



Ektron CMS400.NET Administrator Manual

Version 5.5 for .Net 2.0, Revision 1

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What's New in the 5.5 Release

- A new **Roles** feature lets you assign limited administrator privileges to users. See ["Defining Roles" on page 123](#)
- A new **Content Analytics** feature tracks statistics about visits to your Web site. See ["Content Analytics Feature" on page 425](#)
- A new **Content Ratings** feature lets site visitors rate selected content. You can view the collected data. See ["Content Rating" on page 61](#)
- Improvements have been made to the export and import of **XLIFF files**. See ["Using the Language Export Feature" on page 455](#)
- There are two new types of **Custom User Properties**: SelectList Field and MultiSelectList Field. See ["SelectList Field" on page 151](#) and ["MultiSelectList Field" on page 153](#).
Also, you can search for unverified membership users, and verify them if desired. See ["The View Not Verified Users Screen" on page 192](#).
Add, you can search and select membership users. See ["Sorting Membership Users" on page 134](#) and ["Searching for Membership Users" on page 135](#)
- **Load Balancing for assets** has been introduced. See ["Load Balancing Assets" on page 599](#)
- You can now optionally add a **pre-approval** phase for tasks. See ["Automatic Creation of Tasks Associated with Content" on page 383](#)
- **Ektron CMS400.NET** now supports multiple Web sites, with each having its own domain and IP address. See ["Support for Multiple Sites" on page 479](#)
- New **security** features let you restrict the maximum number of failed login attempts, and make passwords case-sensitive. See ["Logging Into an Ektron CMS400.NET Web Site" on page 6](#)

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Introduction to Ektron CMS400.NET

Thank you for purchasing Ektron CMS400.NET, the best and most affordable solution for Web content management. We welcome you to use Ektron CMS400.NET to maintain, update, and modify the contents of your Web site. All these efforts are easily achieved while preserving the look and feel that you originally designed for your site. With Ektron CMS400.NET, the tasks of maintaining your site and updating content are passed on to subject experts. Based on the page layouts and processes that you create, the highest level of quality is preserved and maintained throughout the life cycle of the site.

See Also:

- ["About Ektron CMS400.NET" on page 1](#)
- ["Who Should Read This Documentation?" on page 2](#)
- ["Online Learning Center" on page 2](#)
- ["Sample Site Used in this Document" on page 2](#)
- ["Types of Users" on page 2](#)
- ["Management of Content" on page 3](#)
- ["Conventions of the Documentation" on page 4](#)

About Ektron CMS400.NET

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

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

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

Who Should Read This Documentation?

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

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

Online Learning Center

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

Sample Site Used in this Document

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

Types of Users

Ektron CMS400.NET lets you control the content of your Web site. The tasks of creating and maintaining your Web site are allocated

among different types of users. The types of Ektron CMS400.NET users are:

User	Job
Developer	Builds templates
Administrator	Sets up the site, adds users and user groups, sets permissions, and maintains the library
Content Contributor	Maintains Web site by adding, modifying, and publishing content.

You assign privileges to Ektron CMS400.NET users based on the actions for which they are responsible. Each user may be assigned any or all types of privileges. Users without administrative permissions are known as content contributors.

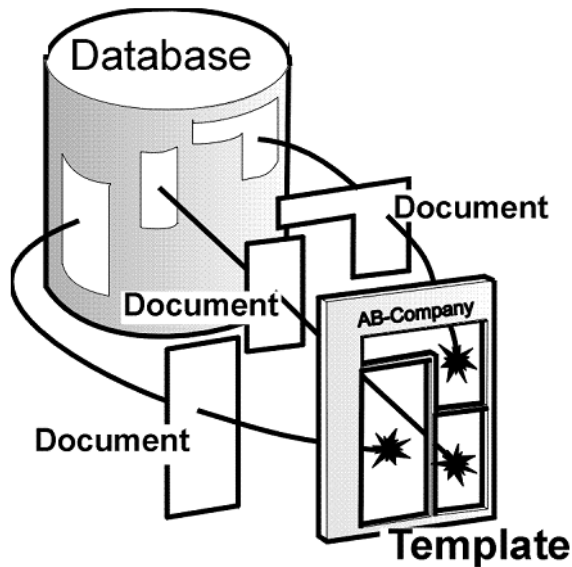
This document describes features and actions available to a user with administrative privileges. Information about Ektron CMS400.NET's editing and publishing features may be found in the Ektron CMS400.NET User Documentation.

Management of Content

The Ektron CMS400.NET content manager uses database technology to store, build, and retrieve Web page content. The placement of the content on a Web page is determined by templates, which you can build with external tools. Ektron extends VisualStudio to support the template design process.

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

assigned a unique ID. Ektron CMS400.NET uses the ID to retrieve content from the database.



If during the evolution of your site the need for a new template arises, you simply create a new one, store it in a directory accessible to Ektron CMS400.NET, and create new content that uses the new template. You can even modify the layout of an existing template, reincorporate it, and the content automatically flows into and adjusts to the new layout.

Conventions of the Documentation

This document's typographic styles and conventions are explained below.

Convention	Explanation
Bold	Bold type indicates a menu selection, field or text that you must select.
Courier New	Courier New font indicates code that you may enter.
<u>Note:</u>	Notes indicate special conditions or issues that the reader should be aware of.
WARNING!	A warning indicates very important information that should be followed. Inattention to a warning can produce undesirable results.

Convention	Explanation
<i>Italic</i>	Italic text indicates either a title that is being cited or a special use of a word that might be confused with common world terms.

Getting Started

Now that you have installed Ektron CMS400.NET, what's next? This chapter explains several resources supplied by Ektron to help get your Ektron CMS400.NET Web site up and running.

Logging Into an Ektron CMS400.NET Web Site

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

Note If needed, you can adjust the width of the login screen. This may be necessary if you use Active Directory and have long database names. Use the `ek_LoginScreenWidth` element of the web.config file to adjust the width.

Making Passwords Case Sensitive

By default, passwords are case *insensitive*. So for example, if the password is `TOKEN` and the user enters **token**, the signon is successful.

If you want to make passwords case *sensitive*, change the value of the `ek_passwordCaseSensitive` element of the web.config file from `false` to `true`. (The web.config file is located in your site's root directory.)

If you do, and the password is `TOKEN` and the user enters **token**, the signon is unsuccessful. The user would have to enter **TOKEN** to successfully sign on.

Restricting Login Attempts

Ektron CMS400.NET has a login security feature that, by default, locks out a user after five unsuccessful attempts to log in by a user on one computer. This section explains the flexibility you have in controlling this feature.

You can control the following capabilities.

- "Changing the Number of Unsuccessful Login Attempts" on page 7
- "Disabling the Login Attempts Feature" on page 9
- "Unlocking a Locked Account" on page 8
- "Preventing CMS Users from Signing On" on page 9
- "Preventing All Users from Signing On" on page 9

You control login security feature by changing the value of the `ek_loginAttempts` element in the web.config file. The following table summarizes your options.

Value	Description
any number between 1 and 254	The number of times a user can try to log in before he is locked out.
0	Lock out all users
-1	Disable feature; unlock all locked users
-2	Lock out CMS users only; membership users can still log in

Changing the Number of Unsuccessful Login Attempts

By default, if a user unsuccessfully tries to log in five times, the following error message appears: **The account is locked. Please contact your administrator.** Afterwards, even if the user enters the correct password, he is locked out, and the error message reappears.

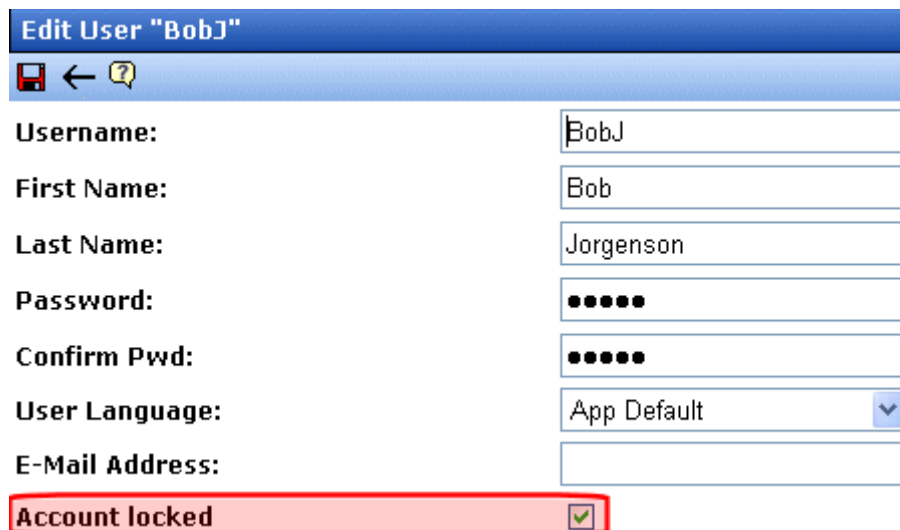
You can change the text of the error message in the resource file. To learn about editing the resource file, see "Procedure for Translating Workarea Strings" on page 477

To change the number of unsuccessful login attempts that occur prior to lockout, edit the value of the `ek_loginAttempts` element in

the web.config file. (The web.config file is located in your site's root directory.) For example, to allow only three unsuccessful logins, change the `value` to **3**. You cannot enter a value greater than **254**.

Unlocking a Locked Account

Once an account is locked out, the **Account Locked** field is checked in the user settings.



The screenshot shows a web form titled "Edit User 'BobJ'". The form contains several input fields: Username (BobJ), First Name (Bob), Last Name (Jorgenson), Password (masked with dots), Confirm Pwd (masked with dots), User Language (App Default with a dropdown arrow), and E-Mail Address (empty). At the bottom, there is a checkbox labeled "Account locked" which is checked, indicated by a green checkmark icon. The "Account locked" label and its checkbox are highlighted with a red rectangular border.

To unlock the account, an administrator user (or a user assigned to the user-admin role) accesses the Edit User screen and unchecks the box. At this point, the user can attempt to sign in again.

NOTE [If you want to unlock all locked users at once, set the value of the `ek_loginAttempts` element in the web.config file to -1. For more information about the effects of this setting, see "Disabling the Login Attempts Feature" on page 9.](#)

Manually Locking a User from Signon

You can use the **Account Locked** field (described above) to manually lock a user out of **Ektron CMS400.NET**. To do so, go to the Edit User screen, identify the user, and check the **Account Locked** field.

That user cannot sign in until either you reverse the above procedure and uncheck the box, or you change the value of the `ek_loginAttempts` element in the `web.config` file to **-1**.

Disabling the Login Attempts Feature

To disable the Login Attempts feature, set the value of the `ek_loginAttempts` element in the `web.config` file to **-1**. If you do, any user can try to log in as many times as he wants. The error message will never appear, and he will never be prevented from entering a password.

NOTE [Setting the value of the `ek_loginAttempts` element in the `web.config` file to **-1** automatically unlocks all locked accounts.](#)

Preventing CMS Users from Signing On

If you want to lock out all CMS users, set the `ek_loginAttempts` element in the `web.config` file to **-2**. If you do, only membership users can sign in.

NOTE [The builtin user cannot sign in if `ek_loginAttempts` is set to **-2**.](#)

Preventing All Users from Signing On

If you want to lock out all users (including membership users), set the `ek_loginAttempts` element in the `web.config` file to **0**. If you do, no one can sign in to **Ektron CMS400.NET** until you change the value.

NOTE [The builtin user cannot sign in if `ek_loginAttempts` is set to **0**.](#)

Changing Images Used for Logging In and Out

You can change the images used for the login and logout buttons. To do so, follow these steps.

1. Move the new images to the following folder: `webroot\your site's root directory\Workarea\images\application`.
2. Open the `web.config` file in your Web site's root directory.
3. Change the images referenced in this section of the file:

```
<add key="ek_Image_1" value="btn_close.gif" />
```

```
<add key="ek_Image_2" value="btn_login.gif" />
```

```
<add key="ek_Image_3" value="btn_login_big.gif" />
```

NOTE You must update the images and web.config each time your system is updated.

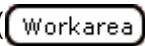

Editing Content Within Ektron CMS400.NET

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

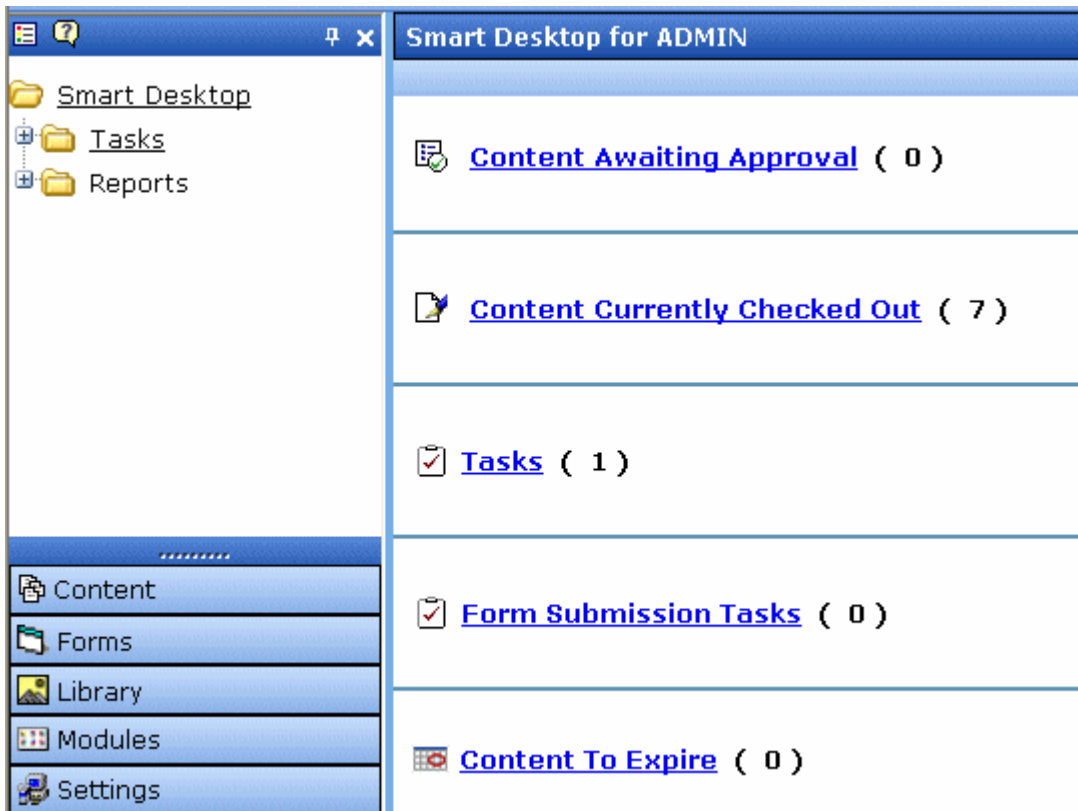
From the Web site, the user can navigate to any page and, as long as he has permission, perform all system activities, such as edit content, add content, report on forms, view calendars, etc.

