block with content from a source language, then translate the content manually. This copying should facilitate the translation.

For example, an editor is translating content from French to German. The editor copies the French edition to a new content block whose language is German. As the editor translates the French edition into German, he deletes the French content. Any images in the content would usually remain, and all formatting (tables, bullets, etc.) is retained.

After signing in to **Ektron CMS400.NET**, you copy a content block into a new content block of a different language by either

- navigating the Web site, or
- accessing the Workarea and navigating the folder structure

After copying the original content, translate it into the new language then delete the original text. Both procedures are described below.

Accessing a Content Block via the Web Site

1. Navigate to a page on which you can select the site language. *See Also:* "Viewing Your Site in Another Language" on page 314
2. Select the language into which you want to translate the content.

3. Navigate to a content block that you want to translate. You must have privileges to add content to this folder. *See Also:* "Setting Permissions" on page 85
4. Right click within the content block's border and a small menu appears.
5. Click the Add Content Block icon ( ).
6. The original language content appears. Translate into the new language then delete the original content.
7. In order to add metadata to a content block, metadata specifications must have been created for the selected language. *See Also:* "Metadata" on page 79
8. When you save the content block, it is saved as the edition of that content block in the selected language.

Accessing a Content Block via its Content Folder

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. Its status must allow editing (it cannot be submitted or pending).
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 language then delete the original content.

7. In order to add metadata to a content block, metadata specifications must have been created for the selected language. *See Also:* "Metadata" on page 79
8. When you save the content block, it is saved as the edition of that content block in the selected language.

Using Machine Translation

Ektron CMS400.NET includes a machine translation feature, which can automatically translate content from/to the following languages.

- English
- Dutch
- French
- German
- Italian
- Portuguese (Brazil)
- Spanish

NOTE Currently, machine translation is not supported for all languages in the Language Settings screen.

Like most software-based translation, someone fluent in the new language should review the translated content to verify that the translation is appropriate within the context of the page.

The machine translation feature lets you choose a glossary (that is, a field, industry, or subject area). This helps the software find the best translation for a term or phrase with different meanings in different fields.

To use the machine translation feature, follow these steps.

Accessing a Content Block via the Web Site

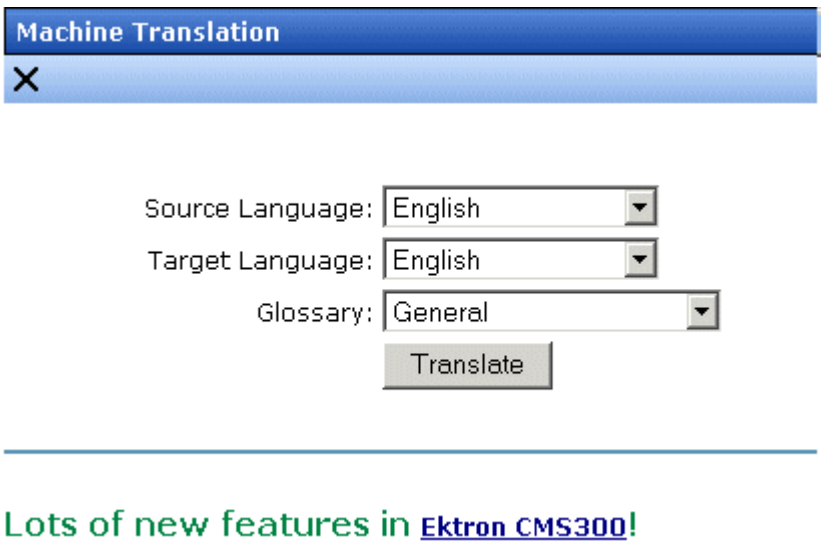
1. Navigate to a page on which you can select the site language. *See Also:* "Viewing Your Site in Another Language" on page 314
2. Select the language into which you want to translate.
3. Navigate to a content block you want to translate.

NOTE You must have privileges to add content to the folder. *See Also:* "Setting Permissions" on page 85

4. Right click within the content block's border. A menu appears.
5. Click the Add Content Block button ( ).
6. The original language content appears.
7. If the screen uses an XML configuration, select the text that you want to translate.

NOTE You cannot use Machine Translation to translate field names in an XML configuration. XLIFF files are a good way to translate XML field names. *See Also:* "Using the Language Xport Feature" on page 324

8. Click the Translate Content button ( ).
9. The translation screen appears.



10. Select the source (old) and target (new) languages.
11. If the content should refer to a specific glossary, select one from the drop down list.
12. Click the **Translate** button.
13. The translation appears. If it looks OK, press **Paste Content**.
14. The translated content replaces the original content in the editor. Modify as needed.

15. In order to add metadata to a content block, metadata specifications must have been created for the selected language. *See Also:* ”Metadata” on page 79
16. When you save the content block, it is saved as the edition of that content block in the selected language.

Accessing a Content Block via its Content Folder

To machine translate a content block by identifying its content folder, follow these steps.

1. Log into the Workarea and go to the View Content screen for the content block you want to translate. Its status must allow editing (that is, its status cannot be submitted or pending).
2. From the View drop-down list, select an original language (that is, the language from which it will be translated).
3. Click the content block 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. It must be a language supported for machine translation (English, Dutch, French, German, Italian, Portuguese (Brazil), or Spanish).

6. The original language content appears. Edit the title if appropriate.
7. Continue directions from ”Click the Translate Content button ().” on page 322

Using the Language Xport Feature

The Language Xport feature lets you copy content blocks into XLIFF files that can be submitted to a translation agency. The agency translates the files and returns them. In the final stage, you import the translated content block back into **Ektron CMS400.NET**.

What is XLIFF?

XLIFF (XML Localisation Interchange File Format) is a format that stores extracted text and carries data from one step to the next in the localization process. To learn more about XLIFF, visit these Web sites:

- http://www-106.ibm.com/developerworks/xml/library/x-localis/
- http://www-106.ibm.com/developerworks/xml/library/x-localis2/

Overview of Exporting/Importing Translation Files

1. You select one or more target languages.
2. You select which content blocks to translate. You can select by:
   - all content in a folder or only selected blocks
   - range of last published dates
   - all content blocks that satisfy the first two criteria or only content blocks that either do not yet exist or whose last published date precedes the source content
3. You can preview which content blocks are about to be converted into XLIFF and XHTML files. If necessary, you can modify the selection criteria and rerun the preview until you are satisfied with the list of content blocks to be translated.
4. **Ektron CMS400.NET** converts selected content blocks to an XLIFF or XHTML file. The converted content blocks are saved to `webroot/CMS400.NETsample/uploaded files/xliff` or `webroot/CMS400.NETsample/uploaded files/xhtml`.

   You can prepare the same content blocks for translation into several languages at once.
5. Transmit the XLIFF or XHTML files to a translation agency, which converts them into the new language(s). When the translation agency returns the files, replace the original files with the translated versions.

6. Use the Import feature to upload the translated content blocks to your Web site. If the editions of the content blocks do not exist in the target language, they are created at this point.

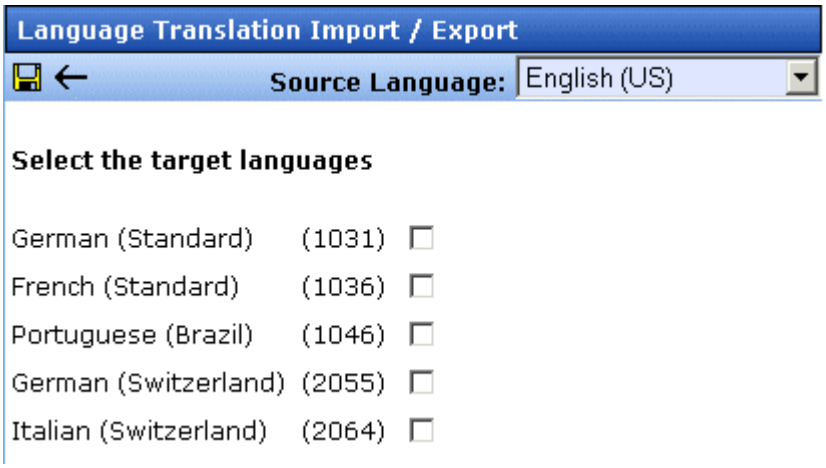
Creating the XLIFF or XHTML File

To create an XLIFF or XHTML file, follow these steps.

1. From the Workarea, click **Modules > Import/Export Lang**.
2. Click **Export Ektron CMS content to XLIFF and XHTML files**.
3. The Select Target Languages screen appears.

Selecting a Target Language

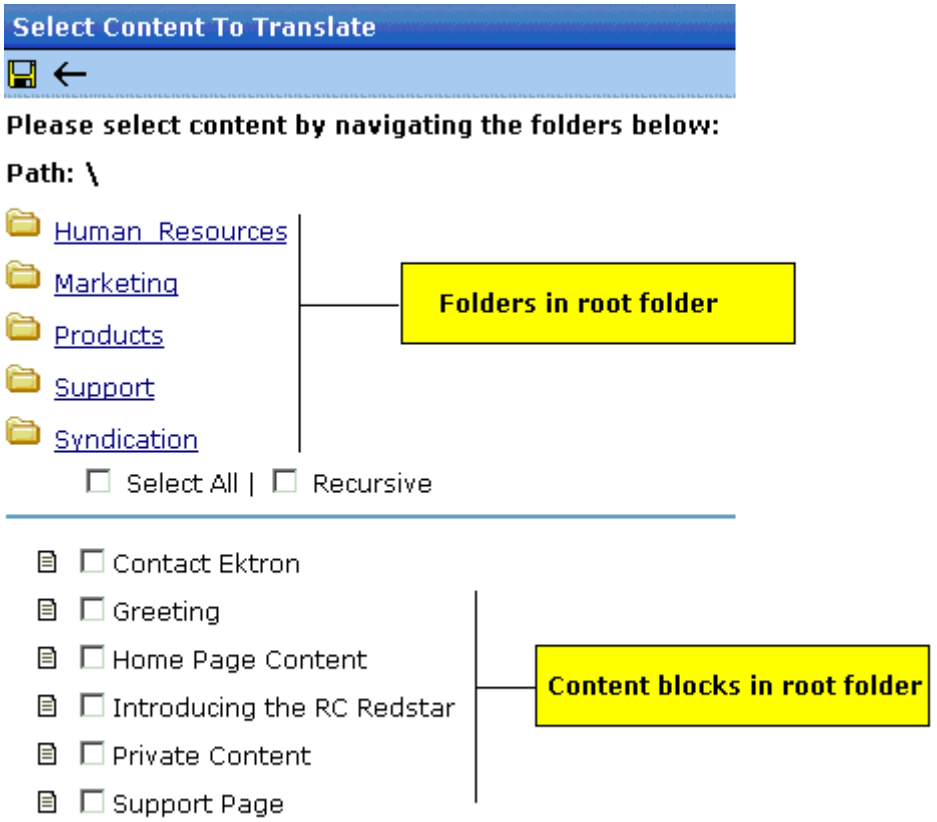
The screen lists all languages enabled in your Language Settings screen. *See Also:* "Determining Which Languages are Available" on page 315.



1. Check each language into which you want to translate content.

   If you need to change the source language, click the drop-down box in the upper right corner.
2. Click the Next button ( ).
3. The Select Content To Translate screen appears.

Selecting Content To Translate



The Select Content To Translate screen provides three methods of filtering content blocks before they are copied to the translation files.

- **Selecting content blocks and folders** - see "The Select All and Recursive Fields" on page 326
- **Only if target language is older or does not exist** - see "The Only if target language is older or does not exist Field" on page 327
- **Last published date range** - "Only content blocks with published date from: "No Start Date" to: "No End Date" Field" on page 328

IMPORTANT! Content blocks must satisfy *all* criteria to be converted to translation files.

The Select All and Recursive Fields

Use the **Select All** and **Recursive** fields to help choose content blocks by folder. The initial screen displays all *folders* in the root folder followed by all *content blocks* in that folder. To choose all files in a folder, check **Select All**. To select all files in a folder's subfolders, check **Recursive**. If you check **Recursive**, **Select All** is automatically checked for the current folder.

Here are some tips on using these fields.

- To select *all content blocks in your CMS*, click **Select All** and and **Recursive** while viewing the root folder.
- If you check **Select All** then uncheck one file, **Select All** becomes unchecked.
- To select files in another folder, click that folder then check its files as needed.
- If you are not using **Select All**, you can only select content blocks from one folder at a time. To select individual content blocks from several folders, repeat the entire process for each folder.

The Only if target language is older or does not exist Field

Check this field if you want to select content blocks by the following criteria.

- Only select a source content block if its last published date precedes the last published date of the content block in the source language. (The table below illustrates this point.)

or

- An edition of the content block does not exist in the target language. You are creating the first edition.

If you do not check this field, this content block is copied to the translation file regardless of current editions.

Example 1 - **Only if target language is older or does not exist** is checked

Content block edition	Last published date	Are translation files created for content block?
Target	12/01/2004	No because target file's last published date = source file's last published date
Source	12/01/2004	

Example 2 - **Only if target language is older or does not exist** is checked

Content block edition	Last published date	Are translation files created for content block?
Target	10/18/2004	Yes because target file's last published date precedes source file's last published date
Source	12/01/2004	

Example 3 - **Only if target language is older or does not exist** is checked

Content block edition	Last published date	Are translation files created for content block?
Target	does not exist	Yes because target file does not exist
Source	12/01/2004	

Only content blocks with published date from: "No Start Date" to: "No End Date" Field

Use this field to limit content blocks by a range of published dates.

For example, to include only content blocks whose last published date is no later than December 1, 2004, you would enter no **Start Date** and December 1, 2004 as the **End Date**.

In this case, if a content block was published on November 28 and again on December 5, the version published on November 28 would be copied to the translation files.

To select a start date, follow these steps. (Follow the same procedure for end date.)

1. Click **No Start Date**.
2. The following date selector appears.

3. Select the year, month and day.
4. Click **insert**.

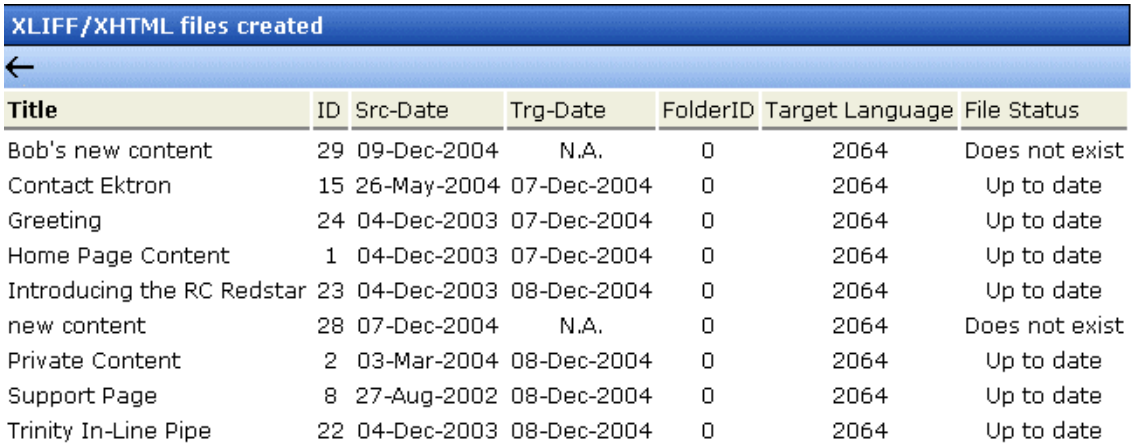
Previewing Translation Files

After deciding on your target languages and selecting content blocks, you can view a report of what will appear in the translation files you are about to create. For each content block in the file, you see information such as its ID number and its folder ID number, last published date of source edition, and last published date of target edition.

After viewing the report, you can go ahead and create the translation files for those content blocks or modify the content block criteria. If you modify, you can the view the report again until you are satisfied that the correct content blocks will be included.

To preview the contents of the translation files, follow these steps.

1. Complete the criteria on the Select Content To Translate screen. *See Also:* ”Selecting Content To Translate” on page 325
2. Click the Reports button ( ).
3. The screen displays the report for all content blocks that satisfy the criteria. An example is below.



XLIFF/XHTML files created

Title	ID	Src-Date	Trg-Date	FolderID	Target Language	File Status
Bob's new content	29	09-Dec-2004	N.A.	0	2064	Does not exist
Contact Ektron	15	26-May-2004	07-Dec-2004	0	2064	Up to date
Greeting	24	04-Dec-2003	07-Dec-2004	0	2064	Up to date
Home Page Content	1	04-Dec-2003	07-Dec-2004	0	2064	Up to date
Introducing the RC Redstar	23	04-Dec-2003	08-Dec-2004	0	2064	Up to date
new content	28	07-Dec-2004	N.A.	0	2064	Does not exist
Private Content	2	03-Mar-2004	08-Dec-2004	0	2064	Up to date
Support Page	8	27-Aug-2002	08-Dec-2004	0	2064	Up to date
Trinity In-Line Pipe	22	04-Dec-2003	08-Dec-2004	0	2064	Up to date

The following table describes the report's column headers.

Column Header	Description
Title	The content block title
ID	The content block ID number
Src-date	The most recent publish date of the source edition of the content block.
Trg-date	The most recent publish date of the target edition of the content block.
FolderID	The content block 's folder ID number
Target Language	The language into which the source content block will be translated. *See Also:* "Appendix A: List of Supported Languages" on page 485

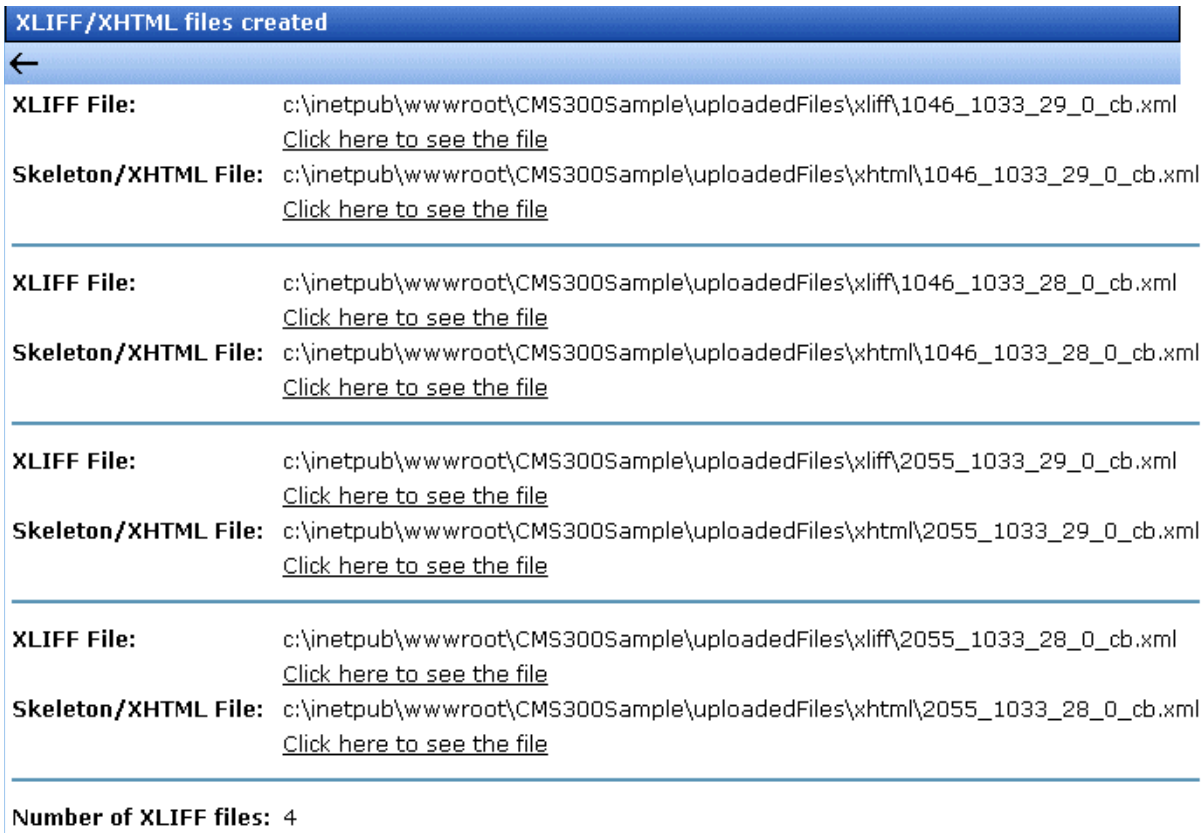
Column Header	Description
File Status	The status of the target language edition of the content block. Possible values are: • Does not exist - there is no target-language edition of that content block • Up to date - the last published date of the target language edition matches the last published date of the source-language edition • Older than source - a target-language edition of that content block exists; its last published date precedes the last published date of the source-language edition

Once you are satisfied with the content blocks on the report, proceed to ”Creating Translation Files” on page 331.

Creating Translation Files

To create translation files, follow these steps.

1. Complete the criteria on the Select Content To Translate screen. *See Also:* ”Selecting Content To Translate” on page 325
2. Click the Save button ( ).
3. A screen displays the XLIFF and XHTML files that were created. An example is below.



For each content block that satisfied the criteria on the Select Content to Translate screen, two files were created: one XLIFF and one Skeleton XHTML file.

The following information is included inside the XLIFF file. Note that **TODO** precedes each string that needs to be translated.

```
<?xml version="1.0" ?>
- <xlf:xliff version="1.1" xmlns:xlf="urn:oasis:names:tc:xliff:document:1.1">
  - <xlf:file datatype="xml" original="1035_1033_2_0_cb.xml" source-
      language="1033" target-language="1035">          file name
    - <xlf:header>  target and source language
      - <xlf:skl>
          <xlf:external-file href="1035_1033_2_0_cb.xml" />
        </xlf:skl>
      </xlf:header>
    - <xlf:body>
    - <xlf:group id="6" restype="x-html-contentcomment"
        resname="contentcomment">
      - <xlf:trans-unit id="6" datatype="plaintext">
          <xlf:source>only users and member / member can see
            this content</xlf:source>
          <xlf:target>TODO only users and member / member can
            see this content</xlf:target>  text to be translated
        </xlf:trans-unit>
      </xlf:group>
```

The file name syntax is explained below.

XLIFF/XHTML File Names

When an XLIFF or XHTML edition of a content block is created for a translation agency, it is named according to the following pattern:

*folder path _target language_source language_content block ID_ folder ID*_cb.xml

For example

```
c:\inetpub\wwwroot\CMS300Sample\uploadedFiles\xliff\1031_1033_24_0_
cb.xml
```

NOTE The XLIFF files are saved to `webroot\uploaded files\xliff`, while the XHTML files are saved to `webroot\uploaded files\xhtml`.

The above file was created from English (1033) for translation into German (1030). It is content block 24 in the root folder (folder ID= 0).

Submitting Translation Files to Service Agency

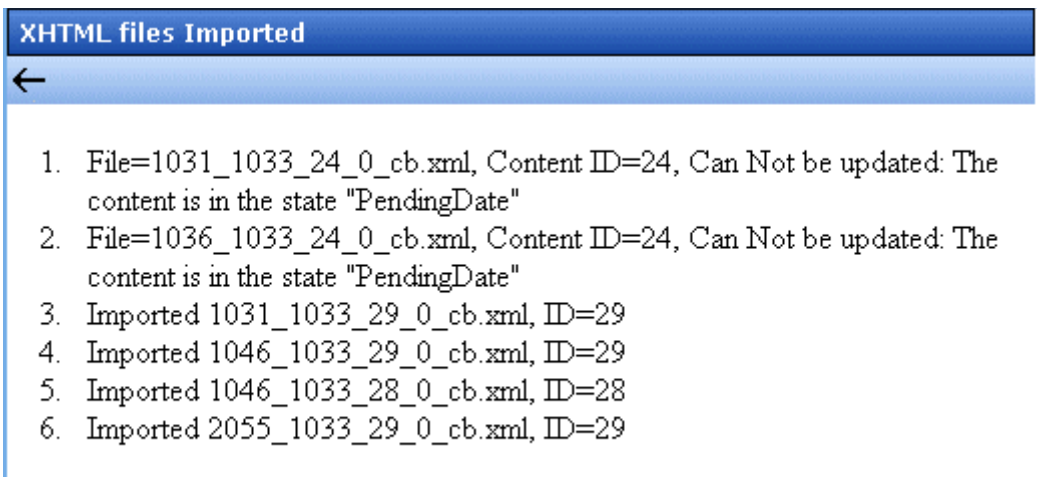
After you create the translation files, determine which format the service agency wants: XLIFF or XHTML. Then make a copy of the corresponding folder and send it to the service agency.

IMPORTANT! Leave the original translation files (both XLIFF and XHTML) intact. They are needed when you import the translated files back into **Ektron CMS400.NET**.

When the service agency returns the files, copy them back to the original folder. During this process, you overwrite the translation files that were copied to that folder. It is important that your translation agency does not rename the files -- if they do, you cannot import them successfully.

Importing Translated Files into Ektron CMS400.NET

To import the translated files into **Ektron CMS400.NET**, go to the **Workarea > Modules > Import/Export Lang**. Then, choose the import option corresponding the type of file your service agency translated. After the translation files are imported, a report shows the results. An example is below.



As you can see, content block ID=24 was not imported because it has a future start date. You also cannot import a content block that is currently checked out. When such a content block is flagged on the report, check it back in, then import the files again.

New, foreign language editions of the **Imported** content blocks on the report are now created. For each new edition:

- the next available number is appended to the title to distinguish it from the source edition. For example: **Home Page Content(1)**.
- its status is checked in. It can now enter the approval process just like any other content block.
- its history indicates it was checked in at the time the report was run

After you import the translation files, **Ektron CMS400.NET** removes them from the file system.

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.

.

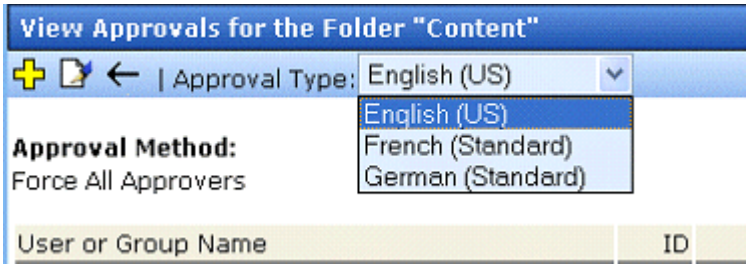
3. Only content blocks in that folder and the selected language appear.

You can perform the same activities with these content blocks as any other content block.

Multi-Language Approval Chains

Just as you can create separate editions of content blocks for each enabled language, you can set up a language-specific approval chain and method. When determining a folder's approval chain, first select a language then select users and groups with 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.



Only users in the language-specific approval chain for a folder can approve content in that language.

You can also set a language-specific approval method. *See Also:* "The Approval Method" on page 99

Working with Tasks in a Multi-Language System

If you create a content block then add a task to it, the task can be in any enabled language. This would be helpful if, for example, you review an English content block then want to assign the task of translating it into another language in that language.

If you create a task then try to assign a content block to it, you can only choose from content blocks in the language of the task.

Working with Collections in a Multi-Language System

In a multi-language **Ektron CMS400.NET** system, you can create a language-specific edition of each collection. For information about doing this, see the **Ektron CMS400.NET** User Manual section "Working with Collections."

Working with Menus in a Multi-Language System

NOTE If you are not familiar with the Ektron CMS400.NET's menus feature, please read "Menu Feature" on page 286 and the Ektron CMS400.NET User Manual section "Working with Menus."

You can create an edition of any menu in every supported language. When a site visitor selects a language, navigates to a page that has a menu and clicks the menu link, **Ektron CMS400.NET** displays the menu in the selected language if it is available. If a menu in that language is not available, nothing appears.

Before creating or translating a menu, it's a good idea to create or translate all content blocks that will be on the menu. In this way, you can link these content blocks to the new menu. However, after creating a menu, you can always add new items to it.

For details about translating menus, see the **Ektron CMS400.NET** User Manual section "Working with Menus", "Managing Menus", "Working with Menus in a Multi-Language System."

Creating an External Link to a Page of Foreign Content

If another Web site links to a multilingual page on your site, the URL must include the language ID parameter. For example:

```
www.ektron.com/web-content-management-solutions.aspx?LangType=1036
```

Setting Up a Multilingual Web Site

Beginning with Release 4.7, **Ektron CMS400.NET** supports content blocks in several languages. This section lists the steps to follow when setting up such a site.

Step	For details, see
1. In web.config, make sure multilingual support is enabled. Also, make sure the default content language is the one used by the majority of your site's content blocks. If you had a previous version of **Ektron CMS400.NET** and selected a default language on the Database Upgrade Utility, be sure that default language matches the one in web.config.	
2. Enable languages your site will support.	"Determining Which Languages are Available" on page 315
3. Add language selection function to templates.	"Viewing Your Site in Another Language" on page 314
4. Create a metadata definition for each supported language.	"Adding a Metadata Definition" on page 81
5. Create or translate content blocks.	• "Creating a New Content Block" on page 318 • "Translating a Content Block" on page 318

Step	For details, see
6. Change the language of content blocks not in the default language. Note: Only needed if Web site previously had content blocks in more than one language.	"Resolving Conversion Issues" on page 341
7. Set up approval chains for new content blocks.	"Multi-Language Approval Chains" on page 335
8. Set up multilingual collections.	"Working with Collections in a Multi-Language System" on page 336
9. Set up multilingual menus.	"Working with Menus in a Multi-Language System" on page 336
10. Modify text on templates.	"Modifying Page Content Based on Language Selection" on page 339
11. Translate graphics.	"Modifying Images Based on Language Selection" on page 340

Creating Web Pages that Support Several Languages

When thinking about setting up your Web site to support content in multiple languages, consider these three actions.

Action	For more information, see
Create language-specific content blocks, menus, collections	• "Translating a Content Block" on page 318 • "Working with Collections in a Multi-Language System" on page 336 • "Working with Menus in a Multi-Language System" on page 336 After you create these items, have the page invoke that item dynamically using an appropriate function (such as `ecmContentBlock`). When **Ektron CMS400.NET** receives a request to display an item that includes a language and item id number, it returns the language-specific edition. To learn about letting the user select a language from a Web page, see "Viewing Your Site in Another Language" on page 314.

Action	For more information, see
Adjust template content to user language	"Modifying Page Content Based on Language Selection" on page 339
Translate text in images	"Modifying Images Based on Language Selection" on page 340

Modifying Page Content Based on Language Selection

If a template's text should change according to a user's language selection, use a case statement to provide the language-specific content. A good example of this is the template used on the RC international sample site (Illustrated below).

Assume you want to create editions of the menu that runs across the header (**Home**, **Products**, etc.) in three languages:

- English
- French
- German

To do so, follow these steps.

NOTE This procedure uses the header.asp file delivered with the RC international sample site as an example.

1. In the template file, declare each menu option a variable. For example:

```
Dim t_search, t_products, t_support, t_news, t_careers, t_calendar, t_home, t_login,
t_site_lang, t_contact, t_copyright, calendar_id
```

2. Enter case statements that provide the value of each variable in each language. (1031 is the decimal code for German, 1036 for French.) The following illustrates how to do this for the search menu option.

```
Select Case ContentLanguage

    Case "1031"

        t_search = "Suche"

    Case "1036"

        t_search = “Recherche"

    Case else

        t_search = "Search"

End Select
```

Now, when a user visits a page controlled by this template and selects French or German as the site language, the page is refreshed and the translated values appear on the template.

Modifying Images Based on Language Selection

Many Web page templates also include images that require translation. You can set up templates to invoke images in the user-selected language by following these steps.

1. For each supported language, create a folder within your Web site’s images folder. Name each folder according to the language’s decimal id value (for example, German is 1031).
   See Also: ”Appendix A: List of Supported Languages” on page 485

   If your site supports English, don’t forget to create a folder named 1033.
2. Copy all images to each language-specific folder.
3. Within each folder, translate the text on each image but *do not change its name.*

WARNING! If you change an image’s name, this procedure will not work.

