Ektron
CMS400.NET User Manual

Release 4.7, revision 3

For the latest version of this manual, go to

http://www.ektron.com/cms400-web-cms.aspx?id=1701#documentation

EKTRON, INC. SOFTWARE LICENSE AGREEMENT

** READ THIS BEFORE LOADING SOFTWARE**

YOUR RIGHT TO USE THE PRODUCT DELIVERED IS SUBJECT TO THE TERMS AND CONDITIONS SET OUT IN THIS LICENSE AGREEMENT. USING THIS PRODUCT SIGNIFIES YOUR AGREEMENT TO THESE TERMS. IF YOU DO NOT AGREE TO THIS SOFTWARE LICENSE AGREEMENT, DO NOT DOWNLOAD.

CUSTOMER should carefully read the following terms and conditions before using the software program(s) contained herein (the "Software"). Downloading and/or using the Software or copying the Software onto CUSTOMER'S computer hard drive indicates CUSTOMER'S acceptance of these terms and conditions. If CUSTOMER does not agree with the terms of this agreement, CUSTOMER should not download.

Ektron, Inc. ("Ektron") grants, and the CUSTOMER accepts, a nontransferable and nonexclusive License to use the Software on the following terms and conditions:

1.   Right to use: The Software is licensed for use only in delivered code form. Each copy of the Software is licensed for use only on a single URL. Each license is valid for the number of seats listed below (the "Basic Package"). Any use of the Software beyond the number of authorized seats contained in the Basic Package without paying additional license fees as provided herein shall cause this license to terminate. Should CUSTOMER wish to add seats beyond the seats licensed in the Basic Package, the CUSTOMER may add seats on a block basis at the then current price for additional seats (see product pages for current price). The Basic Packages are as follows:

Ektron CMS100 — Licensed for ten seats (10 named users) per URL.

Ektron CMS200 — Licensed for ten seats (10 named users) per URL.

Ektron CMS300 — Licensed for ten seats (10 named users) per URL.

Ektron CMS400.NET — Licensed for ten seats (10 named users) per URL.

Ektron DMS400 — Licensed for ten seats (10 named users) per URL.

Ektron eWebEditPro — Licensed for ten seats (10 named users) per URL.

Ektron eWebEditPro+XML — Licensed for ten seats (10 named users) per URL.

For purposes of this section, the term "seat" shall mean an individual user provided access to the capabilities of the Software.

The CUSTOMER may not modify, alter, reverse engineer, disassemble, or decompile the Software. This software product is licensed, not sold.

2.   Duration: This License shall continue so long as CUSTOMER uses the Software in compliance with this License. Should CUSTOMER breach any of its obligations hereunder, CUSTOMER agrees to return all copies of the Software and this License upon notification and demand by Ektron.

3.   Copyright: The Software (including any images, "applets," photographs, animations, video, audio, music and text incorporated into the Software) as well as any accompanying written materials (the "Documentation") is owned by Ektron or its suppliers, is protected by United States copyright laws and international treaties, and contains confidential information and trade secrets. CUSTOMER agrees to protect the confidentiality of the Software and Documentation. CUSTOMER agrees that it will not provide a copy of this Software or Documentation nor divulge any proprietary information of Ektron to any person, other than its employees, without the prior consent of Ektron; CUSTOMER shall use its best efforts to see that any user of the Software licensed hereunder complies with this license.

4.   Limited Warranty: Ektron warrants solely that the medium upon which the Software is delivered will be free from defects in material and workmanship under normal, proper and intended usage for a period of three (3) months from the date of receipt. Ektron does not warrant the use of the Software will be uninterrupted or error free, nor that program errors will be corrected. This limited warranty shall not apply to any error or failure resulting from (i) machine error, (ii) Customer's failure to follow operating instructions, (iii) negligence or accident, or (iv) modifications to the Software by any person or entity other than Company. In the event of a breach of warranty, Customer's sole and exclusive remedy, is repair of all or any portion of the Software. If such remedy fails of its essential purpose, Customer's sole remedy and Ektron's maximum liability shall be a refund of the paid purchase price for the defective Products only. This limited warranty is only valid if Ektron receives written notice of breach of warranty within thirty days after the warranty period expires.

5.   Limitation of Warranties and Liability: THE SOFTWARE AND DOCUMENTATION ARE SOLD "AS IS" AND WITHOUT ANY WARRANTIES AS TO THE PERFORMANCE, MERCHANTIBILITY, DESIGN, OR OPERATION OF THE SOFTWARE. NO WARRANTY OF

FITNESS FOR A PARTICULAR PURPOSE IS OFFERED. EXCEPT AS DESCRIBED IN SECTION 4, ALL WARRANTIES EXPRESS AND IMPLIED ARE HEREBY DISCLAIMED.

NEITHER COMPANY NOR ITS SUPPLIERS SHALL BE LIABLE FOR ANY LOSS OF PROFITS, LOSS OF BUSINESS OR GOODWILL, LOSS OF DATA OR USE OF DATA, INTERRUPTION OF BUSINESS NOR FOR ANY OTHER INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES OF ANY KIND UNDER OR ARISING OUT OF, OR IN ANY RELATED TO THIS AGREEMENT, HOWEVER, CAUSED, WHETHER FOR BREACH OF WARRANTY, BREACH OR REPUDIATION OF CONTRACT, TORT, NEGLIGENCE, OR OTHERWISE, EVEN IF COMPANY OR ITS REPRESENTATIVES HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH LOSS.

6. Miscellaneous: This License Agreement, the License granted hereunder, and the Software may not be assigned or in any way transferred without the prior written consent of Ektron. This Agreement and its performance and all claims arising from the relationship between the parties contemplated herein shall be governed by, construed and enforced in accordance with the laws of the State of New Hampshire without regard to conflict of laws principles thereof. The parties agree that any action brought in connection with this Agreement shall be maintained only in a court of competent subject matter jurisdiction located in the State of New Hampshire or in any court to which appeal therefrom may be taken. The parties hereby consent to the exclusive personal jurisdiction of such courts in the State of New Hampshire for all such purposes. The United Nations Convention on Contracts for the International Sale of Goods is specifically excluded from governing this License. If any provision of this License is to be held unenforceable, such holding will not affect the validity of the other provisions hereof. Failure of a party to enforce any provision of this Agreement shall not constitute or be construed as a waiver of such provision or of the right to enforce such provision. If you fail to comply with any term of this License, YOUR LICENSE IS AUTOMATICALLY TERMINATED. This License represents the entire understanding between the parties with respect to its subject matter.

YOU ACKNOWLEDGE THAT YOU HAVE READ THIS AGREEMENT, THAT YOU UNDERSTAND THIS AGREEMENT, AND UNDERSTAND THAT BY CONTINUING THE INSTALLATION OF THE SOFTWARE, BY LOADING OR RUNNING THE SOFTWARE, OR BY PLACING OR COPYING THE SOFTWARE ONTO YOUR COMPUTER HARD DRIVE, YOU AGREE TO BE BOUND BY THIS AGREEMENT'S TERMS AND CONDITIONS. YOU FURTHER AGREE THAT, EXCEPT FOR WRITTEN SEPARATE AGREEMENTS BETWEEN EKTRON AND YOU, THIS AGREEMENT IS A COMPLETE AND EXCLUSIVE STATEMENT OF THE RIGHTS AND LIABILITIES OF THE PARTIES.

LA10031, Revision 1.5

Trademarks

All terms in this manual that are known to be trademarks have been capitalized. Ektron, Inc. cannot attest to the accuracy of this information. Use of a term in this manual does not affect the validity of any trademark.

The following trademarks might appear in Ektron maunals:

Active Directory®, ActiveX®, Authenticode®, BackOffice®, ClearType®, Developer Studio®, FrontPage®, IntelliSense®, JScript®, Microsoft ®, MS-DOS®, SharePoint ® Visual C++®, Visual C#®, Visual InterDev®, Visual J++®, Visual J#®, Visual Studio®, Visual Web Developer TM, Win32®, Win32s®, Windows®, Windows NT®, Windows Server TM, Windows Server System TM, Netscape®, Netscape Navigator®, Mozilla TM, Firefox TM

Table of Contents

What's New in the 4.7 Release

- **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.

- **New Toolbar Menus** - 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. For more information, see "The Floating Toolbar" on page 2.

- **Reporting** - New content expiration report. From the workarea, you can see which content is about to expire. For more information, see "Content to Expire Report" on page 101.

- **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 "Setting Archive Options" on page 53.

- **Email** - Users of the workarea can quickly and easily send emails to those who are also active in the work area. This increases communication among users. For more information, see "Sending Instant Email" on page 22.

- **User Customization** - The following customization settings are available: work area size, login landing page, and starting folder. An administrator can override these settings for a site. For more information, see "Work Page Size" on page 217.

- **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 196.

- **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 "Viewing a Folder" on page 30.

Introduction to Ektron CMS400.NET

Using **Ektron CMS400.NET** to manage Web content is easy once you know the basics of setting up and maintaining your site. This manual explains how to maintain an **Ektron CMS400.NET** site from a user's point of view. By reading this manual, you will gain an understanding of how **Ektron CMS400.NET** works.

This section introduces basic concepts that you should understand when beginning to work with **Ektron CMS400.NET**.

What is a Content Block?

Any Web site consists of several pages. Each page is made up of one or more *blocks* of content. For example, the home page of the sample Web site that is installed with **Ektron CMS400.NET** is below.

After you sign in, notice that, as you move the cursor, colored borders appears around one or more areas of the page. Each

surrounded area is a *content block* that can be edited independently. The border disappears when you move the cursor out of the area. Your system administrator controls the design of each page and determines where the content blocks appear.

NOTE   The colored borders appear when you are not in site preview mode. *See Also:* "Site Preview" on page 10. Also, your administrator can set up your system so that the borders always appear on a page, instead of appearing only when you move the mouse over them.

RC International

Home | Products | Support | News | Careers | Search | Calendar   Login | Contact

Lots of new features in Ektron CMS300!
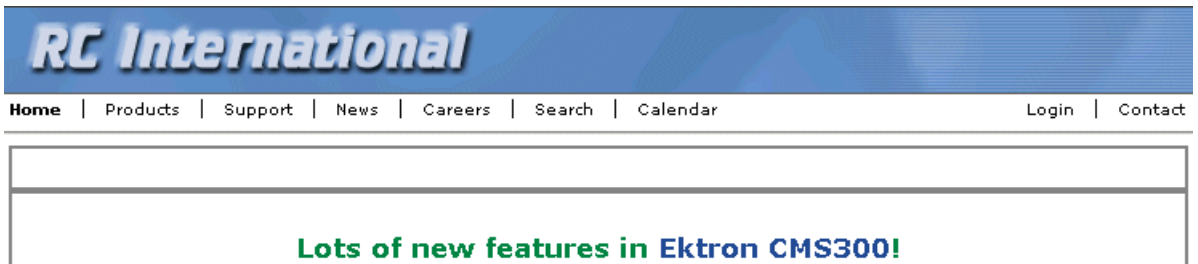
NEW FEATURE: Trinity In-Line Pipe

Trinitys new pipe and manifold are for rear exhaust engines and are now used in both the Sportster and the cheetah. Both the manifold and pipe are made from high-quality aluminum. This new pipe is more durable and will withstand a bad crash.

NEW PRODUCT: Introducing the RC Redstar

RC International is proud to introduce the RC Redstar. This new addition to the RC International fleet brings new options to our customers. With laser-cut balsa wings and a wing span of 71", this is one plane that has to be seen.

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

To learn what the border color indicates, see "Appendix A: Content Statuses" on page 394.

The Floating Toolbar

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

NOTE   Your administrator can set up your system to have borders always appear on a page. In that case, the toolbar always appears in the content block -- you don't need to click the mouse to make it appear. For information on the classic user
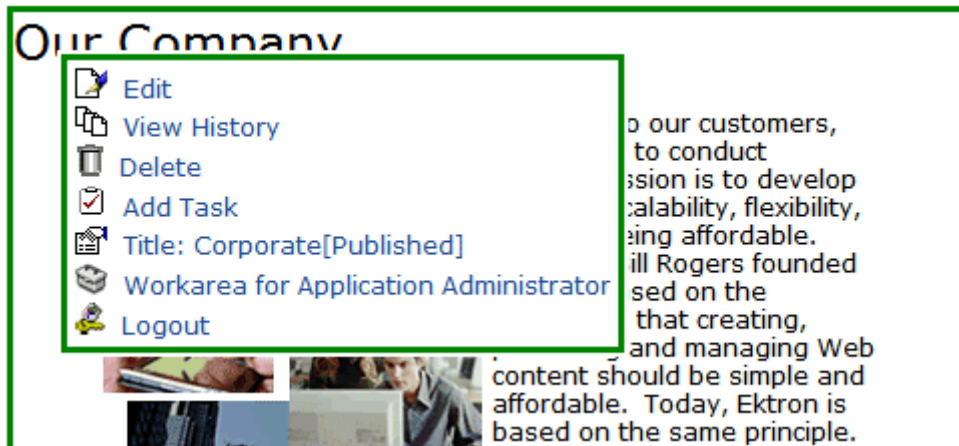
There are two types of floating toolbars, vertical (pictured above) and horizontal (pictured below). The default is vertical.

With the vertical toolbar, you can see the tooltip text at all times. On the horizontal toolbar, you must move the cursor over the button to see its tooltip text.

NOTE

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

If granted permission by your administrator, you can create new content blocks, and edit or delete existing ones. Most of your work with **Ektron CMS400.NET** involves working with content blocks.

Buttons on the Menu

The following table describes each button that may appear.

Button	Name	Description	More Information
	Approve	Approve or decline a request to publish or delete a content block	"Approving/Declining Content Blocks" on page 64
	Assign Task	Assign a task to a user	"Managing Tasks" on page 196
	Delete	Open content block's View Content page	"Viewing a Content Block" on page 32
	Edit	Check out content block for editing	"Editing a Content Block" on page 39
	Logout	Log out of **Ektron CMS400.NET** view of Web site	"Logging Out of the Sample Site" on page 11
	Preview	Preview content block before it is published	
	Properties	Open content block's View Content page	"Viewing a Content Block" on page 32
	View Content Difference	Display differences between a previous and published version of content block	"Comparing Versions of a Content Block" on page 75
	View History	Open View History area, where you can view previous versions of content block	"Viewing and Restoring Previous Content Blocks" on page 82
	Workarea	Opens Workarea, from which you can perform all **Ektron CMS400.NET** tasks	"The Workarea and Smart Desktop" on page 13

Workflow in Ektron CMS400.NET

Organizations typically want a Web site that is updated frequently with the latest information. They also want to decentralize the updating process, so that non-technical users from any department can make changes. Further, organizations want oversight over those changes to ensure the accuracy of the information, that the content adheres to corporate guidelines, etc.

Ektron CMS400.NET manages the lifecycle of a content block, from creation through approval and publication. It helps your organization set up a process for overseeing changes to a Web site, indicate a content block's status within that lifecycle, and inform the next approver that it is their turn to review a content block.

Editing a Content Block

Finding a Content Block

Much of your work involves editing existing content or creating new content. **Ektron CMS400.NET** provides three methods for finding content to be updated. You can use whichever method is easiest.

- Navigate through your Web site to the content block you want to edit

- Find the content block through the *Workarea*, which resembles Windows Explorer and lets you find a content block by navigating through a folder tree. *See Also:* "The Workarea and Smart Desktop" on page 13

- Use the Search button (🔍), which appears on many screens. When clicked, a screen prompts you to enter keywords and then finds content blocks containing the keywords.

The Editing Process

After you find a content block, click the Edit button (📝) to open it in an editor. Below is an example of a content block in the editor.
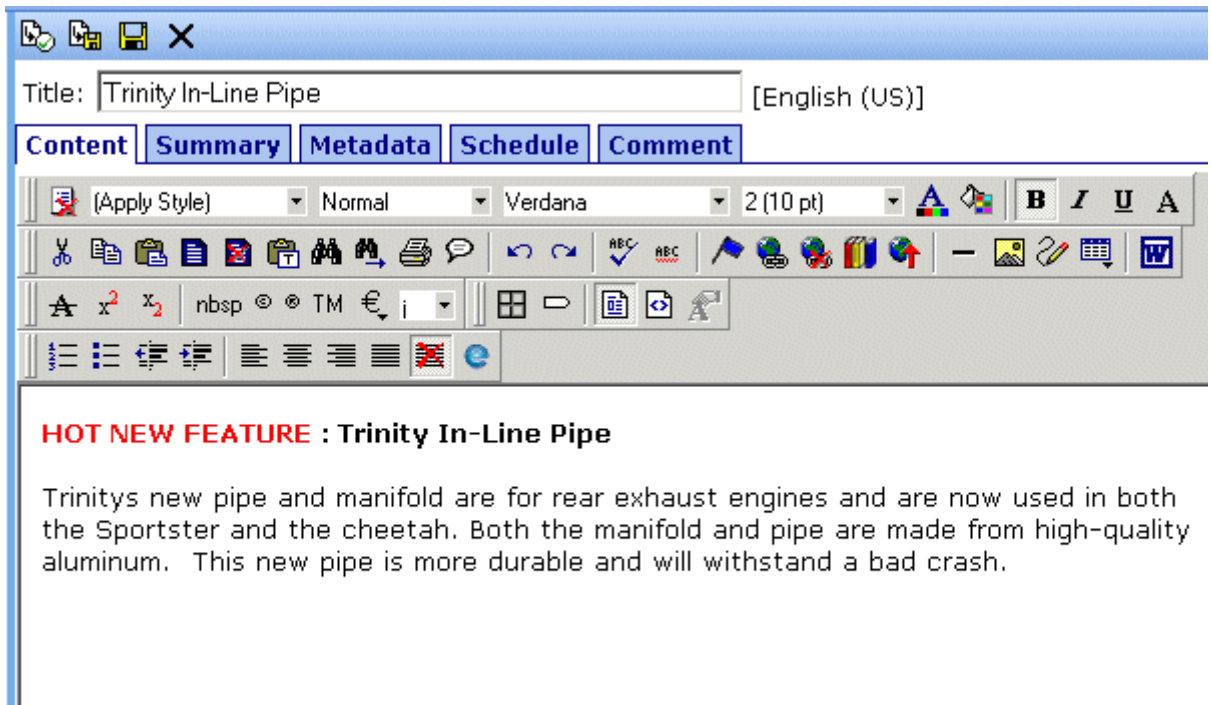
The editor resembles popular word processing software. You can enter text, then select it and click a button to change its display properties. For example, you can make text bold, change the color, or copy and paste it. You can also insert images, tables, links to other Web pages, and check spelling,

The Lifecycle of a Content Block

After you edit the content block, you typically submit it for approval to one or more individuals who oversee changes to your Web site. These people can review, edit and approve the change. When the last approver signs off, the new content becomes available on the Web site.

In some cases, you are one of the content approvers. In this case, you receive an email notifying you that a content block needs approval. You look it over, change it as needed, then pass it on to the next approver. If you do not agree with the changes, you can *decline* the request. In this case, the user who made the edits is informed that the change is not approved.

The following graphic illustrates the content approval cycle.
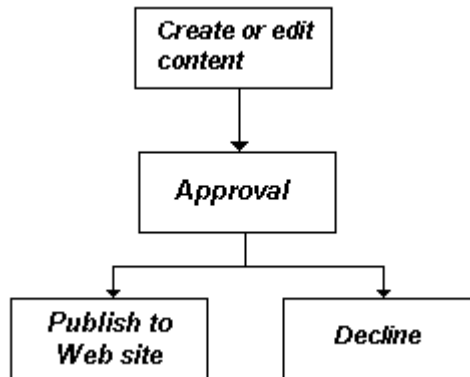
To help track a content block's position in this workflow, **Ektron CMS400.NET** assigns a status to each content block. The status determines what you can do with a content block, and indicates what must occur in order for it to get published to the web site. For more information, see "Appendix A: Content Statuses" on page 394.

Logging In and Out

This section explains how to log in and out of **Ektron CMS400.NET**, and to use the site preview feature.

Prerequisites

Once your Webmaster or administrator installs Ektron CMS400.NET, you need the following items before you can use it.

- URL (Web address) of Ektron CMS400.NET Web site
- Username and password

Once you acquire both, you can log into Ektron CMS400.NET and begin managing Web site content.

NOTE   This manual uses the Ektron CMS400.NET sample Web site to demonstrate the product.

Logging into the Sample Web Site

To access the Ektron CMS400.NET sample site:

1. In your Web browser, navigate to the URL of your Ektron CMS400.NET Web site. Your system administrator provides this.
2. Click **Login** at the top right corner of the screen.

3. The login screen appears.

RC International

| Home | Products | Support | News | Careers | Search | Calendar | | **Login** | Contact Ektron |

Login

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

Copyright 2003 Ektron, Inc. Sample Site

Javascript Syndication Demo

Login Help: username *admin* and password *admin*

Quick tips:

Icons

Edit content block

View history information

4. Click the **Login** button.

5. The login dialog box appears.

Ektron CMS Login - Microsoft I...

Enter your username and password.

User:

Pwd:

LOGIN

6. Enter your username and password.

7. Click the **Login** button.

8. The Web page appears.

You can navigate around your Web site as you could before signing in. But now, the content is surrounded by a colored box when you move the cursor over it (illustrated below).
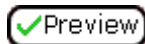
Site Preview

While logged into Ektron CMS400.NET, you can preview the Web site as it would appear to visitors, or view it in regular view.

Button Appearance	Status	Description
X Preview	Preview Mode	Content blocks appear as last *edited*. The advantage of this mode is that you can see a Web page as it will appear to on your site. Continue editing until you are satisfied with its appearance. In Preview mode, click the **Preview** button to switch to regular mode.
✓ Preview	Regular View	The most recently *published* versions of content blocks appear. In this mode, colored borders surround content blocks when you move the cursor over them. In regular view, click the **Preview** button to switch to preview mode.

Toggling Site Preview

To toggle site preview on and off, follow these steps.

1. Navigate to a page that includes the login/logout buttons.

2. Click the **Preview** button.
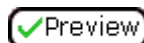
3. The Web site is now in preview mode.

4. To turn preview mode off, click the () button on the login screen.

Logging Out of the Sample Site

To log out of Ektron CMS400.NET, follow these steps.

1. Click the **Logout** button (🐝) in a content block's floating

    toolbar, or click the **Logout** button (🐝 Logout) on the Web
    page.

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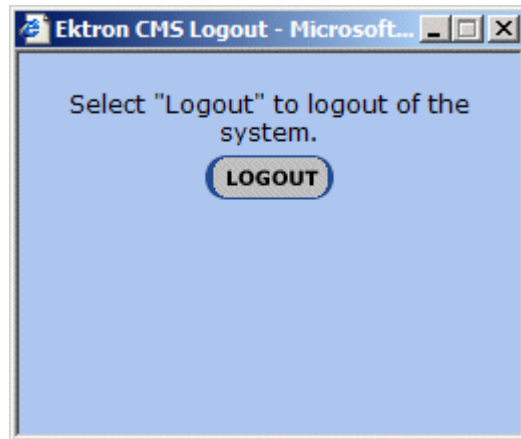
3. Click the **Logout** button.

4. You return to the Web page from which you logged out.
    However, it is in standard view, not Ektron CMS400.NET view.

The Workarea and Smart Desktop

The Workarea is a central screen from which you can perform all activities within **Ektron CMS400.NET**. From it, you can

- access the Smart Desktop
- view the system's top level folders
- navigate through the folder structure
- perform actions on content blocks

Accessing the Workarea

To access your Workarea, follow these steps.

1. Click the Workarea button at the bottom of the screen
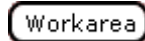
   Workarea

   or the Workarea button (🞂) in a content block's floating toolbar.
2. The Workarea appears.

3. The following illustrates one of several screens that may appear in the Workarea. Your system administrator determines which screen appears for you.
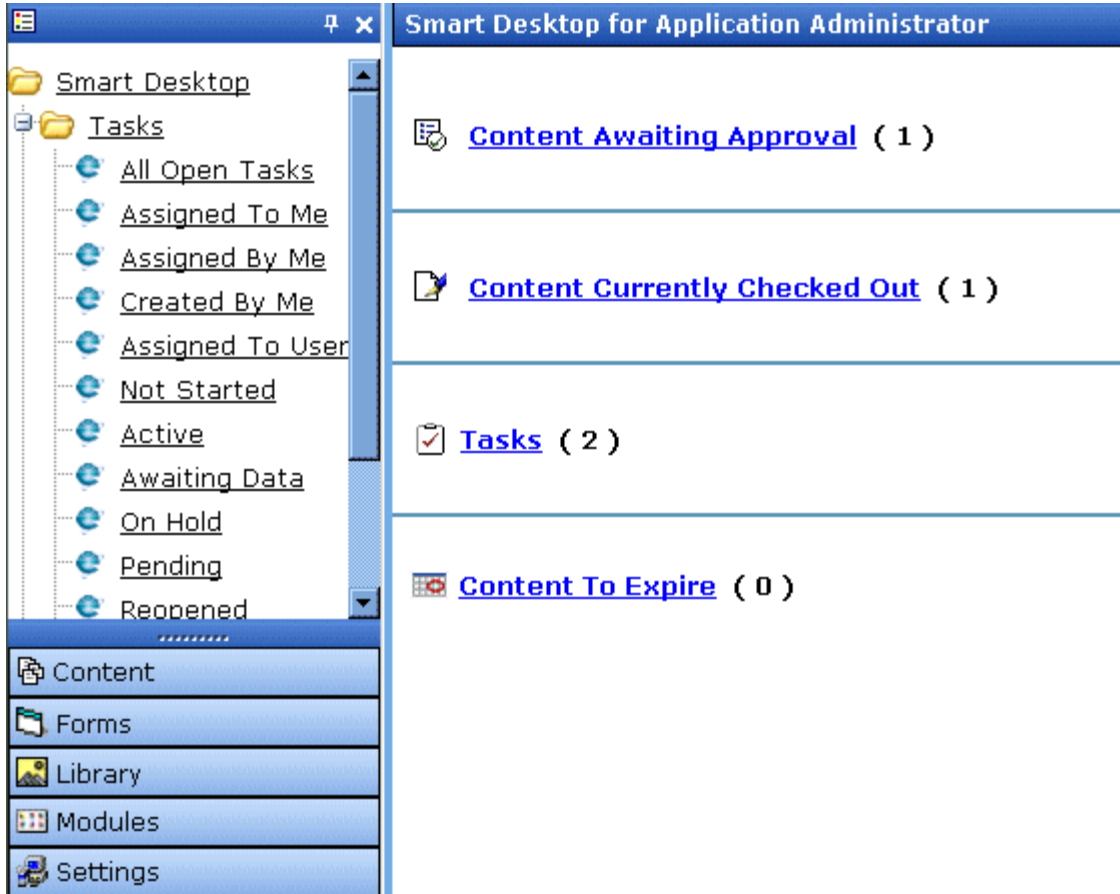
Closing the Workarea

To close the Workarea, click ⊠ in the upper right corner of the window. When you close the Workarea, you return to the Ektron CMS400.NET view of your Web site. You do not exit Ektron CMS400.NET.

Understanding the Smart Desktop

The *Smart Desktop* is one of **Ektron CMS400.NET**'s main screens. To access it from wherever you are working in **Ektron CMS400.NET**, click the button in the top left corner (circled below).
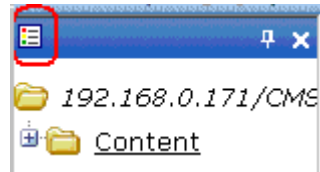
The Smart Desktop consists of three sections, illustrated below.
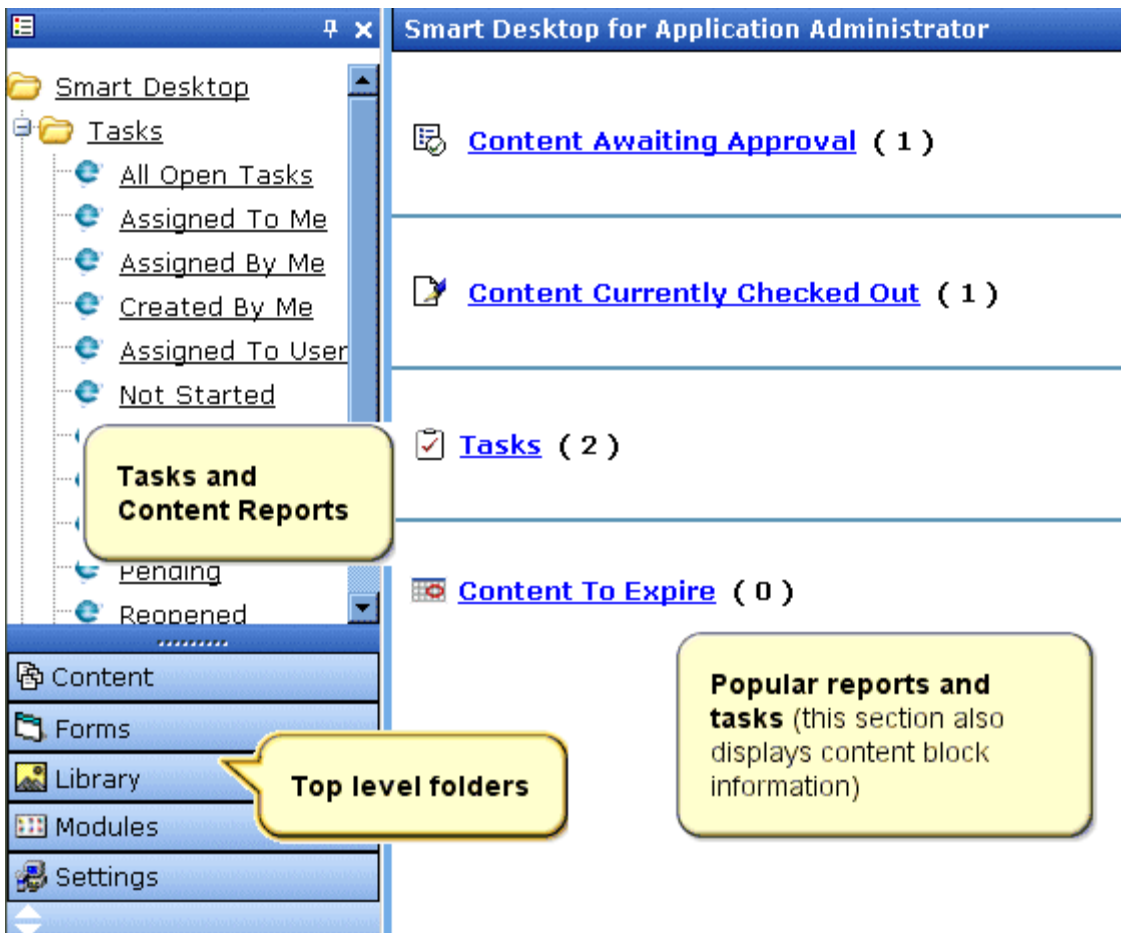
- The right frame displays

  – **Content awaiting approval** - content blocks that you need to approve before they proceed to the next approver or be published if you are the final approver. *See Also:* "Approvals Reports" on page 94

– **Content currently checked out** - all content in a checked-out status. This content cannot be edited by other users until the user who checked it out or the system administrator checks it in. *See Also:* "Checked Out Report" on page 97

– A list of **tasks** assigned to you *See Also:* "Managing Tasks" on page 196

– The **Content to Expire Report** - see "Content to Expire Report" on page 101

If you select a folder from the left frame, the right frame displays content blocks in that folder. If you select a content block from the list, information about it fills the right frame.

- The top left frame displays the folder tree for the Smart Desktop folder, which has two sub-folders

  – Tasks (See "Managing Tasks" on page 196)

  – Content Reports (see "Content Workflow Reports" on page 89)

- To bottom left frame displays the top-level folders in **Ektron CMS400.NET**. Your display may be different depending on whether or not you are an administrator.

  – Content folder (see "Working with Folders and Content Blocks" on page 25)

  – Forms folder (see the **Ektron CMS400.NET** Administrator Manual chapter "Special Features," section "Working with HTML Forms")

  – "Library Folder" on page 103

  – Modules (see "Working with Collections" on page 120, "Working with Menus" on page 139, "Working with Calendars" on page 175, and "Private Content & Memberships" section of the "Managing Users & User Groups" chapter of the **Ektron CMS400.NET** Administrtor manual)

> – Settings folder, which includes and

Navigating Within the Smart Desktop

Ektron CMS400.NET's top level folders appear in the lower left corner of the Smart Desktop. Use them to access all other folders.

To open any top level folder, click it. When you do, it appears in the frame above. Typically, you would a click top-level folder to see its sub-folders, then click a sub-folder to see its content blocks.

The following graphic illustrates the location of **Ektron CMS400.NET**'s major features from the Smart Desktop.

Ektron CMS Workarea Site Map
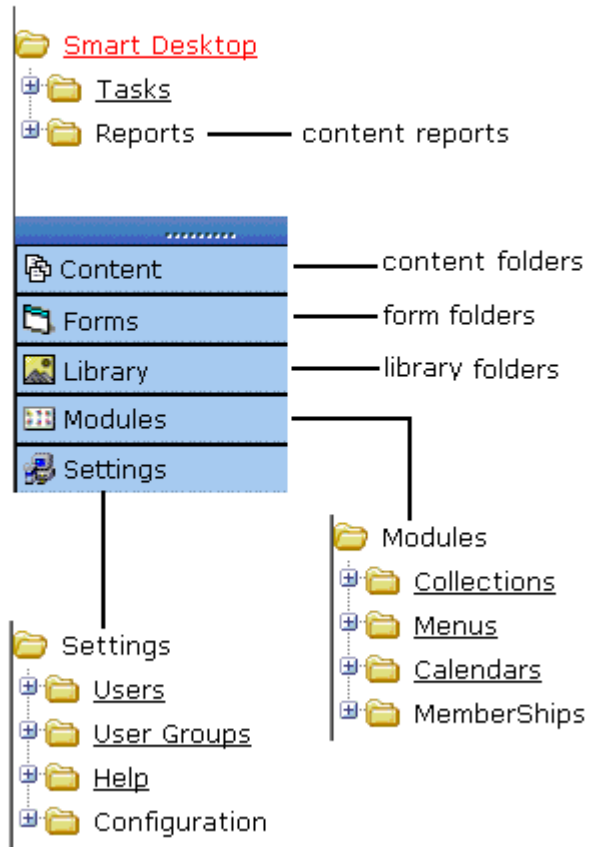
From the Smart Desktop, you can also:

- ”Modify the Display of Top Level Folders” on page 18
- ”Hide the Left Panel of the Workarea” on page 20

Modify the Display of Top Level Folders

The display of top level folders can appear in two formats:

- a full button with an icon and text ( )

- just an icon on the bottom of the left frame

(

The full display is easier to see, but the icon format allows more space for the folder structure. You can decide which option best suits your needs.

Switching Between Full Buttons and Icons

By default, top-level folders appear as full buttons. To switch the display of all folders to icons, double click the down arrow circled below.

To switch back to full buttons, double click the up arrow circled above.

You can also switch the display of the folders one at a time by clicking the up or down arrow.

As an alternative method of switching the display, you can

1. Place the cursor on the bar above the display of top-level folders. (The bar has several dots in the middle.)
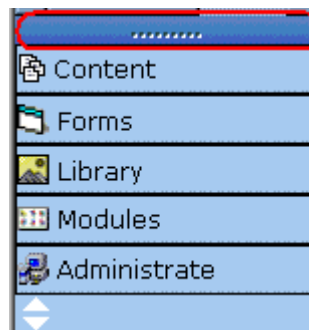
2. When the cursor turns to a double headed arrow, drag it to the bottom bar.

To return the display to full buttons, drag the same bar above.

Hide the Left Panel of the Workarea

You can hide the left frame of the Workarea to provide more space for working in the right frame. Below is an example of the Workarea with a minimized left frame. Note that you cannot see the folder display in the left frame.
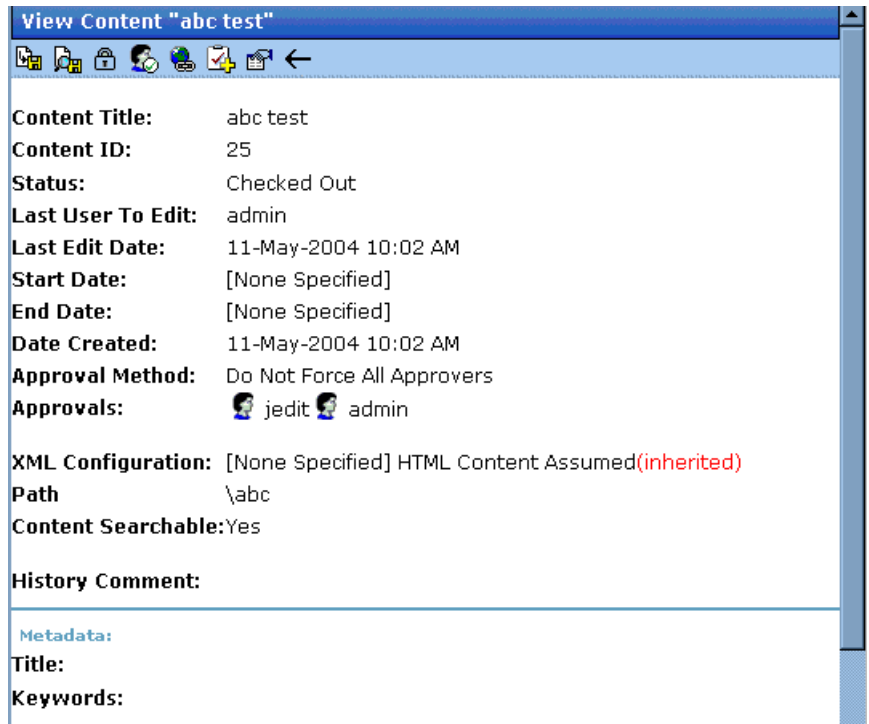
To minimize the left frame, click the white X near the top of the left frame.
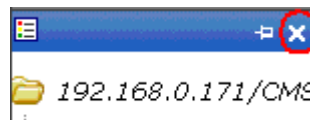
The left frame remains minimized until you move the cursor to the left of the bar circled below.
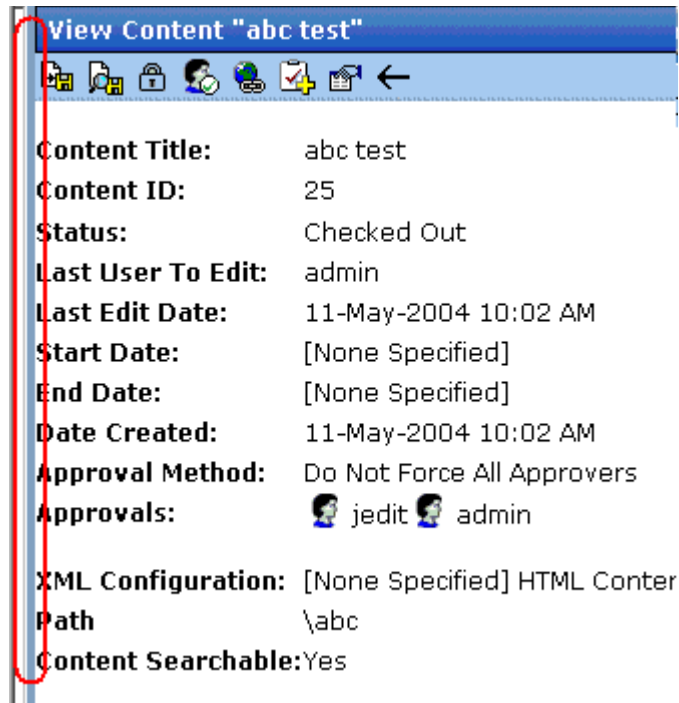
Using Auto Hide

The Workarea screen also provides an *autohide* feature, which quickly switches between full right frame view and combination right-left frame view.

When autohide is turned on, the left frame is minimized unless you place the cursor to the left of the bar circled above. If you place the cursor there, the left frame appears. As soon as you move the cursor back to the right frame, the left frame disappears.

To turn on the autohide feature, click the push pin icon near the top of the left frame.

When you do, the push pin turns 90 degrees to indicate autohide is on.
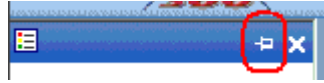
To turn off autohide, move the cursor to the left frame and click the push pin icon. When you do, the push pin returns to its original position.

Sending Instant Email

Ektron CMS400.NET lets you send email instantly to a user or user group from many screens available from the Smart Desktop. Your ability to send instant mail is indicated by a small mail icon next to a user or group name (indicated in red below).

When you click 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.
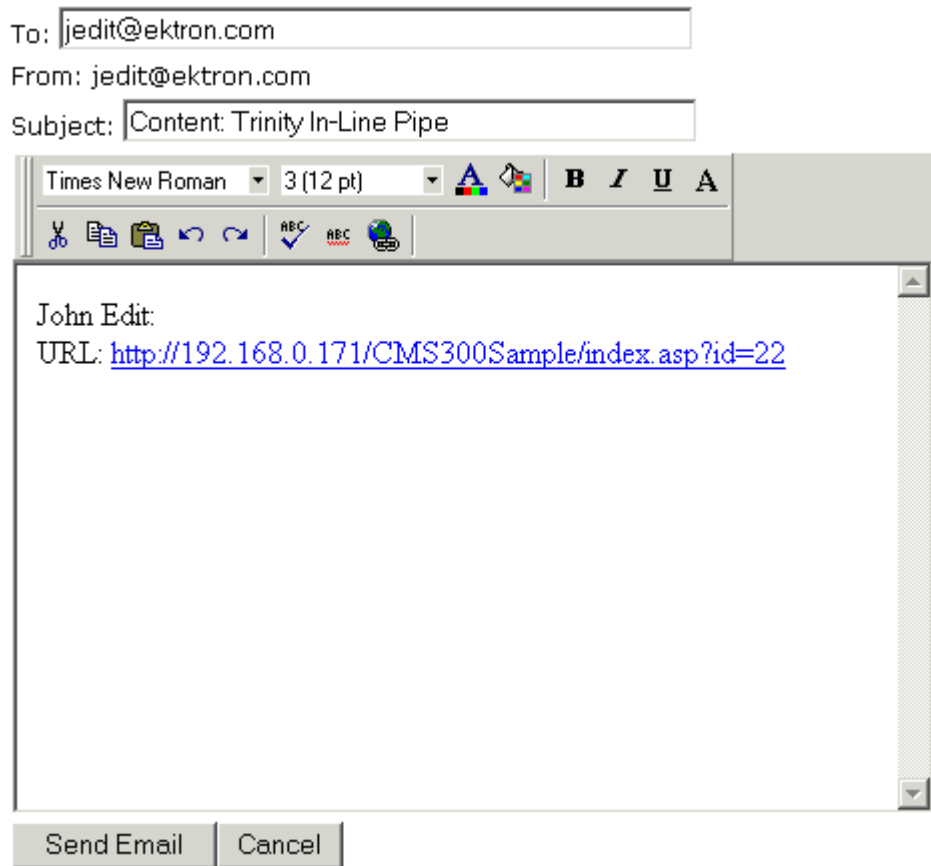
The following sections explain how to set up and use Instant email.

Conditions for Instant eMail

- You must have a valid email address set up in the user profile. If not, email icons do not appear in **Ektron CMS400.NET**. *See Also:* "Updating Your User Profile" on page 215

- Your system administrator must enable the feature.

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. *** Warning: Destination address is missing * *** ո: Administrator@Ektron.com 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	You	No
Subject	If the email message is linked to a content block, its title appears.	Yes
Body of message	If the email message is linked to content block, a link to the content block appears.	Yes

Working with Folders and Content Blocks

Every content block resides in the Content folder or one of its sub-folders. So, to work with an existing content block or create a new one, you must first navigate to its folder.

A typical content folder screen appears below. It consists of three sections:

- The top left frame shows the folder structure. You can click any folder to display its content blocks in the right frame, while its sub-folders appear below it.

- The right frame shows content blocks in the currently selected folder. Above the right frame is a toolbar of buttons that represent tasks you can perform on a selected content block.

- The lower left frame shows **Ektron CMS400.NET**'s top level folders

View Contents of Folder "Content"					Toolbar buttons

View: English (US)

Title	Language	ID	Status	Date Modified	Last Editor
Contact Ektron	1	15	O	26-May-2004 11:22 AM	Administrat
Greeting	1	24	O	04-Dec-2003 10:57 AM	Administrat
Home Page Content	1	1	T	04-Dec-2003 10:20 AM	Edit, John
Introducing the RC Redstar	1	23	O	04-Dec-2003 10:26 AM	Administrat
my first content block	1	28	I	07-Oct-2004 04:37 PM	Bolt, Bob
Private Content	1	2	A	03-Mar-2004 03:12 PM	Administrat
Support Page	1	8	A	27-Aug-2002 02:18 PM	Administrat
Trinity In-Line Pipe	1	22	I	04-Dec-2003 11:14 AM	Administrat

Folder structure

Content

Human Resources
Marketing
Products
RC_Cars
RC_Planes
Support
Syndication

Content blocks in selected folder

Content
Forms
Library
Modules
Settings

In this chapter, you learn about adding, editing, publishing, and deleting content blocks through the following subtopics. (Permissions and Approvals are discussed in later chapters.)

- "Workarea Toolbar Buttons" on page 27
- "Viewing a Folder" on page 30
- "Viewing a Content Block" on page 32
- "Adding a Content Block" on page 36
- "Editing a Content Block" on page 39
- "Deleting a Content Block" on page 41
- "Search Content Folder" on page 43
- "Adding Sub-Folders" on page 46
- "Deleting Folders" on page 47
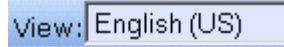
Workarea Toolbar Buttons

The top of many Workarea screens feature a toolbar that contains buttons for performing actions. This section explains the buttons' functions.

Button	Name	Description
	Add	Adds items in several places.
	Add Calendar Event	Accesses the add calendar event screen in the Workarea.
	Add Content Block	In a content folder, opens the editor and allows you to create a new content block. *See Also:* "Adding a Content Block" on page 36
	Add Content Folder	In a content folder, allows you to create a sub-folder to further organize your content blocks. *See Also:* "Adding Sub-Folders" on page 46
	Add Library Item	In the library folder, allows you to upload an image or file, or add a hyperlink or quicklink to use in content. *See Also:* "Library Folder" on page 103
	Add Task	Assign task to a user. *See Also:* "Managing Tasks" on page 196
	Approvals	View approval chain for folder or content block. *See Also:* "Approving/Declining Content Blocks" on page 64
	Approve	Approve content that awaits your approval.
	Approve All	In the approvals folder, approves all content awaiting your approval with one click.
	Archived Content	If current content is being displayed, switch to display archived content. If archived content is being displayed, switch to display current content. *See Also:* "Setting Archive Options" on page 53

Button	Name	Description
←	Back	Return to previous screen.
	Calendar	Lets you choose when content will go live. *See Also:* "Working with Calendars" on page 175
✕	Cancel	Cancels action you are performing without saving the information.
	Check-in	Saves and checks in content block you are working on. *See Also:* "Checked-In Content" on page 396
	Check-out	Checks out a content block to edit; prevents others from simultaneously working on it. "Checked Out Content" on page 398
	Collection	Accesses the collection area for a content block; lets you create, edit, and delete collections. *See Also:* "The screen is refreshed, and the folder is deleted." on page 48
	Decline	Declines an approval request submitted to you.
	Delete	Deletes selected item.
	Delete Content	Deletes multiple content blocks at once.
	Delete Folder	Deletes current content folder.
	Do Not Apply XSLT	Removes XSLT applied to XML content viewed in the content history area.
	Edit	Edits content or specific criteria in the Workarea.
	Insert Library Item	Inserts selected library item into your content block. *See Also:* "Library Folder" on page 103

Button	Name	Description
	Link Check	Identifies content blocks or assets with a hyperlink to the current content block. You would typically use this feature to remove the links before deleting a content block.
		If you do not remove the links, they are inoperative after the content block is deleted.
	Overwrite	Replaces an image or file with a newer version.
		See Also: "Overwriting Files" on page 112
	Preview	Previews item that was or will be added.
	Publish	Save and publish the content block.
	Remove	Removes items from folders and lists in the Workarea.
	Reorder	Changes the sequence of links in a collection.
		See Also: "The screen is refreshed, and the folder is deleted." on page 48
	Restore	Restores previously published content block.
		See Also: "Viewing and Restoring Previous Content Blocks" on page 82
	Save	Saves content that was modified.
	Search	Searches content and library folder screens.
		See Also: "Your system administrator controls these settings." on page 106
	Show Calendar	Displays the calendar in the Workarea.
	Submit	Saves and submits content to next approver in the approval chain.
	Update	Changes are saved and content is updated.

Button	Name	Description
	View Date	View all calendar events for a selected day.
	View Difference	Opens the View Content Difference feature. *See Also:* "Comparing Versions of a Content Block" on page 75
	View History	View history of selected content block. *See Also:* "Viewing and Restoring Previous Content Blocks" on page 82
	View Published	Displays currently published version of content block.
	View Staged	Displays staged content. *See Also:* "Staged Content" on page 401
View: English (US) Select language		Selects the language of the content blocks being displayed.

Viewing a Folder

To view any folder under the content folder, follow these steps.

1. Access the Workarea, as described in "Site Preview" on page 10.

2. Click **Content** from the left lower side of the Workarea.
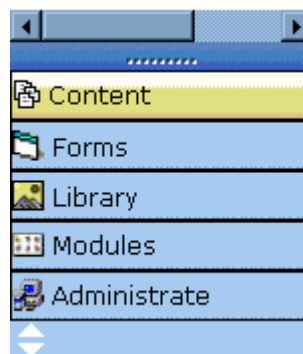
3. All content blocks in the content folder and the selected
    language appear on the right side of the screen. Sub-folders
    appear in the upper left frame.

4. To work with any folder or its content blocks, click the folder.
    When you do, its content blocks appear in the right frame.

NOTE You can only view folders for which your system administrator has granted
permission.

5. If your system supports more than one language, you can
    select content blocks for a particular language or all languages
    using the language dropdown list (illustrated below).
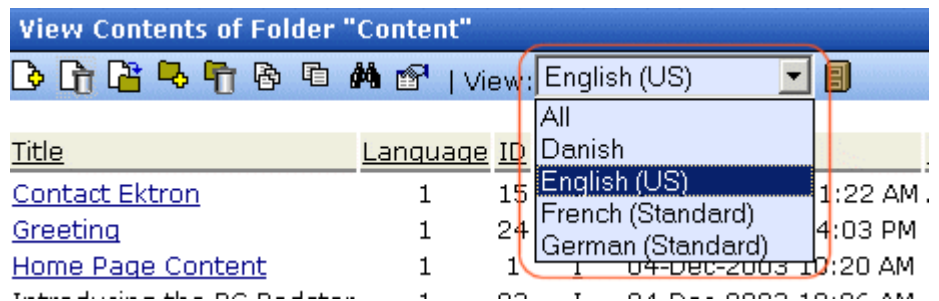
Each folder lists the following information about its content blocks.

Field	Description
Title	The name of the content block.
Language	The language of the content block.
ID	The number assigned to the content block by Ektron CMS400.NET. It is used to retrieve the content block from a database.
Status	The status of the content block. *See Also:* ”Appendix A: Content Statuses” on page 394
Date Modified	The most recent date the content block was added, edited, or published.
Last Editor	The last user who accessed the content block.

Each folder also provides the following toolbar options.

Button	Name	Description	More Information
	Add Content	Opens the editor and creates a new content block in the current folder	"Adding a Content Block" on page 36
	Add Folder	Adds a sub-folder to the current folder	"Adding Sub-Folders" on page 46
	Archived Content	If current content is being displayed, switch to display archived content. If archived content is being displayed, switch to display current content.	"Setting Archive Options" on page 53
	Delete Folder	Deletes the current folder Note: You cannot delete the **Content** folder.	"Deleting Folders" on page 47
	Collections	Adds, edits, or deletes a collection from the current folder	"Working with Collections" on page 120
	Menus	View and work with menus assigned to this content block	"Working with Menus" on page 139
	Search	Look for content in the folder	"Search Content Folder" on page 43
	View Properties	View the folder's properties	

Viewing a Content Block

You can view all content blocks in your Ektron CMS400.NET Web site. Viewing content blocks allows you to view the content, metadata, summaries, and other information. To view a content block in Ektron CMS400.NET, follow these steps.

1. Navigate to the folder that contains the content block, as explained in "Viewing a Folder" on page 30.

2. If your system supports more than one language, you can select an edition of the content block in a particular language via the language dropdown list (illustrated below).

3. Click a content block.

4. The view content screen appears.

After you enter the content, you have the following options.
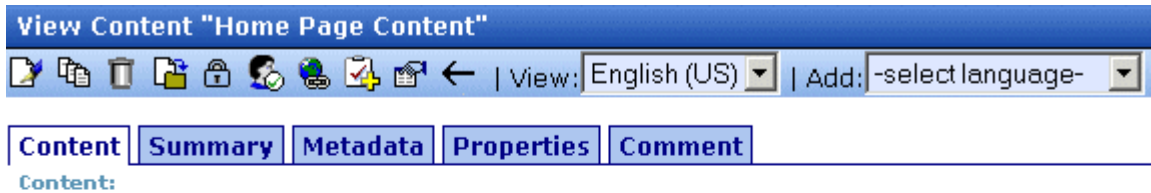
NOTE	Your options may vary according to your permissions and the status of the content block.

Button or Tab	Name	Description	For more information, see
Content	View Content Block	Displays content block	

Button or Tab	Name	Description	For more information, see
Summary	Edit Summary	Edit content block's summary.	"Adding a Content Block Summary" on page 56
Metadata	Edit Metadata	Edit content block's metadata	"Adding or Editing Metadata" on page 60
Properties	Content Properties	View the content block's properties	"Properties" on page 35
Comment	View Comment	View comments on changes made when editing a content block. The history comment also appears on the View Content and Content History screens.	
	Edit Content Block	Open content block for editing	"Editing a Content Block" on page 39
	View History	View all available older versions of the content block; restore older version	"Viewing and Restoring Previous Content Blocks" on page 82
	View Staged	Displays staged content	"Staged Content" on page 401
	View Difference	Compares current version with earlier version of content	"Comparing Versions of a Content Block" on page 75
	Delete	Delete content block	"Deleting a Content Block" on page 41
	Move Content	Move content block to another folder	This button is only available to administrators. To learn more about is, see the **Ektron CMS400.NET** Administrator Manual.
	Check for content linked to this content	Identify all content blocks with quicklinks to this content block	"Checking for Broken Quicklinks" on page 42
	Add Task	Attach a task to a content block	"Task Module Toolbar" on page 214

Button or Tab	Name	Description	For more information, see
🖳	Properties	View and modify these settings • XML Configuration • Content Searchable	• The "Managing XML" chapter of the **Ektron CMS400.NET** Administrator manual • Check this box if the content should be found when someone searches your Web site.
←	Return	Go back to previous menu	
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 to Another Language" on page 40

Properties

The content properties screen contains information about the content block, including.

Field	Description
Content Title	The title assigned to the content block
Content ID	The ID number assigned to the content block. The ID number is used to retrieve content from a database.
Content language	The content block's language
Status	The current status of the content block *See Also:* "Appendix A: Content Statuses" on page 394
Last User to Edit	The last user to edit this content block
Last Edit Date	When the content block was last edited

Field	Description
Start Date	When the content block will go live on the Web site
End Date	When the content will be removed from the Web site
Action on End Date	What happens to the content block when its end date and time are reached. *See Also:* "Setting Archive Options" on page 53
Date Created	When the content block was created
Approval Method	Whether all approvers must sign off on content block before it is published; managed by your system administrator
Approvals	The users in the approval chain for this content block. *See Also:* "Approving/ Declining Content Blocks" on page 64
XML Configuration	The XML Configuration applied to the content block. This is typically managed by your system administrator.
Path	The folder path to the content's folder. A slash (\) represents the Content folder.
Content Searchable	**Yes** appears if the content will be found when someone searches your Web site.

Adding a Content Block

If you have permission to add a content block to a folder, you can create content blocks for that folder. After you create the content block, your system administrator must insert in onto a page on your Web site.

The following flowchart illustrates a typical sequence of events when working with content blocks.
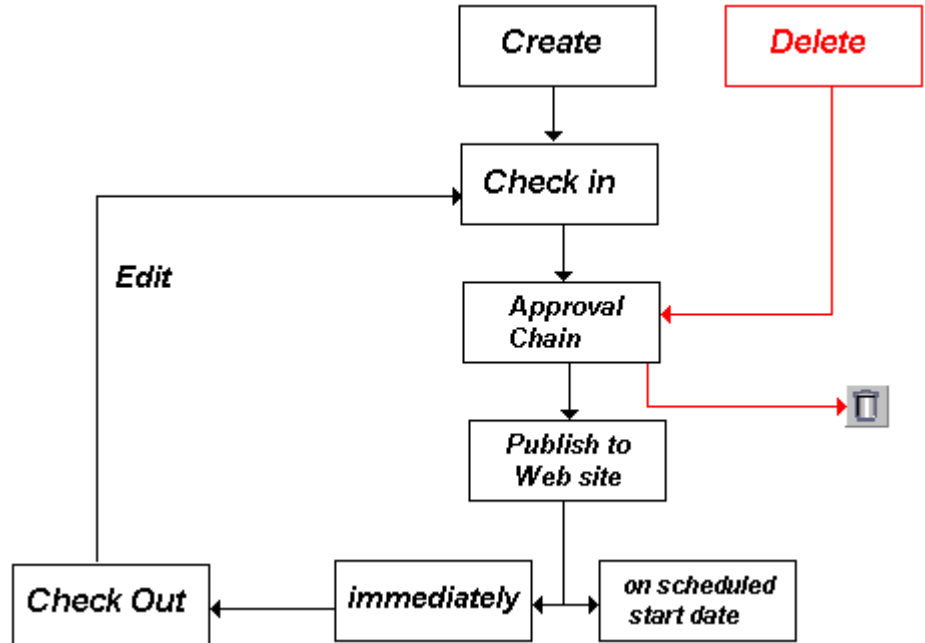
To add a content block, follow these steps.

1. Browse to the folder where you want to create the new content block.

2. Select a language from the language dropdown list.

3. Click the Add button ( ).

4. The Add Content window opens.

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

Responding to the Fields on the Add Content Screen

.

Field	Description
Title	Enter a title for the content block.

Field	Description
Add to Quicklinks Table	Check if you want to save a Quicklink to this content block. "A quicklink is a special kind of hyperlink that jumps to another content block on your Web site. (A regular hyperlink jumps to a Web page on the internet.)"
Content Searchable	Check this box if the content should be found when someone searches your Web site.

6. After you respond to the above fields, the following options are available.

Options on the Add Content Screen

Button or Tab	Name	Description
Content	Add/edit content	Insert content for the content block. For more information about using **Ektron CMS400.NET**'s editor, see "Introduction to eWebEditPro+XML" on page 223.
Summary	Edit Summary	Enter or edit the summary for the content block *See Also:* "Adding a Content Block Summary" on page 56
Metadata	Edit Metadata	Enter or edit this content block's metadata. Note: All required metadata needs to be added before the content block can be submitted into the approval chain. *See Also:* "Adding or Editing Metadata" on page 60
Comment	Add Comment	Briefly describe the content, or comment on changes made when editing a content block. The history comment appears on the View Content and Content History screens.

Button or Tab	Name	Description
Schedule	Add Start and End dates	If you do not want to submit the content block to the approval chain immediately, enter when it will be submitted. *See Also:* "Scheduling Content to Begin and End" on page 49 If appropriate, enter a date when the content will no longer be viewable on the Web site. *See Also:* "Setting an End Date on a Content Block" on page 52
	Submit	Submit the content block into the approval chain. This action also returns the changed content to the database and exits the editor. *See Also:* "Approving/Declining Content Blocks" on page 64
	Publish	Publish the content to the Web site. Note: Only the last approver in the approval chain sees this button. *See Also:* "Approving/Declining Content Blocks" on page 64 This action also returns the changed content to the database and exits the editor.
	Check In	Save and check-in the document. This action returns the changed content to the database and exits the editor. It does *not* submit the content into the approval chain. Rather, it allows you and other users to continue changing it.
	Save	Save the content without leaving the editor. It is a good idea to save your work frequently.
	Cancel	Close the editor without saving changes.