Accessing the Workarea

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

1. Log in to your Web site, as described in "[Logging Into an Ektron CMS400.NET Web Site](#)" on page 6.
2. Click the Workarea button () on a login page or a **Workarea** toolbar button ().

The Workarea has a Windows Explorer-like interface.

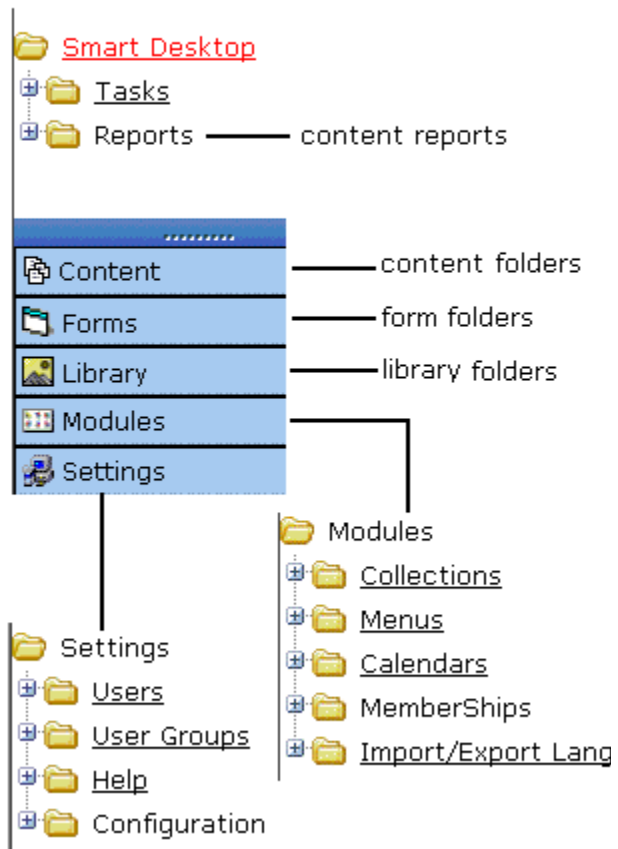


When you first access your Workarea, your Smart Desktop is displayed. The smart desktop contains useful information that pertains to you.

NOTE In the Application Setup screen, you can determine which screen appears when you access the Workarea. See Also: "Set smart desktop as the start location in the Workarea" on page 28

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

Ektron CMS Workarea Site Map



Closing the Workarea

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

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

Workarea Navigation

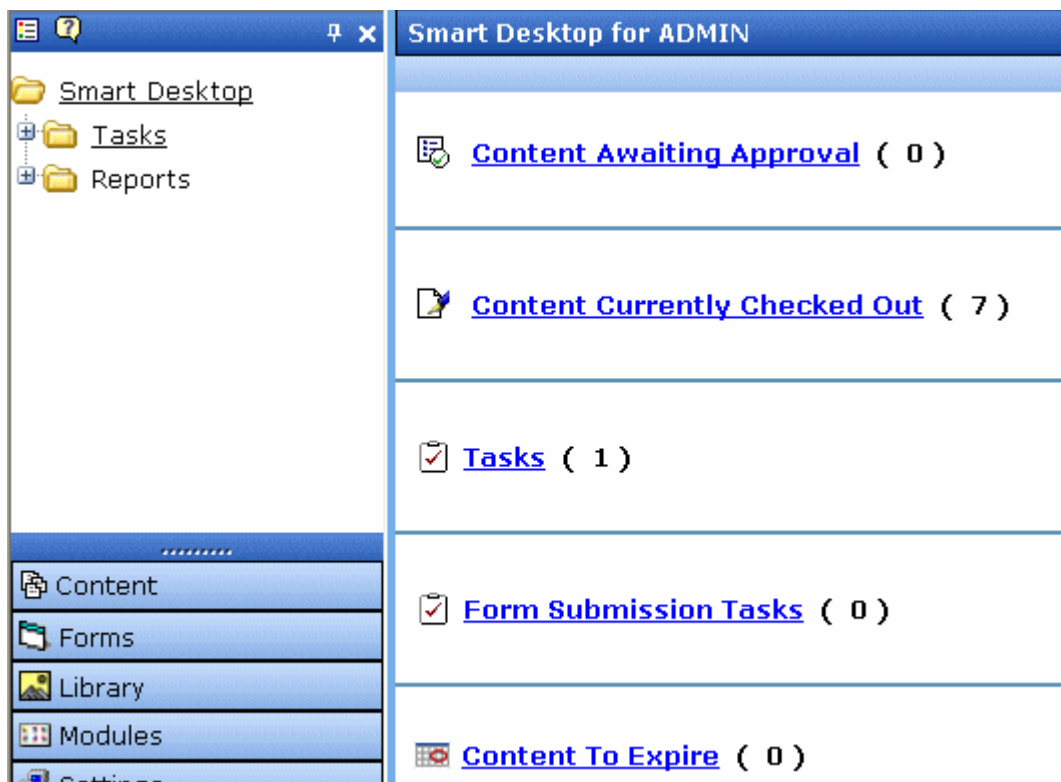
The **Ektron CMS400.NET** administrator Workarea is divided into two frames:

- the left frame displays the system's folders
- the right frame displays common reports (For more information, see "[Content Reports](#)" on page 65)

NOTE

Each category in the right frame is followed by a number indicating how many content items are in that status. **Content to Expire** lists how many content items will expire within ten days. By going to the report (**Smart Desktop > Reports > Content To Expire**) and changing the number of days, you can view a list of content to expire in that amount of time.

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



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

Recognizing Content

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

See Also: [“Returning to the Classic CMS Interface” on page 16](#)

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



[Click here to proceed to the demo site](#)

[XML Content](#)

[Show Calendar](#)

[Contact Us Form](#)

This is private content. Only users and members that have read permission

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

To see this feature, login as member / member

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

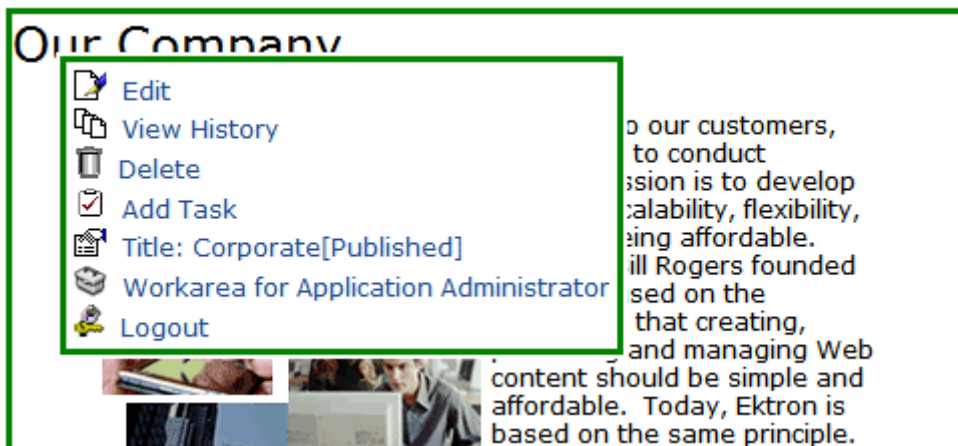
Meaning of Border Color

The table below describes the meaning of each border color.

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

The Floating Toolbar

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

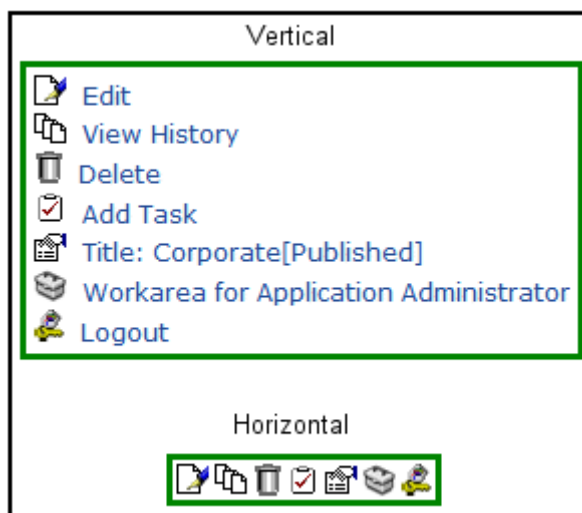


Toolbar buttons let you act on the displayed content and display important information about it. For example, one toolbar button lets you edit the content, while another displays previous versions of it. The toolbar buttons change depending on the content's status or your permissions for the content.

Each button is described in ["Floating Toolbar Buttons" on page 17](#).

Floating Toolbar Display Type

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



To change the display type, follow these steps.

1. Open web.config in your root folder.
2. Find the variable `ek_MenuDisplayType`.
3. Change its value.
 - 0** (zero) = Horizontal
 - 1** = Vertical

Returning to the Classic CMS Interface

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

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









1. Open web.config in your root folder.
2. Find the variable `ek_UserMenuType`.




3. Change its value to 1.

After you make this change, the colored borders and toolbar menu appear on a screen when it appears, and remain there.


Floating Toolbar Buttons

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

Toolbar Button	Name	Description	More Information
	Add	Appears if you selected a language and the content is not available in that language. Use this button to copy existing content into new content and translate it to the new language.	"Translating Content" on page 450
	Approve	Approve or decline request for content to be published or deleted.	"Approve ()" on page 21
	Assign Task	Assign a task related to this content.	"Managing Tasks" on page 372
	Delete	Opens content's View Content screen. From here, you can view important information about the content and perform all actions on it.	
	Edit	Checks out content to be edited by you.	"Edit ()" on page 19
	Logout	Log out of Ektron CMS400.NET view of Web site.	"Logout ()" on page 23
	Preview	Preview content before it is published.	"Preview ()" on page 22
	Properties	Opens content's View Content screen. From here, you can view information about content and perform all actions on it.	"Content Status" on page 18; "Managing Content" on page 46

Toolbar Button	Name	Description	More Information
	View Content Difference	Displays differences between historical version and published versions of content.	"View Content Difference ()" on page 20
	View History	Displays historical versions of content. You can also restore older version if needed.	"View History ()" on page 21
	Workarea	Opens the Workarea. From here, you can perform all actions.	"Workarea ()" on page 22

Content Status

After seeing content's border, you can get a more detailed status by hovering your cursor over the properties button (). When you do, the content's title and current status appear, as shown below.



Below are the content statuses and their abbreviations.

Letter	Border Color	Meaning	Content state
A	green	Approved	Through workflow and published on the Web site
O	red	Checked Out	Currently being edited. Has not been checked in.
I	green	Checked In	Checked in for others to edit

Letter	Border Color	Meaning	Content state
S	yellow	Submitted for Approval	Saved and submitted into approval chain <i>See Also: "Setting Approval Chains" on page 95</i>
M	yellow	Marked For Deletion	Requested for deletion
T		Awaiting Completion of Associated Tasks	Task(s) assigned to content are not complete
P	grey	Pending Go Live Date	Approved but "Go Live" date hasn't occurred yet
D		Pending Deletion	Content 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 is deleted.

For more information about

- content statuses, see Appendix A of the **Ektron CMS400.NET** User Manual
- content activities, see ["Managing Content" on page 46](#)

Edit ()


Ektron CMS400.NET content can be in any of several states.

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

NOTE

Once you check out content, it cannot be checked out or edited by other users until you check it in.

To edit content, follow these steps.

1. Log in to Ektron CMS400.NET, as described in ["Logging Into an Ektron CMS400.NET Web Site" on page 6](#).
2. Browse to content you want to edit.
3. Right click the mouse to display the floating toolbar.
4. Click the Edit button ()
5. The Edit Content screen is displayed.
6. From that screen, you can
 - Edit content
 - Save changes
 - Check-in content
 - Enter or edit a summary
 - Enter or edit metadata
 - Submit the content for approval
 - Publish content to the Web site
 - Access the library


For more information, see ["Editing Content" on page 54](#).

View Content Difference ()

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

Using Ektron CMS400.NET's content comparison utility, eWebDiff, you can see the changes made to the selected content.


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

1. Log in to Ektron CMS400.NET.
2. Browse through your Web site until you find content that has a staged version to be compared with.
3. If the floating toolbar does not appear, right click the mouse to display it.
4. Click the View Differences button () eWebDiff opens in a new window.




NOTE

See "Comparing Versions of Content" on page 104 for additional information about the CMS Compare utility.

Approve ()


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

To approve submitted content, follow these steps.

1. Browse to a content that is submitted and awaiting your approval.
2. *See Also:* If the floating toolbar does not appear, right click the mouse to display it.
3. Click the Approve button ()
4. The Approve Content screen is displayed.
5. Perform one of the following actions:
 - **Approve** () the content and submit it to the next approver. If you are the last approver, the content is published to the site.
 - **Decline** () the content, which checks the content in and makes it available for editing by all users with permissions

NOTE


If the content has any active tasks, a comments window pops up. You can insert comments to describe how approving or declining the content affects the task.

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

View History ()

Each time content is checked in or published, a snapshot is made of it and stored in Ektron CMS400.NET. You can access and view historical versions of the content.

To view the history for a content item, follow these steps.

1. Log in to Ektron CMS400.NET, as described in ["Logging Into an Ektron CMS400.NET Web Site" on page 6](#).
2. Find the content whose history you want to view.
3. Right click the mouse to display the floating toolbar.
4. Click the View History button (.
5. The Content History window appears.

NOTE

See ["Content History" on page 58](#) for more information about viewing, comparing, and restoring historical versions.

Preview ()


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

To preview staged content, follow these steps.

1. Log in to Ektron CMS400.NET, as described in ["Logging Into an Ektron CMS400.NET Web Site" on page 6](#).
2. Browse through your Ektron CMS400.NET Web site until you find the content you want to preview.

NOTE

Content items with staged content can either have a green or yellow border. Look for the preview toolbar button, which indicates that the content has a staged version.


3. Right click the mouse to display the floating toolbar.
4. Click the Preview button (.

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

Workarea ()

The Workarea is the centralized location of all Ektron CMS400.NET actions that you can perform. As an administrator,

you have access to many more actions than a standard user. To access your Workarea, follow these steps.

1. Log in to Ektron CMS400.NET, as described in "[Logging Into an Ektron CMS400.NET Web Site](#)" on page 6.
2. Navigate to any page that has Ektron CMS400.NET content displayed on it.
3. Right click the mouse to display the floating toolbar.
4. Click the Workarea button ().
5. The Workarea opens in a new window.

Logout ()

This button logs you out of Ektron CMS400.NET.

Site Preview

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

Modifying the Application Setup Screen

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

- License keys
- Default language
- Maximum content and summary sizes
- email notification
- Physical library folders on file server
- BuiltIn user information
- Editor options
- Work page size settings

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

- ["Enabling WebImageFX" on page 29](#)
- ["Enabling CMS to Create File System Folders" on page 29](#)
- ["BuiltIn User" on page 30](#)
- ["Editor Options" on page 31](#)

NOTE

Only members of the Administrator User Group can view and edit the Application Setup screen.