4. Wherever the image is referenced in your template or Web page, replace the current reference with this:

   ```
   img src=”images/<%= Contentlanguage %>/image name”
   ```

   For example:

   ```
   img src=”images/<%= Contentlanguage %>/companylogo.jpg”
   ```

When a visitor to your Web site selects a language then navigates to the page with the image, the `Contentlanguage` variable comes into

play. It uses the visitor's language selection value to identify the folder that contains images in that language. That image then appears on the page.

To continue the above example, if a user views the site in German, the code that invokes the image translates to this:

```
img src="images/1031/companylogo.jpg"
```

Resolving Conversion Issues

IMPORTANT! This section is only relevant to Web sites that upgrade to **Ektron CMS400.NET** Release 4.7 or higher and which, prior to the upgrade, had content blocks in more than one language. If your site does not meet both criteria, you can ignore this section.

When you upgrade to 4.7 or higher, the Database Upgrade utility prompts you to select a language. All content blocks in your site are then assigned that language. (Prior to Release 4.7, content blocks did not have a language attribute.) If all content blocks are not in the selected language, you must resolve that discrepancy.

For example, assume for the sake of simplicity that your pre-4.7 Web site had four content blocks: three English and one French. During the database upgrade, you select English. Three content blocks are then assigned the correct language, but the fourth content block, which should be assigned French, is also assigned English. You cannot simply change a content block's language assignment. When resolving the discrepancy, there are two possible scenarios.

Scenario 1

Prior to 4.7, your site had a unique content block in French (id number 4). To resolve this, copy the content block to a new French edition with the same id number. Then, delete the English edition.

Before Upgrade

Content block id	Language attribute	Actual language

1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content block id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
4	**English**	**French**

After Following Procedure Listed Below

Content block id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
4 (deleted)	~~**English**~~	~~**English**~~
4	**French**	**French**

Procedure for Scenario 1

To change a content block's language, follow these steps.

NOTE Before beginning this procedure, make sure

- the correct language for the content block is enabled. See "Determining Which Languages are Available" on page 315.
- metadata has been defined for the new language. See "Adding a Metadata Definition" on page 81

1. Within **Ektron CMS400.NET**, navigate to the View Content screen of content block 4.
2. From the Add drop-down list, select French.

3. **Ektron CMS400.NET** creates a French edition of content block 4.
4. Check in that edition of the content block.
5. Delete the English edition of content block 4. *See Also:* "Deleting Content" on page 63

Scenario 2

Prior to 4.7, your site had English and French content blocks (id numbers 3 and 4) that presented the same content in each language. You want to leave the English content alone, create a French edition of that content block with the same id number, then delete the French content block.

The advantage of this solution is that both editions of the content block have a single id number. So, when a site visitor selects a language and navigates to that page, **Ektron CMS400.NET** displays the edition of the content block for the selected language.

To resolve this, create a French edition of the English content block, copy the French content, then delete the French content block.

Before Upgrade

Content block id	Language attribute	Actual language
1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content block id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
4	**English**	**French**

After Following Procedure Listed Below

Content block id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
3	**French**	**French**

~~4~~ (deleted)	~~na~~	~~na~~

Procedure for Scenario 2

To solve the language conversion issue explained in scenario 2, follow these steps.

NOTE Before beginning this procedure, make sure

- the correct language for the content block is enabled. See "Determining Which Languages are Available" on page 315.
- metdata has been defined for the new language. See "Adding a Metadata Definition" on page 81

1. Within **Ektron CMS400.NET**, navigate to the View Content screen of content block id 3.
2. From the Add drop-down list, select French.

3. **Ektron CMS400.NET** creates a French edition of content block 3.
4. Translate the title into French.
5. Delete the English elements of content block 3 (content, summary, metadata, schedule, and comments).
6. Check in the French edition of content block 3.
7. Copy and paste all relevant elements of the French content block (id 4) into the French edition of content block 3 (content, summary, metadata, schedule, and comments).
8. Delete content block id 4. *See Also:* "Deleting Content" on page 63

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**.

Character Encoding

The following Ektron Knowledge Base articles describe issues surrounding the display of special characters within **Ektron CMS400.NET**. Note that these articles refer to eWebEditPro, Ektron's WYSIWYG editor embedded within **Ektron CMS400.NET**.

Wherever these articles contain references to eWebEditPro's configuration data or file (config.xml), you should instead update the web.config file, located in your site's root folder.

- HOWTO: produce UTF-8 (www.ektron.com/developers/ewebeditpro_tutorials.cfm?id=403)
- INFO: Character Encoding (www.ektron.com/developers/ewebeditprokb.cfm?id=1807)
- INFO: Encoding special characters (www.ektron.com/developers/ewebeditprokb.cfm?id=384)
- HOWTO: store unicode characters so they are searchable (www.ektron.com/developers/cms300_developers.cfm)

Microsoft SharePoint Portal Server Integration

Before You Begin

Before you begin using the Ektron CMS400.NET Web Parts, it is recommended that you read the following section of the manual. It provides information about installing and configuring the Ektron CMS400.NET Web Parts, as well as overview information about Microsoft SharePoint Portal Server 2003.

Once completed, you can move on to "Ektron CMS400.NET Web Parts" on page 360 for information about how to use the Ektron CMS400.NET Web Parts.

Overview

Ektron CMS400.NET can easily be integrated with Microsoft's SharePoint Portal Server. Ektron CMS400.NET's custom display functions, as well as other functions, have been configured to be used as Web Parts within the SharePoint Portal Server. By combining the simplicity of Ektron CMS400.NET and the power of Microsoft SharePoint Portal Server, users can easily access, share, and manage Ektron CMS400.NET Web site content from a single application.

This section explains how Ektron CMS400.NET easily, and seamlessly, integrates with Microsoft SharePoint Portal Server.

Prerequisites

Ektron CMS400.NET Server

A server running Ektron CMS400.NET must have a directory under the root folder called `cms400Example`, which contains the necessary SharePoint Portal Server .aspx display pages. These pages are included in the .zip file that you received with

the SharePoint integration files. They are commonly inserted into the following directory:

```
\CMS400.NETScripts\Portals\SharePoint2003
```

This directory is referenced by your SharePoint Portal Server's Web.config file.

NOTE These files enable Ektron CMS400.NET's Web Parts to work.

SharePoint Portal Server

For Ektron CMS400.NET to successfully integrate with Microsoft SharePoint Portal Server, a Web server must first be set up and configured with the following applications:

- Windows 2003 Server Operating System
- Microsoft SharePoint Portal Server 2003

IMPORTANT! SharePoint requires its own IIS site -- it cannot use the IIS site set up for Ektron CMS400.NET. This is because SharePoint alters some of the settings in the IIS site to which it is installed.

Configuring Your SharePoint Portal Server

Ektron CMS400.NET includes a separate installation program to install necessary files onto your SharePoint Portal server, as well as update necessary files.

What Does the Installation Program Do?

The installation program performs many actions, including:

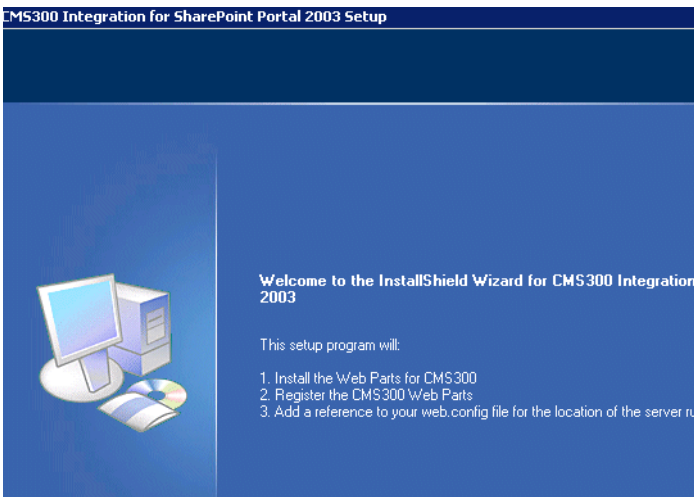
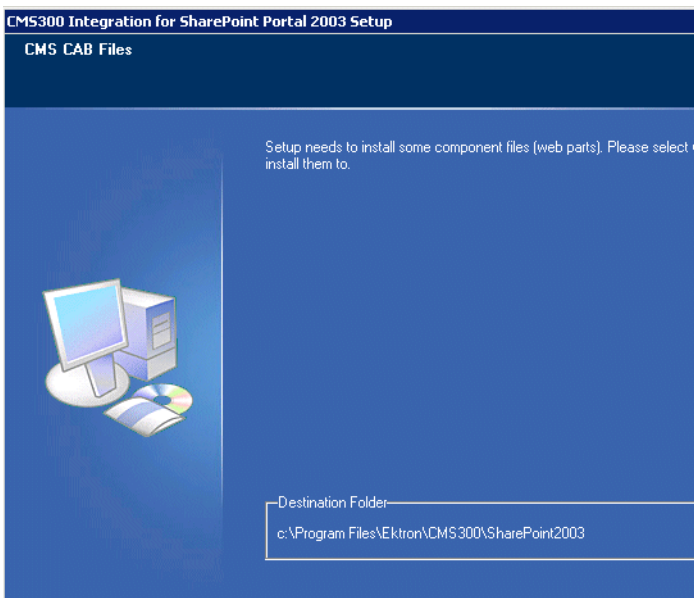
- Installs all Ektron CMS400.NET Web Parts
- Registers Web Parts in your SharePoint Web.config file
- Adds a necessary reference to your Ektron CMS400.NET Web site within your Web.config file

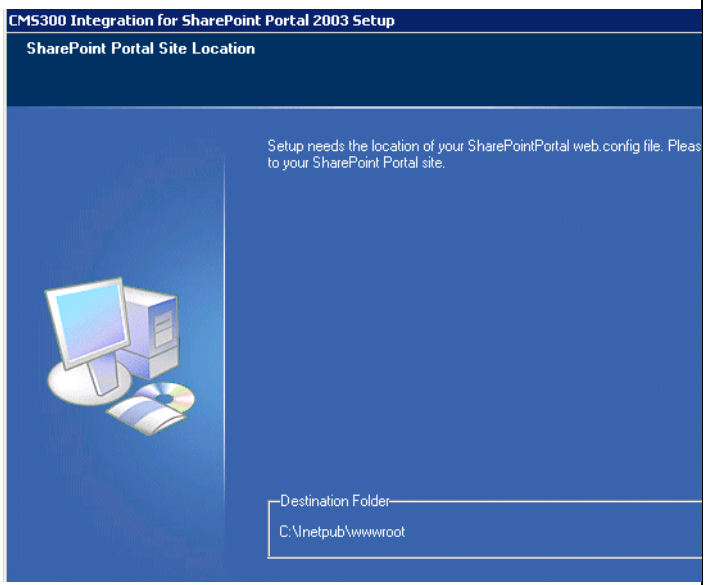
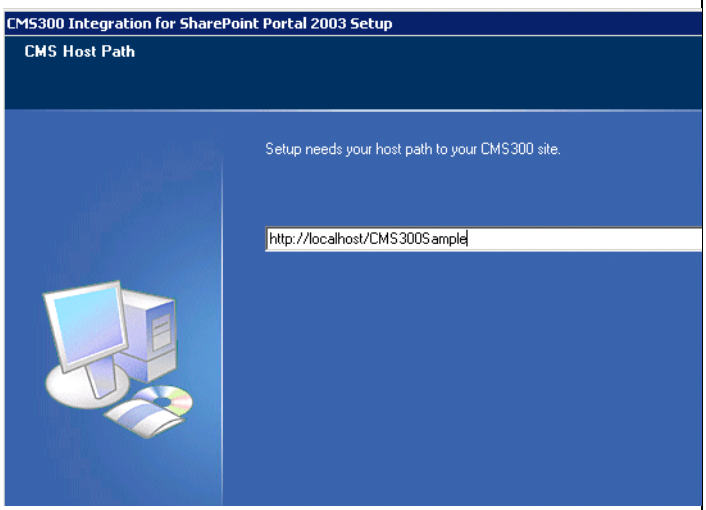
Performing the Installation

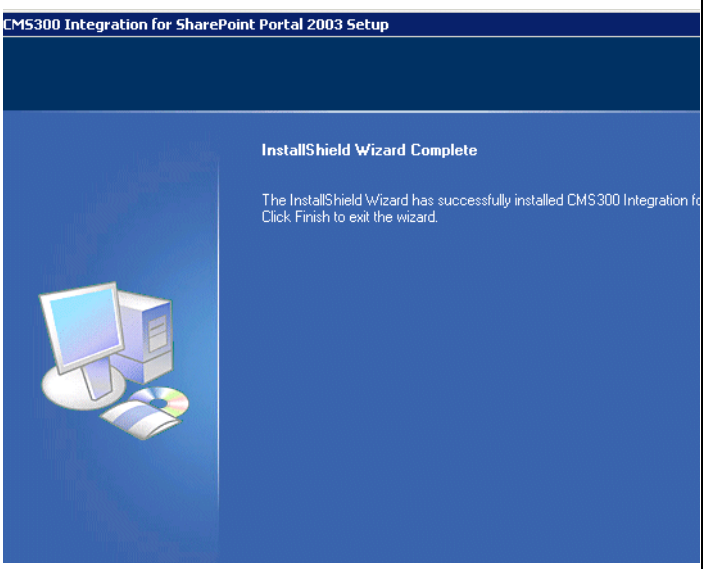
To configure your SharePoint Portal server using the Ektron CMS400.NET SharePoint integration .exe, follow these steps.

1. Move the installation file, SharePointForCMS.exe, to your SharePoint Portal Server.
2. Double-click the .exe file.
3. The installation's splash screen is displayed, and the installation begins.

   The following table guides you through the installation.

Setup Screen	Action
	4. Click **Next** to proceed. The CMS Cab Files screen is displayed.
	5. Specify the location on your SharePoint server where you want to install the Ektron CMS400.NET Web Part CAB files. Click **Browse** to specify a directory other than the default. 6. Click **Next** to proceed. The SharePoint Portal Site Location screen is displayed.

Setup Screen	Action
	7. Specify the root directory of your SharePoint Portal site (the directory that contains your Web.config file). Click **Browse** to specify a directory other than the default. 8. Click **Next** to proceed. The CMS Host Path screen is displayed.
	9. Enter the fully qualified path of your Ektron CMS400.NET Web site's root directory. For example, `http://www.yourEktronwebsite.com/CMS400Example` 10. Click **Next** to proceed. The installation performs the Web Part registrations. When complete, the Installation Complete screen is displayed.

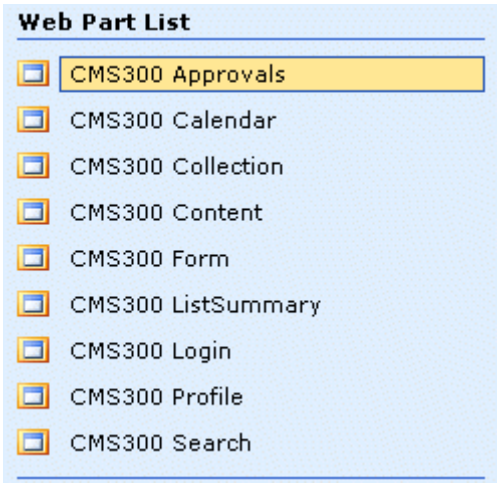
Setup Screen	Action
	11. Click **Finish** to exit the installation program. The necessary Ektron CMS400.NET integration files and settings are installed and configured on your SharePoint Portal Server.

Testing the Installation

Once the installation has been successfully completed, you can perform a simple test to be certain.

To test the installation, access your SharePoint Portal in a browser, and view your **Virtual Server Gallery**.

A list of Web Parts that were added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appear at the bottom of the page.



If the installation was not successful, see ”Installation Troubleshooting” on page 352.

What’s Next?

Having configured the SharePoint Portal Server, you are ready to add Ektron CMS400.NET Web Parts into your portal pages. See ”Microsoft SharePoint Portal Server Overview” on page 356 for information about working with Ektron CMS400.NET Web Parts.

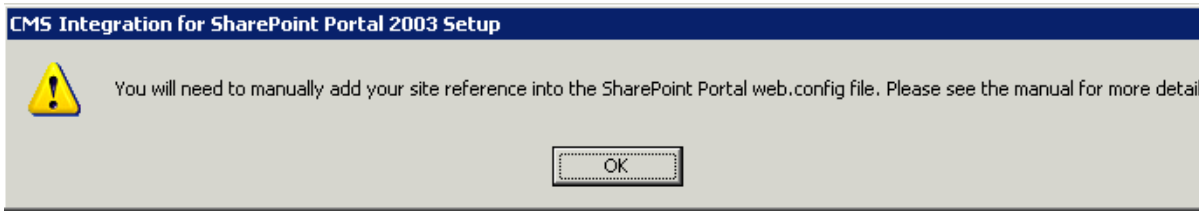
Installation Troubleshooting

During installation, you may receive messages that information you entered is not correct. If you continue the installation with incorrect data, it might be necessary to register the Ektron CMS400.NET Web Parts or update your Web.config file manually.

The following section explains solutions to problems that can occur if incorrect information was submitted during installation.

Incorrect SharePoint Portal Location

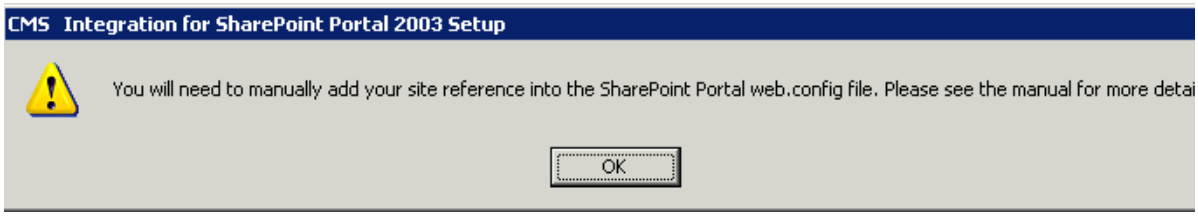
If an incorrect SharePoint Portal Server path location is given, the following message is displayed.



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 353 for more information.

Incorrect Ektron CMS400.NET Host Path

If an incorrect Ektron CMS400.NET Host Path is given during installation, the following message appears.



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 353 for more information.

Updating Web.config Manually

Your SharePoint Portal Server Web.config must contain necessary Ektron CMS400.NET information for the integration to work successfully. The Web.config file must include the following information for integration to work:

- Ektron CMS400.NET Web Parts as safe controls
- Ektron CMS400.NET site location

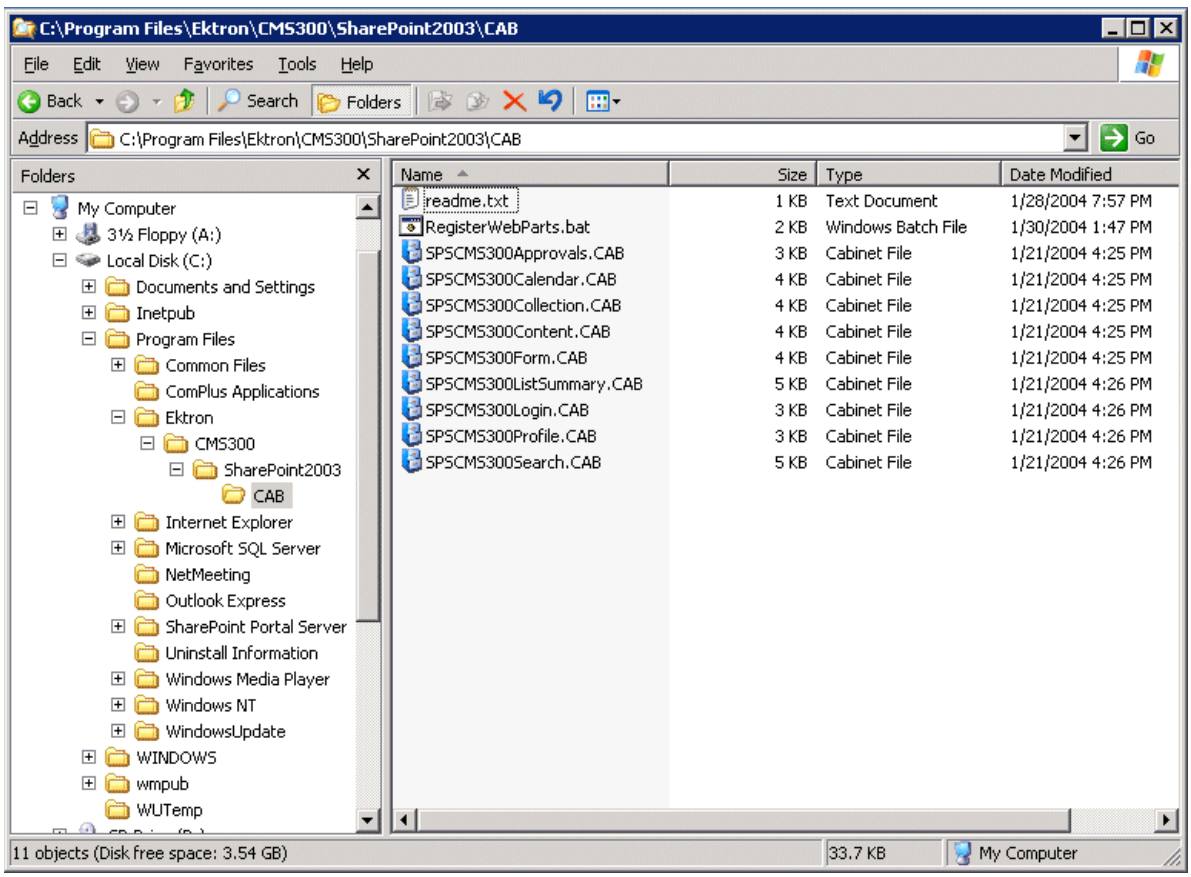
During the installation, if you received a message that you must update your Web.config file manually, the following section explains the actions that you must perform.

Registering Ektron CMS400.NET Web Parts as Safe Controls

In order for SharePoint to use the Ektron CMS400.NET Web Parts, they must be registered by SharePoint as safe controls. To do that manually, follow these steps.

1. Complete the Ektron CMS400.NET SharePoint Portal Integration Installation program. This installs the files that need to be registered. *See Also:* "Configuring Your SharePoint Portal Server" on page 348
2. Access the directory to which you installed CMS cab files during the installation program.

NOTE The default location is C:\Program Files\Ektron\CMS400\SharePoint2003\CAB



3. Double-Click **RegisterWebParts.bat** to execute the batch file that registers Ektron CMS400.NET Web Parts.

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

4. When complete, the following lines are added to your Web.config file:

```
<SafeControl Assembly="CMS400Approvals" Namespace="CMS400Approvals" TypeName="*" Safe="True"/>

<SafeControl Assembly="CMS400Calendar" Namespace="CMS400Calendar" TypeName="*" Safe="True" />

<SafeControl Assembly="CMS400Content" Namespace="CMS400Content" TypeName="*" Safe="True" />

<SafeControl Assembly="CMS400Form" Namespace="CMS400Form" TypeName="*" Safe="True" />

<SafeControl Assembly="CMS400ListSummary" Namespace="CMS400ListSummary" TypeName="*"
Safe="True" />

<SafeControl Assembly="CMS400Profile" Namespace="CMS400Profile" TypeName="*" Safe="True" />

<SafeControl Assembly="CMS400Search" Namespace="CMS400Search" TypeName="*" Safe="True" />

<SafeControl Assembly="CMS400Collection" Namespace="CMS400Collection" TypeName="*"
Safe="True"/>

<SafeControl Assembly="CMS400Login" Namespace="CMS400Login" TypeName="*" Safe="True" />
```

The Ektron CMS400.NET Web Parts are successfully registered, and your Web.config is updated with the Web Parts registered as safe controls.

Specifying Your Ektron CMS400.NET Site Path Manually

The Web.config file must contain a reference to your Ektron CMS400.NET Web site. During installation, if an incorrect path or no path was given, you need to update your Web.config file with the correct Ektron CMS400.NET's site path. To do this, follow these steps.

1. Open your SharePoint Portal Server's Web.config for editing with a text editing program such as NotePad.
2. Enter the following information within the `<configuration>` tags.

```
<appSettings>

<add key="CMS400sitelocation" value="[CMS400SitePath]" />

</appSettings>
```

Where `[CMS400SitePath]` is a fully qualified path to the directory in your Ektron CMS400.NET Web server that contains the Ektron CMS400.NET display files for SharePoint.

For example, `http://www.yourEktronwebsite.com/cms400Example/cms400scripts/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.

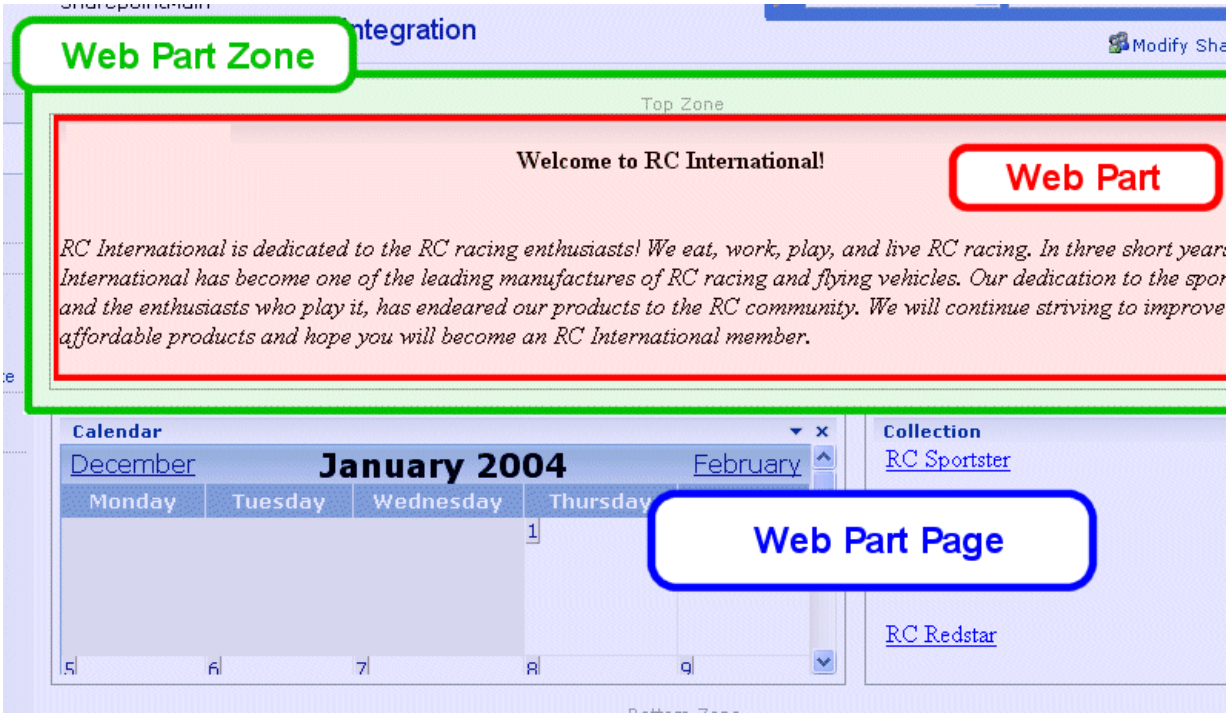
The portal facilitates end-to-end collaboration by enabling aggregation, organization, and search capabilities for people, teams, and information. Users can find relevant information quickly through customization and personalization of portal content and layout, as well as by audience targeting. Organizations 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:

- Web Part page
- Web Part zone
- Web Part

The following graphic shows the relationship of these components on a Web page in SharePoint.



What is a Web Part?

Components of a SharePoint Portal page are called Web Parts.

Microsoft defines a Web Part as:

> A modular unit of information that consists of a title bar, a frame, and content. Web Parts are the basic building blocks of a Web Part Page. A Web Part is the combination of a Web Part Description file (.dwp) and a Web Part assembly file (.dll). All Web Parts are based on Web Custom Controls.

Ektron has created a Web Part for each Ektron CMS400.NET display function, as well as Web Parts for other useful Ektron CMS400.NET information.

Three Types of Web Parts

There are three types of Web Parts.

Type	Description	Available to
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	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 user who made the changes. Other users 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	The user who added or imported the Web Part. Other users cannot see private Web Parts.

When properly configured, Ektron CMS400.NET Web Parts are shared Web Parts that can be personalized by different users (assuming they have the necessary permissions).

The type of Web Part you are working with can be important because:

- You may have permission to modify only some types of Web Parts on certain Web Part Pages, but not on other Web Part Pages
- You may be able to connect to certain types of Web Parts on a Web Part Page, but not to other types of Web Parts on the same Web Part Page

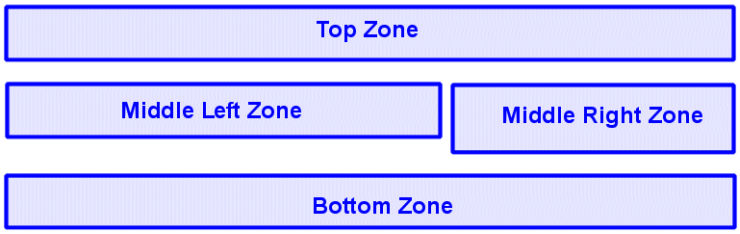
Web Part Zones

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 contain these 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 CMS400.NET Web Parts. These permissions are configured on the SharePoint server by the *SharePoint Portal Server* administrator, not the Ektron CMS400.NET administrator.

Refer to your SharePoint documentation for information about giving SharePoint users Member permissions.

Personal 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 contrasts the views.

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

Web Page View	Description
Personal	A view of a list, SharePoint document library, or Web Part Page that is available only to a particular user. The personal view of a Web Part Page uses a combination of shared property values and personalized property values. Changes made to a personal view apply only to the list, library, or page in that view and are therefore visible to that user only.

Keep this information in mind when inserting Web Parts.

Toggling Between Shared and Personal View

When logged in and in Edit Page mode, you can toggle between shared view and personal view by following these steps.

1. Click **Modify Shared Page** or **Modify My Page** (depending on your current settings).
2. A sub menu is displayed.
3. Click **Shared View** or **Personal View** to display the respective view.
4. The page refreshes, and the change is reflected.
5. Repeat this process to return to the previous view.

Ektron CMS400.NET Web Parts

When configured properly, all Ektron CMS400.NET Web Parts are available to be inserted by browsing to the SharePoint Portal **Virtual Server Gallery**.

Inserting Ektron CMS400.NET Web Parts

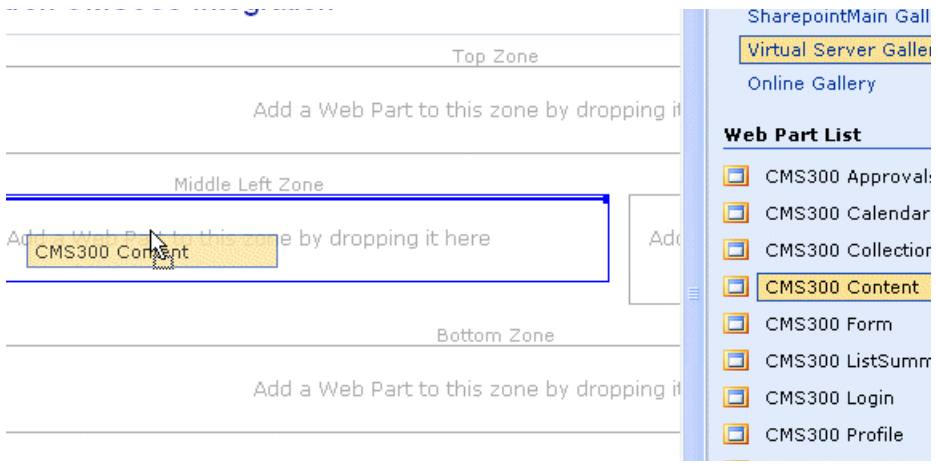
The following section explains the basics behind inserting Ektron CMS400.NET Web Parts.