Editing a Content Block

Ektron CMS400.NET content can be in any of several statuses, as described in "Appendix A: Content Statuses" on page 394. You can only edit a content block for which you have permission and in one of the following statuses:

- published
- checked in
- checked out by you

- submitted for your approval

Steps in Editing a Content Block

1. Access the View Content screen for the content block you want to edit, as described in ”Viewing a Content Block” on page 32.

2. Select the language whose content blocks you want to view.

3. Click the Edit button ( ).

4. The editor opens with the content block inserted.

5. From the edit content window, you can:

   - Edit content

   - Create or edit a summary

   - Specify metadata for the content

   - Enter or update a comment

   - Enter or update start and end dates

   - Save changes

   - Check in the content

   - Submit the content for approval

   - Publish a content block to the Web site

   - Access the Library

6. Make the necessary edits to the content block. For a description of the fields on the screen, see ”Responding to the Fields on the Add Content Screen” on page 37

7. Choose a toolbar option or tab from the top of the Edit Content window. These options are described in ”Options on the Add Content Screen” on page 38.

Translating a Content Block to Another Language

Use this procedure when you want to initialize a new foreign language content block with content from a source language. This copying should facilitate the translation.

For example, an editor is translating content from French to German. The editor copies the French 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.

To copy a content block into a new content block of a different language, follow these steps.

1. Go to the View Content screen for the content block you want to translate.

2. From the View drop-down list, select a original language.

3. Click the content block that you want to translate.

4. It appears on the View Content screen.

5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content.
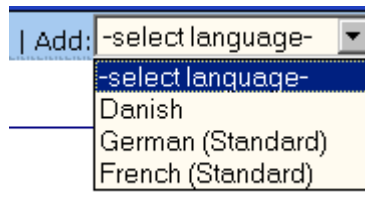
6. The original language content appears. Translate into the new language then delete the original content.

7. When you save the content block, it is saved as the edition of that content block in the selected language.

Deleting a Content Block

NOTE   The ability to delete a content block is a privilege granted by the system administrator. If you do not see a Delete button ( ) on the View Content History screen, you do not have permission to do so.

The Delete command lets you permanently delete obsolete content blocks from your Web site. Like publishing, a deleted

content block must go through the approval chain before it is removed.

You can only delete a content block if its status is Checked In or Approved.

To delete a content block, follow these steps.

1. Access the View Content screen for the content block you want to delete, as described in .

2. Click the Delete button (🗑).

3. The following message appears.
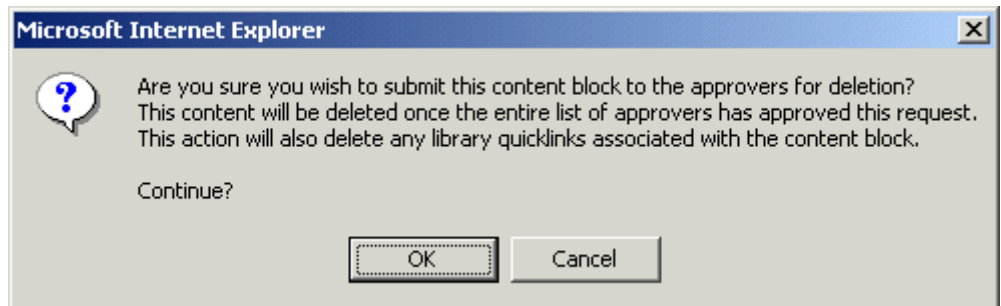
4. Click **OK** to delete the content block.

When the content block goes through the approval chain, it is deleted from **Ektron CMS400.NET**. If you are the last approver in the approval chain, the content block is deleted immediately.

See Also:

Checking for Broken Quicklinks

The Check Links button (🔗) locates all content blocks that include a quicklink to the displayed content block. This feature is useful when deleting a content block, because it informs you of every content block that will include a "dead" link after you delete the selected content. You should then edit those content blocks and remove or change the obsolete quicklinks.

To use the link checker, follow these steps.

1. Access the View Content page for the content block whose links you want check, as described in "Viewing a Content Block" on page 32.

2. Click the Check Links button ( ).

3. A page lists each content block that links to the current content block.

Click the title to access the View Content page for the selected content block. From there, you can remove or change the quicklink.

Search Content Folder

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

Accessing the Search Content Page

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

1. Navigate to any content folder in the Workarea

2. Click the Search button ( ).

3. The Search Content Folder page 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. *See Also:* "Adding or Editing Metadata" on page 60
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 **Search** next to the **Enter keywords** field to begin the search.

6. All results that match the search criteria appear.

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

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

Accessing the Search Content Page

To access the search content page, follow these steps.

1. Navigate to the folder that contains the content you want to find.

NOTE If you are unsure where the content is located, go to the Content folder. From here, you can search all folders on your Web site.

2. Click the Search button (🔍).

3. The Search Content Folder page 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 content blocks titles • **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. *See Also:* "Adding or Editing Metadata" on page 60
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 **Search** next to the **Enter keywords** field to begin the search.

6. All results that match the search criteria appear.

If desired, click a content title to view its properties.

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, follow these steps.

1. Navigate to and click the folder under which you want to create a sub-folder.
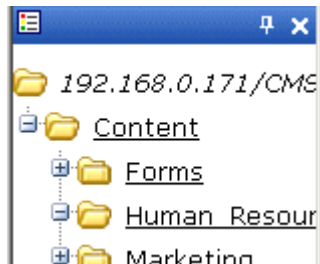
2. The contents of the folder appear in the main section of the Workarea.

3. Click the Add Folder button ( ).

4. The Add Sub-folder screen appears.

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

Field	Description
Folder name	Enter a name for the sub-folder.
Description	Enter a full description of the folder

Field	Description
Style Sheet	Specify the style sheet that the content in the folder will use. If left blank, the folder inherits the style sheet from the parent folder. Your system administrator should be able to assist you in choosing a style sheet.
Template	Specify a default template in which to display the content blocks. The default template is used when quicklinks are generated for the content in the content folder. If left blank, the template from the parent folder is inherited. Your system administrator should be able to assist you in choosing a template.
XML Configuration	By default, content blocks and folders inherit their XML configuration settings from their parent folders. To "break" or restore inheritance, place or remove a check in the checkbox next to **Inherit XML Configuration**. For more information, see the "Managing XML" chapter of the **Ektron CMS400.NET** Administrator's manual.

6. Click the Save button (🖫).

Deleting Folders

You can delete folders that are no longer needed.

NOTE   The ability to delete a folder is a privilege granted by the system administrator. If you do not see a Delete Folder button (🗑) on the View Contents of Folder screen, you do not have permission to do so.

CAUTION!   Deleting a content folder permanently deletes its content blocks, quicklinks and sub-folders.

To delete a content folder, follow these steps.

1. Navigate to the content folder you want to delete.

2. Click the Delete Folder button (🗑).

3. A confirmation message appears.

4. If you are sure you want to delete the content folder, click **OK**.

5. The screen is refreshed, and the folder is deleted.

Scheduling Content to Begin and End

Scheduling content lets you control when a content block becomes visible on the Web site. Similarly, you can remove a content block on a predetermined date and time. When used together, a start and end date can relieve you of much work by managing how long a content block is viewable on your Web site.

You can also set options for what happens to a content block after reaching its end date.

How Does It Work?

When you create a content block or modify an existing one, you can select a "go live" date and time. If you do, and the content makes it through the approval chain, Ektron CMS400.NET publishes the content block to the live site at that time.

For example, your company is having a sale of the century in a month, and everything is ready except the announcement. You decide to update your Web site to let the public know about the sale. With this feature, you create the Web content now and set it to go live a week before the sale.

Setting a Start Date

To set a start date, follow these steps.

1. Access the editor by adding a new content block or editing an existing one.
2. If adding a new content block, enter a title and the content.
3. Click the **Schedule** tab.
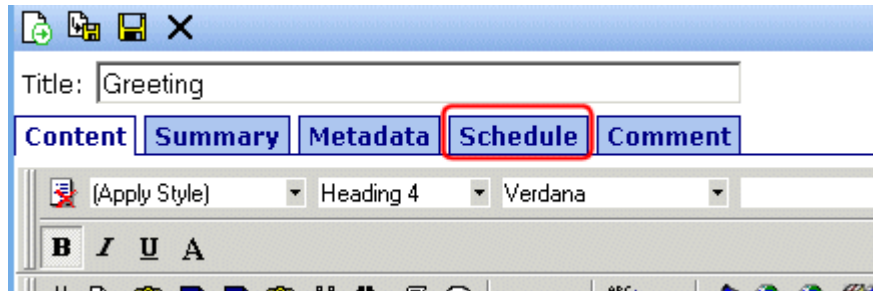
4. Click the calendar button next to the start date field.
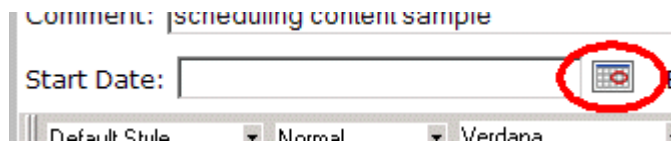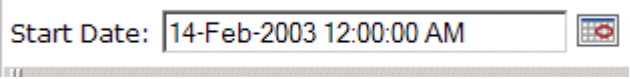
5. The Ektron CMS400.NET calendar pops up.

6. Select the date and time when the content will become visible on the Web site.
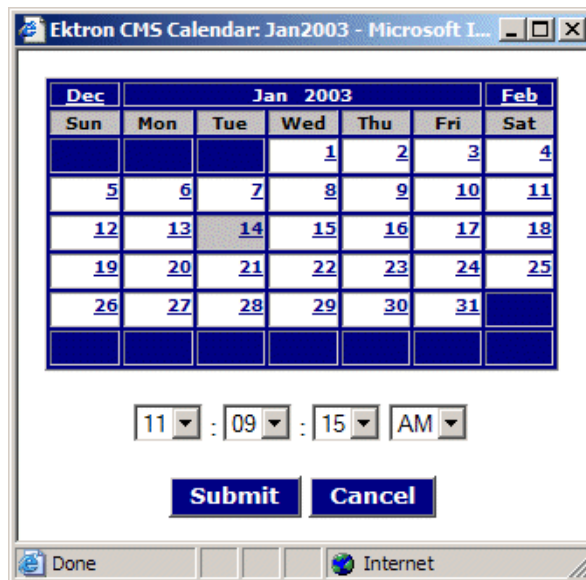
7. Click the **Submit** button.

8. The date and time appear in the **Start Date** field

Start Date: | 14-Feb-2003 12:00:00 AM | 🔳

As an alternative, you can enter the date and time directly, without using the calendar. If you do, use the following format

DD-MMM-YYYY hh:mm:ss tt

NOTE	When you select a time for content to go live, that time depends on the server's system clock. If the clock is incorrect, the content will not go live at the intended time.

What Happens After I Set a Start Date?

After you save the content block, it appears on the Content Pending Start Date report, which helps you keep track of content with a future start date. *See Also:* "Content Pending Start Date Report" on page 99

After you set a go live date and the content completes the approval chain, two scenarios may occur:

• The content block is new

• The content block already exists

Each scenario is now explained.

Setting the Go Live Date on New Content

When you set a go live date on a new content block, the content becomes viewable on the specified date and time as long as it completes the approval chain. If a user accesses the page that contains the content before then, he sees only the template. This occurs within Ektron CMS400.NET and when the content is viewed on the Web site.

Setting the Go Live Date on Existing Content

When you set a go live date for changes made to an existing content block, and it completes the approval chain, the content has a grey border within Ektron CMS400.NET until the date specified.

When you view the content block on the Web site, you see the previously published version. When the go live date occurs, the new content replaces the previously published version, and the content block's status changes to Active.

Setting an End Date on a Content Block

To set an end date for a content block, follow these steps.

1. Access the editor by adding a new content block or editing an existing one.
2. If adding a new content block, enter a title and content.
3. Click the calendar button next to the **End Date** field.
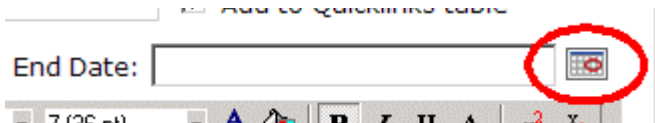
4. A calendar pops up.
5. Select the date and time you want the content to be removed from the Web site.
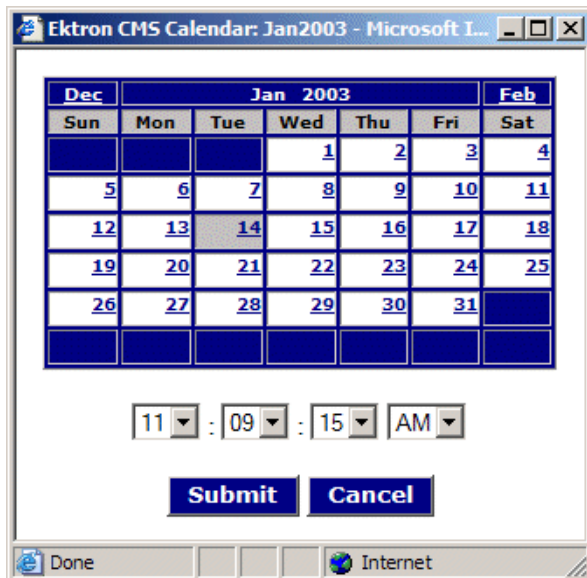
6. Click the **Submit** button.
7. The date and time appear in the **End Date** field
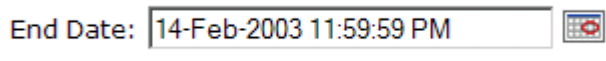
NOTE   You can also enter the date and time without using the calendar. If you do, use the following format: DD-MMM-YYYY hh:mm:ss tt

NOTE   When you select a time for content to go live, that time depends on the server's system clock. If the clock is incorrect, the content will not be removed at the intended time.

What Happens After I Set an End Date?

If you set an end date to a content block, and it gets published to your Web site, the content is visible on the Web site. When a content block reaches its end date, you have three choices for what to do with it. These are explained in "Setting Archive Options" on page 53.

If your choice means the content will not appear on the Web site, Ektron recommends having another content block ready to replace it. If not, and a site visitor goes to the page containing the content, he sees the template without the content block.

Appearance on Content Reports

After a content block reaches its end date, it appears on the Expired Content report, which helps you keep track of expired content. *See Also:* "Expired Content Report" on page 101

Also, the Content to Expire report lists all content blocks whose end date will occur within a number of days that you specify. *See Also:* "Content to Expire Report" on page 101

Setting Archive Options

After setting an End Date, you can specify a content block's archive options, which determine how it is handled upon reaching the end date/time.

To be eligible for any option, the content must reach its end date/time, progress through its approval chain, and be published. Until those events occur, the content block remains visible both within its content folder and on the site.

The archive options (illustrated below) appear below the **Start Date** and **End Date** fields on the content block's **Schedule** screen.

Action on End Date:

- ◉ Archive and remove from site (expire)
- ○ Archive and remain on site
- ○ Add to the CMS Refresh Report

Each option is explained below.

Archive Options

Option	Can site visitors view content upon expiration?	Can users view and edit content within Ektron CMS400.NET upon expiration?
Archive and remove from site (expire)	No	Yes, within its folder by clicking the archive button (▤)
Archive and remain on Site	Yes The content will not appear on a page that uses the ListSummary function but will appear wherever the ArchiveListSummary function is used.	Yes, within its folder by clicking the archive button (▤)
Add to CMS Refresh Report	Yes	Yes, in its content folder and on the Refresh Report. *See Also:* "Refresh Reminder Report" on page 100

Restoring Content from Archived to Active State

To restore a content block from archived state to active, follow these steps.

1. Navigate to its folder.
2. If necessary, click the Archive button to view it. (See "Archive Options" on page 54).
3. Click the Edit button ( ).

4. Click the **Schedule** tab.

5. Remove the **End Date** or change it to a future date.

6. Submit the content for publishing. When the content block is published, it will no longer be archived.

Adding a Content Block Summary

A summary provides a short description of a content block to supplement the title when displaying a list of content blocks on a Web page. When you create or edit a content block, you can create a summary. Then, your Web site developer can create Web pages that contain just the summaries to attract readers to the full story.

A good example is a news Web site. A page on that site could list the titles of the top stories followed by a summary of each (illustrated below).

> **TOP STORIES**
> [Ektron Named a Rising Star (08-15-2003)](#)
> **August 15, 2003, Amherst, New Hampshire, USA —**
> `Ektron, Inc., an innovator in Web content`
> `management and authoring, has been named`
> `a Rising Star as part of the prestigious`
> `New England Technology Fast 50 Program.`
>
> [*Ektron Launches International Distribution Program (08-08-2003)*](#)
> **August 8, 2003, Amherst, New Hampshire, USA —**
> `Ektron, Inc., an innovator in dynamic Web`
> `content authoring and management with`
> `over 350,000 users, today announced the`
> `launch of its international distribution`
> `program.`

Like content blocks, summaries can include images and files as well as different font styles and sizes. This chapter explains how to create summaries and how they can help navigation within your site. Your system administrator determines how to display the summaries on your site.

Creating Summaries

There are two ways to create summaries:

- for a new content block (see "Creating a Summary on a New Content Block" on page 57)

- for an existing content (see "Creating a Summary for an Existing Content Block" on page 58)

Creating a Summary on a New Content Block

1. Navigate to the folder in which you want to create the content.

2. Click the Add Content button. The Add Content screen appears.

3. Insert a **Title** and content. *See Also:* "Adding a Content Block" on page 36

4. Click the **Summary** tab.

5. Enter summary information for the content block. The summary can include images, files, and hyperlinks. Its length can be restricted by your system administrator in the configuration setup screen.

---

6. When done, click the appropriate button.

Creating a Summary for an Existing Content Block

1. Navigate to the folder that contains the content.

2. Click the content block.

3. The View Content screen appears.

4. Click the **Summary** tab to enter or edit summary information for the content block. The summary can include images, files, and hyperlinks. Its length can be restricted by your system administrator in the configuration setup screen.

5. When done, click the Save button (🖫).

6. The View Content page reappears. The status of the content block changes to "checked out" to you.

NOTE   When you enter or edit an existing content block's summary, its status changes to checked out. After you create the summary, click the Check-In button to check the content block in. From that point, you need to submit or publish it.

Editing a Summary

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

To edit the a content block's summary, follow these steps.

1. Access the View Content page for the content block whose summary you want to edit, as described in "Viewing a Content Block" on page 32.

2. Click the **Summary** tab.

3. The Edit Summary window opens.

4. Click the Edit button. The summary opens within the editor.

5. Make the necessary changes.

6. Click the Save button ( ).

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

NOTE	When you edit an existing content block's summary, it goes into a checked out state. After creating the summary, check the content block back in. From that point, you must submit it or publish it.

Adding or Editing Metadata

What is Metadata?

After you create or update a content block, it is typically published to the World Wide Web (WWW). Since the Web has millions of pages, Metadata makes it easier for people to find your content.

Programs that search the Web (such as Google) look at a page's title and metadata keywords to determine if they should return your Web page with their results.

To improve search program results, **Ektron CMS400.NET** provides two fields within the Metadata feature.

- **Metadata Title** - appears on the search results screen to further define your Web page
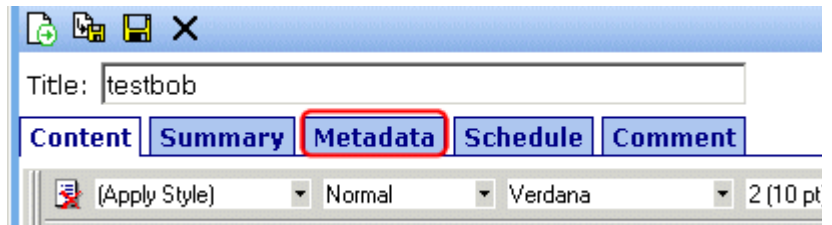
- **Metadata Keywords** - are searched by leading search programs, along with the page's title

Entering or Editing Metadata

To enter or edit a content block's metadata, follow these steps.

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

1. Access the View Content screen for the content block whose metadata you want to enter or edit, as described in "Viewing a Content Block" on page 32.
2. Click the **Metadata** tab.
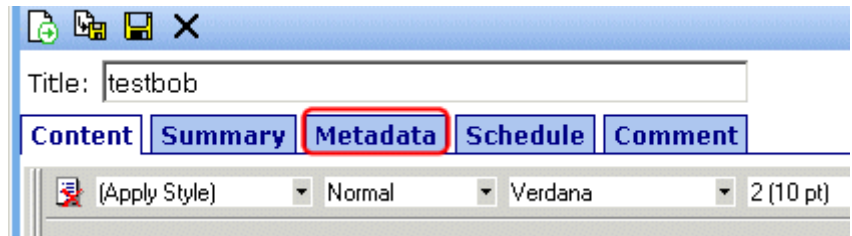
3. The Edit Metadata screen opens with the current metadata displayed. In order to add metadata to a content block, an administrator *must* have created a definition for it in the language of the content block.

Content Title: Home Page Content
* = Required fields

Title: (500 max.)   Separator Charact

Welcome to RC International

[Default]

Keywords: (500 max.)   Separator Charact

Car Plane Boat	[>>] [All >>] [<<] [All <<]	RC International RC racing remote control airplanes cars

4. Edit the metadata. Note that

- Required fields are marked with an asterisk (*). Someone must place at least one response in such fields before the content block can be submitted into the approval chain.

- Your system administrator may prevent you from editing a field. In this case, the field has a gray background, and you cannot place the cursor there.

- Fields may appear in two columns, as illustrated in the **Keywords** field on the above screen. In this case, the system administrator provides a list of terms that you can apply to the content block. You can only select terms from the list -- you cannot enter free text.

  One column is labeled **Not Included** and the other **Included**. Move terms between lists by clicking the arrow (**>>** and **<<**). Or, move all terms between lists by clicking **All >>**.

- In the **Keywords** field, you may see a semi-colon (;) as a separator character. Use the separator character to separate items in a field.

- If default metadata was defined for a specific metadata type, you can click the **Default** button at the bottom of each field to restore it.

- Below each field is a **Characters Left** field, which counts the number of metadata characters. You cannot exceed the maximum (500 characters) when entering metadata information.

5. Click the Save button (🖫).

6. The View Content screen reappears.

The content block is now in a checked out state to you. For the changes to take effect on the Web site, check in the content and submit it into the approval chain. *See Also:* "Approving/Declining Content Blocks" on page 64

Viewing Metadata on a Pages' Source

After a content block is published to the Web site, you can view the page source to see its metadata. Below is the source of a sample Web page.
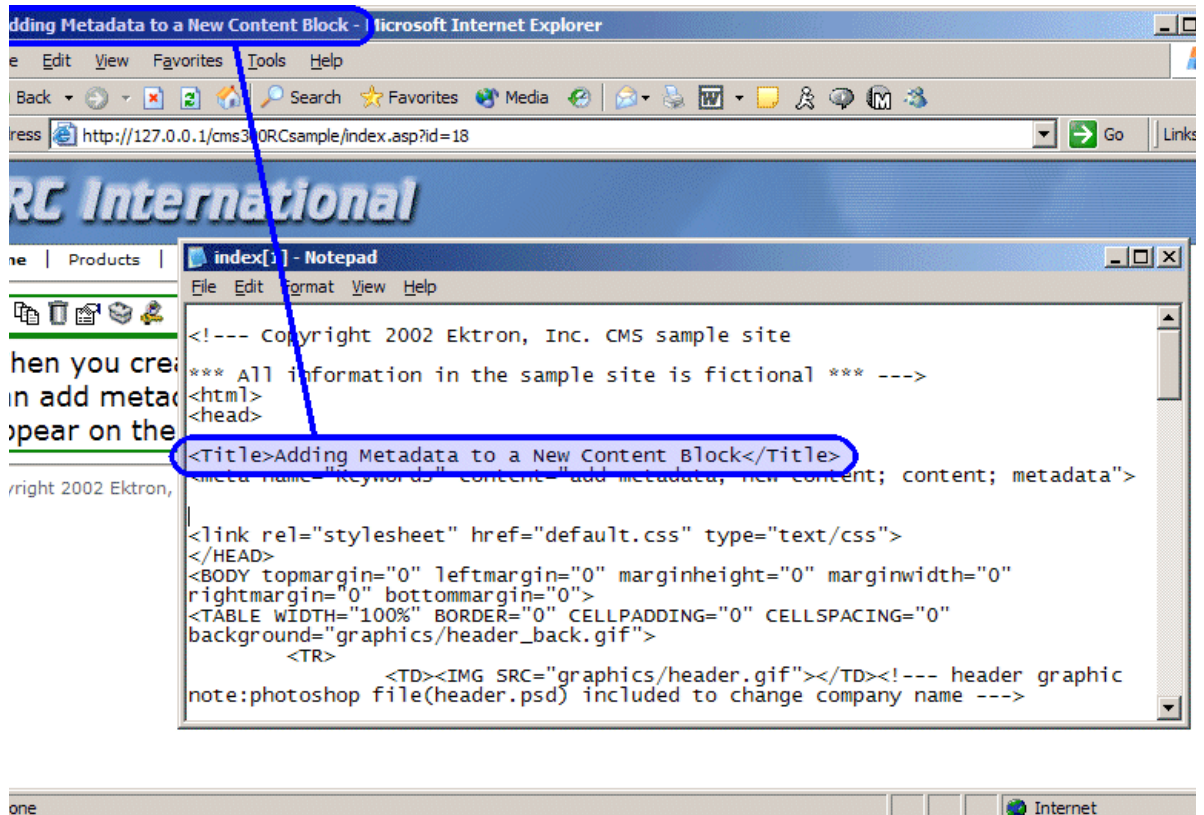
On this Web page, notice the keywords are included in the meta tag, and the title is in HTML tags. These appear according to how the administrator sets up the metadata definitions.

Approving/Declining Content Blocks

Your site administrator establishes an *approval chain* for each folder, or even specific content blocks. The approval chain is a list of people or groups who must approve a new or edited content block before it is published to the Web site. If a user group is part of an approval chain, any member of the group can approve the content.

The administrator also determines the sequence of approvers in the chain.

When a new or edited content block is submitted to the approval chain, it is reviewed by users who may

- change it
- approve or decline it
- publish it to the Internet (it is published when the last user approves it)

The chart below illustrates the approval process.
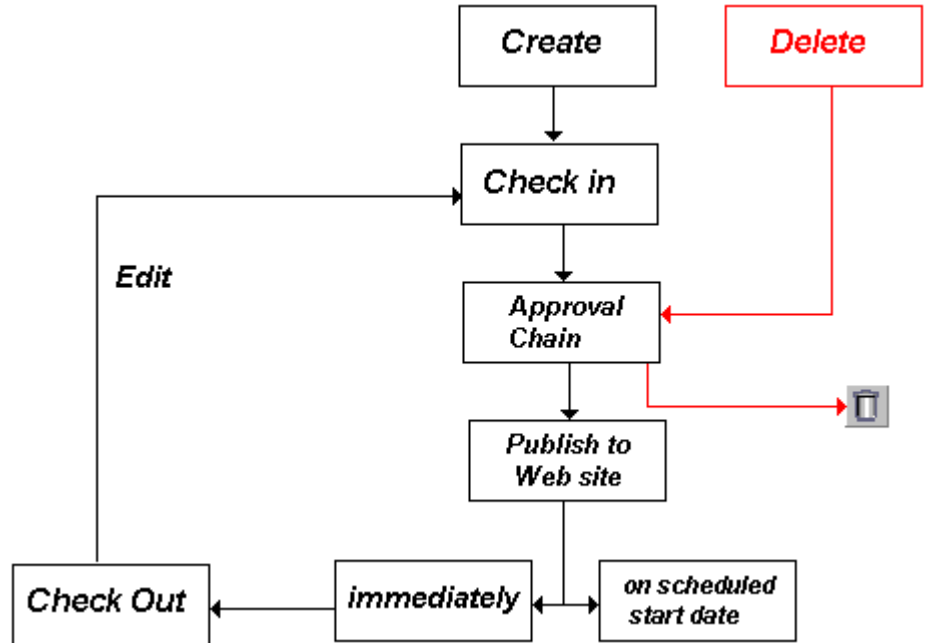
You can approve and decline all content blocks that have been submitted to you from the approval folder. The steps below guide you through the approval or decline of these content blocks.

Approve/Decline One Content Block

1. Click the Smart Desktop button (circled in red below).
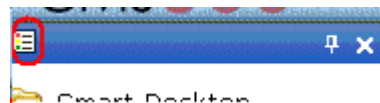
2. Click **Reports**.
3. Click **Approvals**.

4. Click the content block you want to approve or decline.

To select all displayed content blocks, click **Select All** at the top of the screen.
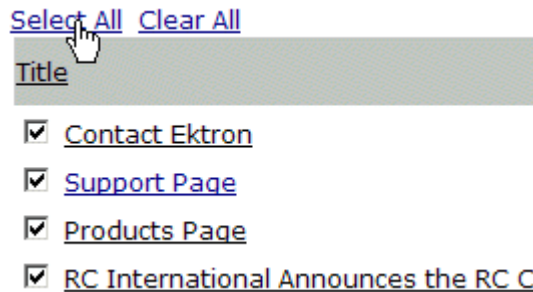
5. The content block appears. You can view the content, summary, metadata, etc.

A toolbar at the top of the screen lists tasks you can perform on the content.

Button	Name	Result of Clicking
	Publish	Accept changes to the content block and publish it to the site.
		Note: If there is another approver in the approval chain for the content, this is replaced by a **SUBMIT** button.
	Decline	Reject changes and keep current version of content block live on the Web site.
	Edit	Check out content block and change it if desired.
	View Published/ Staged	Toggle between the currently published version of content block and submitted version. This can help you compare versions. *See Also:* "Staged Content" on page 401

Button	Name	Result of Clicking
	View Diff	View differences between the version awaiting approval and the currently published content block. *See Also:* "Comparing Versions of a Content Block" on page 75
←	Back	Return to previous screen.

Approve/Decline Several Content Blocks

To approve several submitted content blocks without reviewing them, follow these steps.

1. Select the submitted content blocks you want to approve, as described in "Approve/Decline One Content Block" on page 65.

2. Click the Approve All button ( ).

3. The following message appears.
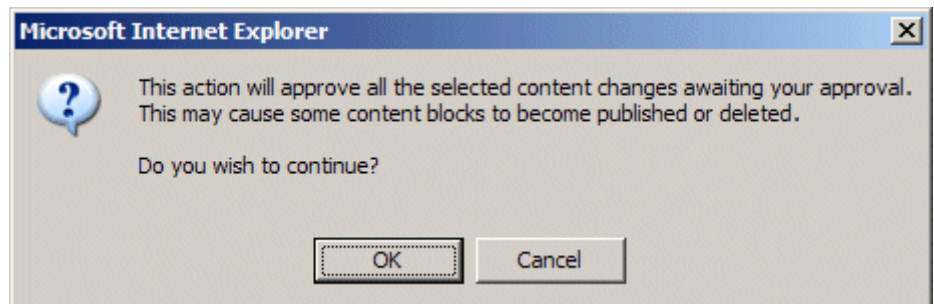
4. To continue, click **OK**.

5. The approved content blocks are either submitted to the next publisher, published immediately to the Web site, or deleted, depending on the approval chain set for each content block.

Example of an Approval Chain

The approval chain begins when a content contributor submits a new or edited content block. If e-mail is enabled, an e-mail is sent to the next approver in the approval chain.

The following example follows a typical content block from creation to publication. Three users make up this approval chain.

- Sports Writer - creates sports content
- Sports Editor - edits and publishes all sports articles
- Editor In Chief - edits and publishes all articles

Each user has different permissions that correspond to their roles.

Creating a Content Block

The first step is to create a content block. To create a new content block:

1. Log in to Ektron CMS400.NET as a SportsWriter.
2. Create a content block as described in "Adding a Content Block" on page 36.
3. Click the Submit button ( ) at the top of the window.
4. The content block is in the approval chain. The first user in the chain receives an email saying the content block is ready for approval.
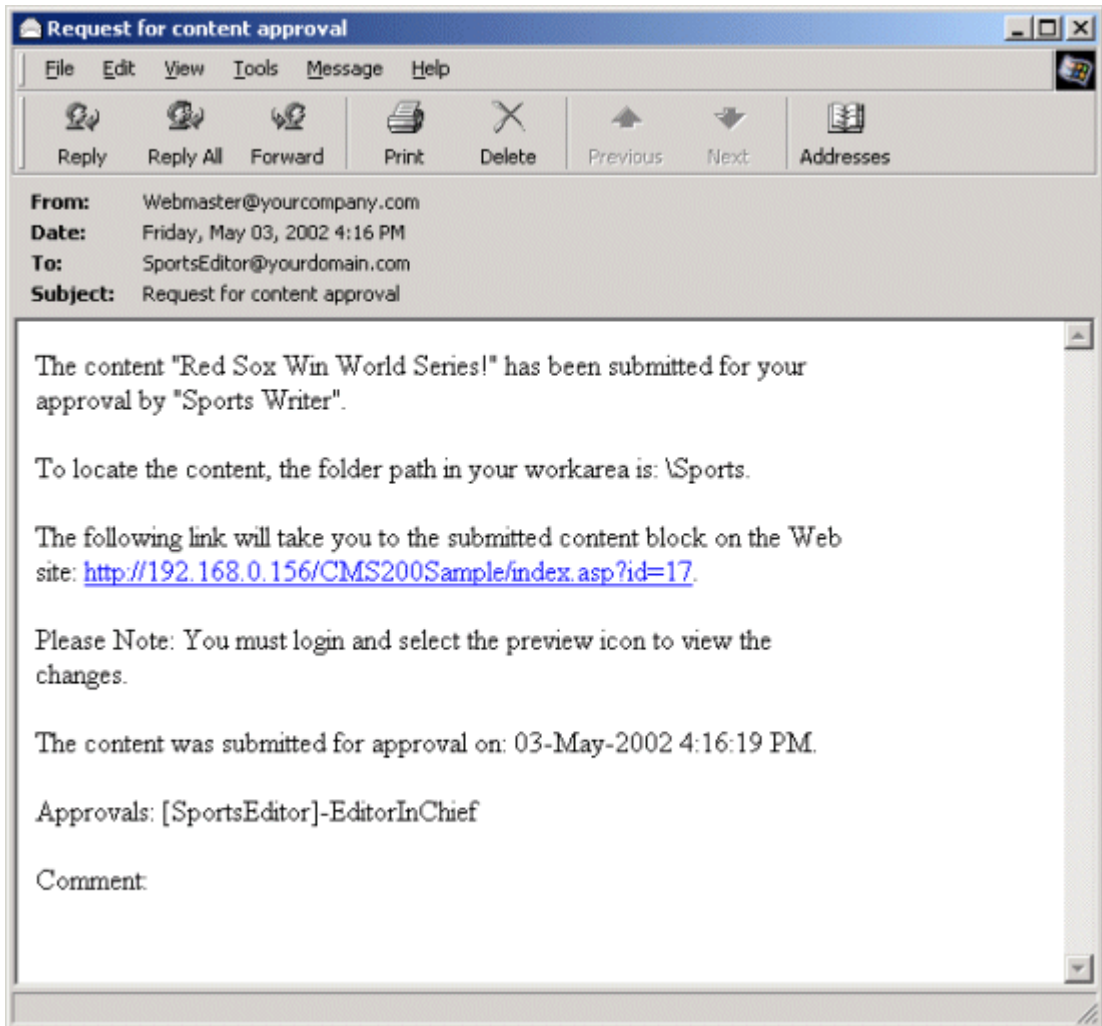
NOTE   Emails are only sent if your Administrator enables them.

The content contributor, Sports Writer, has completed his role in the approval chain but continues to receive emails notifying him of changes in the content block's status.

First Approver

After Sports Writer submits the content block, the first user in the approval chain, Sports Editor, receives an email stating that a content block needs his approval. He can change and approve the content block or decline it.

Sports Editor logs into Ektron CMS400.NET, navigates to his desktop, where he sees a link **Content Awaiting Approval**.
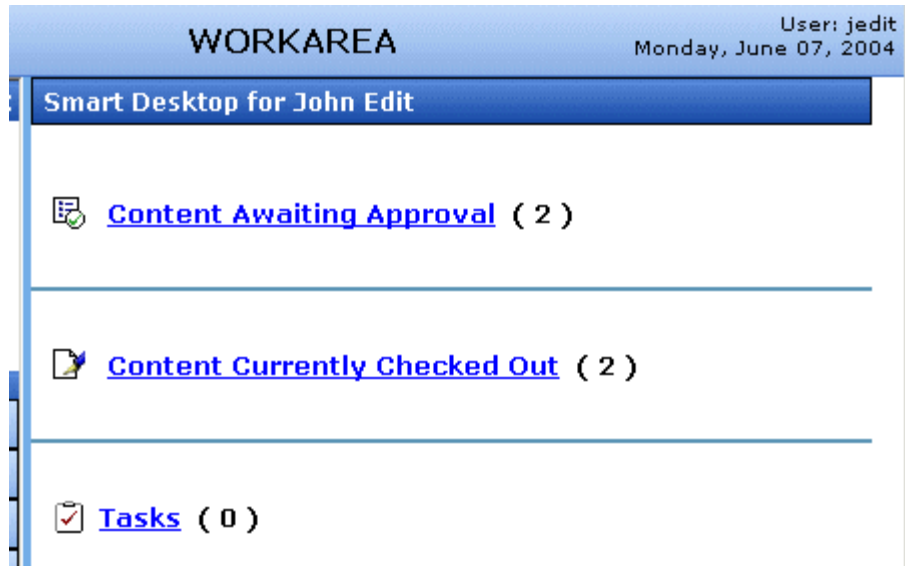
He clicks the link and sees all content blocks awaiting his approval.

The approvals folder window displays information such as title, who submitted it, go live date, etc. The Sports editor clicks the submitted content block.
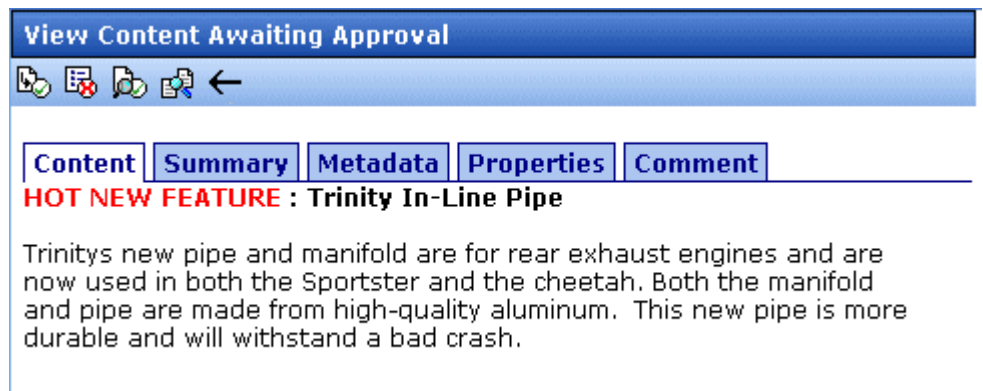
The View Content Awaiting Approvals window appears listing all information necessary to decide whether to approve or decline the content block.

At the approval window, the Sports Editor has several options.

Button	Result
Approve 🖳	Send content to next approver in approval chain.
Decline 🖳	1. Send email to creator, notifying him/her that content was declined. 2. Remove content from approval chain.
Edit 📝	Invokes the editor. The approver can make changes to content block.

For demonstration purposes, we'll choose **Approve**.

Second Approver

After the content block is approved, the next approver in the approval chain receives an email saying that the content block is ready for approval.
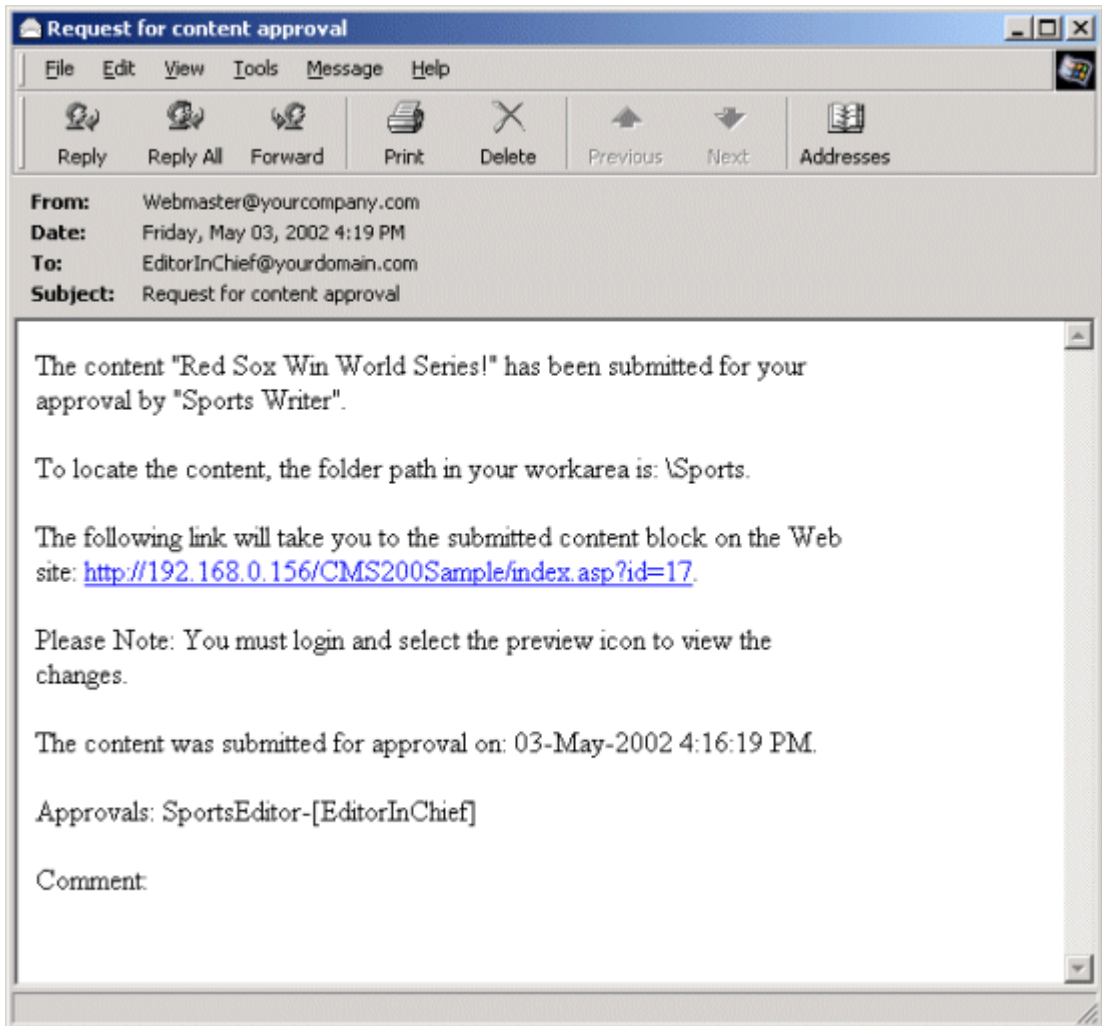
EditorInChief logs in to Ektron CMS400.NET and accesses his Workarea. The Workarea has an Approval folder with the content awaiting his approval. EditorInChief navigates through the Approval folder until he finds the content block **Red Sox win World Series**.

From this window, EditorInChief can view information about the content block, including title, go live date, user who created it, etc. He then clicks the content he wants to approve.

View Content Awaiting Approval

| Content | Summary | Metadata | **Properties** | Comment |

Content Title:	Red Sox win World Series
Content ID:	32
Status:	Submitted for Approval(s)
Submitted by:	Sports Writer
Last Edit Date:	07-Jun-2004 10:37 AM
Start Date:	[None Specified]
End Date:	[None Specified]
Date Created:	07-Jun-2004 10:37 AM
Approvals:	EditorInChief SportsEditor
History Comment:	

Metadata:

Title:

Keywords:

Summary:

This window is similar to the previous approver's but includes a Publish button at the top of the screen. The EditorInChief has a publish button (instead of a submit button) because he is the last approver in the approval chain. When he approves the content block, it is published to the Web site.

Like the Sports editor, the EditorInChief has the following options.

Button	Description
Approve	Sends the content to the next approver in the approval chain.
Decline	1. Sends an email to the creator, notifying him/her that the content was declined. 2. Removes the content from the approval chain.

Button	Description
Edit ![edit icon]	Invokes the editor. The approver can make changes to the content block.

After reviewing the content, the EditorInChief decides it is great and publishes it. At this point, the content block becomes live on the Web site, and the approval chain is complete.

The user who created the content block receives an email notifying him that it was published.
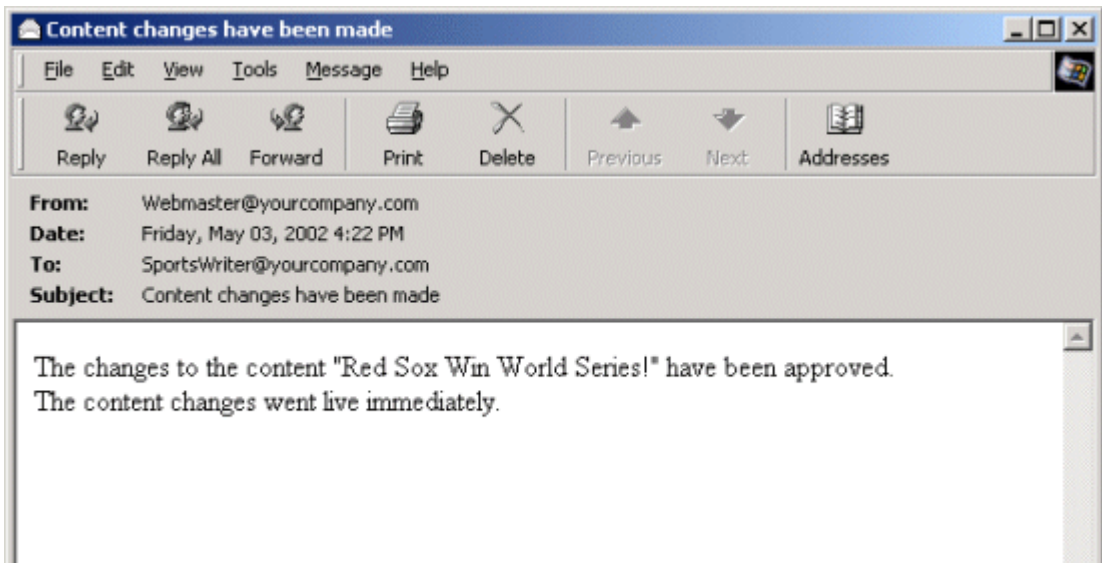
Comparing Versions of a Content Block

The View Content Difference feature highlights changes that were made to a selected content block. Below is an example of the View Content Difference screen, showing two versions of a content block. The changes are indicated by

- redlining deleted content
- highlighting in yellow added content
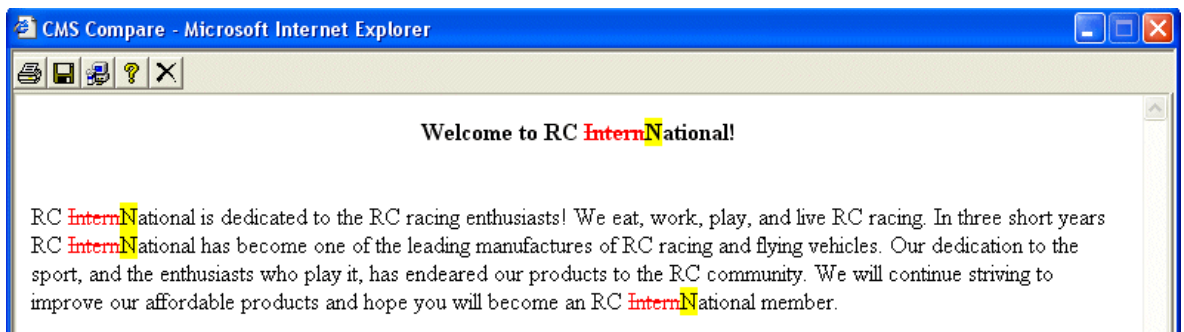
Within the View Content Difference feature, you can perform several tasks, as well as view different versions of the content separately, or compared.

When Can I Compare Content?

The View Content Difference feature is only available when

- you are viewing an historical version of a content block
- a staged version of the content is available (*See Also:* "Staged Content" on page 401)

The following table explains when you can use the feature, and which versions are compared.

Content Block Status	Compares current published version with
Published	Historical version stored in the content history area
Checked-In	Most recently checked-in version
Submitted	Submitted version
Pending Start Date	Scheduled version pending start date
Checked Out	Not available

If a content block can be compared with another version, the View Difference button (🖻) appears in the content history area or the Web page view.

The Compare Content Window

NOTE The first time the View Content Difference feature is opened, a simple installation program runs. *See Also:* "First Use of the View Content Difference Feature" on page 81.

The Compare Content window consists of the following:

- Toolbar
- Content area

- View content tabs
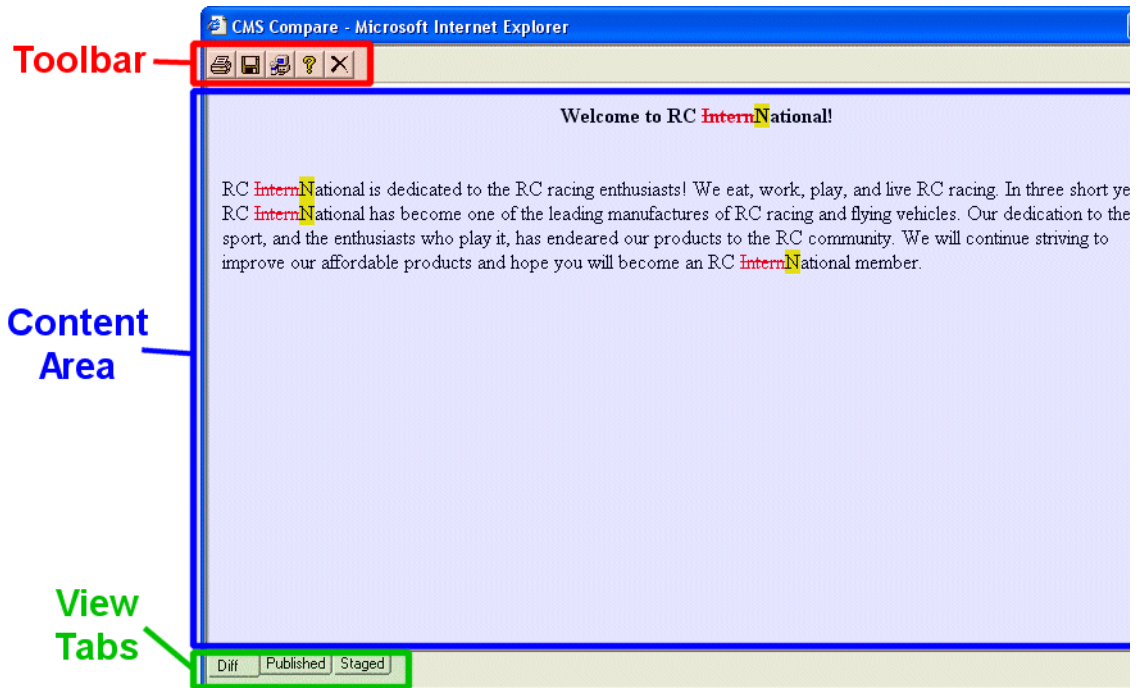
Each area is explained below.

Toolbar

The content comparison toolbar has five buttons, explained below.

Button	Name	Description
🖨	Print	Sends content to local or network printer.
		Note: This option prints the currently displayed content, whether it is the compared, published, or staged content.
💾	Save	Saves a copy in HTML format on your local machine or network. When saved as a physical file, the HTML may be edited. However, the changes are not saved to the Web Server.
		The save option saves the version of the content you are viewing.

Button	Name	Description
	Setup	Opens setup dialog box to configure the settings. Typically, only an administrator would use this. For more information, see "Setup" on page 78.
	Help	Displays additional information about the compare feature.
	Exit	Closes the window.

Setup

Click the **Setup** button ( ) to open the setup dialog box. Typically, a system administrator would edit these settings.
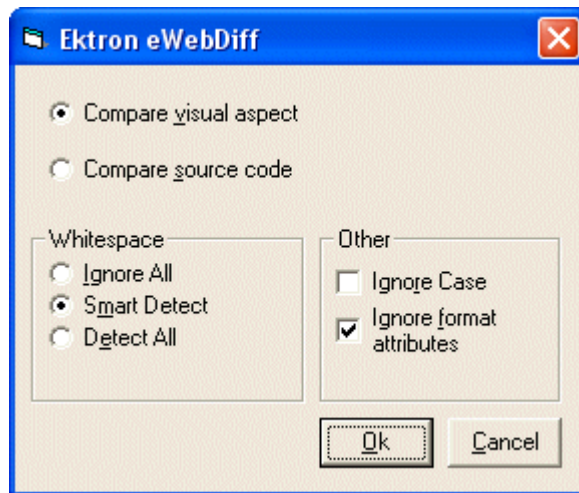
You can change the setup options to better suit your needs. The following table explains each option.

Option	Description
Compare Options	
Compare visual aspect	Compares content as it would appear on a Web page.

Option	Description
Compare source code	Displays compared content as source HTML.
Whitespace Options	
Ignore All	Blank (whitespace) characters are ignored.
Smart Detect	One or more consecutive whitespace characters are treated as a single separation sequence. That is, multiple whitespace characters are ignored.
Detect All	Blank (whitespace) characters are treated as any other character.
Other Options	
Ignore Case	Determines whether comparison is case sensitive. For example, if you check this box, the strings "Bob" and "BOB" are not highlighted because their only difference is the case of the characters.
Ignore Format Attributes	Determines whether comparison ignores changes in text-formatting attributes (HTML Visual Analysis only).

After updating setup information, click **OK** to save changes.

Content Area

The content area displays the content comparison.
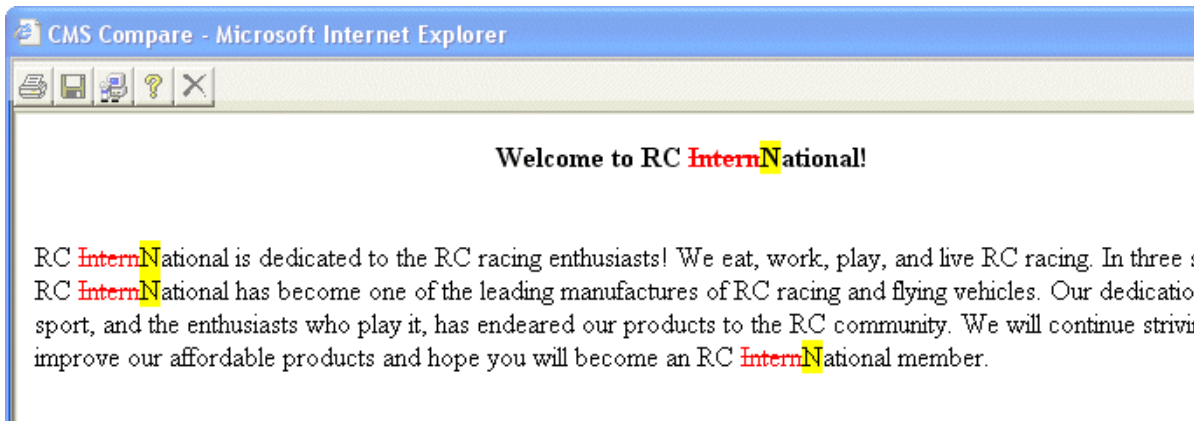
The following table describes the change indicators.

Symbol	Example	Content state
Plain black text	Trinitys new pipe and	Unchanged
Yellow highlighted text	Our dedication to the	Added
Red, struck-through text	dedicated to the RC	Deleted

View Tabs

When viewing content in the View Content Difference feature, there are three view modes, explained below.

View	Description
Diff	Compares published version of content to staged version
Published	Displays currently published version
Staged	Displays the staged version of content. *See Also:* "Staged Content" on page 401

To switch between views, click the corresponding View tab.

First Use of the View Content Difference Feature

The first time the View Content Difference screen is used on a client machine, a simple installation program is performed.

Click **YES** when the following screen appears.
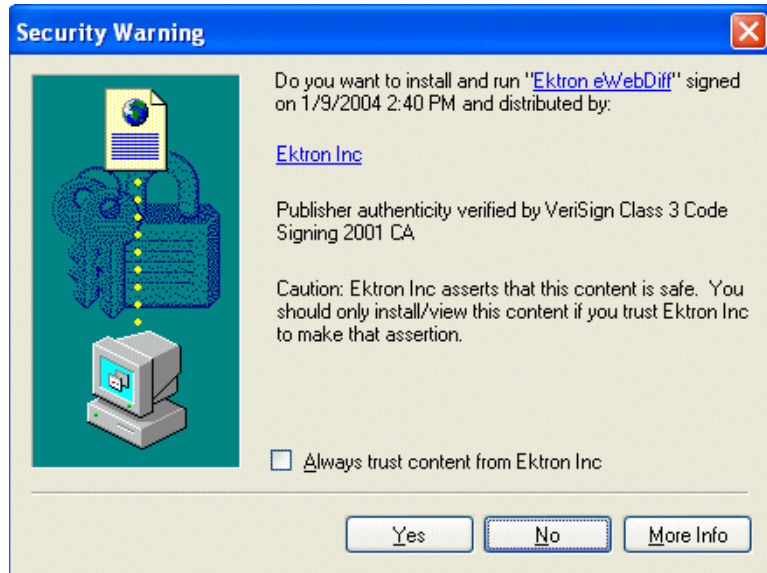
When the installation program completes, close and reopen the View Content Difference feature.

Viewing and Restoring Previous Content Blocks

Past versions of published content blocks are available unless your system administrator has purged them. Your ability to view a content block's history is determined by your user privileges.

NOTE This section explains how to view and possibly restore older versions of a content block. To see a change-by-change comparison of two content blocks, use the View Content Difference feature, explained in "Comparing Versions of a Content Block" on page 75.

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:* Ektron CMS400.NET Administrator manual > "Managing Content Folders" > "Folder Properties" >"Purge History"

Accessing Content History

By default, all users can view the history of an **Ektron CMS400.NET** content block. You can access content history from two places:

- The View Content page in the Workarea
- The icon menu for a content block on a Web page

Once you access the content history, the functionality is identical.

The following sections explains how to access the content history from both places.

Accessing the Content History from the Workarea

To access the content history from the Workarea, follow these steps.

---

1. Navigate to the View Content page for the content block whose history you want to view.

2. Click the View History button ( ).

Accessing the Content History from a Web page

To access the view history for a content block from a Web page, follow these steps.

1. Browse to the content block whose history you want to view.

2. Click the View History button ( ).

3. The Content History window opens.

The Content History Window

This Content History window has two sides:

- The left side, the *Document History* area, displays all versions of the content block. Each version is identified by the date when it was published or checked in.

  Some versions display a green circle.

  A circle indicates a version that was *published*. On dates without a green circle, the content was checked-in but not published.

- The right side has information about the selected version of the content block.