Viewing Application Setup Information

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

1. Access the Workarea. See Also: "[Accessing the Workarea](#)" on [page 10](#)
2. Click the **Settings** folder button in the left frame.
3. Expand the folder tree, and click the **Configurations** folder.
4. Click the **Setup** folder.
5. The Application Setup screen is displayed.

Updating Setup Information


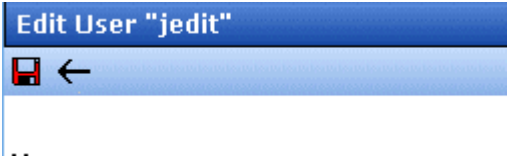
To update setup information, follow these steps.


1. Access the Application Setup screen, as described in "[Viewing Application Setup Information](#)" on [page 24](#).
2. Click the Edit button ()
3. The Application Setup screen appears. Update the fields as needed. The following table explains the fields.

Field	Description
License Key(s)	Enter the license key sent to you from Ektron via email into this field.
Module Licenses	Enter the license key for WebImageFX that was sent to you via email. See " Enabling WebImageFX " on page 29 for more information.
Default Application Language	<p>Select a default language for Ektron CMS400.NET.</p> <p>How a User's Application Language Affects His Use of Ektron CMS400.NET</p> <p>This user's language determines the screens and messages that appear within Ektron CMS400.NET.</p> <p>How the System Default Language Relates to a User's Language Setting</p> <p>In the user profile, you can set each user's language. You can set any user's language to system default. Each user whose language is set to system default uses the language assigned here.</p> <p><u>Note: Do not confuse this default application language with the ek_DefaultContentLanguage variable in web.config. For more information on that variable, see "The Default Language" on page 448.</u></p>

Field	Description
Maximum Content Size	In bytes, limit the size of each content item by specifying a maximum size. If a user's changes to content results in exceeding this limit, the user is told to reduce the size of the content before he can save it.
Maximum Summary Size	Limit the size of each summary by specifying a maximum size. If a user's changes to a summary result in exceeding this limit, the user is told to reduce the size of the content before he can save it.
System email Address	Enter a valid email address into this field. This will be the address in the From field in the notification emails.
Enable Sending of System Notification Email	Check the box to enable email notification for the entire CMS. Un-checking this box disables email notification regardless of whether individual users have their email enabled.
Asynchronous Processor Location	If your site uses the Web Alerts feature, enter or update the location of the asynchronous processor Web Services file. The default location appears below. See Also: "Setting Up the Message Queue and Asynchronous Processor" on page 168
This is a Staging Server (Only used with Site Replication)	Check this box if you use the Site Replication feature and the server on which this server resides is a staging server. If you check this box, Web alerts are not generated when content is updated. Web alerts should only be created on a production server.
Publish as PDF	Check the box to allow folder properties to be set for PDF generation. When a checked, PDF generation is available for individual folders. PDF generation for each folder is defined in the folder properties section. See Also: "Editing Folder Properties" on page 42 Note: This property appears when Ektron DMS400 v1.1 or later is installed. For more information, see "PDF Generation" on page 336.
Enable CMS to create file system folders for library assets	Check the box if you want to create physical folders on your file system machine that match the Ektron CMS400.NET library folder tree. See Also: "Enabling CMS to Create File System Folders" on page 29
Built - in User Information	Edit the username and/or password for the built in user. By default, the username and password combination is builtin/builtin . See Also: "BuiltIn User" on page 30

Field	Description
Editor Options	Toggle between displaying and not displaying font related buttons in the editor. Also choose to remove styles and preserve MS Word styles and classes. See Also: "Editor Options" on page 31
Work Page Size The following fields change the <ul style="list-style-type: none"> • default editor screen size • default Web page after sign-in • default Workarea page The default values are automatically applied to all new users, and to all existing users when you upgrade to 4.7 or higher. You can also force these values on all users, removing their ability to personalize them.	
Width	If desired, change the width of the screen in which Ektron CMS400.NET appears. The width in pixels must be between 400 and 2400. This field accommodates users who have larger monitors and/or prefer a higher resolution, such as 1280 x 1024. The default value for this setting is 790.
Height	If desired, you can change the height of the screen in which Ektron CMS400.NET appears. The height in pixels must be between 300 and 1800. This field accommodates users who have larger monitors and/or prefer a higher resolution, such as 1280 x 1024. The default value for this setting is 580.

Field	Description
Display button text in the title bar	<p>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</p>  <p>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.</p> 
Landing Page after login	<p>If you want one page in your Web site to appear after users sign in, enter the URL to that page. You can click Select Page to browse to the landing page. The last published version of the page appears. If the page has never been published, nothing appears.</p> <p>By default, the page from which the user logged in reappears.</p>
Set smart desktop as the start location in the Workarea	<p>If you want the Smart Desktop to appear as soon as users enter the Workarea, click inside this check box.</p> <p>See Also: "Workarea Navigation" on page 13</p> <p>By default, the user sees the Smart Desktop after sign in.</p> <p>If you leave this check box blank, when you enter the Workarea, you go to the folder of the content specified at the Landing Page after login field.</p>
Force preferences to all users	<p>To force these settings on all Ektron CMS400.NET users, check this box. If you do, users can see the values in the user profile screen but not change them.</p> <p>If you leave this box blank, users can personalize these values in their User Profile.</p>
Enable Verify email?	<p>Check this box if users should be notified whenever they subscribe to an email notification list. See Also: "What Happens if Verification email is Used" on page 190</p>

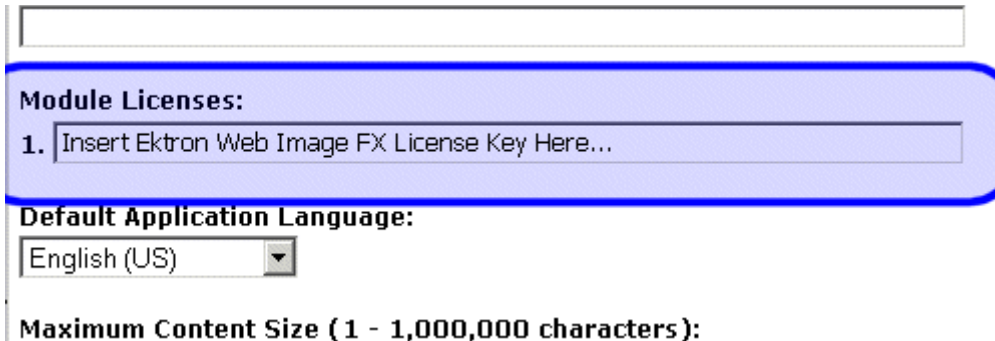
4. Make the necessary changes.
5. Click the Update button ()

Enabling WebImageFX

When purchasing Ektron CMS400.NET, you had the option to purchase Ektron WebImageFX as well. WebImageFX is an imaging application that allows users to edit images online.

If you purchased WebImageFX when you purchased Ektron CMS400.NET, you should have received an email with a license key for WebImageFX as well.

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

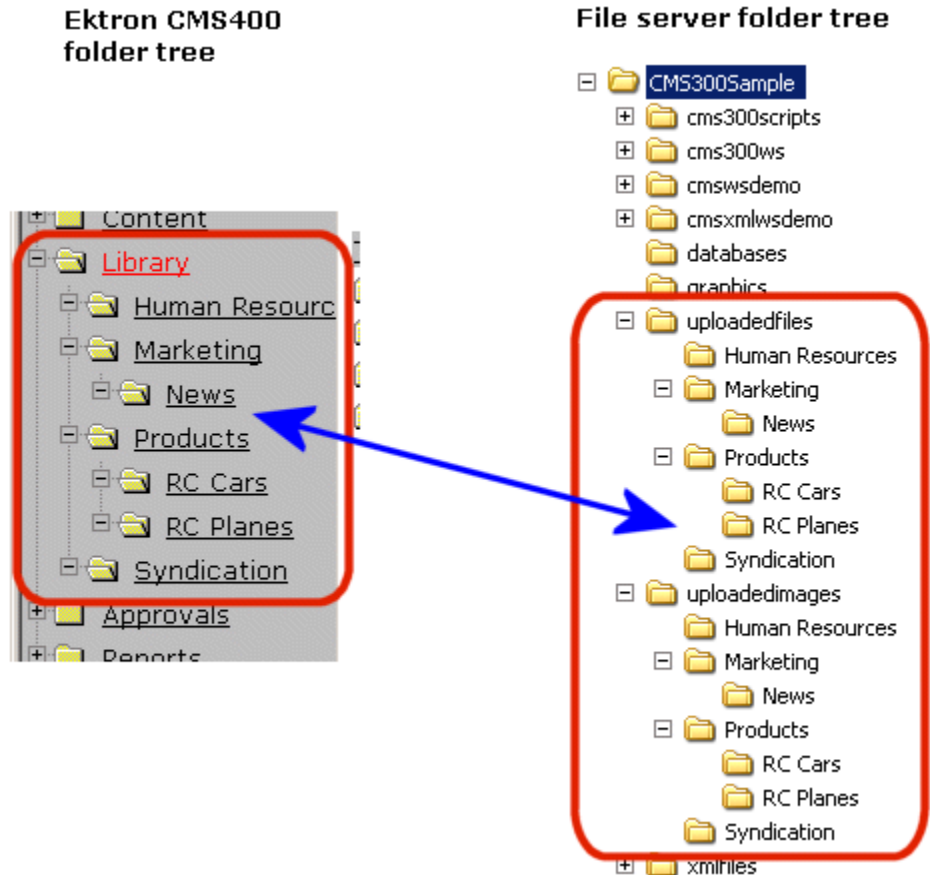


The screenshot shows a web application setup interface. At the top is a long, empty text input field. Below it is a section titled "Module Licenses:" with a blue background and a rounded border. Inside this section is a numbered list with one item: "1. Insert Ektron Web Image FX License Key Here..." followed by a text input field. Below the "Module Licenses:" section is another section titled "Default Application Language:" with a dropdown menu currently set to "English (US)". At the bottom of the visible area is the text "Maximum Content Size (1 - 1,000,000 characters):".

Enabling CMS to Create File System Folders

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

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



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

BuiltIn User

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


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

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

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

Editing the BuiltIn User

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

1. Accessing the Edit Application Setup Information screen, as described in ["Updating Setup Information" on page 25](#).
2. Locate the **Built In User** field.
3. Edit the built in user information by changing the username and password.
4. Click the Update button ().

Editor Options

Style sheets greatly reduce the source code (and thereby the size of) a content. For this reason, they are becoming more popular than font-related tags for marking up content.

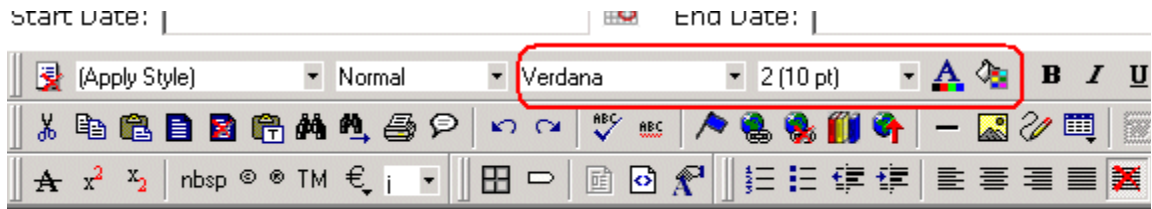
The editor options section lets you determine how the editor handles this issue.

The following table explains the editor options you may set.

Editor Option	Description
Enable Font Buttons	<p>This option displays the following font-related buttons on the editor toolbar:</p> <ul style="list-style-type: none"> • Font Face • Font Size • Font Color • Font Background Color <p>See Also: "Enable Font Buttons" on page 33</p> <p><u>Note: If Remove Styles is checked (see below), all inline styles added to the content are removed when the HTML is cleaned.</u></p>
Disable Font Buttons	<p>This option removes the buttons specified above. If you choose this option but want to let users apply font related attributes to text, set up a style sheet for the content folder to which the content belongs.</p> <p>See Also: "Disable Font Buttons" on page 33</p>
Remove Styles/ Do not Remove Styles	<p>If Remove Styles is checked, all inline styles added to the content are removed when the HTML is cleaned.</p> <p><u>Note: Ektron recommends removing inline styles. It gets rid of inline styles added to content pasted from Microsoft Word.</u></p>
Preserve MS-Word Styles (only available if you choose Do not Remove Styles)	<p>When content from MS Word is cut and pasted into the editor, the editor, by default, removes some MS Word styles. Preserving MS Word styles prevents the editor from removing them.</p> <p><u>Ektron does <i>not</i> recommend enabling this feature.</u></p>
Preserve MS-Word Classes	<p>Similar to styles, when content from MS-Word is cut and pasted into the editor, the editor, by default, removes some MS-Word classes. Checking this box prevents the editor from removing them.</p>

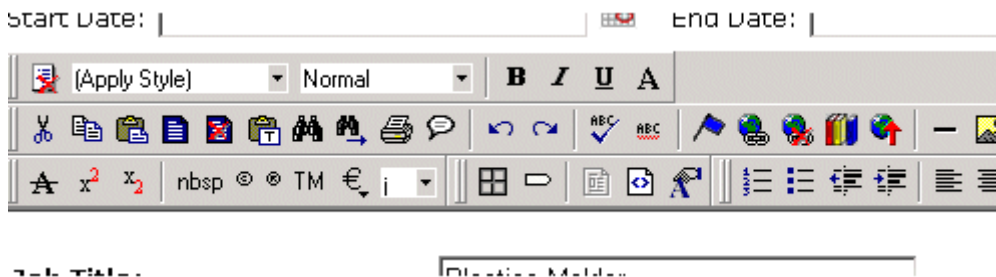
Enable Font Buttons

Here is the editor with font related buttons enabled.



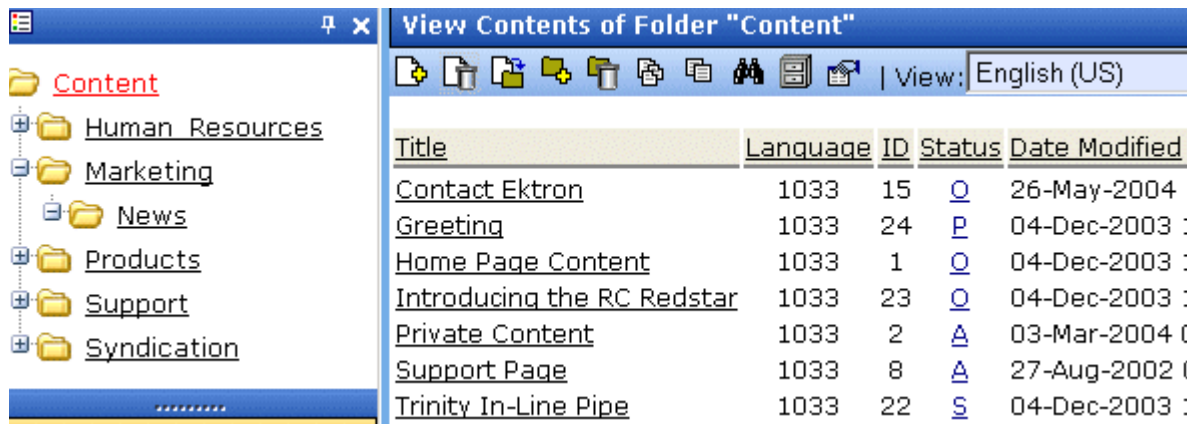
Disable Font Buttons

Here is the editor with the font buttons disabled.