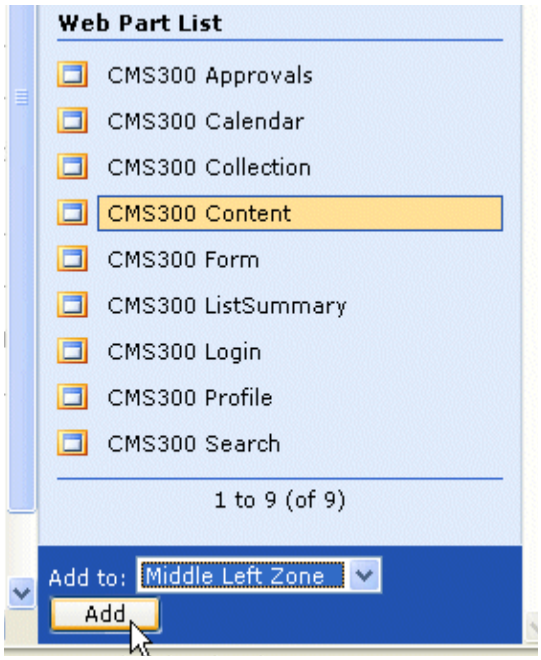
1. Log in to your SharePoint Portal Server.
2. Create or navigate to the Web Part zone into which you want to insert an Ektron CMS400.NET Web Part.
3. Click **Edit Page** at the bottom of the left navigation menu.

4. You are in Edit Page Mode.
5. Click **Modify Shared Page**, **Add Web Parts**, then **Browse**.
6. The Web Part zones are displayed, and the Add Web Parts menu appears on the right side of the screen.
7. Click **Virtual Server Gallery**.
8. A list of all Web Parts that have been added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appear at the bottom of the page

NOTE For information about Ektron CMS400.NET Web Parts, see "Managing Ektron CMS400.NET Web Parts" on page 364.

9. Insert an Ektron CMS400.NET Web Part one of two ways:

Method	Screenshot
Drag and drop the Web Part to the desired zone	

Method	Screenshot
1. Click a Web Part. 2. Choose the location at the bottom of the page. 3. Click **Add**.	

The selected Web Part is added to the selected zone.

4. Continue until you have inserted all desired Web Parts onto your shared or personal Web page.

Modifying Web Parts

All Web Parts have three properties that you can modify.

Property	Lets you
Appearance	Adjust appearance settings such as height, width, and title.
Layout	Adjust location, order, and other layout information.
Advanced	Set advanced options.

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

Some Ektron CMS400.NET Web Parts have additional configuration settings.

Modifying a Web Part

To modify a Web Part that has been inserted into a Web Part zone, follow these steps.

1. Log into your SharePoint Portal Server.
2. Navigate to a Web Part zone that contains an Ektron CMS400.NET Web Part that you want to modify.
3. Click **Edit Page** at the bottom of the left navigation menu.
4. You are in Edit Page Mode.
5. Click the Down Arrow ( ) at the top right corner of the Web Part you want to modify.
6. The Web Part Menu is displayed.
7. Click **Modify Shared Web Part**.
8. The Web Part is surrounded by a yellow dashed border, and the modify Web Part menu appears on the right side of the screen.
9. Modify the Web Part.

NOTE Information about modifying Ektron CMS400.NET Web Parts can be found in "Managing Ektron CMS400.NET Web Parts" on page 364.

10. Click **Apply** for the changes to take effect without closing the menu. Or, click **OK** to save and close the menu.

Managing Ektron CMS400.NET Web Parts

Ektron created Web Parts for all display functions in Ektron CMS400.NET, as well as two others. The following table lists each Web Part and its functionality.

Web Part	Displays	More Information
Approvals	A list of content blocks awaiting approval by the logged in Ektron CMS400.NET user.	"Approvals Web Part" on page 365
Calendar	A calendar created for the Ektron CMS400.NET Web site.	"Calendar Web Part" on page 366
Collection	A collection, as well as its display function, for a collection created in the Ektron CMS400.NET Web site.	"Collection Web Part" on page 367

Web Part	Displays	More Information
Content	A content block created for the Ektron CMS400.NET Web site.	"Content Web Part" on page 370
Form	A form content block created for the Ektron CMS400.NET Web site.	"Form Content Block Web Part" on page 372
Summary List	A summary list for a specified content folder in the Ektron CMS400.NET Web site.	"Summary List Web Part" on page 375
Login	A login button which allows users to log in, and be authorized, by the Ektron CMS400.NET Web site.	"Login Web Part" on page 379
Profile	Configurable profile settings for the logged in Ektron CMS400.NET user.	"Profile Web Part" on page 380
Search	Ektron CMS400.NET Web site search box and search results.	"Search Web Part" on page 382

Approvals Web Part

When logged into Ektron CMS400.NET via Microsoft SharePoint Portal Server, the approvals Web page displays a list of content blocks awaiting your approval.

NOTE See "Login Web Part" on page 379 for additional information.

Here is an example of the approvals Web Part displayed in SharePoint Server.

The approvals Web Part is identical to the approvals report page within the Ektron CMS400.NET Workarea.

Approvals Web Part Settings

The Approvals Web Part includes no additional settings.

Approving Content via SharePoint

After viewing approvals, you can approve any content block as you would in the Ektron CMS400.NET Web site.

Calendar Web Part

The calendar Web Part displays an event calendar created within the Ektron CMS400.NET Web site. Here is an example of a calendar Web Part displayed in the SharePoint Portal Server.

In addition to displaying the event calendar, if you are logged into the Ektron CMS400.NET Web site via SharePoint Portal Server, you can add and manage calendar events (assuming you have permissions to do so).

NOTE See "Login Web Part" on page 379 for information about adding a login Web Part and logging into the Ektron CMS400.NET web site via SharePoint Server.

Calendar Web Part Settings

The calendar Web Part can be configured to display any event calendar from your Ektron CMS400.NET Web site. To configure the calendar Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the calendar Web Part, as described in "Modifying Web Parts" on page 363.
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Calendar settings**.
3. The Calendar Web Part Settings page is displayed.
4. Change the value in the **CalendarID** field to the ID number of the event calendar you want to be displayed.
5. Click **Apply** for the changes to take effect without closing the menu.
6. The screen is refreshed with the updated calendar displayed.
7. Make additional changes to the Calendar Web Part. Or, click **OK** to close the Modify Web Part area.

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

Managing Calendars and Calendar Events

When you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can manage your calendars and calendar events. Actions that you can perform from the SharePoint server include

- 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 displays a collection that has been created in your Ektron CMS400.NET Web site. Here is an example of a collection Web Part displayed in the SharePoint Portal Server.

In addition to displaying the collection in the portal, if you are logged into the Ektron CMS400.NET Web site via SharePoint, you can perform all actions related to collections.

NOTE See "Login Web Part" on page 379 for information about adding a login Web Part and logging into the Ektron CMS400.NET web site via SharePoint Server.

Collection Web Part Settings

After a collection Web Part is 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 it. To configure the collection Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the collection Web Part as described in "Modifying Web Parts" on page 363.
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Content settings**.
3. The Collection Web Part Settings information is displayed.
4. Make the necessary changes to the available fields using the following table as a reference.

Field	Description
CollectionID	The ID of the collection you want to display in the portal.

Field	Description
Collection Display Function	The name of the display function you want to apply to the collection. Contact your Ektron CMS400.NET Web site developer for a list of available display functions.

5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated collection displayed.
7. Make 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 CMS400.NET Content

When logged into the Ektron CMS400.NET Web site via SharePoint, you may perform any action on the collection, assuming you have the proper permissions. Some collection-related actions you may perform include

- Adding new content to the collection
- Re-ordering items in the collection
- Removing items from the collection
- Editing collection information

To manage the Ektron CMS400.NET Web site collection within SharePoint, follow these steps.

1. Log In to the Ektron CMS400.NET Web site via the Login Web Part (see ”Login Web Part” on page 379 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 in which the content Web Part is located.

2. The collection displayed by the collection Web Part is surrounded by a colored border.

3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access the Ektron CMS400.NET workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET collections.

Content Web Part

The content Web Part is used to display any content block created in the Ektron CMS400.NET Web site. Here is an example of one displayed in the SharePoint Portal Server.

If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the content (see "Managing Ektron CMS400.NET Content" on page 371 for more information).

NOTE See "Login Web Part" on page 379 for information about adding a login Web Part and logging into the Ektron CMS400.NET web site via SharePoint Server.

Content Web Part Settings

The content Web Part can be configured to display any content block from your Ektron CMS400.NET Web site. To do so, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in "Modifying Web Parts" on page 363.
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Content settings**.
3. The Content Web Part Settings page is displayed.
4. Change the value in the **ContentID** field to the ID number of the content block you want to be displayed.
5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated content displayed.
7. Make 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 CMS400.NET Content

As stated earlier, when logged into the Ektron CMS400.NET Web site via SharePoint, you may manage content displayed by the content Web Part (assuming you have permissions to do so within the Ektron CMS400.NET Web site).

Content-related actions you may perform include:

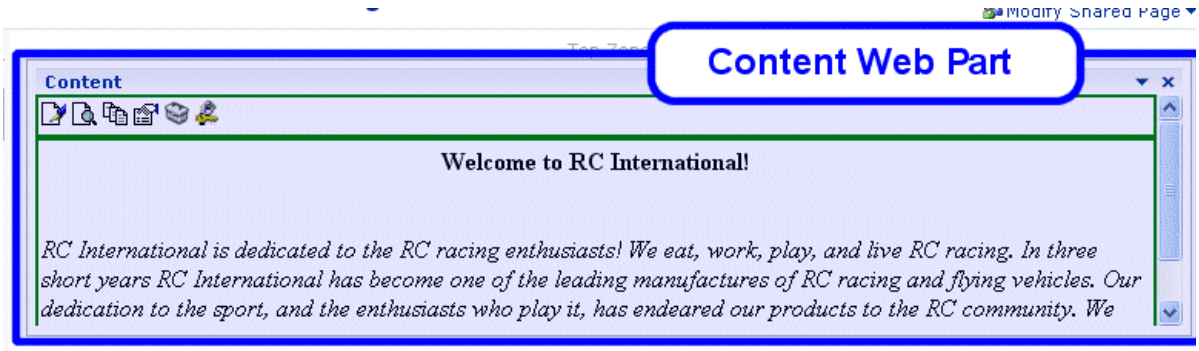
- Editing existing content, summaries, and metadata
- Creating new content
- Deleting content
- Viewing historical versions of content and restoring them
- Managing collections

To manage the Ektron CMS400.NET Web site content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "Login Web Part" on page 379 for more information).

NOTE If the content Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone the content Web Part is in.

2. The content displayed by the content Web Part is surrounded by a colored border.



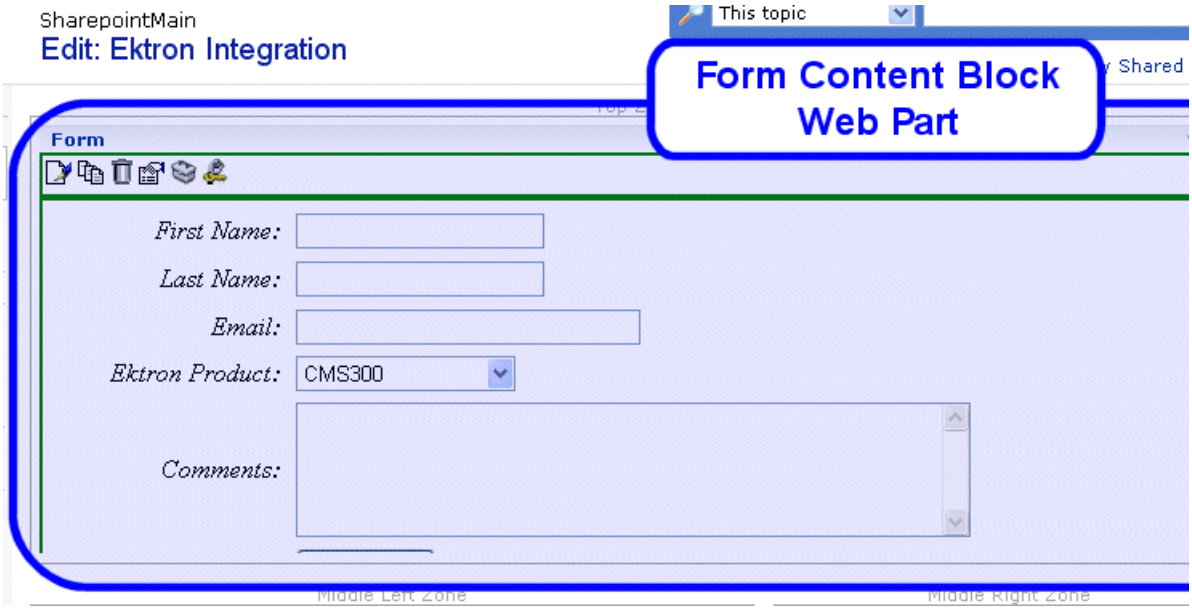
3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access your Ektron CMS400.NET workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET content.

Form Content Block Web Part

A form content block Web Part is used to display an Ektron CMS400.NET form content block.

Here is an example of a form content block being displayed in SharePoint as a Web Part.



If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the form content (see "Managing Ektron CMS400.NET Form Content" on page 374 for more information).

NOTE See "Login Web Part" on page 379 for information about adding a login Web Part and logging into the Ektron CMS400.NET 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 CMS400.NET Web site. To configure one, follow these steps.

1. Access the Modify Shared Web Part area for the form content Web Part, as described in "Modifying Web Parts" on page 363.
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Form Content settings**
3. The Form Content Web Part Settings information is displayed.
4. In the **Form Block ID** field, enter the ID number of the form content block you want to display.
5. Click the **Apply** button for the changes to take effect.

The screen is refreshed with the updated content displayed.

6. Make 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 CMS400.NET Form Content

When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage form content displayed by the form content Web Part (assuming you have permissions to do so within Ektron CMS400.NET).

Some form content related actions that you may perform include

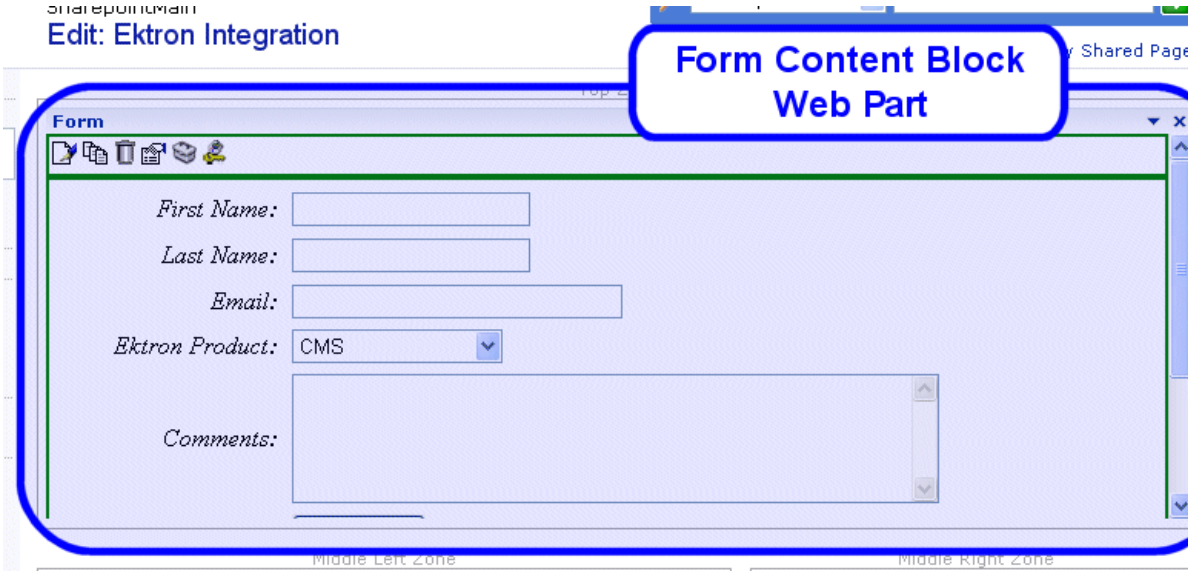
- Editing form content
- Modifying form processing information
- Creating new form content

To manage the Ektron CMS400.NET Web site form content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see ”Login Web Part” on page 379 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 that includes the form Web Part.

2. The form content displayed by the form content Web Part is surrounded by a colored border.



3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access your Ektron CMS400.NET workarea.

Summary List Web Part

The summary list, or list summary, Web Part displays a list of summaries for some, or all, content blocks in a specified Ektron CMS400.NET content folder.

Here is an example of a summary list Web Part being displayed in the SharePoint Portal Server.

If you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can also manage the summary list (see "Managing the Summary List" on page 378 for more information).

NOTE See "Login Web Part" on page 379 for information about adding a login Web Part and logging into the Ektron CMS400.NET 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

To configure the list summary Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in "Modifying Web Parts" on page 363.

2. Minimize the **Appearance Settings**, and expand the **CMS400.NET ListSummary settings**.
3. The List Summary Web Part Settings screen is displayed.
4. Make the necessary changes to the List Summary settings using the following table as a guide.

Field	Description	Default
Starting Folder	Ektron CMS400.NET content folder from which the summary list begins to retrieve summary information. Examples: `\Products\RC Cars` or **** (root content folder)	\
Recursive	Specifies whether the summary list includes information from the starting folder's sub-folders. • **No** - *summary list is not recursive* • **Yes** - *summary list is recursive*	No
Show Summary	Used to specify if the summaries for the content blocks in summary list are displayed. • **No** - *summaries are not displayed* • **Yes** - *summaries are displayed*	No
Style Information	Insert an inline style that is applied to the hyperlinks generated by the summary list. Example: `backgroundcolor:#cccccc; border:solid blue 1pt;`	
Order By	Choose how you want to order the summary list by. • **Title** - title of the content block • **DateModified** - date the content was last modified • **DateCreated** - date the content was created • **AuthorFname** - first name of the last editor • **AuthorLname** - last name of the last editor	Title
Order By Asc/ Desc	Choose how to sort the summary list. • **Asc** - ascending order (A >Z) • **Desc** - descending order (Z>A)	Asc

Field	Description	Default
Show Info	Additional information to display in the summary list. • **None** - *no* additional information • **DateModified** - date and time content was last modified • **DateCreated** - date and time content was created • **AuthorFname** - first name of the last editor • **AuthorLname** - last name of the last editor	None
Maximum Number	Specify the maximum number of results you want to display. Note: Enter zero (**0**) to display unlimited, or all, results.	0 (unlimited)

5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated summary list is displayed.
7. Make 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.

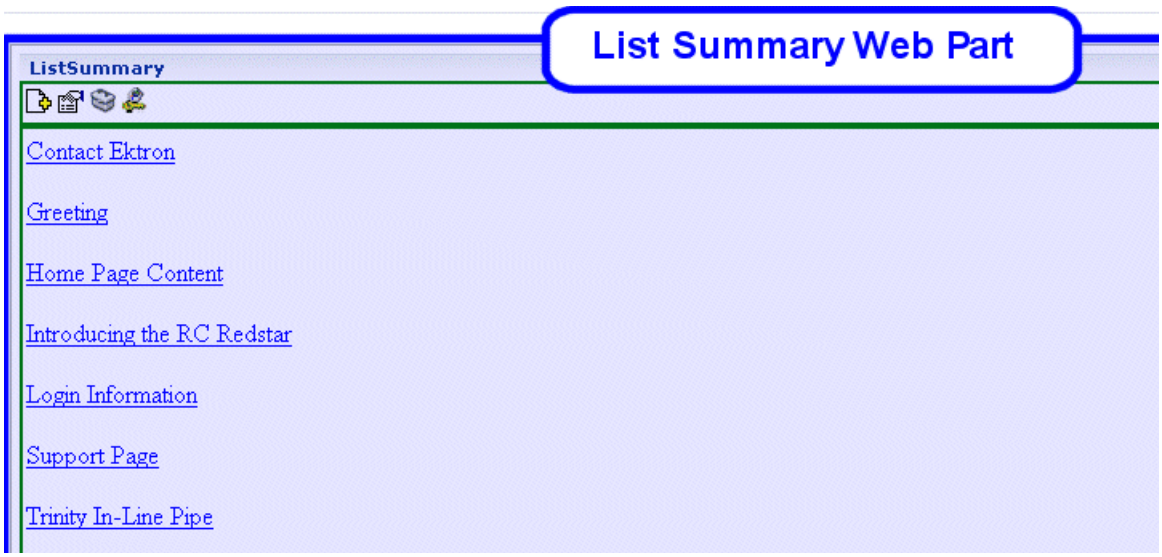
Managing the Summary List

When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage the summary list displayed by the list summary Web Part. To do so, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "Login Web Part" on page 379 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 summary list Web Part's zone.

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

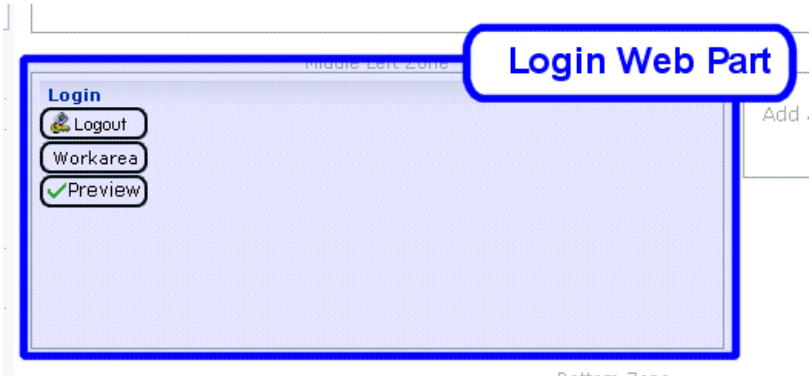


3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access the Ektron CMS400.NET workarea.

Login Web Part

The Login Web Part displays a login button that lets users log in to the Ektron CMS400.NET Web site via SharePoint, and be authorized to work with Ektron CMS400.NET related content.

Here is an example of the login Web Part displayed in the SharePoint portal server.



In this example, the **Logout**, **Workarea**, and **Preview** buttons are displayed because we are currently logged in. If we were not logged in, only **Login** would appear.

Login Web Part Settings

The login Web Part includes no configurable settings.

Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server

You can log in to your Ektron CMS400.NET Web site via SharePoint Portal Server and be authorized to manage content, as well as perform any other action. To log into your Ektron CMS400.NET Web site via SharePoint Portal Server, follow these steps.

1. Navigate to the SharePoint Zone that contains the Ektron CMS400.NET Login Web Part.
2. Click the **Login** button.
3. The Ektron CMS400.NET Login box appears.
4. Enter a valid Ektron CMS400.NET username and password.
5. Click the **Login** button.
6. The username and password are sent to the Ektron CMS400.NET server. Upon successful authorization, you are logged in to Ektron CMS400.NET.

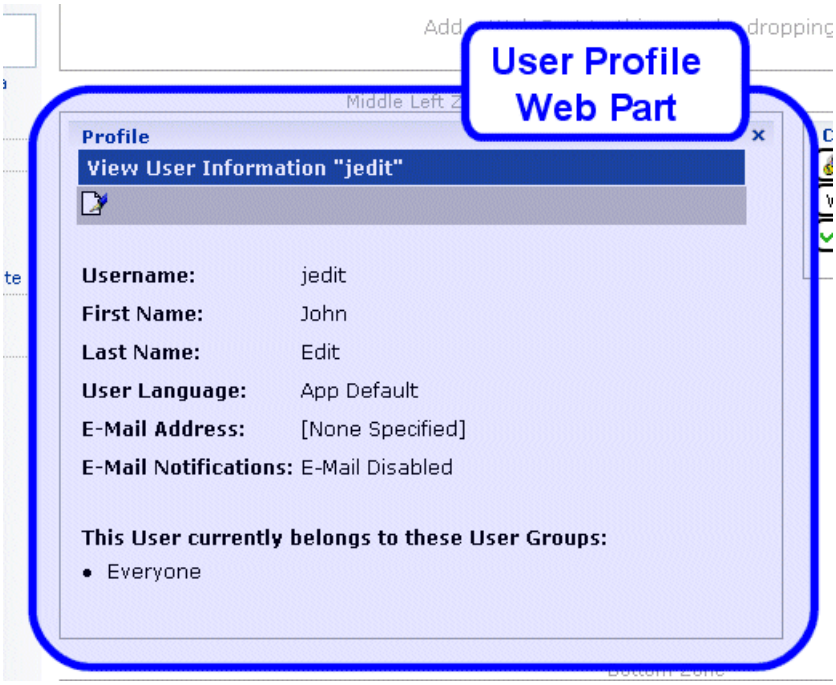
NOTE Logging in via SharePoint does not refresh the entire screen. Instead, only the zone that includes the login Web Part appears to be logged into. Refresh each zone, or the entire screen, for the changes to take effect.

Profile Web Part

Every user of an Ektron CMS400.NET Web site has access to their user profile, which allows them to view and modify information about themselves. When logged into Ektron CMS400.NET via SharePoint, each user can access his profile information.

NOTE See "Login Web Part" on page 379 for additional information about logging in.

Here is the profile Web Part displayed in the SharePoint portal server, logged in as the user **John Edit**.



Although you cannot modify the profile Web Part, you can update your Ektron CMS400.NET user profile information (see "Editing Profile Information" on page 381 for additional information).

Profile Web Part Settings

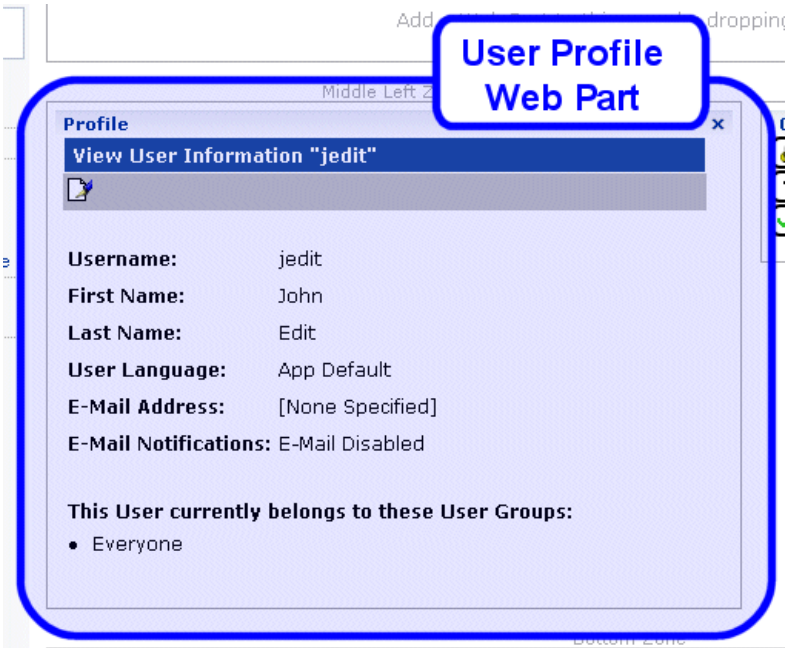
The profile Web Part includes no configurable settings.

Editing Profile Information

All Ektron CMS400.NET users can update their profile information directly from SharePoint. To update Ektron CMS400.NET profile information, follow these steps.

NOTE Before updating profile information, you must be logged in to your Ektron CMS400.NET Web site via SharePoint. See "Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server" on page 380 for more information.

1. Access the SharePoint portal page that contains the Ektron CMS400.NET profile Web Part.



2. Click the Edit button ( ).
3. The Edit User Information screen is displayed.
4. Change your user information.
5. Click the Update button ( ) to save the changes.
6. The Web Part is refreshed, and the view user information screen is displayed with the updated information.

Search Web Part

The search Web Part lets you insert a search text box and search button that search your Ektron CMS400.NET Web site from SharePoint.

Here is an example of a search Web Part inserted into a SharePoint portal server screen.

When visitors to the SharePoint portal page access this search Web Part, they can perform a search on your Ektron CMS400.NET Web site.

Search Web Part Settings

You can configure the search Web Part to fully customize how the search is displayed in the portal, as well as the search's functionality. Several options are configurable, including:

- Starting folder
- Recursive search
- Maximum amount of results to display

To configure the search Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in "Modifying Web Parts" on page 363.
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Search settings**.
3. The Search Web Part Settings screen is displayed.

4. Make the necessary changes to the search settings using the following table as a guide.

Field	Description	Default
Starting Folder	Ektron CMS400.NET content folder where the search begins to retrieve results from. Examples: `\Products\RC Cars` or **** (root content folder)	\
Recursive	Specifies whether the search looks through the starting folder and its sub-folders *or* the starting folder only • **No** - search only the starting folder • **Yes** - search starting folder and its sub-folders	No
Target Page	The Web page that contains the results of the search.	search-display.aspx
Text Box Size	The size of the search text box when displayed.	25
Maximum Characters	The maximum number of characters the search text box accepts.	200
Button Text	The text displayed on the search button.	Search
Font Face	The font style of the search box options.	Verdana
Font Color	The font color of the search box options.	#808080
Font Size	The font size of the search box options.	2
Horizontal	The orientation of the search text box and options. • **No** - search options align vertically • **Yes** - search options align horizontally	No
Return: Maximum Results	Determines the maximum number of search results displayed. Note: Enter zero (0) to display unlimited, or all, results.	0
Return: Style Info	An inline style that is applied to search result hyperlinks. For example: `backgroundcolor:#cccccc; border:solid blue 1pt;`	
Return: Show Date	Specify whether the search results will display the date and time they were last edited.	No

5. Click the **Apply** button.
6. The screen is refreshed, and the updated search Web Part is displayed.
7. Make additional changes to the search Web Part, or click the **OK** button 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 do so, follow these steps:

1. Access the SharePoint portal page that contains the Ektron CMS400.NET search Web Part.

2. Enter search criteria in the search text box.
3. Click **Search.**
4. The search is performed, and all content blocks in your Ektron CMS400.NET Web site that match the criteria appear.

Web Services

Web Services are reusable software components that can be consumed over the Web by means of standard Internet technologies. Mechanisms exist to publish and discover Web Services on the Web, allowing users to locate and integrate them into their applications.

A Web Service is comprised of one or more methods that expose functionality. A Web Service can be thought of as an Application Program(ming) Interface (API), the one big difference being, consumers can access the service using Simple Object Access Protocol (SOAP) over HTTP.

SOAP is an XML based lightweight protocol that defines the message format for Web Services, which allows heterogeneous systems to communicate with each other in a standard way. Seeing Web Services are based on ubiquitous technologies, they have been quickly accepted for the interchange of data.

For information about implementing Ektron CMS400.NET's Web services support for your Web site, refer to Web Services in the Ektron CMS400.NET *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 CMS400.NET, 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 CMS400.NET as RSS, refer to Syndicating Web Content as RSS, in the Ektron CMS400.NET *Developer's Reference Manual.*

JavaScript Syndication

With the help of some JavaScript, Ektron CMS400.NET now allows you to receive syndicated content from a server other than the one Ektron CMS400.NET 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 .aspx page that Ektron CMS400.NET runs with.

This concept will be discussed and explored in the following sections.

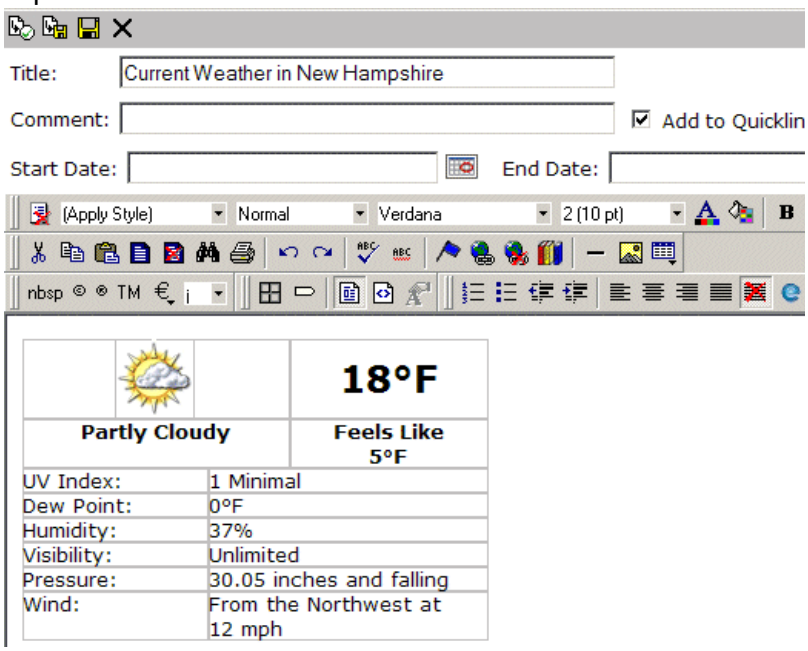
What is Syndication?