Viewing a Historical Version of a Content Block

1. Click a date from the left frame

2. Information about that version of the content block appears on the right.

View Content History "Home Page Content"

Content Title:	Home Page Content
Content ID:	1
Content Status	**Published**
Last User To Edit:	Application Administrator
Last Edit Date:	01-Dec-2003 11:12 AM
Start Date:	[None Specified]
End Date:	[None Specified]
Date Created:	21-Feb-2001 05:46 PM
Published Date:	**01-Dec-2003 11:12 AM**
History Comment:	This is what the user will see when they visit our sample site
Approver List	**admin**

Published Date

- 01-Dec-2003 11:15 AM
- 01-Dec-2003 11:15 AM
- 01-Dec-2003 11:12 AM
- 01-Dec-2003 11:12 AM
- 01-Dec-2003 11:01 AM
- 01-Dec-2003 11:01 AM
- 26-Nov-2003 02:15 PM
- 26-Nov-2003 02:15 PM
- 26-Nov-2003 02:14 PM
- 26-Nov-2003 02:14 PM
- 26-Nov-2003 02:14 PM
- 26-Nov-2003 02:14 PM
- 26-Nov-2003 02:13 PM
- 26-Nov-2003 02:13 PM

Metadata:
Title:
Welcome to RC International
Keywords:
RC International; RC; racing; remote control; airplanes; cars

Summary:
Welcome to RC International.

Content:

Welcome to RC International!

When viewing a historical version of a content block, you can perform three actions.

Action	Button	Description	More Information
Restore		Restore historical version of content block	"Restoring a Previous Version" on page 87
Compare		Compare historical version of content block to current version	"Comparing Historical Versions" on page 87
Remove XSLT *XML Content Only*		Remove XSLT applied to XML content block	"Removing Applied XSLT" on page 87

Each task is explained below.

Restoring a Previous Version

1. Select an historical version of the content that you want to restore, as described in "Viewing a Historical Version of a Content Block" on page 85.

2. Click the Restore button (⬚).

3. The content history window closes, and you return to the View Content page or the Web page, with the content in a checked in status.

4. If desired, check out the content to make additional changes.

5. Select the workflow to perform on the content block.

6. When the historical version is placed in the approval chain and approved, it is published to the Web site.

Comparing Historical Versions

After you select an historical version of a content block, you can view the differences between it and the current version. To compare a historical version, follow these steps.

1. Select an historical version of content, as described in "Viewing a Historical Version of a Content Block" on page 85.

2. Click the View Differences button (⬚).

   The historical and the current versions are compared. To learn more about the comparison, see "Comparing Versions of a Content Block" on page 75.

Removing Applied XSLT

You can only remove an applied XSLT when viewing historical versions of an XML content block. If you remove the applied XSLT, you can view the content without the irrelevant XML tags.

The following table compares the views.

With XSLT	**Product Name:** RC Redstar **Description:** The RC Redstar is a radio controlled, gas powered, low-wing aircraft. This new plane is for beginners-intermediates that are looking for a easy plane to learn with or to have fun with. The Redstar is easy to fly and easy to maintain. **Specifications** Airfoil: Low-Wing Overall Length: 57 in. Wingspan: 71 in. Weight: 7-8 lbs. Engine Size: .60-.70 cc Fuel Tank Size: 12 oz. Engine Run Time: 15 min (full tank) Refill Time: 17 secs. Fuel Type: Standard White (highly refined) gasoline Color: Standard
Without XSLT	**Content:** RC Redstar The RC Redstar is a radio controlled, gas powered, low-wing aircraft. This new plane is fo beginners-intermediates that are looking for a easy plane to learn with or to have fun wi Redstar is easy to fly and easy to maintain. Low-Wing 57 in. 71 in. 7-8 lbs. .60-.70 cc 1 15 min (full tank) 17 se Standard White (highly refined) gasoline Standard

Content Workflow Reports

The reports folder contains several reports to help you manage the workflow of content blocks through **Ektron CMS400.NET**. In most cases, you choose a report that corresponds to a content block status, then view all content blocks in that status. If appropriate, you can perform tasks on selected content blocks. For example, you can check in checked out content blocks.

This chapter explains how to access the reports folder in your Workarea, what information is on the reports, and actions you can perform on the content blocks that appear on the reports.

Accessing the Reports Folder

To access the Reports folder, follow these steps.

1. Log in to your Ektron CMS400.NET Web site and access the Workarea.

2. Access the Smart Desktop (see "Accessing the Workarea" on page 13). Click the **Reports** folder.

3. A list of available reports appears.

mart Desktop

  Tasks

  Reports

    Approvals

    Checked In Content Rep

    Checked Out Content Re

    New Content Report

    Submitted Content Repo

    Content Pending Start D

    Refresh Reminder

    Expired Content Report

    Content To Expire

NOTE   The Approvals and Checked Out Reports are also available from the Workarea.

The reports are described below.

Report	Displays content blocks in this status	For more information, see
Approvals	Requiring your approval	”Approvals Reports” on page 94
Checked In Content	Checked in	”Checked In Report” on page 96
Checked Out Content	Checked out	”Checked Out Report” on page 97
New Content	New (that is, created and saved but never published)	”New Content Report” on page 97
Submitted Content	Submitted for publication	”Submitted Report” on page 98
Pending Content	Approved and pending a start date	”Content Pending Start Date Report” on page 99
Refresh Reminder Report	End date has been reached	”Refresh Reminder Report” on page 100
Expired Content	Expired date has been reached	”Expired Content Report” on page 101

Report	Displays content blocks in this status	For more information, see
Content to Expire	Will expire within specified number of days	"Content to Expire Report" on page 101

Information on the Report

Each report displays the following information about content blocks in the selected status.

Field	Description
Title	Title of content block.
ID	Internal number assigned to content block by **Ektron CMS400.NET**.
Date Modified	If a Start Date was assigned to the content block, it appears here.
Last Editor	The user who last edited the content block.
Path	Folder location of content block.

Sorting and Filtering Content Reports

In each content report, you can sort and filter the data. These include:

- Sorting by column
- Filtering by user
- Filtering by content folder

The sorting and filtering actions in each content report are identical. The following section uses the checked-in content report as an example.

Sorting by Column Heading

You can sort report data by any column heading. By clicking on a heading, you can sort the report by

- Title
- ID
- Last editor
- Date Modified

Filter by User

To display only content that was checked in by a user, click the name of the user in the report. When you do, the report redisplays, showing only content blocks which that user checked in.

Filter by Content Folder

To display only content that was checked in to a selected folder, click the folder in the report. When you do, the report redisplays, showing only content blocks in that folder.

Performing an Action on Several Content Blocks

You can perform the following actions on several or all content blocks in the Approvals, Checked in, and Checked out reports.

Report	Action you can perform
Approvals	Approve
Checked in	Submit for publication
Checked out	Check in

To select several reports, check the relevant checkboxes (illustrated below). To select all reports, click **Select All**.

Then, click the button at the top left to perform the action on the selected content blocks.

Viewing/Editing Content Blocks on the Report

To view (and possibly edit) any content block on a report, click it. It appears on the View Content screen (illustrated below).

The View Content screen provides several toolbar options that you can perform on the content block. These options are explained in "To turn off autohide, move the cursor to the left frame and click the push pin icon. When you do, the push pin returns to its original position." on page 22.

Approvals Reports

Each content block awaiting your approval appears on this report. Thus, you can quickly find all such content blocks without searching through all folders and continue with the proper workflow.

The View All Content Awaiting Approval screen displays the following information about these content blocks.

Field	Description
Title	Title of content block.
Request Type	Request made for the content block. Either **Publish** or **Delete.**
Start Date	Start date, if any, assigned to the content block. Determines when content will go live on Web site.
Submitted By	User who submitted content for approval.
Path	Path to content folder where content block resides.

Below is an example of the View All Content Awaiting Approval screen.

View All Content Awaiting Approval

Select All Clear All

Title	Request Type	Start Date	Submitted by	Path
☐ Contact Ektron	Publish	[None Specified]	Administrator, Application	\
☐ Support Page	Publish	[None Specified]	Administrator, Application	\
☐ Plastic Molder #123	Publish	[None Specified]	Administrator, Application	\Human_Re

Approving/Declining Content Blocks

From the approvals report, you can approve or decline content blocks that were submitted to you. The steps below explain how to do so.

Approve/Decline One Content Block

1. Access your Approvals report in the Workarea (see "Approvals Reports" on page 94).
2. Click the content block you want to approve or decline.
3. The View Content Awaiting Approval page is displayed.
4. Perform an action using the following table as a reference.

Button	Name	Description
	Publish	Accept changes to content block and publish it to site. Note: If there is a subsequent approver in the content's approval chain, this button is replaced by a Submit button.
	Decline	Reject changes and keep current version of content block live on Web site.
	Edit	Check out content block and make changes to it if desired.

Button	Name	Description
	View Published/ Staged	Toggle between published and submitted versions of content block. This can help you compare differences.
	Back	Go back to previous screen.

Approving Multiple Content Blocks

The selected content blocks are either submitted to the next publisher, published immediately, or deleted, depending on the approval chain set for the content block.

Checked In Report

The Checked In Content report displays all the content blocks currently in a checked in status.

To learn how to access, sort, view, edit and select content blocks on this report, see .

The report displays the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS400.NET.
Last Editor	Last user to edit the content block.
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS400.NET Web site.

Submitting Multiple Content Blocks

After selecting content blocks, use the submit toolbar option ( ) to submit them for approval or publication, depending on your position in the approval chain.

Checked Out Report

The Checked Out Content report displays all content blocks currently in a checked out status. The report displays the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS400.NET.
Last Editor	Last user to edit the content block.
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS400.NET Web site.

After selecting content blocks, check them in using the Checkin button ( ).

New Content Report

The New Content report displays content blocks in a *new* state, that is, they were created and saved but never published. The new content report contains the following information.

Column	Description
Title	Title of content block.

Column	Description
ID	ID number assigned to content block by Ektron CMS400.NET.
Last Editor	Last user to edit the content block.
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS400.NET Web site.

Submitted Report

The Submitted Content report displays all content blocks in a submitted state. The report contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS400.NET.
Last Editor	Last user to edit the content block.
Date Modified	Date and time content block was last edited.
Path	Folder location of content block in Ektron CMS400.NET Web site.

Viewing Position in Approval Chain

While viewing the Submitted Content report, you can view a content block's position is its approval chain. To do so, follow these steps.

1. From the Submitted Content Report, click the content block's title.

2. The View Content page is displayed.

3. Click the **Properties** tab.

4. The content block's position in the approval chain is indicated by red text on the **Approvals** line.

Start Date:	[None Specified]
End Date:	[None Specified]
Date Created:	07-Jun-2004 10:37 AM
Approval Method:	Force All Approvers
Approvals:	👤 EditorInChief 👤 SportsEditor
XML Configuration:	[None Specified] HTML Content Assumed(inheritec
Path	\Sports
Content Searchable:	Yes

Content Pending Start Date Report

The Pending Start Date Report displays all content blocks that were approved, but whose start dates haven't occurred. Each content block on the report contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS400.NET.
Last Editor	Last user to edit the content block.
Start Date	Date and time content block will go live on Web site.
Path	Folder location of content block in Ektron CMS400.NET Web site.

Editing Content with a Pending Start Date

You may edit a content block on the Pending Start Date Content report. To do so, follow these steps.

1. Click the content block you want to view.

2. The View Content page is displayed.

3. Using the toolbar at the top of the page, perform any action available.

Refresh Reminder Report

The Refresh Report displays all content blocks whose end date has passed and whose archive option is set to **Refresh Report**. These content blocks are still visible on the Web site. Their appearance on this report indicates that they are due for a content review. *See Also:* "Setting Archive Options" on page 53

Each item on the report contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS400.NET.
Last Editor	Last user to edit the content block.
Email	Click this icon to send instant email to the **Last Editor**. *See Also:* **Ektron CMS400.NET** Administrator manual chapter "E-Mail Features."
Date Modified	Date and time the content block was last updated.
Path	Folder location of content block in Ektron CMS400.NET Web site.

Expired Content Report

The Expired Content report displays all content blocks whose end date has passed. As such, they are no longer visible on the Web site. Each item on the list contains the following information.

Column	Description
Title	Title of content block.
ID	ID number assigned to content block by Ektron CMS400.NET.
Last Editor	Last user to edit the content block.
End Date	Date and time the content block expired.
Path	Folder location of content block in Ektron CMS400.NET Web site.

Editing Expired Content

You may edit any content block on the Expired Content report. To do so, follow these steps.

1. Click the content block you want to view.
2. The View Content page is displayed.
3. Using the toolbar at the top of the page, perform any action available.
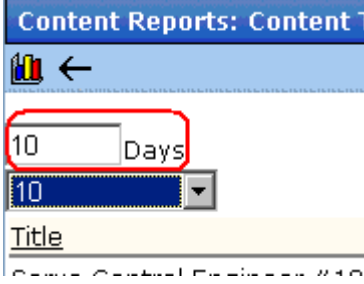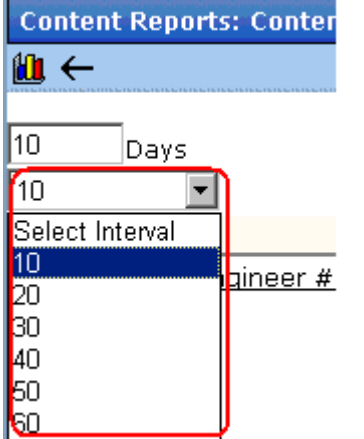
Content to Expire Report

The Content to Expire report lists all content blocks whose end date will occur within a number of days that you specify. For example, if today is January 1 and you select 10 days, the report lists all content blocks whose end date is January 1 through January 10.

After viewing the report, you can click any content block and proceed to the View Content screen for it. From there, you can edit information about the content block, including its end date if desired.

Selecting the Report's Date Range

To select the report's date range, you have two options:

Option	Illustration
Enter the number in the **Days** field	
Select a number from the dropdown that appears below the **Days** field	

After selecting a number of days, click the view icon (🏛) to see all content blocks that will expire within that number of days from today.

Library Folder
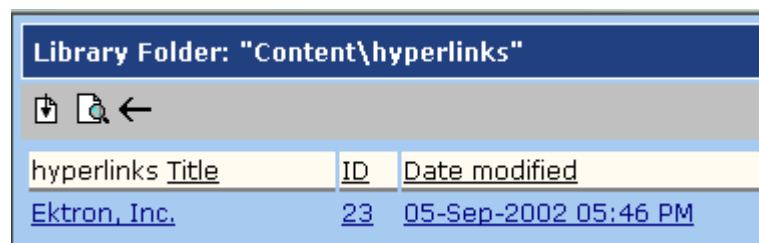
The library folder stores images, files, quicklinks and hyperlinks that can be inserted into editor content. Before you can insert them into content, you must copy them from your computer to a larger, file server computer that everyone editing your site can access.

This chapter explains how to copy such files and insert them into Web content.

Terms Used in this Chapter

- An *image* is any graphic file, which can include illustrations and photos. Common image file extensions are .gif., .jpg, .tiff, etc.

- A *file* is type of computer file that can be launched from a browser, such as Internet Explorer. Examples include a Microsoft Word document and a .PDF file.

- A *hyperlink* is a commonly used or hard to remember Web address (also known as a URL). After you add hyperlinks to the library, users can easily apply them to editor content.

  So for example, if the editor content is "Contact Ektron," the user can select the text, click the library button, select **hyperlinks** to find the Ektron hyperlink, and apply that hyperlink to the text.

Once the page is published, a person reading it can click the text to "jump" to the web address `www.ektron.com`.

- A *quicklink* is a special kind of hyperlink that jumps to another content block on your Web site. (A regular hyperlink jumps to a Web page on the internet.)

  Whenever a content block is created, a quicklink is created for it.

- A *form* is a quicklink to an HTML form content block. Whenever a content block is created, a form link is automatically created for it.

Accessing The Library

1. To access the library, click the Workarea button ( ) or icon.

   Workarea

2. Click the Library folder in the lower left corner of the Workarea.
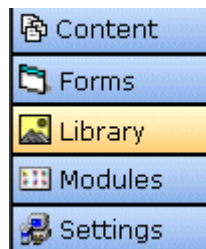
3. The Library folder appears.
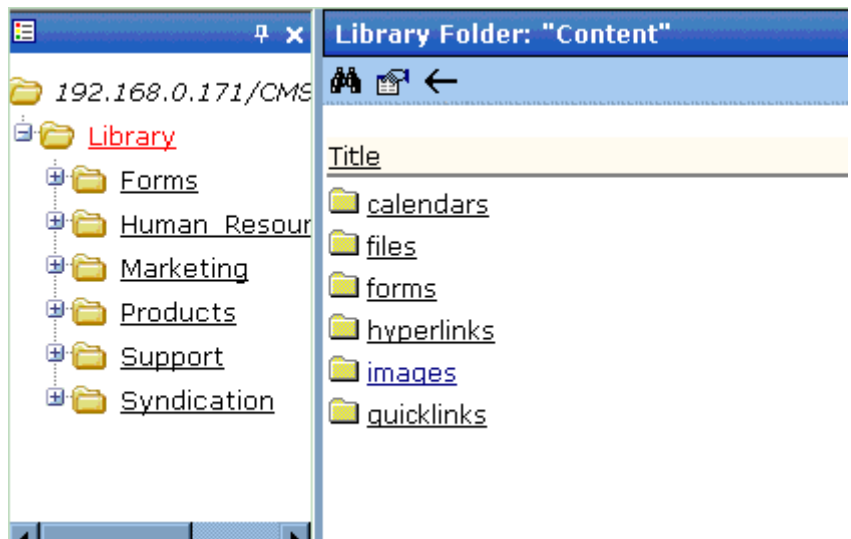
4. A list of the sub-folders appears. Also, a properties button on the toolbar lets you view any folder's properties. *See Also:* "Library Folder Properties" on page 105

And a search button lets you look for library items. *See Also:* "Searching the Library" on page 106

Library Folder Properties

To view a library folder's properties, follow these steps.

1. Click the Properties button (🖳).

2. TheLibrary Management screen appears. From here, you can view all options for a folder.

3. The library properties screen displays the following settings.

Field	Description
Image Extensions	File extensions of images that can be copied to this library folder. For example, .gif and .jpg.
Image Upload Path	Server location to which images are copied.
Physical Path	The physical path on the file server where uploaded images are stored.

Field	Description
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and your administrator needs to set up that folder on the file server.
File Extensions	Extensions of files that can be copied to this library folder. For example, .doc and .pdf.
File Upload Path	Server location to which files are copied.
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 your administrator needs to set up that folder on the file server.

Your system administrator controls these settings.

Searching the Library

You can search the library for items to insert into the content. The search helps find an item when you only know some information about it. For example, you know that an image's name includes **Ektron** but don't know the exact name or its folder.

To search the library, click the binoculars button from the library Workarea (illustrated below).
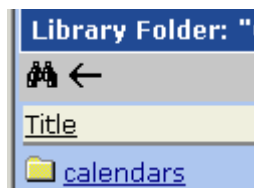
When you do, a search screen appears with several fields that let you narrow your search. The fields are described below.

NOTE Some search field check boxes are circles while others are squares. If the box is a circle, you can only choose one option. If it is a square, you can select as many as

---

you want. Only library assets that satisfy *all* search criteria appear on the Search found screen.

.

Field	Description
Keywords	Specify keywords that the search will use. A keyword can be a complete or partial name. The search looks for keywords in the file's internal name (for example, airplane.gif) or title The title is assigned by the user when the image is inserted into the library.
All Types	The search considers all library asset types.
Images only	The search only includes images.
Quicklinks Only	The search only includes quicklinks.
Files Only	The search only includes files.
Hyperlinks Only	The search only includes hyperlinks.
Filename Search	If you check this box, the search considers only the file name, *not* the title assigned by the user when the item is inserted into the library.
Only search items last edited by myself	The search only considers library assets that were last modified by you.

Files

For a definition of the term "files," see "Terms Used in this Chapter" on page 103.

Files must be copied to the Ektron CMS400.NET library before users can insert them into content. To copy a file to the library, follow these steps.

1. In the Workarea, browse the library folder and select a sub-folder to which you want to copy a file.

When you copy a file to a folder, only users with permissions to that folder can insert the file into their content blocks.
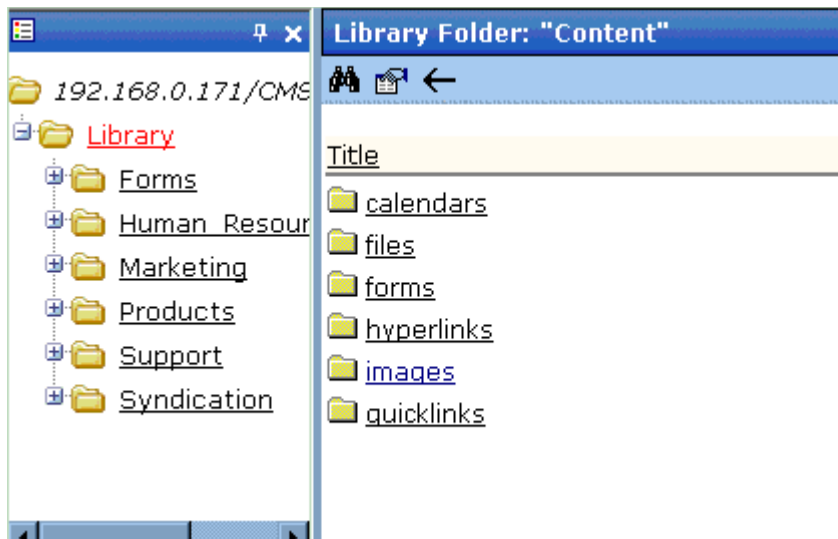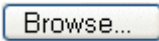
2. Several sub-folders appear in the right frame. Click the **files** folder.

3. The main screen of the files folder appears with a list of copied files.

4. Click the Add Library button ( ).

5. The Add File screen appears.
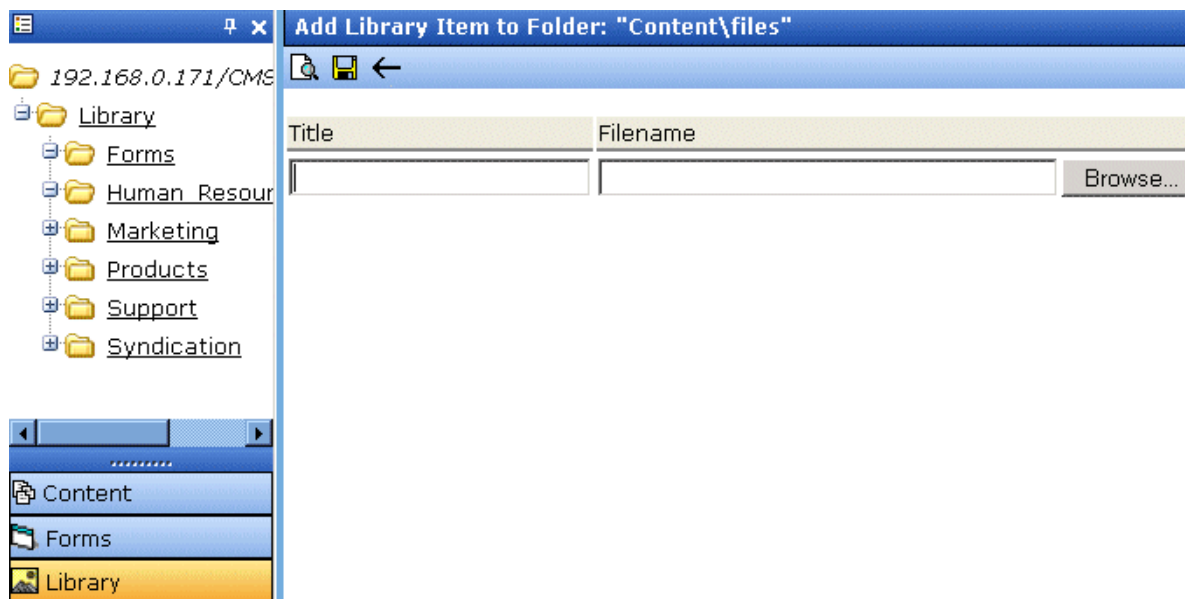
6. Enter the necessary information according to the following table.

Field	Description
Title	Enter a title for the file to be copied
Filename	Enter the folder path to the file to be copied. You can use the **Browse** button to help you find the file.

Below is a description of the buttons on the screen.

Button	Name	Description
Browse...	Browse	Browse through the computer or network for the file.
🔍	Preview	View the file to make sure it's correct before uploading it. Note: You need the file's application installed to preview it.
💾	Save	Add the file to the library.
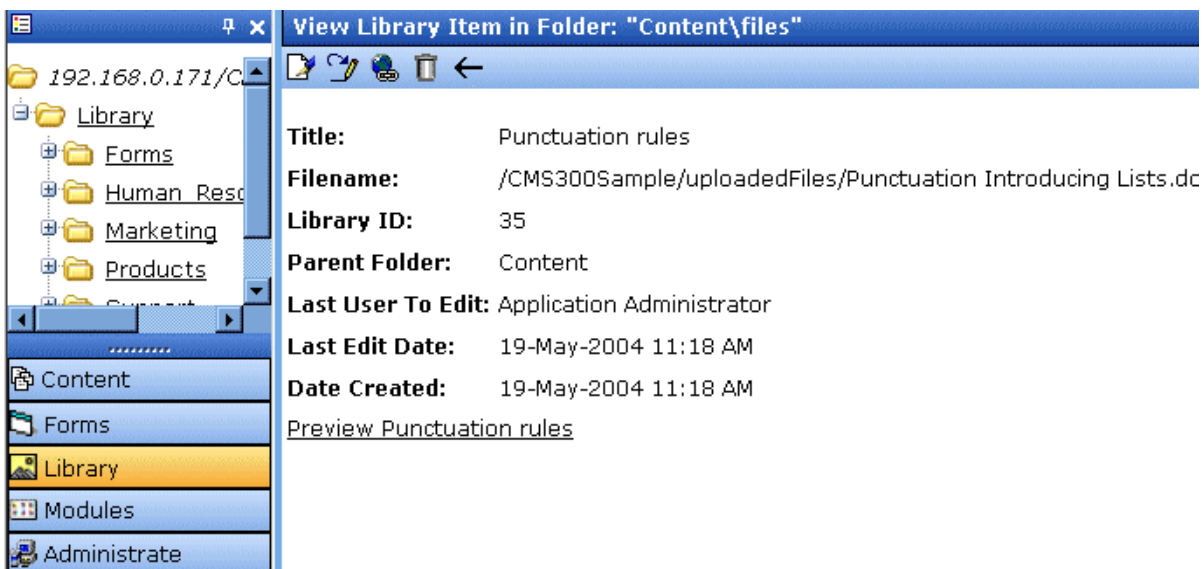
Button	Name	Description
←	Back	Return to the previous screen.

After you enter the necessary information and click the Save button, the file is copied. Now, users with permissions to that folder can insert the file into their content.

Viewing Files

Once a file is copied to the library, you may preview it. To preview a copied file, follow these steps.

1. Navigate to the library folder to which the file was copied.
2. A list of files in that folder appears.
3. Click the file you want to preview.
4. The view file screen appears.

View Library Item in Folder: "Content\files"

Title:	Punctuation rules
Filename:	/CMS300Sample/uploadedFiles/Punctuation Introducing Lists.dc
Library ID:	35
Parent Folder:	Content
Last User To Edit:	Application Administrator
Last Edit Date:	19-May-2004 11:18 AM
Date Created:	19-May-2004 11:18 AM

Preview Punctuation rules

The table below describes each field on the screen.

Field	Description
Title	Title assigned by user who copied or edited it.
Filename	Filename and location on the server.
Library ID	ID number assigned by Ektron CMS400.NET when file was originally copied.
Parent Folder	File's parent folder. Users need permissions to this folder to insert the file into content.
Last User to Edit	Last user who changed file.
Last Edit Date	When file was last edited.
Date Created	When file was originally copied to library.

5. To view the file, click the **Preview** link at the bottom of the screen.

6. The application used to open the selected file type launches and displays the file.

NOTE You may need to download some files before you can be view them (for example, .mdb, .mp3, .zip, etc.).

7. To close the preview window, click the close button in the top right corner of the window.

Editing a File's Title

You can edit the title of a file that has been copied to the library. To do so, follow these steps.

1. Access the view file screen, as described in "Viewing Files" on page 110.

2. Click the Edit button ( ).

3. The edit file screen appears.

Title	ID Filename
Punctuation rules	35 /CMS300Sample/uploadedFiles/Punctuation Introducing Lists.
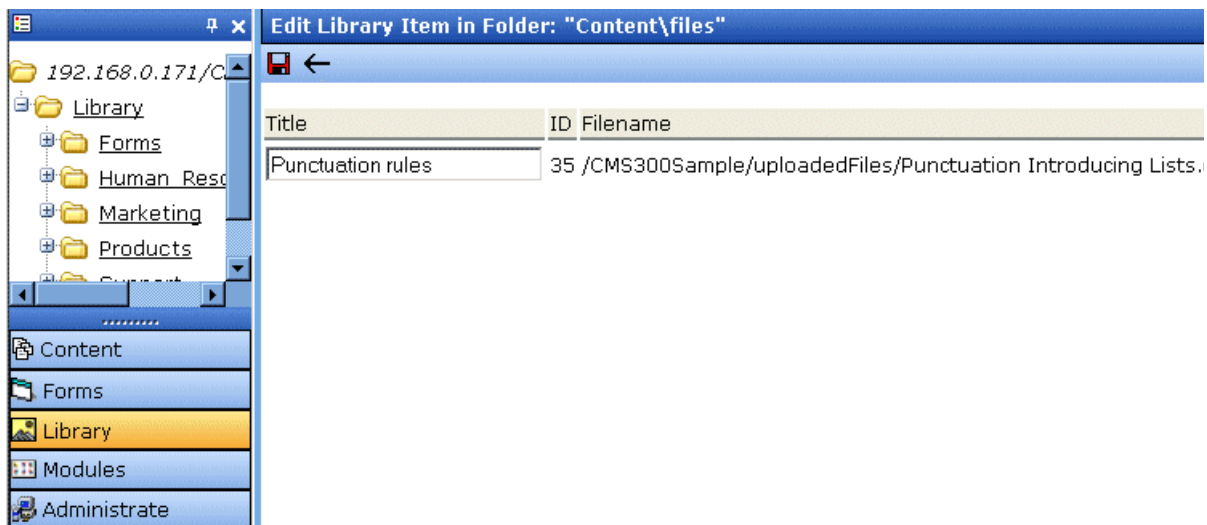
4. Change the title of the file.

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

Overwriting Files

If a library file becomes out of date or the wrong version was copied, you may replace it with a new version. Overwriting files lets you minimize disk space and the number of library files.

NOTE The ability to overwrite a library file is a privilege granted by the system administrator. If you do not see an Overwrite button ( ) on the View Library Item in Folder screen, you do not have permission to overwrite.

To overwrite a file, follow these steps

1. Navigate to the View File screen for the file you want to overwrite, as described in "Viewing Files" on page 110.

2. Click the Overwrite button ( ).

3. The Overwrite File screen appears.
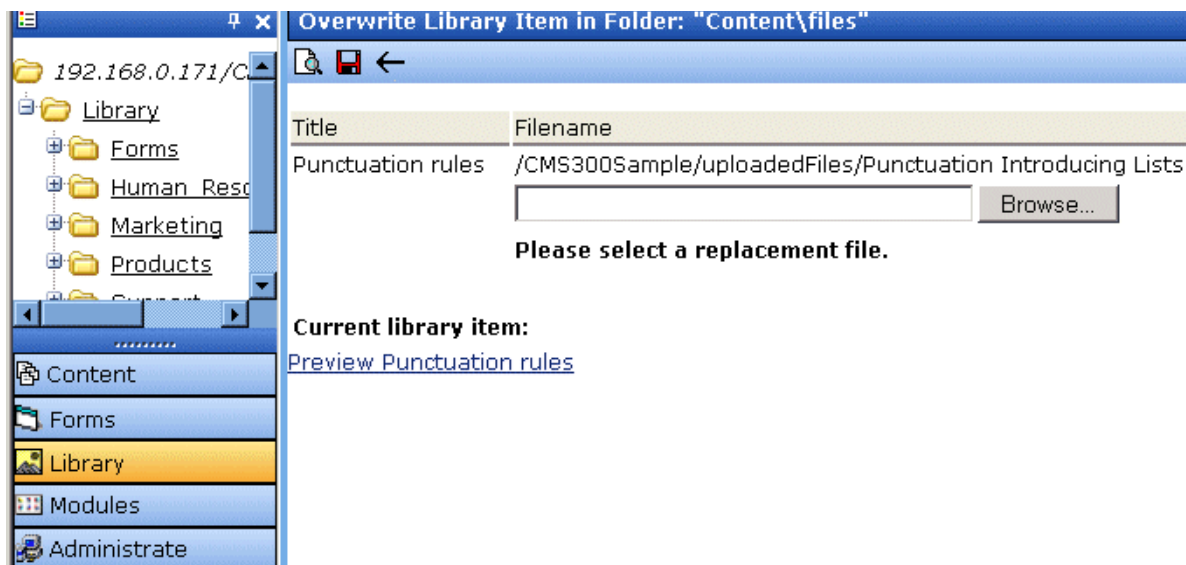
4. Click the **Browse** button.

5. A window opens that lets you locate the new file.

6. Click the file, then click the **Open** button.

7. You return to the overwrite file screen with the path to the new file in the text field.
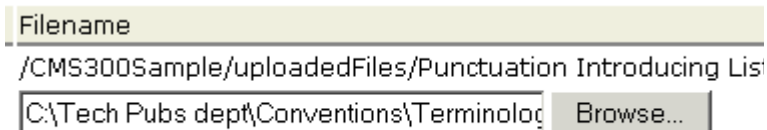
8. To preview the file before you copy it, click the Preview button ( ). The file is previewed in a separate window. Click the **X** button in the top right corner of the screen to close it and return to the Workarea.

9. To overwrite the current version of the file with this version, click the Update button ( ).

10. The following message appears.
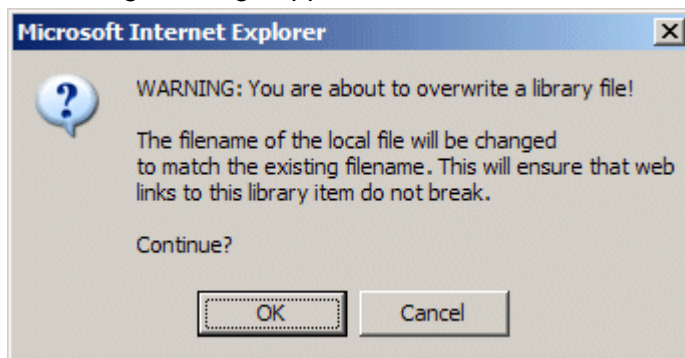
11. To overwrite the file, click **OK**.

Adding a File to Your Content

After a file is copied to the library, users can add it to a content block. To add a file to a content block, follow these steps.

1. Invoke the editor by adding or editing a content block in Ektron CMS400.NET.
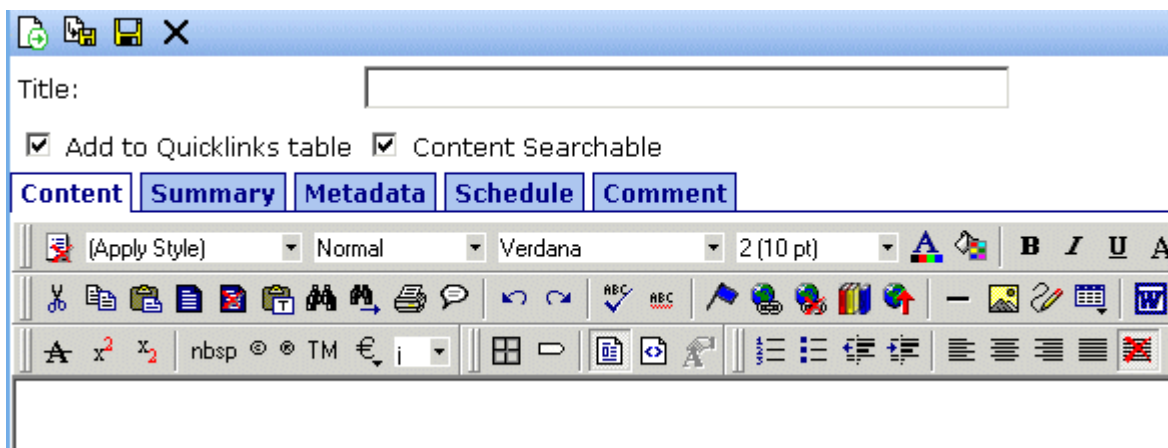
2. Click the Library button ().

3. The library opens.

4. Navigate to the folder that contains the file you want to insert.
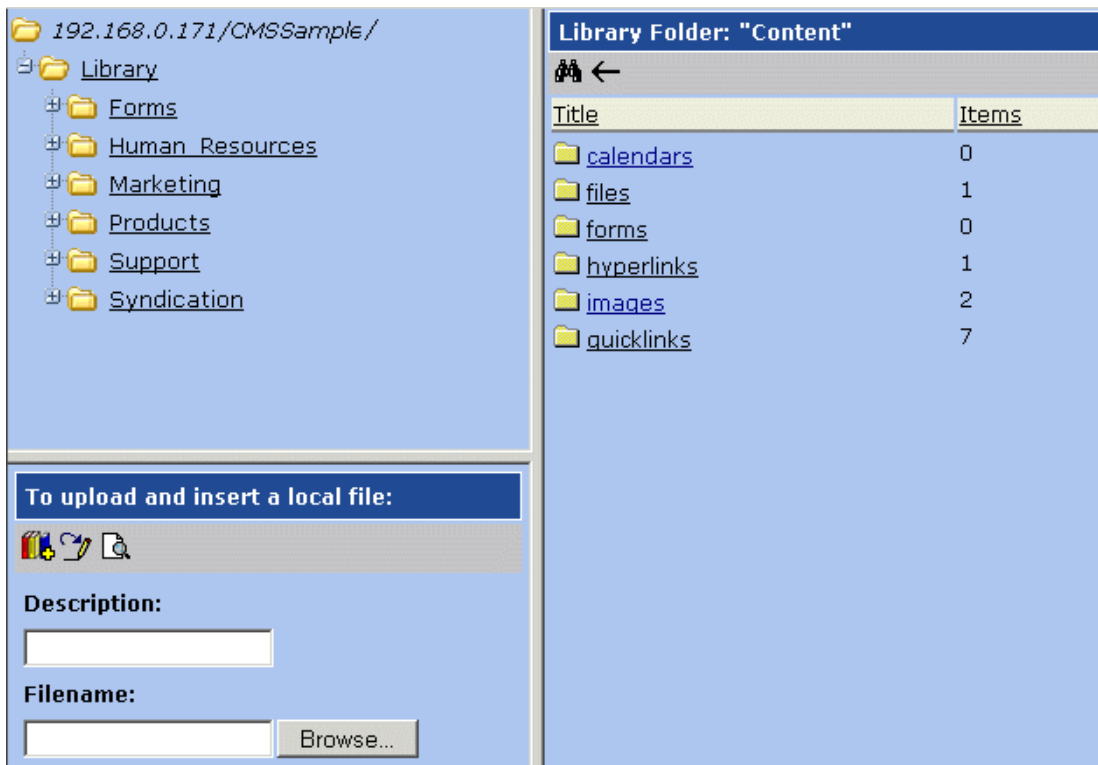
5. Click the **Files** folder on the right side of the library to display files copied to that folder.

NOTE   If the file you want to insert has not been copied, you may copy it by using the lower left section of the screen.

6. Click the file that you want to insert into the content.

NOTE   You may preview the file by clicking the preview button.

7. Click the insert button (⬇) to insert the file.

8. A hyperlink to the file appears in your content.
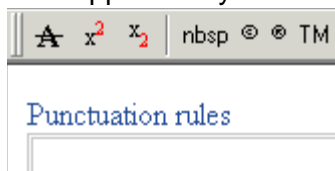
You can click the link to open the file.

Hyperlinks

For a definition of the term "hyperlinks," see "Terms Used in this Chapter" on page 103.

Adding Hyperlinks

You must copy hyperlinks to the library before content creators can insert them into content blocks. To copy a hyperlink to the library, follow the procedure described in "Files" on page 107. The only difference is that you insert a hyperlink instead of a file.

Viewing Hyperlinks

To view a hyperlink, follow the procedure described in "Viewing Files" on page 110. The only difference is that you view a hyperlink instead of a file.

Editing Hyperlinks

To edit a hyperlink, follow the procedure described in "Editing a File's Title" on page 111. The only difference is that you edit a hyperlink title instead of a file title. You can also edit the URL.

Adding Hyperlinks to Your Content

Once a hyperlink is added to the library, users can add the hyperlink to their content blocks.

To add a hyperlink to a content block, follow the procedure described in "Adding a File to Your Content" on page 114. The only difference is that you add a hyperlink instead of a file.

Images

For a definition of the term "images," see "Terms Used in this Chapter" on page 103.

Uploading Images

You must copy images to the library before content creators can insert them into content blocks. To copy an image to the library,

follow the procedure described in "Files" on page 107. The only difference is that you add an image instead of a file.

Viewing Images

To view an image, follow the procedure described in "Viewing Files" on page 110. The only difference is that you view an image instead of a file.

Editing Image Titles

To edit an image's title, follow the procedure described in "Editing a File's Title" on page 111. The only difference is that you edit an image's title instead of a file title.

Overwriting Images

When an image in the library becomes out of date, or if the wrong version of an image was copied, you may overwrite that image with a new or correct version. Overwriting images minimizes disk space and the number of copied library images.

NOTE Overwriting images is an advanced permission that you may or may not have.

To overwrite an image, follow the procedure described in "Overwriting Files" on page 112. The only difference is that you overwrite an image instead of a file.

NOTE You can only overwrite an image with another image of the same extension. (that is, .gif > .gif, not .jpg > .gif)

Adding Images to Your Content

Once an image is added to the library, users can add it to a content block.

To add an image to a content block, follow the procedure described in "Adding a File to Your Content" on page 114. The only difference is that you add an image instead of a file.

The image is placed into the picture properties dialog box, where you can change it before inserting it. For information about the picture properties dialog box, see "Using the First Picture Properties Dialog Box" on page 269.

Quicklinks and Forms

For a definition of the terms quicklinks and forms, see "Terms Used in this Chapter" on page 103.

Adding a Quicklink or Form to Content

After a new content block is created, users can insert a quicklink or form to it into any other content block. To do so, follow the procedure described in "Adding a File to Your Content" on page 114. The only difference is that you add a quicklink or form instead of a file.

Be sure to place the cursor where you want the quicklink or form to appear before inserting it. When the quicklink or form is inserted, the title of the "jumped to" content block appears in the content. To test the quicklink or form, select the newly-inserted title and double click it.

When the page is published, a reader can click the link to jump to the quicklink or form page.

Viewing Quicklinks or Forms

To view a quicklink or form, follow the procedure described in "Viewing Files" on page 110. The only difference is that you view a quicklink or form instead of a file.

The table below describes each field on the quicklinks display.

Field	Description
Title	Title given to the hyperlink or form by the user who added it, or last edited it.
URL Link	URL link for the quicklink or form.
Library ID	ID number assigned automatically by Ektron CMS400.NET when the quicklink or form was originally added.
Parent Folder	Parent folder that the quicklink or form belongs to. Users need permissions to this folder to be able to access the quicklink or form.

| Field	Description
Last User to Edit	Last user that made changes to the quicklink or form.
Last Edit Date	The date the quicklink or form was last edited.
Date Created	The date and time the quicklink or form was originally added to the Ektron CMS400.NET library.

To preview a quicklink or form, click the link at the bottom of the page.

Working with Collections

A collection provides 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.
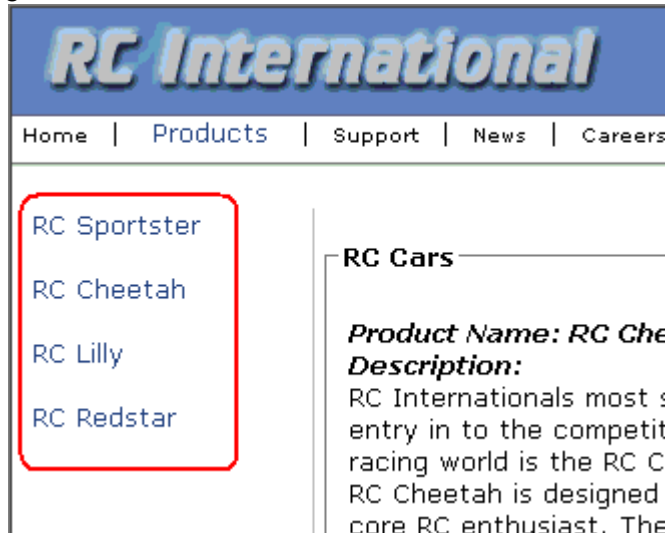
You can also use a collection to display other listings, such as job postings, press releases, and knowledge base articles. The following graphic illustrates the use of a collection on the landing page of Ektron's Knowledge Base.
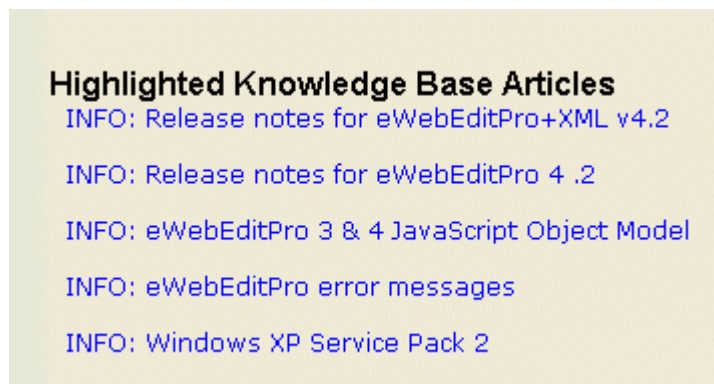
This section explains how to create collections. Your system administrator would then modify content blocks to display the collections on your Web site using the ecmCollection function.

This section explains how to find, create, and manage collections through the following subtopics.

- "Finding Collections" on page 121
- "Viewing a Collection" on page 124
- "Creating a Collection" on page 126
- "Editing Content Blocks in a Collection" on page 132
- "Reordering Collections List" on page 133
- "Editing Collection Information" on page 134
- "Deleting a Collection" on page 134
- "Working with Collections in a Multi-Language System" on page 135
- "Comparison of Collections, Menus, and the List Summary Features" on page 137

Finding Collections

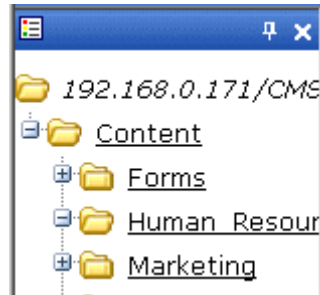Every collection is assigned to a folder. If you want to find the collections assigned to any folder, navigate to it and click the Collection button ( ). For more information, see "Finding a Collection by Navigating to its Content Folder" on page 121.

Since collections can be assigned to several content folders, the Modules folder provides a central Collections folder, which displays all collections on one screen, regardless of their content folder.

Finding a Collection by Navigating to its Content Folder

To access collections for a content folder, follow these steps.

1. Click the content folder that contains the collection.

2. The folder's content blocks appear in the right frame.

3. If you are using **Ektron CMS400.NET**'s multi-language support features, select the language. *See Also:* "Working with Collections in a Multi-Language System" on page 135

4. Click the Collections button (🖻).

5. The View Collections screen appears.

The screen displays each collection created for the folder. The following table explains each column.

Column	Description
Title	The title assigned to the collection by the creator.
ID	The ID assigned to the collection by Ektron CMS400.NET. This number is used to store and retrieve the data to/from the database.
Date Modified	When the collection was last edited.
URL	The default template used to display the content.

To learn more about a collection and perform tasks on it, proceed to "Viewing a Collection" on page 124.

Finding a Collection Using the Collections Folder

To access the Collections screen that displays *all* collections in *all* content folders, follow these steps.

1. From the top-level folders in the lower left frame of your Workarea, click **Modules**.

2. Click the **Collections** folder.

3. The Collection Report screen appears.

The screen has four columns. The following table describes each column.

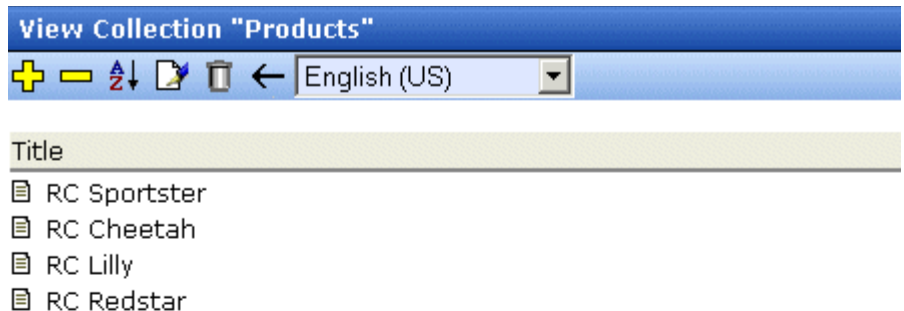| Column Title	Description
Title	Title given to collection by user who created, or last edited, it.
ID	ID number assigned by Ektron CMS400.NET. (Developers use this number to reference the collection in ecmCollection custom function.)
Description	Description given to collection by user who created, or last edited, it.
Path	Folder location of the collection.

To learn more about the collection and perform tasks on it, proceed to "Viewing a Collection" on page 124.

You can also add a collection from the Collections Report screen. *See Also:* "Creating a Collection" on page 126

Viewing a Collection

To view a collection, follow these steps.

1. Select a collection using the procedure described in "Finding a Collection by Navigating to its Content Folder" on page 121 or "Finding a Collection Using the Collections Folder" on page 123

2. The View Collection screen appears.

.

The screen displays each item in the collection. To learn more about a collection, click **More Info**. When you do, the lower section

of the screen displays the following information about the collection.

- title
- description
- ID number
- template
- last user who edited it
- last date when it was edited
- date it was created
- whether or not the content folder's sub-folders can be included
- for each content block in the collection
  - a link to the block (click this to view and edit the block)
  - ID number
  - quickink

Collections Toolbar

The following table describes the collection toolbar buttons.

Button	Name	Description	More Information
	Add	Add new collection or add items to a collection.	"Creating a Collection" on page 126
	Remove	Remove items from a collection.	"Removing Content Blocks from the Collection" on page 132
	Reorder	Reorder items in a collection.	"Reordering Collections List" on page 133
	Edit	Edit collection information.	"Editing Collection Information" on page 134
	Delete	Delete a collection.	"Deleting a Collection" on page 134

Button	Name	Description	More Information
←	Back	Return to previous screen.	

Creating a Collection

Creating a collection involves two steps:

- "Adding a Collection" on page 126
- "Assigning Content Blocks to the Collection" on page 129

The following sections explain each step.

Adding a Collection

To add a new collection, follow these steps.

1. Navigate to the folder in which you want to create the collection.

2. If you are using **Ektron CMS400.NET**'s multi-language support features, select the language. *See Also:* "Working with Collections in a Multi-Language System" on page 135

3. Click the Collections button (📋).

NOTE If you access the collection via the Collections folder, you cannot choose the collection's folder. It is automatically placed in the Content folder.

View Collections in Folder: "Human_Resources"

Title	ID	Date Modified	URL Link
Main Jobs listing	2	04-Nov-2002 03:36 PM	/CMS300Sample/hr.asp

4. Click the Add button (➕).

5. The Add Collection screen appears.

Add Collection

Title: New Collection

Template: /CMS300Sample/index.asp

Leave the above template empty if you wish to use the Quicklinks

Description: New collection with various content blocks

☑ **Include Subfolders**

6. Complete the screen using the following table.

Field	Description
Title	Assign a unique title to the collection.
Template	Enter the default template for the collection. This template is used to display the content of the links generated if no template is assigned in the custom function. If left blank, the links use their respective quicklinks. *See Also:* "Default Template vs. Quicklinks" on page 128
Description	Add a more detailed description for the collection.
Include Sub-folders	Check if you want to add to the collection content blocks in sub-folders of the content folder.

7. Click the Save button (💾).

You can now assign content blocks to the collection. See
"Assigning Content Blocks to the Collection" on page 129.

Default Template vs. Quicklinks

You can specify a template that determines the screen display for a
collection when it is published on a Web page. (See your system
administrator for information about **Ektron CMS400.NET** templates.)
Or, you can disable the template and, instead, use quicklinks to
determine the page template. (*See Also:* "Quicklinks and Forms"
on page 118)

If you specify a *template*, all content blocks in the collection use the
same screen elements other than the specific content. For
example, the page header, footer and information in the right frame
of the screen are all the same. On the other hand, if you use
quicklinks, every page in the collection uses its original template.
As a result, the surrounding information may change for every
content block in the collection.

Here is an example of links using quicklinks. Notice that content
uses several templates. As a result, when a user clicks a content
block in the collection, the screen information around the content
block changes according to its template.

Title	ID	URL Link
Home Page Content	1	/CMS300Sample/index.asp?id=1
Support Page	8	/CMS300Sample/index.asp?id=8
Plastic Molder #123	13	/CMS300Sample/hr.asp?id=13
RC Cheetah	5	/CMS300Sample/products.asp?id=5
RC Redstar	7	/CMS300Sample/products.asp?id=7
New Content Block	17	/CMS300Sample/index.asp?id=17
Contact Ektron	15	/CMS300Sample/index.asp?id=15

Here is an example of links when using a template named
index.asp. In this case, all pages have the same information
surrounding the content block.

| Title	ID	URL Link
Home Page Content	1	/CMS300Sample/index.asp?id=1
Support Page	8	/CMS300Sample/index.asp?id=8
Plastic Molder #123	13	/CMS300Sample/index.asp?id=13
RC Cheetah	5	/CMS300Sample/index.asp?id=5
RC Redstar	7	/CMS300Sample/index.asp?id=7
New Content Block	17	/CMS300Sample/index.asp?id=17
Contact Ektron	15	/CMS300Sample/index.asp?id=15

To toggle between a default template and quicklinks, follow these steps.

1. Access the Edit Collection screen for the collection you want to edit.

2. Modify the **Template** field.

3. Click the Save (🖫) button.
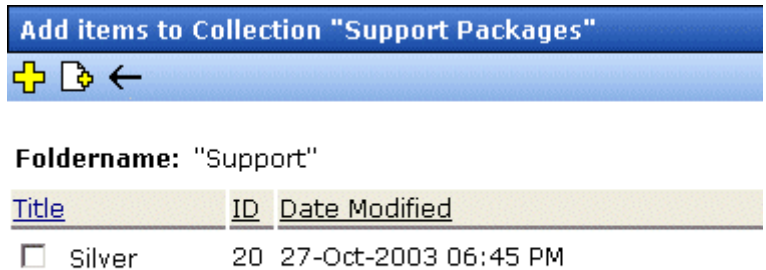
Assigning Content Blocks to the Collection

After a collection is created, your next step is to assign content blocks to it. To do so, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 121.

2. Access the View Collection Screen, as described in "Viewing a Collection" on page 124.

3. Click the collection to which you want to assign content blocks.
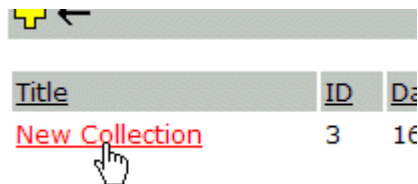
| Title	ID	Da
New Collection	3	16

4. The View Collection screen appears.

5. Click the Add button (➕).

6. The Add Items to Collection screen appears, displaying content blocks in the selected folder that are not part of the collection.

7. Check boxes next to content blocks to add to the collection. You can only add content blocks in the selected folder or possibly its sub-folders. (Sub-folders are available if the **Include subfolders** field is checked for the collection.)

If a collection includes sub-folders, you can add content blocks from the sub-folders. On the View Collection screen, click a sub-folder to view its content blocks.
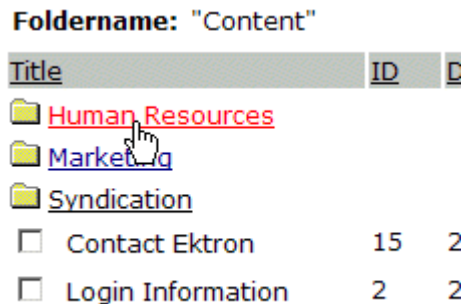
(To return to the parent folder, click the folder with the up arrow ()).

8. Check boxes next to content blocks that you want to add to the collection.

NOTE If you select a content block from a sub-folder, click the add button to add the selected content to the collection. Navigating between sub-folders deselects content blocks.

9. Click the Add button ( ).

Creating a New Content Block for a Collection

You can create a new content block while adding content block links to a collection. To add a content block, follow these steps.

1. Access the View Collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 121.

2. Access the View Collection Screen for a collection, as described in "Viewing a Collection" on page 124.

3. If you are using **Ektron CMS400.NET**'s multi-language support, select the language of the collection.

4. Click the Add button ( ).

5. The Add Items to Collection screen appears.

6. If your collection includes sub-folders and you want to add the content block to one of them, navigate to that sub-folder. Otherwise, proceed to the next step.

7. Click the Add Content button ( ).

8. The Add Content screen appears. If you are using **Ektron CMS400.NET**'s multi-language support, the content block's language appears next to the title. The language is derived from the collection's language and cannot be changed.
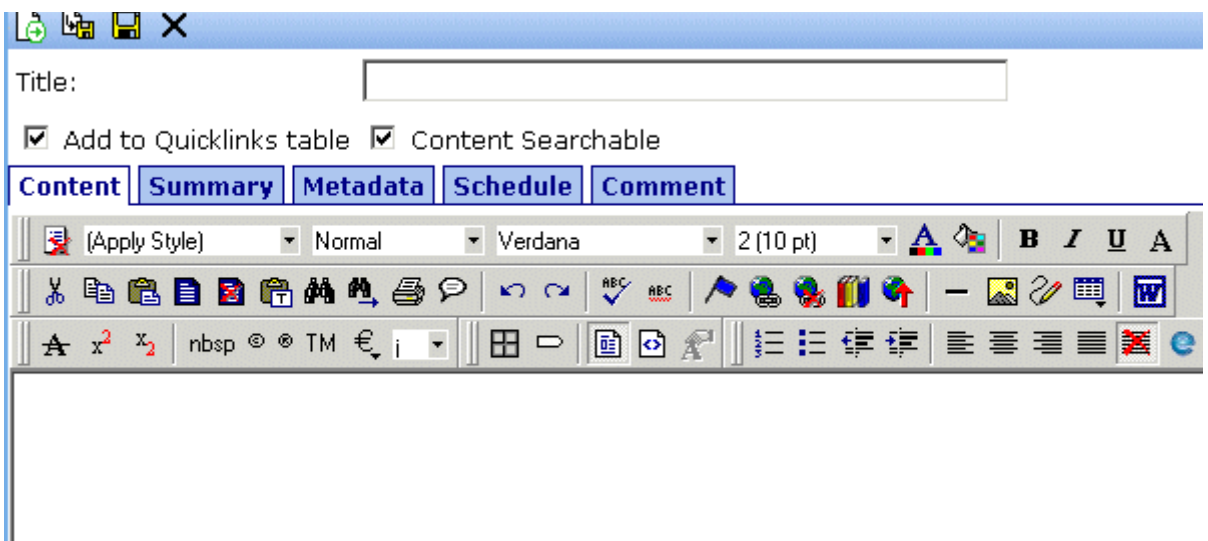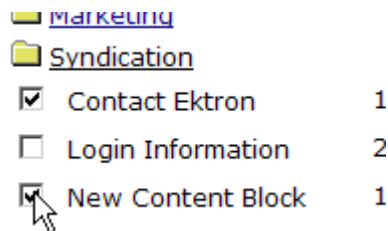
9. Create the content block.

10. Click a workflow option in the Add Content screen.

11. The Add Content screen closes, and the new content block link appears in the list of links available to the collection.

12. Check off the content block you created and other content blocks.

13. Click the Add button ( ) to add the content blocks to the collection.

Editing Content Blocks in a Collection

After a collection is created, you can add or remove content block links to and from it.

Adding Content Blocks to the Collection

For information about adding content block links to a collection, see "Assigning Content Blocks to the Collection" on page 129.

Removing Content Blocks from the Collection

To remove a content block link from a collection, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 121.