Managing Content Folders

An administrator can control every aspect of the content and the folders that hold them. The controls include setting permissions, approvals, and adding, editing, publishing, and deleting content. Below is the content folder.



This chapter explains how to add, edit, publish, and delete content. It includes the following information:

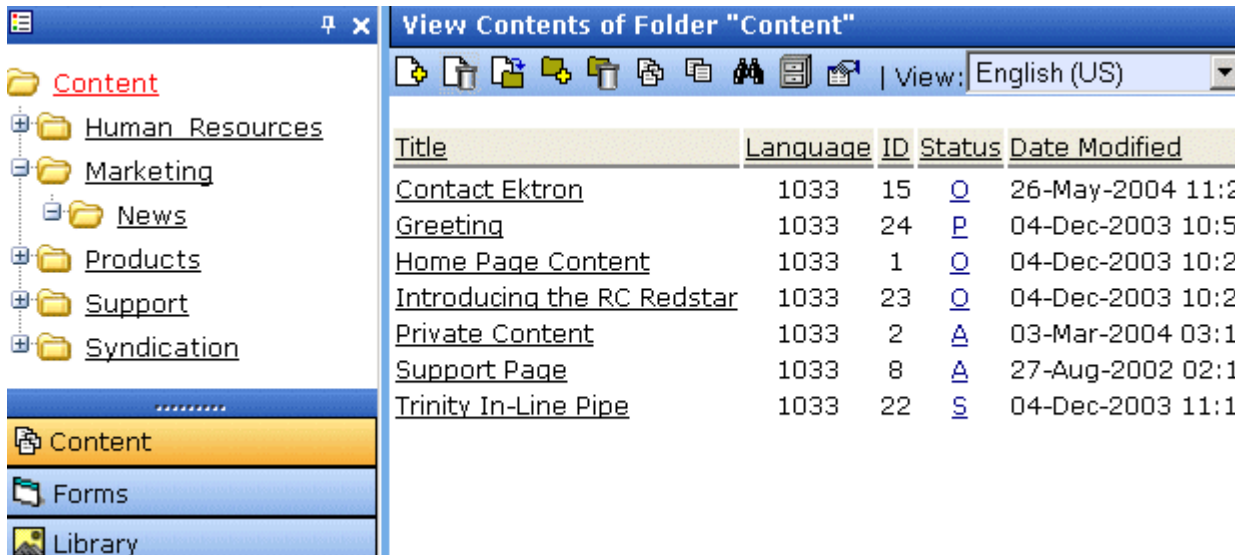
- "Accessing the Content Folder" on page 34
- "Folder Properties" on page 38
- "Purge History" on page 43
- "Adding Subfolders" on page 44
- "Deleting Folders" on page 45
- "Search Content Folder" on page 45

Accessing the Content Folder

To access a content folder, follow these steps.

1. Access the Workarea.
2. Click the **Content** folder in left side of the Workarea.

3. All content in the root content folder appears in the main section of the Workarea, and the content folder expands to display the subfolders.











NOTE To learn about modifying the folder display, see ["Modifying the Folder Display" on page 37](#).


From this screen, you can perform administrative actions and maintain content. Each folder displays the following information about its content.

Field	Description
Title	The name given to the content by the creator.
Language	The content's language. See Also: "Working with Multi-Language Content" on page 442
ID	The number Ektron CMS400.NET assigns to the content. It is used to retrieve the content from the database.
Status	The content's status. See Also: "Content Status" on page 18

Field	Description
Date Modified	The most recent date that the content was added, edited, or published.
Last Editor	The last user who accessed the content.

Additionally, each folder has the following toolbar buttons.

Button	Name	Description	More Information
	Add Content	Open the editor and create new content in the current folder.	"Adding Content" on page 48
	Delete Content	Delete several content items at once.	"Deleting Content" on page 58
	Move/Copy Content	Move or copy content to another folder.	"Moving or Copying Content" on page 54
	Add Folder	Create a subfolder below the current folder.	"Adding Subfolders" on page 44
	Delete Folder	Delete the current folder. <u>Note: You cannot delete the parent folder, Content.</u>	"Deleting Folders" on page 45
	Collections	Add, edit, or delete a collection from the folder.	"Collections" on page 402
	Search	Search through content in the Workarea.	"Search Content Folder" on page 45
	Archived content	Displays content that passed its scheduled End Date and whose archive option is either Archive and remove from site or Archive and remain on Site	See the Ektron CMS400.NET User manual section "Scheduling Content to Begin and End" > "Setting Archive Options"

Button	Name	Description	More Information
	Properties	View properties of current folder. In the properties window, you can set permissions, approvals, etc.	"Folder Properties" on page 38

Modifying the Folder Display

Ektron CMS400.NET provides two techniques for displaying the folder tree:

- classic - used in previous versions of **Ektron CMS400.NET**
- Ajax - available only in version 5.1 or higher

The following table contrasts the two techniques.

Technique	How it Works	Advantage
Classic	Fetches all folders and subfolders while initially displaying the Workarea	While initial wait time may be longer, the wait time for opening child folders is shorter
Ajax	Initially fetches only folders one level below Content (root) folder. Subsequent levels are fetched when user clicks the parent folder.	Can reduce initial wait time that occurs when displaying the Workarea

By default, **Ektron CMS400.NET** uses the Ajax technique. To change it to Classic, open the web.config file in your site root and change the value of the `ek_treemodel` setting from one (1) to zero (0).

To change the technique back to Ajax, change the value of the `ek_treemodel` setting from zero (0) to one (1).

Folder Properties


The folder properties screen lets you set permissions and approvals for a folder. You can also assign or modify the folder's metadata and Web Alerts.

NOTE

Only members of the Administrator User Group and those defined in the Manage Members for Role: Folder User Admin screen can view, add, or edit folder properties. (See Also: "Defining Roles" on page 123) In addition, if a user is not a member of the Administrators group, he must be given permission for individual folders on the Folder Properties > View Permissions for Folder screen. (See Also: "Setting Permissions" on page 86)

Accessing the Folder Properties Screen

To access the folder properties screen, follow these steps.

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

View Properties for the folder "Content"

English (U.S.)

Properties | **Metadata** | **Web Alerts**

Foldername:

Content

ID:

0

Description:

Home

Style Sheet filename for this folder:

/CMS400Example/default.css

Template filename for this folder(affects future content):

contentblock.aspx

XML Configuration:

[None Specified] HTML Content Assumed

Should documents added to this folder be published in other format?

Publish Office documents as HTML

The table below describes the fields on the Folder Properties screen.

Fields on the Folder Properties Screen



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






Tab	Field	Description
	Style Sheet filename for this folder: (leave blank to inherit)	<p>Specify a style sheet that defines the styles of the content within the content folder. Or, leave this field blank to inherit the style sheet from the parent content folder.</p> <p><u>This style sheet affects content while being edited but has no effect on how the content appears on your Web site. To set or edit the style sheet that determines how your Web pages display, open the page's Web form and place a <code><link rel="stylesheet"... tag within its <HEAD> tags.</code></u></p>
	Template filename for this folder: (leave blank to inherit)	<p>Specify a new template for the content folder. Or, leave this field blank to inherit the template from the parent content folder.</p> <p>Content in this folder appears on your Web site within the template you choose. See Also: "Creating/Updating Templates" on page 47</p>
	XML Configuration	<p>Choose the XML configuration to assign to the content folder from the drop down list, or check off the inherit box to inherit the XML configuration from the parent content folder.</p> <p>See Also: "Assigning XML Configurations" on page 204</p>
	<p>Should Office documents added to this folder be published in other format?</p> <p><u>Note: This field only appears if the Enable Office documents to be published in other format property is checked in the Settings > Configuration > Setup screen. See Also: "Updating Setup Information" on page 25</u></p> <p>(continued on next page)</p>	<p>Select Publish Office documents as PDF, Publish Office documents as HTML, or No to elect neither choice.</p> <p>Publish Office documents as PDF</p> <p>(This field only appears if the Publish as PDF property is checked in Settings > Configuration > Setup.)</p> <p>Select this option if Office documents in this folder are published as PDF files. See Also: "PDF Generation" on page 336</p>

Tab	Field	Description
	Should Office documents added to this folder be published in other format? (continued)	<p>Publish Office documents as HTML</p> <p>Select this option if you want to publish Office documents in this folder in an HTML format.</p> <p>If you select this option, Office documents are transformed to HTML format, which means they are formatted to display within a browser. As a result, anyone visiting your site can view the document, whether or not they have Microsoft Office software installed on their computer.</p> <p>If you do not elect this option, nor Publish Office documents as PDF, a site visitor without Microsoft Office software cannot view a page that contains an Office document.</p> <p><u>Note: Only Microsoft Word, Excel, and PowerPoint files can be published as HTML.</u></p> <p><u>Note: This property is not inherited from a parent folder, nor is it inherited by any subfolders below this folder.</u></p> <p>For more information about working with Office documents, see the Ektron CMS400.NET User Manual section "Using the Document Management Functionality"> "Working with Office Documents."</p>
Metadata	Metadata/Custom-Fields available for folder	See "Assigning Metadata to a Folder" on page 80
Web Alerts	Web Alert fields for this folder	See "Assigning Web Alert Information to Content" on page 186

Folder Properties Toolbar

The Folder Properties screen contains these toolbar buttons.

Button	Name	Description	More Information
	Edit Properties	Access the Edit Folder Properties screen	"Editing Folder Properties" on page 42
	Permissions	Access the folder's Permissions Table	"Setting Permissions" on page 86


Button	Name	Description	More Information
	Modify Preapproval Group	Set or update preapproval group assigned to folder	"Assigning a Preapproval Group to a Folder" on page 385
	Approvals	Access the folder's approvals table	"Setting Approval Chains" on page 95
	Purge History	Access the folder's purge history table	"Purge History" on page 43
	Restore Web Alert Inheritance	Assigns the folder's Web Alert properties to all content in folder	"Inheriting Content-Level Web Alert Information from Its Folder" on page 188
	Back	Go to previous screen	

Editing Folder Properties



A content folder's properties consist of

- name
- description
- style sheet
- template
- XML configuration
- Metadata

To edit any properties for a folder, follow these steps.

1. Access the View Properties screen for the folder you want to edit, as described in ["Accessing the Folder Properties Screen" on page 38](#).
2. Click the Edit button ().
3. The Edit Properties screen for the content folder is displayed.

Edit Properties for the folder "Content"


Foldername:
Content


Description

Style Sheet filename for this folder: (leave blank to inherit)
/CMS300Sample/default.css

Template filename for this folder: (leave blank to inherit)
/CMS300Sample/index.asp

▼

XML Configuration:
☐ Inherit XML Configuration
 ▼ 

4. Make the necessary changes to the content folder's properties. See ["Fields on the Folder Properties Screen" on page 39](#).
5. Click the Update button ().


Purge History

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


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

NOTE Only Ektron CMS400.NET administrators and users identified on the [Manage Members for Role: Folder User Admin](#) screen can purge history.

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



1. Access the View Folder Properties screen for the content folder you want to purge the history for, as described in "[Accessing the Folder Properties Screen](#)" on page 38.
2. Click the Purge History button ().
3. The Purge History screen appears.
4. Use the following table to modify the Purge History options.

Field	Description	Required?
Select Date	Specify a date to limit the number of historical versions to purge. When specified, only historical versions with a date before this date are purged.	Yes
Recursive	Purges historical records for content in this folder's subfolders.	No
Purge versions marked as Published	Purges published versions of content as well as checked-in versions.	No

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

Adding Subfolders

To further organize content on your Web site, create subfolders to store related content. To add a sub folder, follow these steps.

1. Navigate to and click the folder within which you want to create a subfolder.
2. Click the Add Folder button ().
3. The Add a Subfolder to Folder screen is displayed.
4. Enter the required information in the fields. See "[Fields on the Folder Properties Screen](#)" on page 39.
5. Click the Save button ().

You can modify the subfolder's properties, permissions, approval chain, etc. For a list of options, see "[Folder Properties Toolbar](#)" on [page 41](#).


Deleting Folders

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

CAUTION!

Deleting a content folder permanently deletes the content and Quicklinks that belong to the content folder, as well as its subfolders.

To delete a content folder, follow these steps.

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

Search Content Folder

You can search a folder to locate content within your Web site. Use this feature to find content when you know the text that needs to be updated but are unsure of its folder or where it is on the Web site.

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

To learn more about searching through folders on **Ektron CMS400.NET**, see the following section of the **Ektron CMS400.NET** User Manual "Working with Folders and Content" > "Search Content Folder."

Managing Content

When you enter the Content folder in Ektron CMS400.NET as an administrator, you can control every aspect of the content and folders. Some controls include setting permissions, approvals, and adding, editing, publishing, and deleting content. Below is an example of the Content folder.

Title	Language	ID	Status	Date Modified
Contact Ektron	1033	15	O	26-May-2004 10:00
Greeting	1033	24	P	04-Dec-2003 10:00
Home Page Content	1033	1	O	04-Dec-2003 10:00
Introducing the RC Redstar	1033	23	O	04-Dec-2003 10:00
Private Content	1033	2	A	03-Mar-2004 03:00
Support Page	1033	8	A	27-Aug-2002 00:00
Trinity In-Line Pipe	1033	22	S	04-Dec-2003 11:00

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

See Also:

- ["Creating/Updating Templates" on page 47](#)
- ["Adding Content" on page 48](#)
- ["Forming URLs For Ektron CMS400.NET Documents" on page 52](#)
- ["Viewing Content" on page 53](#)



- "Editing Content" on page 54
- "Moving or Copying Content" on page 54
- "Deleting Content" on page 58
- "Content History" on page 58
- "Content Permissions" on page 59
- "Content Approvals" on page 59
- "Link Checking" on page 59
- "Assigning Tasks to Content" on page 59
- "Content Properties" on page 59
- "Content Rating" on page 61

Creating/Updating Templates

During the setup of your **Ektron CMS400.NET** Web site, templates were created for your Web pages. A template typically includes page headers and footers as well as placeholders for content, forms, summaries, calendars, collections, or other page elements.

You specify content's template in its folder. The folder can have a unique template or inherit a template from its parent folder. The following illustration specifies where to identify a template in the Folder Properties screen.