Using JavaScript syndication on a static HTML-based Web site, Web site allows you to retrieve content from an Ektron CMS400.NET Web site and post it on your Web site. When the content gets updated on the Ektron CMS400.NET Web site, it is updated on the static HTML page as well.

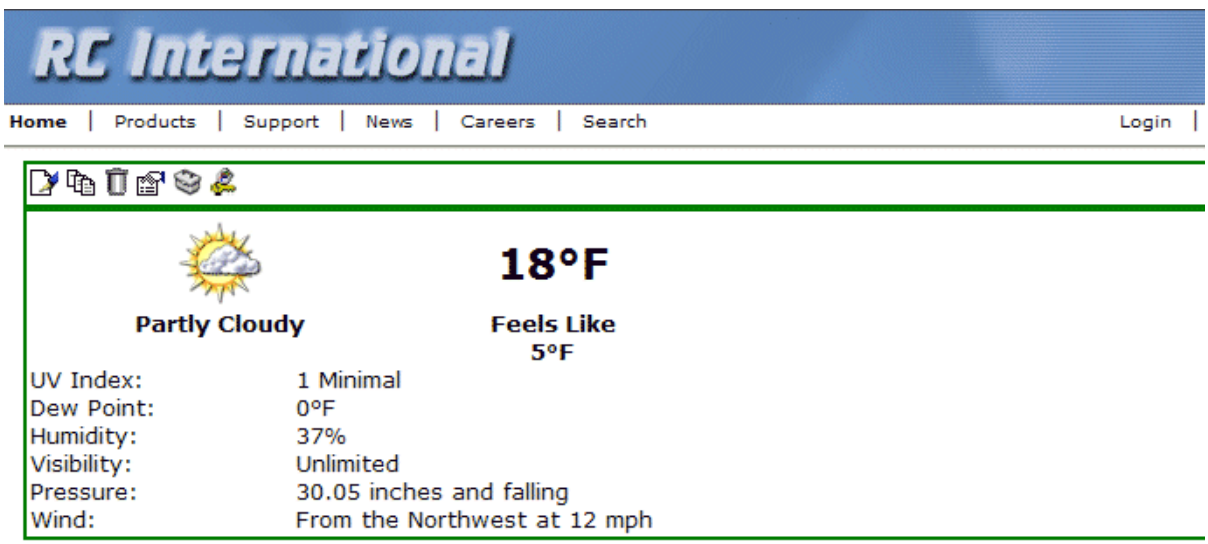
Syndication Example

This example uses the sample Ektron CMS400.NET Web site and a blank static HTML page to display the syndicated content.

Let's begin by creating a new content block in Ektron CMS400.NET and enter content about the current weather for New Hampshire.



After we create content, we can publish it so that it is live on the Ektron CMS400.NET Web site.



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.

Below is the code for the HTML page that we will create.

```
<HTML>

    <HEAD>

        <TITLE>Weather</TITLE>

    </HEAD>

    <BODY>

        <script language="javascript src="http://192.168.0.156/

        CMS400.NETSample/CMS400.NETscripts/jsyndication.aspx?id=19"></script>

    </BODY>

</HTML>
```

In this code, the source (src) of the script is made up of three parts:

- The path of the Ektron CMS400.NET Web site

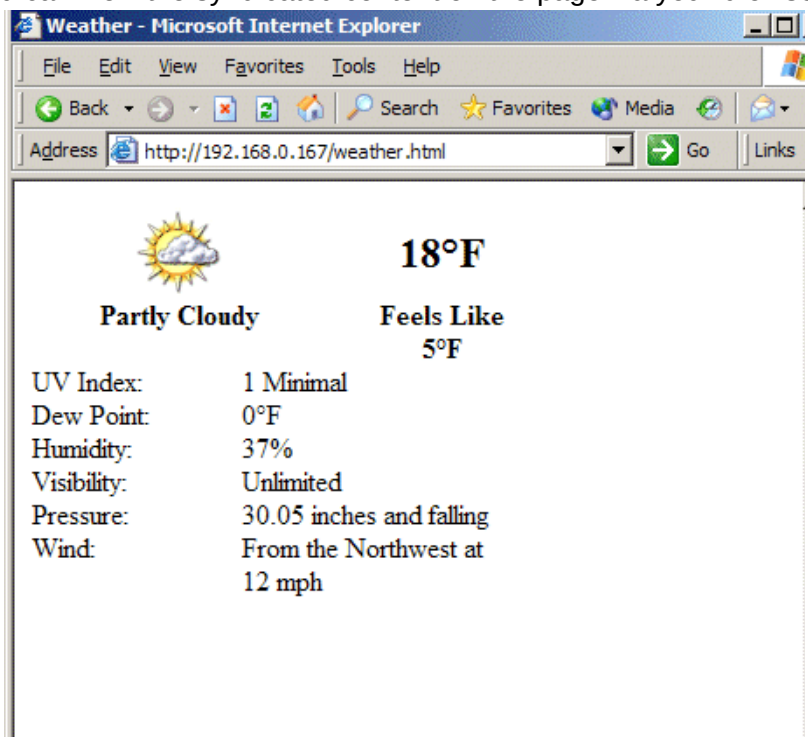
  http://192.168.0.111/CMS400.NETSample/CMS400.NETscripts/
- The syndication template

  jsyndication.aspx
- The content ID number that will be displayed.

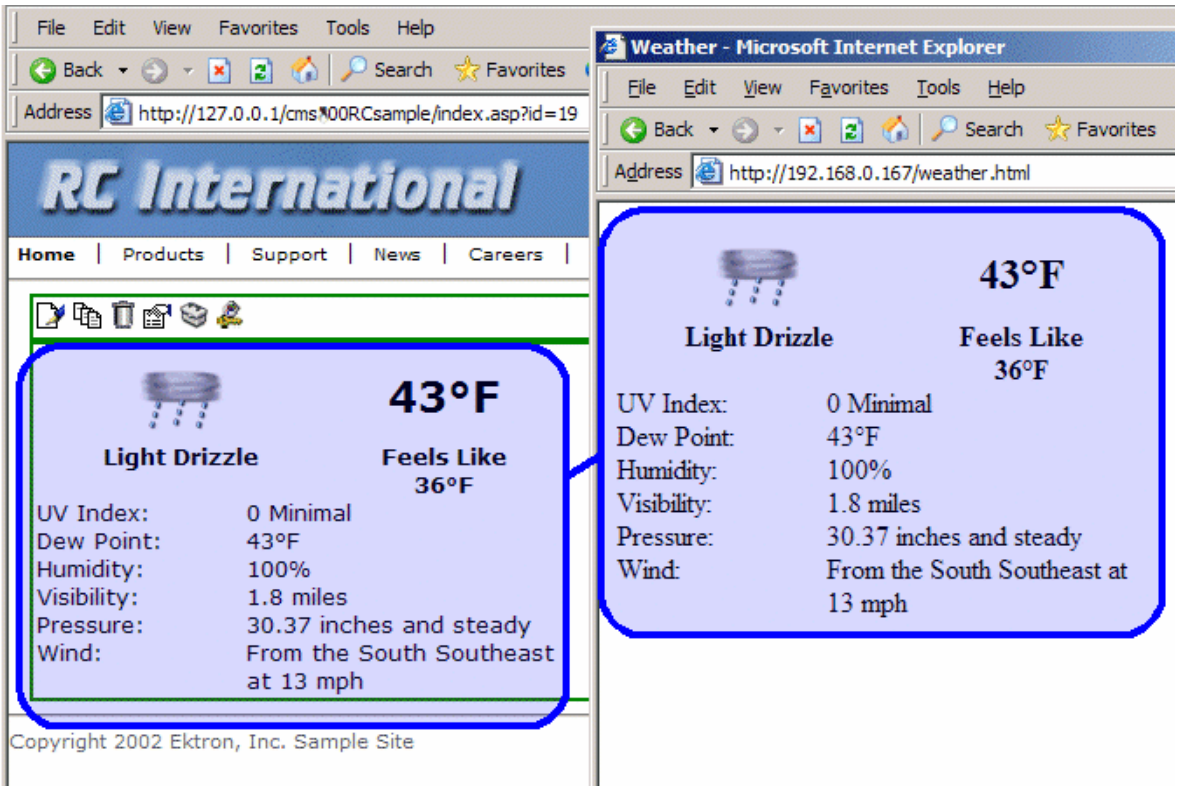
  ?ID=19

NOTE Each page that displays a syndicated content block *must* have all three parts of the JavaScript 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 CMS400.NET 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 CMS400.NET 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 CMS400.NET that has the following custom tag inserted in it, and nothing else.

```
<%option explicit%>

<!-- #include file=" web.config" -->

<%

dim currentUserID, jsObj

Dim cConts, conObj

Dim ErrString, id, Site


IF (request.cookies("ecm").HasKeys) THEN

 currentUserID = request.cookies("ecm")("user_id")

 Site = request.cookies("ecm")("site_id")

else

 currentUserID=0

 Site = ""

end if
```

```
Set jsObj = CreateObject("Scripting.Dictionary")

jsObj.Add "Browser" , Request.ServerVariables("http_user_agent")

jsObj.Add "ServerName" , Request.ServerVariables("SERVER_NAME")

jsObj.Add "ResolveImgPath" , TRUE

jsObj.Add "ResolveHrefPath" , TRUE

jsObj.Add "jsPath",Request.ServerVariables("HTTP_REFERER")

jsObj.Add "ContentID", Request.QueryString("id")

Set conObj = CreateObject("EkBrMach4Content.EkMach4Content")

if (Request.QueryString("id") <> "") then

Set cConts = conObj.jSyndication(AppConfStr, currentUserID, jsObj, Site, ErrString)

if (cConts.Count) then

%>

document.writeln('<% Response.write(
Replace(cConts("ContentHtml"),chr(13),"');document.writeln('") ) %>');

<%

end if

end if

Set jsObj = nothing

%>
```

Ektron CMS400.NET provides a special template named **jsyndication.aspx**. This template has no images, just the custom tag seen above. It is all that is needed to allow other servers to display your content.

Load Balancing

Setting up load balance path via Ektron CMS400.NET is easy to do using the interface supplied in the Library management section of the Administrator workarea.

NOTE Refer to "Load Balancing" on page 117 for additional information about setting up load balance paths in Ektron CMS400.NET.

Why Do I Need Load Balancing?

When used properly, load balancing is an extremely efficient and time saving tool for your Ektron CMS400.NET driven Web site. Instead of uploading an 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 CMS400.NET.

How Do I Configure Load Balancing?

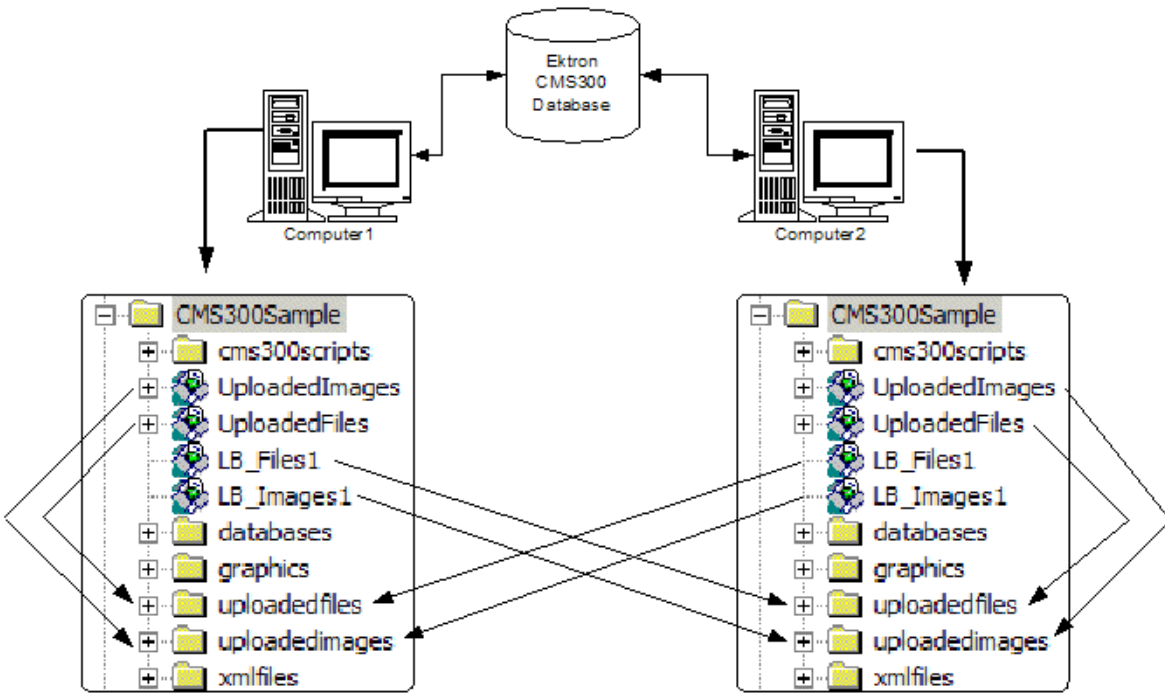
Setting up Ektron CMS400.NET for load balancing requires additional setting up outside of Ektron CMS400.NET. Some actions you need to perform include:

- Setting up Ektron CMS400.NET 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 CMS400.NET as described in "Load Balancing" on page 117

The following chapter looks at the configurations that must be made to your Web servers for load balancing to work efficiently and properly.

Ektron CMS400.NET On Two Machines

Displayed in the following diagram is how the IIS consoles will be set up for load balancing on two Ektron CMS400.NET Web servers.



As you can see, there are two Ektron CMS400.NET 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 CMS400.NET and two Web server machines.

Setting Up Multiple Ektron CMS400.NET Web Sites

For an identical Ektron CMS400.NET 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 CMS400.NET on each of the Web server machines that will be part of the Web site.

NOTE Refer to the Ektron CMS400.NET *Setup Manual, Version 4.7, Revision 9* for additional information on performing an install.

2. Single out one of the databases that is installed, and use that as your master Ektron CMS400.NET 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 theweb.config, for each Web site, to use that DSN, Provider string, or file string.

If performed correctly, each Ektron CMS400.NET 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.

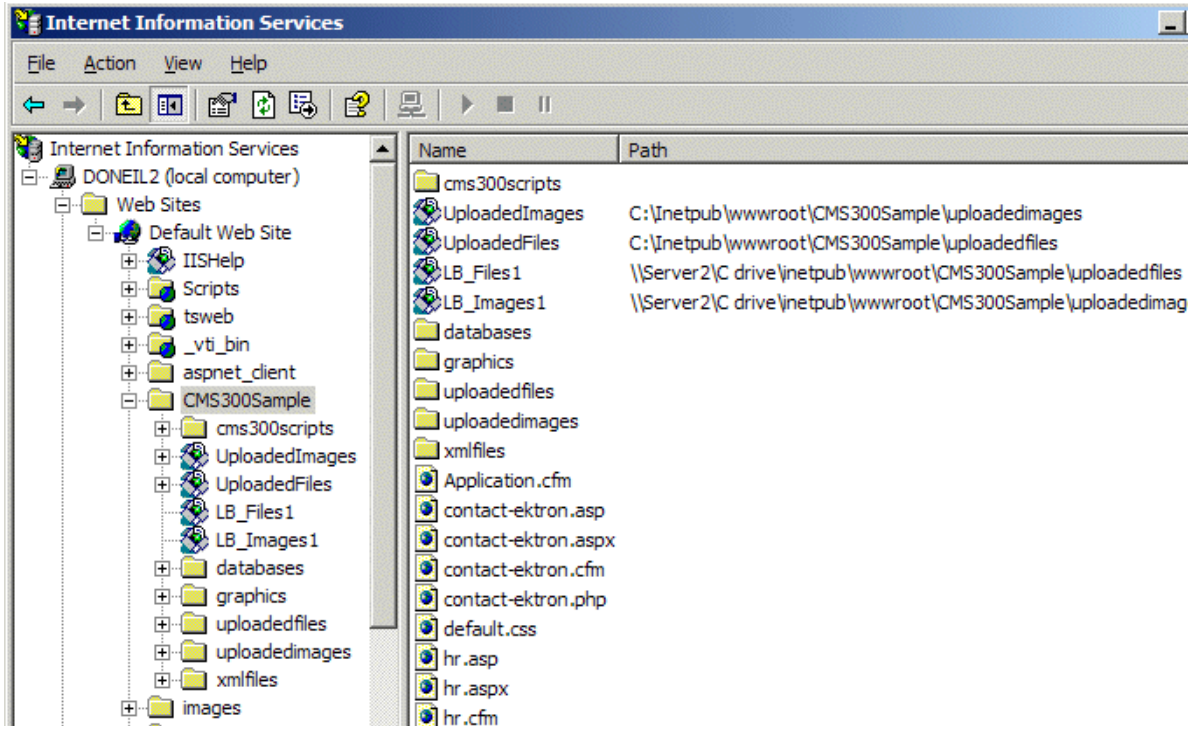
For our example, we will be creating the following virtual directories on both Ektron CMS400.NET Web server machines

Virtual Directory	Points to
UploadedImages	Default UploadedImages folder installed by Ektron CMS400.NET on the Web Server.
UploadedFiles	Default UploadedFiles folder installed by Ektron CMS400.NET on the Web server.
LB_Images1	UploadedImages folder installed on the second Ektron CMS400.NET Web server.
LB_Files1	UploadedFiles folder installed on the second Ektron CMS400.NET Web server.

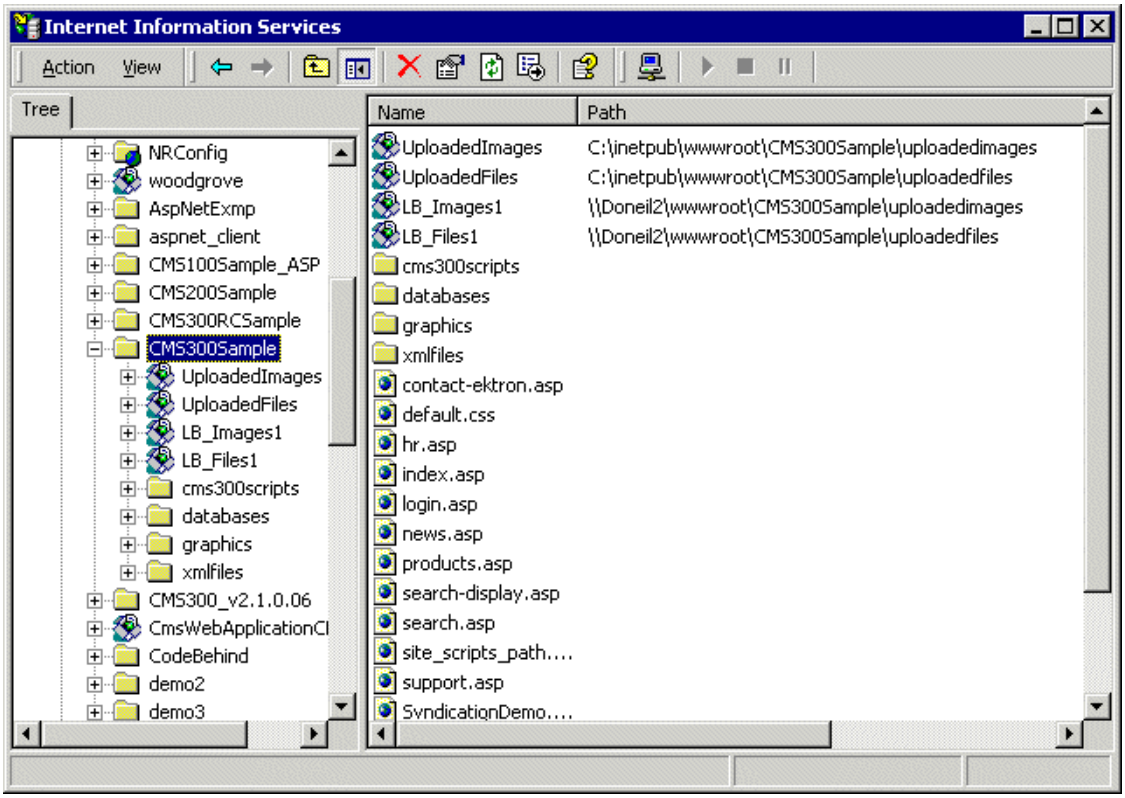
These four identical virtual directories must exist in the IIS console for each Web server machine used in your load balancing model.

Displayed below is how the two machines should be configured.

IIS on Computer1



IIS on Computer2



Why Must the Virtual Directory Names Be Identical?

The virtual directory names must be identical because, when the load balance paths are created in Ektron CMS400.NET, they are stored in one database. The names of the load balance paths in Ektron CMS400.NET are unique, but depending on the Web server machine that a user is on, IIS resolves 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 CMS400.NET is called LB_Images1. Ektron CMS400.NET talks to IIS and resolves the path for the virtual directory LB_Images1 which happens to be `\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages`.

However, if the Web site is being accessed from the other Web server machine, the load balance path LB_Images1 is pointing to

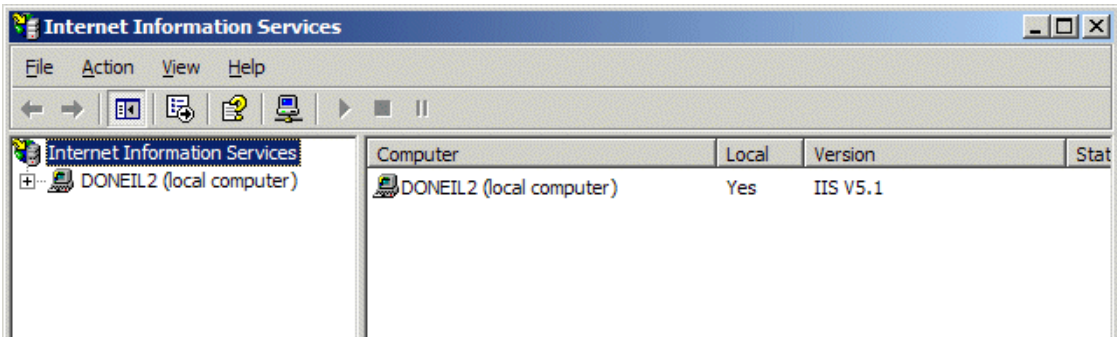
the physical directory
`\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages`.

In order for the load balancing model to work correctly, the virtual directories located on each Web server must be identical!

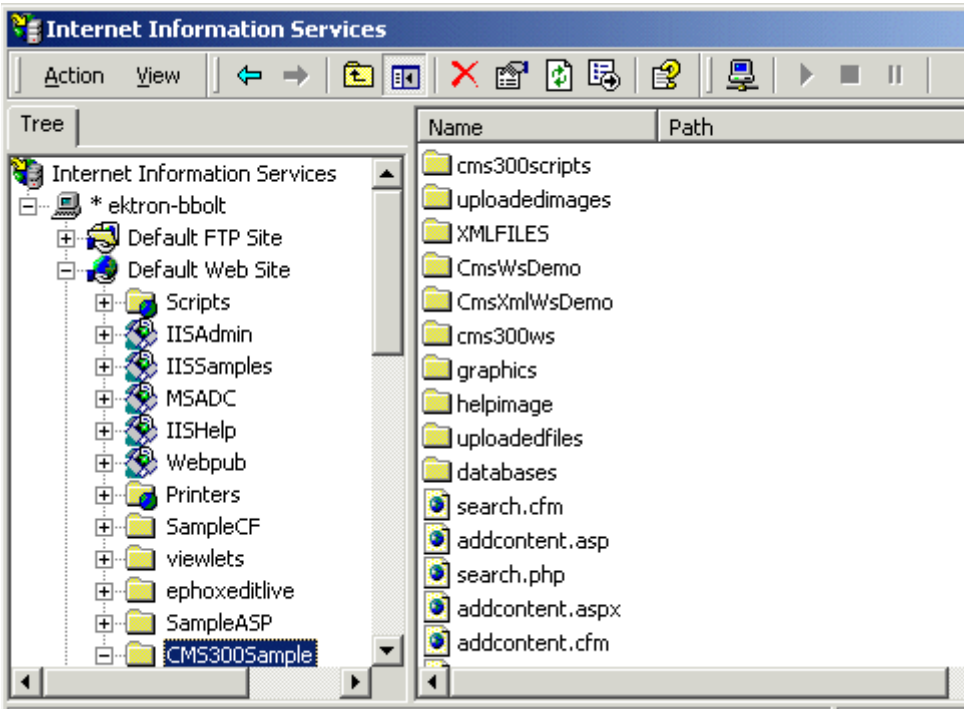
Creating a Virtual Directory

This section explains the steps needed to create a virtual directory in IIS. To create a virtual directory:

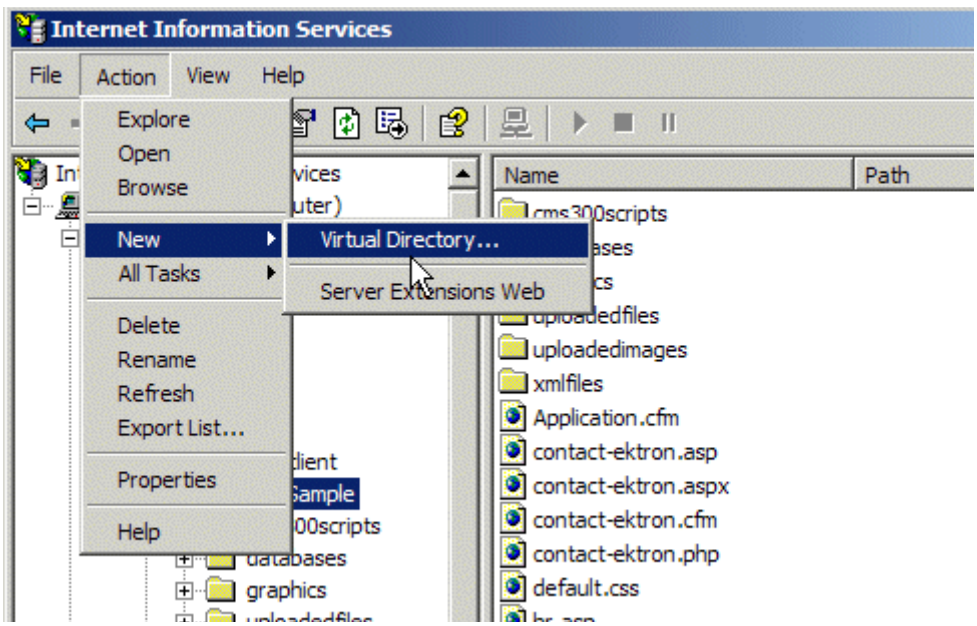
1. Access your IIS management console.



2. In the folder tree on the left side of the console, navigate to the Ektron CMS400.NET Site root folder. In this case, it is CMS400.NETSample.



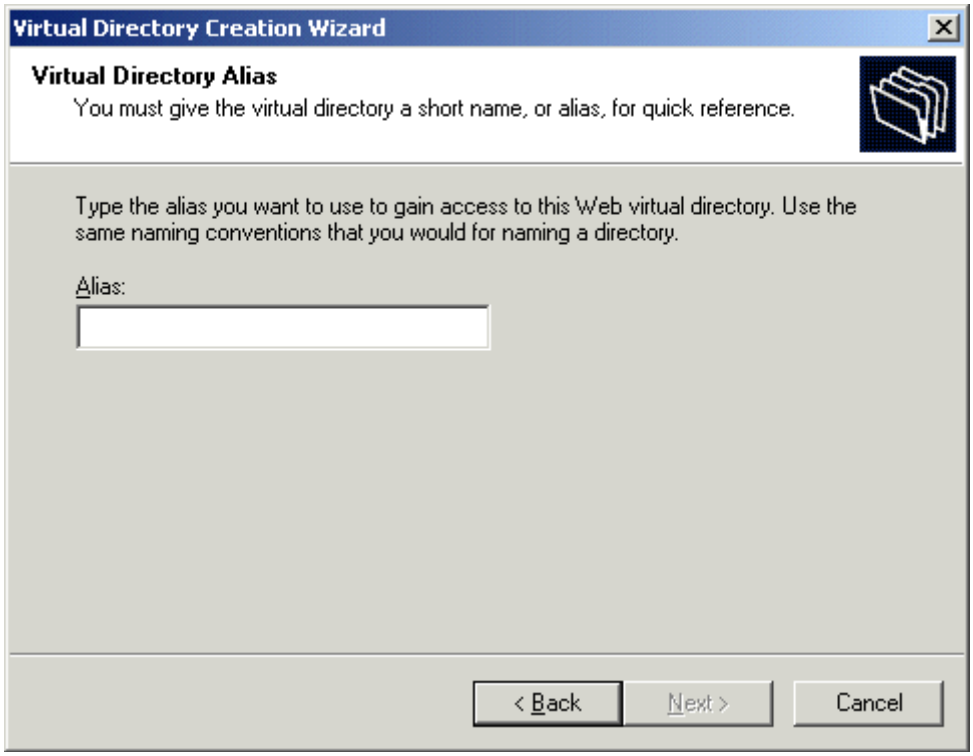
3. In the toolbar at the top of the screen, follow the path **Action > New > Virtual Directory...**



4. The Virtual Directory Creation Wizard is displayed.

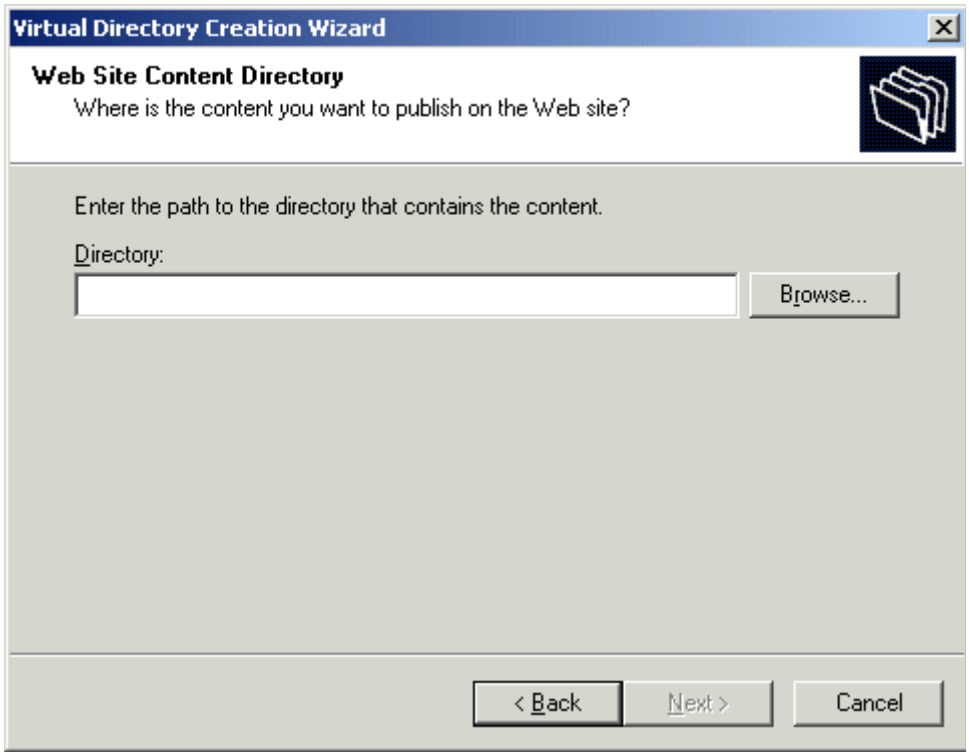
5. Click **Next** to proceed.