2. Access the View Collection Screen, as described in "Viewing a Collection" on page 124.

3. Click the Remove button (![remove]).

4. The Delete Items from Collection screen appears.

5. Click boxes next to links that you want to delete.

Click **Select All** to select all boxes.

Click **Clear All** to remove all check marks.

6. Click the Delete button (![delete]).

Reordering Collections List

After a collection is created, and more than one content block is assigned to it, you can reorder the collections list. To do so, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 121.

2. Access the View Collection Screen, as described in "Viewing a Collection" on page 124.

3. Click the Reorder button (![reorder]).

4. The Reorder Collection screen appears.

Reorder Collection "Support Packages"

First
| Internal Support Policies |
| RC International Support |
| Support Request Form |

5. Click the content block whose order you want to change.

6. Click the up or down arrow to move the content block in either direction.

7. Repeat steps five and six until you set the desired order.

8. Click the Update button ( ).

Editing Collection Information

To edit information about a collection, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in "Finding a Collection by Navigating to its Content Folder" on page 121.

2. Access the View Collection Screen, as described in "Viewing a Collection" on page 124.

3. Click the collection whose information you want to change.

4. Change any of the field values. For documentation of the fields, see "Complete the screen using the following table." on page 127.

Deleting a Collection

When you no longer want a collection, you can delete it. To delete a collection, follow these steps.

1. Access the collections screen for the content folder in which you want to add the collection, as described in ”Finding a Collection by Navigating to its Content Folder” on page 121.

2. Access the View Collection Screen, as described in ”Viewing a Collection” on page 124.

3. Click the Delete button ( ).

4. A confirmation message appears.

5. Click **OK** to proceed.

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 example, prior to the 4.7 Release, the RC International sample site's products page had a collection in the default application language (English unless you change it). From 4.7 on, you can create an edition of a collection in every enabled language.

When a visitor to your site selects a language then navigates to a page with a collection, **Ektron CMS400.NET** displays the collection in the selected language if available. If not, **Ektron CMS400.NET** displays nothing.

NOTE Note the contrast between the collections and content blocks: if a collection is not available in the selected language, nothing appears. But if a content block is not available in the selected language, content in the default language appears.

When creating a collection for a foreign language, decide if you want to create

- a foreign edition of an existing collection, or

- a new collection in a foreign language

For example, if you want to provide several versions of a single page that change depending on the language selected by the user, see ”Creating a Language-Specific Collection if Another Edition Exists” on page 136.

On the other hand, if you are creating a collection to appear only on a foreign language page, and no other edition of the collection will appear on your site, see "Creating a Language-Specific Collection if Another Edition Does Not Exist" on page 136.

You can only add content blocks in the language of a collection. So, create the content blocks first, then create the collection that links to them.

Creating a Language-Specific Collection if Another Edition Exists

1. Click the content folder in which your collection exists. The folder's contents are displayed.

2. Click the View Collections button ( ).

3. The View Collections screen is displayed.

4. Select the collection that you want to translate.

5. From the Add drop-down list, select the language of the new collection.

6. Using the Add button ( ), select the content blocks to add to the collection. Navigate through the folders to the content blocks you want to add. You can only add content blocks in the selected language.

Creating a Language-Specific Collection if Another Edition Does Not Exist

1. Navigate to the folder in which you will create the collection.

2. Click the View Collections button ( ). The View Collections screen is displayed.

3. Click the Add button ( ) and enter basic information about the collection. (This screen is described in "Creating a Collection" on page 126.)

4. The View Collections in Folder screen appears. Click the collection you just created.

5. From the Add drop-down list, select the language of the new collection.

6. Using the Add button (🟡), select the content blocks to add to the collection. Navigate through the folders to the content block you want to add. You can only add content blocks in the selected language.

Comparison of Collections, Menus, and the List Summary Features

A menu, a collection, and the ListSummary function are similar in that they let you add a list of links to a Web page. The following table compares these features to help you understand which one would best accommodate your needs for a particular page.

NOTE To implement these features, the assistance of a developer is required.

	Collection	**Menu**	**List Summary**
Display title of *all* content blocks in a folder and possibly subfolders			**X**
Display title of *selected* content blocks in a folder and possibly subfolders	**X**	**X**	
Display external hyperlinks & library assets		**X**	
Display content block summary (optional)	**X**		**X**

|	Collection	Menu	List Summary
Display additional content block information: • comment • last modified date • start date • end date • user who last edited it • ID number • path relative to your site's root	**X**		
Can be multi-leveled (that is, you can have submenus)		**X**	

Working with Menus

Ektron CMS400.NET's Menu feature lets users create and maintain a dropdown menu system for your Web site. The menu options can link to content blocks, library assets, external hyperlinks, and submenus. Below is a sample menu.

In this example (delivered with **Ektron CMS400.NET**), the menu appears when the person viewing the Web page moves the cursor over **Products**. The above display illustrates the menu's appearance to a visitor to your site.

However, if a content contributor with permission to edit menus signs in to **Ektron CMS400.NET** then views the menu, it has additional options for editing the menu or adding a content block.
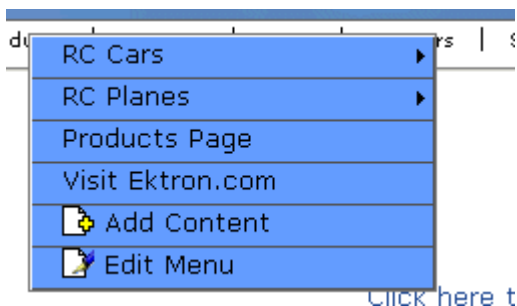
NOTE   For more information on adding content, see "Adding a Content Block" on page 36.

This chapter describes the following aspects of managing menus:

- what they are
- how they can be used
- how to the add, edit, view and delete a them

What's In This Chapter

The following information is included in this chapter:

The Structure of Menus and Menu Items

Menus have the following structure:

- **menu** - top level structure that is a placeholder for menu items and submenus. It is assigned to a content folder. If a menu item links to a content block, the block must reside in the assigned folder or one of its subfolders.

  A menu also identifies the page template used to display menu options that are content blocks.

- **menu item** - the individual options on a menu; can be any of the following
  - content block

     – library asset

     – external hyperlink (link to a page outside your Web site)

     – submenu (a link to another menu. In the illustration below, the menu on the right is a submenu. It appears when the user hovers the cursor over the menu item to the left, **RC Planes**. The right pointing arrow indicates that a submenu is available.)
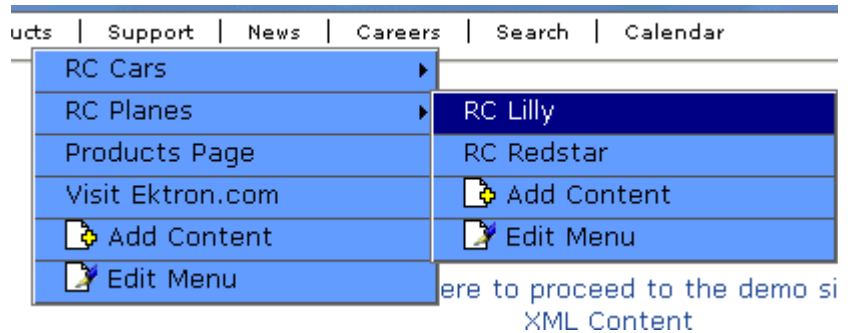
Access to the Menus Feature

There are three ways to access the Menus feature:

- the Workarea, by choosing the associated content folder then clicking the View Menus button (![icon]( ))
- the Workarea, by choosing **Modules > Menus**
- the **Edit Menu** option on the sample menu displayed above

If you choose the first or second option, you then select a specific menu. Next, that menu appears on the View menus screen. For the third option, the selected menu appears on the View Menu screen.

From the View Menus screen, you can perform the following actions on a menu.

- Create a new menu
- Edit menu information (URL and template link)
- Translate the menu into another language

- Delete the menu
- Add or remove items
- Change the sequence of menu items
- Edit menu items
- For submenus
  - add /remove items
  - change sequence of menu items
  - edit menu information
  - edit information about menu items

Managing Menus

Ektron CMS400.NET gives you the flexibility to add, edit, view and delete a menu. The following section explains how to do that.

Adding a New Menu

You can add a new menu by navigating to the folder that contains its content blocks or by choosing **Modules > Menus** from the left frame of the Workarea. If you choose **Modules > Menus**,

- you cannot select the menu's language -- it assumes the current language. In contrast, if you create a menu after choosing a content folder, you can select a language during the menu creation process.
- you cannot select the menu's folder -- it is automatically assigned to the root folder. In contrast, if you create a menu after choosing a content folder, you select a folder while creating the menu.

Adding a Menu via Content Folder

1. Navigate to the content folder that contains the content blocks you want to display on the menu. The content blocks can reside in the selected folder or any of its subfolders.
2. In the View Language dropdown list, select the language of the menu you want to create.

3. Click the View Menus button (🗐).

4. The View All Menus screen appears.

5. Click the Add button (➕).

6. The Add Menu screen appears.

Add Menu

💾 ←

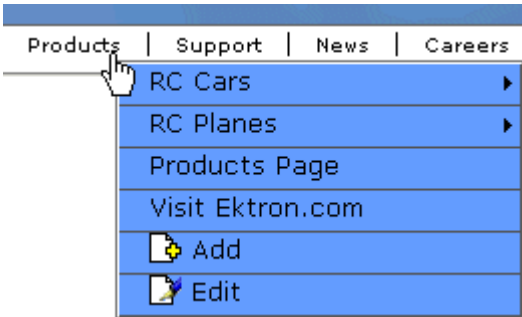| Title:		[English (US)]
URL Link:	/CMS300Sample/	Select Page
	The URL link will associate the menu title with a landing page.	
Template Link:	/CMS300Sample/	
	Leave the above template empty if you wish to use the Quicklinks	
Description:		

7. Using the following table, complete the fields on the Add Menu screen.

Fields on the Add/Edit Menu Screen

Field	Description
Title	The name given to the menu by the creator.

Field	Description
URL Link	After you create a menu, your developer links it to text or an image on a Web page by modifying a page template. As a result, when a user reading that Web page moves the cursor over the text or image, the menu appears. In the illustration below, the menu appears when the user moves the cursor over **Products**. You can also assign a URL link to a menu, using this field. If you do, and the user *clicks* the link text or image, he jumps to the specified page. For example, in this field you assign the product landing page, CMS400Example/products.aspx. In the illustration above, if the user *moves the cursor* over **Products**, the assigned menu appears. However, if the user *clicks* **Products** (as indicated by the hand), he jumps to CMS400Example/products.aspx. **Entering the Path to the Landing Page** This path must be relative. For example: /400Sample/index.aspx This URL path can be a static template path (like the one mentioned above) or a dynamic path, such as /400Sample/index.aspx?id=25

Field	Description
Template Link	Note: This field applies to content blocks only. It has no effect on other types of menu items (such as images).
	If you want to apply a template to this menu, enter the template here. If you do, all content blocks on this menu use this template when selected from the menu.
	If you do not enter a template here, the content blocks on this menu use the template specified in their quicklink.
	Overriding the Template Link
	You can override the menu template for any content block on this menu and, instead, use the template specified in its quicklink. To do so, follow these steps.
	1. Add all items to the menu. (See "Adding a Menu Item" on page 146)
	2. Go to the View Menus option.
	3. Click **More Info**.
	4. Click the menu item you want to change.
	5. At the **Link** field, change the value from **Menu Template** to **Quick Link**.
	Link: ⊙ QuickLink ○ Menu Template
	Important! If you created menus prior to upgrading to this version of **Ektron CMS400.NET**, those menu items are assigned as quicklinks. You cannot change them to template links simply by entering a template link here. Instead, you must go to each menu item and change the **Link** field value from **QuickLink** to **Menu Template** (as illustrated above).
Description	Add a more detailed description for the menu.
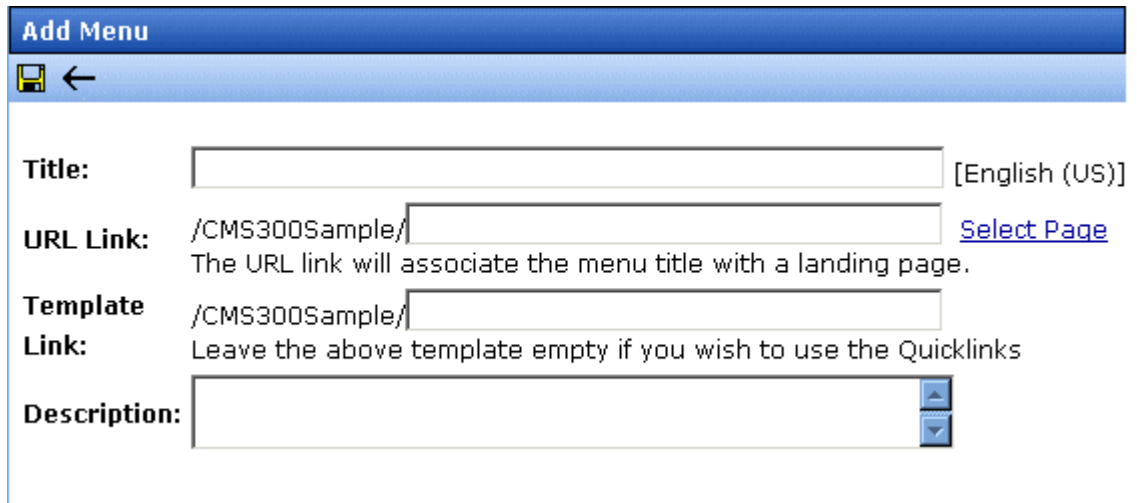
6. Click the Save button (💾).

With the menu added, you may assign menu items to it. See "Adding a Menu Item" on page 146.

Adding a Menu via the Menus Module

See Also: "Adding a New Menu" on page 142

1. From the left frame of the Workarea, click **Modules > Menus**.

2. Click the Add Menu button ().

3. The Add Menu screen appears.

Add Menu

Title:		[English (US)]
URL Link:	/CMS300Sample/	Select Page
	The URL link will associate the menu title with a landing page.	
Template Link:	/CMS300Sample/	
	Leave the above template empty if you wish to use the Quicklinks	
Description:		

4. To complete the fields on the Add Menu screen, see "Fields on the Add/Edit Menu Screen" on page 143.

With the menu added, you may assign menu items to it. See "Adding a Menu Item" on page 146.

Adding a Menu Item

Similar to being able to add, edit, view or delete a menu, Ektron CMS400.NET also allows you to add, edit, view and delete a menu item to a menu. *See Also:* "The Structure of Menus and Menu Items" on page 140

Adding a Menu Item via Content Folder

To add a menu item via a content folder, follow these steps.

1. Navigate to the content folder that contains the menu to which you want to add items.

2. Click the menu that you want to add items to.

3. In the View Language dropdown list, select the language of the menu.

4. Click the Add Item button ().

5. The Add Menu screen opens, displaying a list of items that can be added to the menu.

6. Use the table below to select the type of menu item and follow the steps to add that menu item.

Assign this type of content to the menu	For details, see
Content block	"Adding a Content Block as a Menu Item" on page 149
Any library asset: images, files, quicklinks, hyperlinks to the menu	"Adding a Library Asset as a Menu Item" on page 149
External hyperlink	"Adding an External Hyperlink as a Menu Item" on page 150
Submenu to the main menu	"Adding a Submenu as a Menu Item" on page 151

Adding a Menu Item via Menus Module

To add a menu item via the menus module, follow these steps.

1. From the left frame of the Workarea, click **Modules > Menus**.
2. Click the menu that you want to add a menu item to.
3. In the View Language dropdown list, select the language of the menu.
4. Click the Add Item button (➕).
5. The Add Menu screen displays a list of items that you can add to the menu.
6. Use to the table below to select the type of menu item and follow the steps to add that menu item.

Menu item type	For more information, see
Content blocks	"Adding a Content Block as a Menu Item" on page 149
Any library assets: images, files, quicklinks, hyperlinks to the menu	"Adding a Library Asset as a Menu Item" on page 149

Menu item type	For more information, see
External hyperlinks	"Adding an External Hyperlink as a Menu Item" on page 150
Submenus to the main menu	"Adding a Submenu as a Menu Item" on page 151

Adding a Menu Item via Navigation Link on a Web Page

1. Access the Web page that contains the link to display the menu.

2. Place the mouse on the hyperlink that causes the menu to appear.

3. The menu appears.

4. Click **Edit Menu**.

5. In the View Language dropdown list, select the language of the menu.

6. Click the Add Item button (⬛).

7. The Add Menu screen displays a list of items you can add to the menu.

8. Use to the table below to select the type of menu item and follow the steps to add that menu item.

Assign this type of content to the menu	For details, see
Content blocks	"Adding a Content Block as a Menu Item" on page 149
Any library assets: images, files, quicklinks, hyperlinks to the menu	"Adding a Library Asset as a Menu Item" on page 149

Assign this type of content to the menu	For details, see
External hyperlinks	"Adding an External Hyperlink as a Menu Item" on page 150
Submenus to the main menu	"Adding a Submenu as a Menu Item" on page 151

Adding a Content Block as a Menu Item

To add a content block as a menu item, follow these steps.

1. Follow the directions in "Adding a Menu Item via Content Folder" on page 146, "Adding a Menu Item via Menus Module" on page 147, or "Adding a Menu Item via Navigation Link on a Web Page" on page 148.

    You can only add content blocks that reside in the menu's content folder or its subfolders.

2. Click the radio button next to **Content Block**.

3. Click the **Next...** button.

4. The Add New item screen appears, listing all content blocks in the folder (and its subfolders) in which you created the menu.

    Click any folder to display its content blocks.

5. Check all content blocks you want to add to the menu.

6. Click the Add Item button ( ).

7. The View Menu screen reappears.

Adding a Library Asset as a Menu Item

To add a library asset as a menu item via a content folder or menus module, follow these steps.

1. Follow the directions in "Adding a Menu Item via Content Folder" on page 146, "Adding a Menu Item via Menus Module" on page 147, or "Adding a Menu Item via Navigation Link on a Web Page" on page 148.

2. Click the radio button next to **Library Asset** option.

3. Click the **Next** button.

4. The Library for Application Administrator screen opens.

5. Expand the library folder and navigate to the folder whose assets you want to add.

6. From the right frame, click the type of asset to insert (image, hyperlink, etc.).

To insert assets, the menu's folder must contain library assets. However, you can insert library assets from other folders for which you have permission.

7. Select a library asset and click the Insert button (🔃).

8. The Add New Item screen appears. Use the following table to complete that screen.

Name	Description
Title	Title of the Library asset. When you insert the asset, the title is used for the title of the menu item. You can change it if needed.
Browse Library	If you want to insert a different asset, click the **Browse Library...** button to browse the Library and select another asset.

9. Click the Save button (💾).

Adding an External Hyperlink as a Menu Item

To add an external hyperlink as a menu item via a content folder or menus module, follow these steps.

1. Follow the directions in "Adding a Menu Item via Content Folder" on page 146, "Adding a Menu Item via Menus Module" on page 147, or "Adding a Menu Item via Navigation Link on a Web Page" on page 148.

2. Click the radio button next to **External Hyperlink**.

3. Click the **Next** button.

4. The Add New Item screen is displayed.

5. Enter the title and URL link for the external hyperlink.

Name	Description
Title	Title of the new external hyperlink menu item.
URL Link	The URL link for the external hyperlink. For example, www.google.com.

6. Click the Save button (💾).

NOTE   When adding an External Hyperlink menu item, the URL does not get added to the library nor is an ID assigned to it. So, when you save the menu item, it is not added to the CMS database nor can it be retrieved for future use.

Adding a Submenu as a Menu Item

To add a submenu as a menu item via content folder or menus module, follow these steps.

1. Follow the directions in ”Adding a Menu Item via Content Folder” on page 146, ”Adding a Menu Item via Menus Module” on page 147, or ”Adding a Menu Item via Navigation Link on a Web Page” on page 148.

2. Click the radio button next to **Submenu**.

3. The Add Menu screen is displayed.

4. Complete the fields using ”Fields on the Add/Edit Menu Screen” on page 143 as a reference.

5. Click the Save button (💾).

Adding an Item to a Submenu

1. From the left frame of the Workarea, click **Modules > Menus**.

2. Select the menu.

3. Find the submenu to which you want to add items.
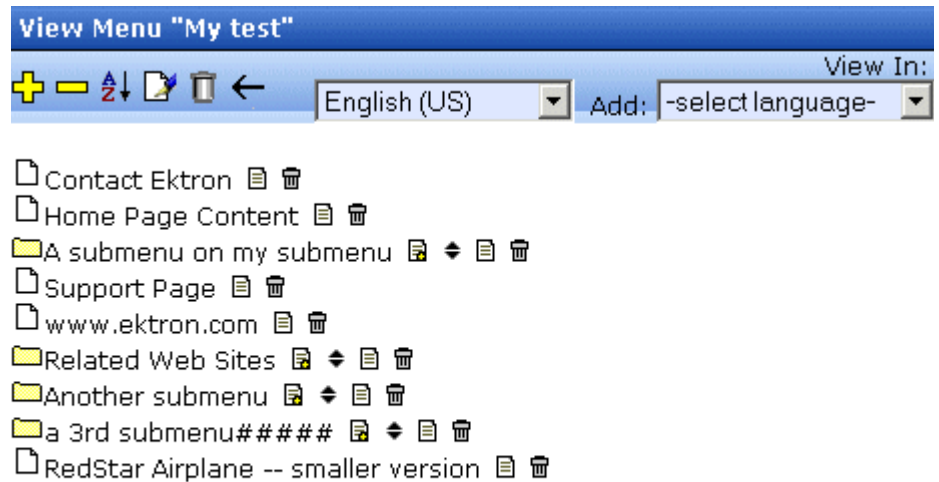
More Info

4. Click the Add Item icon (▤) next to the submenu.

5. The Add Menu screen opens, displaying items you can add.

6. Refer to the table below for selecting a menu item and follow the steps to add it.

Assign this type of content to the menu	For details, see
Content block	”Adding a Content Block as a Menu Item” on page 149
Any library asset: images, files, quicklinks, hyperlinks to the menu	”Adding a Library Asset as a Menu Item” on page 149
External hyperlink	”Adding an External Hyperlink as a Menu Item” on page 150
Submenu to the main menu	”Adding a Submenu as a Menu Item” on page 151

Adding a New Content Block to a Menu via Navigation Link on a Web Page

To add a new content block to a menu via a navigation link on a Web page, follow these steps.

1. Access the Web page that contains the link to display the menu.

2. Place the mouse on the hyperlink that causes the menu to appear.

3. The menu appears.

RC Cars	▶
RC Planes	▶
Products Page	
Visit Ektron.com	
🗋 Add Content	
🗋 Edit Menu	

4. Click (🗋) **Add Content**.

NOTE: The Add Content option lets you add only a new content block to a menu. You cannot add another type of menu item using this button.

5. A screen displays the name of the current folder and its subfolders. To create the new content in the current folder, click **Next**. To create it in subfolder, click it.

6. The Add Content screen opens, allowing you to enter information. Enter all information in the Add Content screen and click the **Publish** button. *See Also:* "Adding a Content Block" on page 36

7. The content block is added to the menu.

Editing a Menu

You can edit a menu via:

- its content folder

- menus module
- navigation link on a Web page

This section describes each option.

Editing a Menu via its Content Folder

To edit a menu from a content folder, follow these steps.

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 163.

2. Click the Edit button ( ).

3. The Edit Menu screen is displayed.

4. As necessary, change the fields in Edit Menu screen by referencing "Fields on the Add/Edit Menu Screen" on page 143.

5. Click the Save button ( ).

Editing a Menu via Menus Module

To edit a menu via the Menus Module, follow these steps.

1. Access the View Menu screen, as described in "Viewing a Menu via the Menus Module" on page 166.

2. Click the Edit button ( ).

3. The Edit Menu screen is displayed.

4. As necessary, update the fields in Edit Menu screen by referencing "Fields on the Add/Edit Menu Screen" on page 143.

5. Click the Save button ( ).

Editing a Menu via Navigation Link on a Web Page

To edit a menu via a navigation link on a Web page, follow these steps.

1. Navigate to the Web page that contains the link to display the menu.

2. Click the menu link.

3. The menu appears.

RC Cars	▶
RC Planes	▶
Products Page	
Visit Ektron.com	
🗋 Add Content	
🗋 Edit Menu	

4. Click the **Edit** option.

5. The View Menu screen for the menu appears.

6. Click the Edit button (🗋).

7. The Edit Menu screen is displayed.

8. As necessary, update the fields by referencing "Fields on the Add/Edit Menu Screen" on page 143.

9. Click the Save button (💾).

Editing a Menu Item

You can edit a menu item via:

- its content folder
- menus module
- navigation link on a Web page

Editing a Menu Item via its Content Folder

To edit a menu item from its content folder, follow these steps.

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 163.

2. Click the menu you want to edit.

3. The View Menu screen for that menu appears, listing all menu items.
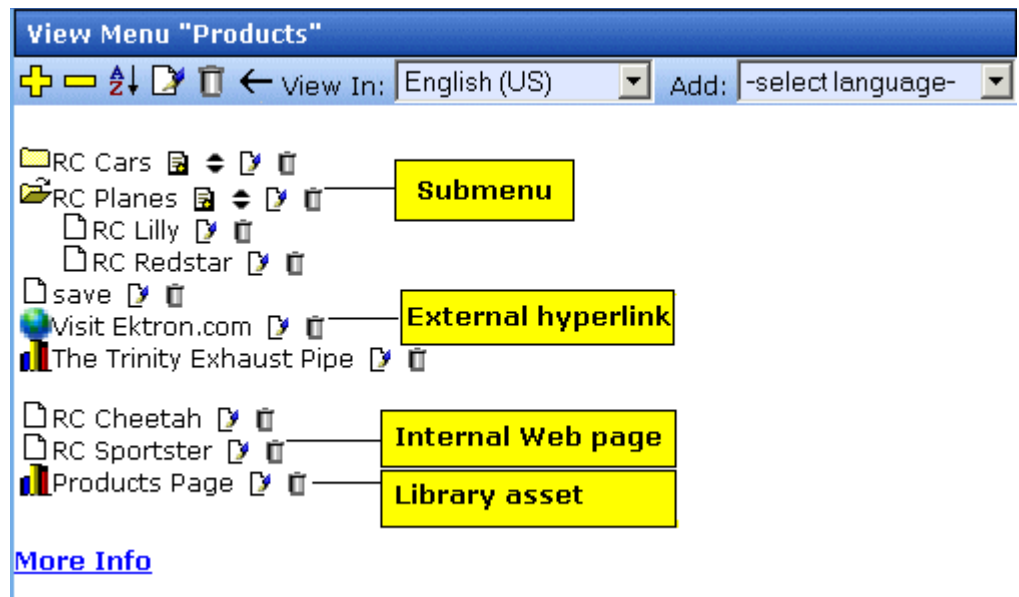
Editing a Menu via the View Menu Screen

The following icons indicate the type of each menu item and the options you can perform on them.

Icon	Menu item type	Available actions	For more information, see
📁	Submenu	Add submenu item (🖿)	"Adding an Item to a Submenu" on page 151
		Reorder submenu items (⬍)	"Reordering Submenu Items" on page 168
		Edit submenu (📝)	"Fields on the Add/Edit Menu Screen" on page 143
		Delete submenu (🗑)	"Deleting a Submenu" on page 169

Icon	Menu item type	Available actions	For more information, see
▯	Web page on your site	Edit Web page on your site (▯)	"Editing a Content Block Menu Item" on page 159
		Delete Web page on your site (▯)	"Removing a Menu Item via its Content Folder" on page 170
●	External Web page	Edit external Web page (▯)	"Editing an External Hyperlink Menu Item" on page 161
		Delete External Web page(▯)	"Removing a Menu Item via its Content Folder" on page 170
▯	Library asset	Edit library asset (▯)	"Editing a Library Asset Menu Item" on page 161
		Delete library asset (▯)	"Removing a Menu Item via its Content Folder" on page 170

Editing a Menu Item via Menus Module

To edit a menu via the Menus module, follow these steps.

1. Access the Menu Report screen, as described in "Viewing a Menu via the Menus Module" on page 166.
2. Click the menu you want to edit.
3. The View Menu screen for that menu appears, listing all items on the menu. The following icons indicate the type of each menu item.

Icon	Menu item type	Available actions	For more information, see
📁	Submenu	Add submenu item (▯)	"Adding an Item to a Submenu" on page 151

Icon	Menu item type	Available actions	For more information, see
		Reorder submenu items (⬦)	"Reordering Submenu Items" on page 168
		Edit submenu (📝)	"Fields on the Add/Edit Menu Screen" on page 143
		Delete submenu (🗑)	"Deleting a Submenu" on page 169
📄	Web page on your site	Edit Web page on your site (📝)	"Editing a Content Block Menu Item" on page 159
		Delete Web page on your site (🗑)	"Removing a Menu Item via Menus Module" on page 171
🌐	External Web page	Edit external Web page (📝)	"Editing an External Hyperlink Menu Item" on page 161
		Delete External Web page(🗑)	"Removing a Menu Item via Menus Module" on page 171
📚	Library asset	Edit library asset (📝)	"Editing a Library Asset Menu Item" on page 161
		Delete library asset (🗑)	"Removing a Menu Item via Menus Module" on page 171

Editing a Menu via Navigation Link on a Web Page

To edit a menu via navigation link on a Web page, follow these steps.

1. Access the template where you inserted the link to display the menu.

2. Click the **Menu Navigation link** title on the Web page.

3. A DHTML menu is displayed along with all menu items on the menu.

RC Cars	▶
RC Planes	▶
Products Page	
Visit Ektron.com	
🗋 Add Content	
🗋 Edit Menu	

4. Click **Edit Menu**.

5. The Edit Menu Item screen appears.

6. See "Editing a Menu via the View Menu Screen" on page 156.

Editing Types of Menu Items

This section explains how to edit the following types of menu items:

- content block on your Web site
- library asset
- link to an external Web site
- submenu

Editing a Content Block Menu Item

To edit a content block menu item via its content folder or menus module, follow these steps.

1. Navigate to the menu you want to edit by referencing "Viewing a Menu" on page 162.

2. The View Menu screen displays the menu items.

3. Click the edit icon (🗋) next to the content block (🗋) you want to edit.

4. The Edit Menu Item screen opens.

Edit Menu Item

Title: `save`

Description:

Target: ○ Popup ● Self ○ Parent ○ Top

Link: ● QuickLink ○ Menu Template

5. Using the table below as a reference, make changes to the content menu item.

Fields on the Edit Menu Item Screen

Field	Description
Title	The name that was given to the menu item by the creator. Edit if needed.
Description	Add a more detailed description for the content menu item that is being edited.
Target	Select how the library menu item will display. • Popup: Opens in a new browser window • Self: Opens in the same window • Parent: Opens in the parent window • Top: Note: By default, the target option is set to self.
Link	See "Template Link" on page 145

6. Click the Save button (🖫).

Editing a Library Asset Menu Item

To edit a library menu asset via its content folder or menus module, follow these steps.

1. Navigate to the menu whose items you want to edit by referencing .

2. The View Menu screen displays the menu items.

3. Click the edit icon ( ) next to the library asset ( ) you want to edit.

4. The Edit Menu Item screen opens.

5. Make changes to the library asset menu item. For documentation of the fields, see .

6. Click the Save button ( ).

Editing an External Hyperlink Menu Item

To edit an external hyperlink menu item via its content folder or menus module, follow these steps.

1. Navigate to the menu that you want to edit by referencing .

2. The View Menu screen displays the menu items.

3. Click the edit icon ( ) next to the external hyperlink ( ) you want to edit.

4. The Edit Menu Item screen opens. Update as needed. Use the table below to guide you through the fields.

.

Name	Description
Title	Title of the new external hyperlink menu item.
URL Link	The URL link for the external hyperlink. For example, www.google.com.
Description	Enter a description for the hyperlink.

Name	Description
Target	Select how the library menu item will display. • Popup: Opens in a new browser window • Self: Opens in the same window • Parent: Opens in the parent window • Top: Note: By default, the target option is set to self.

5. Click the Save button (🖫).

Editing a Submenu Menu Item

To edit a submenu menu item via its content folder or menus module, follow these steps.

1. Navigate to the menu for which you want to edit the menu items for by referencing to "Viewing a Menu" on page 162.

2. The View Menu screen opens, displaying a list of all menu items.

3. Click the submenu icon (🗀) to display its contents.

To edit a	See this section
Content block	"Editing a Content Block Menu Item" on page 159
Library Asset	"Editing a Library Asset Menu Item" on page 161
External Hyperlink	"Editing an External Hyperlink Menu Item" on page 161
Submenu	"Fields on the Add/Edit Menu Screen" on page 143

Viewing a Menu

Just like editing an existing menu, you can view a menu via:
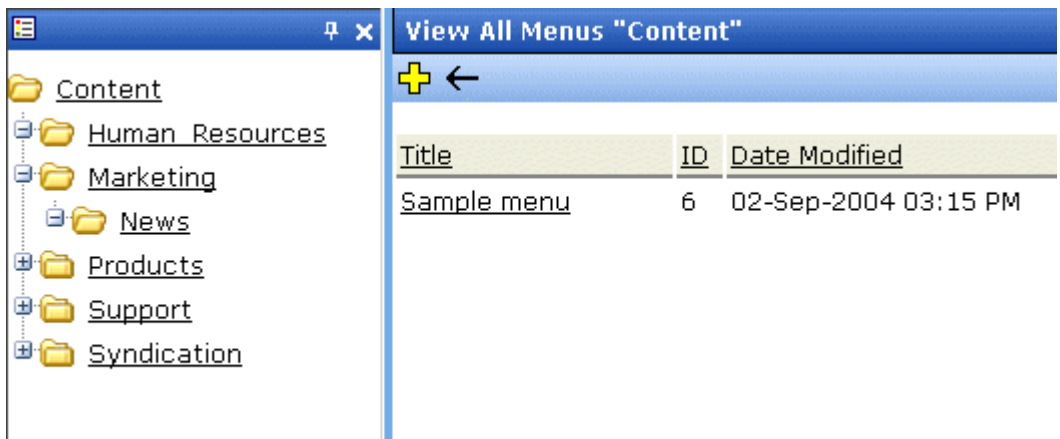
- its content folder
- menus module
- navigation link on a Web page

When viewing a menu via the content or menu folder, you get an *internal* view of information entered by menu creator. When viewing via a navigation link on a Web page, you get an *external* view of the menu, as seen by anyone navigating Web site.

View a Menu via its Content Folder

To access a menu via its content folder, follow these steps.

1. Access the Workarea and navigate to the content folder that contains the menu.

2. Click the View Menu button (🗐).

3. The View All Menus screen displays a list of menus under that folder.

4. Click the menu you want to view.

5. Click **More Info** to view the details about the menu.

6. The following table explains the information on the View Menus screen.

Name	Description
Information about menu items	See "Editing a Menu Item via its Content Folder" on page 155

Name	Description
Title	Title assigned to the menu folder.
ID	Content ID # that is assigned to the menu by Ektron CMS400.NET. Note: The ID for the Menu is automatically generated by the 400 application when you create a menu.
Language ID	The decimal number representing the menu's language.
Path	Path to the content folder where the menu resides.
Last User to Edit	Last user to edit this menu.
Last Edit Date	Date and time when this menu was last edited.
Date Created	Date and time when this menu was created.
Description	Description given to the menu.

The View Menu screen also provides the following buttons.
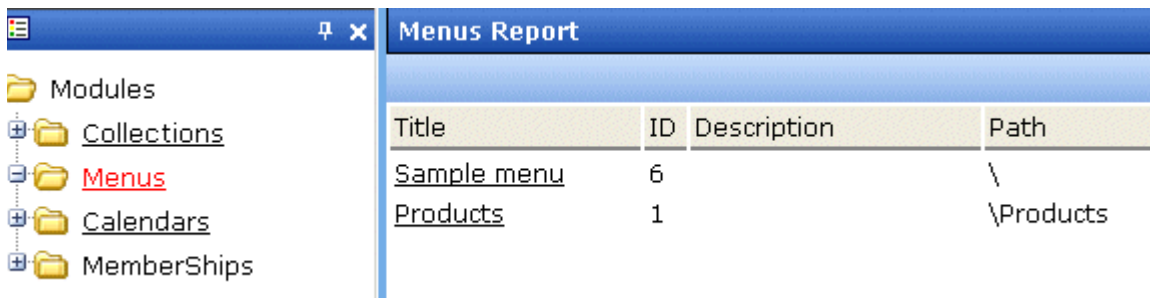
Button	Name	Description	More Information
➕	Add Menu Item	Add item to menu	"Adding a Menu Item" on page 146
➖	Remove Menu Item	Remove item from the menu	"Deleting a Menu Item" on page 170
↓	Reorder Menu Item	Adjust sequence of menu items	"Reordering Menu Items" on page 167
📝	Edit Menu	Edit existing menu	"Editing a Menu" on page 153
🗑	Delete Menu	Delete menu and its menu items	"Deleting a Menu" on page 168

Button	Name	Description	More Information
←	Back	Return to previous screen	

Viewing a Menu via the Menus Module

To access the menu via the Modules folder, follow these steps.

1. Click the **Modules** folder from the left frame of the Workarea.
2. Click the **Modules** folder again to expand its hierarchy.
3. Click **Menus** from the folder hierarchy to view its content.
4. The Menus Report screen displays all menus.

5. Continue from the section "Click the menu you want to view." on page 163.

View Menus via Navigation Link on a Web Page

To access the menu via a navigation link on a Web page, follow these steps.

1. Access the Web page on which your Web developer inserted the link to display the menu.
2. Click the link that launches the menu on the Web page.

3. A DHTML menu is displayed along with all menu items on the menu.

RC Cars	▶
RC Planes	▶
Products Page	
Visit Ektron.com	
📄 Add Content	
📝 Edit Menu	

For information on how to display a menu on a Web page, refer to the section on "Multi-Level Collection" of the Developers Manual.

Reordering Menu Items

To rearrange the items on a menu, follow these steps.

1. Navigate to the menu that you want to rearrange. See "Viewing a Menu" on page 162.

2. Click the Reorder button (🔼).

3. The Reorder Items screen appears.

Reorder Items "Products"

💾 ←

First
| RC Cars |
| RC Planes |
| save |
| Visit Ektron.com |
| The Trinity Exhaust Pipe |
| RC Cheetah |
| RC Sportster |
| Products Page |
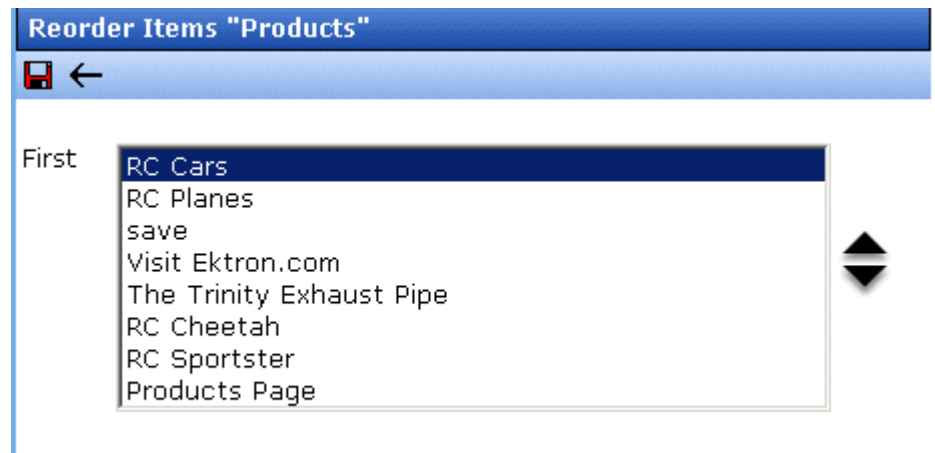
4. Click the item you want to move.

5. Click the up arrow to move it up, or the down arrow to move it down.

6. When done moving items, click the Save button (💾).

Reordering Submenu Items

Use this procedure to rearrange the items on a submenu.

1. Navigate to the menu that you want to reorder by referencing to "Viewing a Menu" on page 162.

2. The View Menu screen opens, displaying a list of all menu items.

3. Next to the submenu that you want to reorder, click the Reorder button (⬍).

4. The Reorder Items screen appears.
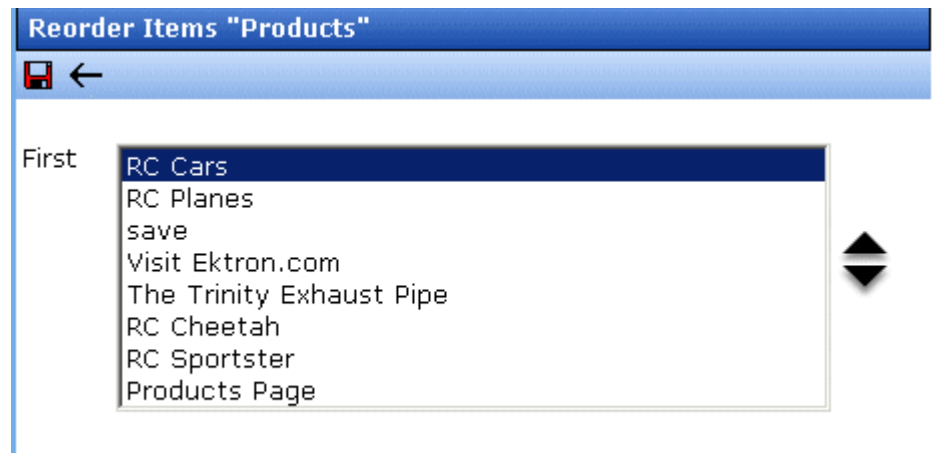
5. Click the item you want to move.

6. Click the up arrow to move it up, or the down arrow to move it down.

7. When done moving items, click the Save button (🖫).

Deleting a Menu

Similar to editing and viewing a menu, you can delete a menu via

• its content folder

• menus module

You cannot delete a menu from the navigation link on a Web page.

Deleting a Menu via Content Folder

To delete a menu via its content folder, follow these steps.

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 163.

2. Click the Delete button (🗑).

3. A confirmation message is displayed.

4. Click **OK** to delete the menu.

NOTE   Deleting a menu automatically deletes all menu items associated with it. Do not confuse, however, the menu link with the item itself. For example, deleting a menu deletes its *links* to content blocks but has no affect on the content blocks.

Deleting a Menu via Menus Module

To delete a menu via its menus module, follow these steps.

1. Access the View Menu screen, as described in "Viewing a Menu via the Menus Module" on page 166.

2. Click the Delete button (🗑).

3. A confirmation message is displayed.

4. Click **OK**.

NOTE: Deleting a menu automatically deletes all menu items associated with it. Do not confuse, however, the menu link with the item itself. For example, deleting a menu deletes its *links* to content blocks but has no affect on the content blocks.

Deleting a Submenu

1. Access the View Menu page, as described in "Viewing a Menu via the Menus Module" on page 166.

2. Select the submenu.

3. Click the delete icon (🗑) to the right of the submenu (surrounded in red in graphic below).
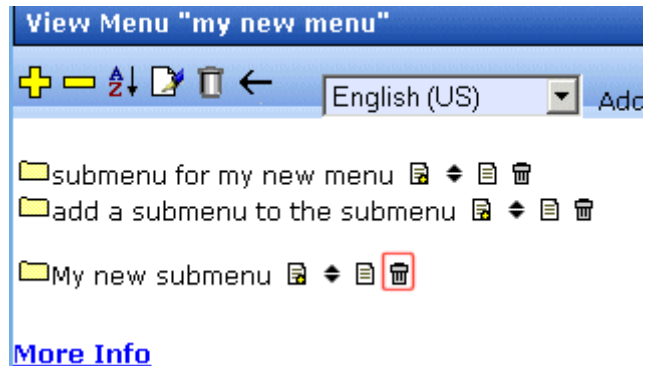
Deleting a Menu Item

Similar to editing and viewing a menu, one can remove a menu item from a menu via

- its content folder
- its menu folder

Removing a Menu Item via its Content Folder

You can delete any menu item by clicking the accompanying Delete icon (🛍) on the View menu screen.

Alternatively, you can follow these steps. The procedure below is quicker if you are deleting several or all items at once.

1. Access the View Menu screen, as described in "View a Menu via its Content Folder" on page 163.
2. Click the menu you want to delete.
3. The View Menu screen for that menu is displayed.
4. Click the Remove button (➖).
5. The Delete Menu Item screen opens.
6. Click the check box next to the menu item you want to delete.

   You can click **Select All** to choose all menu items. Click **Clear All** to unselect all menu items.
7. Click the Delete button (🛍).

Removing a Menu Item via Menus Module

You can delete any menu item by clicking the accompanying Delete icon (🗑) on the View menu screen.

Alternatively, you can follow these steps. The procedure below is quicker if you are deleting several or all items at once.

1. Access the View Menu screen, as described in "Viewing a Menu via the Menus Module" on page 166.

2. Click the Remove button (▭).

3. The Delete Menu Item screen opens.

4. Click the checkbox next to the menu item you want to delete. You can click **Select All** to choose all menu items delete. Click **Clear All** to unselect all menu items.

5. Click the Delete button (🗑).

Working with Menus in a Multi-Language System

> **NOTE** For background information about supporting multiple languages on your Web site, see the **Ektron CMS400.NET** Administrator manual section "Multi-Language Support" > "Working with Multi-Language Content."

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 add new items to it.

Translating a Menu

To translate a menu into any supported language, follow these steps. You can navigate to the menu via the Web site or from the Workarea. Each procedure is described below.

By Navigating the Site

1. Sign on to **Ektron CMS400.NET** and select the language in which the menu currently exists.

2. Navigate to the page that has the menu you want to translate.

3. Click the menu and the **Edit Menu** option.
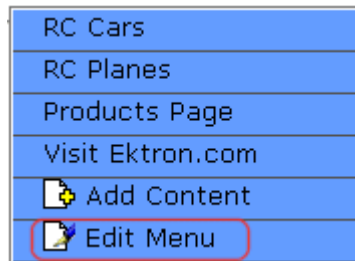
4. The View Menu screen appears for the selected menu.

5. From the Add drop-down list, select the language into which you want to translate the menu.
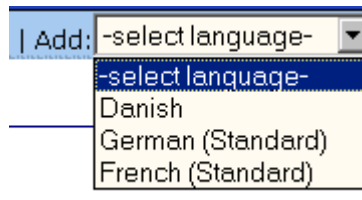
6. The Add Menu screen appears. Complete the screen for the menu in the selected language. See "Fields on the Add/Edit Menu Screen" on page 143.

7. Click the Save button ( ).

8. The View Menu screen reappears. Now, the **View In** drop-down list displays the menu's new language.
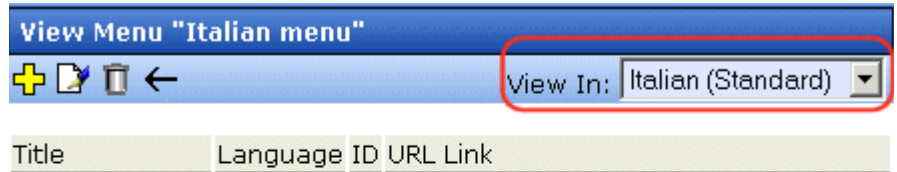
9. Add items to the menu. See "Adding a Menu Item" on page 146. If adding a content block, you can only insert one in the selected language.

10. Later, you can add more menu items, edit them, delete them, view them, etc. These capabilities are described in this chapter.

By Accessing the Menus Report Screen

1. From the Workarea screen, click **Modules > Menus**.

2. Click the menu you want to translate.

3. Follow the instructions from Step 3 in "By Navigating the Site" on page 172.

Creating a Menu in Any Language

To create a menu in any language, follow these steps.

1. Form the Workarea screen, click **Modules > Menus**.

2. From the language drop-down list, select the new menu's language.
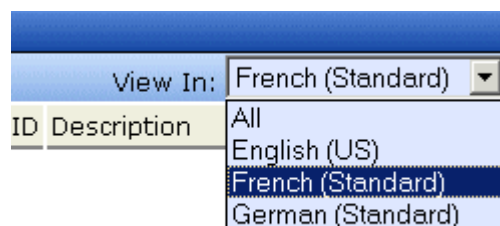
3. Create the menu. See "Adding a New Menu" on page 142.

Working with Calendars

Calendars in **Ektron CMS400.NET** perform the same function as a paper calendar: they keep one or more users informed about upcoming events. However, they can be shared with all visitors to your Web site, and any authorized user can add events to a calendar.

Typical calendar events could include

- company meeting
- reserving a conference room for an interview
- company holidays
- deadlines

These are only a few uses of calendar events. Calendars are very versatile and can easily meet all of your needs. A sample calendar appears below.

Understanding Calendars

Before working with calendars, you should understand the following key points.

- **Ektron CMS400.NET** supports several calendars at one time. There might be a site-wide calendar, and other calendars for special interests, such as an athletic events calendar.

- A calendar displays one month at a time. Each date in the month can display several events.

- Only system administrators can create a calendar.

- Each calendar is assigned to a content folder (*See Also:* "Working with Folders and Content Blocks" on page 25). Your ability to view, add, edit, and remove calendar events is determined by your permissions for the folder.

- The following illustrates the workflow of calendar tasks.
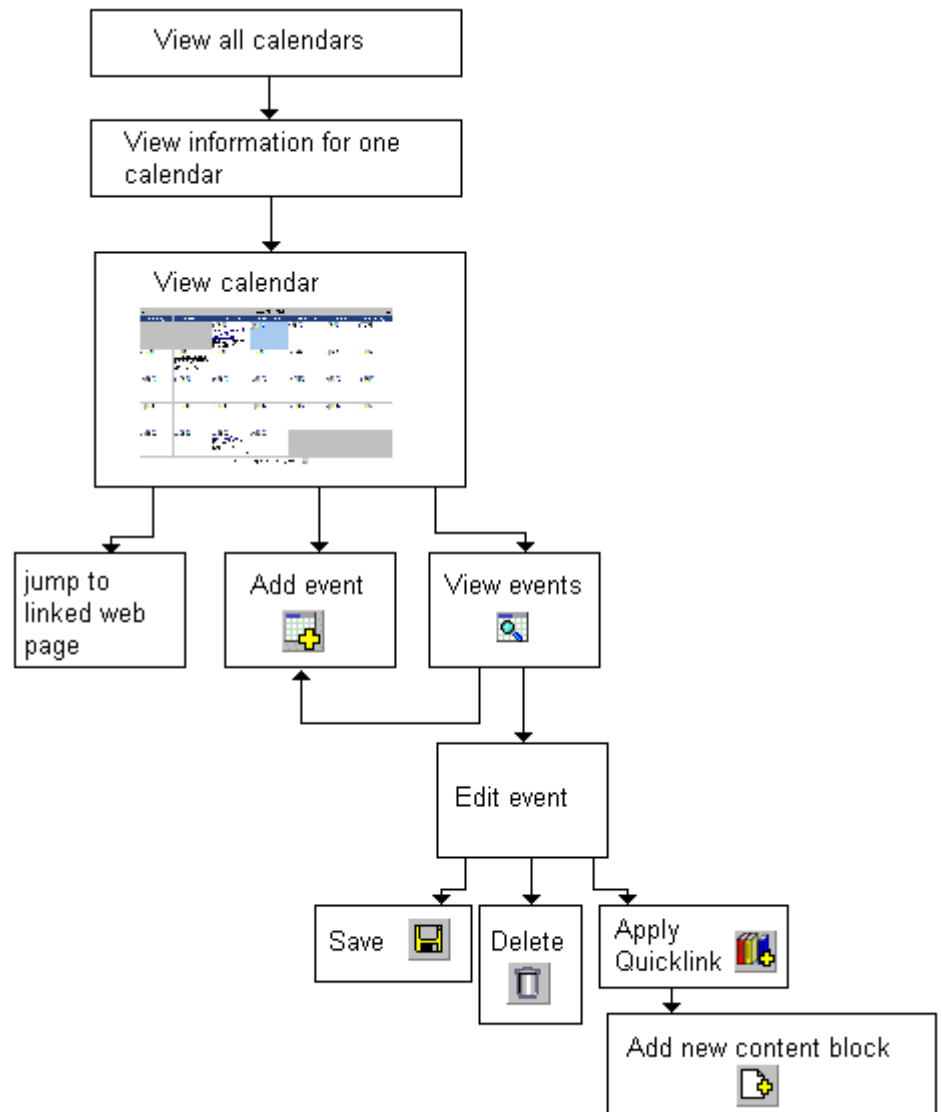
Understanding Event Types

Your system administrator can set up types of calendar events. For a personal or workgroup calendar, examples might be staff meetings, employment interviews, conference calls, etc. For an educational institution, examples might be academic deadlines, sporting events, and tuition due dates.

If you assign a type to an event while creating it, you can later
display only events of that type. This feature lets you temporarily
suppress unwanted events. As a result, the calendar display is
cleaner, because it only shows relevant information.

Organization of this Chapter

This chapter explains all of the tasks you can perform with
calendars through the following subtopics.

- "Accessing the List of Calendars" on page 178
- "Viewing a Calendar" on page 182
- "Adding a Calendar Event" on page 183
- "Adding a Calendar Event" on page 183
- "Adding a New Content Block for a Calendar Event" on page 189
- "Editing Calendar Events" on page 193
- "Deleting Calendar Events" on page 195

Accessing the List of Calendars

To access the calendar screen, follow these steps.

1. Access the **Modules** folder from the lower left corner of the
   Workarea.

2. Click the **Calendars** folder.
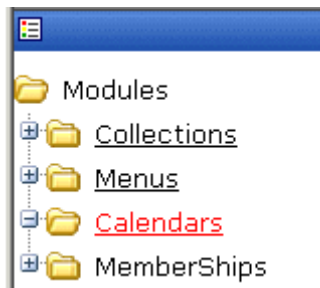
3. The Calendar Modules screen appears. It lists all calendars
   currently in the system.

Calendar modules

Title	ID	Description	Path
RC International Calendar	1	listing of events for RC International news events	\

> **NOTE**   Only system administrators can create a new calendar.

4. Click a calendar.

5. The View Calendar screen appears, showing information about the selected calendar.
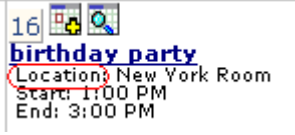
The following table explains the fields on the View Calendar screen.

Field	Description
Title	Title given to the calendar.
ID	ID number automatically assigned to calendar. This is used to display the calendar on a Web page.
Description	Description given to the calendar.

Field	Description
Location Label	Label for the calendar's location information. This label appears on the calendar when a location is assigned to a calendar event. 16 🔲 🔍 **birthday party** (Location) New York Room Start: 1:00 PM End: 3:00 PM
Start Time Label	Label for the calendar's start time. This appears on the calendar when a start time is assigned to a calendar event.
End Time Label	Label for the calendar's end time data. This appears on the calendar when an end time is assigned to a calendar event.
Cell Height	Height of cells in the calendar. Helps determine the size of each calendar date's block.
Cell Width	Width of cells in the calendar. Helps determine the size of each calendar date's block.
Display Weekends	A green check (✔) means the calendar displays weekends. A red X (✘) means the calendar does not.
Event Types Event Type Event Types Available Event Types Required	Indicates if event types are assigned to this calendar. *See Also:* "Understanding Event Types" on page 177
Folder Name	Name of content folder to which the calendar is assigned for permission purposes. You can only add, edit or delete events for calendars in folders to which you have been granted permissions.
Folder Path	Complete path to the calendar's content folder.

The view calendar screen may contain the following toolbar buttons that let you perform other tasks.

Button	Name	Description	More Information
31	View Calendar	Shows calendar in the Workarea.	"Viewing a Calendar" on page 182

Button	Name	Description	More Information
←	Back	Return to previous screen.	
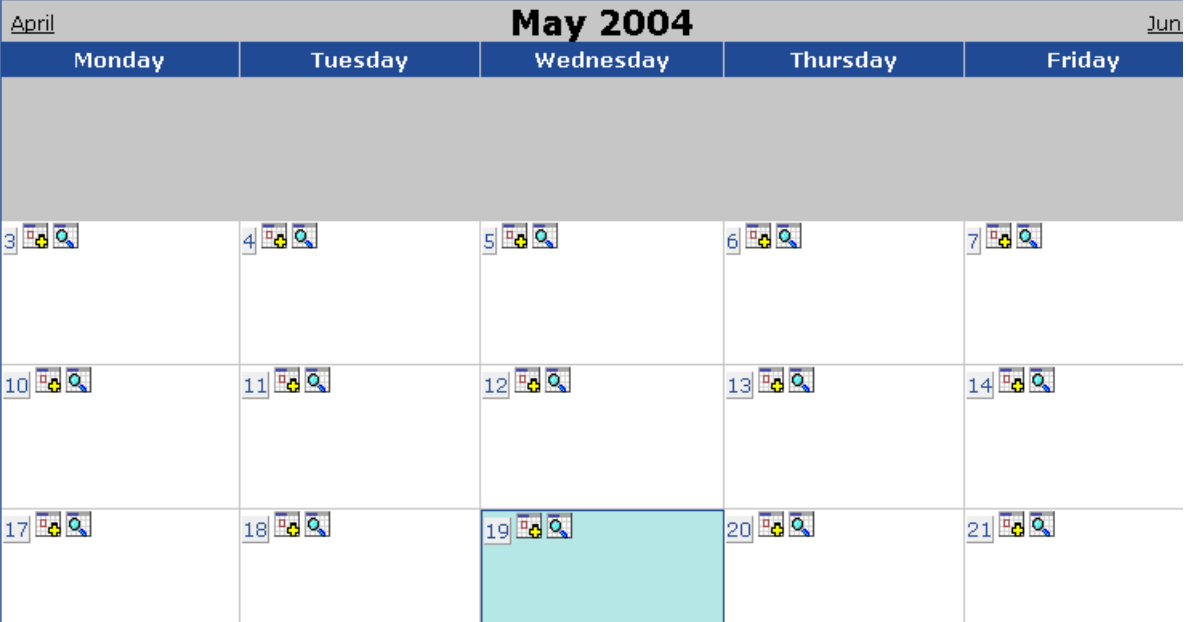
Viewing a Calendar

To view a calendar, follow these steps.

1. Access the View Calendar screen for the calendar you want to see, as described in "Accessing the List of Calendars" on page 178.

2. Click the View Calendar (31) button.

3. The calendar appears.

Show Calendar

←

April		**May 2004**		Jun
Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21

4. If you want to view only events of a certain type, click the **Filter by Event Type** drop-down list (illustrated below). Then, choose an event type. *See Also:* "Understanding Event Types" on page 177
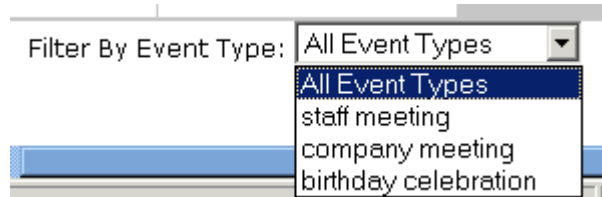
The page is refreshed, and the calendar only displays events of that type.

From here, you can perform the following tasks. Note that the Add and View buttons appear on each calendar day, while the Return button is on the toolbar at the top of the screen.

Click on	Action	More Information
	Add Calendar Event	"Adding a Calendar Event" on page 183
	View Calendar Events	"Adding a Calendar Event" on page 183
	Return to Previous Screen	Return to previous screen
Event title within calendar (sample below) **RC International Announces the RC Cheetah**	Jump to calendar event's Web page (if available)	

Adding a Calendar Event

NOTE   You can only add a calendar event if you have add permission for the folder to which the event is assigned.

To add a calendar event, follow these steps.

1. Access the calendar to which you want to add an event, as described in "Viewing a Calendar" on page 182.

2. Navigate to the month and day for which you want to add a calendar event. To move to the previous month, click its name in the top left corner (see illustration). To move to the next month, click its name in the top right corner.