Edit Properties for the folder "Content"


Foldername:
Content

Description

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

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

XML Configuration:
☐ Inherit XML Configuration



If your Web developer creates a new template after you site goes live, you do not see it in the **Select an Existing template** drop-down box. However, you can delete the value of the **Template filename for this folder** field and enter the new template.

If the new template is not in your site root folder, precede the folder name with the folder path relative to the site root. For example,
customer survey/survey.aspx.

Adding Content

There are several types of content used in Ektron CMS400.NET:

- **HTML** - Content created using HTML code.
- **Forms** - Users can create and maintain HTML forms to collect information from visitors to your Web site.

- **XML** - Content created using an XML configuration
- **Microsoft Office Documents** - Content created in Microsoft Office and stored in CMS400.NET via the Document management functionality.
- **Open Office Documents** - Content created Open Office and stored in CMS400.NET via the Document management functionality.
- **Managed Files** - Content created with software external to the CMS and stored in CMS400.NET via the Document management functionality. These files are typically .pdf, .gif, .jpeg, .zip, and .txt files.

Office documents and Managed files are added to the CMS in one of two ways:

- By dragging and dropping files from Windows Explorer to the drag and drop box in the Workarea. See *A/so: The User Manual* section “Using the Document Management Functionality” > “Importing Files via Drag and Drop”
or
- By choosing the type of content from the Content Type dropdown box. Then, clicking the Add Content button or Add Several Files button. See *A/so: The User Manual* section “Using the Document Management Functionality”

Whether you create HTML or XML content depends on the folder’s XML Configuration setting. An XML folder has an XML configuration assigned to it. If a folder does not, the content folder creates HTML content.

See *A/so:*

- ["Adding HTML Content" on page 50](#)
- ["Adding XML Content" on page 50](#)
- ["Creating New Content" on page 449](#)
- ["Translating Content" on page 450](#)

Adding HTML Content

See the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Adding Content”.

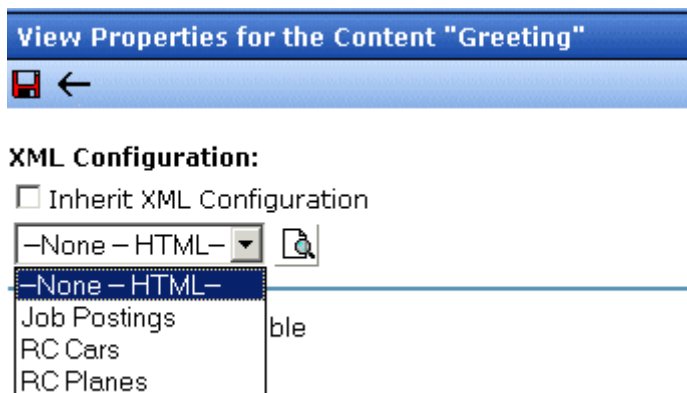
Adding XML Content

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

Assigning an XML Configuration



You can assign an XML configuration to an individual content item or its parent folder. Similarly, a folder (other than the root content folder) can have a unique XML configuration or inherit one from the parent folder. See *Also*: ["Assigning XML Configurations" on page 204](#)

XML Configuration on Content Properties Screen



XML Configuration on Folder Properties Screen

Edit Properties for the folder "Human_Resources"

Foldername:

Description


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

The inherited style sheet for this folder is: /cms300sample/default.cs

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

XML Configuration:

☐ Inherit XML Configuration



Adding XML Content

To add XML content, follow these steps.

1. In your Workarea, browse to an XML content folder where you want to create the new XML content. (For more information, see ["Assigning an XML Configuration" on page 50.](#))

NOTE

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

2. Follow the steps described in ["Adding HTML Content" on page 50.](#)

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

If content has an XML configuration, it is used to format the screen display. When XML content is published and a site visitor completes the XML screen, the user's input is saved as XML. For more information, see ["Managing XML" on page 196](#).

Forming URLs For Ektron CMS400.NET Documents

Whenever content is created, **Ektron CMS400.NET** generates a unique identifier of that content. See *A/so: Ektron CMS400.NET User Manual* > "Library Folder" > "Quicklinks and Forms."

The identifier for Ektron CMS400.NET content is made up of these elements:

- Site address
- ["The Template" on page 52](#)
- ["The Content Variable" on page 53](#)
- ["The Language Identifier" on page 53](#)

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

Web Site Address	Template	Content Block ID #	Language Identifier
http://www.yoursite.com/news.asp?id=9&LangType=1036			

The Template

The default template URL is the address of the default template file in the Web server's file system. By itself, the template URL retrieves the empty template or the template with its default document.

NOTE You can set a default document for a template in the content function by inserting an id number.

The Content Variable

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

Content variable	Example	Description
ID=n	<code>http:// www.yourEktronwebsite.com / index.aspx?ID=1</code>	ID selects a single document to display. This variable would be used for a template of the single document template type. The value corresponds to the content's id value.

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

The Language Identifier

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

To learn more, see ["Multi-Language Support" on page 442](#).

Viewing Content

See the **Ektron CMS400.NET** User Manual Section "Working with Folders and Content" > "Viewing Content".

NOTE

You can use the `ek_PageSize` setting in the `web.config` file to determine the maximum number of items that can appear on a page before it "breaks." When a page breaks, additional entries appear on another screen, and the following text appears near the bottom of the items list:

Page 1 of 2

[\[First Page\]](#) [\[Previous Page\]](#) [\[Next Page\]](#) [\[Last Page\]](#)

Editing Content

See the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Editing Content”.

Moving or Copying Content

You can *move* content from any folder to any other folder. Or, you can *copy* content from one folder to another.

At the end of both procedures, a copy of the content resides in the new folder. The new content gets the next available `Content Id` number.

When copying, you *leave* the content in its original folder, while moving *deletes* the content from the original folder.

Other than that difference, the procedure for performing both actions is virtually identical. This section explains how to move or copy content.

Who Can Move or Copy Content?

Only members of the Administrators user group can move or copy content.

Which Content Can Be Moved Or Copied?

Only content with a status of Approved (Published) can be moved or copied. This includes expired content. If the content’s status is not published, you must wait for it to reach that status before moving or copying it.

Before You Move Or Copy Content

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

Content to be moved or copied	Destination Folder	Issues?
HTML	HTML Only	None
	XML Content Folder	Content does not use XML configuration applied to content folder. If you want it to, assign the XML configuration in the Content Properties screen.
XML (inherited from parent)	HTML Only	Content inherits properties of the destination folder. Can be changed on the folder or content levels.
	XML Content Folder	
XML (not inherited from parent)	HTML Only	Content keeps assigned XML configuration. Can be changed on the folder or content levels.
	XML Content Folder	

What is Moved Or Copied?


When content is moved or copied, it inherits permissions and workflows from the destination folder. Also, the Quicklink for the content is moved or copied in the library to the destination folder. However, the Quicklink remains the same (that is, the default template doesn't change). You can update this by editing the Quicklink. This procedure is described in the **Ektron CMS400.NET** User Manual section "Updating Default Template for Multiple Quicklinks."

NOTE If the Link Management setting in the web.config file is set to `true`, you do not need to update the quicklink. Link Management automatically finds the correct template based on the current content folder.




If the destination folder already has content with the same title, **Ektron CMS400.NET** appends a number to the end of the title to make it unique. For example: `ASP.NET Unleashed(2)`.

Moving Or Copying One Content Item

To move or copy content to another folder, follow these steps.

1. Access the View Content screen for the content you want to move or copy, as described in "[Viewing Content](#)" on page 53.
2. Click the Move/Copy Content button (.
3. The Move/Copy Content screen is displayed.
4. Select either **Move** or **Copy**.
5. If you choose **Copy**, and you want the content to be published as soon as the copying is complete, check **Publish Copied Content**.
If you want the content status in the new folder to be checked in, uncheck the **Publish Copied Content** checkbox.
6. Enter the path to the destination folder. If you don't know the path, click **Select Folder**. Then, navigate to the destination folder.

Move/Copy Contents of Folder "Content"






☒ Move
 ☐ Copy
 ☒ Publish Copied Content

Destination Folder:
Select Folder

<input type="checkbox"/> Title	ID	Status	Date Modified	Last Editor
<input type="checkbox"/> CMS Developer	12	CheckedOut	8/9/2005 10:37:59 AM	Administrator
<input type="checkbox"/> I'm adding new content	393	Approved	11/8/2005 4:52:31 PM	Edit


NOTE Only approved or expired content have a checkbox in the left column. Content in other statuses cannot be moved or copied.

7. Click the Move/Copy Content button (.
8. A confirmation message is displayed.
9. Click **OK** to continue.
10. The content is moved or copied to the specified content folder.
The destination folder appears with the new content.

Moving Or Copying Several Content Items

To move or copy several content items in the same folder at once, follow these steps.




NOTE Only published and expired content can be moved or copied.

1. Navigate to the folder that contains the content you want to move or copy.
2. Click the Move/Copy Content button ().
3. The Move/Copy Contents of Folder screen is displayed.
4. Select either **Move** or **Copy**.
5. Enter the path to the destination folder. If you don't know the path, click **Select Folder**. Then, navigate to the destination folder.
6. Check the boxes next to the content that you want to move or copy.

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

7. Choose the content folder to move or copy the selected content from the drop down list.


Move/Copy Contents of Folder "Content"

☒ Move
☐ Copy ☒ Publish Copied Content

Destination Folder: Select Folder

<input type="checkbox"/>	<u>Title</u>	<u>ID</u>	<u>Status</u>	<u>Date Modified</u>	<u>Last Editor</u>
<input type="checkbox"/>	CMS Developer	12	CheckedOut	8/9/2005 10:37:59 AM	Administrator
<input type="checkbox"/>	I'm adding new content	393	Approved	11/8/2005 4:52:31 PM	Edit

8. Click the Move/Copy Content button () to move or copy the selected content.
9. A confirmation message is displayed.
10. Click **OK**.

11. The content moves to the destination folder.

Viewing and Restoring Historical Versions of Content

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

For more information, see the “Viewing and Restoring Previous Content” section of the **Ektron CMS400.NET** User Manual.

Purging Historical Versions of Content

See ["Purge History"](#) on page 43.

Scheduling Content

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

For more information, see “Scheduling Content to Begin and End” in the **Ektron CMS400.NET** User Manual.

Deleting Content

See the **Ektron CMS400.NET** User Manual Section “Working with Folders and Content” > “Deleting Content”.

Content History

See the **Ektron CMS400.NET** user manual section “Viewing and Restoring Previous Content”.

Content Permissions

See ["Setting Permissions" on page 86](#).


Content Approvals

See ["Setting Approval Chains" on page 95](#).

Link Checking

The link checker button allows you to locate all content that has a link to the displayed content. This feature is very useful if you decide to delete content. You can use this to remove those links, which will no longer work after the deletion.

To display all content that links to the selected content, follow these steps.


1. Access the View Content screen for the content you want to execute the link checker for, as described in ["Viewing Content" on page 53](#).
2. Click the Check Links button ().
3. A search results screen displays each content item with a link to the current content.
4. Click the content title to access the View Content screen for the selected content and perform the necessary actions on it.

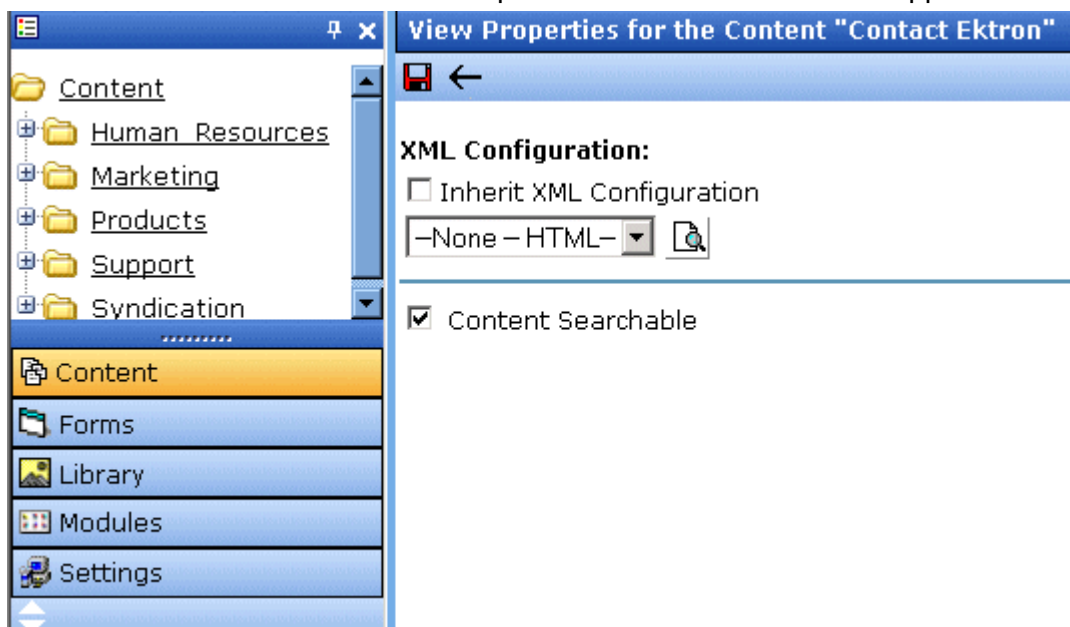
Assigning Tasks to Content

See the **Ektron CMS400.NET** User's Manual > "Managing Tasks" > "Creating Tasks via Content".

Content Properties

The content properties screen shows which XML configuration, if any, is applied to the content, and whether a search will find the content. To view the Content Properties screen, follow these steps.

1. Access the View Content screen for the content whose properties you want to view, as described in ["Viewing Content" on page 53](#).
2. Click the Properties button (.
3. The View Properties for the Content screen appears.



4. Make any necessary changes.

Field	Description
Inherit XML Configuration	See "Assigning XML Configurations" on page 204
Content Searchable	Check this box if you want this content to be included in an external search of your CMS Web site. If you uncheck this box, Ektron CMS400.NET excludes this content when a search is performed. See Also: "Searching Content on the Web Site" on page 439

5. Click the Update button (.

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

Content Rating

Ektron CMS400.NET lets you place a rating scale on any content on your Web site. The scale lets you collect feedback by giving site visitors the opportunity to rate the content. A visitor can rank the content on a numerical scale of one through nine, as well as submit a text comment (see illustration below).

NOTE The user's browser must have cookies enabled in order to submit a content rating.

challenges they faced and that they most valued in a services solution. Based on this valuable feedback, Acme developed its first services management platform solution built around Acme's market-leading tool. The response was outstanding, as it became immediately clear that there was a real need for services management solutions that are easy-to-use and integrate.

Today, Acme's family of products has evolved and grown—with tools and solutions that encompass the latest technologies and solve everyday services problems.

How would you rate the usefulness of this content?