6. The Virtual Directory Alias screen is displayed.



7. Enter an alias for the virtual directory. This name will reference the virtual directory in Ektron CMS400.NET.
8. Click **Next** to continue.

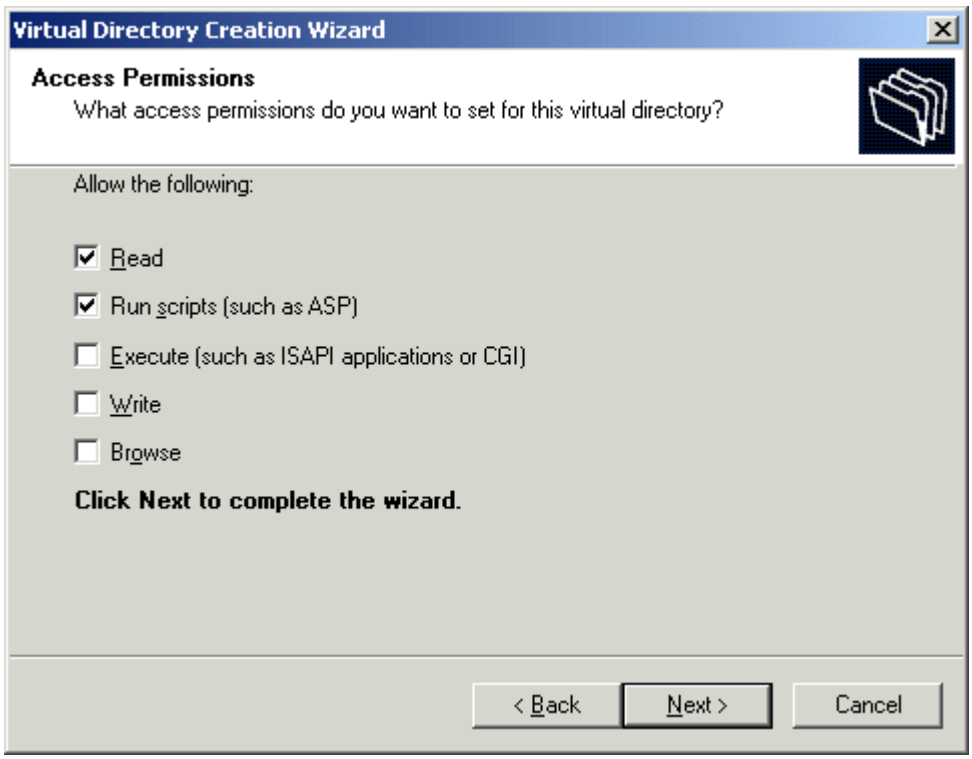
9. The Web Site Content Directory screen is displayed.



10. Enter the path to the directory to be used for the virtual directory, or click the **Browse** button to locate it.

NOTE The path is constructed using \\{ComputerName}\{FilePath} format.

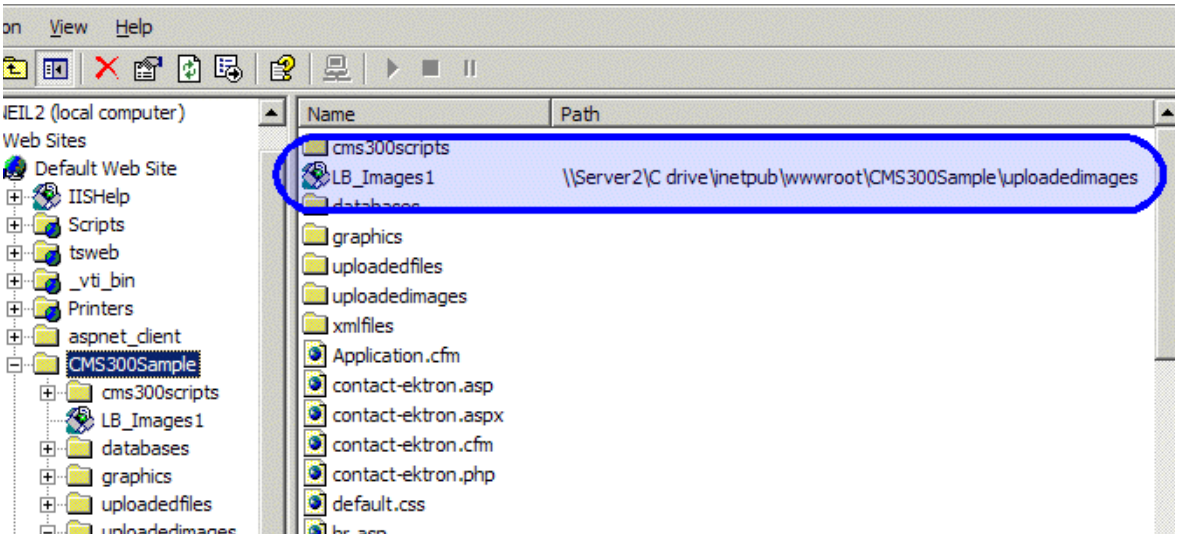
11. Click **Next** to continue.
12. Check off the permissions that you want to allow for the virtual folder.



NOTE At a minimum, the IIS user needs read and write permissions.

13. Click **Next** to complete the wizard.
14. A confirmation notifies you that you have created a virtual directory. Click the **Finish** button to close the window.

15. The IIS console is displayed with the virtual directory added to the specified location.



16. Repeat the above steps for each virtual directory that you need to create on each Web server running Ektron CMS400.NET.

NOTE Remember, the names of the virtual directories on each server *must* be identical!

Setting Up Ektron CMS400.NET Load Balancing

After setting up the virtual directories on both Web server machines, you are ready to create the load balance paths in Ektron CMS400.NET.

Review

Before we begin, let's review the virtual directories that have been created.

Computer1	
Virtual Directory	**Points to...**
UploadedImages	`C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages`
UploadedFiles	`C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles`

Computer1	
Virtual Directory	**Points to...**
LB_Images1	`\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Images`
LB_Files2	`\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Files`

Computer2	
Virtual Directory	**Points to...**
UploadedImages	`C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages`
UploadedFiles	`C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles`
LB_Images1	`\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Images`
LB_Files2	`\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Files`

Setting Up Load Balance Paths in Ektron CMS400.NET

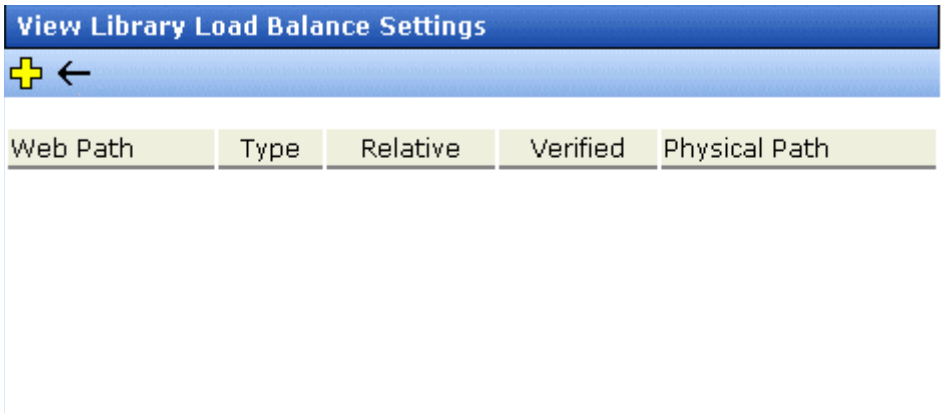
In this section, we set up load balance paths in Ektron CMS400.NET that point to the LB_Images1 and LB_Files1 virtual directories that we created earlier.

NOTE For additional information about working with load balance paths in Ektron CMS400.NET, refer to ”Load Balancing” on page 117.

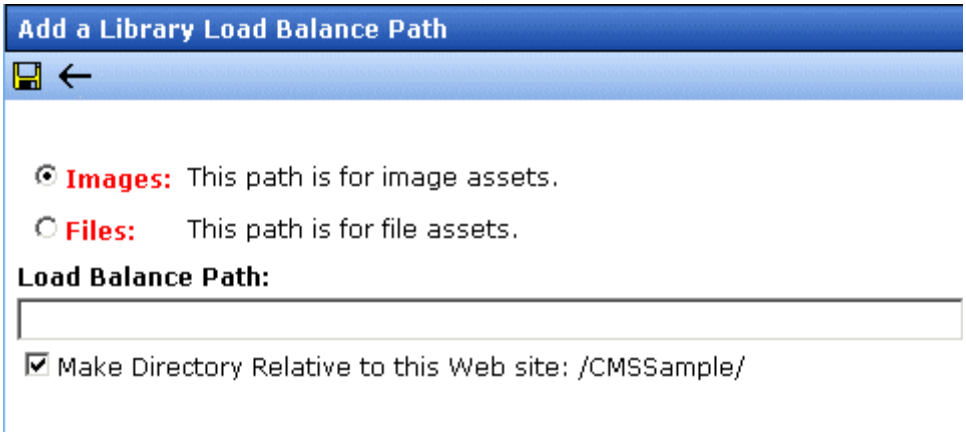
To add a load balance path in Ektron CMS400.NET:

1. Log in to an Ektron CMS400.NET Web site that you set up in ”Setting Up Multiple Ektron CMS400.NET Web Sites” on page 396, as an administrator.

2. Access the load balance settings screen in the library folder as described in "Accessing Library Load Balancing Screen" on page 118.



3. Click the Add button ( ).
4. The Add a Library Load Balancing Path screen is displayed.



5. Use the following table to help you fill out the form.

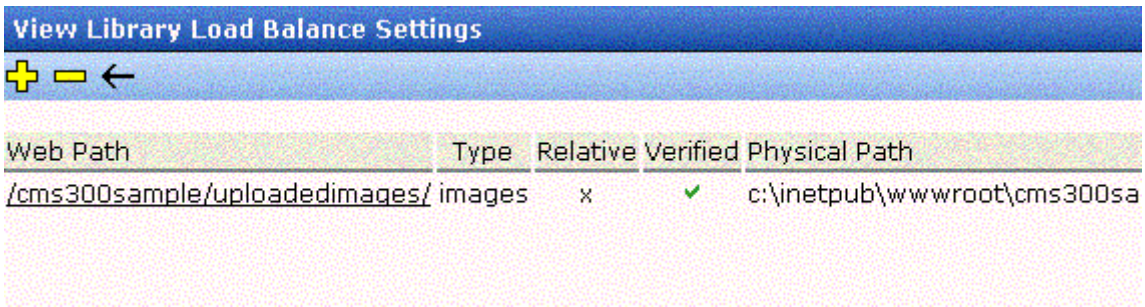
Field	Description
Images/Files	Specify if the load balance path folder will be for images or files.
Load Balance Path	Enter the path of the folder.
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS400.NET site root, check off the box to make the path relative to that. Otherwise, remove the check if the path is not relative to the site path.

6. Click the Save button ( ) to save and add the new load balance folder to the Ektron CMS400.NET library.

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

   Notice that there is a green check. The green check notifies you that IIS on the current Web server machine you are on has successfully resolved the virtual directory and located the physical folder it points to.

7. To further verify the load balance path is working successfully, let's look at the view library load balance setting screen in the workarea for the other Ektron CMS400.NET Web server machine.



   Notice that the two Web path names are identical, but the physical paths are different. This proves that IIS resolved each one differently on each machine.

What Now?

Once you have successfully configured your load balancing model for your Ektron CMS400.NET 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 CMS400.NET.

Ektron CMS400.NET On Three Machines

This section examines a Web site driven by Ektron CMS400.NET and three Web servers.

Setting Up Multiple Ektron CMS400.NET Web Sites

To run an identical Ektron CMS400.NET Web site on three machines, you must use the same database for each site. To do this:

1. Install the Ektron CMS400.NET .exe file on each Web server that will be part of the Web site.

NOTE Refer to the Ektron CMS400.NET Setup Manual for additional information on performing an install.

2. Identify one installed database and use that as your master Ektron CMS400.NET database. Each Web site points to this database for content, users, and load balance paths.
3. Create an ODBC or OLE DB connection to that database, and edit theweb.config file for each Web site to use that DSN, Provider string, or file string.

If performed correctly, each Ektron CMS400.NET 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, create virtual directories for each image or file folder that will be used with your load balancing model. In addition, it is recommended that you change the default UploadedImages and UploadedFiles' directories to virtual directories as well.

For our example, we create the following virtual directories on all Ektron CMS400.NET Web servers.

Virtual Directory	Description
UploadedImages	Virtual directory that will point to the default UploadedImages folder that is installed by Ektron CMS400.NET on the Web Server.
UploadedFiles	Virtual directory that will point to the default UploadedFiles folder that is installed by Ektron CMS400.NET on the Web server.
LB_Images1	Virtual directory that will point to the UploadedImages folder that is installed on the second Ektron CMS400.NET Web server machine.

Virtual Directory	Description
LB_Files1	Virtual directory that will point to the UploadedFiles folder that is installed on the second Ektron CMS400.NET Web server machine.
LB_Images2	Virtual directory that will point to the UploadedImages folder that is installed on the third Ektron CMS400.NET Web server machine.
LB_Files2	Virtual directory that will point to the UploadedFiles folder that is installed on the third Ektron CMS400.NET Web server machine.

Keep in mind that these four, identical virtual directories 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 400 for information about creating virtual directories in IIS.

Setting Up Ektron CMS400.NET 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 CMS400.NET.

Review

Before we begin, let’s review the virtual directories that have been created:

Computer1	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images1	\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages

Computer1	
Virtual Directory	**Points to...**
LB_Files1	\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images2	\\{Computer3}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files2	\\{Computer3}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles

Computer2	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files1	\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images2	\\{Computer3}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files2	\\{Computer3}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles

Computer3	
Virtual Directory	**Points to...**
UploadedImages	C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages

Computer3	
Virtual Directory	**Points to...**
UploadedFiles	C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files1	\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images2	\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files2	\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles

Setting Up Load Balance Paths in Ektron CMS400.NET

Refer to ”Setting Up Load Balance Paths in Ektron CMS400.NET” on page 407 for information about how to configure Ektron CMS400.NET for load balancing.

What Now?

Once you have successfully configured your load balancing model for your Ektron CMS400.NET 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 CMS400.NET.

URL Aliasing

Introduction

Aliasing is a feature of **Ektron CMS400.NET** that lets you change the name of your Web site's pages. By default, **Ektron CMS400.NET** Web pages have the following format:

See Also: "Forming URLs For Ektron CMS400.NET Documents" on page 54

Sometimes, you want to change a page's name. The Aliasing feature offers two ways to do this:

- **Ektron CMS400.NET** can automatically change each page's name to a format that search engines more easily recognize. This is called *Automatic Aliasing*.
- You can manually change the name of any page to whatever you wish. For example, you can change the name of your technical support page to //www.*YourEktronwebsite*.com/help.htm from //www.*YourEktronwebsite*.com/help.aspx?id=27. This is called *Manual Aliasing*.

NOTE When using Manual Aliasing, you cannot alias the root of your Web site (for example, www.*yourEktronWebsite*.com). You can, however, alias everything after that.

This chapter explains how to alias pages on your Web site through the following topics.

- "Automatic vs. Manual URL Aliasing" on page 415

- ”Automatic URL Aliasing” on page 415
- ”Manual Aliasing” on page 418

Automatic vs. Manual URL Aliasing

Automatic URL Aliasing cleans up special characters that are found in a regular Ektron CMS400.NET URL. With Automatic URL Aliasing, you can alias all content blocks at once. For more information on Automatic URL Aliasing, see ”Automatic URL Aliasing” on page 415

Manual URL Aliasing lets you choose the URL and extension that you would like to use. With Manual URL Aliasing, you must assign an alias to each content block individually. You can also assign multiple aliases to a content block then pick one to be a primary alias.

For more information on Manual URL Aliasing, see ”Manual Aliasing” on page 418.

Automatic URL Aliasing

People looking for information on your Web site typically use search engines (such as Google.com) to find pages with the desired content. On rare occasions, some search engines may not work as well with the URL parameters that make up an **Ektron CMS400.NET** Web page name.

If this becomes a problem, use the Automatic URL Aliasing feature, which creates a page name that search engines can easily recognize. The new name includes the template and the page's ID values.

When you use the Automatic URL Aliasing feature, **Ektron CMS400.NET** makes the following changes.

- A delimiter of `ekt` indicates the start of each parameter
- URL parameters follow each delimiter

Here is an example of aliasing a content block.

Original URL

```
/400Intranet/mycalendars.aspx?id=2&calendar_id=1&eky=2003&ekm=9
```

Aliased version

```
/400Intranet/mycalendars_ektid2_ektcalendarid1_ekteky2003_ektekm9.aspx
```

Automatic Aliasing involves the installation of an ISAPI filter, which examines and modifies the URL. So, a small amount of additional resources may be used to help tread through a filter for every request.

Enabling Automatic URL Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it.

NOTE Before editing your web.config file, you should close all open browsers. In some instances, you may need to do an IIS reset.

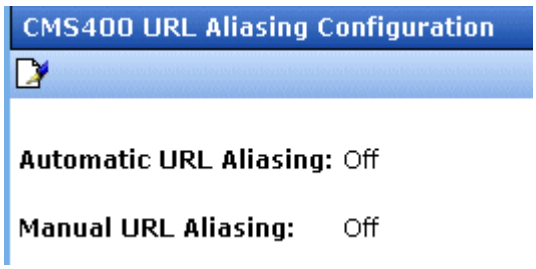
1. Open the web.config file, located in your Web site's root folder.
2. Change the value of `ek_RedirectorInstalled` to **True**.

Activating/Deactivating the Aliasing Feature

To activate the automatic aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

NOTE If you do not see a **URL Aliasing** option under **Configuration**, see "Enabling Automatic URL Aliasing" on page 416.

The screen indicates if automatic aliasing is currently on or off. To change its state, click the Edit button ( ), check or uncheck the box, and click the Save button ( ).

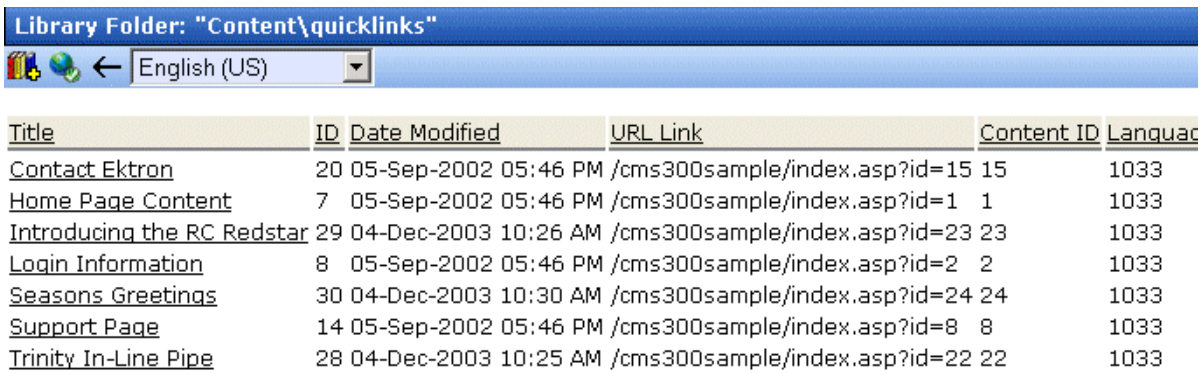


If **Automatic Aliasing** is turned on and you uncheck it, your page URLs return to their original format (see "Sample Quicklinks Folder with URL Aliasing Turned Off" on page 417).

Effect of Activating Automatic URL Aliasing

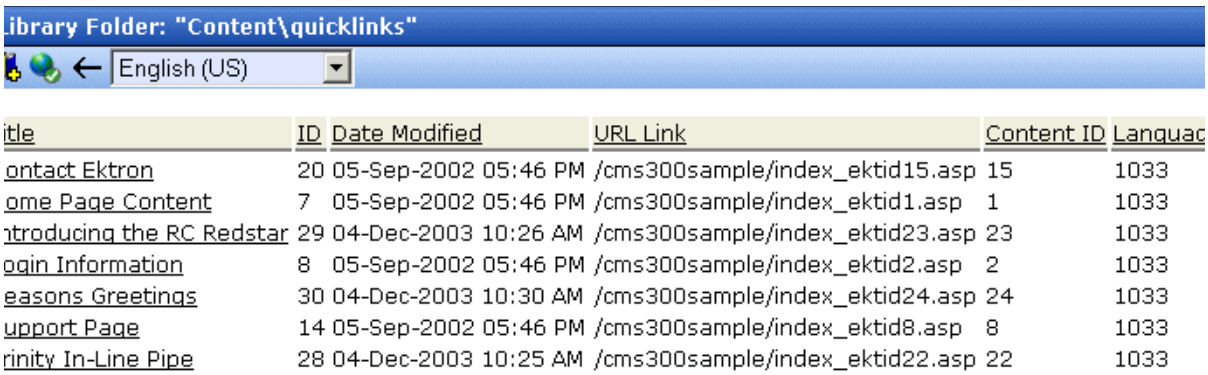
When you enable automatic URL aliasing, the feature updates every quicklink in your **Ektron CMS400.NET** library to the new format. This may take a few moments.

Sample Quicklinks Folder with URL Aliasing Turned Off



Title	ID	Date Modified	URL Link	Content ID	Languac
Contact Ektron	20	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=15	15	1033
Home Page Content	7	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=1	1	1033
Introducing the RC Redstar	29	04-Dec-2003 10:26 AM	/cms300sample/index.asp?id=23	23	1033
Login Information	8	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=2	2	1033
Seasons Greetings	30	04-Dec-2003 10:30 AM	/cms300sample/index.asp?id=24	24	1033
Support Page	14	05-Sep-2002 05:46 PM	/cms300sample/index.asp?id=8	8	1033
Trinity In-Line Pipe	28	04-Dec-2003 10:25 AM	/cms300sample/index.asp?id=22	22	1033

Sample Quicklinks Folder with URL Aliasing Turned On



itle	ID	Date Modified	URL Link	Content ID	Languac
ontact Ektron	20	05-Sep-2002 05:46 PM	/cms300sample/index_ektid15.asp	15	1033
ome Page Content	7	05-Sep-2002 05:46 PM	/cms300sample/index_ektid1.asp	1	1033
ıtroducing the RC Redstar	29	04-Dec-2003 10:26 AM	/cms300sample/index_ektid23.asp	23	1033
ogin Information	8	05-Sep-2002 05:46 PM	/cms300sample/index_ektid2.asp	2	1033
easons Greetings	30	04-Dec-2003 10:30 AM	/cms300sample/index_ektid24.asp	24	1033
upport Page	14	05-Sep-2002 05:46 PM	/cms300sample/index_ektid8.asp	8	1033
rinity In-Line Pipe	28	04-Dec-2003 10:25 AM	/cms300sample/index_ektid22.asp	22	1033

The aliasing feature does not review quicklinks embedded in your content blocks -- these maintain their original format. When a user or site visitor is navigating through **Ektron CMS400.NET**, either format works.

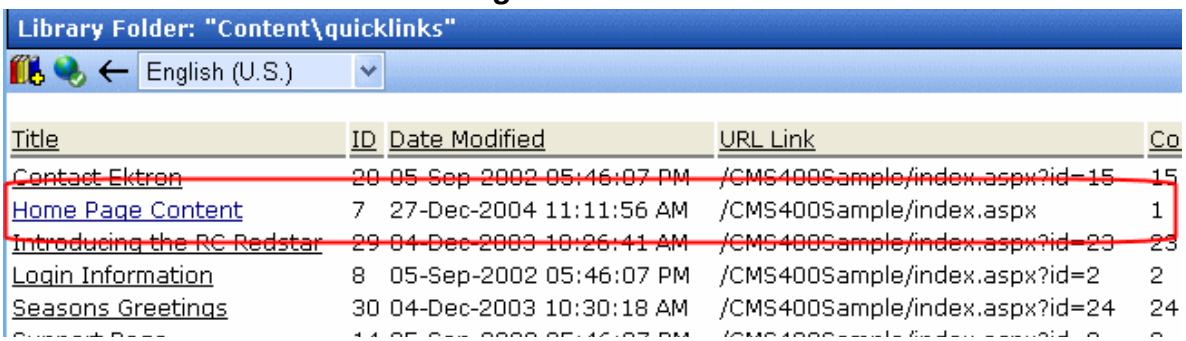
Manual Aliasing

Introduction

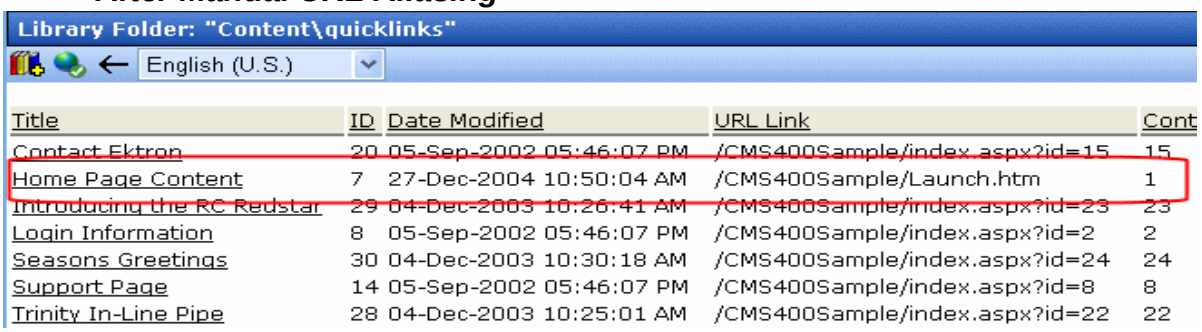
When using manual aliasing, you choose any content block then assign a different URL to it. From then on, the page can be identified either by its original URL (assigned automatically by **Ektron CMS400.NET**) or by the alias you give it.

When assigning an alias, choose the name you want users to see as your URL. In the example below, the page name changed from `/CMS400Example/index.aspx` to `/CMS400Example/Launch.htm`. Launch.htm is the alias.

Before Manual URL Aliasing



After Manual URL Aliasing



This section explains manual aliasing through the following subtopics.

- ”Benefits of Manual URL Aliasing” on page 419
- ”Enabling Manual Aliasing” on page 420
- ”Activating/Deactivating Manual Aliasing” on page 423
- ”Permissions for Manual Aliasing” on page 424
- ”Adding a Base Reference to a Template” on page 425
- ”Assigning a Manual URL Alias” on page 425
- ”Editing A Manual URL Alias” on page 428
- ”Removing a Manual URL Alias” on page 429

Benefits of Manual URL Aliasing

Manual URL Aliasing lets you completely alias a static or dynamic site. Benefits include

- You can make your site more user-friendly by creating “human readable” URLs (for example, `/ourcompany.html` is readable, while `company.aspx?id=1` is not.).
- If you have a PHP site, you can alias all php pages and use the same Query String names to pass the needed info to the new ASPX pages.

NOTE Any query strings appended to an aliased page pass to the ASPX page and may be used if necessary.

- If you have a static web site (for example, all HTML pages) that is indexed in a search engine, you can alias your whole site and gain complete content management without affecting your ranking in the search engine.
- You can increase your rankings in a search engine by naming pages according to the context of a specific search term.

Enabling Manual Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it.

NOTE Before editing your web.config file, you should close all open browsers. In some instances, you may need to do an IIS reset.

1. Open the web.config file, located in your Web site’s root folder.
2. Change the value of `ek_RedirectorInstalled` to **True**.

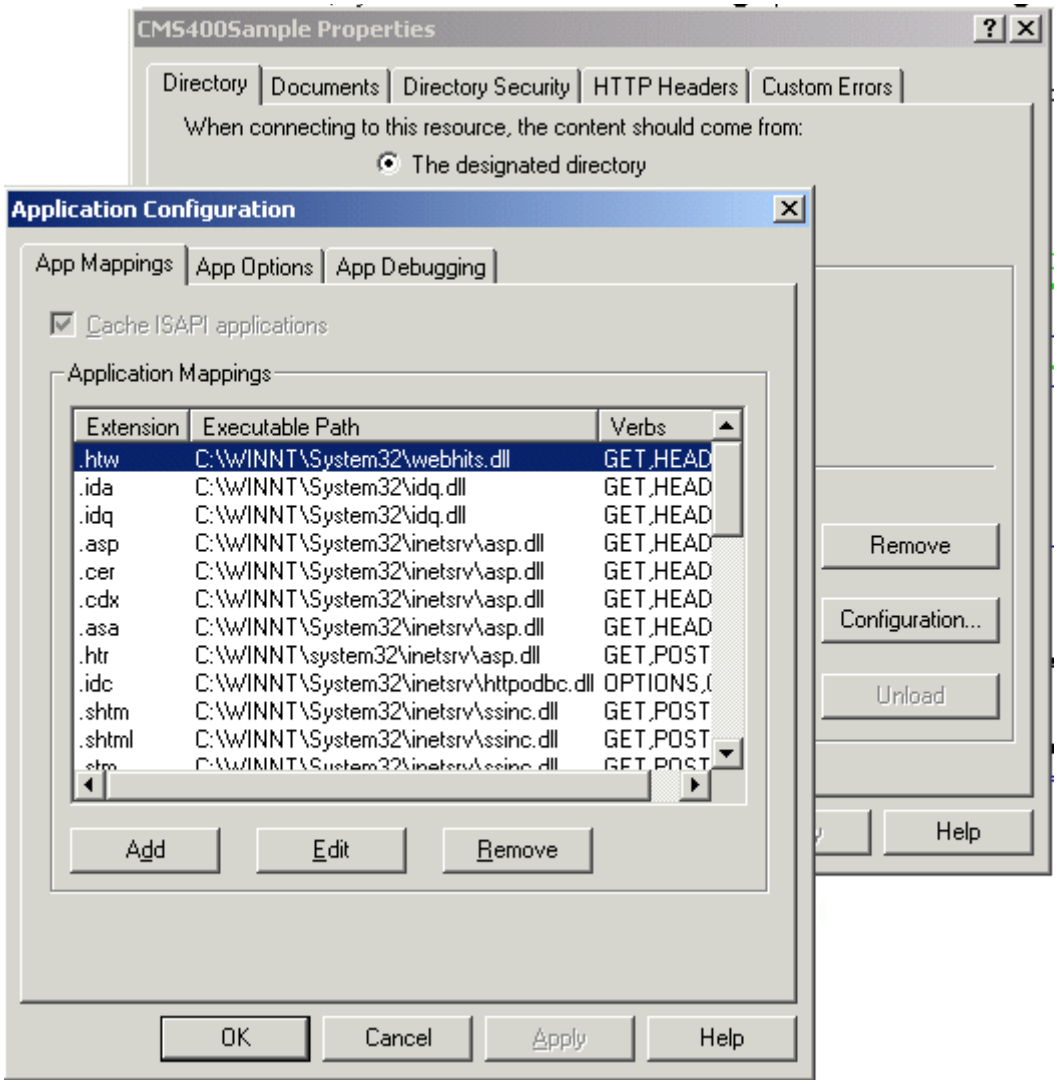
NOTE You only need to perform step 3 if you want add content blocks with an extension other than those already registered, such as .aspx. The **App Mappings** tab on the Application Configuration screen (illustrated below) indicates which extensions are registered on your server.

3. After `ek_RedirectorManualExt`, set a comma-delimited list of Web page extensions for which you will want to create aliased pages. For example, ".aspx,.htm,.html,”. By default .aspx is already in the list.