3. Click the Add Event ( ) button.
4. The Add Calendar Event screen appears.

5. Respond to the fields using the following table as a reference.

Field	Description
Event Title	Enter a title for the calendar event.
Event Location	If desired, enter a location for the event (for example, Conference Room 1 or Cafeteria).

Field	Description
One Time/ Recurring	If you want to enter a one-time only event, continue reading. If you want to add a recurring event, see "Adding a Recurring Event" on page 187.
Date	Click the calendar button () to display a calendar. From it, select a start date.
Start Time	Enter a starting time for the event. You can enter as few characters as needed. For example, to specify one o'clock, you can enter 1.
End Time	Enter an ending time for the event.
Display times for the event	Check this box if you want the calendar to display the event's start and end times (illustrated below). **birthday party** Location: New York Room Start: 1:00 PM End: 3:00 PM
Hyperlink	You can link a Web page to this calendar event. The Web page could contain more information about the event, directions to it, etc. If you insert a hyperlink, when this event appears on the calendar, the reader can click the event to jump to that page. To enter any page on the internet, enter its Web address here. For example, `www.ektron.com`. To link to a content block on your Web site, click the library button ( ). (This type of link is known as a *quicklink*.) The Quicklinks dialog appears, and you can navigate to the content block. Note: You can add a new content block from the Quicklink dialog. See "Adding a New Content Block for a Calendar Event" on page 189
Make the Hyperlink Active	Check this box to activate the link assigned in the **Hyperlink** field. If you do, when a user views the calendar, he can click the event to "jump" to the specified Web page.
Launch link in a new browser	Check this box if you want the Web page specified in the **Hyperlink** field to appear in a new browser window when someone clicks it.

Field	Description
Event Types	Note: This field only appears if your system administrator has set up one or more event types for this event. *See Also:* "Understanding Event Types" on page 177
	To apply an event type to this event, click an Event Type from the right column. Then, click the Right Arrow (**>**) to move the event type to the **Selected** column.
	Repeat for each event type you want to assign to the event.

6. Click **Save** (💾).

Adding a Recurring Event

You can assign an event to occur multiple times on a calendar. To do so, follow these steps.

1. Add a calendar event (as described in "Adding a Calendar Event" on page 183) or edit one (as described in "Editing Calendar Events" on page 193).

2. Click the **Recurring** tab to assign the event for more than one day.

3. Refer to the table below to complete to the Recurring fields.

Field	Description
Start Date	Enter the date when the calendar event first appears.
End Date	Enter the date when the calendar event stops displaying.
Number of events to be created	(Display only field) The number of times the event will occur. This value changes as you modify the **Event Will Occur** field values, below.
Event will occur	Select the frequency of the event from among the choices.
Event times	Select the start and end times for the events.
Display the times for the event	Check this box if you want the calendar to display start and end times (illustrated below).

4. Finish your edits.

For documentation of	See
Hyperlink	"Hyperlink" on page 186
Make Hyperlink Active	"Make the Hyperlink Active" on page 186
Launch Link in New Browser	"Launch link in a new browser" on page 186
Event Types	"Event Types" on page 187

5. Click the Save button (🖫).

Adding a New Content Block for a Calendar Event

While adding a new event to a calendar, you can add a new content block to the Web site. You might use the content block to supply additional information about the event.

To do so, follow these steps.

1. Access the Add Calendar event screen, as described in "Adding a Calendar Event" on page 183.

2. The content folder tree, at the bottom of the Add Calendar Event screen, defaults to the calendar's content folder.

3. Navigate through the folder tree to the content folder that will store the new content block.

Add Calendar Event

Event Title

Event Location

| One Time | Recurring |

Date   4-May-2004

Start Time   12:00   AM

End Time   12:00   AM

☑ Display the times for the event

Hyperlink

☐ **Make the Hyperlink active**

☐ **Launch link in a new browser.**
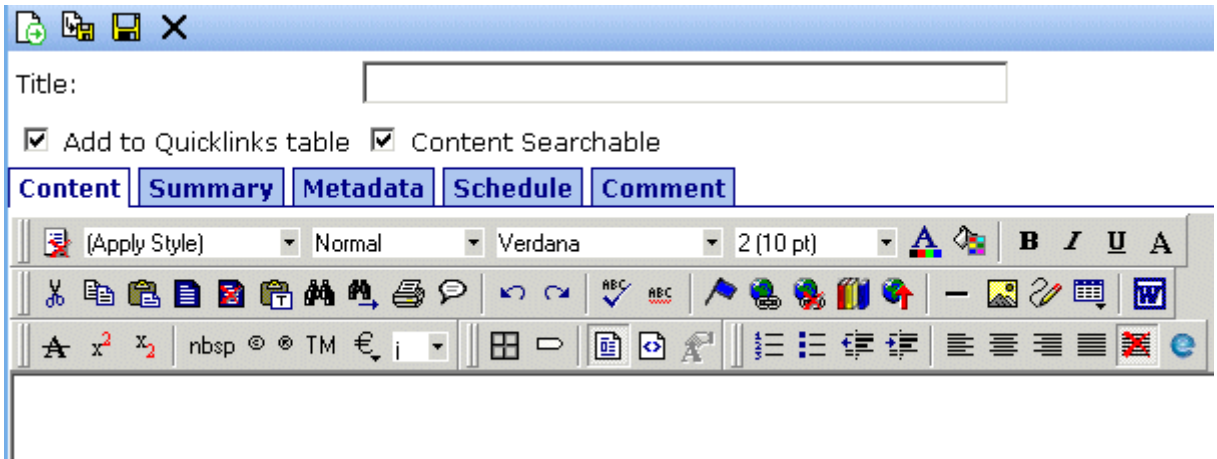
Root Folder   News

Folder Path   \Marketing\News

📁 ..

    📄 RC International Announces the RC Cheetah

    📄 RC International Hosts RC Conference

    📄 RC International Ships RC Sportster

    📄 test

4. Click the Add Content (📄) toolbar button.

5. The add new content screen appears.

6. Enter content into the new content block.

7. Click a workflow button from the toolbar at the top of the screen. For more information about creating a content block, see ”Adding a Content Block” on page 36.

8. The content is saved, the window closes, and the Add Calendar Event screen appears with the new content block added to the content tree.

9. Click the title of the new content block.

10. The **Event Title** and **Hyperlink** fields are populated with information about the selected content block.

11. Make changes to the displayed fields using the table described in "Respond to the fields using the following table as a reference." on page 185 as a reference.

12. Click the Save button (💾).

Viewing a Calendar Event

Once events are 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 "Viewing a Calendar" on page 182.

2. Place the cursor on the event you want to view.

April	**May 2004**			June
Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
3	4 **weekly meeting** Location: New York Room Start: 12:00 AM End: 1:00 PM	5	6	7
10	11 **weekly meeting** Location: New York Room Start: 12:00 AM End: 1:00 PM	12	13	14
17	18 **weekly meeting** Location: New York Room Start: 12:00 AM End: 1:00 PM	19	20	21
24	25 **weekly meeting** Location: New York Room Start: 12:00 AM End: 1:00 PM	26	27	28
31				

3. Click the View Date (🔍) button.

4. The View Events screen appears, listing all calendar events for that date. From this screen, you can perform the following functions:

   – Add a new event

   – View, edit, and delete an existing event

Editing Calendar Events

NOTE   You can only edit a calendar event if you have edit permission for the folder to which the calendar is assigned.

After a calendar event is added to 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 "Adding a Calendar Event" on page 183.

2. Click the event you want to edit.

3. The Edit Calendar Event screen appears.

Edit Calendar Event

Event Title weekly meeting

Event Location New York Room

One Time	Recurring

☑ Update all recurring events associated with this event.

Start Date: 4-May-2004   End Date: 15-Jun-2004
Number of Events: 0

Event will occur:
Every day
Every Tue
Every 4th of every Month
Every first Tue of every Month
Yearly, every 4th of Apr
Yearly, every first Tue of Apr

Event times:

Start: 12:00:00   AM ▾

End: 1:00:00   PM ▾

☑ Display the times for the event

Hyperlink

☐ **Make the Hyperlink active**

☐ **Launch link in a new browser**

Root Folder   News

Folder Path   \Marketing\News

..

RC International Announces the RC Cheetah

RC International Hosts RC Conference

RC International Ships RC Sportster

4. Update the fields using the table described in "Respond to the fields using the following table as a reference." on page 185 as a reference.

5. Click the Save button (💾).

Deleting Calendar Events

You can easily delete calendar events that are no longer needed, or do not belong to the calendar they were added to.

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 "Adding a Calendar Event" on page 183.
2. Click the event you want to delete.
3. The Edit Calendar Event screen appears.
4. Click the Delete button (🗑).
5. A confirmation message appears.
6. Click **OK**.

Managing Tasks

A task is a request from one user to another to perform an action within **Ektron CMS400.NET**. Examples of a tasks include:

- updating content
- publishing a content block
- updating an image
- reordering a collection

The Tasks folder displays all tasks that are either assigned to you or that you assigned to another user or user group. You can also assign tasks to yourself.

A task may or may not be related to a specific content block. If it is, you can access a content block then "attach" a task to it. This kind of task is managed just like the other tasks, but you can also view and update it via the attached content block. For more information, see "Viewing a Task" on page 204.

This chapter explains how to work with tasks through the following topics.

Creating a Task via the Task Folder

Accessing the Tasks Folder

To access the Tasks folder, follow these steps.

1. Access your Smart Desktop, as explained in "Understanding the Smart Desktop" on page 14.

2. The Smart Desktop folders appear in the top left frame.

3. Click the **Tasks** folder. The following subfolders appear:

- **Assigned To Me** - tasks assigned to you
- **Assigned By Me** - tasks you assigned to someone else
- **Created By Me** - tasks you created
- **Assigned To User** - search for tasks assigned to a user
- **Not Started** - tasks whose state is set to not started
- **Active** - tasks whose state is set to Active
- **Awaiting Data** - tasks whose state is set to Awaiting Data
- **On Hold** - tasks whose state is set to On Hold
- **Pending** - tasks whose state is set to Pending
- **Reopened** - tasks whose state is set to Reopened
- **Complete** - tasks whose state is set to Reopened

You can click any folder to view only tasks in that category.

Also, the View Tasks screen appears in the right frame, listing all tasks assigned to you, or assigned by you.

From this page, you can view, update, or add tasks. To learn more about the View Tasks screen, see "Viewing a Task" on page 204. **Creating the Task via the Task Folder**

See Also: "Task Module Toolbar" on page 214

To create a task, follow these steps.

1. Access your Tasks folder, as described in "Accessing the Tasks Folder" on page 197.

2. Click the Add button ( ).

3. The Add Task screen appears.

4. Enter information for the task using the following table.

Field	Description
Task Title	Enter a title for the task (for example, Update Content). The title appears in the left column of the View Tasks screen.

| Field	Description
Assigned To	Your user name appears.
	• If you do not have Redirect permissions, you cannot assign tasks to other users.
	• If you have Redirect permissions, your user name appears followed by **Select User or Group**. To assign the task to yourself, proceed to the next field. To assign the task to someone else, click **Select User or Group** and choose a user or group.
	When you complete the screen, an email is sent to the selected user or user group informing him of the assigned task.
	Email is only sent to the user or user group if email notification is enabled for **Ektron CMS400.NET**.
Language	Select the language of the user who will perform the task.
Content	If this task involves a content block, select it. When you click **Select**, a new window appears. From this window, you can navigate through folders to find the content block.
	You can only select a content block whose language matches the user language selected above.
	See Also: "Selecting a Content Block for the Task" on page 201
Priority	Select the priority of the task. Your choices are High, Normal and Low.
	The priority appears on the View Tasks screen. A user can sort tasks on the screen by priority .

Field	Description
State	Choose a status for the task. Your choices are: • Not Started • In Progress • Completed • Waiting on Someone else • Deferred If the task is not linked to a content block, you can assign it to any state. However, if you later link the task to a content block (via the **Content** link above), the state switches to Not Started. The state appears on the View Tasks screen. A user can sort tasks on the screen by state.
Start Date	Using the calendar button, choose a start date for the task. The start date appears on the View Tasks screen. A user can sort tasks on the screen by start date.
Due Date	Using the calendar button, choose the date by which the task needs to be completed. The due date appears on the View Tasks screen. A user can sort tasks on the screen by due date.

Field	Description
Description	Add additional information to describe the task. The description appears on the View Task screen (circled below). **View Task** **Task Title:** testing self assignment **Assigned To:** jedit **Assigned By:** jedit **Priority:** High **Status:** Completed **Due Date:** 23-Jun-2004 **Start Date:** 11-Jun-2004 **Description:** testing self assignment **Comments:** Date/Time Added By Comments

5.   Click the Save button (🖫).

6.   If email notification is enabled, an email is sent to the user/user group to which the task was assigned.

Selecting a Content Block for the Task

When you click **Select Content** from the Add Task screen, the Select Content screen appears. It shows only content blocks in the selected language.
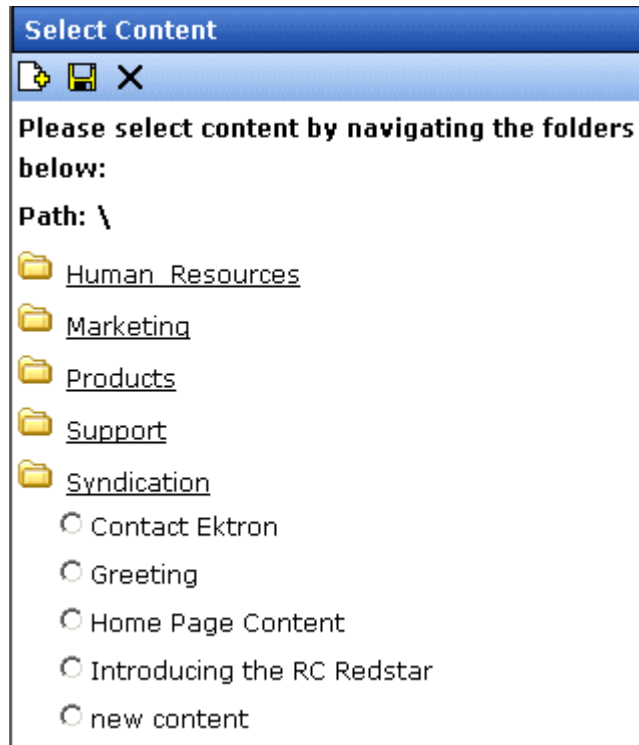
You should only select a content folder for which you have permissions.

To select an existing content block to assign to the task, follow these steps.

1. Navigate to the content block. (Click any folder to open it.)

2. Click the circle to the left of the block.
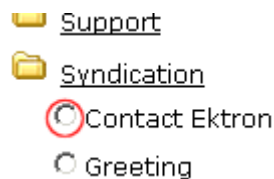
3. Press the Save button (![save icon])

- *See Also:* "Task Type Availability" on page 203

Task Type Availability

Task types can be hidden from users by clicking the Not Available check box in the Add Task Type and Edit Task Type screens. By making Task Types not available, you can make the Task Type unavailable without deleting it.

Creating a Task via a Content Block

The above section describes assigning tasks from the Tasks folder. You can also assign task via the content folder, as illustrated below.

Assigning a Task from the View Content Screen

To assign a task from the View Content screen, follow these steps.

1. Access the View Content screen for the content block to which you want to "attach" in a task, as described in "Viewing a Content Block" on page 32.

2. Click the Add Task button ( ).

3. Follow the directions in "From this page, you can view, update, or add tasks. To learn more about the View Tasks screen, see "Viewing a Task" on page 204. Creating the Task via the Task Folder" on page 198. The only differences are

- the content block's ID number and title appear on the screen

- the language of the content block is the default language

Viewing a Task

Once a task is added, (with the exception of Administrators) only the user who assigned the task and those to whom the task was assigned can view it.

To view a task, follow these steps.

Viewing a Task from the Content Folder

1. Access the Contents folder from the left side of your Workarea.
2. Select the content block associated with the task.
3. Click the **Tasks** tab.
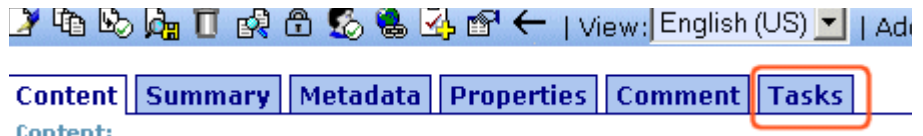
4. The page lists all tasks assigned to the content block.
5. Select a task.

From the view task page, you can add a comment to the task. See "Adding Comments to Tasks" on page 209 for more information.

Viewing a Task from the Tasks Folder

To view a task from the Tasks folder, follow these steps.

1. Form the Smart Desktop, select the Tasks folder.
2. Using one of the options, click the task you want to view.
3. The View Task screen is displayed. From here, you can perform these tasks.

- "Editing a Task" on page 208
- "Deleting a Task" on page 212
- "Adding Comments to Tasks" on page 209

Task View Options

Beneath the main task module folder, several view screens display all tasks filtered by specified categories. 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 change a tasks state to another state. 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	All tasks assigned to you, that are in one of the following states. • not started • active • awaiting data • on hold • reopened • pending	• Click on the task to view it • Add a task • • Sort tasks by column
Assigned To Me	All open tasks assigned to you	• Click on the task to view it • • Sort tasks by column
Assigned By Me	All open tasks you assigned to yourself or others	• Click on the task to view it • • Sort tasks by column
Created by Me	All open tasks you created	• Click on the task to view it • • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
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**. • Click on the task to view it • • Sort tasks by column
Not Started	All whose state is Not Started	• Change to the following states: **Awaiting Data** **On Hold** • Click on the task to view it • • Sort tasks by column
Active	All whose state is Active	• Change to the following states: **Awaiting Data** **On Hold** • Click on the task to view it • • Sort tasks by column
Awaiting Data	All whose state is Awaiting Data	• Change to the following states: **Active** **On Hold** • Click on the task to view it • • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
On Hold	All whose state is On Hold	• Change to the following states: **Active** **Awaiting Data** • Click on the task to view it • • Sort tasks by column
Pending	All whose state is Pending	• Click on the task to view it • • Sort tasks by column
Reopened	All whose state is Reopened	• Click on the task to view it • • Sort tasks by column
Completed	All whose state is Completed	• Change to the following state: **Archive** • Click on the task to view it • • Sort tasks by column

NOTE	Task Types appear in the Show Task Type drop down box, only when they have been added to a task.

Sorting Tasks By Column

On every View Tasks page, you can sort the information by most columns. Information can be sorted by the following.

Column	Click to sort tasks
Title	Alphabetically by title of associated content block

Column	Click to sort tasks
CID	Content block ID number
State	By task state, from first to last
Priority	By task priority. High appears first, followed by Normal then Low
Due Date	By due date, beginning with dates closest to today
Assigned To	Alphabetically by user to whom the task is assigned Note: Once set, a task's assigned-to user does not change throughout the life of the task.
Assigned By	Alphabetically by user who assigned the task

Editing a Task

You can change task information, such as

- Title
- Assigned to
- Language
- Content
- Priority
- Status (State)
- Due Date
- Start Date
- Description

To edit a task, perform the following steps:

1. Access the view task page for the task, as described in
   "Viewing a Task" on page 204.

2. Click the Edit button ( ).

3. The Edit Task screen appears.

4. Edit the task.

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

Adding Comments to Tasks

You can add comments to an assigned task if you want to provide
additional information about its status. For example, if you update
a task's status from *In progress* to *Waiting on Someone Else*, you
can use a comment to describe the status change, such as:

```
left voice mail with John with questions about
his changes to the home page
```

Comments appear at the bottom of the View Tasks screen
(Illustrated below).

View Task

Task Title: Make sure to review your approval list

Assigned To: admin

Assigned By: jedit

Priority: High

Status: Not Started

Due Date: 11-Jun-2004

Start Date: 10-Jun-2004

Description:

Remember to view your approval list every day, and approve any content blocks on the list

Comments:

Date/Time	Added By	Comments
10-Jun-2004 10:47 AM	John Edit	Be sure to check this list every day for content blocks needing approval

Several comments can be added to a task to record its progress from assignment to completion.

To add a comment to a task, follow these steps.

1. Access the View Task screen for the task, as described in "Viewing a Task" on page 204.

2. Click the Add Comment button ( ).

3. The Comments window appears.
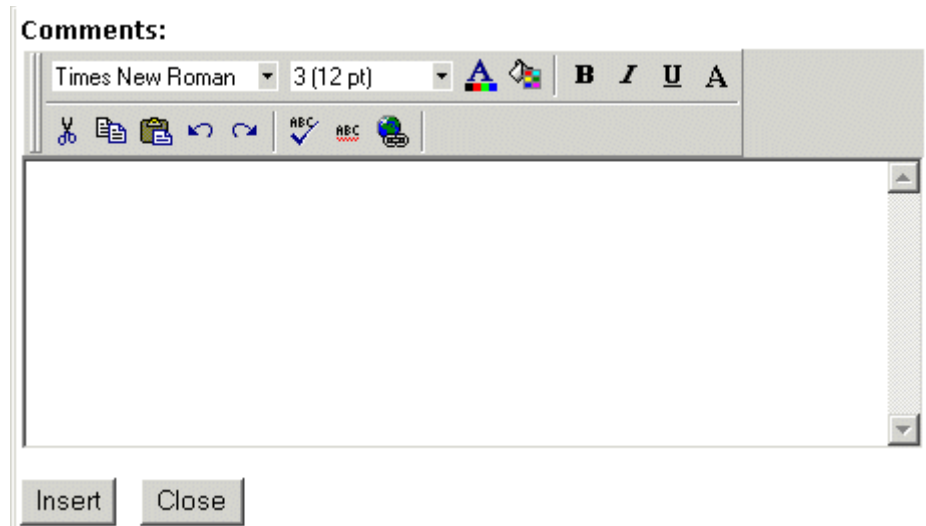
Comments:

4. Enter your comment in the editor. Note that you can format and spell check the text using the toolbar buttons.

5. Click the **Insert** button.

6. The View Task screen reappears with the comment at the bottom of the page.

Updating Comments

To update a comment, follow these steps.

1. Access the View Task screen that contains the comment you want to update, as described in "Viewing a Task" on page 204.

2. Click the comment's **Date/Time** link (illustrated below).

View Task

Task Title: Make sure to review your approval list

Assigned To: admin

Assigned By: jedit

Priority: High

Status: Not Started

Due Date: 11-Jun-2004

Start Date: 10-Jun-2004

Description:

Remember to view your approval list every day, and approve any content blocks on the list

Comments:

Date/Time	Added By	Comments
10-Jun-2004 10:47 AM	John Edit	Be sure to check this list every day for content blocks needing approval

3. The Comments window opens with the comment displayed.

4. Update the comment.

5. Click the Update button.

Deleting a Task

You can easily delete a task that is no longer needed. For example, the user who assigned a task would typically delete it when it is completed.

To delete a task, follow these steps.

1. Access the View Task screen for the task, as described in "Viewing a Task" on page 204.

2. Click the Delete button ( ).

3. A confirmation message appears.

4. Click **OK**.

Viewing a Task's History

Ektron CMS400.NET maintains a history of all events in the life of a task, as well as any comments entered. As examples, the task history shows when and by whom the task was created, when it changed to Active, when it was linked to a content block, when its state changed, when it was approved, etc.

You can view the task's history until the task is purged. To view a task's history, follow these steps.

1. Navigate to the View Task screen, as explained in .

2. Click the History button ( ).

3. The history of task events appears (example below).

View Task History for review today			
Date	Initiator	Activity	Information
16-Sep-2004	jedit	Creation	
16-Sep-2004	jedit	Other	Task Assigned to All Authors
16-Sep-2004	jedit	Content Linked	Plastic Molder #123(13)
16-Sep-2004	jedit	Start Date Changed	Date Set to 17-Sep-2004
16-Sep-2004	jedit	Due Date Change	Date Set to 22-Sep-2004
16-Sep-2004	jedit	Start Date Changed	Date Set to 17-Sep-2004
16-Sep-2004	jedit	Due Date Change	Date Set to 22-Sep-2004

Task Module Toolbar

The following table explains the toolbar buttons available while managing tasks.

Button	Name	Description	More Information
	Add Comment	Add a comment to the task.	"Adding Comments to Tasks" on page 209
	Add Task	Access the Add Task screen from the View Content page.	"Task Module Toolbar" on page 214
	Add Task	Access Add Task screen from task module folder.	"From this page, you can view, update, or add tasks. To learn more about the View Tasks screen, see "Viewing a Task" on page 204. Creating the Task via the Task Folder" on page 198
	Back	Return to previous page.	
	Calendar	Open a calendar to allow you to select a date.	
	Delete Task	Delete a task.	"Deleting a Task" on page 212
	Edit Task	Edit a task.	"Editing a Task" on page 208
	Save	Save task information.	
	Update	Save task information.	
	View Task	View task information.	"Viewing a Task" on page 204

Updating Your User Profile

When a new user is added to an Ektron CMS400.NET Web site, the administrator sets up a personal profile for him. It contains information such as password and e-mail address. You can update some personal profile information when needed. This section explains how to modify your personal profile.

Viewing Your Profile

Before changing your personal profile, you must view it. To do so, follow these steps.

1. Access your Smart Desktop. *See Also:* "Understanding the Smart Desktop" on page 14

2. From the lower left frame, click **Settings**.

3. From the top left frame, click **User Profile**.
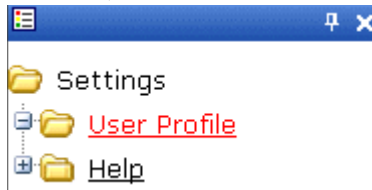
4. Your user profile appears.

View User Information "jedit"

Username:	jedit
First Name:	John
Last Name:	Edit
User Language:	App Default
E-Mail Address:	[None Specified]
System Notifications:	Receiving of E-Mail Disabled

(System notification sending email is currently disabled)

Preferences are locked by the CMS.

Work Page Size:

Width:	790px
Height:	580px

☑ **Display button text in the title bar.**

Landing Page after login:

Refresh the login page

☑ Set smart desktop as the start location in the workare

This User currently belongs to these User Groups:

- Everyone

Task permissions

Create Task

5. Click the Edit button ( ) in the top left corner.

6. The Edit User Information screen appears. The following table explains fields you can edit.

Field	Description
Password	If desired, enter a new password into this field. If you change your password, you do not need to log out then log back in. However, the next time you log in, you must use the new password.
Confirm Pwd	Confirm your new password by retyping it into this field.
User Language	Select a language in which to view Ektron CMS400.NET. Click the black down arrow on the right (circled below) to see a list of choices. **User Language:** English (US) App Default **E-Mail Address:** English (US) French (Standard) ☑ Disable E-Ma German (Standard)
E-mail Address	Enter a new valid e-mail address. Notification e-mails are sent to this e-mail address unless the **Disable E-mail Notification** field is checked. To understand how email notification operates within the content workflow, see "Example of an Approval Chain" on page 67. Also, this address identifies the user sending Instant email. *See Also:* "Sending Instant Email" on page 22
Disable E-mail Notification	Check this box if you do not want to receive notification e-mails.
Work Page Size Your system administrator may let you change the work page values. If he does, the following fields are editable. Otherwise, you can only view the fields.	
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.

Field	Description
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.
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 sign in, enter the URL to that page. You might select a page that leads to a group of pages that you maintain. If you don't know the URL, navigate to the page, go to the browser address bar and select the text following the directory in which **Ektron CMS400.NET** resides. For example, if the browser address bar says `http://www.ektron.com/customers.aspx?id=945`, you would enter **customers.aspx?id=945** here.
Set smart desktop as the start location in the Workarea	If you want the Smart Desktop to appear as soon as you enter the Workarea, click inside this check box. *See Also:* "Understanding the Smart Desktop" on page 14 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.

Field	Description
Inherit Task Permissions From User Groups	This area indicates your task permissions and if you inherit them from user groups to which you belong.
	For more information, see the **Ektron CMS400.NET** Administrator Manual chapter "Managing Tasks," section "Task Permissions."

7. Click the Update button ( ).

Accessing Online Help

The help folder provides access to important and useful information about using Ektron CMS400.NET. It gives you a library of all manuals plus links to relevant pages on Ektron's Web site. We provide this information to make it easier to learn about our Content Management system.

To access the help folder, follow these steps.

1. Access your Smart Desktop. *See Also:* "Understanding the Smart Desktop" on page 14
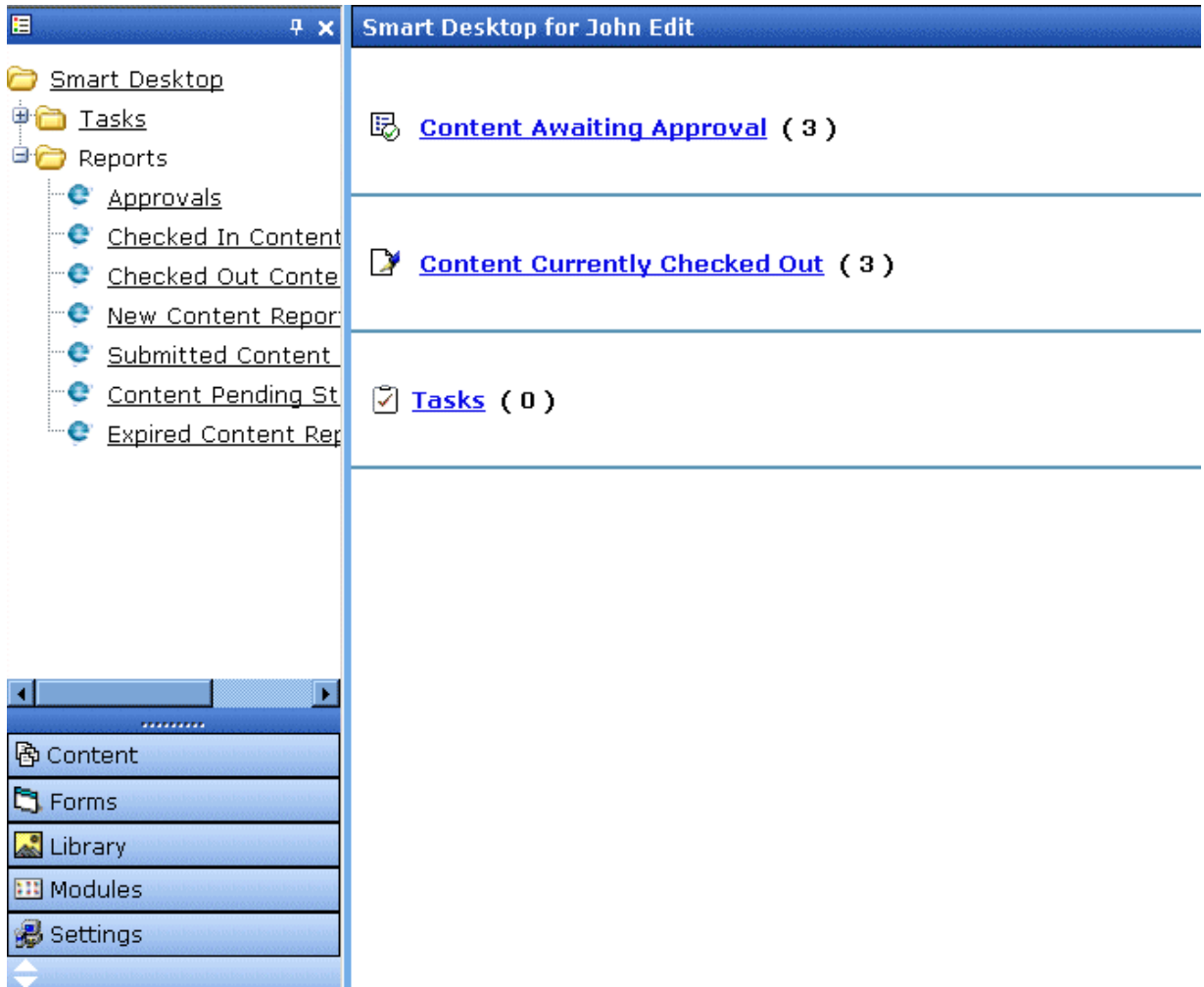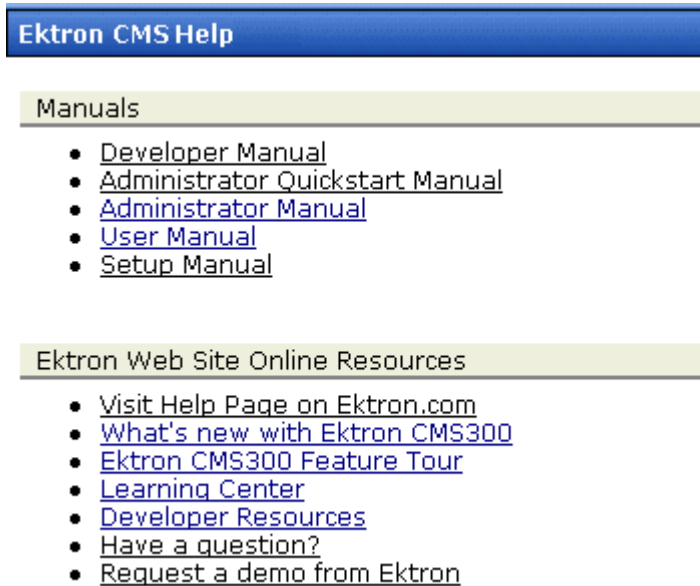
2. From the lower left frame, click Settings.
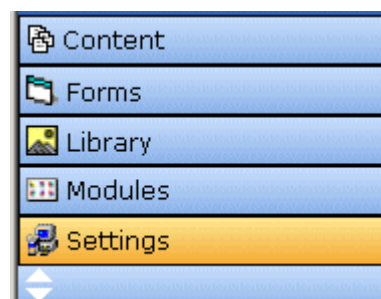
3. From the top left frame, click **Help**.
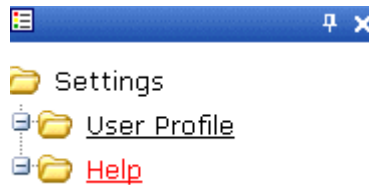
4. The help screen appears in the right frame.

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

Introduction to eWebEditPro+XML

eWebEditPro+XML is a browser-based, Web content editor designed for dynamic Web sites. It lets you create and publish your own Web content in any language supported by the operating system and your Web site.

More specifically, eWebEditPro+XML lets you perform Web page editing functions, such as

- copy content from any Windows-based application
- use Microsoft Word to edit Web content
- cut, copy, and paste
- find and replace text
- check spelling
- edit an image
- change font style, size, attributes (bold, italics, underline), and color
- begin lines with bullets or numbers
- adjust indentation
- right, center, or left justify text and images
- add a bookmark, hyperlink, image, or table
- view your text as WYSIWYG or HTML code
- insert or clean HTML source code

You gain access to these functions either from the toolbar at the top of the editor window or from a menu that appears when you right click the mouse inside the editor.

Using **eWebEditPro+XML**

eWebEditPro+XML is like many other word processing applications. You type text and then use toolbar buttons (illustrated below) and menu options to change the text's appearance or perform functions on it, such as spell checking.

Organization of this Documentation

The next section, "Creating a Simple Web Page" on page 225, walks you through the steps required to create a simple Web page.

The following section, "Toolbar Buttons" on page 229, explains

- each toolbar button
- functions that appear when you right click the mouse

Many of these functions are simple and require only a brief explanation.

The last section, "Using eWebEditPro+XML's Advanced Features" on page 254, explains how to use the more advanced features.

Creating a Simple Web Page

This section walks you through the process of creating a simple Web page, using only a few of the many features available. Later sections explain all of the features and how to use them.

Your Finished Web Page

When you finish this exercise, your simple Web page will look like this.
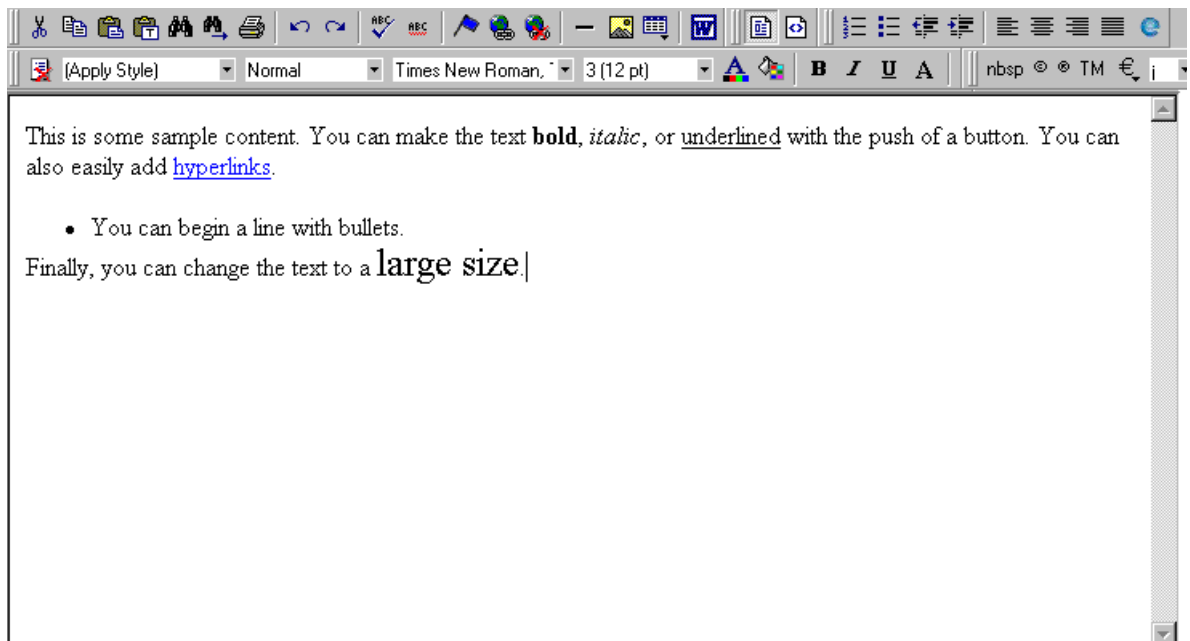
Notice that this page has the following elements.

- The second sentence includes bold, italic and underlined text.
- The third sentence includes a *hyperlink*, text that will jump to another Web page when the user clicks on it.
- The fourth sentence begins with a bullet.

- The last sentence has some very large (18 point) text.

Creating the Sample Web Page

To create this page, follow these steps.

Enter the First Two Sentences

1. Open eWebEditPro+XML. (Your Webmaster installs eWebEditPro+XML on your computer and determines which fonts and sizes are available. Your system may not match the example below.)
2. Type the first two sentences.

   This is some sample content. You can make text bold, italic and underlined with the push of a button.
3. Double click the word "bold" to select it. Then, click the Bold button (**B**) to apply bold to the word.
4. Double click the word "italic." Then, click the Italic button (*I*) to apply italic to the word.
5. Double click the word "underlined." Then, click the underline button (**U**) to underline the word.

Creating a Hyperlink

1. Type **You can also easily add hyperlinks**.
2. Double click the word **hyperlinks** so that it becomes selected.
3. Click the Hyperlink button ( ).
4. The hyperlink dialog box appears.

Hyperlink

Hyperlink Information

Type: http:

Link: http://

Bookmark:

Text: content.

Target Frame:

Quick Link: (select link)

OK

Cancel
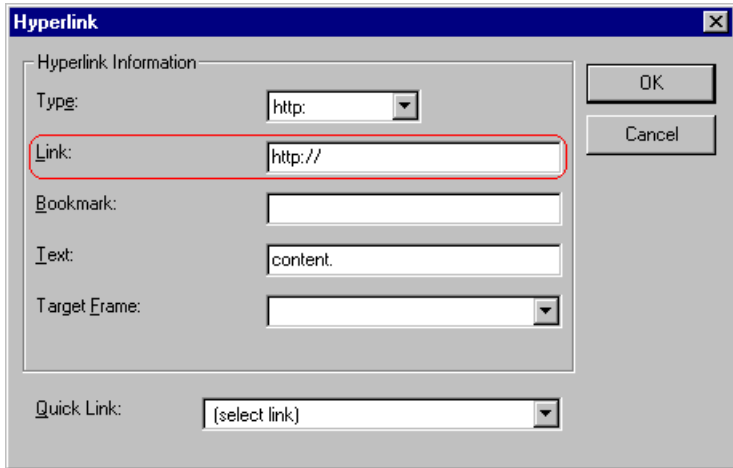
5. In the **Link** field, after **http://**, enter **www.ektron.com**.

6. Click **OK**.

Notice that the word **hyperlink** now appears in a different color. When you save this Web page and a user views it, if the user clicks **hyperlink**, a new Web page will display Ektron's home page.

NOTE   If your computer has an internet connection, you can double click the hyperlink to test it.

Applying a Bullet to a Line of Text

1. Press <Enter> to move the cursor down to the next line.

2. Type **You can begin a line with bullets.**

3. Click the bullet button ( ).

4. Notice that the line is indented and now begins with a bullet.

   • You can begin a line with bullets.

Changing the Size of Text

1. Press <Enter> to move the cursor down to the next line.

2. Type **Finally, you can change the font to a large size.**

3. Select the words **large size**.

4. Click the down arrow to the right of the font size list. When you do, the list of available fonts appears.
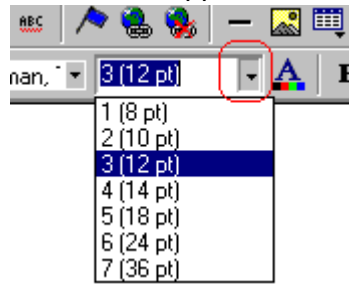
5. Click **5 (18 pt)**.

6. Notice that **large size** is now much larger than the other text.

Congratulations! You have just created your first Web page with eWebEditPro+XML. You have learned how to apply bold, italic, and underlining, create a hyperlink, add a bullet to a line, and change the size of the text.

This sample used only a few of the many features available. The following sections explain the rest of the details about using the product.

Toolbar Buttons

This section explains how to use the buttons and drop-down lists on the toolbar. (The toolbar is the row of buttons across the top of the editor window, illustrated below.)
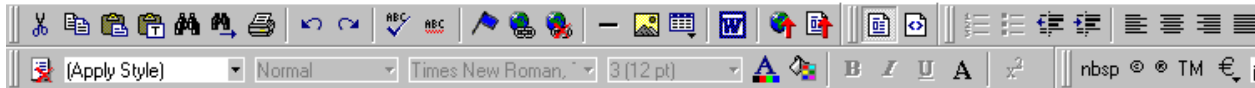
The buttons let you perform functions such as cutting and pasting text, inserting images, and creating tables.

All buttons may not appear. Your Webmaster determines which buttons appear on your toolbar. Also, you can customize your toolbar so that it contains only the buttons you use (See "Customizing Your Toolbar" on page 243).

This section explains

- Selecting Text
- Applying Formatting Attributes to Text
- Table of Toolbar Buttons and Drop-Down Lists

Selecting Text

You select text before performing an action on it, such as copying it.

- To select *all* information on a page, press Ctrl+A.
- To select *a portion* of the information on a page, you have two choices.
  - Hold down the left mouse button and drag the cursor across the data you want to select.
  - Hold down the Shift key and the right arrow key (➡️) until the desired data is selected.

- To select *a single word*, place the cursor on the word and double click the mouse.

Selected text has different background and foreground colors, as illustrated below.

| Horizontal Alignment | Sets the horizontal position of the entire table. |
| Border Color | Sets the color of the table borders unless *Use Default Color* is checked |
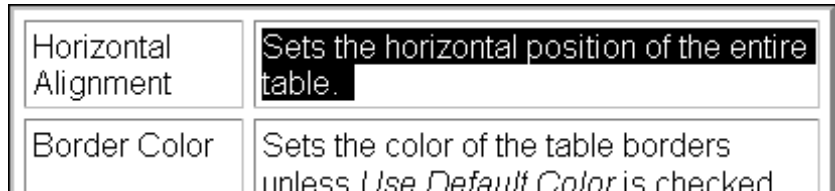
Applying Formatting Attributes to Text

Several buttons apply formatting attributes to text, such as bold and italics. There are two ways to apply these attributes.

- Enter the text. Then, select the text and press the toolbar button. The button is now in a "pressed in" condition, and the text has the formatting attribute.
- Press the toolbar button. Then, begin typing the text. As you type, the formatting is applied.

To stop applying the formatting, press the button again. This action changes the button to a "pressed out" condition and terminates the formatting.

Table of Toolbar Buttons and Drop-Down Lists

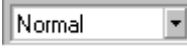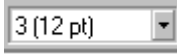The following table explains each toolbar button and drop-down list.

NOTE   The Data Designer feature also has a toolbar. For information, see "Using the Data Designer" on page 177.

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Cut	Ctrl+X	Remove selected text and graphics. Place that data into temporary memory, also known as the "clipboard." (If you later cut or copy more information onto the clipboard, the new information overwrites the original information.)	
Copy	Ctrl+C	Copy selected text and graphics into temporary memory. Leave selected data where it is. (If you later cut or copy more information into memory, the original information is lost.)	"Copying from Other Applications" on page 255
Paste	Ctrl+V	Insert the most recently cut or copied text and graphics at the current cursor location.	
Select All	Ctrl+A	Select all content	
Select None		Deselect all selected content	
Paste Text		Paste the contents of the clipboard as plain text. That is, all HTML tags (including images) are not pasted. This button is helpful when you want to eliminate the HTML formatting of the text being copied.	
Replace		Launches the Search and Replace dialog box. The dialog searches for (and lets you optionally replace) text that you specify.	"Finding and Replacing Text" on page 256
Find Next		Find next occurrence of the string entered into the Find What field of the Search and Replace dialog box.	"Finding and Replacing Text" on page 256
Print	Ctrl+P	Print the editor content.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Undo	Ctrl+Z	Reverse the most recent action, as if it never occurred. You can undo as many actions as you wish.	
Redo	Ctrl+Y	Reverse the undo action.	
Spell Check (manual)		Begin spell checker.	"Checking Spelling Upon Demand" on page 261
Spell Check (automatic)		Turn on or off spell check as-you-type feature.	"Checking Spelling as You Type" on page 260
Bookmark		Create a bookmark.	"Using Bookmarks" on page 361
Edit Hyperlink		Change information about a hyperlink.	"Using Hyperlinks" on page 365
Remove Hyperlink		Remove a hyperlink.	"Removing a Hyperlink" on page 370
Horizontal Line		Insert a horizontal line.	
Picture		Insert a picture.	"Inserting Images" on page 268
Image Editor		Edit an image.	"Editing Images" on page 283
Table		Insert or edit a table.	"Introduction to Tables" on page 316
Edit in Microsoft Word		Edit content in Microsoft Word.	"Editing in Microsoft Word" on page 265
Insert Comment		Insert a comment into the content (eWebEditPro+XML only)	"Entering Comments" on page 234

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Upload Files		Upload any external files (such as images) to the server.	"Moving an Image to the Server" on page 281
Upload Content		Upload the content currently in the editor to the server.	"Content Upload" n the eWebEditPro Developer's Reference Guide
Data Design Mode		Switches to Data Design Mode. Button only appears when **eWebEditPro+XML** configuration enables the Data Designer feature.	"Design Mode vs. Data Entry Mode" on page 179
Data Entry Mode		Switches to Data Entry Mode. Button only appears when **eWebEditPro+XML** configuration enables the Data Designer feature.	"Design Mode vs. Data Entry Mode" on page 179
View as WYSIWYG		Display the page content as WYSIWYG (What You See Is What You Get). WYSIWYG is the ability to see in the editor what will appear when user views the Web page.	
View as HTML		Display the page content as HTML.	"Viewing and Editing HTML" on page 371
Number		Begin the line on which the cursor rests with a number. If the line above this line is • not numbered, assign this line 1 • numbered, assign a number one more than the line above	
Bullet		Begin the line on which the cursor rests (or all selected lines) with a bullet (•).	
Indent		Increase or decrease the current line's distance from the left margin.	

Button	Equivalent Keystroke **(Internet Explorer only)**	Function	For more information, see
≣ ≣ ≣ ≣ Left, Center, and Right Justify		Align paragraph so that it is arranged • evenly on the left side (uneven on the right) 　• in the center of each line 　• evenly on the right side (uneven on the left) • evenly on right and left side	
About **eWebEditPro+XML**		Display a dialog box that shows your version of **eWebEditPro+XML** and your license keys.	

Remove Style		Remove all style information applied to selected text. (You apply styles using the Style dropdown list.) For example
		Before
		`<P class=note>This is initial content.</P>`
		After
		`<P>This is initial content.</P>`	

Style [Apply Style] ▼		Display a list of styles. Users can select from the list to apply a style to selected text. Note that the list can change depending on the formatting of the selected line. Your Webmaster determines which styles are available.	
Heading Size Normal ▼		Change the heading size. Your Webmaster determines which heading sizes are available.	

Button	Equivalent Keystroke (Internet Explorer only)	Function	For more information, see
Times New Roman, ▾ Font Style		Change the font style. Your Webmaster determines which fonts are available. Note: If more than one font appears in a selection, the browser on the reader's PC tries to display text using the first font. If the browser cannot find that font, it tries to use the second, etc.	
3 (12 pt) ▾ Font Size		Change the font size. Your Webmaster determines which font sizes are available.	
A Font Color		Change the font color.	
Background Color		Change the background color of the text. Note: To remove background color from selected text, click the Normal button (A).	
B Bold	Ctrl+B	Make the text **bold**.	
I Italic	Ctrl+I	Make the text *italic*.	
U Underline	Ctrl+U	Make the text underlined.	
A Normal		Remove all formatting from selected text.	
nbsp		Insert a blank space character. Although you can add spaces in the editor using the <space> bar on the keyboard, those spaces are ignored when the content is displayed by a browser.	

Button	Equivalent Keystroke **(Internet Explorer only)**	Function	For more information, see
◎ Copyright		Insert copyright symbol.	
® Registered Trademark		Insert registered trademark symbol.	
TM		Insert trademark symbol.	
i ▾ and €▾ Special Characters		Insert special characters (such as £ μ Ñ) from a drop down list. To view the list, click the black down arrow.	

Position Objects Options

These buttons let you absolutely position elements (pictures, tables, etc.) anywhere on a page.

WARNING! Some older browsers (for example, Netscape 4) do not display absolutely positioned elements. Absolute position uses the style attribute. If you use this feature, the content is not compatible with all browsers.

Button	Function
▣ Position	Lets you move selected table or image anywhere on the screen.
🔒 Lock	"Locks" selected table or image at its current screen position. Nothing can move a locked object. To move the object, unlock it by clicking this button again.
▣ Move to Front	If two or more images overlay each other, moves the selected image in front of the others.
▣ Move to Back	If two or more images overlay each other, moves the selected image behind the others.

| Button	Function
Above Text	If text overlays an image, move the image in front of the text.
Below Text	If an image overlays text, move the text in front of the image.

Text Direction Options

The text direction menu options ( ) allow bi-directional editing of text, which is useful for Arabic, Farsi and Hebrew. The client computer must also support the language.

The text buttons determine the editing direction, while the edit buttons determine the side of the editor that displays the scroll bar.

For right-to left languages, such as Arabic, Farsi and Hebrew, the text editing would be "right to left", and the scroll bar would be on the left side.

For western European languages, the text editing would be "left to right", and the scroll bar would be on the right side.

| Button	Function
Left-Right Text	Text is entered left to right.
Right-Left Text	Text is entered right to left.
Left-Right Edit	The vertical scroll bar appears on the right side of the window.
Right-Left Edit	The vertical scroll bar appears on the left side of the window.

Form Elements Toolbar
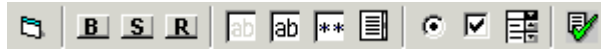
This toolbar lets you insert the elements of an HTML form into the editor. You begin by clicking the Forms button (). Next, add the fields and buttons that make up your form. The buttons are described in "Buttons of the Form Elements Toolbar" on page 239.

NOTE　This documentation does not explain how to create HTML forms. Many books and Web sites are dedicated to this subject, such as http://www.w3schools.com/html/html_forms.asp.

Updating Form or Element Information

If you want change a form or an element, click the form or element within the editor then click the element's toolbar button. For example, to update the textarea field in the illustration below, click the field then click the text area button (circled in red below).
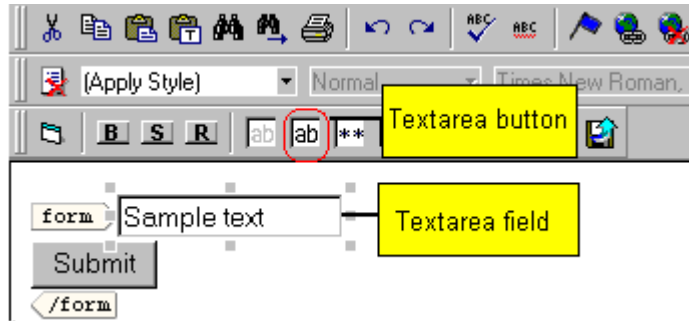
When you do, a dialog appears with the element's information. Update as needed.

Replacing Form or Element Information

To replace a form element with another, follow these steps.

1. Click the element to be replaced.
2. Click the new element's toolbar button.
3. Complete the dialog that appears.
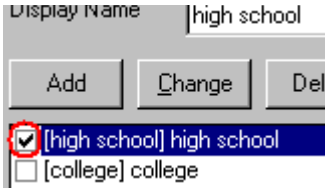
When you close the dialog, the new element and its information replace the old element.

Buttons of the Form Elements Toolbar

Button	Function

🗐 Form	Inserts opening and closing form tags. For example:
	
	`<form name="Test" action="http://localhost/ewebeditpro4/`
	`formtest.htm" method="post">`
	`</form>`
	
	When you click this button, a dialog box prompts you to enter the following information for the form:
	
	● Name
	● Action page
	● Method
	● Encode Type

B Button	Inserts a button. For example: `<input type="button" value="Test Button" name="Test" />` When you click this button, a dialog box prompts you to enter the following information for the button: ● Name ● Button caption
S Submit button	Inserts a submit button. For example: `<input type="submit" value="Submit" />` When you click this button, a dialog box prompts you to enter the following information for the submit button: ● Button caption
R Reset button	Inserts a reset button. For example: `<input type="reset" value="Reset Page" />` When you click this button, a dialog box prompts you to enter the following information for the reset button: ● Button caption

Button	Function
[ab] Hidden text field	Inserts a hidden text field. For example: `<input type="hidden" value="This is initial content" name="mycontent" />` When you click this button, a dialog box prompts you to enter the following information for the hidden text field: ● Name ● Value
[ab] Text field	Inserts a text field. For example: `<input size="15" value="This is initial content" name="mycontent" />` When you click this button, a dialog box prompts you to enter the following information for the text field: ● Name ● Value ● Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
[**] Password	Inserts a password field. For example: `<input type="password" value="" name="mypassword" />` A password differs from a free text field in that the user entry appears as asterisks (*), *not* to the actual characters. This is done to prevent an onlooker from seeing the password. When you click this button, a dialog box prompts you to enter the following information for the password field: ● Name ● Value ● Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)

Button	Function
Textarea field	Inserts a textarea field. For example: `<textarea name="mycontent" rows="5" cols="40">This is initial content</textarea>` When you click this button, a dialog box prompts you to enter the following information for the textarea field: • Name • Value • Columns • Rows
Radio button	Inserts a radio button. For example: `<input type="radio" checked="checked" name="mybutton" />` When you click this button, a dialog box prompts you to enter the following information for the textarea field: • Name • Value • Default is Checked
Check box	Inserts a check box. For example: `<input type="checkbox" checked="checked" name="mycheckbox" />` When you click this button, a dialog box prompts you to enter the following information for the check box: • Name • Value • Default is Checked

Button	Function

Select box	Inserts a selection box. For example:
	
	```<select multiple="multiple" size="25" name="myselectbox">```
	```<option value="option1">option1</option>```
	```<option value="option2">option2</option>```
	```</select>```
	
	 When you click this button, a dialog box prompts you to enter the following information for the select box:
	
	 • Name
	
	 • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)
	
	 • Allow multiple (determines if a user responding to this selection box can choose more than one option)
	
	 • Option name (the internal value assigned to this option)
	
	 • Display name (the user sees this text in the selection box)
	
	 This dialog also has three buttons, described below.
	 Add - lets you add a new option to the selection box
	 Change - lets you change the selected option's option name or display name
	 Delete - removes option from selection list
	 Note that you can place a check mark next to an option to specify that option as a default value on the form.
	
	 If you place a check mark next to an option, the user only needs to press <Tab> to select the option, as opposed to placing the cursor next to the option and clicking the mouse.

File Upload	Inserts a File Upload field and a Browse button. For example: ```<input type="file" size="10" name="Save" />``` When you click this button, a dialog box prompts you to enter the following information for the File Upload: • Name • Size (the number of characters in the field. If a user's entry exceeds the size, the field scrolls to the right.)

Customizing Your Toolbar

The **eWebEditPro+XML** toolbar consists of one or more *menus*. Each menu has one or more buttons.

You can recognize the beginning of a menu by the double vertical bars (circled in the illustration).

This sample toolbar has four menus.

Your Webmaster determines

- which menus are available to you
- which buttons appear on each menu, and the sequence in which they appear initially
- whether or not you are authorized to customize your toolbar. If you are not authorized, your edits are not saved when you leave the **eWebEditPro+XML** screen.

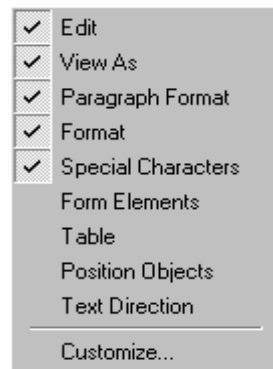If you are authorized to customize your toolbar, there are six ways to do so. You can

- remove or add available menus
- remove or add toolbar buttons
- rearrange menus on a toolbar
- create a new menu
- move a menu off the toolbar
- rearrange the buttons on a menu

Each procedure is explained below.

Removing Or Adding Menus

To remove or add a menu, follow these steps.

1. Place the cursor on the toolbar.
2. Right click the mouse.
3. A dropdown list appears. It displays all menus available to you and the **Customize** option.

NOTE If **Customize** does not appear on the menu, you are not authorized to customize the toolbar.

Menus that are checked appear on your toolbar.

In the above example, the **Special Characters**, **View As**, **Format,** and **Paragraph Format** menus appear. The **Table, Position Objects** and **Text Directions** menus, which are not checked, are available but do not currently appear on the toolbar.
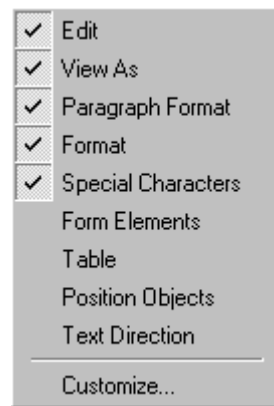
4. To *add* a menu to your toolbar that appears on the list but is not currently checked, place the cursor on the menu name and click the mouse. A check mark appears, and the menu appears on the toolbar.