Poor 1 2 3 4 5 6 7 8 9 Outstanding

Rating Level: : 6/9

Optional: Tell us why you rated the content this way

Very helpful -- lots of good information!

Characters Remaining: 983 Submit

5 Total Ratings

The content rating feature is explained through the following topics.

- ["Inserting the Content Rating Server Control" on page 62](#)

- ["Limiting Visitors to One Rating" on page 62](#)
- ["Viewing the Content Rating Report" on page 63](#)

Inserting the Content Rating Server Control

To have a content ratings graph appear on a Web page, your developer inserts a server control. This procedure is described in the **Ektron CMS400.NET** Developer Manual section "Content Rating Server Control."

Limiting Visitors to One Rating

Ektron CMS400.NET assumes you want to limit a user to rating a content item once. If a regular or membership user logs in before rating a piece of content, **Ektron CMS400.NET** remembers the user ID. If any other site visitor does not log in before rating content, **Ektron CMS400.NET** places a cookie on the site visitor's computer.

So, whenever a page with a Content Rating server control is visited, **Ektron CMS400.NET** checks for the user ID or cookie. If neither exists, it displays a rating scale as displayed in ["Content Rating" on page 61](#). If the page has already been rated by the user, the following version of the control appears.




NOTE

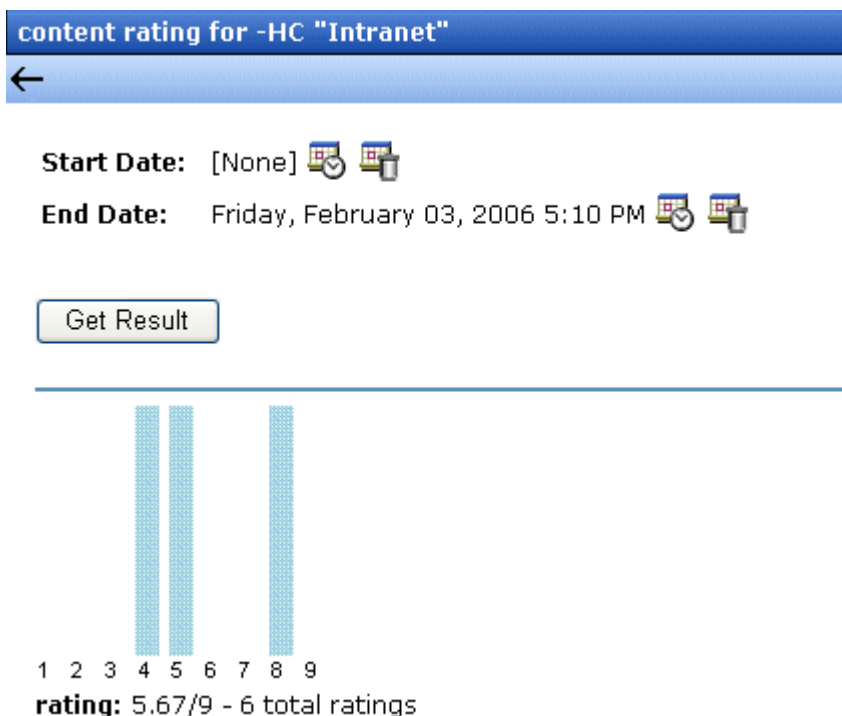
Your developer can customize many aspects of the control. So, it may not match the illustration.

Viewing the Content Rating Report

All Content Rating data for a content item is maintained and can be displayed in detail and summary format. To view this data, follow these steps.

1. Sign in to **Ektron CMS400.NET**.
2. Go to **Workarea > Content**.
3. Navigate to the folder that contains the content.
4. Navigate to the content item.
5. Click the View Rating Reports toolbar button (.

The Content Rating Report shows a summary of all ratings submitted for the content.



If desired, you can select a range of dates and limit the display of ratings data to those dates. Select start and end dates (using calendar buttons at the top of the screen) and click **Get Result**.

Viewing Content Rating Details

Also, to view details of the ratings data, click **Get Result** (see illustration below).

content rating for -HC "Intranet"

Start Date: [None]
End Date: Monday, February 06, 2006 12:05 PM

Get Result

rating 5.67/9 - 6 total ratings

UID	Date	Rating	Comments
admin	2/1/2006 11:26:16 AM	4	Wasn't really what I wanted.
	2/1/2006 11:26:55 AM	8	very helpful -- lots of good information
	2/1/2006 11:29:04 AM	5	Only fair -- didn't have all the info I was looking for
	2/1/2006 11:33:48 AM	5	Only fair -- didn't have all the info I was looking for
	2/3/2006 2:16:35 PM	4	very good

Export to Excel

Exporting Details to Excel

If Microsoft Excel is installed on your computer, you can export the ratings detail to Excel for further manipulation of the data. To do so, the **Click Export to Excel** button.

Content Reports

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

Adding Content Programmatically

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

Add Content Programmatically To CMS

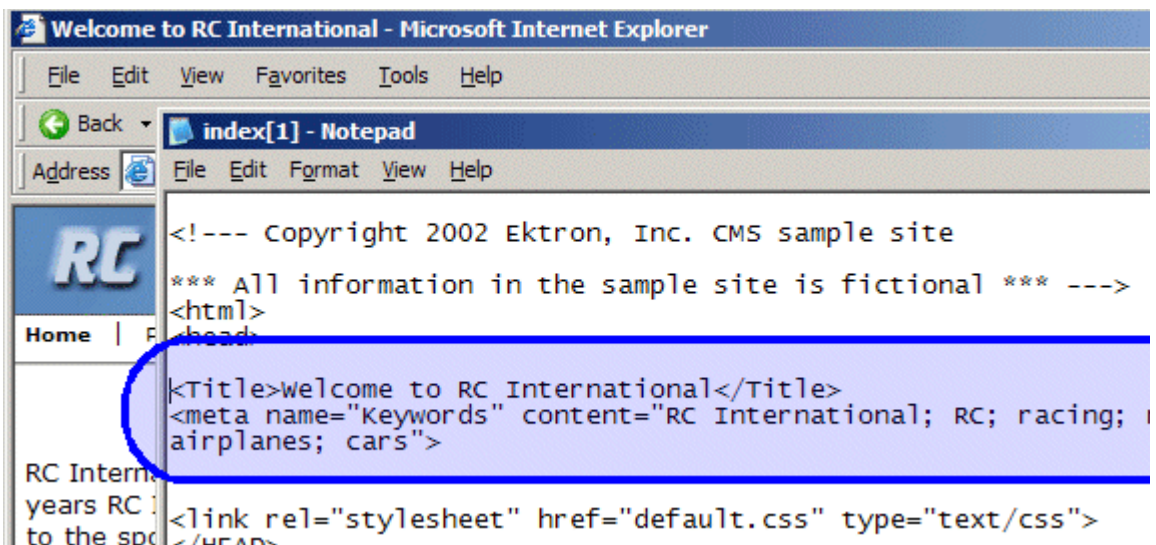
Username:	<input type="text" value="admin"/>	
Password:	<input type="text" value="admin"/>	
Domain:	<input type="text"/>	(when using Active Directory)
Title:	<input type="text" value="This is the content title"/>	(as text)
Comment:	<input type="text" value="This is the comment"/>	(as text)
Content:	<input type="text" value=" <p>This is the HTML content<p></p>"/>	
		(as HTML)
Summary:	<input type="text" value=" <p>This is the HTML summary<p></p>"/>	
		(as HTML)
Meta Data(Title):	<input type="text" value="Add content through asp example"/>	
		(as text)
Meta Data (Keywords):	<input type="text" value="add; content; asp; example"/>	
		(separated by semicolons)
Language:	<input type="text" value="1"/>	(1 for English, 1031 for German, 1036 for French)
FolderID:	<input type="text" value="0"/>	(numeric, 0 for root)
Start Date:	<input type="text"/>	(as mm-dd-yy)
End Date:	<input type="text"/>	(as mm-dd-yy)
<input type="button" value="Submit"/>		

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

Metadata

Two kinds of metadata can be added to **Ektron CMS400.NET** content

- Metadata that resides in the source code of a Web page. Examples include the title and meta tags. This data helps search engines find your Web page (illustrated below).



NOTE

To learn how to display on your Web site the metadata that resides in the source code, see the Ektron CMS400.NET Developer Manual section “Custom Functions (for your server platform)” > “Metadata Function”, “MetaData Server Control” and “MetaDataList Server Control.”

- Metadata that appears on your Web site’s search page, below the standard search fields.


This type of metadata, known as *searchable property*, helps site visitors find content on your Web site (illustrated below).

Search Text:

☒ All the words
☐ Any of the words
☐ Exact Phrase
☐ Match Partial Words

City of Origin:

- Any
- New York
- Montreal
- Hong Kong
- Sydney
- Paris
- Copenhagen

These search criteria also appear when a user clicks the search button () on the View Contents of Folder screen. See illustration below.

Search Content Folder

←

☒ Content ☒ Forms
☐ Include Archived

Search Text: Search

Title:

Comments:

Date Created: Between and

Date Modified: Between and

Language:

Last Editor's Last Name:

Status:

City of Origin:

Part Number:

In addition, Ektron CMS400.NET supports the Simple Dublin Core metadata standard. For more information, see ["Simple Dublin Core Metadata" on page 83](#).

If your site supports multiple languages, you create metadata definitions for each supported language.

NOTE Only members of the Administrator User Group and those defined in the Manage Members for Role: Metadata-Admin screen can view, add, or edit metadata definitions. See Also: ["Using the Roles Screens" on page 123](#)

These features are explained in more detail in the following sections.

- ["Adding a Metadata Definition" on page 71](#)
- ["Viewing Metadata Definitions" on page 78](#)

- "Editing a Metadata Definition" on page 78
- "Deleting a Metadata Definition" on page 79
- "Assigning Metadata to a Folder" on page 80
- "Adding Metadata to Content" on page 83
- "Simple Dublin Core Metadata" on page 83

Adding a Metadata Definition

Use the Add Metadata Properties screen to define metadata (such as keywords and title). You can define as many instances of metadata as you wish.

Add Meta Data definition

Name:

Type: Searchable Property ▼

Editable: ☒

Searchable Property

Publicly viewable: ☒

Style: Text ▼

Default:


current character count: 0 (500 max.)

To define one instance of metadata, follow these steps.

WARNING!

After creating a definition, you must assign it to all folders whose content should use it. You assign a metadata definition to a folder in the folder's properties. See "Assigning Metadata to a Folder" on page 80.

1. From the Workarea's left frame, click the **Settings** folder.
2. Click the **Configuration** folder to expand the tree.

3. Click the **Metadata Definition** folder.
4. The View Metadata Definitions screen appears.
5. Select the language for the metadata you are about to define. This metadata will only be available to content in this language.
6. Click the Add Metadata Definition button ().
7. The Add Metadata Definition screen appears. Using the following table, add the needed information.

Metadata Definition Fields

Field	Description
Name	Enter a name to identify this metadata.
Type	<p>From the drop-down list, select whether this tag is</p> <ul style="list-style-type: none"> a searchable property when inserted on the Web page - See <i>Also</i>: "Searchable Additional Fields" on page 73 an HTML tag (for example, <title>) - See <i>Also</i>: "HTML Tag Additional Field" on page 72 a Meta tag (<meta>) - See <i>Also</i>: "Meta Tag Additional Fields" on page 73
Editable	<p>Check this box if you want to allow users to edit the contents of the metadata when creating or editing the metadata's content.</p> <p>Uncheck this box if you want uniform metadata for each content item that uses this metadata.</p>

HTML Tag Additional Field

Field	Description
Default Text	<p>Enter default content for the HTML tag. For example:</p> <pre>content="document management web content management content management cms"</pre>

Meta Tag Additional Fields

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

Field	Description
Style	Select from the drop-down list to indicate whether you want the style to be name or http-equiv . For more information, see http://www.w3.org/TR/REC-html40/struct/global.html#h-7.4.4.2
Remove Duplicates	Check this box to remove duplicate words or phrases from the metadata.
Case Sensitive	Check this box to remove duplicates only if the letters and case of each letter match.
Separator	Enter a character to separate the metadata values. The default is a semicolon (;).
Selectable Metadata	Check this box to force users to select from the options specified in the Allow Selectable Text and Default Text fields. If you do not check this box, users can create their own metadata.
Allow Multiple Selections	Check this box to let users select multiple metadata values instead of one. If multiple values are allowed, use the separator character to delimit them. This field is only active if the Selectable Metadata box is checked.
Allow Selectable Text	Enter standard metadata that can be selected by users. Separate each option by the separator specified for the metadata definition. This field is only active if the Selectable Metadata box is checked.
Default Text	Enter default content for the metadata tag.

Searchable Additional Fields

For background information on Searchable Property type metadata, see "Metadata that appears on your Web site's search page, below the standard search fields." on page 68.

After creating a searchable metadata definition, assign it to folders whose content will use it. See Also: ["Assigning Metadata to a Folder" on page 80](#)

Field	Description
Publicly Viewable	<p>If you check the box, this search field appears on your Web site's search screen. Site visitors can use the field to find content on your Web site.</p> <p>Note: Regardless of whether this is checked, this search field appears on the Workarea's Search Content Folder screen to help Ektron CMS400.NET users find content. Only logged-in users can access the Workarea.</p>
Style	<p>Select the style of the response field from these choices (available in a dropdown list). You are specifying the <i>kind</i> of information that a user adding searchable properties to content will enter to describe the data. Later, anyone using the search can search on that information.</p> <p>See Also: "Assigning Metadata to a Folder" on page 80</p> <ul style="list-style-type: none"> • Text - The user enters free text to describe the content. • Number - The user enters a number to describe the content. • Date - The user enters a date to describe the content. • Yes or No - The user answers yes or no to describe the content. For example, if the content describes automobile parts, the user could answer yes to include new and used parts or no to search for new parts only. • Select from a list - The user picks a from a list to describe the content. For an illustration of this style on the Edit Content screen/Searchable Properties tab and the Site Search screen, see "Select from a List" on page 75. • Multiple selections - The user selects an item from a dropdown list. For an illustration of this style on the Edit Content screen/Searchable Properties tab and the Site Search screen, see "Multiple Selections" on page 75. <p>See Also: "Converting the Style of a Metadata Definition" on page 76</p>

Field	Description
Default	<p>If desired, enter the most common response to this definition.</p> <p>The default value is automatically applied to all existing content within folders to which this definition is assigned.</p> <p>While editing content that uses this definition, a user can accept the default value or change it.</p> <p>See Also: "Effect of a Default Value on Required Metadata" on page 82</p>

Select from a List

Appearance on Edit Content Screen > Metadata Tab

- Search Data -

City of origin: Paris

Editor's name:

Top Stories:

No Selection
New York
Montreal
Sydney
London
Paris

Appearance on Search Screen

☐ Match Partial Words

archive: Any

City of origin: Any

Editor's name: Any

Top Stories:

New York
Montreal
Sydney
London
Paris

Multiple Selections

Appearance on Edit Content Screen > Metadata Tab

Auto manufacturer:

Not Included:		Included:
Ford	>>	
Chevrolet	All >>	
Mazda	<<	
	All <<	

Appearance on Search Screen

archive: Any

Auto manufacturer: Ford

City of origin: Any

Editor's name: Ford

Top Stories: Chevrolet

Mazda

Converting the Style of a Metadata Definition

This section explains how **Ektron CMS400.NET** handles changing the style of a searchable property type of metadata. For example, you create a definition to collect **Part Number**. Originally, the style is text, but you later decide its style should be number.