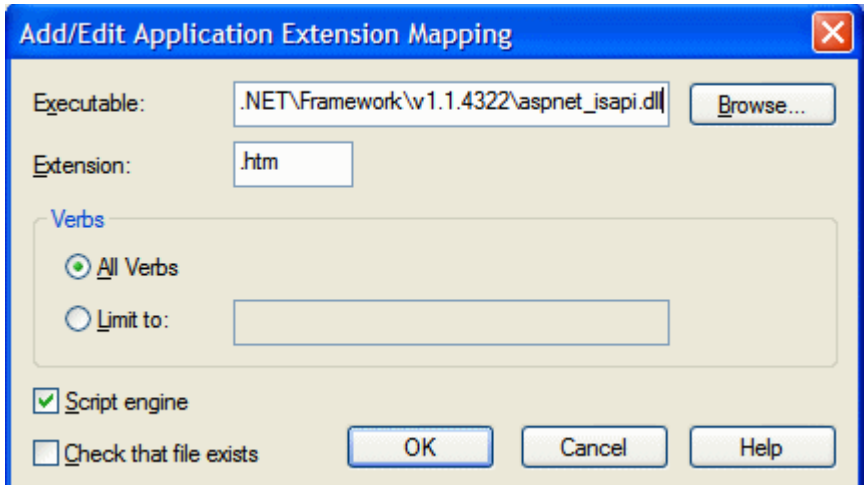
NOTE You can enter one or more extensions. Each extension must begin with a period, and the last extension must have a comma after it.

4. Save web.config.
5. Open IIS, go to the web site, and right-click **Properties**.

6. Click the **Directory** tab.
7. Click the **Configuration** button.
8. On the **App Mappings** tab, add each extension.



9. The Add/Edit Application Extension Mapping dialog appears.

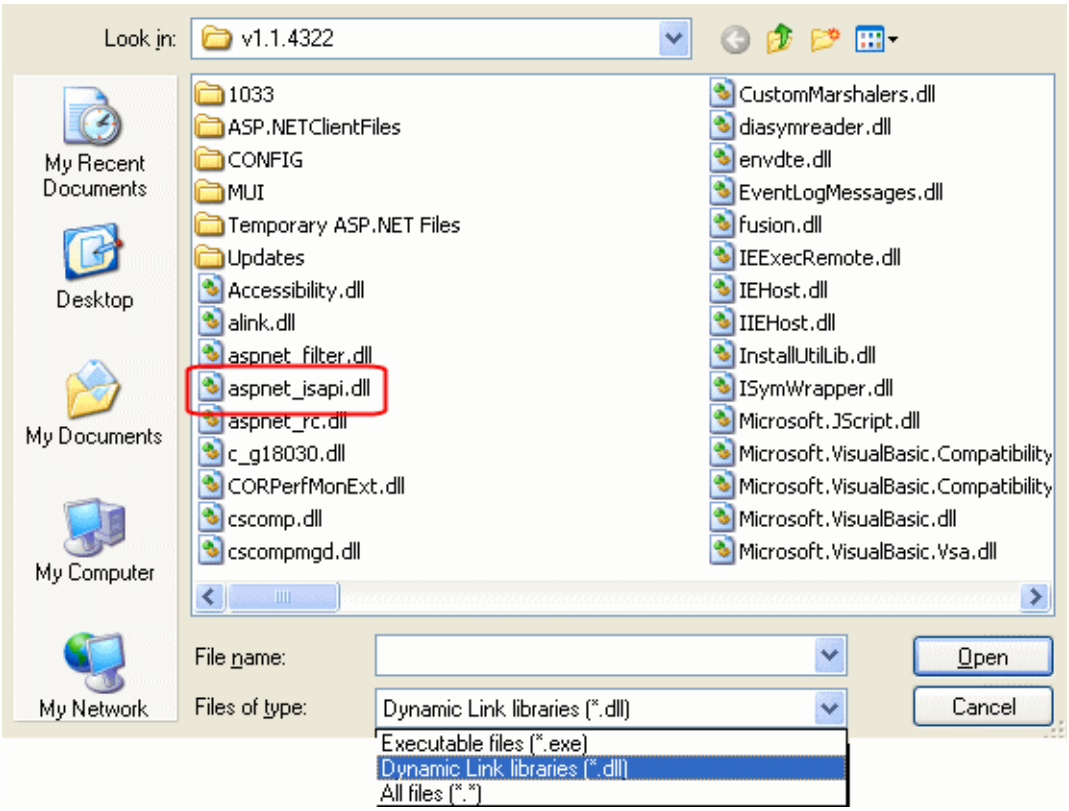


10. In the **Executable** field, add the .NET Framework aspnet_isapi.dll.

NOTE Use the latest version of the asp.net_isapi.dll. The default location is `c:\windows\Microsoft.NET\Framework\`***`latestversion`***`\aspnet_isapi.dll`. In the path, ***latestversion*** refers to the v1.1.4322 folder or the folder that contains the latest version.

WARNING! IIS can abbreviate the path in the **Executable** text box, causing the **OK** button to be grayed out. If the text box does not contain the full path, IIS cannot validate the path. To remedy this, click in the text box. The full path appears, and the **OK** button is now active.

.



NOTE When browsing to the aspnet_isapi.dll folder, you may need to change the file type to .dll or show all files. It is set to .exe by default.

11. In the **Extension** field, add the extension you would like to use. (for example, **.htm**).
12. Select **All Verbs**.
13. Uncheck **Check that file exists**.
14. Click **OK**.

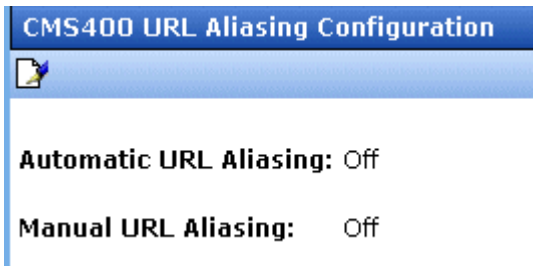
NOTE If the **OK** button is grayed out, click the cursor inside the **Executable** field to activate the **OK** button.

Activating/Deactivating Manual Aliasing

To activate the aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

NOTE If you do not see a **URL Aliasing** option under **Configuration**, see "Enabling Manual Aliasing" on page 420.

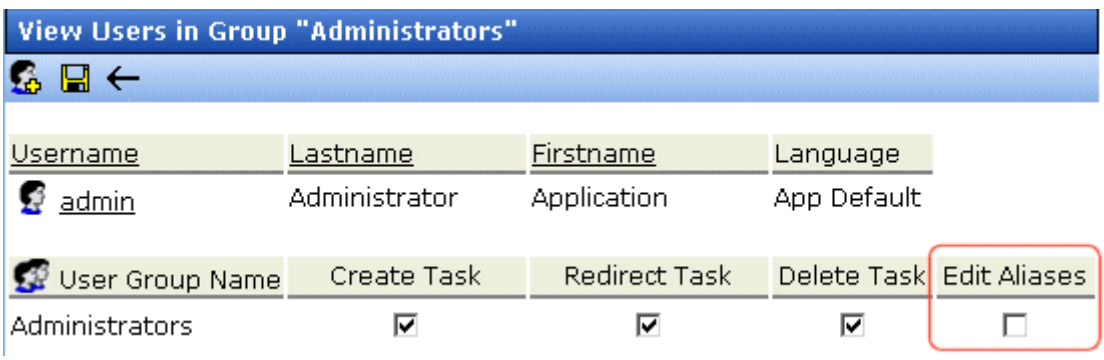
The screen indicates if Manual Aliasing is currently on or off. To change its state, click the Edit button (), check or uncheck the box, and click the Save button.



If Aliasing is turned on and you uncheck it, your page URLs return to their original format (see "Sample Quicklinks Folder with URL Aliasing Turned Off" on page 417).

Permissions for Manual Aliasing

To enable content editors to see the **Alias** tab in the Content folder, enable permissions for URL Aliasing on the View User Groups screen, circled below.



. For more information on setting permissions for user groups, see "Viewing the Users in a User Group" on page 128.

Adding a Base Reference to a Template

When aliasing a Web page, you must add a reference to the base URL into the <Head> section of the template. Otherwise, any relative links on the page use the alias as the base URL.

For example, you have the file winners.gif on a Web page. The page's URL is http://www.ekexample.com/baseball/team.aspx?id=37. The alias for this page is http://www.ekexample.com/2004/worldchamps.aspx. When the page tries to find winners.gif, it looks in the /2004/ directory. The page should look in the /baseball/ directory, because that is where the file is located.

Here is the syntax used in the <Head>.

```
<BASE HREF="baseURL"
TARGET="WindowName">
```

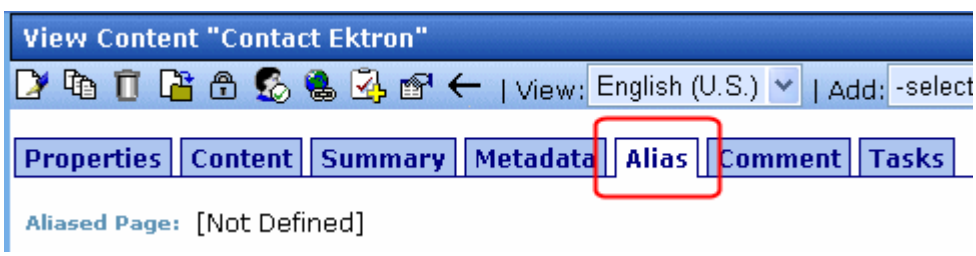
Here is an example:

```
<HEAD>

<BASE HREF="http://www.ekexample.com/baseball/">

<HEAD>
```

Assigning a Manual URL Alias

There are two ways to manually assign an alias.

- Use the Page Name Maintenance screen. This method is for administrators only.
- Use the Alias tab in View Content area of the content block. This method can be used by editors or administrators.



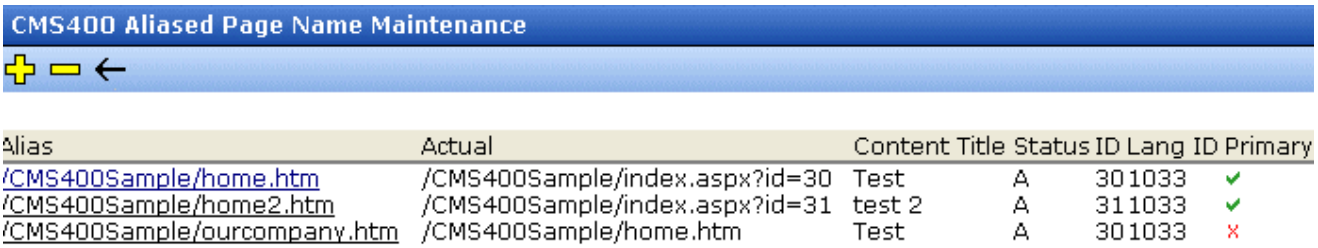
Each method is explained below.

Adding a Manual Alias via the Page Name Maintenance Screen

NOTE Make sure you have enabled URL Aliasing and given the administrator's group permissions for aliasing. For information on Enabling URL Aliasing, see "Benefits of Manual URL Aliasing" on page 419. For information on User Group Permissions, see "Viewing the Users in a User Group" on page 128

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button ( ).
3. The Page Name Maintenance screen appears.

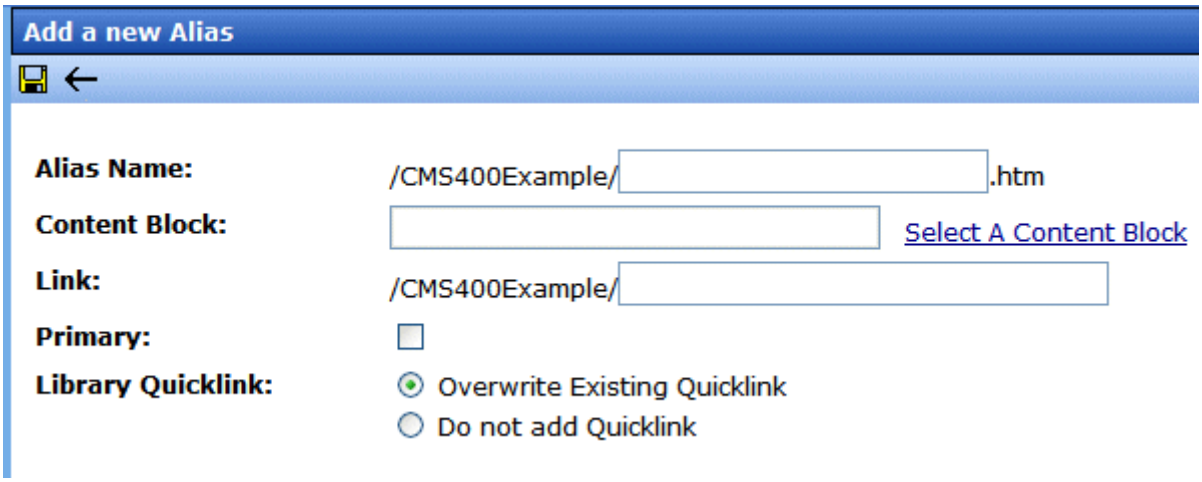
.



The following explains the columns on the screen.

Field	Description
Alias	The URL as it appears aliased.
Actual	The actual URL before aliasing.
Content Title	The title of the content block.
Status	The status of the content block. For more information on content block status, see "Content Block Status" on page 15
ID	The content block's ID number.
Lang ID	The language code for the content block.
Primary	The alias a content editor sees when editing an alias via the Alias tab. *See Also:* "Adding a Manual URL Alias via the Alias Tab" on page 427 ✔ = Primary Alias for that URL

4. Click the Add Alias button ( ). The Add a New Alias screen appears.



5. In the **Alias Name** field, choose the name you want to use for an alias.
6. Click on **Select a Content Block** to choose a content block.
7. The QuickLink Select window appears.
8. Choose a content block.
9. Check the **Primary** box if you want to make this the primary alias.
10. Choose a Quicklink option.

- **Overwrite Existing Quicklink** overwrites the existing Quicklink for the content block.

WARNING! When you choose to overwrite an existing Quicklink, you permanently delete it. There is no way to revert back to the old Quicklink. If you want to use the old Quicklink again, you need to add a new one. For more information on creating Quicklinks, see Ektron CMS400.NET User Manual > "Library Folder" >"Quicklinks"

- **Do not add Quicklink** does not create a Quicklink for this alias.

11. Click the Save button ( ).

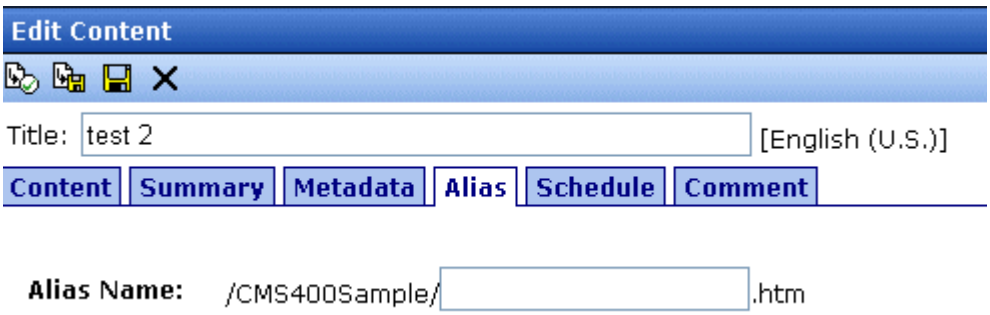
Adding a Manual URL Alias via the Alias Tab

NOTE Make sure you have enabled URL Aliasing and given the administrator's group permissions for aliasing. For information on Enabling URL Aliasing, see "Benefits of Manual URL Aliasing" on page 419. For information on User Group Permissions, see "Viewing the Users in a User Group" on page 128

On the Alias tab, **Alias Name** has the message, **[Not Defined]**. There are two reasons this message appears:

- No alias is defined
- An alias is defined in Page Name Maintenance, but it is not set to be a primary alias

1. In the Workarea, click the content block you want to work with.
2. Click the Edit button ( ).The Edit Content screen appears.



3. Click the **Alias** tab.
4. In the **Alias Name** field, enter the name you want to use for an alias.
5. Save and publish the content block.

NOTE An alias goes live only after the content block is published.

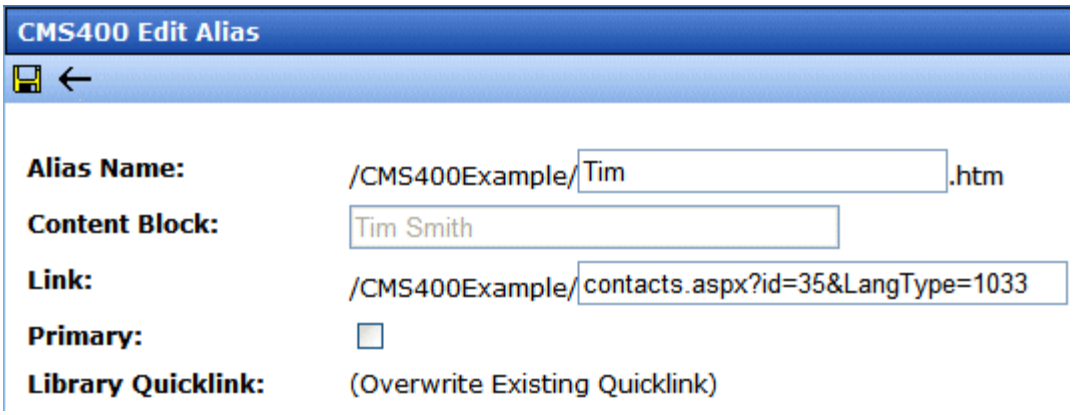
Editing A Manual URL Alias

You can edit an alias by going to the Page Name Maintenance screen. This lets you change the alias name and quicklink properties. You can also change the primary alias if you have more than one as for a content block.

To edit a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.

2. Click the Page Name Maintenance button ( ).
3. On Page Name Maintenance screen, click the link you want to edit.
4. The Edit Alias screen appears.



NOTE When you edit an Alias, the only things you can change are Alias Name and Primary.

5. Make any changes. To learn about the fields, see "Adding a Manual Alias via the Page Name Maintenance Screen" on page 426.
6. Click the Save button ( ).

Removing a Manual URL Alias

To remove a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button ( ).
3. On Page Name Maintenance screen, click the **Remove button ( )**.
4. Check the boxes of the aliases you would like to remove.
5. Click the Delete button ( ).
6. Click **OK** on the dialog box to confirm.

E-Mail Features

Configuring SMTP Server

For information about configuring Microsoft's SMTP service for your Ektron CMS400.NET Web server, please refer to Configuring E-mail Notifications, in the Ektron CMS400.NET Setup Manual.

Automatic eMail Notification

Ektron CMS400.NET 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 123

The Tasks feature also has automatic email Notification. For more information, see "Email Notification" on page 279.

Content of Automatic email

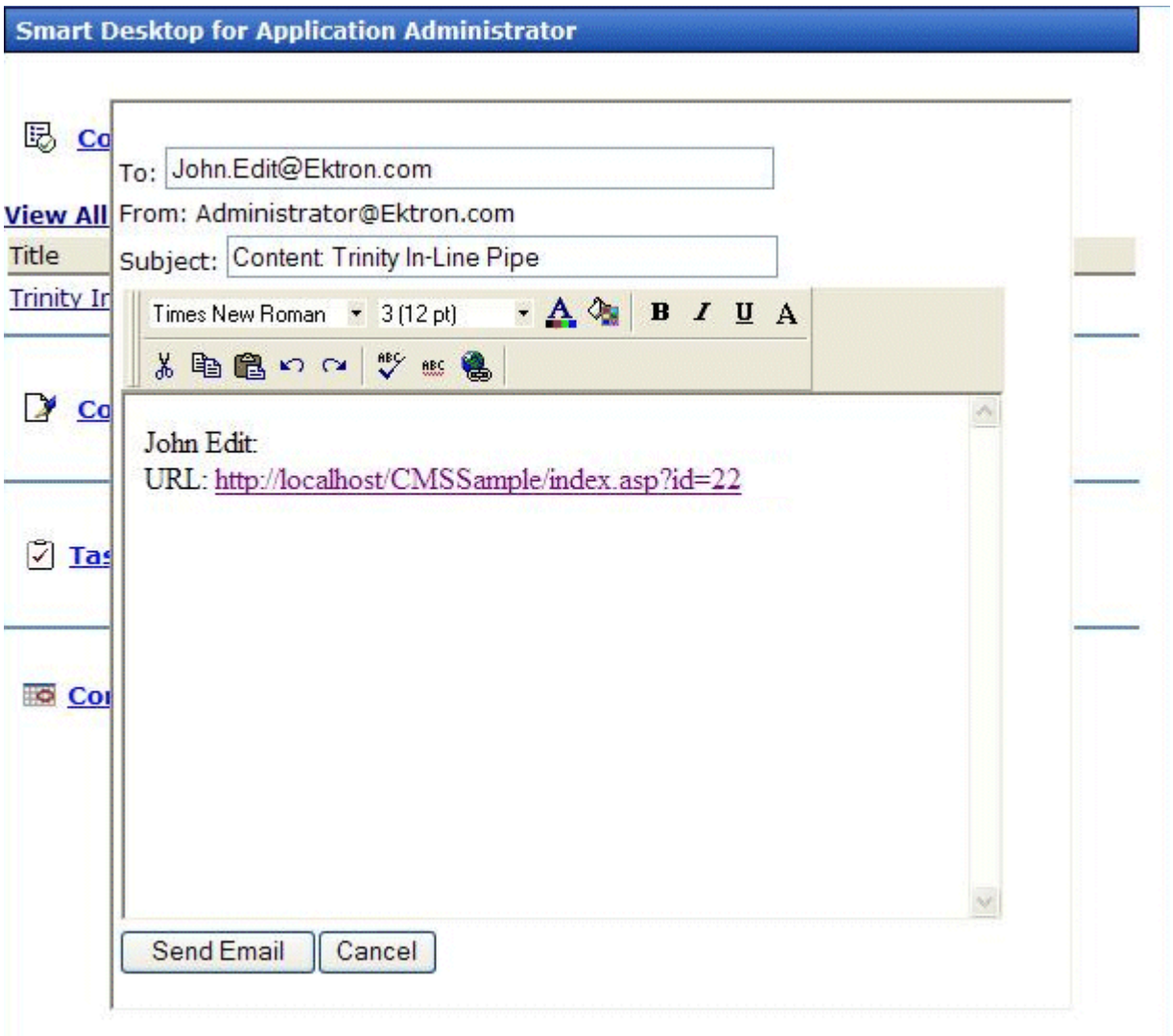
The automatic emails are stored in and received from the database. Each email consists of one string for the subject and one for the body. **Ektron CMS400.NET** does not currently support HTML emails, however the messages are fully customizable. To learn about customizing them, see Customizing **Ektron CMS400.NET** Emails in the **Ektron CMS400.NET** Setup Manual.

Instant eMail

In addition to automatic email, **Ektron CMS400.NET** 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)

When you click such a user/group name or email icon, the email screen appears, as shown below. Once you complete the screen and click **Send**, an email is sent to designated users.



The following sections explain how to set up and use Instant email.

Conditions for Instant eMail

- The user who is using **Ektron CMS400.NET** must have a valid from email address set up in the user profile. If not, email icons do not appear in **Ektron CMS400.NET**.
- The email software must be configured for your server. See "Configuring SMTP Server" on page 430

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 CMS400.NET** features support instant email.

- Smart Desktop
- Tasks
- Approvals
- Reports
- User and user group 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 CMS400.NET** into the email.

Field	Source of Default Information	Editable?
To	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. If you specify a group to receive the message, as long as one group member has a valid email address, all group members with valid addresses receive the email.	Yes. If desired, you can add recipients by typing them into this field.
From	User who signed on to **Ektron CMS400.NET**.	No

Field	Source of Default Information	Editable?
Subject	If the email message is linked to a content block, its title appears. The screen section below provides an example of a content block (**Trinity In-Line Pipe**) that is linked to a message.	Yes
Body of message	If the email message is linked to content block, a link to the content block appears.	Yes

Searching Content on the Web Site

NOTE This section explains how to use the search function on a browser page. For information about inserting the search function into an Ektron CMS400.NET Web template, refer to the Ektron CMS400.NET Developer Manual.

NOTE 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 37.

NOTE This section explains how to search through XHTML content on your site. To learn about searching through XML content, see "XML Indexing" on page 165.

Ektron CMS400.NET has a search function that can be easily integrated into any Ektron CMS400.NET template. The search command looks through your XHTML Web site content, then displays links to the content found by the search.

IMPORTANT! Each content block includes a **Content Searchable** field. The search only considers content blocks if this field is checked.

When you insert the search function onto a template, it looks like this on the Web site.

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 the search preferences, you should understand the difference among them. The explanations below assume you entered these words into the search text field.

- partners
- content
- Monday
- employee
- green

All the Words

All the Words works like an “and” function. The search returns only content blocks that have the words partners *and* content *and* Monday *and* employee *and* green.

Any of the Words

Any of the Words is almost the opposite of All of the Words. It works like an “or” function.

When you select this option, the search returns all content blocks that have *at least one* of the words entered in the search text field. In other words, it returns content blocks with the word partners *or* content *or* Monday *or* employee *or* green.

Exact Phrase

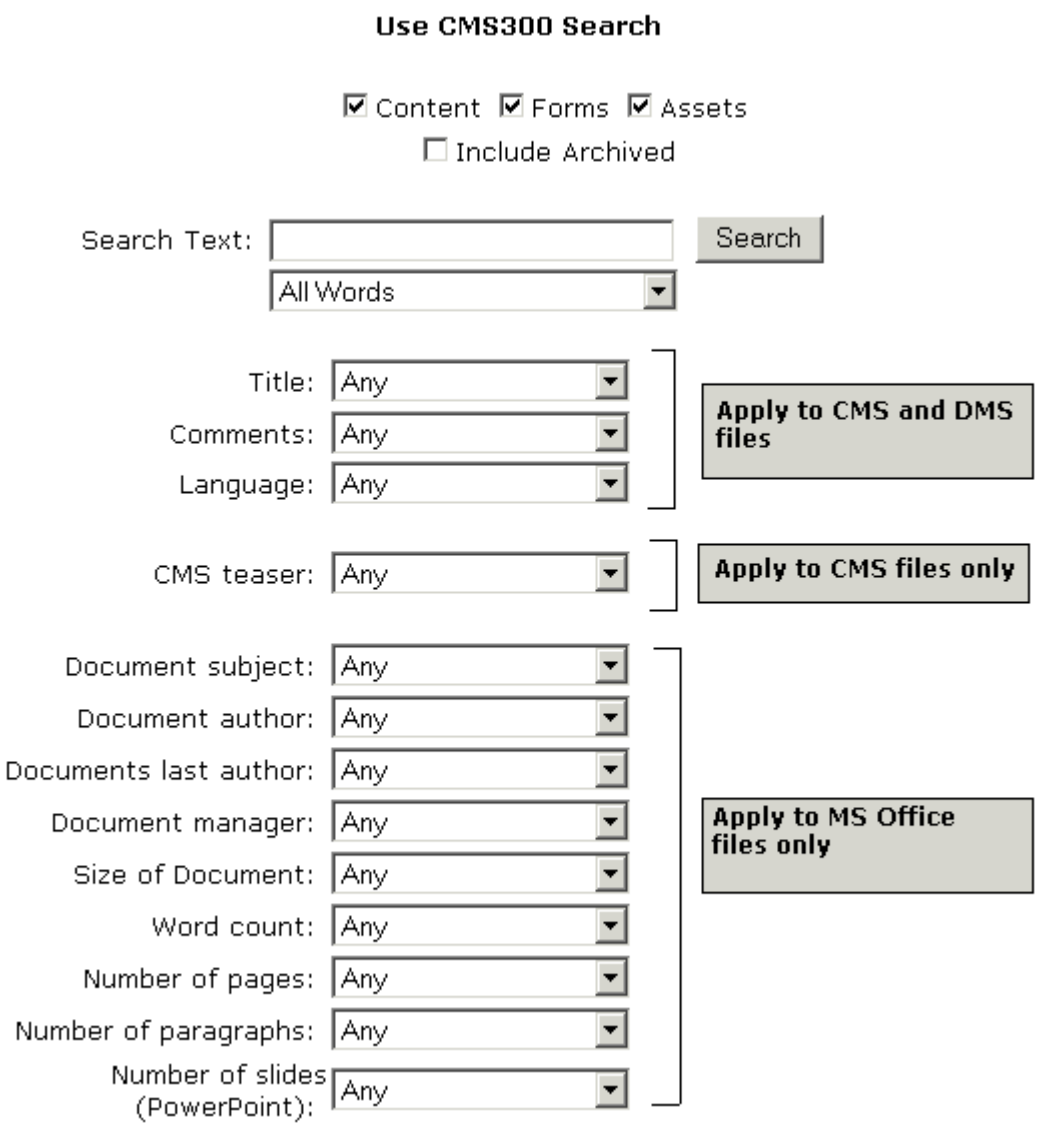
Exact Phrase returns content blocks that have all five words in the order specified in the search text field.

A better example would be to search for a phrase, such as Content Management Solution. The search yields only content blocks with that 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. The

search returns all content blocks with the letters “at” . This search finds words such as **At**, B**at**, Ch**at**ter, **At**oll, **AT**M, etc.



Advanced Search

The advanced search screen prompts you to specify

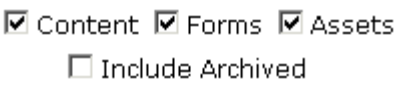
- the kind of content you want to search (for example, HTML content blocks)
- a search word or words
- how the search words must match the content in order for an asset to be found by the search
- *metadata* values to use as search criteria. The search only returns content that meets your criteria.

NOTE *Metadata* refers to information about a content block or file. For example, its language or title.

Each feature is explained below.

Specifying the Kind of Content to Search

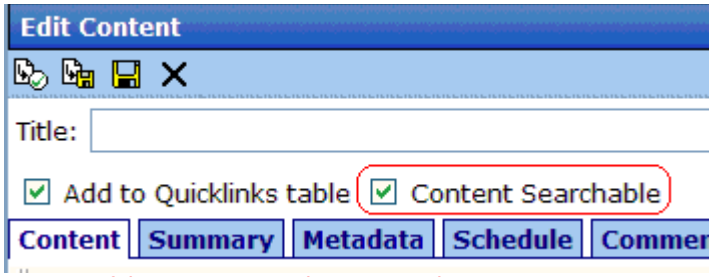
Near the top of the screen, four check boxes let you determine the kinds of content to search.



Check this box	To search
Content	HTML content blocks
Forms	HTML forms
Assets	Assets (Office documents and managed files)
Include Archived	Any of the above file types that have been archived. *See Also:* "Setting Archive Options" on page 53

IMPORTANT! The search only considers content whose **Content Searchable** box is checked. The **Content Searchable** box appears on the Edit Content screen above the

editor.



Also, the status of the content must be Approved.

Specifying the Search Word or Phrase

In the **Search Text** field, enter the word or words that you want to find the within selected the file types. The search uses these words to find and return content.

For HTML or form content blocks, entering one or more words here is optional. That is, you can use fields on the lower portion of the screen to find content without knowing any words in the content. For example, you can find every HTML content block in a selected language.

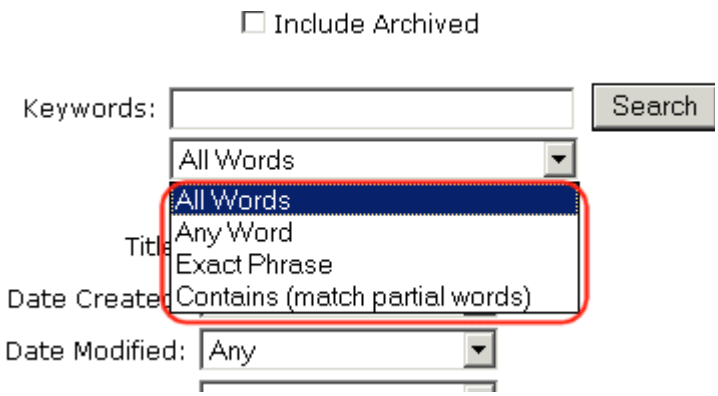
However, for assets you must enter some search text.

IMPORTANT! The search only finds assets if you enter some text into the **Search Text** field.

Specifying Match Criteria

NOTE This field is only applicable if you entered one or more words in the text field.

From this dropdown list, select criteria for how the search word or words must appear within the content of the files being searched.