   To *remove* a menu from your toolbar, place the cursor on the menu name and click the mouse. The check mark disappears, and the menu no longer appears on the toolbar.
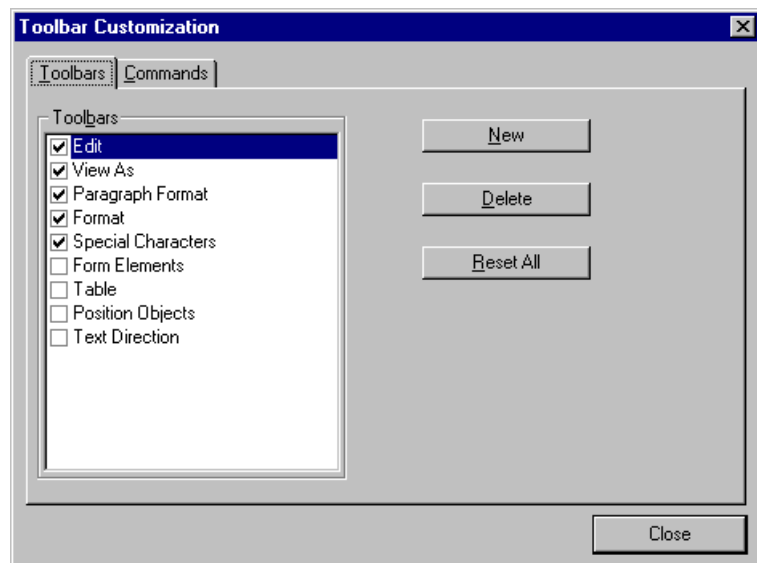
Removing or Adding Menu Items

1. Place the cursor on the toolbar.

2. Right click the mouse.

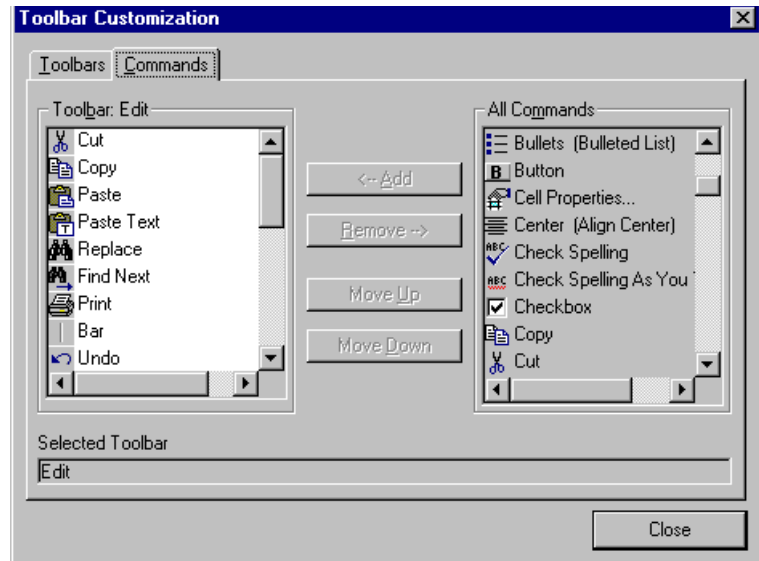3. A dropdown list appears. Click **Customize**.

4. The Toolbar Customization dialog box appears.

5. Click the menu that you want to edit.

6. Click the **Commands** tab. A new screen appears.

Using the Customize Toolbar Dialog Box

The left half of the **Commands** screen lists the buttons in the sequence in which they appear on the menu.

The right half of the screen lists available buttons that do not currently appear on the menu.

To *add* a button to the toolbar, drag it from the right side of the screen to the location on the left side where you want it to appear. (You can also click a button then click **<--Add**. This action places the button at the bottom of the list.)

To *remove* a button from the toolbar, drag it from the left side of the screen to the right. (You can also click a button then click **Remove- ->**.)

The **Move Up** and **Move Down** buttons let you to move any button up or down one slot within the list of buttons.

Rearranging the Items on a Menu

1. Click the button you want to move

2. Click **Move Up** and **Move Down** to move the button up or down one slot for each click.
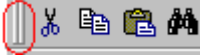
Restoring Toolbars

If you remove all toolbars from your menu, and then want to restore the menus but do not have the **Customize** menu option, follow these steps.

1. Place the cursor in the editor.
2. Right click the mouse.
3. A menu appears with a **Redisplay toolbars** option.
4. Click this option to restore all menus.

Rearranging the Menus on a Toolbar

To move a menu to a different toolbar location, follow these steps.

1. Place the cursor on the double vertical bars that indicate the

   beginning of the menu.
2. Click the mouse.
3. Hold down the mouse button and drag the menu to the new location. You can move the menu anywhere else on the toolbar.

   Note that your Webmaster can define a menu so that it cannot reside on the same row with another menu. If you move such a menu, it will not remain on a row with another menu. Instead, it will move down to the next row.
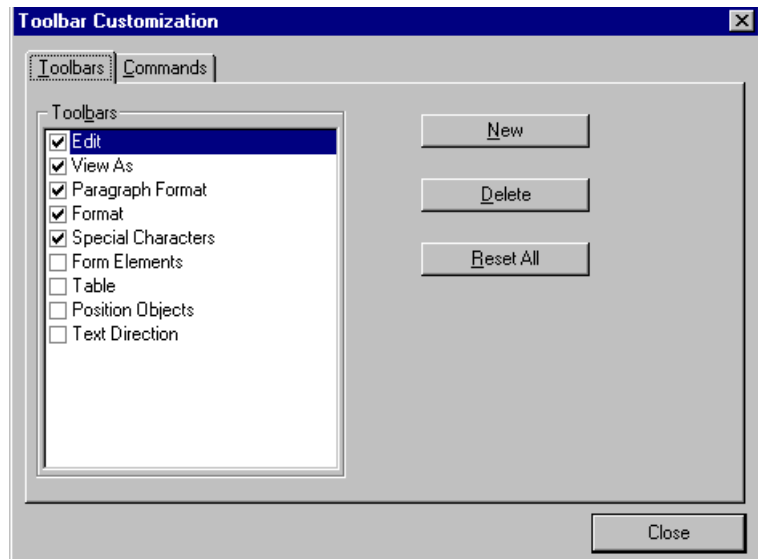4. After you place the menu where you want it, release the mouse button.

Creating a New Menu

1. Place the cursor on the toolbar.
2. Right click the mouse.
3. A dropdown list appears. Click **Customize.**
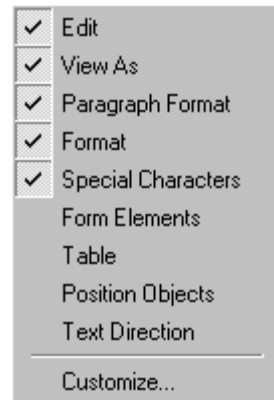
4. The Toolbar Customization dialog box appears.

5. Click **New**.

6. A new menu appears on the left side of the window, above the existing menus. The default name of the new menu is **Custom 0**.

7. To rename the menu, place the cursor in the field that displays the new menu and enter the new name.

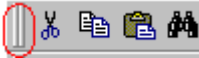| **NOTE**	If you click outside the toolbar name field, you cannot later change the menu's name.

8. To have the menu appear on your toolbar, click in the small box to the left of the menu name.

9. Click the **Commands** tab.

10. Add buttons to the menu, following the procedure described in "Using the Customize Toolbar Dialog Box" on page 246.

Moving a Menu Off the Toolbar

You can move a menu from the toolbar to anywhere else on the screen, even if **eWebEditPro+XML** does not occupy the entire screen.

You can also change the orientation of a menu that is not on the toolbar from a horizontal to vertical.

To move a menu, follow these steps.

1. Place the cursor on the double vertical bars that indicate the beginning of the menu.

2. Click the mouse.

3. Hold down the mouse button and drag the menu to the new location. You can move the menu anywhere on the screen.

4. After you place the menu where you want it, release the mouse button.

Changing the Menu's Orientation

To change the menu's orientation, follow these steps.

1. Drag the menu from the toolbar.

2. Move the cursor to the bottom of the menu until it becomes a double-headed arrow (illustrated below).
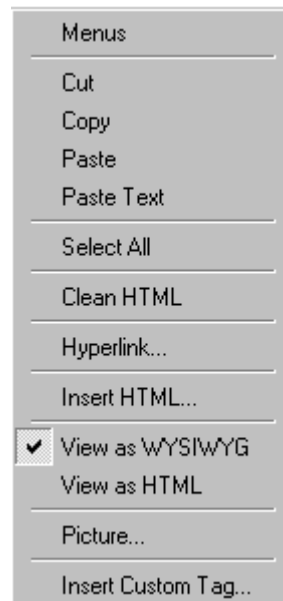
3. Drag the cursor to the lower left. As you do, the menu's orientation changes from horizontal to vertical (illustrated below).

The Context Sensitive Menu

This section explains the functions available on the menu that appears when you right click the mouse within the **eWebEditPro+XML** editor. You can also access this menu by pressing the application key ( ).

Because this menu can change depending on what you are doing, it is called a *context-sensitive* menu.

Menus
Cut
Copy
Paste
Paste Text
Select All
Clean HTML
Hyperlink...
Insert HTML...
✔ View as WYSIWYG
View as HTML
Picture...
Insert Custom Tag...

NOTE A different context-sensitive menu is available when your cursor is within a table. That menu is described in "The Table Context Sensitive Menu" on page 326.

The following table lists the menu options and where to get more information on each.

Menu Option	Lets you	For more information, see
Menus	View all toolbar menus.	"Using eWebEditPro+XML without a Mouse" on page 375
Cut	Remove selected text and graphics. Place that data into temporary memory. If you later cut or copy more information into memory, the information in memory is lost.	
Copy	Copy selected text and graphics into temporary memory. Leave selected data where it is. (If you later cut or copy more information into memory, the original information is lost.)	"Copying from Other Applications" on page 255
Paste	Insert the most recently cut or copied text and graphics at the current cursor location.	
Paste Text	Paste the contents of the clipboard as plain text. That is, all HTML tags (including images) are not pasted. This button is helpful when you want to eliminate the HTML formatting of the text being copied.	
Select All	Select all information on your page. After you select it, you can cut it, copy it, etc.	
Clean Source	Remove unnecessary HTML tags	"Cleaning Source Code" on page 373
Hyperlink	Create a link to another Web page or a spot within the current page	"Using Hyperlinks" on page 365
Edit Source	Edit your page's HTML source	"Editing a Section of a Page" on page 372
Insert Source	Insert HTML source onto the page at the cursor location.	"Inserting Source" on page 372

Menu Option	Lets you	For more information, see
Check Spelling	Compare words in the editor to Microsoft WORD spelling list.	"Checking Spelling" on page 260
View as WYSIWYG/HTML	View and edit your page's HTML	"Viewing and Editing HTML" on page 371
Picture	Insert a picture	"Inserting Images" on page 268
These options only appear if your site is using **eWebEditPro+XML**: Insert Custom tag, *tag name* tag Attributes, *tag name* tag Properties	Work with XML tags	"Editing XML Web Pages" on page 381 only available in the **eWebEditPro+XML** User Guide

Using eWebEditPro+XML's Advanced Features

Most of **eWebEditPro+XML**'s features are easy to learn. For example, to make your text bold, you select the text, and click the bold button (**B**).

However, some of **eWebEditPro+XML**'s features are more complex. For example, when creating a table, you must make several decisions: the number of rows and columns, the size of the border, the spacing between cells, etc.

The following sections explain **eWebEditPro+XML**'s more advanced features.

Copying from Other Applications

You can copy information from most other Windows applications into **eWebEditPro+XML** and retain the formatting from the original application. In general, copying from another application involves these steps.

1. Sign on to the application in which the information resides.
2. Select the information to be copied.
3. Press <Ctrl>+<C>.
4. Go to **eWebEditPro+XML**.
5. Press <Ctrl>+<V> to paste the selected information.

Note that you can only copy content, not background information that generates content.

So, for example, you can copy the values in a spreadsheet but not the formulas used to generate those values. Also, copying dynamic fields from Microsoft WORD would retrieve the current value of the fields but not the variables that generate those values.

It's a good idea to experiment with copying from different sources to test the results.

Finding and Replacing Text

To find (and optionally replace) text on your Web page, click the Replace button (📖). When you do, the Find and Replace dialog box appears.
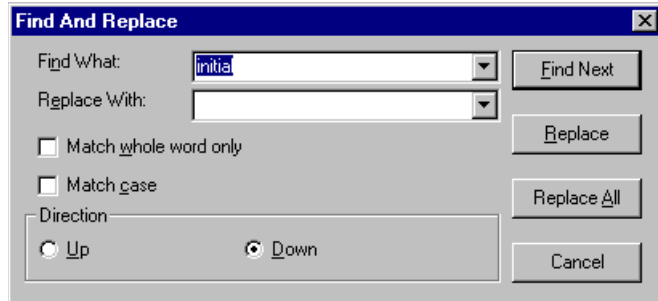
You can use this dialog box to simply find text, or to find text and replace it with other text. Each option is explained below.

Finding Text

1. In the **Find What** field, type the text that you want to find in the content.
2. Set dialog box options (see "Additional Options on the Dialog Box" on page 257).
3. Click **Find Next** to find the next occurrence of the "find" text.

Finding and Replacing Text

1. In the **Find What** field, type the text that you want to find.
2. In the **Replace With** field, type the text to replace the "find" text.

3. Set dialog box options (see "Additional Options on the Dialog Box" on page 257).

4. If you want to

   – replace all occurrences of the "find" text with the "replace" text, click **Replace All**.

You can undo replacements one at a time using the Undo button (↰).

   – replace only the highlighted term with the "replace" text, click **Replace**.

   – find the next occurrence of the "find" text (and optionally replace it with the "replace" text), click **Find Next**.

   – change the highlighted term using the editor, exit the Find and Replace dialog, move to the term and edit as needed.

     To restart the search, press the Find Next button (🔍).

5. Continue to find and optionally replace or edit until you reach the end of the text.

Additional Options on the Dialog Box

The dialog box also lets you specify

- a search direction
- if the search considers the case (upper or lower) of the search term
- whole word match

Specifying a Search Direction

The search begins where the cursor is when you click **Find Next**. To make sure you locate every occurrence of a term, place the cursor at the top of the content before beginning the search.

If you begin the search from somewhere other than the top of the page, use the **Direction** field to search from the current location to the top or bottom of the file.
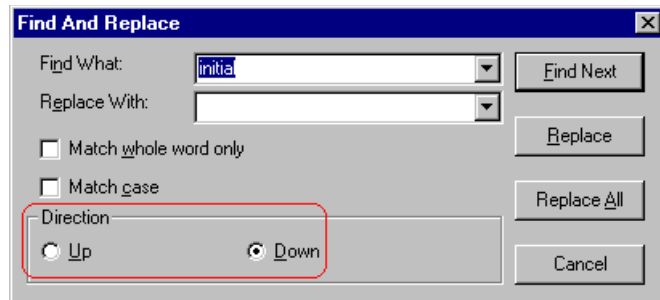
To search from the cursor location to the	Click this option in the Direction field
end of the page	**Down**
top of the page	**Up**

Considering the Case of a Search Term

By default, the search ignores the case (upper or lower) of a search term. In other words, if you enter **Bob** in the **Find What** field, the search finds bob, Bob, BOB, etc.

If you want the search to be case sensitive, use the **Match case** check box on the Find window. If you enter **Bob** in the **Find What** field and place a check in the **Match case** box, the search only stops at Bob, not bob or BOB.
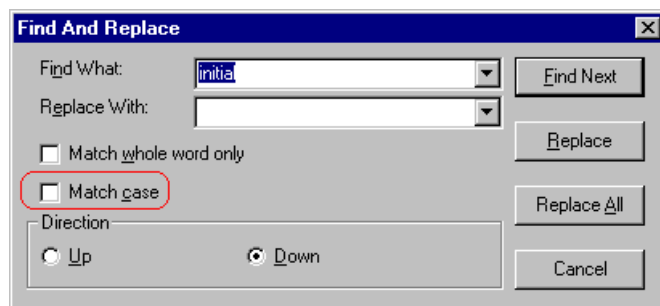
Whole Word Match

By default, the search finds any occurrence of the text that you type into the **Find what** field. For example, if you enter **the**, the search finds the word **the**, as well as those letters embedded in other words, such as o***the***rs and ***the***ater.

If you want the search to find only whole word occurrences of the text you type into the **Find what** field, click the **Match whole words only** box in the Find dialog box.
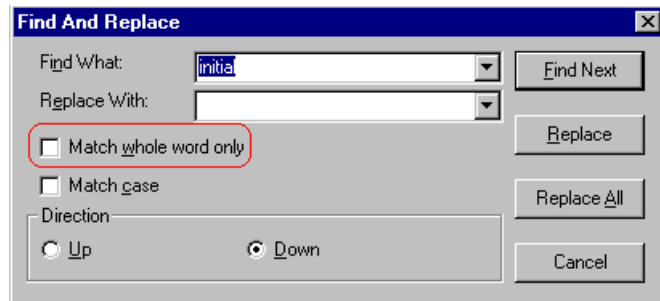
Checking Spelling

The **eWebEditPro+XML** editor can check your spelling as you type or whenever you want to check it. The rest of this section explains

- Disabling Script Blocking
- Check Spelling as You Type
- Checking Spelling Upon Demand
- Spell Checking Selected Text
- Setting Spell Check Options

Disabling Script Blocking

If Norton Antivirus ™ 2001 is installed on your computer, you need to disable script blocking in order to use the spell checker. If you do not disable script blocking, an error message will appear whenever you check spelling.

To do this, follow these steps.

1. Launch Norton Antivirus ™ 2001.
2. From the first window, click **Options**.
3. On the next window, click **Script Blocking**.
4. On the script blocking window, uncheck **Enable Script Blocking**.
5. Press **OK**.

Checking Spelling as You Type

You can have the editor check spelling as you type. To turn on the spell-check-as-you-type feature, click the automatic spell check button( ).

When you click the button, the spell checker reviews every word in the file. A wavy red line (~~~~) appears under any word whose spelling is not found in the system's dictionary.

The spell checker continues to review each word as you type it, marking any words not in the dictionary.

NOTE Depending on the speed of your computer, there may be a short delay between the time you type an incorrect word and when the wavy red line appears. Also, the spell check does not check a word until you enter a space character after the word.

Fixing Spelling Errors

There are two ways to fix a spelling error (indicated by a wavy red line).

- Click the misspelled word and then right click. A menu displays words that are similar to the misspelled word. Click the correct word.
- If you know the correct spelling, type the correction.

Checking Spelling Upon Demand

If you do not want to use the spell-check-as-you-type feature, you can begin spell checking whenever you wish. To do this, click the spell check button (![ABC]).

When you do, the system checks each word in the file. If the spell check finds a word in none of the dictionaries, it displays the Spelling dialog box.
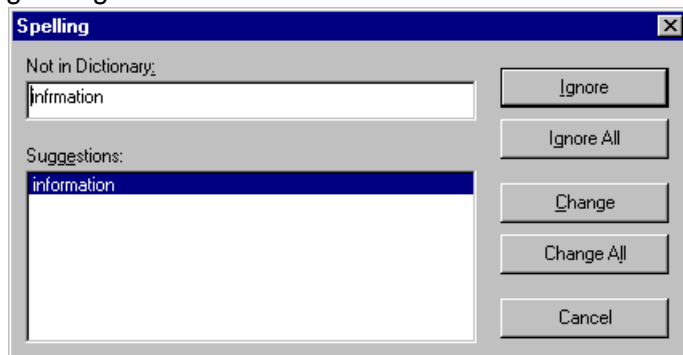
The Spelling Dialog Box

The Spelling dialog box displays

- the word not in the dictionary (in the **Not in Dictionary** field).

- suggested spellings for the word (in the **Suggestions** field). The most likely replacement is selected at the top of the list.

- buttons that let you ignore the word, change the word, or exit.

If you want to	Do this
Replace the word with one of the suggestions and continue spell checking the page.	1. Click the suggested word. 2. Click **Change.**
Replace *every occurrence* of the word with one of the suggestions and continue spell checking the page.	1. Click the suggested word. 2. Click **Change All.**
Correct the spelling of the word by typing it and continue spell checking the page.	1. Click in the **Not In Dictionary** field. 2. Correct the spelling. 3. Click **Change**.
Leave the word as is; continue spell checking the page. You would normally do this if a word (such as a company name) is spelled correctly even though it is not in the dictionary.	Click **Ignore**.
Leave the word as is; continue spell checking the page, ignoring all other occurrences of the word.	Click **Ignore All**.
Stop spell checking.	Click **Cancel**.

Spell Checking Selected Text

To check the spelling for a single word or a group of words, follow these steps.

1. Select the text that you want to spell check.

2. Press the manual spell check button (✔).

---

3. The spell checker reviews the words in the selected text and stops at any word not in the dictionary. For documentation of options when a misspelled word is found, see "The Spelling Dialog Box" on page 262.

4. When the spell checker finishes reviewing the words in the selected text, it displays the following message

Finished checking selection. Do you want to check the rest of the document?

Click **Yes** to spell check the rest of the document (including text above the selected text).

Click **No** to stop the spell checker.

Setting Spell Check Options

eWebEditPro+XML can use Microsoft Word's spell checking feature (your Webmaster makes this decision).

If your installation uses Word, Word's Spelling & Grammar window (available from the **Tools - > Options** menu) has settings that affect the operation of the spell check.
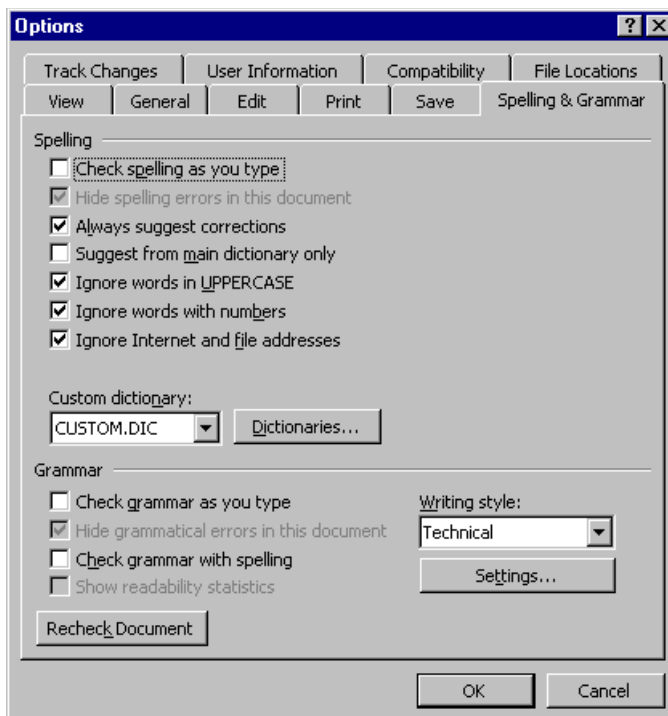
Specifically, you can set the spell check feature to check or ignore

- words in UPPERCASE (for example, XYLOGIC)
- words with numbers (for example, mp3)
- Internet and file addresses (for example, `http://www.ektron.com/`)

As an example, if you check the box to the left of **Ignore Words in UPPERCASE**, **eWebEditPro+XML**'s spell check does not consider words in all uppercase characters.

You also use the custom dictionary section of the screen to identify custom dictionaries for the spell check to reference.

The spell check feature does not use the other fields on this screen.

Editing in Microsoft Word

If your computer has Microsoft Word 2000 or greater, you can edit content within Word. You may prefer to do this because of familiarity with Word's user interface, and to use additional functionality available in Word.

NOTE Some Word formatting may not be compatible with HTML and, as a result, not be transferred to eWebEditPro+XML.

To edit with Word, follow these steps.

1. Open **eWebEditPro+XML**.

2. Press the Word toolbar button ().

3. The following dialog may appear, warning you that some Word formatting may not be transferred back to **eWebEditPro+XML**. Press **Yes** if you still want to edit in Word.
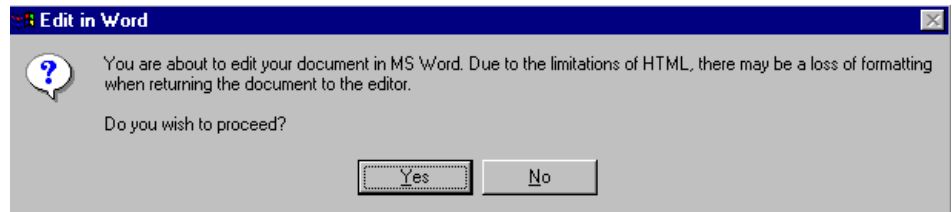
4. Microsoft Word opens. Any content that was in **eWebEditPro+XML** when you pressed the Word button is copied to Word.

5. Edit content as desired.

6. Press **File -> Close**.

7. Another warning like the one in Step 3 may appear. Press **Yes** to copy the edited content back to **eWebEditPro+XML**.

8. When done, return to **eWebEditPro+XML** and press the Word toolbar button again.

9. If you change your mind and decide to restore the content to the way it was before you edited it in Word, press the undo button (↶).

   If you want to restore the Word changes after pressing Undo, press the redo button (↷).

Uploading an Image in a Microsoft Word Document

If you insert an image into the Word content and then paste that content or save it, the following dialog box appears. The box lists all images in the content and asks if you want to copy them from your computer to your organization's Web server.

If you are ready to publish your Web content and want to display the image, click **Update Now**. If you plan to add more content later, you can click **Upload Later** and upload all images at that time.

Editing XML Documents

If your organization has implemented **eWebEditPro+XML**, you cannot edit XML documents using Microsoft Word. This is because Word does not support XML editing. If a full XML document is loaded, the Word button (W) is disabled.

If a Word document includes *some* custom/XML tags, the following dialog appears, warning you about the problem.

Edit in Word ⊠

WARNING: This content contains tags that Microsoft Word may not recognize. Microsoft Word may corrupt the content, introduce invalid tags, or may not display it at all.

Do you want to continue?

[Yes]   [No]

You can proceed and edit using Word or decide not to edit using Word.

Inserting Images

To insert a picture into the editor, place the cursor where you want the image to appear and click the Insert Picture button

( ). When you click the button, one of the two Picture Properties dialog boxes illustrated below appears, depending on how your Webmaster has set up your system.

The dialog boxes are very similar, with the only difference being that the **Select Server File** button only appears on the second dialog box.

The **Select Server File** button appears if your upload mechanism is set to FTP. It does not appear if the mechanism is HTTP. For more information, see the **eWebEditPro+XML** Administrator Manual section "Managing Image Selection" > "Examples of Implementing Image Selection" > "Selecting Files from the Server."
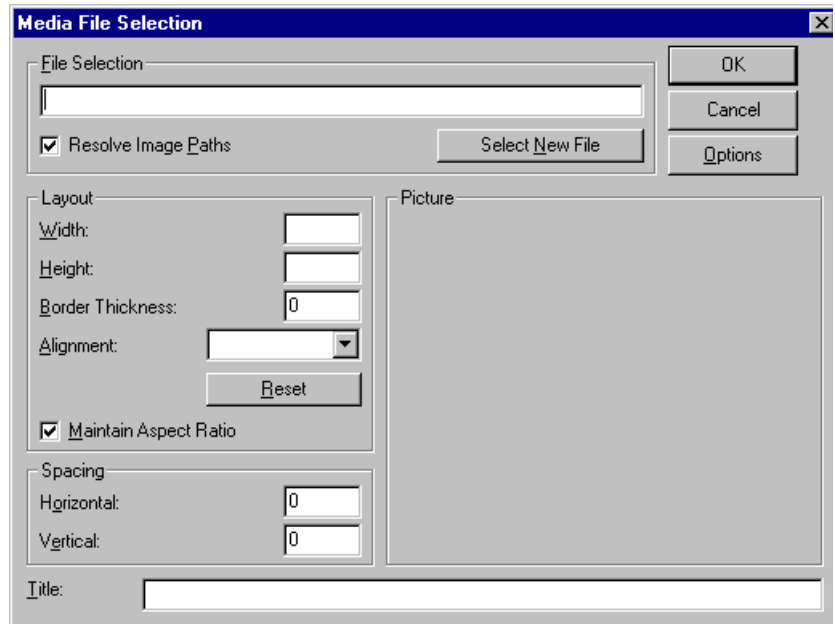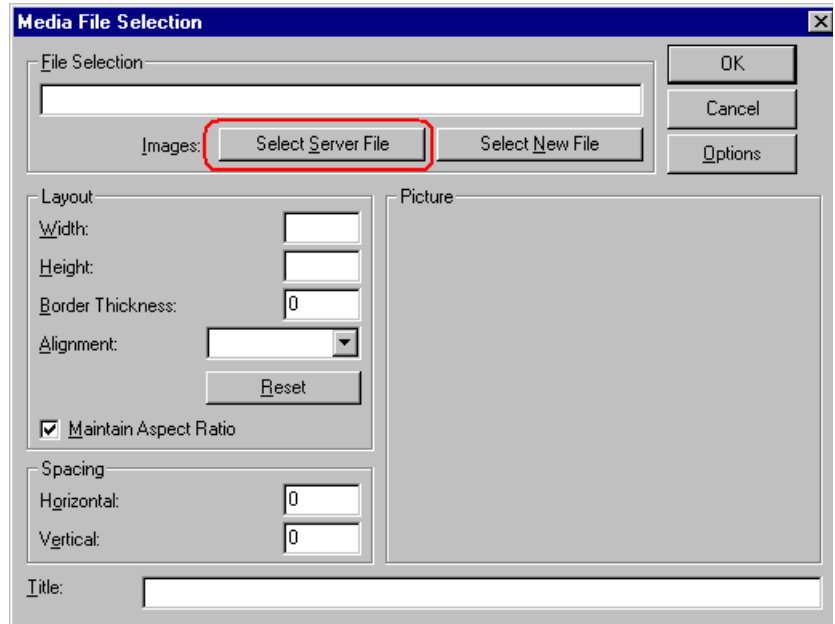
You can also access this dialog box to modify a picture after you insert it. To do this, follow these steps.

1. Click the picture.
2. Right click the mouse.
3. Click **Picture** from the menu.

If you see the first dialog box, proceed to "Using the First Picture Properties Dialog Box" on page 269. If you see the second dialog box, proceed to "Using the Second Media Selection Dialog Box" on page 273.

Using the First Picture Properties Dialog Box

When the first Picture Properties dialog box appears, click the **Select New File** button. When you do, the Insert Media Item dialog box appears.

This box and lets you insert a picture from your computer (and any network folder available to your computer), or from the Web server

to which your computer is connected. Both choices are described below.
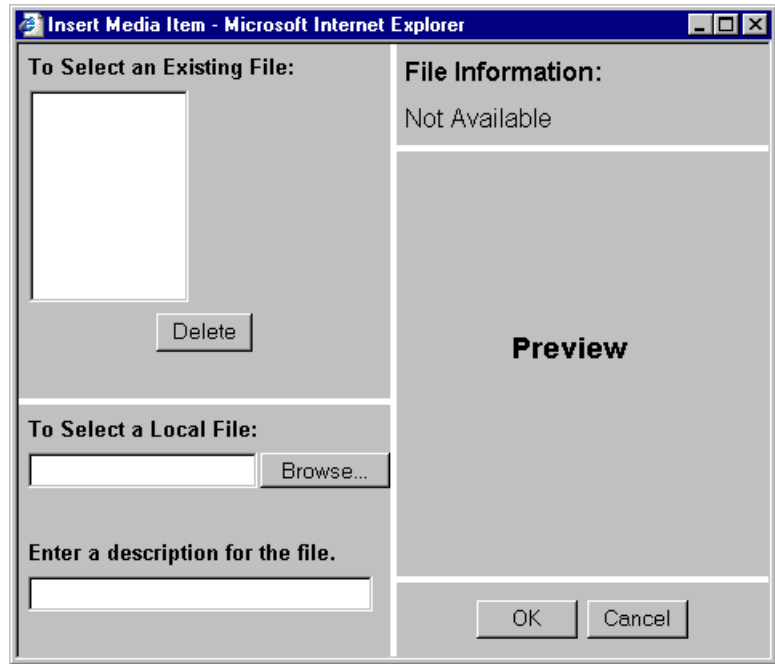
Inserting a Picture from the Server

The top left corner of the dialog box (Illustrated below) lists the pictures on the Web server.

Pictures that you previously inserted appear on this list, as do pictures inserted by other users connected to that server.

To insert a picture from the server, follow these steps.
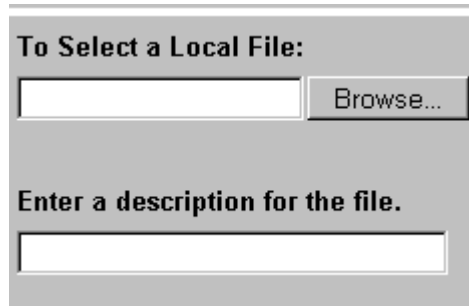
1. Click the picture from the **To Select an Existing File** field that you want to insert.

2. Information about the picture's file size, width and height appears in the upper right corner of the dialog box.

3. If you want to view a picture before inserting it, click **Preview** (on the right side of the dialog box).

4. Click **OK**.

5. The Picture Properties dialog box reappears. Here, you can change the properties of the picture. For more information, see

   - "Adjusting a Picture" on page 274
   - "Setting a Border" on page 276
   - "Aligning the Picture" on page 277
   - "Adding Space around the Picture" on page 279

6. Click **OK** to insert the picture into the editor.

Deleting a Picture from the Server

To delete a picture from the server, select the picture and click the **Delete** button.

Inserting a Picture from Your Computer

Use the lower left corner of the dialog box to insert pictures from your computer (and any network folder available to your computer) into the editor.

To Select a Local File:

[   ] Browse...

Enter a description for the file.

[   ]

To insert a picture from your computer, follow these steps.

1. Click the **Browse** button.

2. Navigate to the file that you want to insert and press **Open** to insert it.

   Your Webmaster can set a maximum size (in kilobytes) for images. If you select an image that exceeds the maximum, an error message appears and you cannot insert it.

   Your Webmaster can also restrict the type of image file you can insert. For example, if your Webmaster does not authorize you to insert bitmap (.bmp) files and you try to do so, an error message lists valid file extensions, and you cannot insert the image.

Microsoft Internet Explorer   ✕

   ⚠️   You have not selected a file with one of the valid extensions: gif,jpg,png,jpeg,jif

   [OK   ]
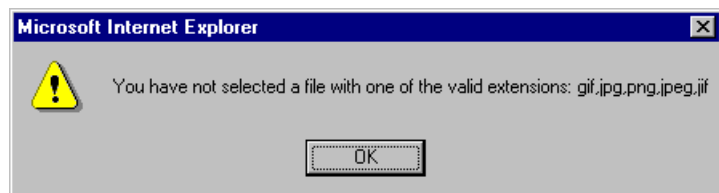
3. Click in the **Enter a description for the file** field. Enter a title to describe the file.

4. After you insert the picture, the title appears in the dialog box's top left corner to identify the picture to you and all users connected to the same Web server.

The title is also the `alt` text for the image. The `alt` text appears in place of the image on the Web page if the image itself cannot display for any reason.

5. Information about the picture's file size, width and height appears in the upper right corner of the dialog box.

6. If you want to view a picture before inserting it, click **Preview** (on the right side of the dialog box).

7. Click **OK**.

8. The Picture Properties dialog box reappears. Here, you can change the picture's properties. For more information, see

   - "Adjusting a Picture" on page 274
   - "Setting a Border" on page 276
   - "Aligning the Picture" on page 277
   - "Adding Space around the Picture" on page 279
   - "Editing the Picture's Title" on page 280

9. Click **OK** to insert the picture into the editor.

Using the Second Media Selection Dialog Box

When using the second Media Selection dialog box, you can insert a picture from any folder available to your computer (whether the folder is on your computer or a remote computer) or from the Web server. Your Webmaster determines which pictures are available on the Web server.

To insert a picture from

- a folder available to your computer, click **Select New File**, navigate to the file of interest, and click **OK**.

- the Web server, click the **Select Server File** button. You are prompted to enter a **User Name** and **Password**. Your Webmaster assigns these codes to you, which are needed to copy the file to the Web server.

  Next, the Image Explorer dialog appears (illustrated below). Navigate through the folder structure until you find the image. Then click **OK** to insert the image into **eWebEditPro+XML**.
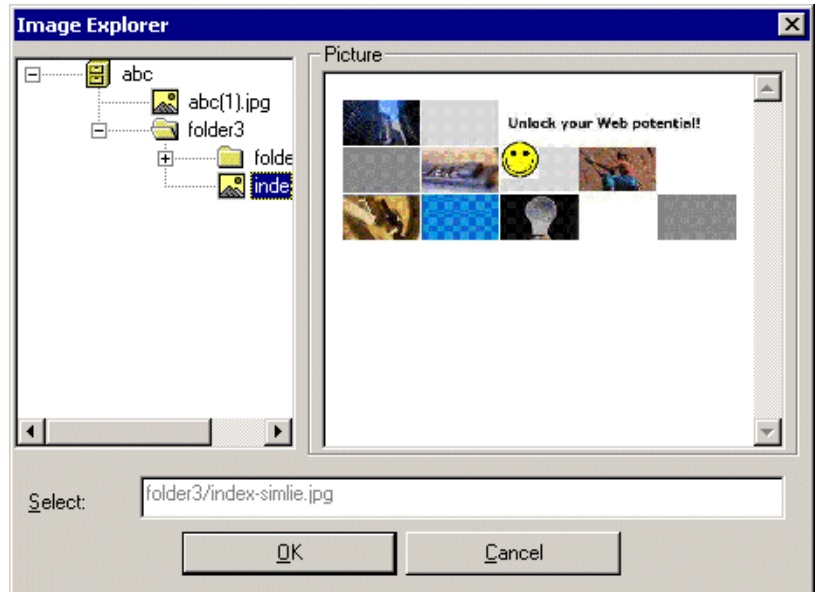
The Picture Properties Dialog Box

You can also use the Picture Properties dialog box to

- adjust the picture's width, height, border thickness, and alignment
- reset the image's properties width, height, border thickness, and alignment to their original specifications
- set spacing between the picture and surrounding information on the page
- enter or edit the picture's title
- view technical information about your connection

Adjusting a Picture

The layout area of the Picture Properties dialog box lets you adjust a picture's width, height, border thickness, and alignment.

You can use the following fields to adjust the picture before inserting it into the editor.

To make this change	Use this field
The width of the picture, in pixels	**Width**
The height of the picture, in pixels	**Height**
Add a border around the picture	**Border Thickness** For more information, see "Setting a Border" on page 276
Adjust the alignment of the picture	**Alignment** For more information, see "Aligning the Picture" on page 277

WARNING! If you substantially adjust the picture's height and/or width, the picture may be distorted when users view your Web page.

Pixels

A pixel is a single point in a graphic image.

Computer monitors display pictures by dividing the screen into thousands of pixels, arranged in rows and columns. The pixels are so close together that they appear connected.

Below is an image shown at regular size and then enlarged so you can see the pixels that make up the picture.
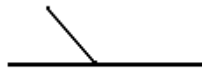
regular size
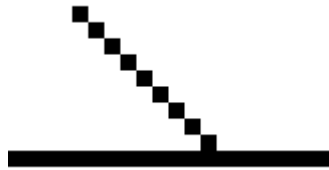
enlarged to show pixels

Setting a Border

To add a border around a picture, enter the border's thickness in pixels in the **Border Thickness** field on the Picture Properties dialog box.

Here is a picture with a 1 pixel border.

Here is the same picture with a 10 pixel border.

If the picture is not a hyperlink, its border is black. If the picture is also a hyperlink, the border is the same color as a hyperlink (for example, blue or purple if visited).

Aligning the Picture

To align a picture, use the **Alignment** field on the Picture Properties dialog box.
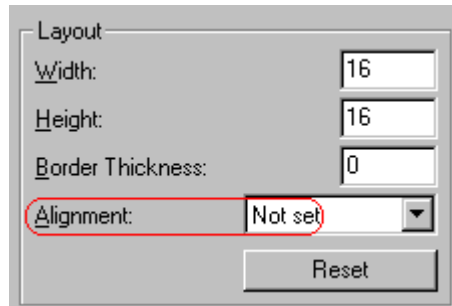
When deciding how to align a picture, you need to become familiar with these terms.

- *baseline* of text - the imaginary line on which the text lies. Some letters (such as g, p and y) have *descenders*, segments of letters that extend below the baseline

- *bottom* of text - the lowest section of a line to which a descender extends

- *top* of text - the highest spot of a line to which any segment of a letter extends

- *vertical center* - the midpoint between the top and bottom of the line

The following table lists your alignment choices.

To align	Click this in the Alignment field	Illustration
The picture on the left margin, allowing subsequent text to wrap around it	**Left**	
The picture on the right margin, allowing subsequent text to wrap around it	**Right**	
The top of the picture with the top of the text	**Text Top, Top**	
The vertical center of the picture with the *baseline* of the text	**Middle**	
The vertical center of the picture with the *vertical center* of the text	**AbsMiddle**	
The bottom of the picture with the *baseline* of the text (This is the default alignment)	**Bottom, Baseline**	
The bottom of the picture with the *bottom* of the text	**AbsBottom**	

Resetting Width, Height, Border Thickness, and Alignment

If you adjust the picture's width, height, border thickness, and/or alignment and later want to restore *all* of those settings to their original values, click the **Reset** button.
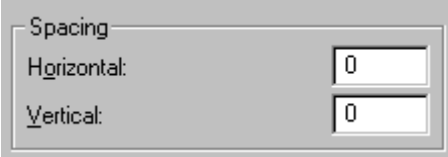
Note that you cannot selectively restore some settings -- the **Reset** button automatically restores all of them.

Adding Space around the Picture

On the Picture Properties dialog box, you can use the **Spacing** fields (**Horizontal** and **Vertical)** to add space around the picture. You enter a number of pixels to determine spacing value.

The following graphic illustrates the effect of adding spacing to a picture.

This image has no vertical or horizontal space

This image has 20 pixels of vertical space, no horizontal space

This image has 20 pixels of horizontal space, no vertical space

This image has 20 pixels of vertical space and 20 pixels of horizontal space
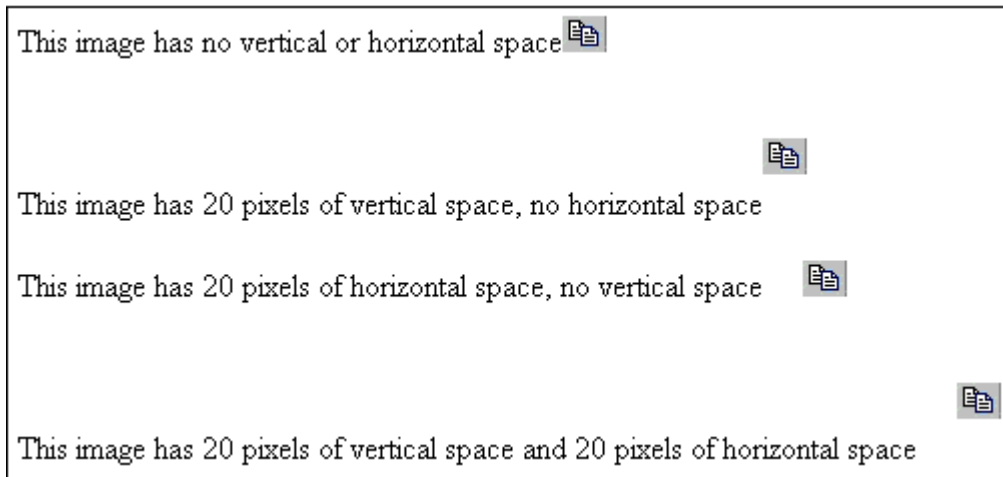
Editing the Picture's Title

The title that you entered in the Insert Media Item dialog box defaults into the **Title** field of the Media Selection dialog box. You can edit the title in this field if desired.

NOTE   The title is also the `alt` text for the image. The `alt` text appears in place of the image on the Web page if the image itself cannot display for any reason.

The Options Button

When you click the **Options** button on the File Properties dialog box, the options dialog box appears. The box displays information about your connection to the Web server.
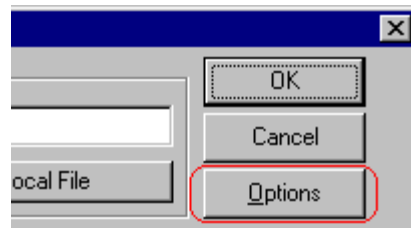
For information about these settings, see "Uploading Images" in the **eWebEditPro+XML** Developer's Reference Guide.

Moving an Image to the Server

If you insert an image from your computer into **eWebEditPro+XML** content, that image must be moved to the server when you save the content. The image can only appear on Web pages that display it after you move it to the server.

When you save content that incudes an image you inserted, the following dialog appears.
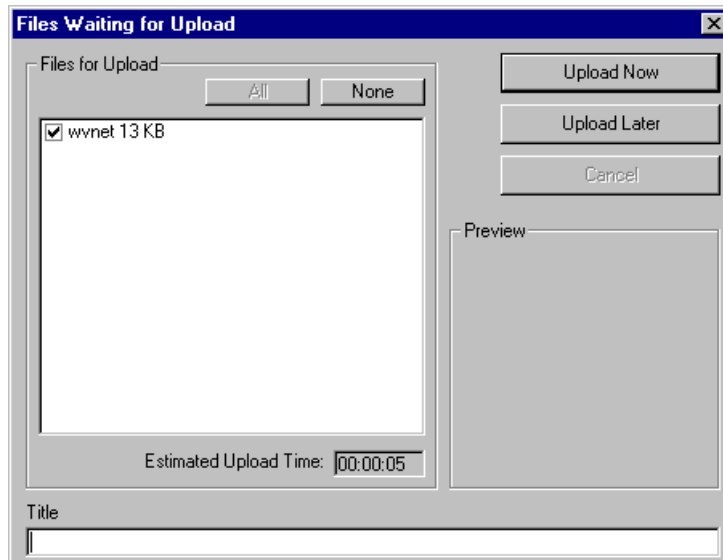
All inserted files appear in the dialog, which also estimates how long it will take to move the files to your server. If you do not want to wait that long to upload the files, click **Upload Later**. If you do this, the images will not appear on the published Web content until you move them to the server.

You can also enter a **Title** for the image near the bottom of the screen. If you do, this text appears when the user reading the Web pages moves the cursor over the image.

Deleting a Picture

If you want to delete a picture, follow these steps.

1. Move the cursor over the picture.

2. Click the mouse to select the picture.

3. Click the Cut button ( ).

Editing Images

WebImageFX lets you select an image from the content, edit that image, and then insert the updated image into the content. Editing consists of several functions available on the toolbar, such as

- brightening
- rotating
- changing the color depth
- inserting text

This section explains WebImageFX.

Important! WebImageFX is an external, add-on product available from Ektron.

Using WebImageFX

Choosing the Image

If you double click an image, it appears within WebImageFX. You can also right click the mouse and choose **Image Editor** from the menu that appears.

Menus
Cut
Copy
Paste
Paste Text
Select All
Clean HTML
Hyperlink...
Insert HTML...
✔ View as WYSIWYG
View as HTML
Picture...
(Image Editor)
Insert Custom Tag...

WebImageFX looks similar to **eWebEditPro+XML** but has different menu and toolbar buttons.
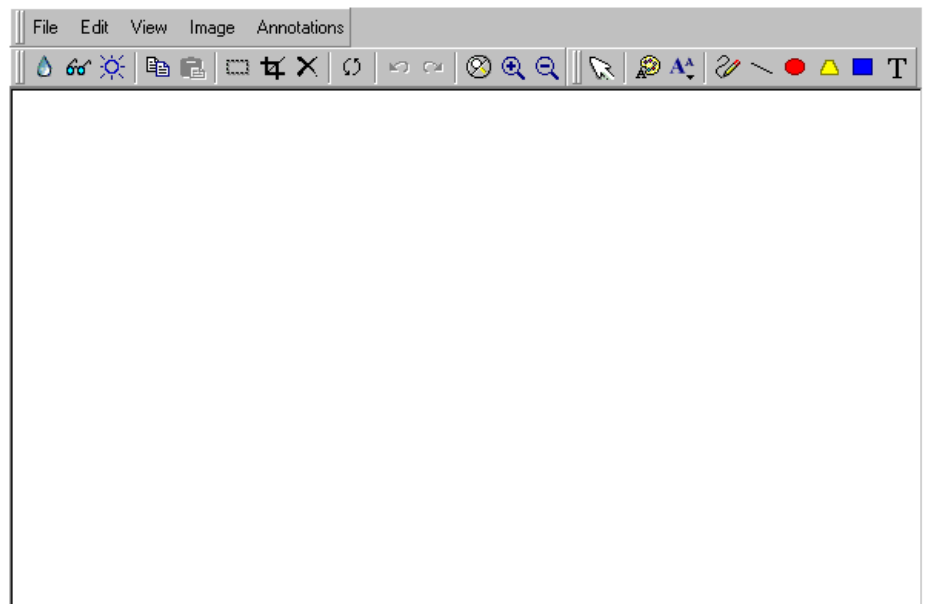
If the Image Edit button ( ) appears on your toolbar, you can click it to open WebImageFX. If no image is selected when you press the button or click the menu command, a blank editor appears, and you can use the **File -> Open** command to choose an image.

Once the image is in WebImageFX, you can use the buttons and menu options to edit it. The rest of this chapter describes those buttons and menu options.

Saving the Image

When you finish editing the image, you can insert it into the content by pressing the **Exit** button ( ). Alternatively, you can save the image to a local or network folder using the Save button ( ).

When you insert the image into the content, WebImageFX checks the file extension. If the image is a .gif file, it is saved as a .png file in your temporary directory. For example test.gif is saved as `C:\Documents and Settings\`*your user name*`\Local Settings\Temp\test.png.`

Any other file type is saved in your temporary directory without changing the file extension, *unless* you use the Save As option. For example, you save test.jpg as test.png.

Assigning a Name to a New Image

If you create an image in WebImageFX, and then exit WebImageFX and return to **eWebEditPro+XML**, the system assigns the image a random name, such as WIF50A.jpg.

If you want to assign a different name and/or folder to the image, use the Save as command.

See Also: "Save As" on page 308

Toolbar Buttons and Menu Commands

The following tables list each toolbar button and menu command. They are followed by a more detailed description of each function.

File Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	Create New	Creates a new image.	"Create New" on page 295
	Open	Selects an image to edit.	"Open" on page 301
	Save	Saves changes to an image.	"Save" on page 307
	Save As	Saves the current image under a different name or format.	"Save As" on page 308
	Twain Acquire	Performs a single page scan. Before scanning, you must select a source using the Twain Source command.	"Twain Acquire" on page 313
	Twain Source	Allows the user to select a source for acquiring an image, such as a scanner or digital camera.	"Twain Source" on page 313
	Exit	Save changes and return to **eWebEditPro+XML**.	"Exit" on page 297
	Exit without save	Ignore changes; return to **eWebEditPro+XML**.	"Exit without Save" on page 298
	Thumbnail	Creates a thumbnail of the current image. Note: A thumbnail is a miniature display of an image. Thumbnails allow fast browsing though images.	"Thumbnail" on page 312

Edit Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	copy	Copies a selected area of an image.	"Copy" on page 295
	paste as new image	Inserts copied image or area into a new file.	"Paste as New Image" on page 303
	undo	Reverses the most recent action.	"Undo" on page 314
	redo	Reapplies the changes from the command that occurred before you pressed Undo.	"Redo" on page 305
	select	Selects an area of an image. You can then perform actions on the area, such as blur and delete.	"Select" on page 309
	crop	Removes everything outside of selected area of an image.	"Crop" on page 295
	delete	Deletes selected area of an image.	"Delete" on page 296

View Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	reset zoom ratio	Displays image at full size.	"Reset Zoom Ratio" on page 306
	zoom in	Increases an image's magnification.	"Zoom In" on page 314
	zoom out	Decreases an image's magnification.	"Zoom Out" on page 315

Image Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	image info	Displays information about an image.	"Image Info" on page 299
	dimensions	Modifies an image's width and height.	"Dimensions" on page 296
	color depth	Changes the number of colors available to an image.	"Color Depth" on page 293
	blur	Blurs or softens an image.	"Blur" on page 289
	sharpen	Sharpens edges within an image.	"Sharpen" on page 309
	brightness	Changes an image's brightness.	"Brightness" on page 290
	contrast	Changes the difference between light and dark areas of an image.	"Contrast" on page 294
	horizontal flip	Reverses an image horizontally left to right.	"Horizontal Flip" on page 299
	vertical flip	Flips an image vertically top to bottom.	"Vertical Flip" on page 314
	rotate	Turns an image a specified number of degrees.	"Rotate" on page 306

Annotation Menu Options

Toolbar Button	Command	Brief Description	For more information, see
	pointer selection	Click an annotation to select it.	"Pointer Selection" on page 303
	choose color	Sets the color for an annotation before you insert it.	"Choose Color" on page 291
	choose font	Sets the color of text before you insert it.	"Choose Font" on page 292
	freehand	Draws a line in any shape that you want.	"Freehand" on page 298
	line	Draws a straight line.	"Line" on page 300
	oval	Draws an oval.	"Oval" on page 302
	polygon	Draws a polygon (a closed figure surrounded by straight lines).	"Polygon" on page 304
	rectangle	Draws a rectangle.	"Rectangle" on page 305
	text	Inserts text.	"Text" on page 310

Blur

Standard Toolbar Button

Description

Blurs or softens an image. You can select a level of blur, from 0 through 4.

If you select an area of the image, the command only changes that area.

Dialog Box
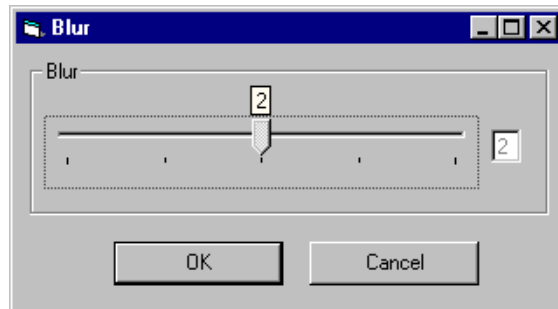
Brightness

Standard Toolbar Button

Description

Increases or decreases an image's brightness. You can select a brightness level from 32 (brightest) through -32 (darkest).

If you select an area of the image, the command only changes that area.

NOTE You cannot adjust brightness if the image's bit depth is 8 or fewer. *See Also:* "Specifying Color Depth" on page 315

Dialog Box
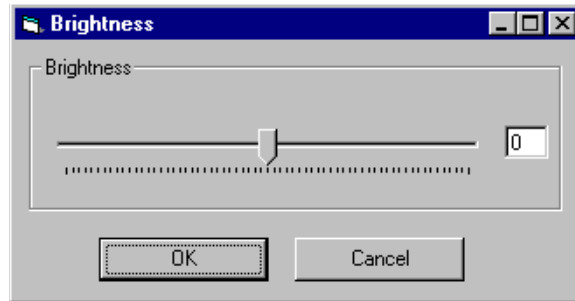
Choose Color

Standard Toolbar Button

Description

Lets you choose the color of an annotation before you insert it.

To change an annotation's color *after* inserting it, place the cursor on the annotation and press the right mouse button to display the Attributes menu.

Dialog Box

Choose Font

Standard Toolbar Button

A

Description

Lets you choose the color of annotation text before you insert it.

To change an annotation's color *after* inserting it, place the cursor on the annotation and press the right mouse button to display the Attributes menu.
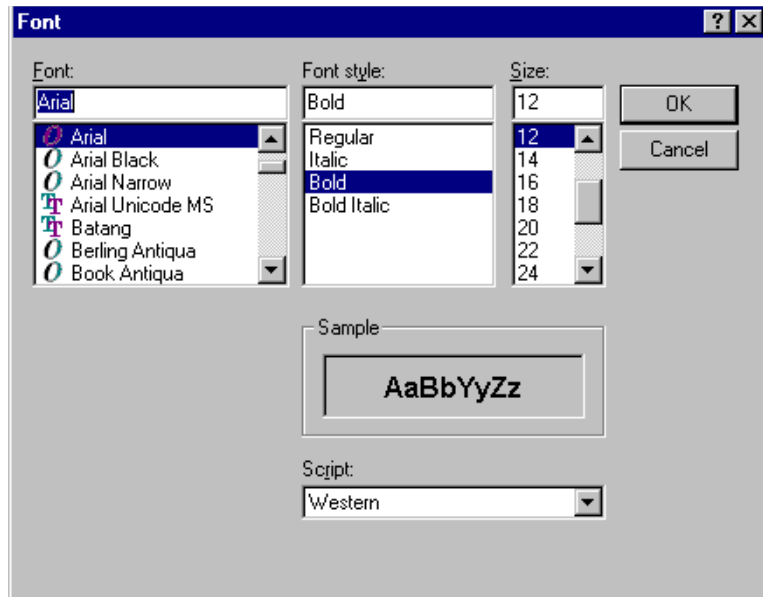
Dialog Box

Color Depth

Standard Toolbar Button

Description

Changes an image's color depth.

See Also: "Specifying Color Depth" on page 315

Dialog Box
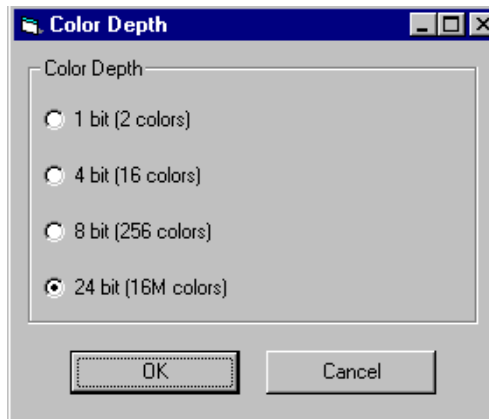
Contrast

Standard Toolbar Button

Description

Increases or decreases an image's contrast (that is, the difference between light and dark areas of an image). You can select a contrast level, from 10 through -10.

If you select an area of the image, the command only changes that area.

Dialog Box
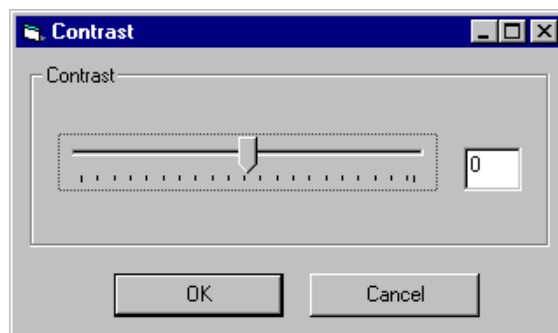
Copy

Standard Toolbar Button

Description

Copies a selected area of an image. After you copy an image, you can paste it using the paste command. *See Also:* "Paste as New Image" on page 303

To select an area of an image, use the Select command. *See Also:* "Select" on page 309

If you do not select an area, the entire image is copied.

Create New

Standard Toolbar Button

Description

Lets you create a new image. If you are editing an image when you press this command, you are asked if you want to save changes to it first.

By default, a new image's bit depth is 24, but you can change it if desired using the color depth command.

See Also: "Color Depth" on page 293

Crop

Standard Toolbar Button

Description

Keeps selected area of an image; removes everything outside that area.

To use the Crop command, follow these steps.

1. Select an area of an image that you want to keep.

2. Press the Crop button (⌗).

3. Everything outside the selected area is removed.

Delete
Standard Toolbar Button

✕

Description

Removes a selected area of an image. You must select an area before you delete it.

The deleted area is not saved for later pasting. In contrast, if you use the Cut command, you can later paste the cut area.

Dimensions
Standard Toolbar Button

✛

Description

Lest you change an image's width and/or height, which are defined in pixels.

Maintaining Aspect Ratio

Use this check box to change an image's size while maintaining its *aspect ratio.*

Aspect ratio is the ratio of an image's width to height. For example, if a graphic has an aspect ratio of 2:1, its width is twice as large as its height.

If you check the **Maintain Aspect Ratio** box, just specify a new width -- the height is calculated automatically.

Dialog Box
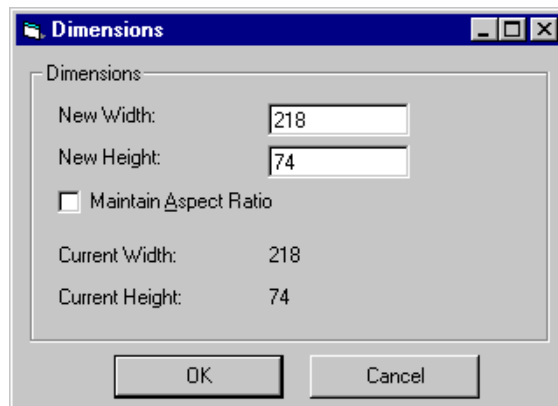
Exit

Standard Toolbar Button

Description

Save the change in the WebImageFX and return to **eWebEditPro+XML**, where the updated image appears.

Exit without Save

Standard Toolbar Button

Description

Ignore changes made to the image in WebImageFX. Return to eWebEditPro+XML.

Freehand

Standard Toolbar Button

Description

Lets you draw a line in any shape that you want, similar to using a pen on paper.