When you change the style of searchable property type metadata, **Ektron CMS400.NET** attempts to maintain any data stored in content blocks that use the definition. For example, if the data style was number and you change it to text, the number stored for that metadata definition is converted to text and maintained in all content that uses it.

However, sometimes **Ektron CMS400.NET** cannot maintain the data when you change the style. For example, if you change a metadata definition style from number to date, **Ektron CMS400.NET** cannot convert those styles. In this case, any data stored in metadata definitions is lost.

The following table illustrates all conversion scenarios and how **Ektron CMS400.NET** handles each one. It indicates whether data is maintained after you convert from a data style in the left column to a style to its right.

	Text	Number	Date	Boolean	Single Select	Multiple Select
Text	-	OK	OK	NO	NO	NO
Number	OK	-	NO	NO	NO	NO
Date	OK	NO	-	NO	NO	NO
Boolean	OK	NO	NO	-	NO	NO
Single Select	OK	NO	NO	NO	-	OK
Multiple Select	OK	NO	NO	NO	NO	-

Table legend

- **OK** - Data is maintained
- **NO** - Data is lost during conversion

When you change the style of a metadata definition, the screen often gives you these choices:

- Use existing data if possible, else default
- Use default value

Searchable Property



Publicly viewable: ☒

Style: Date ▼

(Attention: Converting from text to date, Data may be lost, conversion may be irreversible without loss!)

☒ Use existing data if possible, else default

☐ Use default value

Default: [None]  

Following these choices is a field that lets you define a default value. If you want to simply replace any existing data, select **Use default value** and enter the new value in the **Default** field.

If the data is convertible (according to the table above), and you want to maintain existing data if possible, select **Use existing data if possible, else default**. Then, enter a default value below. If the existing data cannot be maintained, the default value replaces it.

Viewing Metadata Definitions



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

1. Navigate to the Metadata Definitions screen in the administrator Workarea, as described in ["Adding a Metadata Definition" on page 71](#).
2. Select a language from the drop-down list.
3. Click the Metadata definition you want to view.
4. The View Metadata Definition screen appears. From here, you can edit and delete this definition.

See Also: ["Metadata Definition Fields" on page 72](#)

Editing a Metadata Definition

To edit a metadata definition, follow these steps.

1. Access the View Metadata Definition screen whose definition you want to edit, as described in "[Viewing Metadata Definitions](#)" on page 78.
2. Click the Edit button ().
3. The Edit Metadata Definition screen is displayed.
4. Make the necessary changes to the definition.
See Also: "[Metadata Definition Fields](#)" on page 72
5. Click the Update button (.

What Happens When a Metadata Definition is Edited?

If you create a metadata definition, assign it to a folder, then users insert metadata information into their content, the collected information takes on the characteristics of the metadata definition. For example, if the metadata is **title** and its type is **HTML tag**, this is how it appears in the Web page's source code.

```
<title>CMS Developer</title>
```


If you later change its type to **Meta**, the following effects occur:

- metadata to which the definition has *already been assigned* maintains the previous style definition. For example, `<title>CMS Developer</title>`.
- when you create a *new* content item that uses the metadata definition, its metadata takes on the new style. For example, `<meta name="title" content="CMS developer">`.

Deleting a Metadata Definition

You can remove metadata definitions that are no longer used from the Ektron CMS400.NET site. When you delete a definition, it is removed from every content item that uses it.

To delete a definition, follow these steps.

1. Access the View Metadata Definition screen for the definition, as described in "[Viewing Metadata Definitions](#)" on page 78.
2. Click the Delete button (.

3. A confirmation message is displayed.
4. Click **OK**.
5. Another confirmation message is displayed.
6. Click **OK**.

Assigning Metadata to a Folder

After creating a searchable metadata definition (see ["Adding a Metadata Definition" on page 71](#)), assign it to folders whose content will use it.

On each folder's properties screen, you determine which metadata definitions can be used. It may be some, all, or none of the metadata definitions set up in the Metadata Definitions screen.

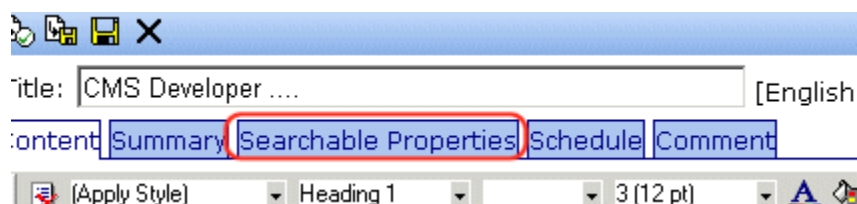
The section of the folder properties screen used to assign metadata appears below. Only metadata definitions whose **Assigned** box is checked can be completed by users working with content in the folder.

Metadata/Custom-Fields available for folder 'Content':

Assigned	Required	Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	title
<input checked="" type="checkbox"/>	<input type="checkbox"/>	keywords
<input checked="" type="checkbox"/>	<input type="checkbox"/>	description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	page
<input checked="" type="checkbox"/>	<input type="checkbox"/>	robots
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Part number

See Also: ["Metadata" on page 68](#)

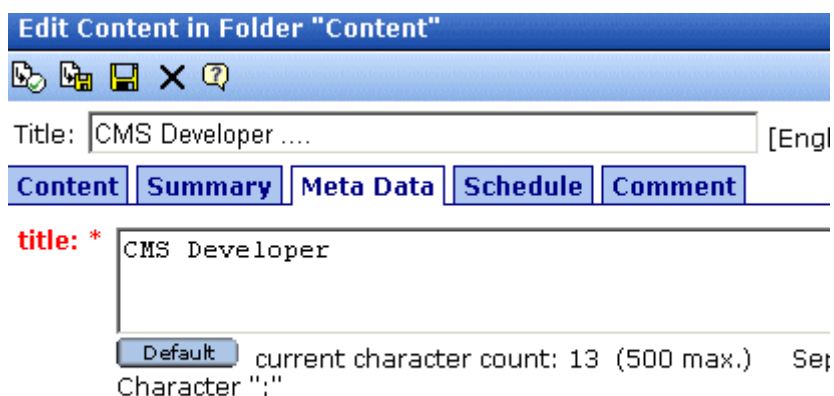
Then, while creating or updating content, the user can insert the metadata information via the Metadata tab (illustrated below). The user can only enter metadata values for the types of metadata assigned to the content's folder.



Requiring Users to Enter Metadata

You can determine that any metadata definition *must* be completed for content before it can be saved (see the **Required** checkboxes in the illustration above). This occurs both when new content is added and existing content is edited.

If you set a kind of metadata to be required, its label is red and includes an asterisk (*) on the Metadata tab of the Edit Content screen, as shown below.



*** = Required fields**

If the user does not complete a required metadata field, a message informs him that the information must be entered before he can save the content.

Effect of a Default Value on Required Metadata

A default value can be defined when creating or editing a metadata definition. See Also: ["Adding a Metadata Definition" on page 71](#)

If a default value is defined for a required metadata field, the default value is used when the user saves the content. In this case, the user is not prompted to enter a value because the default value is sufficient.

Inheritance of Metadata by Folder

Each folder can inherit metadata fields from its parent folder or have a unique set of them. The information includes not only which kinds of metadata are *assigned* but also which ones are *required*. For example, you could assign the top folder (Content) all metadata definitions, while you assign the Contacts folder (directly below it) none.

On every folder's properties screen, use the **Break Inheritance** check box (illustrated below) to determine if metadata definitions are the same as the parent folder or unique.

Metadata/Custom-Fields available for folder 'Contacts':
(Inherited from folder 'Content')

☐ Break Inheritance

Assigned	Required	Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	title
<input checked="" type="checkbox"/>	<input type="checkbox"/>	keywords
<input checked="" type="checkbox"/>	<input type="checkbox"/>	description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	page
<input checked="" type="checkbox"/>	<input type="checkbox"/>	robots

By default, **Break Inheritance** is not checked, which means that all folders inherit metadata definitions from the root folder (Content).

When you click the **Break Inheritance** check box, all inherited values appear by default (that is, **Assigned** and **Required** boxes are either checked or unchecked). You can then change which boxes are checked/unchecked as desired.

Adding Metadata to Content

When a user creates or updates content, he can define its metadata within the assignments specified for the folder.

Default metadata are applied without user intervention. Instructions for adding metadata are found in the Adding or Editing Data Metadata section of the **Ektron CMS400.NET** User Manual.

Simple Dublin Core Metadata

Simple Dublin Core is a set of fifteen standard names for metadata fields designed to cover the most useful items of information on a document. From the Dublin Core site FAQ: "Dublin Core metadata provides card catalog-like definitions for defining the properties of objects for Web-based resource discovery systems." For more information, refer to the Usage Guide: <http://www.dublincore.org/documents/usageguide/>.

By using the Metadata Server Control, you automatically create seven of the fifteen Dublin Core metadata fields. These fields are automatically filled with the information from the equivalent Ektron CMS400.NET property. Below is a list of the seven fields and their Ektron CMS400.NET equivalent. For more information on the Metadata Server Control, see the Developer's Manual section "Introduction to Ektron CMS400.NET Server Controls" > "MetaData Server Control"

Dublin Core Field Name	Ektron CMS400.NET Property
DC.title	Content block title
DC.description	Plain text version of a content block teaser (summary)
DC.contributor	Content block last editor name
DC.date	Content block last edit date
DC.format	"text/html"

Dublin Core Field Name	Ektron CMS400.NET Property
DC.identifier	URL of current page (from ASP.NET Server.Request object)
DC.language	CMS language cookie / current site language, expressed as a .NET System.Globalization Culture Name

Creating the Additional Eight Fields

To fully comply with the Simple Dublin Core metadata element set, the administrator must create the remaining eight Dublin Core fields as standard CMS400.NET Metadata definitions and apply them to all CMS400.NET folders. Next, CMS users complete the appropriate values for each content block.

WARNING!

When creating the Dublin Core metadata fields in the Metadata section of the Workarea, you do not need to create the first seven fields in the table above. In addition, the names of the fields you create must match the names below. For example, in the name field, enter "DC.subject". The DC identifies the metadata as Dublin Core metadata.

The remaining eight Simple Dublin Core fields are described below:

NOTE

These descriptions are from the Dublin Core Metadata Initiative site. For a more detailed description, visit <http://www.dublincore.org>.

- **DC.subject** - The topic of the content of the resource. Typically, a Subject is expressed as keywords, key phrases, or classification codes that describe the topic of the resource.
- **DC.type** - The nature or genre of the content of the resource. Type includes terms describing general categories, functions, genres, or aggregation levels for content.
- **DC.source** - A reference to a resource from which the present resource is derived. For example, DC.source="Image from page 54 of the 1922 edition of Romeo and Juliet"
- **DC.relation** - A reference to a related resource.
- **DC.coverage** - The extent or scope of the content of the resource. Coverage typically includes spatial location (a place name or geographic co-ordinates), temporal period (a period

label, date, or date range) or jurisdiction (such as a named administrative entity). Examples: DC.coverage="1995-1996", DC.coverage="Boston, MA", DC.coverage="17th century" or DC.coverage="Upstate New York".

- **DC.creator** - An entity primarily responsible for making the content of the resource.
- **DC.publisher** - The entity responsible for making the resource available.
- **DC.rights** - Information about rights held in and over the resource. Typically, a Rights element contains a rights management statement for the resource, or reference a service providing such information.

To learn about adding Metadata definitions, see ["Adding a Metadata Definition" on page 71](#).

Setting Permissions

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

You can set permissions for a content folder or content item. If you assign permission to a content folder, it affects all of its subfolders unless you break inheritance for a subfolder.

Who Is Authorized to Set Permissions

Only Ektron CMS400.NET administrators and users identified on the Manage Members for Role: Folder User Admin screen can set permissions. See *Also: "Using the Roles Screens" on page 123*

Setting Permissions through the Permissions Table

IMPORTANT!


All members of the Administrator group are automatically granted all permissions to all Ektron CMS400.NET folders. Although these users do not appear when you view a folder's permission table, they have full permissions.

You manage the following permissions through the Permission Table (illustrated below).




- Content management: view, add, edit, delete, restore
- Library File Management: view, add images, add other types of files, add hyperlinks, overwrite files
- Folder management: add, edit, delete, traverse
- Work with Collections

NOTE

You can use the Roles screens to assign additional permissions that are not defined in the Permission Table, such as the ability to create tasks. *See Also:* "Defining Roles" on page 123

The Permission Table appears when you click the Permission button () from the folder's or content's Properties window.





View Permissions for Folder "abc"

☐ Allow this object to inherit permissions.

☐ The content in this folder is private and is NOT viewable on the public Web site.

[View Advanced Permissions](#) [View MemberShip us](#)

User or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images	Add Files	Add Hyperlinks	Overw Librai
 <u>admin</u>	x	x	x	x	x	x	x	x	x	x
 <u>jedit</u>	x	x	x							
 <u>Administrators</u>	x	x	x	x	x	x	x	x	x	x
 <u>Everyone</u>	x									

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

- "Inheritance" on page 87
- "Standard & Advanced Permissions" on page 88
- "Setting Permissions for a Content Folder" on page 90
- "Setting Permissions for Content" on page 93

Inheritance

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

- Modify the permissions of the parent folder - see "Setting Permissions for a Content Folder" on page 90

- Break inheritance and add permissions to a folder

Breaking Inheritance

To break inheritance from a parent folder, follow these steps.

1. Access the Permissions Table for a content folder or content in your Workarea, as described in "[Accessing the Permissions Table](#)" on page 90.
2. Remove the check mark from the box that says **Allow this object to inherit permissions**.
3. A confirmation message appears.
4. Click **OK**.

Restoring Inheritance

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

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

Standard & Advanced Permissions

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

- Standard Permissions - basic functions
- Advanced Permissions - administrator level functions

The following table explains the permissions in Ektron CMS400.NET.