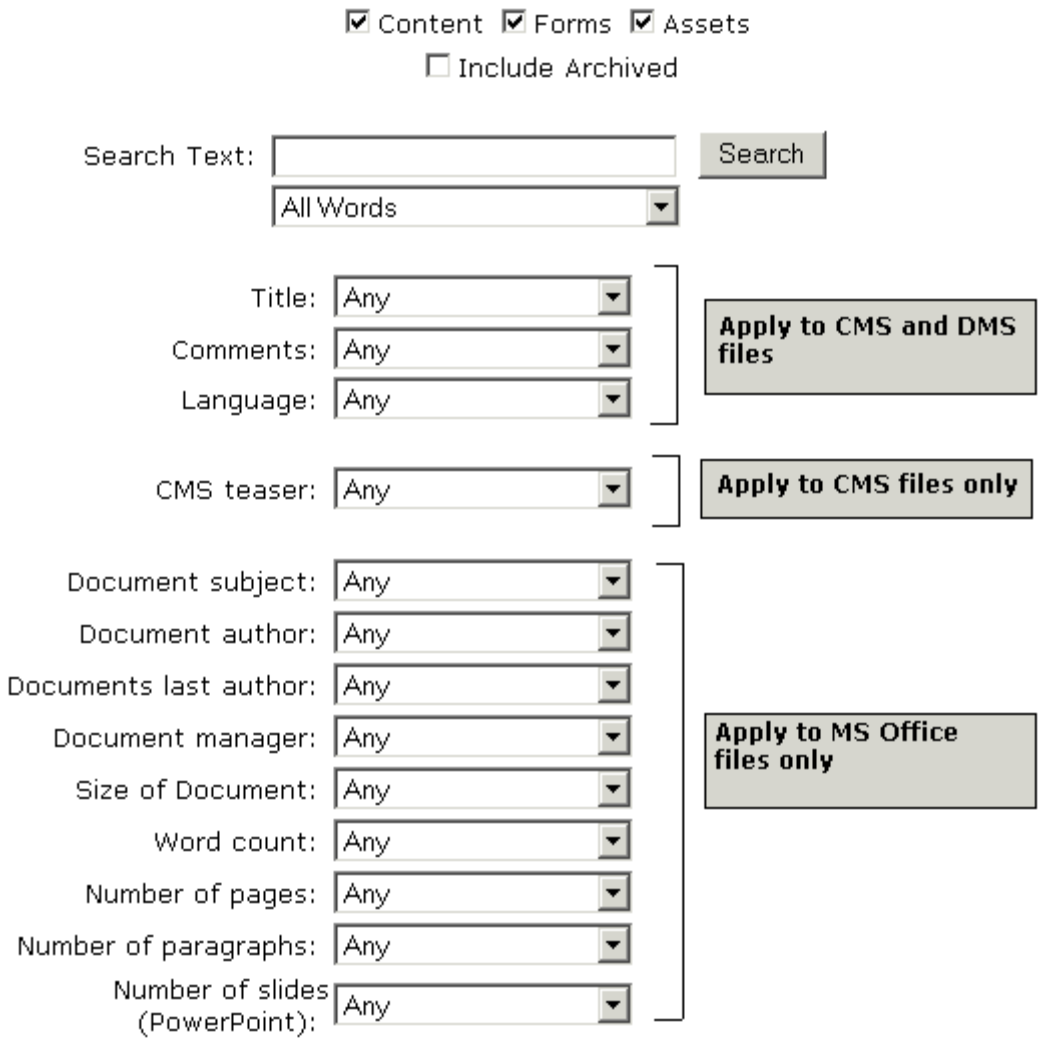


For more information, see "Search Options" on page 437.

Metadata Information Search

The next section of the search screen lets you enter search criteria about the metadata of the files being searched. Metadata refers to information about a content block or file. As examples, its title and language.

The kinds of metadata that can be searched are illustrated below.



As you can see, the top five fields apply to all file types. The next only applies to CMS content or form blocks, and the last nine only apply to Microsoft Office files.

Fields that Apply to CMS and Office Assets

Search criterion	Description
Title	In CMS, the content block or form title. In AMS, the Title field in the file's Properties window.
Comments	In CMS, the content block or form's comments, which can be inserted via the **Comment** tab. In AMS, comments are inserted in the file's Properties window's **Summary** tab.
Language	Each file in CMS and AMS is assigned a language property when it is created or imported. Note: This field determines the language of the content being searched. The language dropdown list, which appears on every standard template supplied by Ektron, has no effect on which content is searched

Field that Applies to CMS Files Only

Search criterion	Description
CMS teaser	The content block summary. *See Also:* "Adding a Content Block Summary" on page 56

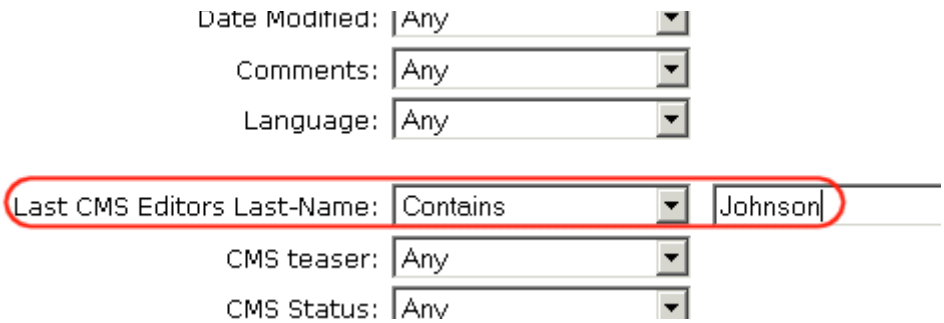
Fields that Apply to MS Office Files Only

Search criterion	Description
Document subject	As inserted into the **Subject** field on the File Properties window's **Summary** tab.

Search criterion	Description
Document author	As inserted into the **Author** field on the File Properties window's **Summary** tab.
Documents last author	As displayed on the read-only **Last saved by** field on the the File Properties window's **Statistics** tab.
Document manager	As inserted into the **Manager** field on the File Properties window's **Summary** tab.
Size of Document	As displayed on the read-only **Size** field on the File Properties window's **General** tab.
Word count	As displayed on the read-only **Statistics: Words** field on the File Properties window's **Statistics** tab.
Number of pages	As displayed on the read-only **Statistics: Pages** field on the File Properties window's **Statistics** tab.
Number of paragraphs	As displayed on the read-only **Statistics: Paragraphs** field on the File Properties window's **Statistics** tab.
Number of slides (PowerPoint)	As displayed on the read-only **Statistics: Slides** field on PowerPoint's File Properties window's **Statistics** tab.

Tips on Responding to Search Criteria Fields

- If the search field is a text field, you specify **contains** or **not contains**. Then, a text field appears to the right.



Here, enter the search text for that field. For example, if the field is **Last CMS Editors Last-Name**, and you insert **Johnson** into the text field, the search finds all files authored by anyone whose last name is **Johnson**.

- If the search field is a date field, the dropdown list lets you choose **Before**, **Between**, or **After**.
  - Use **Before** to select all dates *prior to* a specified date
  - Use **After** to select all dates *later than* a specified date
  - Use **Between** to select dates by specifying a beginning and end date. All dates in between are considered.
- If the search field is numeric, the dropdown list lets you choose **Less Than**, **More Than**, **Equal To**, or **Between**.

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 CMS400.NET. 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 CMS400.NET.

The Active Directory feature has two implementation modes, described in the following table. Choose the mode that best meets your needs.

Mode	Information Shared between AD and CMS	How to Implement	For more information, see
user authentication only	• user logon name • domain • password	On the Active Directory Setup screen, check **Enable Active Directory authentication**.	”User Authentication Only Mode” on page 479
active directory integration	• user logon name • domain • password • user’s first and last name • email address • user groups • user’s group memberships	On the Active Directory Setup screen, check **Enable Active Directory authentication** and **Enable Active Directory integration**. You may also want to check **Enable automatic addition of user from AD** and **Enable automatic addition of user to groups**.	”Active Directory Integration” on page 447

WARNING! To successfully operate Ektron CMS400.NET 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. The domain user must have query permission into Active Directory so he can retrieve that information.

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.NET server. See SSL Support in the **Ektron CMS400.NET** Setup Manual for more information.

Active Directory Integration

This chapter covers the following topics:

- ”How Information is Transferred from AD to Ektron CMS400.NET” on page 447
- ”Which Information is Transferred from AD to Ektron CMS400.NET” on page 448
- ”Logging into a System that Uses AD Integration” on page 450
- ”Associating User Information in AD with Ektron CMS400.NET” on page 450
- ”User Groups” on page 454
- ”The Screens of the Active Directory Feature” on page 461
- ”Setup Guidelines” on page 475
- ”Disabling AD Integration” on page 477

How Information is Transferred from AD to Ektron CMS400.NET

Ektron CMS400.NET 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 CMS400.NET.

- Once you enable AD integration, all changes to user and user group information must be made in the AD -- the Ektron CMS400.NET Edit User and User Group screens change to primarily view screens.
- When adding a new user or user group toEktron CMS400.NET, 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 CMS400.NET.

Which Information is Transferred from AD to Ektron CMS400.NET

Ektron CMS400.NET accesses the following AD user information.

- Authentication (password, user logon name, and domain) for signing in to Ektron CMS400.NET.

  The password is not stored in Ektron CMS400.NET – the application only refers to the password during sign in.

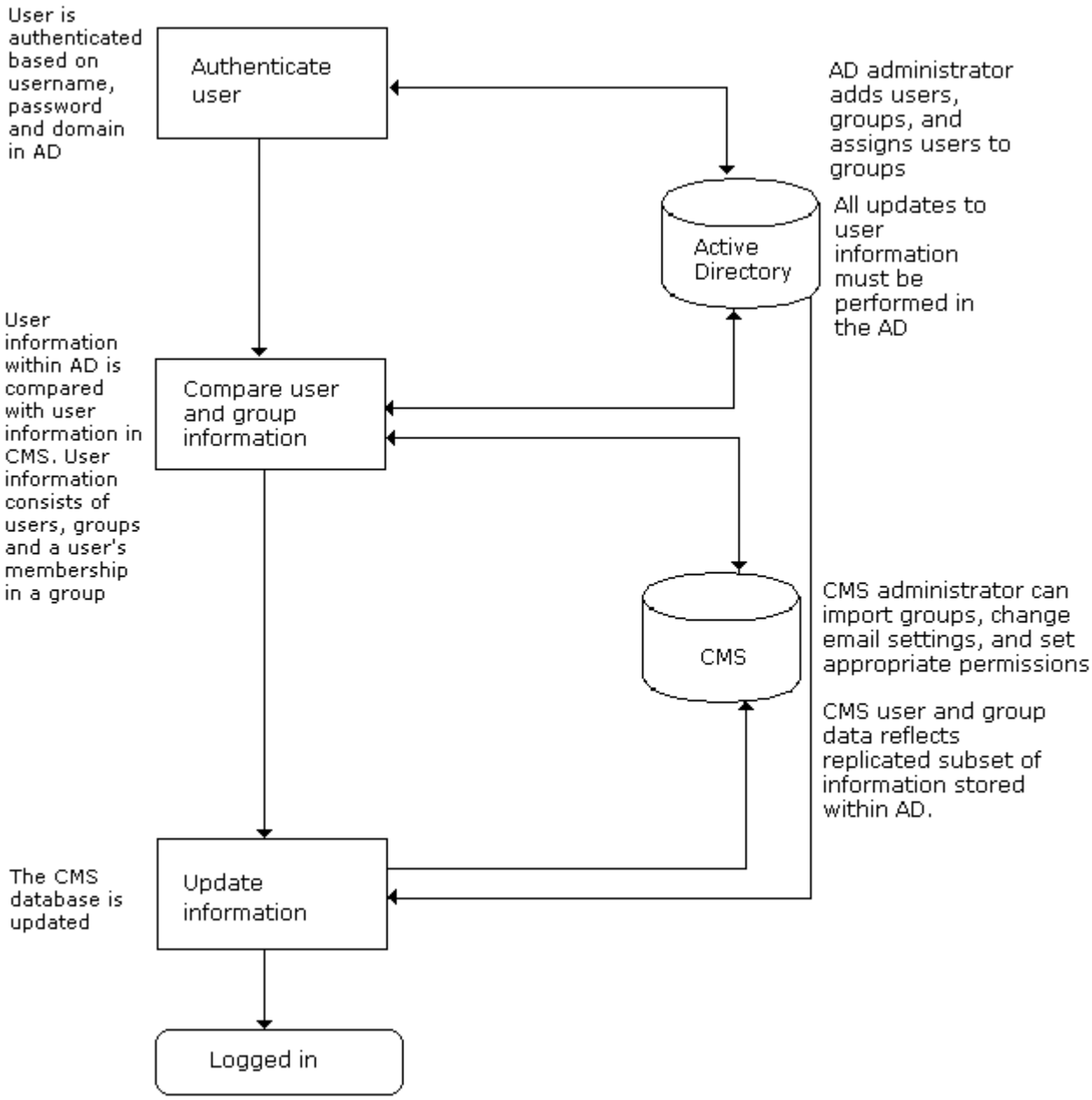
- User information, listed in the following table

Field in AD	AD attribute	Corresponding field in Ektron CMS400.NET
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 CMS400.NET
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.



Overview of Active Directory Integration

A key component of this feature is keeping information in the AD consistent with Ektron CMS400.NET. The next sections explain

- logging into a system that uses Active Directory integration
- associating user information in AD with Ektron CMS400.NET
- how user group information is maintained between systems
- the screens of the Active Directory Feature

Logging into a System that Uses AD Integration

Because usernames and passwords are stored in the AD by domain, the AD sign-in procedure requires you to select a domain name. So, if AD integration is enabled, the sign-in screen includes a pull-down list that the user clicks to select a domain.

NOTE Your organization determines AD domain names.

For more information about logging in, see "Logging Into an Ektron CMS400.NET Web Site" on page 7.

Associating User Information in AD with Ektron CMS400.NET

A key component of the Active Directory Integration feature is to maintain consistent information between the AD and Ektron CMS400.NET systems. This section explains how user information

is transmitted between AD and Ektron CMS400.NET when integration is first enabled and on an ongoing basis.

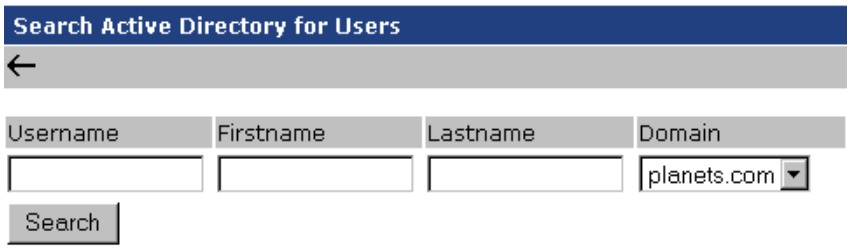
This section covers the following topics.

- Adding user information from AD to Ektron CMS400.NET
- Associating user information when integration is first enabled
- Associating user information after integration is enabled
- Editing user information in Ektron CMS400.NET
- Deleting Users
- Replacing a User

Adding User Information from AD to Ektron CMS400.NET

Before using the AD integration feature, you should add all AD users that you will use in your Web site into Ektron CMS400.NET. To copy an AD user into Ektron CMS400.NET, 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.



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 CMS400.NET.

8. Click the Save button ( ) to add AD users to Ektron CMS400.NET.

   The View Users in Group Everyone screen appears, displaying the new user and the other Ektron CMS400.NET users.

When Integration is First Enabled

Ektron CMS400.NET 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 CMS400.NET when that user logs in or when the user is added to Ektron CMS400.NET.

See Also: ”The Active Directory Setup Screen” on page 461

The first time the user information is copied, the AD information overwrites all Ektron CMS400.NET information. To learn how information is updated from then on, see ”After Integration is Enabled” on page 453.

If two or more AD users have the same Ektron CMS400.NET 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 CMS400.NET, 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 CMS400.NET Users to Active Directory Users screen and associate an AD user with the Ektron CMS400.NET user.

See Also: ”Associating Ektron CMS400.NET Users with Active Directory Users” on page 467

Ektron CMS400.NET 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 CMS400.NET. When you add a user, the user information is copied from the AD to Ektron CMS400.NET.

See Also: ”The Search Active Directory for Users Screen” on page 471

NOTE You can only select AD users that do not already exist in Ektron CMS400.NET. 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 CMS400.NET whenever either of these events occurs:

- the user logs in.
- someone clicks the Refresh button ( ) on the user’s View User Information screen.

See Also: ”The View User Information Screen” on page 470

If a user’s last name, first name, email field, or group membership changed in the AD, those changes are copied to Ektron CMS400.NET. However, if a user’s *logon name* changed in the AD, that change is not copied to Ektron CMS400.NET because Ektron CMS400.NET 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 CMS400.NET Users to Active Directory Users screen, where you can update the AD user who is associated with the Ektron CMS400.NET user.

See Also: ”Associating Ektron CMS400.NET Users with Active Directory Users” on page 467

Editing User Information in Ektron CMS400.NET

Because **Ektron CMS400.NET** does not write to the AD, you can only change the **User Language** and **Disable E-Mail Notifications** fields within the Ektron CMS400.NET Edit User screen. You must edit all other user fields from the AD.

Deleting Users

If a user is deleted in AD, Ektron CMS400.NET does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

The user remains in Ektron CMS400.NET, and the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should delete the user from Ektron CMS400.NET using the Delete User function.

See Also: "Deleting A User" on page 126

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 26.

Replacing a User

If you associate the wrong AD user with a Ektron CMS400.NET user, you can replace the user. If you do so, all Ektron CMS400.NET privileges and workflow responsibilities assigned to the old user are transferred to the new one.

Follow these steps to associate a Ektron CMS400.NET user with a new AD user.

1. From the left side of the Workarea, click **Users**.
2. Click the user that you want to replace.
3. Click the Associate CMS User with Different AD User button ( ).
4. Select a user to replace the user you selected in Step 2.
5. Click the Save button ( ) to finalize the change.

When you complete this procedure, the first user is deleted from Ektron CMS400.NET.

User Groups

This section explains how a user's group membership is copied from the AD to the Ektron CMS400.NET system when integration

is first enabled, and then on an ongoing basis. Once assigned to a group, the user automatically receives all Ektron CMS400.NET privileges and workflow responsibilities associated with it.

NOTE The Active Directory has two kinds of user groups: security and distribution. Ektron CMS400.NET does not distinguish between them – as long as a user is a member of either kind of group, group information is imported to Ektron CMS400.NET.

This section explains the following topics.

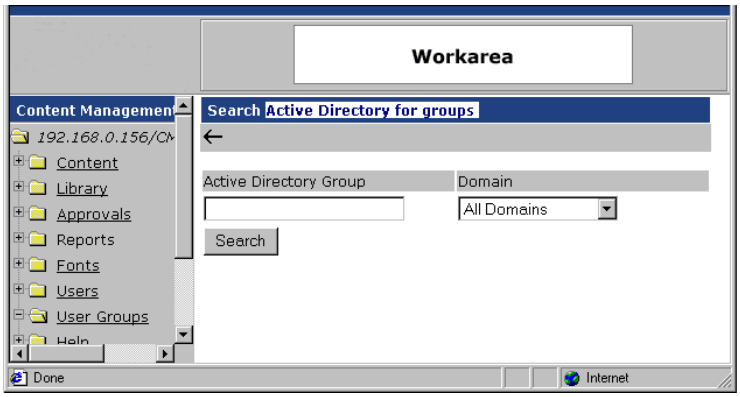
- Copying user group information from AD to Ektron CMS400.NET
- Associating a user's AD group information with Ektron CMS400.NET
- Mapping the administrator group
- User belongs to AD group that does not exist in Ektron CMS400.NET
- User belongs to Ektron CMS400.NET group that does not exist in AD
- 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 CMS400.NET

Before using the AD integration feature, you should copy all AD groups that you will use in your Web site into Ektron CMS400.NET. To copy an AD group into Ektron CMS400.NET, follow these steps.

1. From the left side of the Workarea, Click the **User Groups** folder.
2. Click the Add Groups button ( ).

The Search Active Directory for Groups screen appears.



3. From the **Domain** pull-down list, select the domain from which you want to add a user group.

NOTE The Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for groups within that domain.

4. Enter as much information as you know into the Active Directory Group field.
5. Click the **Search** button.
6. A new screen displays all groups that satisfy the search criteria.
7. Click the check box under the **Add** column to add users to Ektron CMS400.NET.
8. Click the Save button ( ).

Associating a User's AD Group Information with Ektron CMS400.NET

When Integration is First Enabled

Ektron CMS400.NET 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 CMS400.NET or when a user logs in or is added. At this time, any AD group memberships overwrite Ektron CMS400.NET group memberships *except* the Everyone group, to which all users belong.

NOTE The Everyone group, unlike other Ektron CMS400.NET 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 CMS400.NET, nothing happens because the feature assumes that all AD groups are not meaningful in Ektron CMS400.NET.

If a user belongs to an Ektron CMS400.NET 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 CMS400.NET.

See Also: "Associating User Group Membership with Active Directory User Group Membership" on page 468 and "Associating Groups with Active Directory Groups" on page 469

To learn how membership is updated from then on, see "After Integration is Enabled" on page 457.

Ektron CMS400.NET is Being Installed, so No User Groups Exist

Follow the procedure described in "Copying User Groups from AD to Ektron CMS400.NET" on page 455 to copy AD user groups to Ektron CMS400.NET. As users in those groups are added to Ektron CMS400.NET, their group membership is copied from AD to Ektron CMS400.NET.

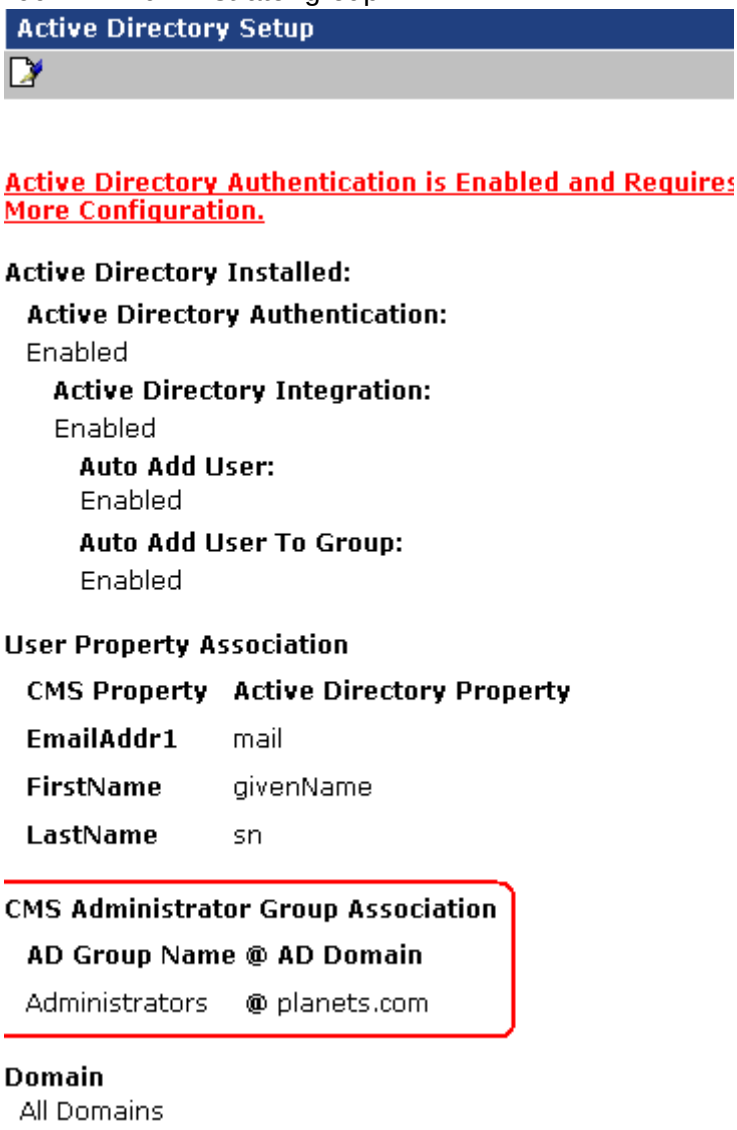
After Integration is Enabled

A user's group membership is updated in Ektron CMS400.NET 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 CMS400.NET or his group membership changes in the Active Directory
- The user logs in or someone clicks on the Refresh button ( ) on the user's View User Information screen

Mapping the Administrator Group

On the Ektron CMS400.NET Active Directory Setup screen, you can identify an AD user group that maps to the Ektron CMS400.NET Administrator group.



Administrators have access to all functions documented in this manual. (Unlike other Ektron CMS400.NET 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 CMS400.NET 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 CMS400.NET Administrator group -- you cannot have an AD administrator group within each AD domain.

See Also: ”The Active Directory Setup Screen” on page 461

User Belongs to AD Group that Does Not Exist in Ektron CMS400.NET

If user is assigned to an AD user group that does not exist in Ektron CMS400.NET, nothing happens. The AD integration feature assumes that an Ektron CMS400.NET administrator only maintains user groups that are meaningful to Ektron CMS400.NET, and not all AD groups may be meaningful to Ektron CMS400.NET.

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 CMS400.NET.

User Belongs to Ektron CMS400.NET Group that Does Not Exist in AD

If a user was a member of a user group in Ektron CMS400.NET 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 CMS400.NET.

See Also: ”Associating Groups with Active Directory Groups” on page 469

Removing Users from a Group

If you delete a user from an AD group, the user is automatically removed from the associated Ektron CMS400.NET group the next time the user's information is updated (as explained in "After Integration is Enabled" on page 453).

Adding User Groups

Once AD integration is enabled, you can only add new user groups in the AD. In Ektron CMS400.NET, use the Search Active Directory for Groups screen to copy an AD user group to Ektron CMS400.NET. You can only add groups that do not already exist in Ektron CMS400.NET. This procedure is described in "Copying User Groups from AD to Ektron CMS400.NET" on page 455.

Adding a User to a Group

You cannot add a user to a user group within Ektron CMS400.NET -- 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 CMS400.NET 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 CMS400.NET Group with Different AD Group button ( ).
4. Select a group to replace the group you selected in Step 2.
5. Click the Save button ( ) to finalize the change.

Deleting a User Group

Deleting a User Group in AD

If you delete a user group in AD and users are assigned to the group within Ektron CMS400.NET, the group is not automatically deleted in Ektron CMS400.NET. However, any Ektron CMS400.NET users who were members of the group are no longer

members the next time their Ektron CMS400.NET information is updated. The discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

Deleting a User Group in Ektron CMS400.NET

If you delete a user group in Ektron CMS400.NET and users are assigned to that group within AD, nothing happens. This is because the AD Integration Feature assumes that, in Ektron CMS400.NET, the administrator only sets up user groups that are meaningful to Ektron CMS400.NET, and some AD groups are not meaningful to Ektron CMS400.NET.

The Screens of the Active Directory Feature

The Active Directory feature uses the following screens:

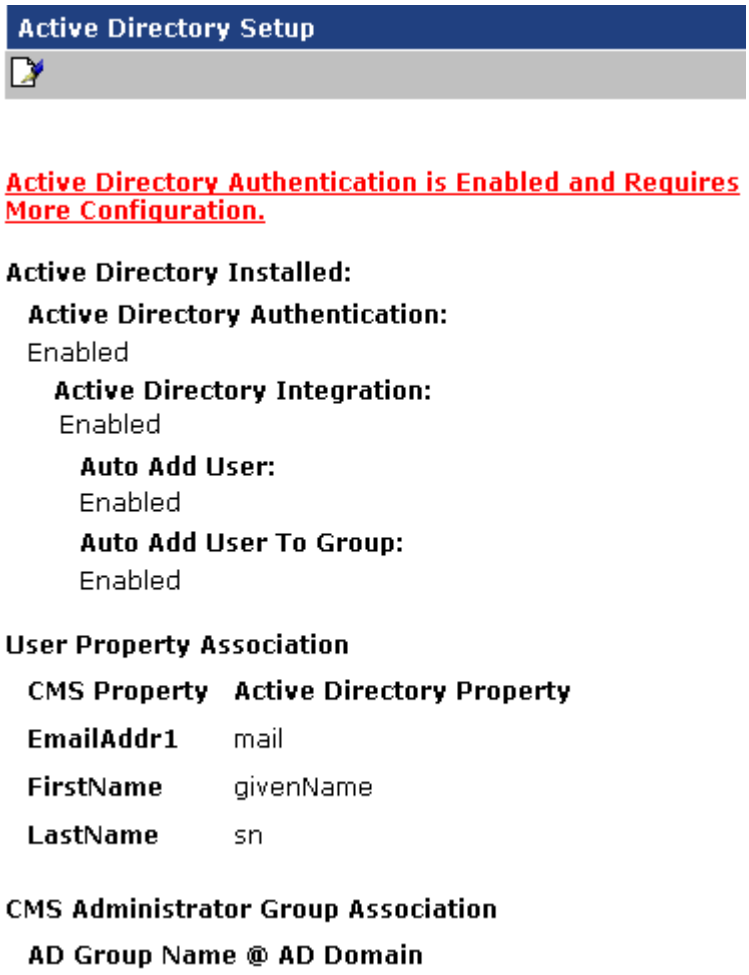
- the Active Directory Setup screen
- the Active Directory Status screen
- the View Users Screen
- the View User Groups Screen

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.

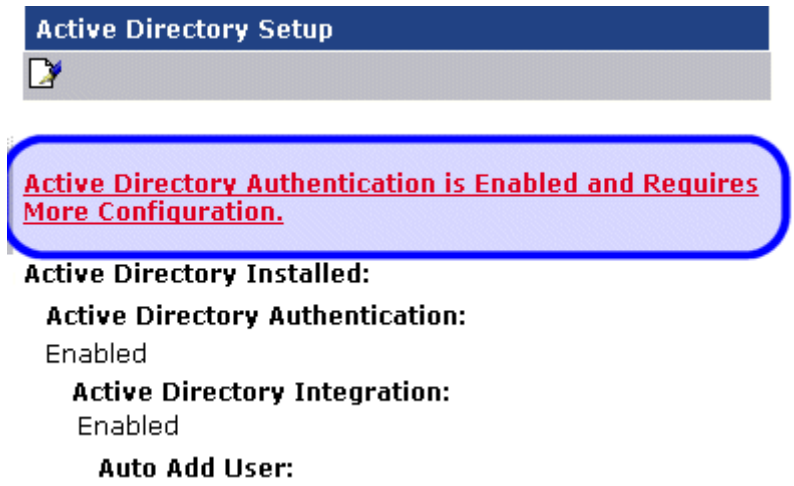
See Also: "Messages Near the Top of the Active Directory Setup Screen" on page 464

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 479

Field	Description	For more information, see
Active Directory Integration	If enabled, the Active Directory feature is functional. Can only be enabled if Active Directory Authentication is enabled.	"Active Directory Integration" on page 447
Auto Add User	If enabled, user information is copied from the AD to Ektron CMS400.NET when that user logs in or when the user is added to Ektron CMS400.NET. Can only be enabled if Active Directory Integration is enabled.	"Associating User Information in AD with Ektron CMS400.NET" on page 450
Auto Add User To Group	If enabled, a user's group membership is first copied from the AD when a user logs in or is added. Can only be enabled if Active Directory Integration is enabled.	"User Groups" on page 454
User Property Mapping		
FirstName	Enter the Active Directory Property that maps to the user's first name in Ektron CMS400.NET. 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 CMS400.NET. 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 CMS400.NET. By default, this is set to `mail`, but you can change it to any AD property.	same reference as FirstName (above)
Ektron CMS400.NET Administrator Group Mapping		

Field	Description	For more information, see
AD Group Name @ AD Domain	Enter the Active Directory user group and domain name that maps to the hard coded Ektron CMS400.NET administrator group. If you do not have an AD user group that includes all Ektron CMS400.NET administrators, you should create one and enter its name and domain here.	”Mapping the Administrator Group” on page 458
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 CMS400.NET user or group names include a domain (for example, admin@saturn.planets.com) that is excluded by your selection, those users/groups are flagged on the Active Directory Setup and Active Directory Status screens because the names now include an invalid domain.	