To use this command, click the freehand command, drag the line, and release the mouse. To change the line's size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box

Attributes ✕

Line Attributes | Color Attributes

Line Size

[11] ▲▼

☑ Highlight

OK | Cancel
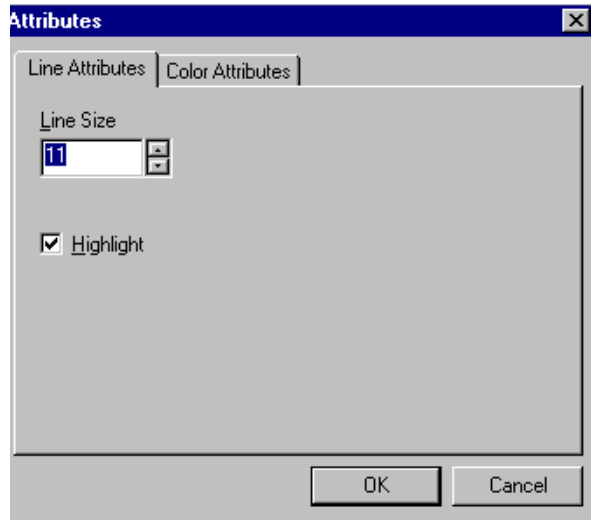
Horizontal Flip

Standard Toolbar Button

Description

Reverses an image horizontally left to right.

Click this command again to reverse the image horizontally right to left.

Image before horizontal flip

Image after horizontal flip

Image Info

Standard Toolbar Button

Description

Displays information about an image:

- image name
- height and width in pixels
- bit depth (*See Also:* "Specifying Color Depth" on page 315)
- file format

Line

Standard Toolbar Button

Description

Draw a straight line. To change a line's size or color, right click it after drawing it.

To use this command, click the line command, drag the line, and release the mouse. To change the line's size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box

Attributes

Line Attributes | Color Attributes

Line Size

11

☑ Highlight

OK   Cancel
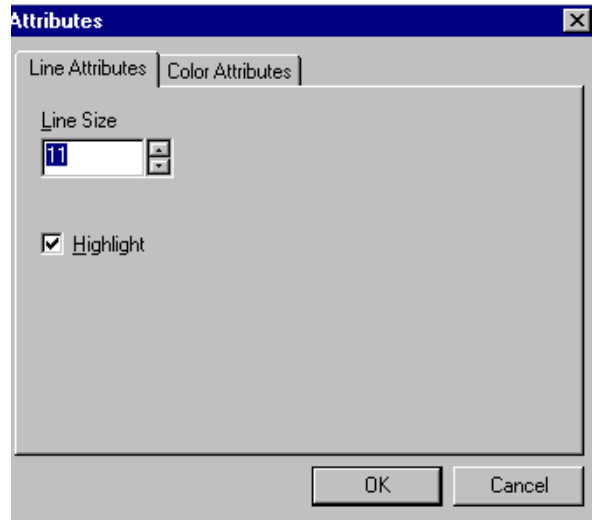
Open

Standard Toolbar Button

Description

Select an image for editing. The image can be on your computer or a local area network.

Dialog Box
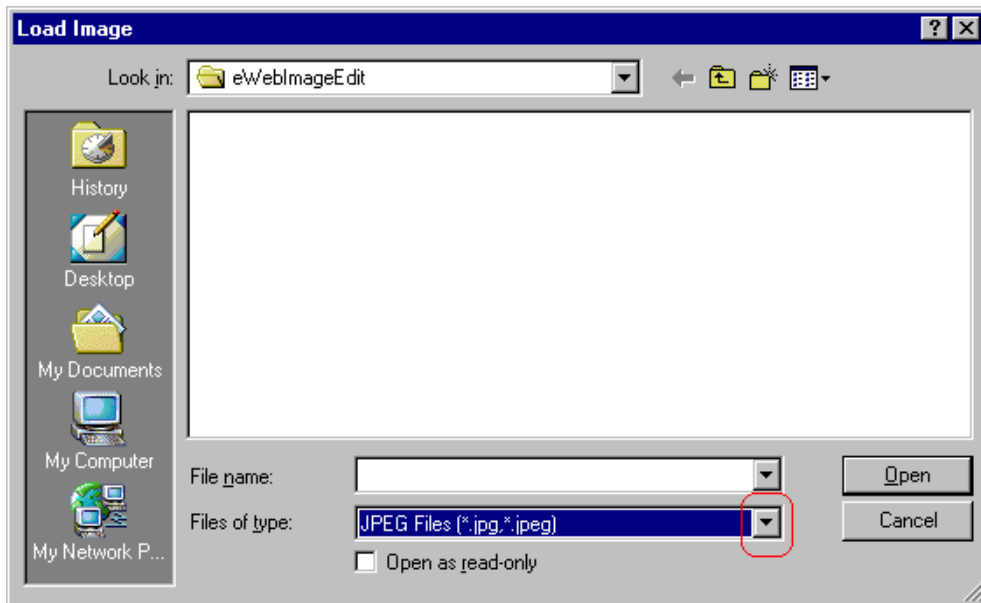
To change the type of file that appears in the window, click the down arrow (circled above) to the right of the **Files of type** field. Your system administrator determines which types of files you can edit.

Oval

Standard Toolbar Button

Description

Draws an oval.

To use this command, click the oval command, drag the line, and release the mouse. To change the oval's line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box
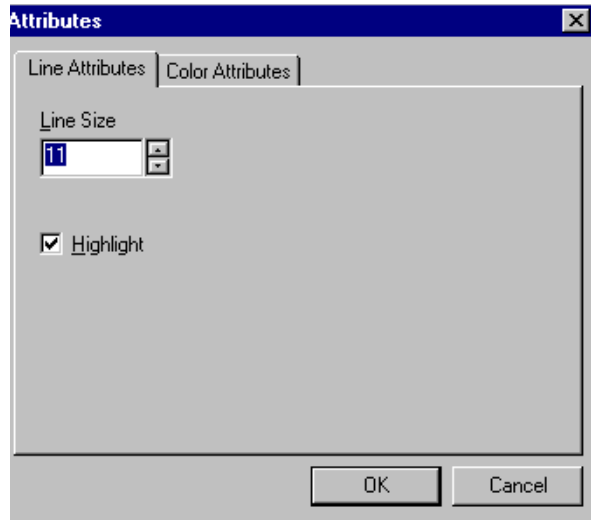
Paste as New Image

Standard Toolbar Button

Description

After you copy or cut an image or an area of an image, use paste as new image to insert it into a new file.

Before creating a new file, WebImageFX asks if you want to save changes to current file.

Pointer Selection

Standard Toolbar Button

Description

Click an annotation to select it. After you select an annotation, you can perform functions on it, such as delete it.

This command is a toggle, which means the the first time you click it, it is on, and the next time you click it, it is off.

Polygon
Standard Toolbar Button

Description

Draws a polygon (that is, a closed figure surrounded by straight lines).

To use this command, follow these steps.

1. Click the polygon command.
2. Drag the line in one direction as far as you want.
3. Drag the line in the other directions to complete the polygon.
4. Double click the mouse to terminate the polygon.
5. To change the polygon's line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box
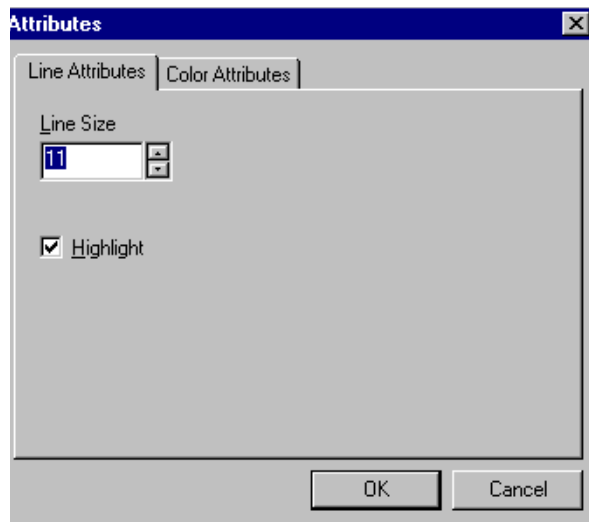
Rectangle

Standard Toolbar Button

Description

Draws a rectangle.

To use this command, click the rectangle command, drag a rectangle, and release the mouse. To change the rectangle's line size or color, place the cursor on the line and press the right mouse button to display the Attributes menu.

Dialog Box
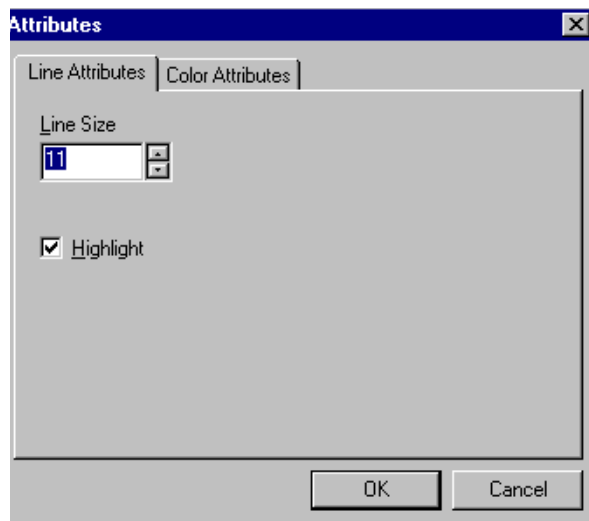
Redo

Standard Toolbar Button

Description

If you use the Undo command and then decide that it was a mistake, use this command. It re-applies the changes from the command that occurred before you pressed Undo.

See Also: "Undo" on page 314

Reset Zoom Ratio

Standard Toolbar Button

Description

Displays image at full size.

See Also: "Zoom In" on page 314; "Zoom Out" on page 315

Rotate

Standard Toolbar Button

Description

Turns an image a specified number of degrees. Note that the dialog box lets you rotate the image

- left or right
- 90, 180, or 270 degrees
- any number of degrees between 1 and 359

Dialog Box
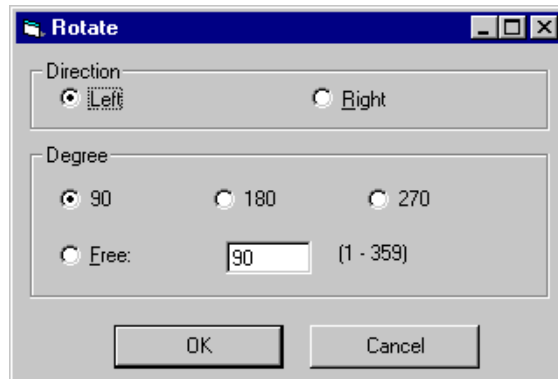
Save

Standard Toolbar Button

Description

Save changes to an image. If required information is missing, such as the image name, you are prompted for this information.

Dialog Box
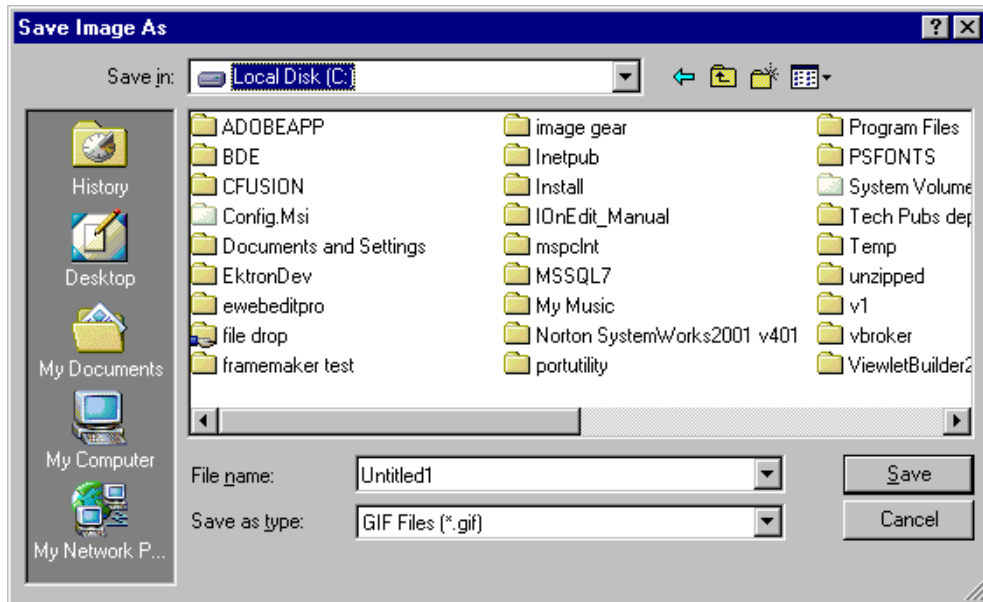
NOTE The dialog box only appears the first time you save the image. If you later want to save it to a different folder, or under a different name or file type, use the Save As command.

Save As

Standard Toolbar Button

Description

Save the current image under a different name or format. For example, you might save mypicture.gif as mypicture.jpg.

Your system administrator determines which file formats are available.

Dialog Box

See "Save" on page 307

Select

Standard Toolbar Button

Description

Selects an area of an image. You can then execute other commands on the selected area, such as blur, sharpen, cut, and delete.

NOTE   Once you press the Select command, it remains selected and continues to be active until you press it a second time.

Sharpen

Standard Toolbar Button

Description

Sharpens edges within an image. You can select a level of sharpness, from 1 through 5.

Sharpening brings an image into better focus and increases the detail.

If you select an area of the image, the command only changes that area.

Dialog Box
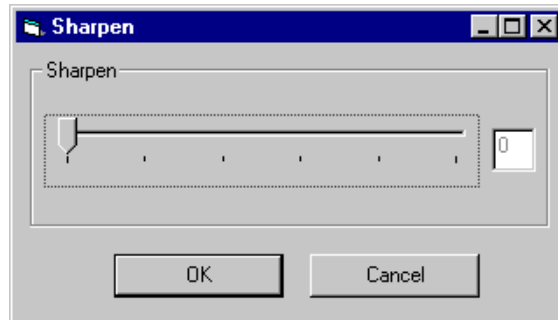
Text

Standard Toolbar Button

T

Description

Places text on an image. You can also change the text's size, font, color, and attributes (bold, italic, etc.).

To use the Text command, follow these steps.

1. Click the Text button ($\mathbf{T}$).
2. Move the cursor to where you want to place the text.
3. Click the mouse button and drag a rectangle in which to insert the text.

NOTE   Make sure the rectangle is large enough to accommodate your text. The rectangle disappears after you enter text.

4. Type the text.
5. Click outside the rectangle to close it.
6. To change the text or its font, size, style, color, etc., place the cursor over the text and right click the mouse. The text attributes dialog appears.

Dialog Box
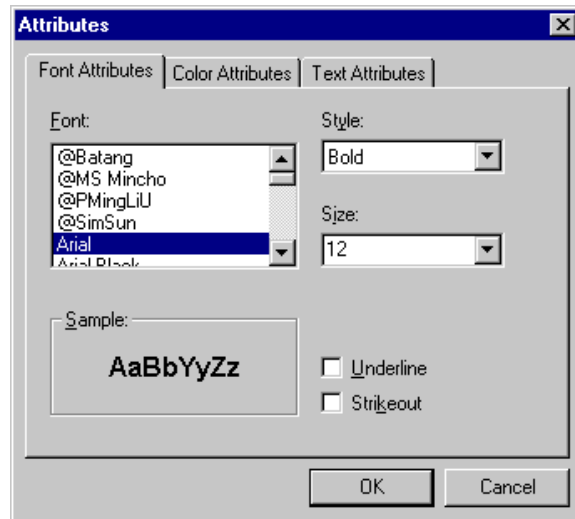
The following table lists functions you can perform with this dialog.

To change this	Use this tab/field
font	**Font Attributes/Font**
font size	**Font Attributes/Size**
font style (**bold**, *italic*, etc.)	**Font Attributes/Style**
underlining	**Font Attributes/Underline**
strikeout (for example, ~~sample~~)	**Font Attributes/Strikethrough**
font color	**Color Attributes/Primary Color**
text	**Text Attributes**/*white box*
if text wraps when it reaches the end of a line	**Text Attributes/ Wrap**

Thumbnail

Standard Toolbar Button

Description

Create a thumbnail of the current image. A dialog box prompts you to define the thumbnail.

Dialog Box
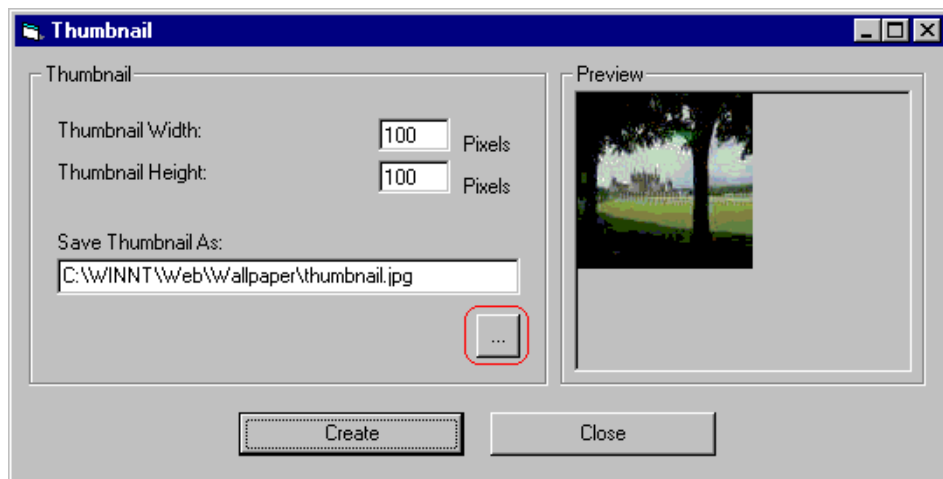
To create a thumbnail, follow these steps.

1. Define the size of the thumbnail. 100 x 100 pixels is the standard size, but you can change it.

2. Assign the thumbnail a name and folder location using the **Save Thumbnail As** field. To change the default name, you can either type the new file name into the field or click the button with the three dots (circled above) and navigate to a different folder.

3. Click **Create**. When you do, the image appears in the **Preview** box so that you can see what it will look like.

Twain Acquire

Standard Toolbar Button

Description

Perform a single page scan from a previously selected source.

See Also:

Importing Scanned Images

WebImageFX lets you acquire images from a scanner or digital camera that supports the Twain standard. You select the source (using Twain Source) and do a quick acquire from that source (using Twain Acquire).

Limitations

- You can only acquire one page at a time
- Few digital cameras support twain. Usually, digital cameras resemble a hard drive or use proprietary software to extract images. Ektron does not support an interface to proprietary software.
- Not all scanners support the twain standard

Twain Source

Standard Toolbar Button

Description

Lest you select a source for acquiring an image, such as a scanner or digital camera.

See Also:

Undo

Standard Toolbar Button

↶

Description

Reverses the most recent commands within the current editing session.

You can undo several commands at once by pressing the undo command repeatedly. The first time you press the command, the most recently completed command is "undone." The next time, the second most recently completed command is "undone", etc.

See Also: "Redo" on page 305

Vertical Flip

Standard Toolbar Button

↕

Description

Flips an image vertically top to bottom.

Click this command again to reverse the image vertically bottom to top.

Image before vertical flip **A**

Image after vertical flip **Ɐ**

Zoom In

Standard Toolbar Button

🔍

Description

Increases an image's magnification.

You can press this command several times to continue to increase magnification.

See Also: "Zoom Out" on page 315; "Reset Zoom Ratio" on page 306

Zoom Out

Standard Toolbar Button

Decrease an image's magnification.

You can press this command several times to continue to decrease magnification.

See Also: "Zoom In" on page 314; "Reset Zoom Ratio" on page 306

Specifying Color Depth

To specify an image's color depth (that is, the number of colors available to an image), specify a *bit depth*. The color depth is derived from the bit depth. Here are the bit depth values.

Bit depth	Color depth
1	2 colors
4	16 colors
8	256 colors
24	16M colors

Introduction to Tables

Sometimes, the information on your Web page looks better when displayed on a table. Here is an example.

City	Baseball Team	Hockey Team
Boston	Red Sox	Bruins
New York	Yankees / Mets	Rangers
Chicago	White Sox / Cubs	Black Hawks
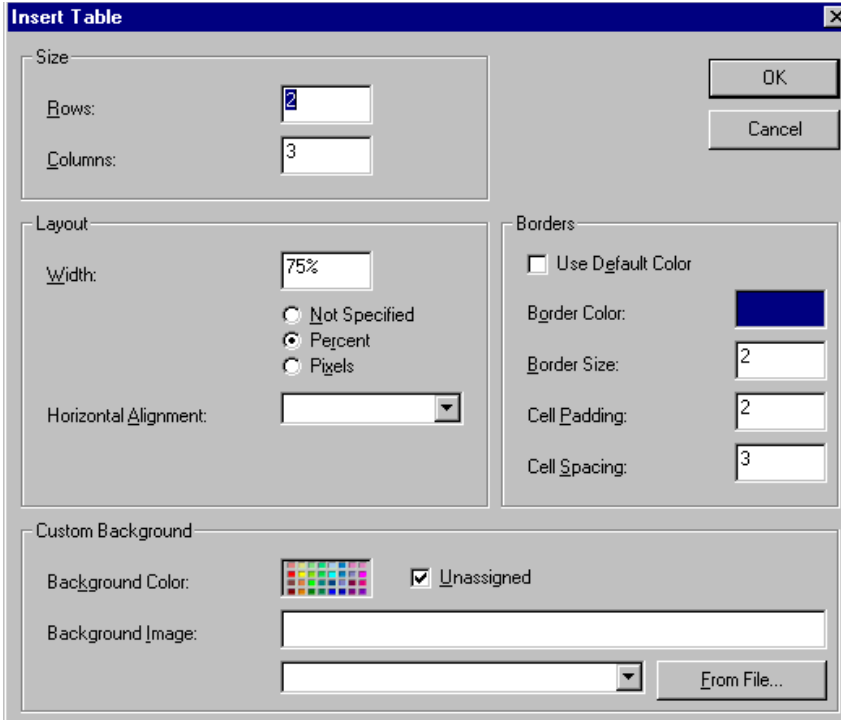
This section explains

- Creating a Table
- Deleting a Table
- Inserting a Table within a Table

See Also: "Table Dialog Boxes and Menus" on page 320, "Manipulating Your Table's Format" on page 327, "Working with Table Cells" on page 342 and "Section 508 Tables" on page 377

Creating a Table

To create a table, click the table button (![icon]) then click **Insert Table** from the menu. When you do, the Insert Table dialog box appears.

You can also access this dialog box after you insert it. You would do this if you wanted to edit any of the information entered in the dialog.

To access this dialog after insertion, follow these steps.

1. Click the table.
2. Right click the mouse.
3. Click **Table Properties** from the menu.

When creating a table, you can specify the

- number of rows and columns

- width
- horizontal alignment on the page
- background color or background picture
- border size and color

For more information about managing tables, see "Manipulating Your Table's Format" on page 327.

For more information about managing individual cells within a table, see "Working with Table Cells" on page 342.

Deleting a Table

To delete a table, follow these steps

1. Move the cursor over the table until the cursor becomes a four-headed arrow (⬌).

2. Click the mouse button. The table becomes selected (small squares appear around it).
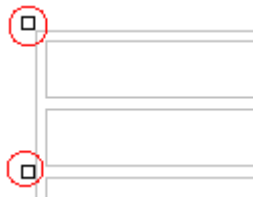
3. Press <Delete>.

Inserting a Table within a Table

You can insert a table within a table. You might want to do this to arrange text in columns.

NOTE HTML does not let you use tabs or spaces to align text in columns. You must use a table to align columns. You can remove the table's border, so that no lines appear between the columns and rows.

To insert a table within a table, follow these steps.

1. Place the cursor in the cell into which you want to insert a table.

2. Click the Insert Table button (⊞).

3. Click **Insert Table** from the menu.

Insert Table...

Insert Row
Insert Column
Insert Cell

Delete Rows
Delete Columns
Delete Cells

Merge Cells
Split Cell

Table Properties...
Cell Properties...
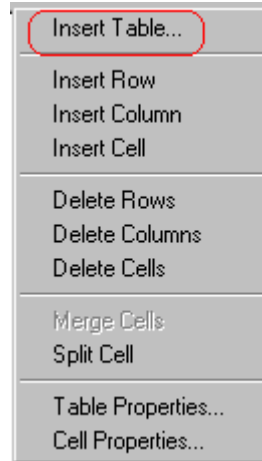
4. The Insert Table dialog box appears.

5. Edit the fields in the dialog box as needed. Then, click **OK**.

Table Dialog Boxes and Menus

This section explains the menu options and dialog boxes you use to manipulate tables and cells. In most cases, you are referred to another section that describes the feature in more detail.

This section explains

- The Insert Table Menu
- The Table Properties Dialog Box
- The Cell Properties Dialog Box
- The Table Context Sensitive Menu

The Insert Table Menu

You access the Insert Table menu by clicking on the Insert Table button (⊞) while the cursor is inside a table.

NOTE Before you click the button, make sure the table is not selected (that is, the table is not surrounded by small boxes).

When you do, the following menu appears.
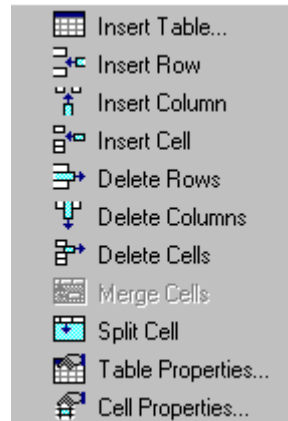
The following table lists the menu options and where to get more information on each.

Menu Option	Description	For more information, see
Insert Table	Inserts a new table where the cursor is currently resting	"Creating a Table" on page 317
Insert Row	Creates a new table row above the row in which the cursor is currently resting	"Adding or Removing Rows and Columns" on page 328
Insert Column	Creates a new table column next to the column in which the cursor is currently resting	"Adding or Removing Rows and Columns" on page 328
Insert Cell	Inserts a cell to the left of the cursor in a table	
Delete Rows	Deletes table row in which the cursor is currently resting	"Adding or Removing Rows and Columns" on page 328
Delete Column	Deletes table column in which the cursor is currently resting	"Adding or Removing Rows and Columns" on page 328
Delete Cells	Deletes the selected cells	
Merge Cells	Combines the contents of two or more selected cells into one	"Merging Two Cells" on page 357

Menu Option	Description	For more information, see
Split Cell	Divides a cell into two. Each cell occupies one half the size of the original cell.	"Splitting a Cell" on page 356
Table Properties	Displays and lets you edit table properties, such as the number of rows and columns, cell padding, and borders.	"The Table Properties Dialog Box" on page 322
Cell Properties	Displays and lets you edit cell properties, such as width and alignment	"The Cell Properties Dialog Box" on page 324

The Table Properties Dialog Box

The Insert Table dialog box lets you manipulate most elements of a table's appearance.
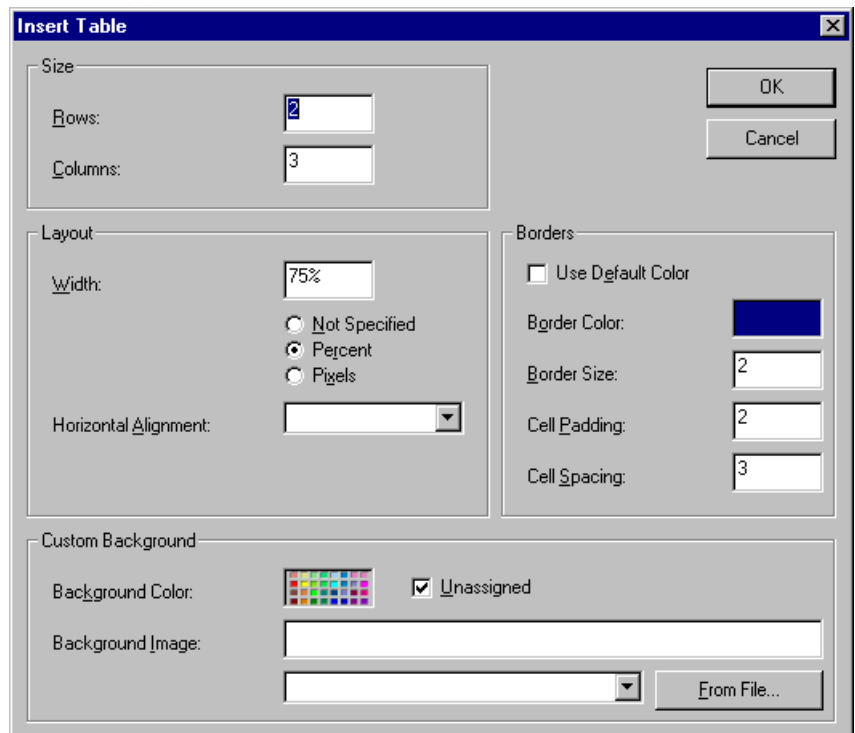
The following table lists the fields on this dialog box and refers you to the section that explains each field.

Field(s)	Lets you specify	For more information, see
Size: Rows, Columns	The number of rows and columns in the table	"Choosing the Number of Rows and Columns" on page 327
Layout: Width	Table width	"Specifying Table Width" on page 329
Layout: Horizontal Alignment	The table's alignment across the Web page	"Setting Horizontal Alignment" on page 353
Background Color	The background color of the table	"Specifying a Table's Background Color" on page 335
Background Image	A background image for the table	"Specifying a Background Image for a Table" on page 336
Borders: Use Default Color	Whether or not to use the default color (gray) for table borders	
Border Color	If you do not use the default, the color of the table border	"Assigning Border Color" on page 338
Border Size	The size of the table border	"Assigning Border Size" on page 340
Cell Padding	The space (in pixels) between the cell text and a cell's border	"Assigning Cell Padding" on page 360
Cell Spacing	The space (in pixels) between a cell and surrounding cells	"Assigning Cell Spacing" on page 360

The Cell Properties Dialog Box

The Cell Properties dialog box lets you manipulate most elements of a cell's appearance.
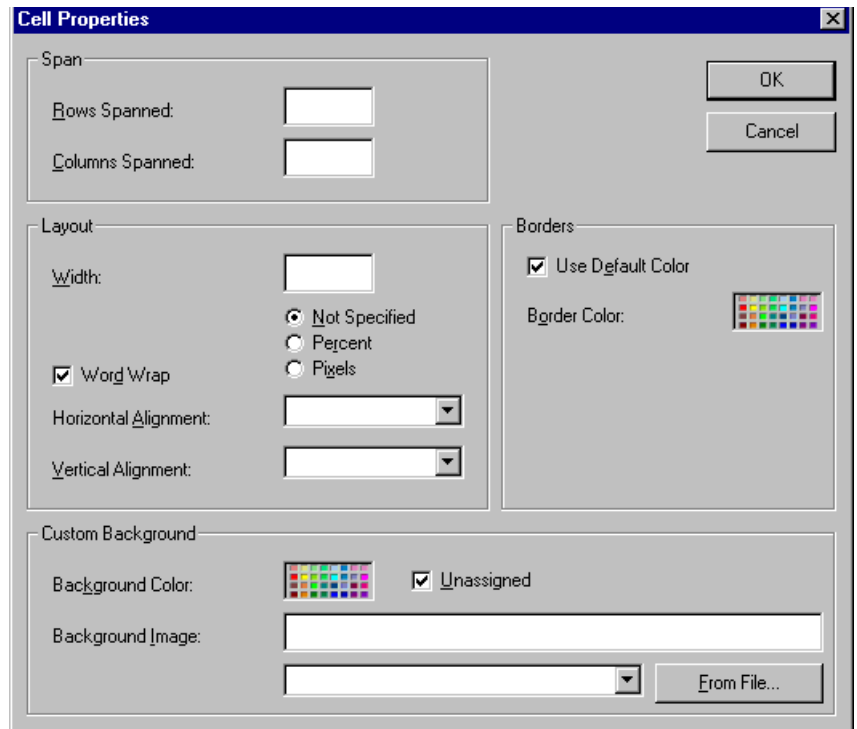
The following table lists the fields on this dialog box and refers you to the section that explains each field.

Field(s)	Lets you specify	For more information, see
Rows Spanned	If the cell spans two or more rows	"Spanning Rows or Columns" on page 350
Columns Spanned	If the cell spans two or more columns	"Spanning Rows or Columns" on page 350
Width	The minimum cell width	"Specifying the Width of a Cell" on page 342

Field(s)	Lets you specify	For more information, see
Word Wrap	Whether text moves down to the next line when it reaches the specified width of a cell	"Word Wrap" on page 358
Horizontal Alignment	The alignment of data across a cell	"Setting Horizontal Alignment" on page 353
Vertical Alignment	The alignment of data up and down within a cell	"Setting Vertical Alignment" on page 354
Background Color	The cell's background color, if you want it to be different from the table's background color	"Specifying a Cell's Background Color" on page 347
Background Image	A background image for the cell	"Specifying a Background Image for a Cell" on page 348
Use Default Color	Apply the table border color to this cell border	
Border Color	Apply a color other than the table border color to this cell border	"Setting a Cell's Border Color" on page 345

The Table Context Sensitive Menu

The following menu appears when you right click the mouse while the cursor is in a table.

Cut
Copy
Paste

Select All

Insert Row
Insert Column

Delete Rows
Delete Columns

Merge Cells
Split Cell

Table Properties...
Cell Properties...

Hyperlink...
Picture...

Clean HTML Code...
Insert HTML
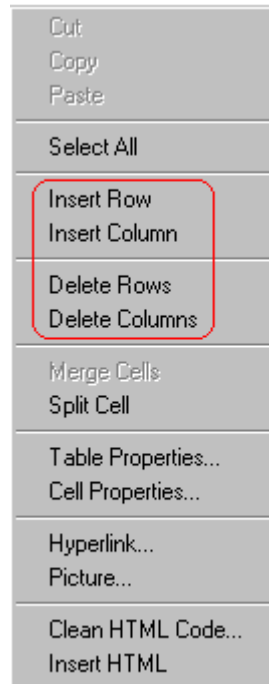
All items on this menu are described in "The Context Sensitive Menu" on page 251 except **Tables**, which is described in "The Insert Table Menu" on page 320.

Manipulating Your Table's Format

This section explains how to manipulate your table's format by specifying

- a number of rows and columns
- a width
- horizontal alignment
- a background color or image
- border color and size

Choosing the Number of Rows and Columns

Use the **Size** section of the Insert Table dialog box to specify the number of rows and columns in the table.
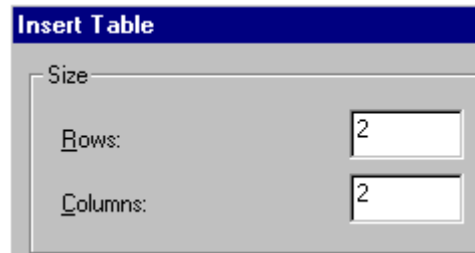
A row is a horizontal series of cells, while a column is a vertical series.

If you know how many rows and columns the table will be, enter those numbers. If you don't know the number of rows and columns you need when you create the table, estimate how many you need. You can add or remove rows and columns later.

Placement of Inserted Row or Column

If you add a row, it appears above the row in which the cursor was resting when you pressed **Insert Row**.

If you add a column, it appears on the left side of the table.

Adding or Removing Rows and Columns

To add or remove rows and columns after you create the table, follow these steps.

1. Place the cursor in the cell from which you want to add or delete.

2. Right click the mouse. A menu appears.

| Cut |
| Copy |
| Paste |
| Select All |
| Insert Row |
| Insert Column |
| Delete Rows |
| Delete Columns |
| Merge Cells |
| Split Cell |
| Table Properties... |
| Cell Properties... |
| Hyperlink... |
| Picture... |
| Clean HTML Code... |
| Insert HTML |
| View as HTML |
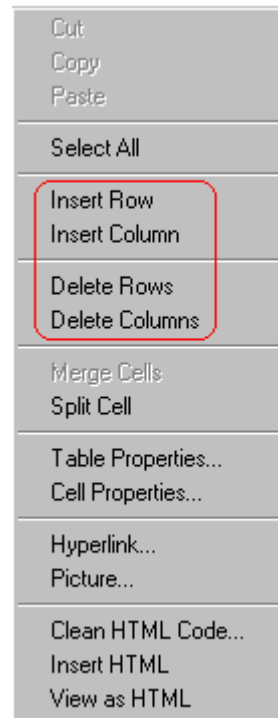
3. Click the appropriate action from the menu. For example to add a row, click **Insert Row**.

NOTE   If you are working with nested tables, and you add or remove a column then undo that action and redo it, you must press the redo button once for each cell in the row or column.

Specifying Table Width

When you create a table, you can set its width by specifying one of the following:

- *percentage* of the window: the table's width varies as a user adjusts the browser size

- *fixed number of pixels*, the table's width stays the same as a user adjusts the browser size

You can also *not* set a width but instead let information you enter into the table's cells determine its width.

NOTE	To set the width of a table column, adjust the width of one of the cells within the column (as described in "Specifying the Width of a Cell" on page 342). Usually, this change affects all other cells in the column.

Specifying Table Width by Percentage

Specify table width by percentage if you want the table to be resized as the user resizes the browser.

NOTE	In order for the table to resize with the browser, the Word Wrap attribute must be turned on in all of a table's cells. For details, see "Word Wrap" on page 358.

For example, if you specify that a table is 100% wide, and your browser displays 14 inches across when it is maximized, the table fills the screen (except for the browser border).
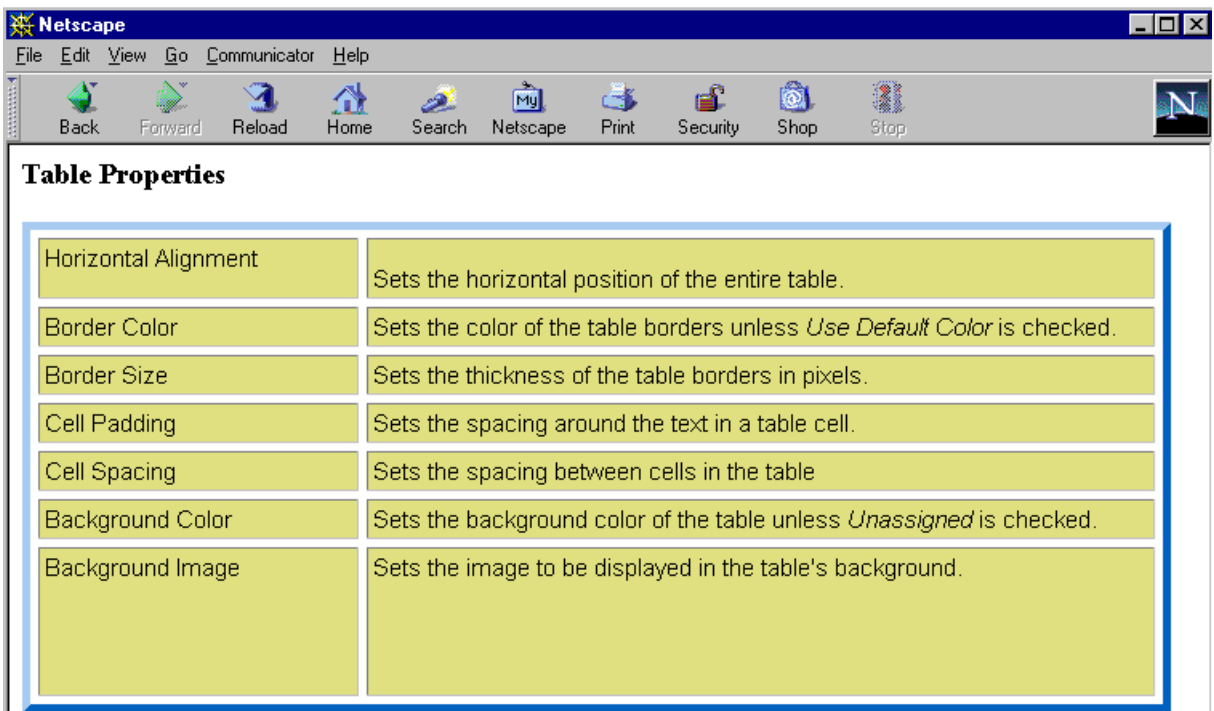
If you resize the browser to half the screen, the table will be about 7" wide. You still see both columns, but some of the data is moved down.
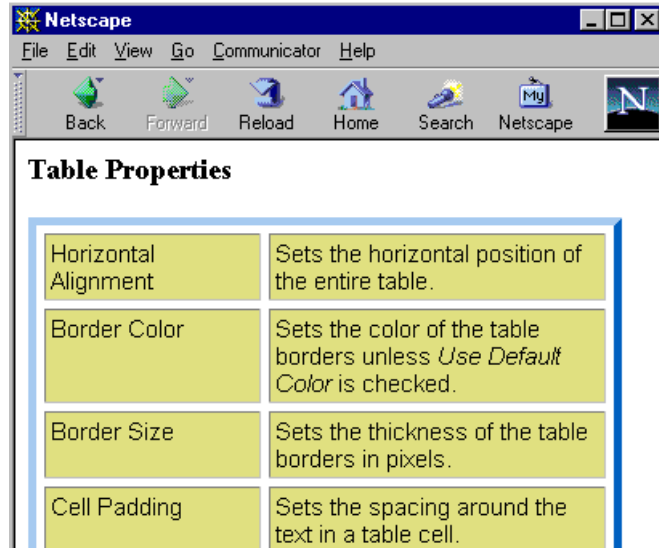
Setting Table Width by Percentage

To specify table width by percentage, choose **Percent** in the layout section of the Insert Table dialog box. Then, specify the percentage at the **Width** field.
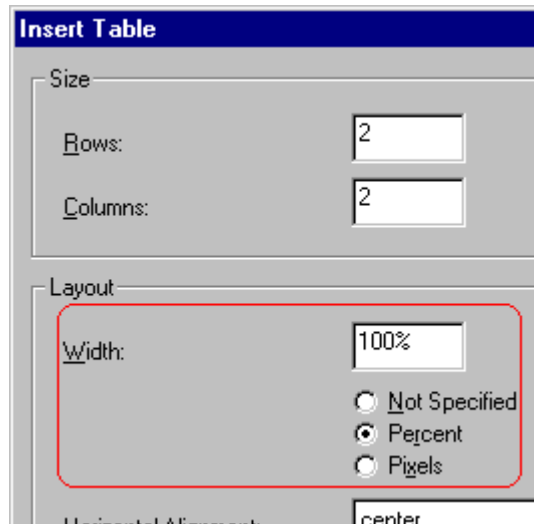
Specifying Table Width by Pixels

Specify table width by pixels if you want the table to remain the same size if a user resizes the browser.

For example, if you specify that a table is 610 pixels wide, and the user's browser is set to low resolution (640 x 480 pixels), the table occupies the full width of the browser when it is maximized.

If the user resizes the browser so that it only occupies the left half of the screen, only the left half of the table appears. A scroll bar appears at the bottom of the browser. The user must move the scroll bar to see the rest of the table.
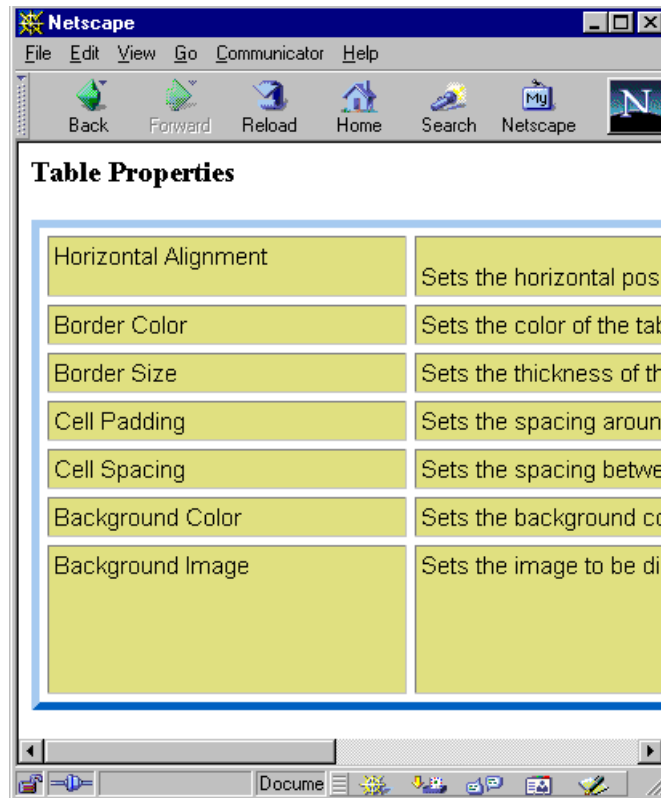
If you set table width by pixels, do not set it to more than 610 pixels. Otherwise, the table will not fully display on a monitor set to low resolution (640 x 480).

Setting Table Width by Pixels

To specify table width by pixels, choose **Pixels** in the layout section of the Insert Table dialog box. Then, specify the number of

pixels at the **Width** field.

Specifying Horizontal Alignment

You can specify your table's horizontal alignment (left, right, or center) within the browser.

Alignment	Example
left	
right	
center	

If you specify right or left justify, you can wrap text around the table. To do this, move the cursor to the right or left of the table and begin typing.

Table Properties

Horizontal Alignment	Sets the horizontal position of the entire table.	In this example, the table is left justified, so this text appears to the right of the table.
Border Color	Sets the color of the table borders unless *Use Default Color* is checked.	
Border Size	Sets the thickness of the table borders in pixels.	

Specify the table alignment at the **Horizontal Alignment** field on the Layout area of the Insert Table dialog box.

Layout
Width: 100%
                     ○ Not Specified
                     ⊙ Percent
                     ○ Pixels
Horizontal Alignment: center
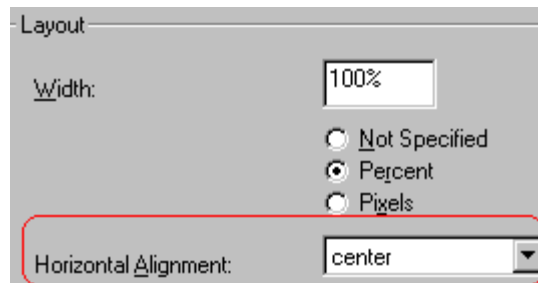
Table Backgrounds

You can specify a background color or image for your table.

Specifying a Table's Background Color

You can assign a background color to a table to make it more pleasing to the eye. Here is an example.

Width	Sets the width of the table on the page in terms of a percentage or by pixel width.
Horizontal Alignment	Sets the horizontal position of the entire table. For example, left, center, right.
Border Color	Sets the color of the table borders unless *Use Default Color* is checked.

NOTE If you apply a dark background color to a table, you may want to apply a light foreground color to the text. Use the font color button ( ) to change the text color.

To assign a background color to your table, click the **Background Color** field on the Insert Table dialog box.

When you click that field, a color dialog box appears. Click the color that you want to apply to the background of the table.

Follow these steps to get help on how to use the color box.

1. Click the question mark in the top right corner.
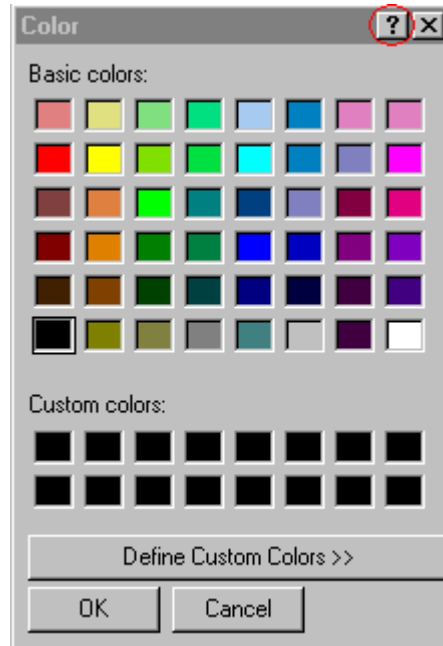
2. A large question mark appears next to your cursor.

3. Drag the question mark to the area of the dialog box that you want to learn about.

4. Click the mouse button. A box appears with instructions for that area.

Deleting a Table's Background Color

To delete a table's background color, click the **Unassigned** box in the **Custom Background** area of the Insert Table dialog box.


Specifying a Background Image for a Table

If you want a background image to appear in all table cells, use the **Background Image** field of the Insert Table dialog box.
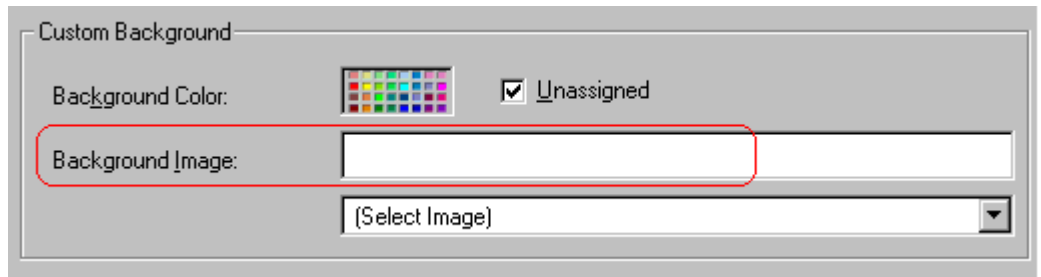
Your Webmaster determines which images are available to you.

To insert a background image

1. Click the down arrow to the right of (**Select Image**). A list of background images appears.

2. Click the image of your choice.

3. Click **OK**.

Note that when you apply a background image to a table

- it applies to the entire table, including the borders.

- if the table is larger than the image, the image repeats until it fills the table.

- if the image is larger than the table, the top left corner of the image aligns with the top left corner of the table. The rest of the image fills as much of the table as possible.

- you can also apply an image to individual cells (see "Specifying a Background Image for a Cell" on page 348).

- make sure that the image does not obscure user's ability to read the table text.

Deleting a Background Image

1. Move the cursor to any cell on the table and right click the mouse.

2. Click **Table Properties** from the menu.

Cut
Copy
Paste
Select All
Insert Row
Insert Column
Delete Rows
Delete Columns
Merge Cells
Split Cell
Table Properties...
Cell Properties...
Hyperlink...
Picture...
Clean HTML Code...
Insert HTML
View as HTML
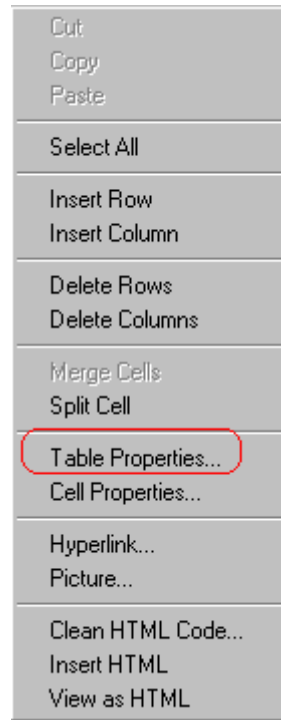
3. Select the value in the **Background Image** field and press <Backspace>.

4. Click **OK**.

Setting Table Borders

You can specify a border color or size for your table.

Assigning Border Color

A table border is the line that separates the table from the rest of your Web page. By default, table borders are gray. You can change the color of table borders.
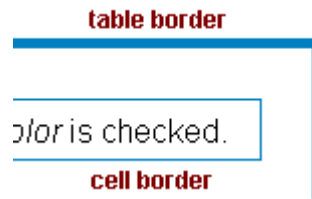
If you want a table's border to "disappear," set it to the same color as the page's background color. This technique is often used to format text on a Web page.

Assigning a Cell Border Color

Each cell also has a border that separates it from the other cells and the table border. By default, a cell's border color matches the table border. However, you can individually change a cell border color (see "Setting a Cell's Border Color" on page 345).

To assign a color to your table's border, click the **Border Color** field on the Insert Table dialog box.
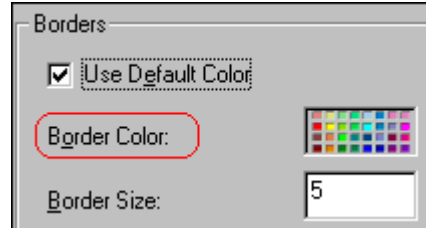
When you click that field, a color selection box appears. Click the color that you want to apply to the table's border. Follow these steps to get help on how to use the color box.

1. Click the question mark in the top right corner.
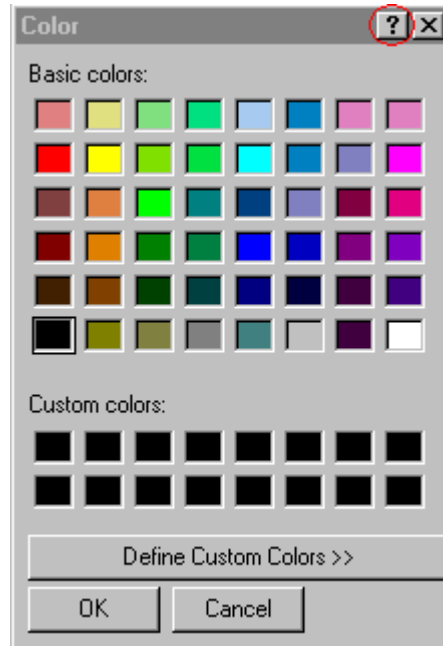
2. A large question mark appears next to your cursor.
3. Drag the question mark to the area of the dialog box that you want to learn about.
4. Click the mouse button. A box appears with instructions for that area.

Assigning Border Size

You can also adjust the size of a table border. Size is measured in pixels.

one pixel
table border

15 pixel
table border
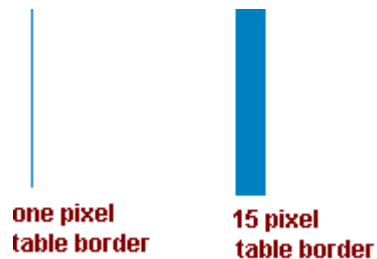
To assign a border size to your table, enter a number of pixels into the **Border Size** field on the Insert Table dialog box.
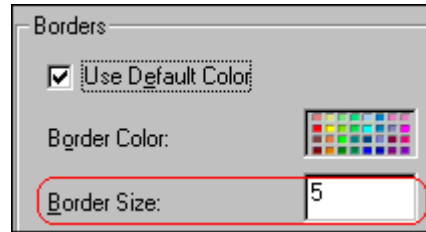
If you set a table's border size to zero (0) but wish to view the table's boundary lines while you are editing it, select the table and click the border button (⊞). Boundary lines will appear while you are editing but disappear when a user views the page.

Working with Table Cells

Along with functions for managing tables (described in "Introduction to Tables" on page 316 and "Manipulating Your Table's Format" on page 327), **eWebEditPro+XML** also lets you perform actions on individual cells within a table.

You can perform the following actions on individual table cells.

- Specify a width.
- Insert or delete cells.
- Specify a border color.
- Specify a background color or image.
- Have a cell span two or more columns or rows.
- Specify horizontal and vertical alignment of the data within the cell.
- Split a cell into two cells.
- Merge two cells into one.
- Turn word wrap on or off.
- Set cell padding and spacing.

NOTE   HTML does not allow you to adjust the width of a cell's border.

You can also select several cells or a row of cells and change them as described above. However, you cannot select and change a column of cells.

Specifying the Width of a Cell

As described in "Specifying Table Width" on page 329, there are several ways to set the width of a table. Within a table, you can also specify the width of an individual cell.

When you set a cell width, there is no guarantee that the cell will occupy that width when displayed in a browser. This is because the cell is part of a column, and changes to other cells in the column can affect the cell whose width you set. Setting cell width only guarantees that the cell will not be *less than* the width you specify.

If you want to ensure that a cell's size does not change, set all cells in a column to that width.

To specify a cell's width, follow these steps.

1. Place the cursor in the cell whose width you want to set.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears.
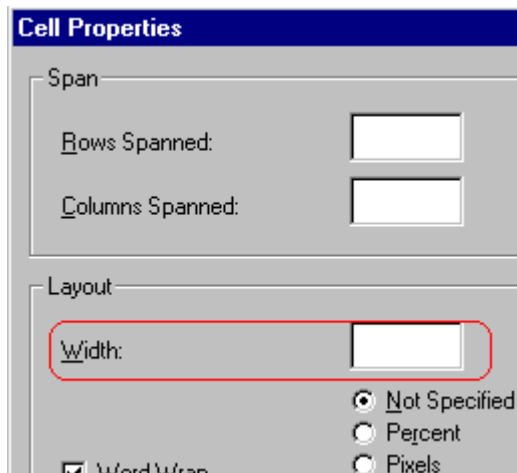
6. In the layout section of the dialog box, enter the cell width at the **Width** field. You can enter the width in pixels or percentage. These choices are explained in "Specifying Table Width" on page 329.
7. Click **OK**.

Inserting a Cell

To insert a cell, follow these steps.

1. Move the cursor to the right of where you want the new cell to appear.
2. Right click the mouse.
3. Click **Insert Cell** from the menu.

The new cell appears to the left of the cell in which the cursor resides when you click **Insert Cell**. The cursor cell and all cells to its right shift right to make room for the new cell.

In this example, the cursor was in cell "b" when the user clicked **Insert Cell**.

Before

a	b *cursor*	c
d	e	f

After

a	*new cell*	b	c
d	e	f	

Deleting a Cell

To delete one or more cells, follow these steps.

1. Move the cursor to the first cell you want to delete.
2. To delete only that cell, proceed to the next step. To delete several contiguous cells, select them. Contiguous cells can cross rows.
3. Right click the mouse.
4. Click **Delete Cells** from the menu.

Any cells to the right of the deleted cells shift left to occupy the vacant space.

In this example, the cursor was in cell "b" when the user clicked on **Delete Cells**.

Before

After

Setting a Cell's Border Color

A cell border is the line that separates it from other cells.

By default, the color of a cell's border matches the color of the table border. However, you can change the color of any cell border individually.

NOTE   When viewed in Netscape Navigator, cell borders are gray, regardless of any change you make on the Cell Properties dialog box.

This example illustrates the effect of different cell border colors within a table.

If you want a cell's border to "disappear," set it to the same color as the table's background color.

To change the color of a cell's border, follow these steps.

1. Move the cursor to the cell and right click the mouse.

2. Click **Table** from the menu.

3. Click **Cell Properties** from the menu.

4. Click the **Border Color** field on the Cell Properties dialog box.
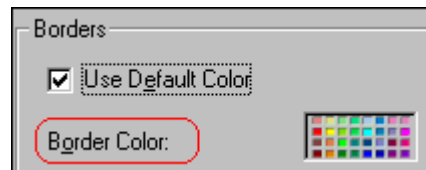
5. When you click that field, a Windows Color selection box appears. Click the color that you want to apply to the cell border.

See Also: "Using the Color Box" on page 349

Specifying a Cell's Background Color

explains how to apply a background color to a table. You can also apply a background color to a cell.

To apply a background color to a cell, follow these steps.

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Click the **Background Color** field on the Cell Properties dialog box.

5. When you click that field, a Windows Color selection box appears.

   See Also:

---

6. Click a color to apply to the background of the cell.

Deleting a Cell's Background Color

To delete a cell's background color, click the **Unassigned** box in the **Custom Background** area of the Cell Properties dialog box.

Specifying a Background Image for a Cell

"Specifying a Background Image for a Table" on page 336 explains how to apply a background image to a table. You can also apply a background image to a cell.

Your Webmaster determines which images are available.

To insert an image into a cell, follow these steps.

1. Move the cursor to the cell and right click the mouse.
2. Click **Table** from the menu.
3. Click **Cell Properties** from the menu.
4. Move the cursor to the **Background Image** field of the Cell Properties dialog box.
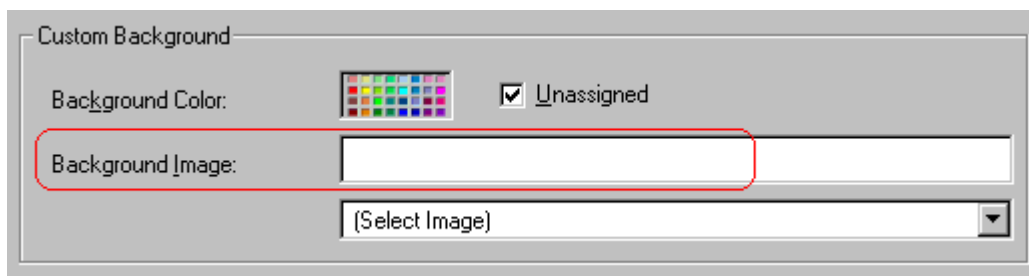
5. Click the down arrow to the right of **(Select Image)**. A list of background images appears.