Messages Near the Top of the Active Directory Setup Screen



Message	Explanation
Active Directory Authentication is Enabled and Requires More Configuration.	Some Ektron CMS400.NET 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 CMS400.NET 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 CMS400.NET 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.

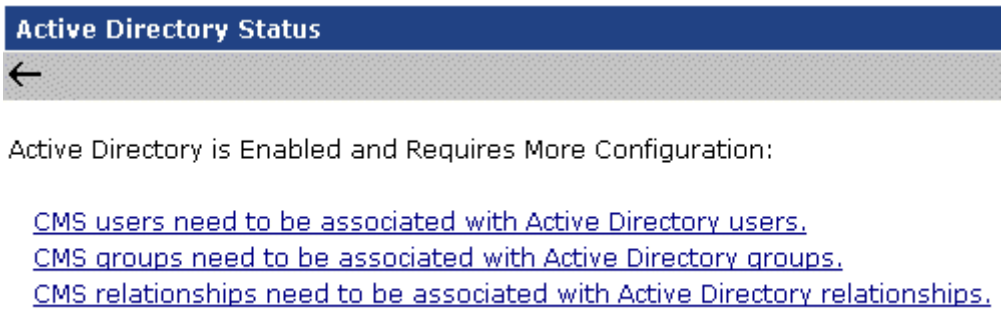
See Also: ”The Active Directory Status Screen” on page 466

The Active Directory Status Screen

Use the Active Directory Status screen to resolve the following discrepancies between Ektron CMS400.NET and AD.

- an Ektron CMS400.NET user needs to be associated with an AD user
- an Ektron CMS400.NET user group needs to be associated with an AD user group
- an Ektron CMS400.NET 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

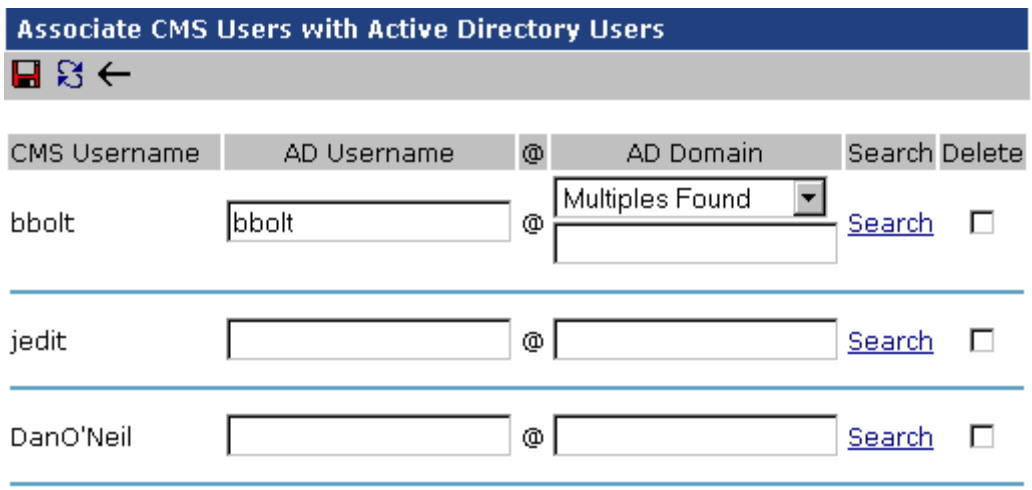
- an Ektron CMS400.NET user is not associated with an AD user, read "Associating User Information in AD with Ektron CMS400.NET" on page 450.
- an Ektron CMS400.NET user's group membership is not associated with the user's AD group membership, read "Associating a User's AD Group Information with Ektron CMS400.NET" on page 456
- an Ektron CMS400.NET group is not associated with an AD group, read "User Groups" on page 454

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 CMS400.NET Users with Active Directory Users
- Associating Ektron CMS400.NET User Group Membership with Active Directory User Group Membership
- Associating Ektron CMS400.NET Groups with Active Directory Groups

Associating Ektron CMS400.NET 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 CMS400.NET Users with Active Directory Users screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET users with AD users.



If a user with the same username exists in the AD, that name and domain appear by default in the **AD Username** and **AD Domain** fields. If the user exists in the more than one AD domain (as illustrated in the first example above), select a domain from the pull-down list.

If there is no default and you know the AD user name to associate with an Ektron CMS400.NET 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 CMS400.NET username, make the change in the AD. Then, click

the Refresh button ( ) to update Ektron CMS400.NET and resolve the discrepancy.

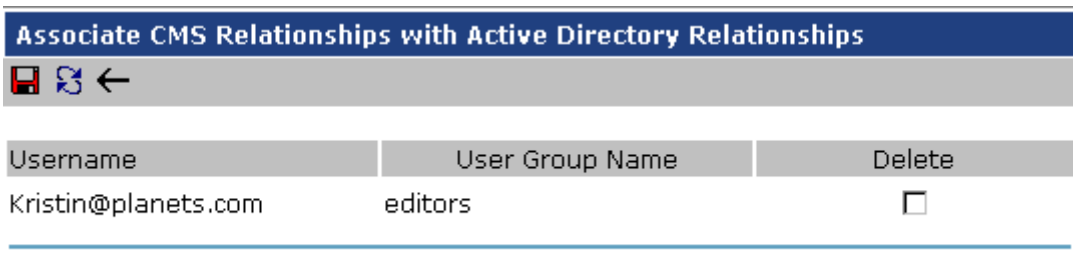
Finally, if this user should not exist in the Ektron CMS400.NET database, click the box under the **Delete** column to delete the user from Ektron CMS400.NET.

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 CMS400.NET Relationships with Active Directory Relationships screen appears (illustrated below). Use this screen to coordinate Ektron CMS400.NET user group membership with AD user group membership.

The screen displays a user's group membership that exists in Ektron CMS400.NET, but does not exist in the AD.



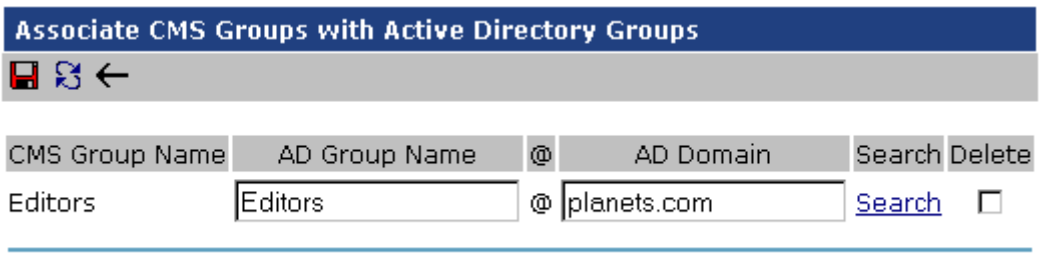
See Also: "Associating a User's AD Group Information with Ektron CMS400.NET" on page 456

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 ( ) to update the user group information in Ektron CMS400.NET.
- To remove the user's group membership in Ektron CMS400.NET, check the box under the **Delete** column and click the Save button ( ).

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 CMS400.NET User Groups with Active Directory Groups screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET groups with AD groups.



If a group with the same groupname exists in the AD, that name appears by default in the **AD Group Name** field. If the group exists in the more than one domain within the AD, select a domain from the pull-down list.

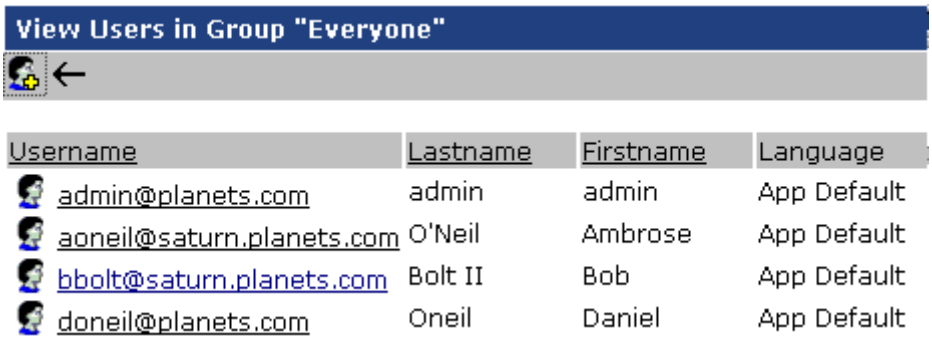
If there is no default and you know the AD group name to associate with an Ektron CMS400.NET group, enter that in the **AD Group Name** and **AD Domain** fields. If you do not know the AD groupname, click **Search** to find the group in the AD.

Finally, if this group should not exist in the Ektron CMS400.NET database, click the box under the **Delete** column to delete the group from Ektron CMS400.NET.

After you make all necessary changes, click the Save button ( ) to save them.

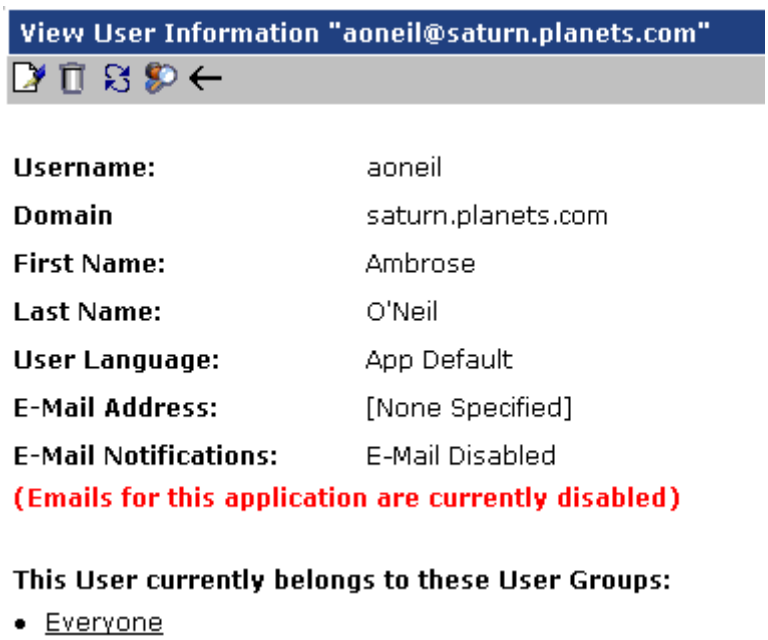
The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS400.NET database. To access the screen, click **Users** from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.



The View Users screen also provides a toolbar button ( ) that lets you add AD users to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Users Screen appears.

The View User Information Screen



The View User Information Screen displays the user's

- username and domain
- first and last name
- language
- email address and whether the user receives email notifications
- user groups

If you are using *user authentication mode*, **username** and **domain** can only be edited in the AD. You can edit all other fields on this screen.

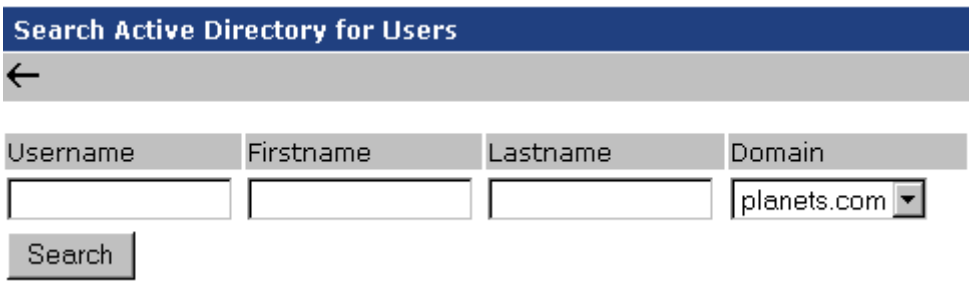
If you are using *full AD Integration mode*, you can only edit **language** and whether the user receives email notifications. You must edit the other fields in the AD.

The screen also displays the following buttons.

Button	Description
	Edit information on screen
	Delete user *See Also:* "Deleting Users" on page 454
	Retrieve latest information from AD into Ektron CMS400.NET *See Also:* "After Integration is Enabled" on page 453 This toolbar button does not appear if you are using user authentication mode.
	Replace user *See Also:* "Replacing a User" on page 454
	Return to previous screen

The Search Active Directory for Users Screen

Use this screen to add AD users to Ektron CMS400.NET. To access the screen, click **Users** from the left panel of the Workarea, then click the Add button ( ).



Enter as much search criteria as you know to reduce the number of users that the search yields. For example, if you know that the user's last name is Jackson and the user is in the planets domain, enter those criteria and you will get many fewer hits.

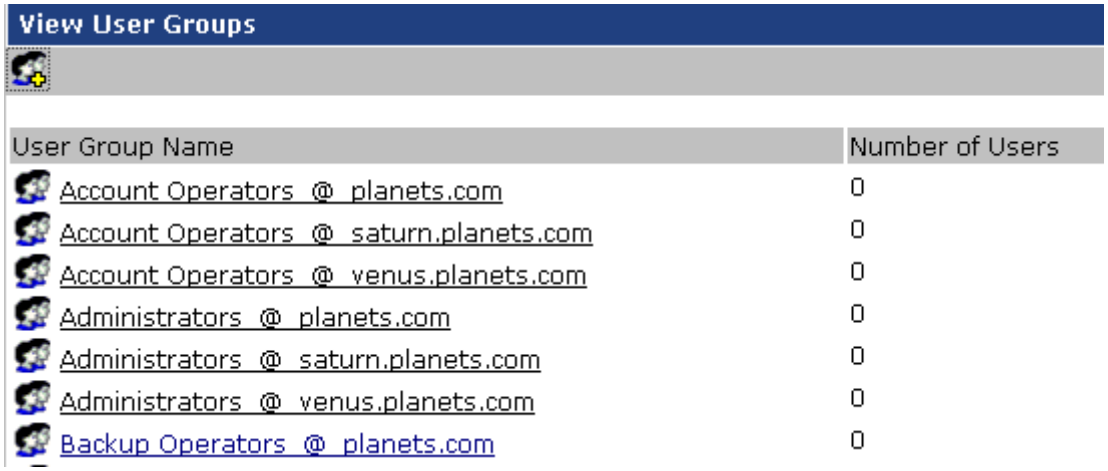
When the Active Directory Users screen appears, click the box next to users that you want to create in Ektron CMS400.NET.

Then, click the Save button ( ) to copy their information into Ektron CMS400.NET.

The View User Groups Screen

The View User Groups Screen displays all AD user groups that have been copied into Ektron CMS400.NET. (See "Copying User Groups from AD to Ektron CMS400.NET" on page 455).

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.

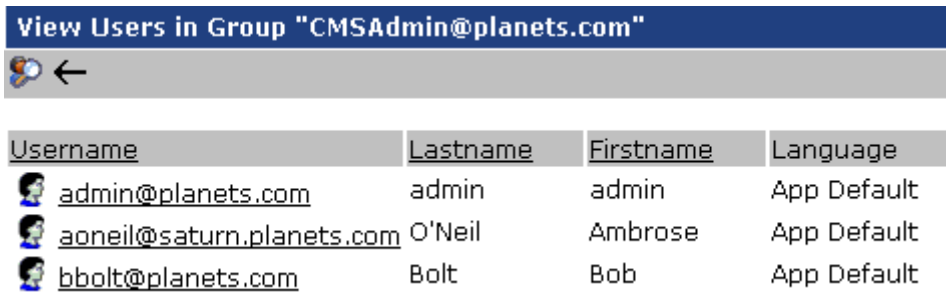
The View User Groups screen also provides a toolbar button ( ) that lets you add AD groups to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Groups screen appears.

View Users in Group Screen

The View Users in Group Screen displays, for each user in the group

- username and domain
- first and last name

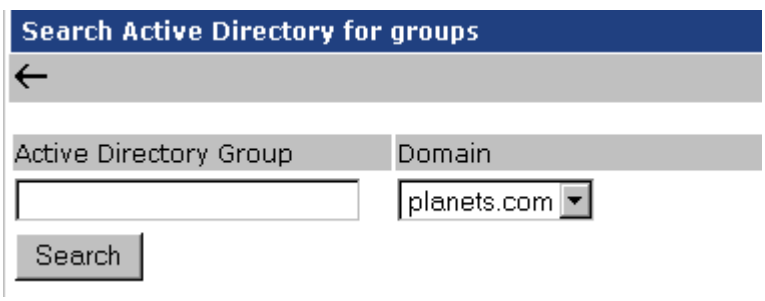
- language



The screen also displays the following buttons.

Button	Description
	Replace group *See Also:* "Replacing a User Group" on page 460
	Return to previous screen

The Search Active Directory for Groups Screen



Use this screen to add AD groups to Ektron CMS400.NET. 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 CMS400.NET. 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.

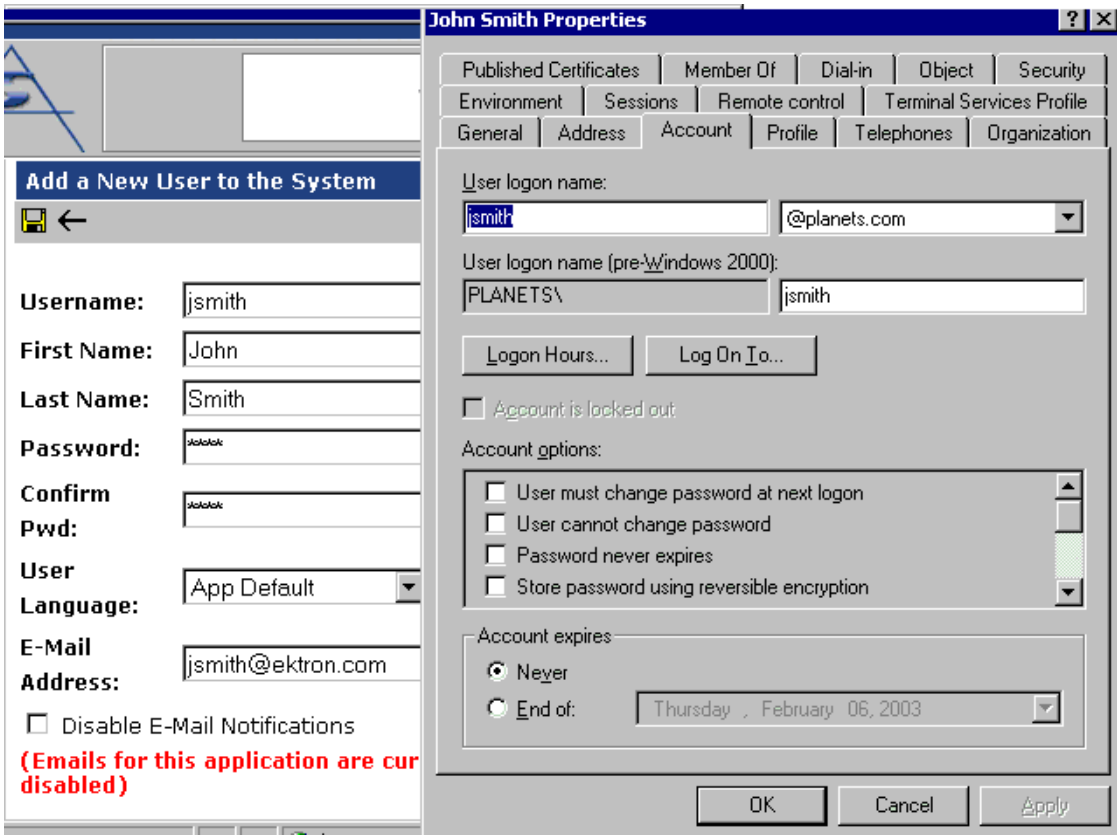
For example, if you know that the group begins with S and is in the planets domain, enter those criteria and you will get many fewer hits.

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 CMS400.NET. Then, click the Save button ( ) to copy their information.

Setup Guidelines

1. Make sure that the users and user groups in the Active Directory are defined correctly. Remember that, when you enable AD integration, first name, last name and email are copied from AD to Ektron CMS400.NET.
2. Determine which AD users and groups will be used in your Ektron CMS400.NET.
3. Try to match up names. For example, if a user in Ektron CMS400.NET has the username of jsmith, but that user in AD has a username of john.smith, rename the user in Ektron

CMS400.NET or in Active Directory so they match. This can be done during the actual integration, but doing it beforehand will simplify the process later.



4. Determine which users should be in which groups, and make sure those relationships exist in both Ektron CMS400.NET and AD.
5. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS400.NET to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)
6. Determine if you want users to automatically be added at log in or if you want to manually add them 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 log in 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**.

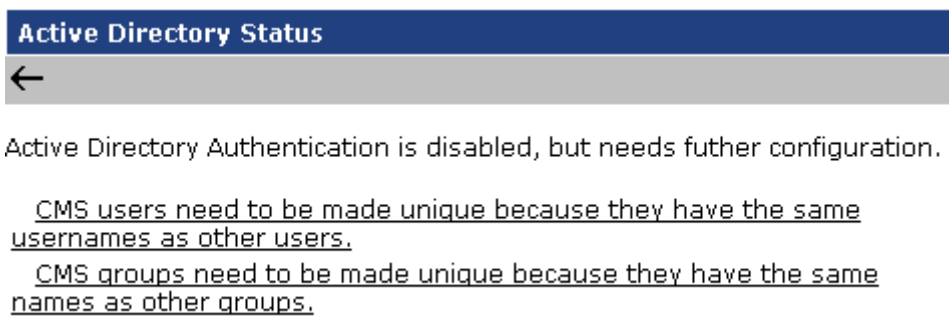
See Also: "The Active Directory Setup Screen" on page 461

If you do this, and any users or groups share the same name within different domains, the following message appears on the screen.

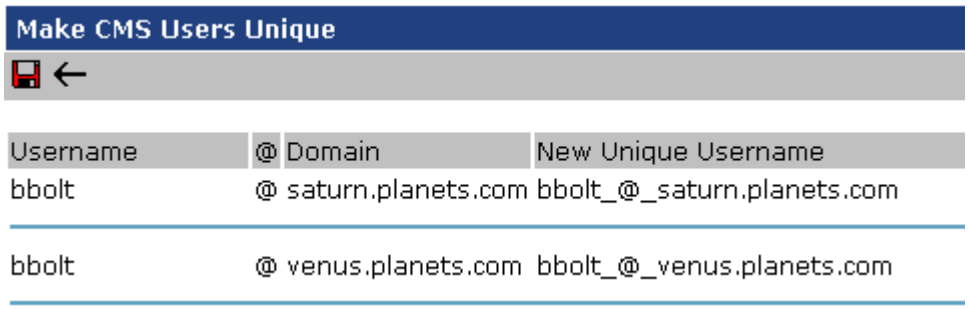
Active Directory Authentication is disabled, but needs further configuration

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.

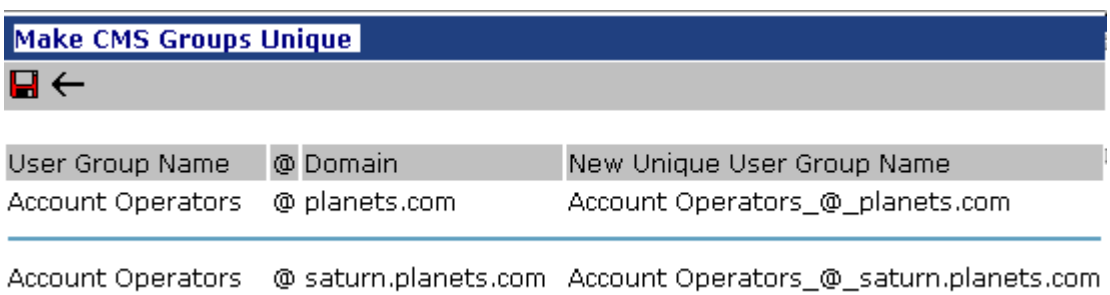


Click the message to proceed to the Make Ektron CMS400.NET Users Unique screen (illustrated below).



This screen lists all users whose user names are not unique and suggests a new, unique Ektron CMS400.NET 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 CMS400.NET Groups Unique screen would look like this.



Ektron recommends that you accept the suggested new names.

Click the Save ( ) button to do so.

One advantage of using the new name format is that, if you later decide to re-enable AD integration, the software can automatically associate the AD and Ektron CMS400.NET users or groups.

User Authentication Only Mode

How Information is Transferred from Active Directory to Ektron CMS400.NET

Ektron CMS400.NET 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 CMS400.NET.

- Changes to user logon name, domain and password must be made in the AD — you cannot update these fields in the Ektron CMS400.NET Edit User screens.
- When adding a new user to Ektron CMS400.NET, 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 CMS400.NET.

Which Information is Transferred from Active Directory to CMS400.NET

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 450

Adding User Information from AD to Ektron CMS400.NET

”Adding User Information from AD to Ektron CMS400.NET” on page 451

Changing the User Login Name in AD

If a user's *logon name* changes in the AD, it no longer matches the Ektron CMS400.NET logon name. This discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS400.NET 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 CMS400.NET user with Different AD user toolbar button ( ).
4. Select the AD user and domain.

See Also: "Associating Ektron CMS400.NET Users with Active Directory Users" on page 467

Editing User Information in Ektron CMS400.NET

Ektron CMS400.NET 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 CMS400.NET Edit User screen.

Deleting Users

See "Deleting Users" on page 454

Replacing a User

See "Replacing a User" on page 454

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 127.

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 461

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 CMS400.NET Users with Active Directory Users" on page 467

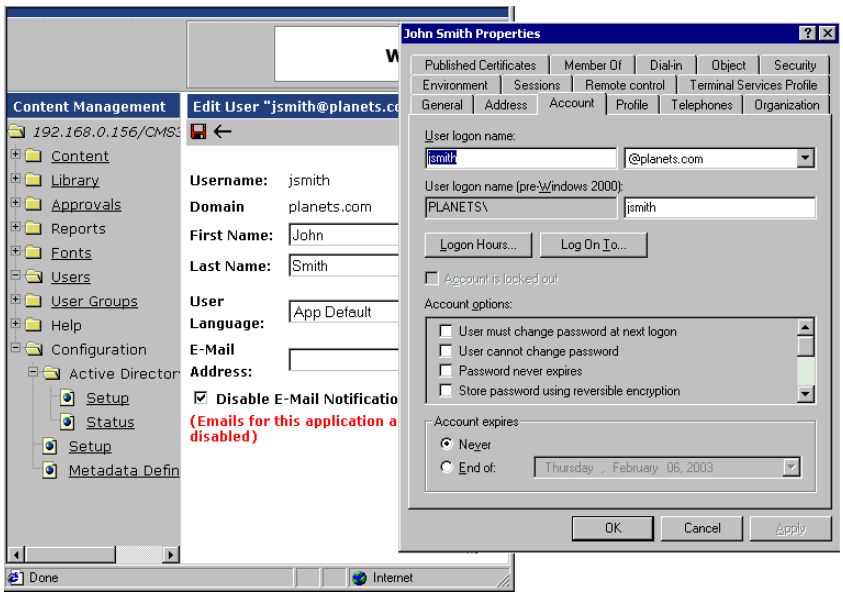
The View Users Screen works the same for both modes.

See Also: "The View User Information Screen" on page 470

Setup Guidelines

1. Make sure that each AD user to be used in Ektron CMS400.NET is defined correctly in the Active Directory. Remember that, when you enable AD integration, logon name and domain are copied from AD to Ektron CMS400.NET.

2. Try to match up names. For example, if an Ektron CMS400.NET user's username is jsmith, but that user's AD username is john.smith, rename the user in Ektron CMS400.NET or Active Directory so they match. While you can match user names when authentication is enabled, doing it beforehand simplifies the process.



3. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS400.NET 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 477

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS400.NET in the following manuals:

- *Ektron CMS400.NET Developer's Reference Manual*
- *Ektron CMS400.NET User Manual*
- *Ektron CMS400.NET Quick Start Manual*
- *Ektron CMS400.NET Setup Manual*

Support

If you are experiencing trouble with any aspect of Ektron CMS400.NET, please contact the Ektron Support Team via our Web Site:

http://www.ektron.com/support/cms400_support.aspx

Sales

For questions and answers about purchasing Ektron CMS400.NET 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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Appendix A: List of Supported Languages

Language	Locale id value
Afrikaans	1078
Albanian	1052
Arabic (Algeria)	5121
Arabic (Bahrain)	15361
Arabic (Egypt)	3073
Arabic (Iraq)	2049
Arabic (Jordan)	11265
Arabic (Kuwait)	13313
Arabic (Lebanon)	12289
Arabic (Libya)	4097
Arabic (Morocco)	6145
Arabic (Oman)	8193
Arabic (Qatar)	16385
Arabic (Saudi Arabia)	1025
Arabic (Syria)	10241
Arabic (Tunisia)	7169

Arabic (U.A.E.)	14337
Arabic (Yemen)	9217
Azeri (Cyrillic)	2092
Azeri (Latin)	1068
Basque	1069
Belarussian	1059
Bulgarian	1026
Burmese	1109
Catalan	1027
Chinese (Hong Kong SAR PRC)	3076
Chinese (Macau SAR)	5124
Chinese (PRC)	2052
Chinese (Singapore)	4100
Chinese (Taiwan)	1028
Croatian	1050
Czech	1029
Danish	1030
Dutch (Belgium)	2067
Dutch (Netherlands)	1043
English (Australian)	3081
English (Belize)	10249
English (Canadian)	4105
English (Caribbean)	9225

English (Ireland)	6153
English (Jamaica)	8201
English (New Zealand)	5129
English (Philippines)	13321
English (South Africa)	7177
English (Trinidad)	11273
English (United Kingdom)	2057
English (US)	1033
English (Zimbabwe)	12297
Estonian	1061
Faeroese	1080
Farsi	1065
Finnish	1035
French (Belgian)	2060
French (Canadian)	3084
French (Luxembourg)	5132
French (Monaco)	6156
French (Standard)	1036
French (Switzerland)	4108
Gaelic (Ireland)	2108
Galician (Spain)	1110
German (Austria)	3079
German (Liechtenstein)	5127

German (Luxembourg)	4103
German (Standard)	1031
German (Switzerland)	2055
Greek	1032
Gujarati (India)	1095
Hebrew	1037
Hindi (India)	1081
Hungarian	1038
Icelandic	1039
Indonesian	1057
Italian (Standard)	1040
Italian (Switzerland)	2064
Japanese	1041
Kannada (India)	1099
Kashmiri (India)	2144
Kazakh	1087
Korean	1042
Korean (Johab)	2066
Latvian	1062
Lithuanian	1063
Lithuanian (Classic)	2087
Macedonian	1071
Malay (Brunei Darussalam)	2110

Malay (Malaysian)	1086
Manipuri	1112
Marathi	1102
Norwegian (Bokmal)	1044
Norwegian (Nynorsk)	2068
Polish	1045
Portuguese (Brazil)	1046
Portuguese (Standard)	2070
Punjabi (Gurmukhi - India)	1094
Romanian	1048
Russian	1049
Serbian (Cyrillic)	3098
Serbian (Latin)	2074
Sindhi	1113
Slovak	1051
Slovenian	1060
Spanish (Argentina)	11274
Spanish (Bolivia)	16394
Spanish (Chile)	13322
Spanish (Columbia)	9218
Spanish (Costa Rica)	5130
Spanish (Dominican Republic)	7178
Spanish (Ecuador)	12298

Spanish (El Salvador)	17418
Spanish (Guatemala)	4106
Spanish (Honduras)	18442
Spanish (Mexican)	2058
Spanish (Modern Sort)	3082
Spanish (Nicaragua)	19466
Spanish (Panama)	6154
Spanish (Peru)	10250
Spanish (Puerto Rico)	20490
Spanish (Traditional Sort)	1034
Spanish (Uruguay)	14346
Spanish (Venezuela)	8202
Sutu	1072
Swahili (Kenya)	1089
Swedish	1053
Swedish (Finland)	2077
Tamil (India)	1097
Tatar (Tatarstan)	1092
Telugu (India)	1098
Thai	1054
Turkish	1055
Ukrainian	1058
Urdu (India)	2080

Urdu (Pakistan)	1056
Uzbek (Cyrillic)	2115
Uzbek (Latin)	1091
Vietnamese	1066
Welsh (United Kingdom)	1106