6. Click the image of your choice.

7. Click **OK**.

Note that when you apply a background image to a cell

- If the cell is larger than the image, the image repeats until it fills the cell.

- If the cell is smaller than the image, the top left corner of the image appears in the top left corner of the cell. The rest of the image fills as much of the cell as possible.

- Make sure the image does not obscure a user's ability to read the cell text (if any exists).

Deleting a Background Image

1. Move the cursor to the cell and right click the mouse.

2. Click **Table** from the menu.

3. Click **Cell Properties** from the menu.

4. Select the value in the **Background Image** field and press <Backspace>.

Using the Color Box

Follow these steps to get help on how to use the color box.

1. Click the question mark in the top right corner.

2. A large question mark appears next to your cursor.

3. Drag the question mark to the area of the dialog box that you want to learn about.

4. Click the mouse button. A box appears with instructions for that area.

Spanning Rows or Columns

You can create a table cell that stretches across more than one row or column. In the following table, notice how the row that contains "Sports Teams" spans three columns.

Sports Teams		
City	**Baseball Team**	**Hockey Team**
Boston	Red Sox	Bruins

Sports Teams		
City	**Baseball Team**	**Hockey Team**
New York	Yankees	Rangers
Chicago	White Sox	Black Hawks

You can also create a column that spans several rows, as illustrated below. Notice that Boston spans three rows.

Colleges	
City	**Name**
Boston	Boston College
	Northeastern University
	Boston University
New York	Columbia University

Spanning More than One Row or Column

To have a table cell span more than one row or column, follow these steps.

1. Place the cursor in the cell that will span rows or columns.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. In the **Rows Spanned** or **Columns Spanned** field, enter the number of rows or columns that you want this cell to span.
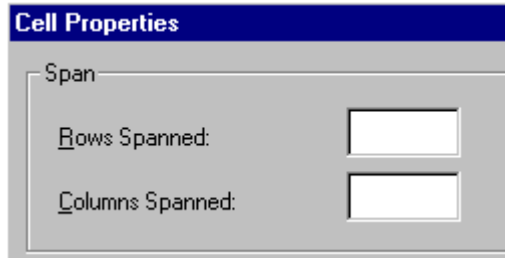
6. Click **OK**.

Effect of Spanning a Cell

When you set a cell to span rows or columns, the editor does not remove the cells that are in the way. Instead, it moves those cells across or down to the next available position.

For example, the following table has two rows and two columns.

If you set cell A to span two rows, note that cell C moves across to make room for cell A. This action pushes cell D to the next column.

Aligning Text Within a Cell

Within a cell, you can specify how your text aligns horizontally and vertically.

Setting Horizontal Alignment

In the Cell Properties dialog box, you can specify the horizontal alignment of a cell. You have set the alignment to left, center, or right, or

- left
- center
- right
- justify - the text is justified down both left and right edges. Many books use this alignment style. (This alignment is not supported by all browsers.)

This example illustrates these choices.
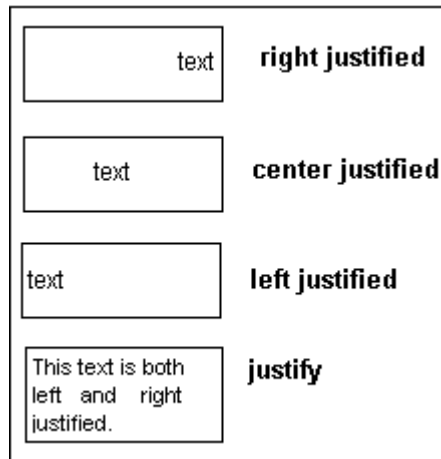
To set horizontal justification of a table cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu
5. The Cell Properties dialog box appears. Click the down arrow to the right of the **Horizontal Alignment** field.

6. Click your choice from the list and click **OK**.

Setting Vertical Alignment

In the Cell Properties dialog box, you can specify the vertical alignment of a cell. You have four choices.

- top
- middle
- bottom
- along the baseline of the first line of text (the term "baseline" is defined in "Aligning the Picture" on page 277)

This example illustrates the choices.
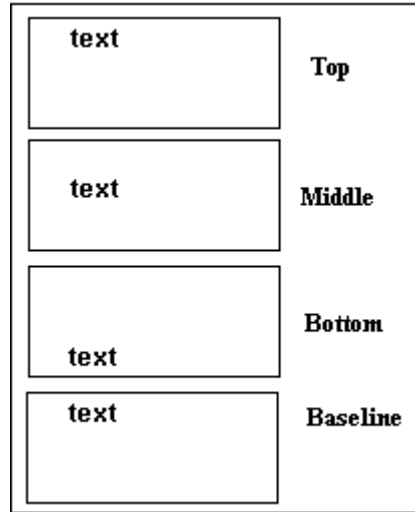
To set vertical justification for a table cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. Click the down arrow to the right of the **Vertical Alignment** field.

6. Click your choice from the list and click **OK**.

Splitting a Cell

You can divide a cell into two. If you split a cell, each cell occupies one half the size of the original cell.

Row before split

Row after split

To split a table cell into two cells, follow these steps.

1. Place the cursor in the cell that you want to split.

2. Right click the mouse.

3. Click **Split Cell** from the menu.
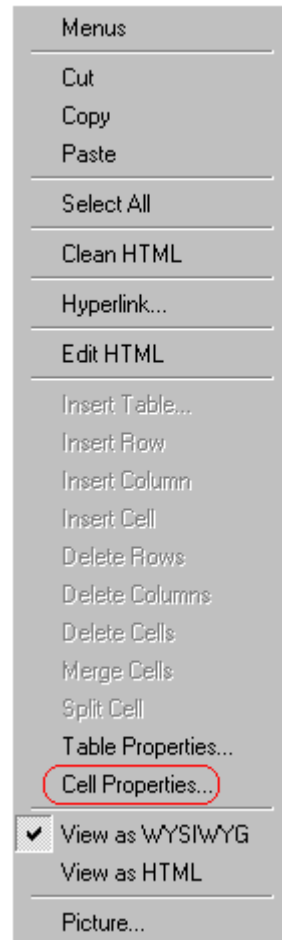
4. Two cells now appear where only one appeared before.

Merging Two Cells

You can merge two cells into one. If you merge two cells, the new cell contains all of the information from both. The new cell's width equals the sum of the two cells that were merged.

Cells Before Merge

Cell After Merge

To merge two or more cells, follow these steps.

1. Select the cells that you want to merge.

2. Click the Insert Table button ().

3. Click **Merge Cells** from the menu.

Word Wrap

Word Wrap is a text formatting feature of tables. It causes text to move down to the next line when the width of the characters on a line equals the column width. For example, if you set column width to 50%, with word wrap turned on, a table looks like this.

If you turn Word Wrap off for the same table, you get this result.

If Word Wrap is turned off, text stays on one line until the user entering table text presses <Enter>. That keystroke causes text to move down to the next line.

By default, all cells have the Word Wrap feature turned on.

To turn Word Wrap on or off for a cell, follow these steps.

1. Place the cursor in the cell that you want to edit.
2. Right click the mouse.
3. Click **Table** from the menu.
4. Click **Cell Properties** from the menu.
5. The Cell Properties dialog box appears. Click or off the **Word Wrap** checkbox and click **OK**.
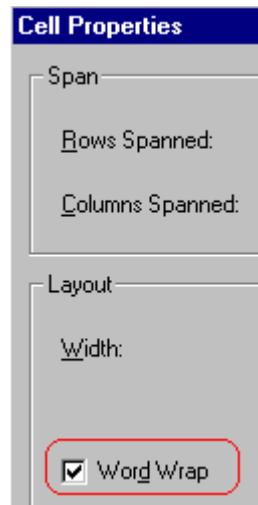
Setting Cell Padding and Spacing

Cell *padding* is the space between a cell's data and its border.
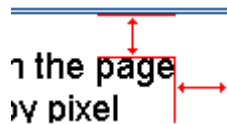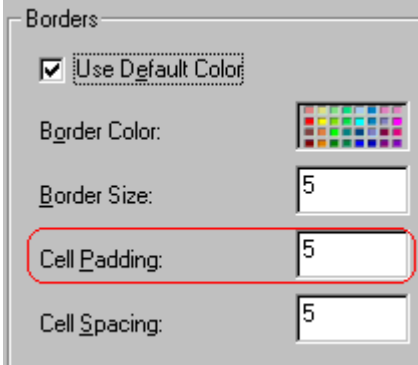
Cell *spacing* is the space between a cell and surrounding cells.
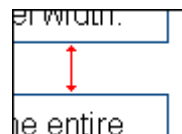
Assigning Cell Padding

To assign cell padding to your table, click the **Cell Padding** field on the Insert Table dialog box. Enter the number of pixels.
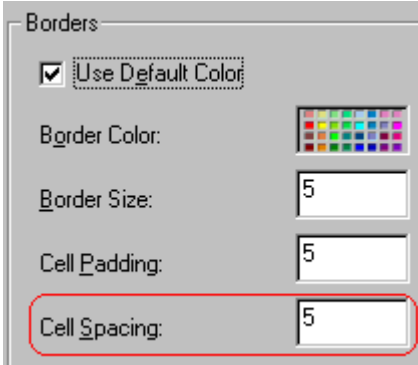
Assigning Cell Spacing

To assign cell spacing to your table, click the **Cell Spacing** field on the Insert Table dialog box. Enter the number of pixels.

Using Bookmarks

Use a bookmark to let a user "jump" from any word, phrase, or image to another place in a file. On your Web page, text appears in a different color to indicate that additional information is available at the bookmark's location.

For example, if your Web page includes meeting minutes, the top of the page could list the meeting dates. You could then assign a hyperlink to each date and a bookmark to each set of minutes.

The user sees that a date is in a different color, so clicks the date to "jump" to the bookmark that marks the location of the meeting minutes.

"Creating a Bookmark" on page 361 describes how to set up a hyperlink to a bookmark within a file. You can also set up hyperlink to

- another Web page. This procedure is described in "Using Hyperlinks" on page 365.
- a bookmark within another Web page. This procedure is described in "Creating a Hyperlink to a Location Within a Web Page" on page 368.

This section explains

- Creating a Bookmark
- Changing the Destination Window

Creating a Bookmark

When creating a bookmark, you must specify a

- *source,* the text or image that the user clicks to move to the bookmark

- *bookmark*, the place to which the cursor jumps when the user clicks the source

To continue with the above example, a meeting date is the source, and the meeting minutes are the bookmark.

To create a bookmark, follow these steps.

1. Select the bookmark text or image.

2. Click the Bookmark button ( ).

3. The Bookmark dialog box appears. Enter the name of the bookmark. The bookmark can include the following non-alphabetic characters: ; / ? : @ & = + $, - _ . ! ~ * ' ( ).
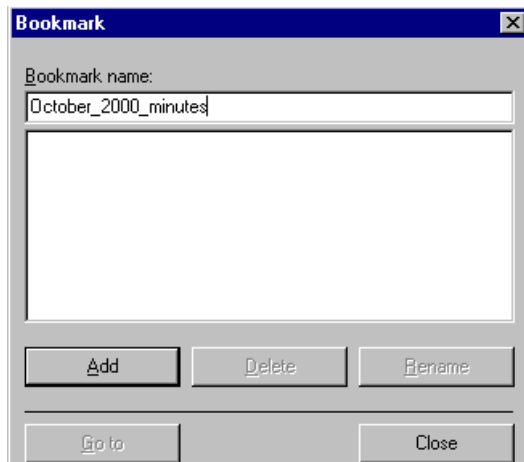
4. Click **Add**.

5. The editor screen returns. (The bookmark does not appear on the page.) Select the source text or image.

6. Click the Hyperlink button ( ).

7. The Hyperlink dialog box appears.

8. Click the down arrow to the right of the **Quick Link** field and click the bookmark you created in Step 3.
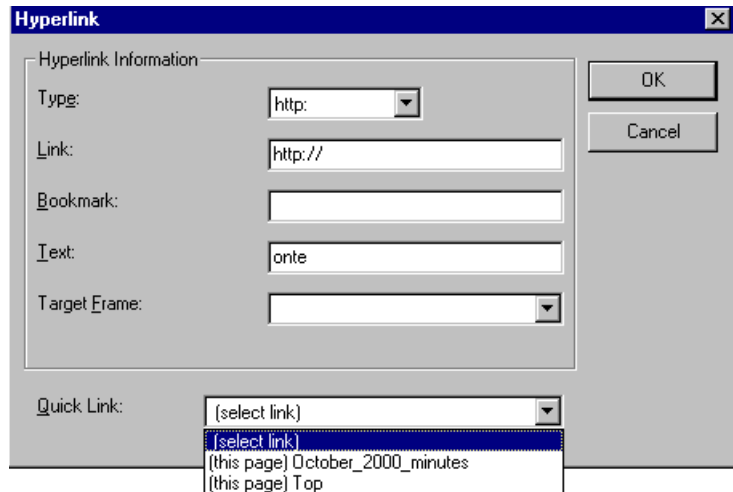
9. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 363.

   If you leave the **Target Frame** field blank, the new window replaces the current window.

10. Click **OK**.

Changing the Destination Window

While defining hypertext, you can use the **Target Frame** field on the Hyperlink dialog box to change the window in which the destination page appears.
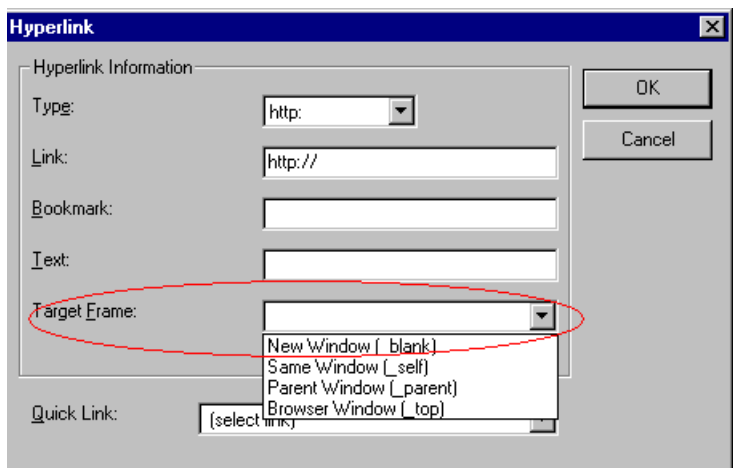
The possible values that you can enter into the **Target Frame** field are explained below.

If you want the destination page to appear	Click this in the Target Frame field
In a new browser window, on top of the current browser.	**New Window(_blank)**
In the same position within the browser window. The new window replaces the current one.	**Same Window(_self)** Note: this is the default.
If your page contains frames, in the frame that contains the frame with the hyperlink.	**Parent Window(_parent)**
If your page contains frames, in the full display area, replacing the frames.	**Browser Window(_top)**
If your page contains frames, in the frame with the specified name.	Enter the name of the frame.

Using Hyperlinks

Use hyperlinks to let a user "jump" from any word, phrase or image to another Web page. The page can be within your network (that is, on an intranet) or anywhere on the internet.

For example, if your Web page includes a jump to the Ektron Web site, you would enter the text to indicate the jump (for example **Ektron Web Site**), then create a hyperlink to `www.ektron.com`. When users see **Ektron Web Site** in a different color, they can click the text to "jump" to the site.

Although most jumps go to the top of another Web page, you can also jump to a bookmark within a Web page.

This section explains

- Creating a Hyperlink
- Testing a Hyperlink
- Creating a Hyperlink to a Location within a Web Page
- Editing a Hyperlink
- Removing a Hyperlink
- Preventing a URL from Becoming a Hyperlink

Creating a Hyperlink

When creating a hyperlink, you must specify a

- *source,* the text or image the user clicks to move to the destination
- *destination*, the Web page to which the display moves when the user clicks the source

To continue with the above example, Ektron Web Site is the source, and the Web page available at `www.ektron.com` is the destination.

To create a hyperlink, click the Hyperlink button (🌐). When you do, the Hyperlink dialog box appears. From there, you can select from a list of Web pages (also known as *Quick Links*). Or, if the page you are jumping to is not on the list, enter the url address of the destination Web page. Each choice is described below.

Using a Quick Link

Your Web master can add to the Hyperlink dialog box any number of Quick Links, that is, Web addresses that you can link to simply by selecting an item from a drop down menu.

Quick links are "quick" because you do not need to enter or know the url of the destination Web page -- your Web master has already stored that information for you.

To apply a Quick Link, follow these steps.

1. Select the source text or image.

2. Click the Hyperlink button (🌐). The Hyperlink dialog box appears.
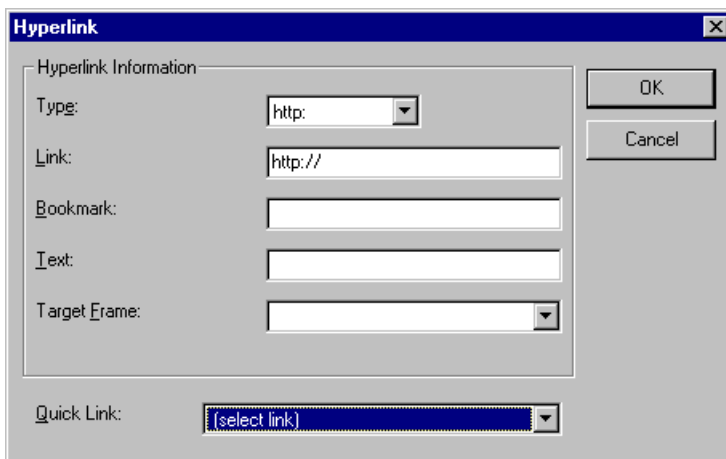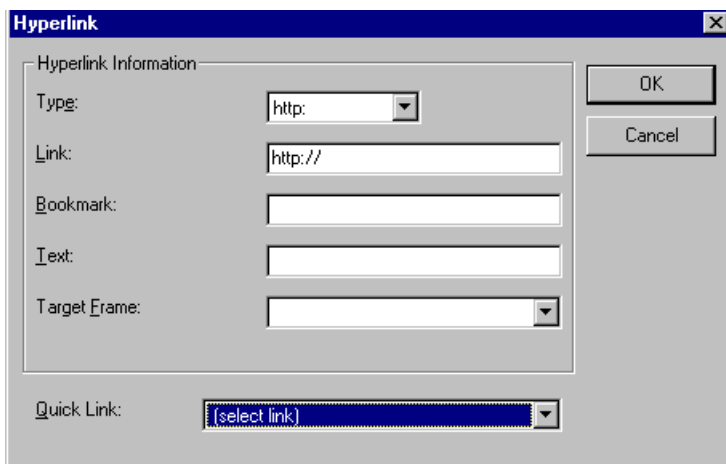
3. Click the down arrow to the right of the **Quick Links** field. A list of Web pages that your Web master has pre-loaded appears.

4. Click an item from the list to select it.

5. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 363.

   If you leave the **Target Frame** field blank, the new window replaces the current window

6. Click **OK**.

Entering a Hyperlink Manually

To create a hyperlink, follow these steps.

1. Select the source text or image.

2. Click the New Hyperlink button (🖼). The Hyperlink dialog box appears.

3. Click in the **Link** field after `http://`. Then, enter the address of the destination Web page. For example, to enter a hyperlink to the ektron Web site, enter `www.ektron.com`.

4. If desired, you can use the **Target Frame** field to change the window in which the destination text appears. For details, see "Changing the Destination Window" on page 363.

   If you leave the **Target Frame** field blank, the new window replaces the current window

5. Click **OK**.

Testing a Hyperlink

Within the **eWebEditPro+XML** editor, you can test a hyperlink. To do this, select the hyperlink then double click it. That action launches the Web page assigned to the hyperlink.

Creating a Hyperlink to a Location Within a Web Page

Sometimes, the destination Web page contains bookmarks, and you want to jump from your page to a bookmark on another page. (Bookmarks are described in "Using Bookmarks" on page 361.)

To create a hyperlink that jumps to another page's bookmark, follow these steps.

1. Go to the destination Web page.

2. Click the bookmark that you want to jump to. For example, on the illustration below, the text **Benefits to Partners** jumps to a bookmark further down on the page.

PARTNER PROGRAM OVERVIEW

Welcome!

- Executive Summary
- Ektron Partner Programs   **Ektron Technology Partners**
- Benefits to Partners
- Ektron Products

- Partners in Learning Program

3. When you click the bookmark, its full address appears in your browser's address bar. This bookmark's address looks like this.

   `http://www.ektron.com/single.cfm?doc_id=35#Benefits2`

4. Click the address bar. The address is selected. Press <Ctrl>+<C> to copy the address into the Windows clipboard.

5. Go to **eWebEditPro+XML**.

6. Select the text or image from which you want to jump to the bookmark.

7. Click the Hyperlink button (). The hyperlink dialog box appears.

8. Move the cursor to the **Link** field.

9. Press <Ctrl>+<V> to paste the address you copied in Step 4 into the **Link** field.

10. Click **OK**.

Editing a Hyperlink

If you need to change a hyperlink's destination Web page or target frame, follow these steps.

1. Click the Hyperlink button (). The hyperlink dialog box appears.
2. Edit the **Link** or **Target Frame** field as needed.
3. Press **OK**.

Removing a Hyperlink

If you want to remove the hyperlink from text or an image, select the text or image and press the Remove Hyperlink button ().

Preventing a URL from Becoming a Hyperlink

If you enter a URL or an email address into **eWebEditPro+XML**, it automatically becomes a hyperlink. To prevent this, enter an extra space in the URL or address.

For example, instead of entering **sales@ektron.com**, enter **sales**<blank>**@ektron.com**.

Working with HTML

eWebEditPro+XML creates pages for display on the World Wide Web or an intranet. These pages use HTML (hypertext markup language) to format text and images for display in a browser. You do not need to know HTML to use **eWebEditPro+XML**.

However, if you know HTML, you can view, insert or edit your Web page's HTML code.

Viewing and Editing HTML

When you choose to view your page as HTML, the editor cleans the content using a method determined by your Webmaster. (For more information, see "Cleaning HTML" in the **eWebEditPro+XML** Developer's Reference Guide.)

To view your page's HTML, follow these steps.

1. Click the View as HTML button ( ), or right click the mouse and click **View as HTML** from the menu.
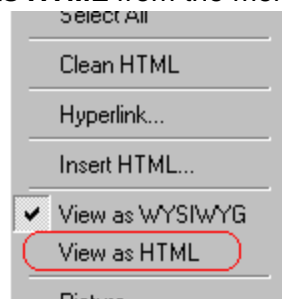
2. The HTML code appears. While viewing the code, you can edit it using editor functions such as Cut, Copy, Paste and Replace. To select all content, press <Ctrl>+<A>.

   You can also set default values for the style, size and color in which the HTML appears. To do this, right click the mouse and click **Preferences**. When you do, a dialog box

appears in which you can enter formatting information about the HTML code.
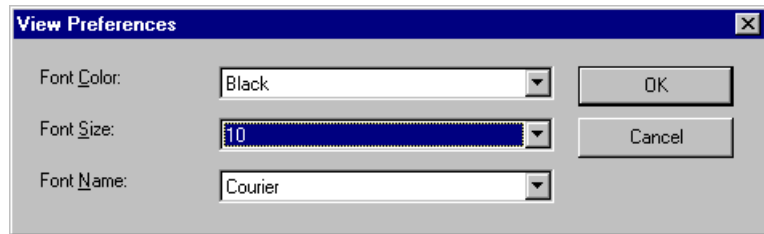
These settings will be used whenever you view as HTML.

The settings are ignored when you view the page in WYSIWYG mode and when the user views the page.

3. To return to normal view, click the **View as WYSIWYG** button (🗏) or right click the mouse and click **View WYSIWYG**.

Editing a Section of a Page

If you want to edit only a section of the HTML on your Web page, follow these steps.

1. Select the portion of your Web page that you want to edit.
2. Right click the mouse.
3. Click **Edit Source** from the menu. The HTML code appears.
4. Edit the HTML code as desired.
5. Click **OK**.

Inserting Source

If you want to insert HTML source code into your Web page, follow these steps.

1. Place the cursor at the spot on the page where you want to insert the HTML.
2. Right click the mouse.
3. Click **Insert Source** from the menu.
4. The Insert Source dialog box appears. Paste or type your HTML code.
5. Click **OK**.

Cleaning Source Code

eWebEditPro+XML lets you "clean" the HTML source code for your Web page. You would typically use this feature after entering HTML text or pasting HTML code into **eWebEditPro+XML** from another application.

The Clean Source option removes unnecessary HTML tags, ensures that all tags begin and end properly, and maximizes the page for efficiency. As a result, the page should be error-free and load more quickly in a browser. Also, the appearance of clean HTML is more consistent when viewed in different browsers.

To clean your HTML, follow these steps.

1. Right click the mouse.
2. Click **Clean Source** from the menu.
3. **eWebEditPro+XML** cleans your Web page's HTML content.

Inserting Content from MS Office 2000

If you paste text into **eWebEditPro+XML** from a Microsoft Office 2000 application, such as Microsoft Word, the following window appears.
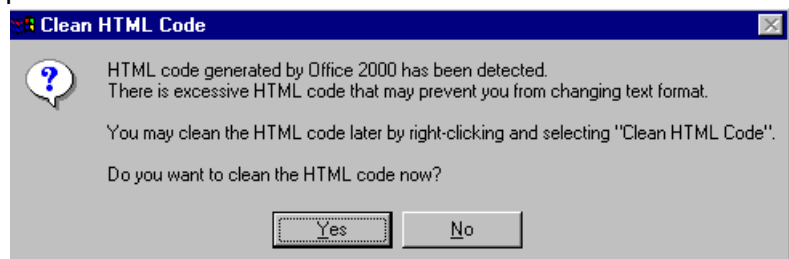
For best results, click **Yes**.

Section 508 Compliance

This section explains how **eWebEditPro+XML** complies with Section 508 of the Rehabilitation Act (a law enacted by the United States government that requires Federal agencies to make their electronic and information technology accessible to people with disabilities).

Specifically, this section explains how to

- move the cursor into the **eWebEditPro+XML** editor
- use **eWebEditPro+XML** without a mouse
- work with Section 508 tables

Moving the Cursor into eWebEditPro+XML

Using Internet Explorer

If the **eWebEditPro+XML** editor is one of several fields on a page, and your browser is Internet Explorer, move to **eWebEditPro+XML** by pressing <Tab> until the cursor lands in the editor.

To move from the editor to the next field, press <Ctrl>+<Tab>.

Using Netscape

If the **eWebEditPro+XML** editor is one of several fields on a page, and your browser is Netscape, your Webmaster needs to create custom toolbar buttons that let you move into and out of the editor. (This procedure is described in the **eWebEditPro+XML** Developer's Reference Guide.)

Using eWebEditPro+XML without a Mouse

As explained in "Customizing Your Toolbar" on page 243, the **eWebEditPro+XML** toolbar consists of one or more toolbar menus. Menus have buttons that you click with the mouse to perform actions, such as copying text.

This section explains how to perform those actions without using the mouse.

1. With the cursor in the **eWebEditPro+XML** editor, press the application key ( ).

2. A menu appears.

Menus
Cut
Copy
Paste
Paste Text
Select All
Clean HTML
Hyperlink...
Insert HTML...
✔ View as WYSIWYG
View as HTML
Picture...
Insert Custom Tag...
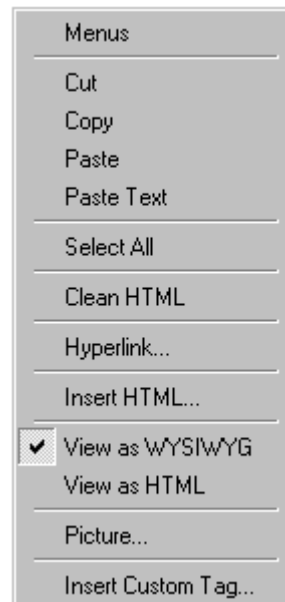
3. Press the down arrow key (↓)to select **Menus**. **Menus** becomes highlighted.
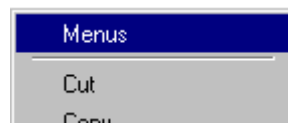
Menus
Cut
Copy

4. Press <Enter>. A new menu lists all toolbar menus available to you.

If your Webmaster has given you access to all standard toolbar menus, the menu looks like this.

```
Edit
View As
Paragraph Format
Format
Special Characters
Form Elements
Table
Position Objects
Text Direction
─────────────────
Customize...
```
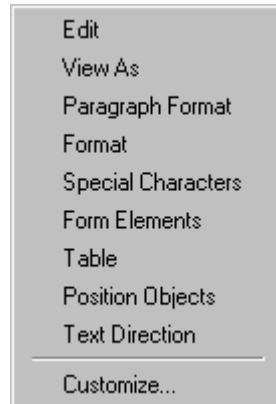
5. Press the down arrow key (↓)to select the toolbar menu that has a button that you want to use.

6. A new menu appears, listing all options on the selected menu. The following menu displays what might appear if you select the Edit Menu. (Your Webmaster determines which menu options are available to you).

```
Cut
Copy
Paste
Paste Text
Replace
Find Next
Print

Undo
Redo

Check Spelling
Check Spelling As You Type

Bookmark
Hyperlink
Remove Link

HR
Picture
Table

Edit in Word
```
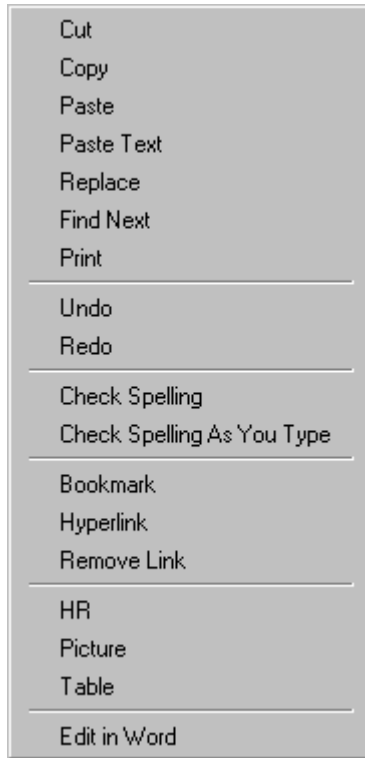
7. Press the down arrow key (↓) until the desired option is highlighted. Then, click the option to perform the action.

Section 508 Tables

You cannot create Section 508 compliant tables using the standard Table Properties dialog box. Specifically, the dialog does not let you define a caption, summary, and table heading. To define these elements (needed for Section 508 compliant data tables), use the Section 508 Table option of the Table menu (illustrated below).

WARNING! The Section 508 Table Properties dialog only works with Internet Explorer version 5.0 or higher. It does not work with Netscape.
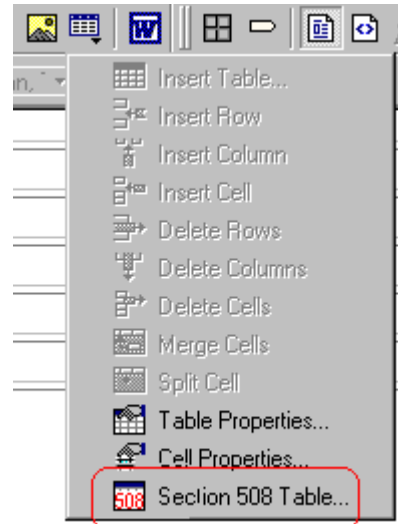
WARNING! Even if you change no values on the screen, you *must* open this dialog box whenever you modify a table (for example, add a new row). The table's properties, required for Section 508, are generated when you click OK to close the dialog box.

To create a 508 compliant table, follow these steps.

1. Create a table, as explained in "Introduction to Tables" on page 316.

2. Select the table by moving the cursor to a table border until you see a four headed arrow (illustrated below). When a table is selected, small squares surround it.

Employee Id	Department
1548	Marketing
1549	Human Resources
1550	Sales
1551	Administration

3. Click the Tables button (▦) then select **Section 508 Table**.

4. The Section 508 Table Properties dialog box appears (illustrated below).

Respond to the fields in the dialog. They are described below.

Field	Description
Heading Rows	If you want your table to have a horizontal header, enter the number of rows that it should occupy. Beginning with the top, all cells in the specified number of rows are designated as table headers.
Heading Columns	If you want your table to have a header, enter the number of columns that it should occupy. Beginning with the left column, all cells in the specified number of columns are designated as table headers.
Summary	If desired, enter the table summary. Non-visual browsers can use the summary to explain the contents of the table.
Caption	If desired, enter the table caption. The caption appears centered below the table when viewed.

Field	Description
Horizontal Caption Alignment	If desired, enter the caption's horizontal alignment: ● center ● left ● right
Vertical Caption Alignment	If desired, enter the caption's vertical alignment: ● bottom ● top

After you complete the Table Properties dialog, click **OK** to make the table comply with Section 508.

Editing XML Web Pages

Your Web developers have a lot of flexibility in how they implement **eWebEditPro+XML**. As a result, this documentation cannot describe exactly how your system works.

This section explains the screens, menus and dialog boxes that you will likely encounter when working with **eWebEditPro+XML**.

This section describes the following topics.

- A Typical XML Screen
- Custom Tag Menu Options
- Inserting XML Tags
- The Custom Tag Attributes Dialog
- The Insert Custom Tag Dialog Box

A Typical XML Screen

The following screen, a sample that Ektron provides with **eWebEditPro+XML**, has features that may appear within your browser. The screen consists of XML *tags* and fields into which you can insert *tag values.* (Tags are elements that collect XML content, such as **Author** and **Book Title** in the screen below.)
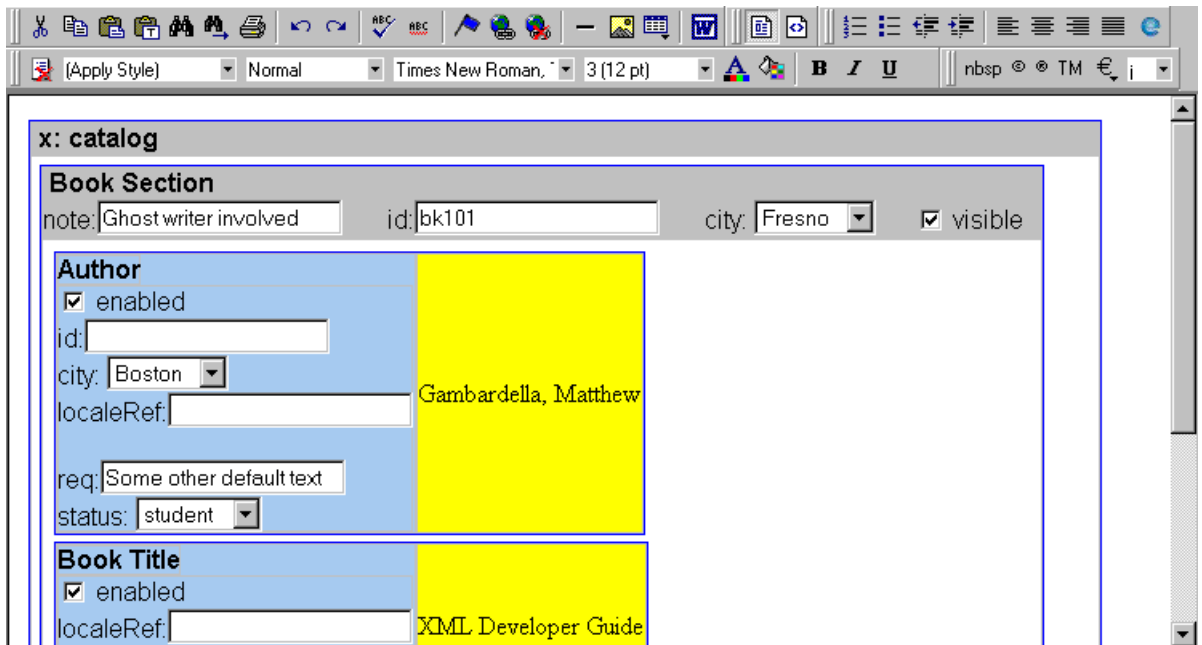
Types of Tags

Here is some information about the types of tags that can appear on an **eWebEditPro+XML** screen.

- Some tags accept text, such as note: Ghost writer involved .

- Some tags accept a check mark if the condition is true, and no check mark if it is false. For example, ☑ visible.

- Some tags provide a list of choices. To view the list, click the down arrow to the right of the tag (circled in the illustration below). Scroll through the list until you find the correct choice. Then, click it to enter it. For example:

These tags can provide a most likely "default" value, which is the value of the tag when you first see it.

Custom Tag Menu Options

If you move the cursor to an area of the screen where you can insert XML tags and right click the mouse, three new menu options appear:

- Insert Custom Tag
- *(tag name)* Tag Attributes
- *(tag name)* Tag Properties

For example:
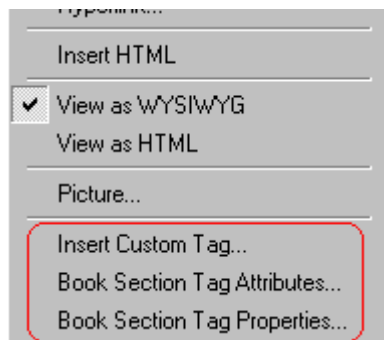
The Insert Custom Tag option is explained in "Inserting XML Tags" on page 383.

The *(tag name)* Tag Attributes option is explained in "The Custom Tag Attributes Dialog" on page 385.

The *(tag name)* Tag Properties option is intended for developers, so is not explained in this documentation. This option is documented in the Developer's Reference Guide section "Custom XML Dialog Boxes."

Inserting XML Tags

Some XML screens let you insert additional XML tags at certain locations. If you move the cursor to a location where you can insert

tags and right click the mouse, the **Insert Custom Tag** option appears.
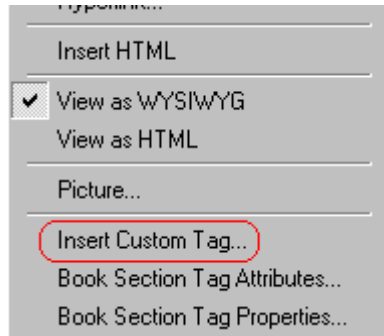
When you click **Insert Custom Tag**, another menu appears. The top of the menu may list tags that can be inserted at your cursor's location, according to the XML schema or DTD being used. (A schema or DTD describes the hierarchy of tags in XML.) For example:
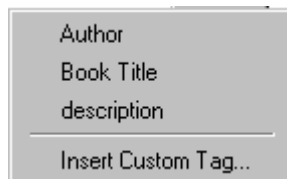
In the above illustration, the first three menu options (**Author**, **Book Title**, and **Description**) are tags that can be inserted. When you click a tag to insert it, the Custom Tag Attributes dialog box appears. For more information, see "The Custom Tag Attributes Dialog" on page 385.

After you finish working with the Custom Tag Attributes dialog box, the selected tag is inserted at the location of the cursor. Additional tags and/or attributes may be inserted at the same time if your developer has set up the selected tag to do so.

You may also be able to insert a tag whether or not it can be inserted at the cursor location. If you click **Insert Custom Tag** from the above menu and the following dialog box appears, you can insert any tag on the list.
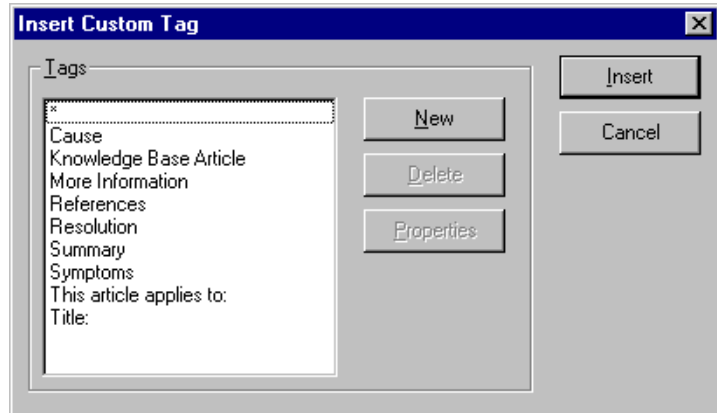
The Custom Tag Attributes Dialog

XML tags can have *attribute*s, which are used to further define an XML tag. For example (in which "importance" is the attribute):

```
<element importance="high">Text</element>
```

The Custom Tag Attributes dialog box appears when you

- insert a new tag, or
- place the cursor in an XML tag that does not show attributes, right click the mouse, and choose **Custom Tag Attributes** from the menu.

The dialog box allows you to

- view attributes that are assigned and that can be inserted
- remove assigned attributes
- add available attributes
- add new attributes
- enter or modify an attribute's value
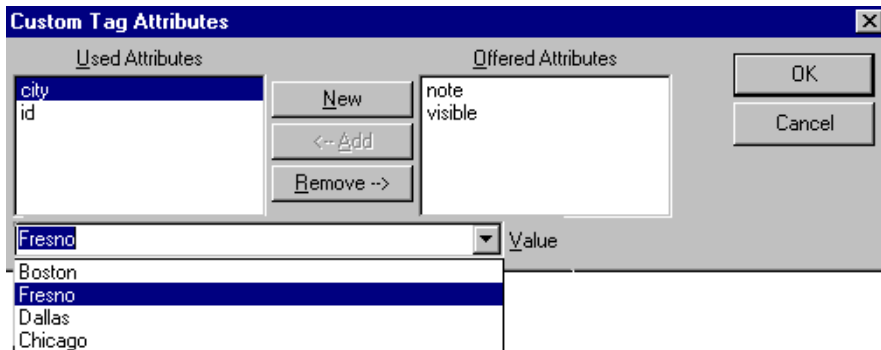
Removing an Attribute

To remove an assigned attribute, follow these steps.

1. Click the attribute within the **Used Attributes** column.
2. Click **Remove -->**.
3. Press **OK** to close the dialog box and remove the selected attribute.

Inserting an Available Attribute

To insert an attribute that can be inserted at the cursor location, follow these steps.

1. Click the attribute from the **Offered Attributes** column.
2. Click **<--Add**.
3. Press **OK** to close the dialog box and insert the attribute.

Inserting a New Attribute

To insert an attribute that does not appear in the Custom Tag Attributes dialog box, follow these steps.

1. Click **New**.
2. A new line is added to the top of the **Used Attributes** column to make room for the new attribute.
3. Enter the attribute into the new line (circled in the illustration below).
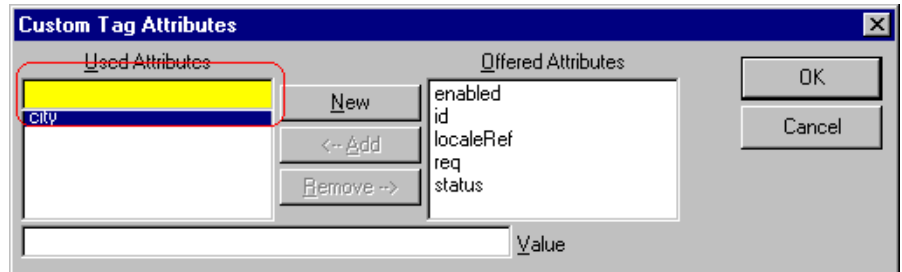
4. Press **OK** to close the dialog box and insert the attribute.

Entering or Modifying an Attribute Value

To modify or enter an attribute value, the attribute must be in the **Used Attributes** column. To change or enter the value, follow these steps.

1. Click the attribute.
2. Change or enter the text in the **Value** field (circled in the illustration below).
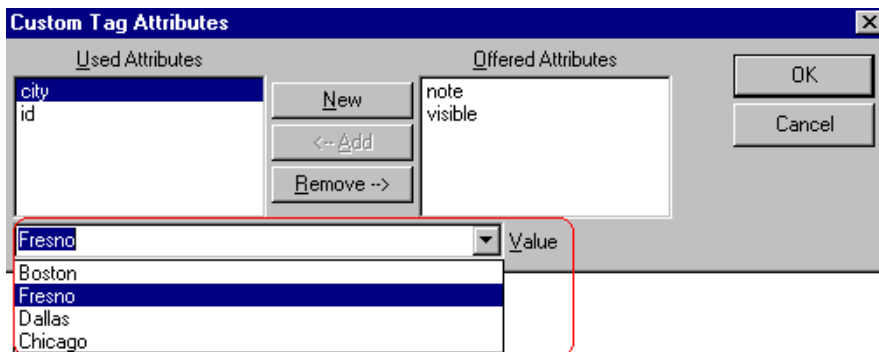
3. Press **OK** to close the dialog box and change the attribute value.

The Insert Custom Tag Dialog Box

Use this dialog box to insert a custom tag that may or may not be available at the cursor location, according to the schema or DTD.
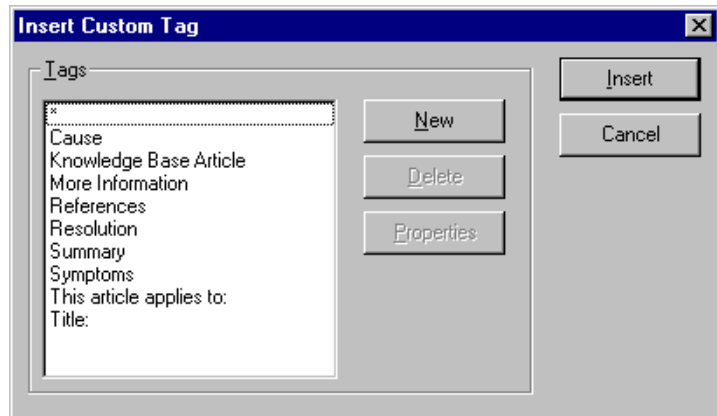
Inserting an Available Tag

To insert any tag from the current schema or DTD, follow these steps.

1. Click the tag from the **Tags** column.

2. Click **Insert**.

3. The Custom Tag Attributes dialog appears. To learn how to use that, see "The Custom Tag Attributes Dialog" on page 385.

Inserting a New Tag

To insert a new tag, follow these steps.

1. Click **New**.

2. A new line is added to the top of the **Tags** column to make room for the new attribute.
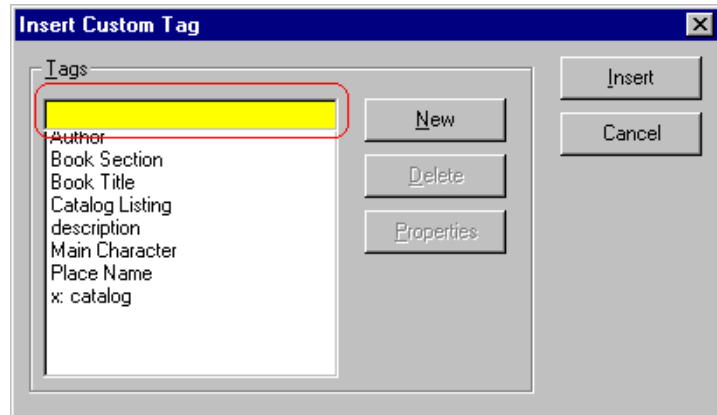
3. Enter the attribute into the new line (circled in the illustration above).

4. Press **Insert** to close the dialog box and insert the tag.

NOTE	If you insert some new tags to this screen and then decide you do not want to insert one of them, click the unwanted tag and press the **Delete** button to remove it from the list.

Inserting Comments within Content

While editing **Ektron CMS400.NET** content, you can insert comments to the content. Comments might be an author's note to himself or other authors about the content block. For example, you could insert a comment explaining why you are using a certain style class.

Comments are only visible during editing -- they do not appear when the content is published on your Web site.
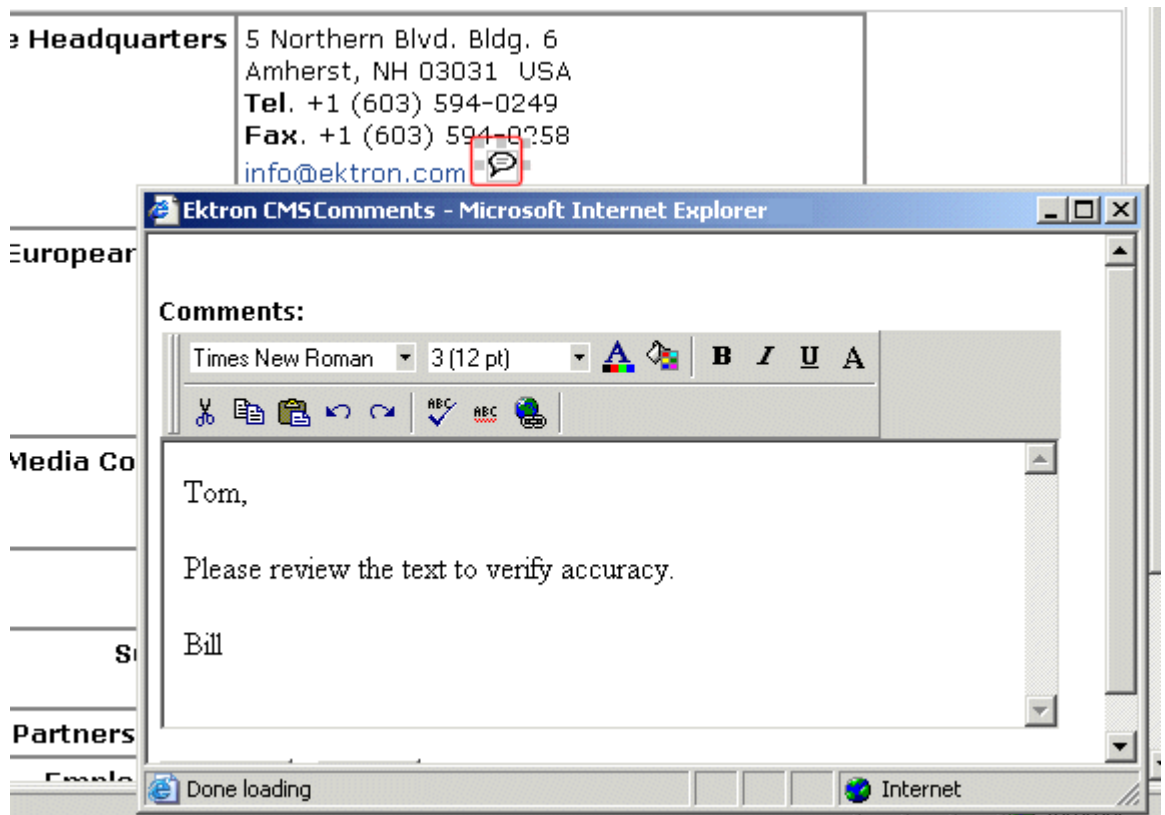
Other users can add comments to your comments. This feature is know as "Content Collaboration."

Similar to other word processing programs, comments can be added, updated, and tracked to audit changes being made.

This section explains the content collaboration feature.

WARNING! Do not confuse these comments, which are inserted within the content, with history comments, which are inserted outside the content and used to indicate what changed during an editing session.

Adding Comments to Content

To add a comment to a content block, follow these steps.

1. Create a new content block or edit an existing one. *See Also:* "Adding a Content Block" on page 36

2. In the editor, place the cursor where you want to insert the comment.

3. On the *editor* toolbar, click the **Insert Comment** button ( ).

4. The Ektron CMS Comment window opens.

5. Insert a comment. Use the toolbar to format the text if desired.

6. Click the **Insert** button.

7. The comment is saved.

8. Click the **Close** button.

9. The comment window closes, and a comment icon is placed where the comment was added to the content.

Each comment appears in the table at the top of the window. From this window, you can add another comment and update an existing one. See the next section for more details.

Viewing a Comment

After a comment is inserted into a content block, it can be viewed by any user who can edit the content block. To view a comment, follow these steps.

1. Edit the content block that contains the comment.

2. Within the content, double-click the comment icon.

3. The Comments window opens.

Adding Another Comment

To comment on an existing comment, follow these steps.

1. Access the View Comment window for the comment, as described in "Viewing a Comment" on page 392.

2. Insert the comment.

3. Click the **Insert** button**.**

4. The comment is saved and added to the top row of the comment table.

5. Click the **Close** button.

Updating a Comment

You can change a comment if needed. To update a comment, follow these steps.

1. Access the View Comments window for the comment that needs to be updated.

2. Click the **Date/Time** link of the comment you want to edit.

3. The comment editor opens with the selected comment in it.

4. Update the comment.

5. Click the **Update** button to save the changes.

Appendix A: Content Statuses

The table below describes all possible content statuses. The rest of this appendix explains each status in more detail.

Letter	Border Color	Meaning	Content state	More Information
A	green	**Approved**	Through the workflow and published on the Web site.	"Active Content" on page 395
O	red	**Checked Out**	Currently being edited. Has not been checked in.	"Checked Out Content" on page 398
I	green	**Checked In**	Checked in for other users to edit.	"Checked-In Content" on page 396
S	yellow	**Submitted for Approval**	Saved and submitted into the approval chain. *See Also:* "Approving/ Declining Content Blocks" on page 64	"Submitted Content" on page 398
M	yellow	**Marked for Deletion**	Requested for deletion.	"Marked for Deletion Content" on page 400
P	grey	**Pending Go Live Date**	Approved but the Go Live date hasn't occurred yet.	"Pending Start Date Content" on page 400
T		**Awaiting Completion of Associated Tasks**	Task(s) assigned to content are not complete	

Letter	Border Color	Meaning	Content state	More Information
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.	

Active Content

If a content block has a green border, it is live on the Web site.
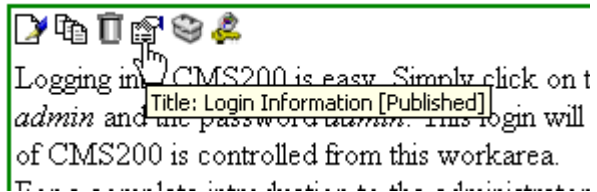
When content is active, you can perform the following actions on it, depending on your permissions.

The content block's status remains active until it is checked out and changes are made to it.

Button	Name	Description	For more information, see
	Edit	Check-out the content block to change it.	"Editing a Content Block" on page 39
	Edit Summary	Edit the brief summary used to describe the content.	"Adding a Content Block Summary" on page 56
	Edit Metadata	Change the content block's metadata.	"Adding or Editing Metadata" on page 60

Button	Name	Description	For more information, see
🗑	Delete	Submit a request to delete the content. If you are the last or only approver, the content is immediately deleted. *See Also:* "Example of an Approval Chain" on page 67	"Deleting a Content Block" on page 41
←	Back	Go to previous window.	

Checked-In Content

If a content block has a green border, it could mean that the content block is checked in. A checked-in content block is one to which changes were made, after which it was checked in instead of being submitted or published. When a content block is checked in, it is accessible to all users who have permissions to edit it. They can check it out and change it.

Keep in mind that the content seen on the template is not the same as the content in the editor view.

See Also: "Example of an Approval Chain" on page 67

Each option you may perform on a checked-in content block is described below.

Button	Name	Description	For more information, see
	Edit	Check-out the content block to change it.	"Editing a Content Block" on page 39
	Edit Summary	Edit its summary.	"Adding a Content Block Summary" on page 56
	Edit Metadata	Edit its metadata.	"Adding or Editing Metadata" on page 60
	Submit/Publish	Submit content block into approval chain. If you are last approver in the approval chain, the publish button appears. If you click it, the content is immediately posted to Web site.	
	View Staged/ Published	**View Staged** button - displays content that hasn't been published yet. **View Published** button - displays content live on the Web site.	"Staged Content" on page 401
	Delete	Submit a request to delete the content into approval chain. If you are the last or only approver, the content is immediately deleted.	"Example of an Approval Chain" on page 67
	Back	Go to previous window.	

Checked Out Content

If a content block has a red border, its status is checked out, which means another user is editing it. While in this status, no other users can edit the content.
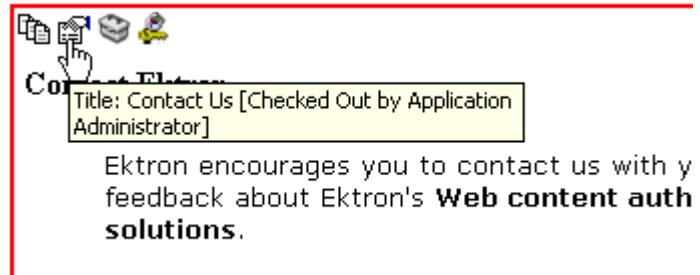
The content remains checked out until it is checked in by the check-out user or your system administrator.

Each option you may perform on a checked-out content block is described below.

Button	Name	Description
	Check In	Check in content block.
	View Staged/ Published	Click the **View Staged** button to view the content that has not yet been published. Click the **View Published** button to view the content that is live on the Web site. *See Also:* "Staged Content" on page 401
←	Back	Go to previous window.

Submitted Content

A yellow border shows that a user has submitted the content block into the approval chain. The border remains yellow until the content is published or declined. While the content is in the approval chain, no user can check it out.
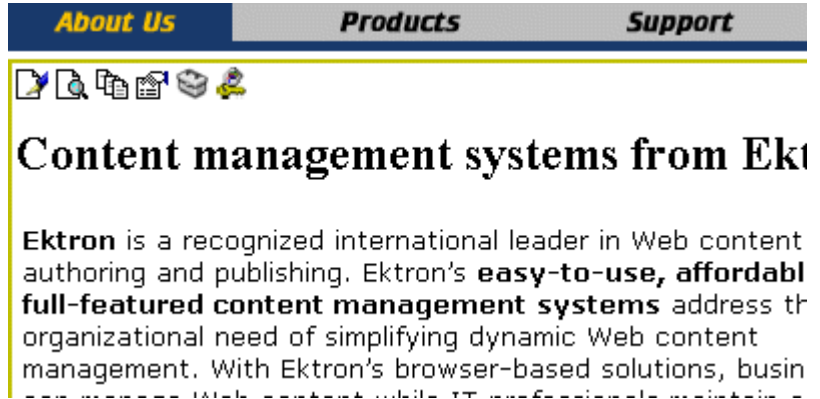
See Also: "Example of an Approval Chain" on page 67

Each toolbar button is described below.

Button	Name	Description
	Submit	Submit the content block into the approval chain. *See Also:* "Example of an Approval Chain" on page 67
	Publish	Approve and publish the content block to the Web site. NOTE: You have this option only if you are the last approver in the chain. *See Also:* "Example of an Approval Chain" on page 67
	Decline	Refuse to publish the submitted content block, and change its status to checked-in.
	Edit	Check out the content block and make changes to it. NOTE: If you edit the content block, you need to re-submit it to the approval chain.
	View Staged/ Published	Click the **View Staged** button to view the content that has not yet been published. Click the **View Published** to view the content that is live on the Web site. *See Also:* "Staged Content" on page 401

Button	Name	Description
←	Back	Go to previous window.

Marked for Deletion Content

Content that is *marked for deletion* has been requested to be removed from the Web site by a user. When a content block is marked for deletion, it goes through the approval chain like a content block that is submitted for publishing. When the content completes the approval chain, it is deleted from the Web site.

See Also: "Example of an Approval Chain" on page 67

The table below describes the toolbar buttons.

Button	Name	Description
🗑	Delete	Approve the deletion request. NOTE: If you are the last user in the approval chain, the content is deleted when you click this.
🗑	Decline	Refuse the deletion request. This sends the content block back into a checked-in status.
←	Back	Go to previous window.

Pending Start Date Content

Content that is pending a Go Live date has been approved, but its scheduled "go live" date and time have not occurred yet.

You cannot perform any action on a content block with a pending start date.

Staged Content

A staged version of a content block is one that is not published. It can be a content block that is checked in, or one that is approved with a pending a start date.

Staging lets you make changes to a content block, while keeping it from the Web site until you are ready to publish it.

Index