Category	Permission	Allows user/user group to perform this action on content in selected folder
Standard	Read Only	View content
	Edit	Edit content
	Add	Add content
	Delete	Delete content
	Restore	Restore old versions of content
	Library Read Only	View items in the corresponding library folder See Also: "Managing Library Items" on page 103
	Add Images	Upload images to the corresponding library folder
	Add Files	Upload files to the corresponding library folder
	Add Hyperlinks	Add hyperlinks to the corresponding library folder
	Overwrite Library	Overwrite images and files the corresponding library folder
Advanced	Collections	Manage collections See Also: "Collections" on page 402
	Add Folders	Add sub folders
	Edit Folders	Edit folder properties See Also: "Folder Properties" on page 38
	Delete Folders	Delete the current folder or its subfolders
	Traverse Folders	View the subfolders under the main content folder. By default, the everyone user group has permission to view all subfolders.
	Modify Preapproval	Set or update a folder's preapproval group. See Also: "Automatic Creation of Tasks Associated with Content" on page 383

Setting Permissions for a Content Folder



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






[Accessing a Folder's Permissions Table](#)

Accessing the Permissions Table

To access the Permissions Table, follow these steps.

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





View Permissions for Folder "abc"

☐ Allow this object to inherit permissions.

☐ The content in this folder is private and is NOT viewable on the public Web site.

[View Advanced Permissions](#) [View MemberShip](#)



User or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read Only	Add Images	Add Files	Add Hyperlinks	Over Libr
 admin	x	x	x	x	x	x	x	x	x	>
 jedit	x	x	x							
 Administrators	x	x	x	x	x	x	x	x	x	>
 Everyone	x									

The Permissions Table displays each user's abilities to perform actions on content within the selected folder. Since all permissions cannot fit on one screen, you can click **View Advanced Permissions** to see the other group.

After viewing the permissions, you can change them. Below is a list of actions you can perform from this screen.

Actions You Can Perform from the Permissions Table

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

Action	How to perform it	For more information, see
View advanced permissions	Click <u>View Advanced Permissions</u>	"Standard & Advanced Permissions" on page 88
Add user or group to permission table	Click 	"Adding a User or User Group to the Permissions Table" on page 92
Remove user or group from permission table	Click 	"Deleting Users or User Groups from the Permissions Table" on page 93
View membership users	Click <u>View MemberShip users</u>	"Private Content & Memberships" on page 129
Have this folder inherit permissions from parent folder	Check box next to Allow this object to inherit permissions	"Inheritance" on page 87
Make content in this folder private	Check box next to The content in this folder is private and can only be viewed by authorized users and members <u>Note: If Allow this object to inherit permissions is checked, you cannot check this box. In that case, this folder is inheriting this setting from its parent folder.</u>	"Private Content" on page 129


Adding a User or User Group to the Permissions Table

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

NOTE Before adding users or groups, you must break inheritance. See ["Inheritance" on page 87](#).

NOTE If a user and the user group to which that user belongs are both given permission to a folder, the user has all permissions to which he/she is assigned as well as permissions assigned to the user group.

NOTE You can only assign Read Only permission to a Membership user or user group. See Also: ["Private Content & Memberships" on page 129](#)

1. Access the Permissions Table for the content folder or content, as described in ["Accessing the Permissions Table" on page 90](#).
2. Click the Add button ().
3. The Add Permissions screen appears. Only users and groups not assigned to the Permissions Table appear.
4. Click a user or group to add to the Permissions Table.
5. The Add Permissions screen appears.
6. Check the standard and advanced permissions for the user or group. Refer to ["Standard & Advanced Permissions" on page 88](#) for a description of permission options.

NOTE Check [Enable All](#) to assign all standard permissions. If you do, you still must assign advanced permissions by hand.

7. Click the Save button ().

Editing User or User Group Permissions

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

1. Access the Permissions Table for the content folder or content, as described in ["Accessing the Permissions Table" on page 90](#).
2. Click the user or group for which you want to edit permissions.


3. The Edit Permissions screen appears.
4. To assign any permission, check the box. To remove any permission, uncheck the box.

NOTE Remember to toggle between standard and advanced permissions.

5. Click the Update button ()

Deleting Users or User Groups from the Permissions Table


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

1. Access the Permissions Table for the content folder or content, as described in ["Accessing the Permissions Table" on page 90](#).
2. Click the Delete button (.
3. The Remove Permissions screen appears.
4. Click the user or group to remove from the Permissions Table.
5. A confirmation message appears.
6. Click the **OK** button.

NOTE When you delete the permissions of a user or user group, that change is propagated to all subfolders and content. Also, if the user or group was part of an approval chain, they are removed from it.

Setting Permissions for Content

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

1. Access the content by navigating to its folder, selecting a language, and clicking on it.
2. Click the View Permissions button (.
3. Uncheck the box next to **Allow this object to inherit permissions**.

4. A confirmation message appears. Press **OK**.
5. You can perform any action on the content that you can perform on a folder. These options are described in "[Actions You Can Perform from the Permissions Table](#)" on page 91.

Setting Approval Chains

What is an Approval Chain?

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

Also, if a user deletes content, before it can be removed from **Ektron CMS400.NET**, everyone in the approval chain must approve the deletion.

An approval chain can include any number of users or user groups. However, to be eligible, a user or user group *must* have permissions to the content folder or content item. See *Also*: ["Setting Permissions" on page 86](#)

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

You can set up an approval chain for a content folder or a content item as well as a language. See *Also*: ["Multi-Language Approval Chains" on page 464](#)

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

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

- ["Examples of Approval Chains" on page 96](#)
- ["Inheritance and the Approval Chain" on page 96](#)
- ["Creating an Approval Chain for a Content Folder" on page 96](#)
- ["Editing an Approval Chain For Content" on page 100](#)

- ["The Approval Method" on page 101](#)

NOTE

Only Ektron CMS400.NET administrators and users identified on the Manage Members for Role: Folder User Admin screen can modify the approval chain.

Examples of Approval Chains

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

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

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

Inheritance and the Approval Chain

By default, every content folder and item inherits the approval chain from its parent folder. To modify an approval chain, either modify the parent's approval chain or break inheritance. This procedure is described in ["Inheritance" on page 87](#).



Creating an Approval Chain for a Content Folder

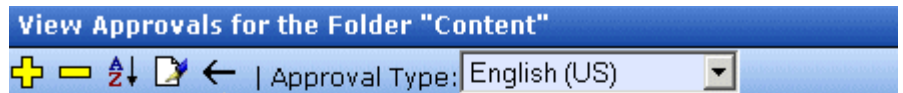
Before you can edit an approval chain, you first have to view it.

Viewing a Folder's Approval Chain

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

1. Select a folder from the left frame of the Workarea.
2. Using the **View** field and languages drop-down list, select the language of the approval chain you want to view.

3. Click the Properties button (.
4. Click the Approvals button (.
5. The approval chain appears in the lower section of the screen.



Approval Method:

Force All Approvers




User or Group Name	ID	Approval Order
 jedit	2	1


This screen shows the following information about the approval chain.

- its language
- every user and user group in the approval chain
- the approval order
- the approval method (See also: ["Changing the Approval Method" on page 102](#))
- toolbar buttons for modifying the approval chain and method

Actions You can Perform from the Approvals Screen


From this screen, you can perform these actions.

Action	Button	See this section for details
Add approvers		"Adding Approvers" on page 98
Remove approvers		"Deleting Approvers" on page 100
Change the order of users in the approval chain		"Editing the Approval Order" on page 98

Action	Button	See this section for details
Change the approval method		"Changing the Approval Method" on page 102
Change the language of the approval chain	Approval Type (language)	"Multi-Language Approval Chains" on page 464

Adding Approvers

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

1. Access the approval table, as described in ["Viewing a Folder's Approval Chain" on page 96](#).
2. Select the language of the approval chain. The chain only applies to content in this language.
3. Click the Add button ().
4. The Add Approvals screen appears.

NOTE [Only users and user groups with permissions to the folder appear. See "Adding a User or User Group to the Permissions Table" on page 92 for more information.](#)

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

NOTE [If you assign a user group to an approval chain, only one member of the group needs to approve the content, not all members.](#)


Editing the Approval Order

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

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

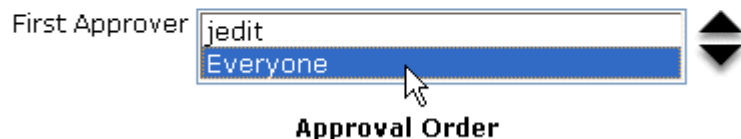
User or Group Name	Approval Order
Content contributor	1
Department Head	2
Webmaster	3




To edit the approval order, follow these steps.

1. Access the approval table as described in ["Viewing a Folder's Approval Chain" on page 96](#).
2. Select the language.
3. Click the Reorder button ().
4. The Edit Approval Order screen appears.
5. Click the user or group whose approval order you want to change.



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




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


Deleting Approvers

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

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



1. Access the approval table as described in "[Viewing a Folder's Approval Chain](#)" on page 96.
2. Select the language.
3. Click the Remove button ().
4. The Remove Approval screen appears.
5. Click the user or group that you want to remove from the approval chain.
6. A confirmation message appears.
7. Click **OK**.

Editing an Approval Chain For Content

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


Viewing an Approval Chain for Content

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


1. Select the content.
2. Click the View Permissions button ().
3. Uncheck the checkbox next to **Allow this object to inherit permissions**.
4. Return to the View Content screen.
5. Click the Approvals button ().

6. The content's approvals table appears.

View Approvals for the Folder "Content"


 | Approval Type: English (US)

Approval Method:
Force All Approvers

User or Group Name	ID	Approval
 jedit	2	

After viewing the content's approval chain, you can perform the same actions on it as you can perform on a folder. This list of actions is available from ["Actions You can Perform from the Approvals Screen"](#) on page 97.

The Approval Method

The Approval Method determines if content must be approved by all users in the chain, or only users higher up in the chain than the user making the edits. The approval method only affects the approval process if the person submitting content for publishing is a member of the approval chain.

Two approval methods are available.

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

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



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

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

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

Changing the Approval Method

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

1. Access the approval table, as described in "[Viewing a Folder's Approval Chain](#)" on page 96.
2. Click the Edit button ().
3. The Edit Approval Method screen appears.
4. Select an approval method by clicking the radio button.
5. Click the Save button (.

Managing Library Items

Before users can insert images and files into their content, they must be uploaded to the server that contains **Ektron CMS400.NET**. Each user, depending on their permissions, can upload images and files through the library in their Workarea.

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

What's In This Chapter?

This chapter assumes you are familiar with the Library Folder chapter of the **Ektron CMS400.NET** User Manual. As a result, the chapter only provides information that is unique to administrators.

The following topics are covered in this chapter:

- ["Library Folders and Permissions" on page 103](#)
- ["Folder Properties" on page 104](#)
- ["Performing Actions on Library Items" on page 107](#)
- ["Load Balancing" on page 108](#)
- ["If You Have an Ektron WebImageFX License Key..." on page 111](#)

Library Folders and Permissions

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




Items added to library folders are only accessible by users with permission to the corresponding content folder. If items are added to a library folders directly under the main library folder, all users with at least library Read-Only permissions can use those library items in their content.

Conversely, if a library item is uploaded to a folder to which only one person has permissions, that is the only user who can use that library asset.

Folder Properties


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

The following buttons indicate actions you can perform on a library folder.

Button	Description	For more information, see
	Folder properties	"Accessing the Library Properties Screen" on page 104
	Search	Ektron CMS400.NET User Manual section "Library Folder" > "Searching the Library"
	Back to previous screen	

Accessing the Library Properties Screen

As an administrator, you have permission to change the library properties. To view the properties of the library folder, follow these steps.


1. Access a library folder, as explained in ["Folder Properties" on page 104](#).
2. Click the Properties button (.
3. The Library Management window appears, displaying the following settings.

The Library Management Settings

Field	Description
Image Extensions	The types of image files that a content contributor can upload to the library. You can add as many image file extensions as you want, or have none. If no extensions appear, no one can upload image files to the specified folder.
Image Upload Directory	<p>Specifies where the uploaded images are saved on the Web server. By default, the image upload directory is <code>Web root/ek_sitepath/uploadedimages</code>. The <code>ek_sitepath</code> value is set in the <code>Web.config</code> file.</p> <p>Note: You must create the directory in your Web root manually, before adding it in CMS400.NET.</p> <p>See Also: Ektron CMS400.NET Setup Manual section “Managing the <code>web.config</code> File.”</p>
Physical Path	Path to file upload folder.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.
File Extensions	Specify the types of non-image files that a content contributor can upload to the library. You can add as many non-image file extensions as you want, or have none. If no extensions appear, no one can upload non-image files to the specified folder.
File Upload Directory	<p>Specifies where the uploaded files are saved on the Web server. By default, the file upload directory is <code>Web root/ek_sitepath/uploadedfiles</code>. The <code>ek_sitepath</code> value is set in the <code>Web.config</code> file.</p> <p>Note: You must create the directory in your Web root manually, before adding it in CMS400.NET.</p> <p>Ektron CMS400.NET Setup Manual section “Managing the <code>web.config</code> File.”</p>
Physical Path	Path to file upload folder.
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.

Editing Library Properties

To edit library properties, follow these steps.

1. Go to the Library Properties screen, as explained in ["Accessing the Library Properties Screen" on page 104](#).
2. Click the Edit button (.























Library properties are described in the table below.

Field	Description
Image Extensions	The types of image files that a content contributor can upload to the library. You can add as many image file extensions as you want, or have none. If no extensions appear, no one can upload image files to the specified folder.
Image Upload Directory	<p>Specifies where the uploaded images are saved on the Web server. By default, the image upload directory is <code>Web root/ek_sitepath/uploadedimages</code>. The <code>ek_sitepath</code> value is set in the Web.config file.</p> <p>Note: You must create the directory in your Web root manually, before adding it in CMS400.NET.</p> <p>Ektron CMS400.NET Setup Manual section "Managing the web.config File."</p>
Make Directory Relative to this Web site	If you want to specify the image upload directory's location as relative to your Web site root, check this box. (Your Web site root's location appears to the right of Make Directory Relative to this Web site .)
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.
File Extensions	Specify the types of non-image files that a content contributor can upload to the library. You can add as many non-image file extensions as you want, or have none. If no extensions appear, no one can upload non-image files to the specified folder.

Field	Description
File Upload Directory	<p>Specifies where the uploaded files are saved on the Web server. By default, the file upload directory is <code>Web root/ek_sitepath/uploadedfiles</code>. The <code>ek_sitepath</code> value is set in the <code>Web.config</code> file.</p> <p><u>Note: You must create the directory in your Web root manually, before adding it in CMS400.NET.</u></p> <p>Ektron CMS400.NET Setup Manual section "Managing the web.config File."</p>
Make Directory Relative to this Web site	If you want to specify the file upload directory's location as relative to your Web site root, check this box. (Your Web site root's location appears to the right of Make Directory Relative to this Web site.)
Verified	A green check notifies you that the physical location exists. A red X means that the location does not exist, and you need to set up that folder on the file server.

Performing Actions on Library Items

The library is made up of images, files, form Quicklinks, hyperlinks, and regular Quicklinks that were added by Ektron CMS400.NET users. The following table displays the actions that can be performed for each library item type.

Action	Files	Images	Hyperlinks	Quicklinks	Form Quicklinks
Add					
Edit					
View					
Overwrite					
Delete					

Action	Files	Images	Hyperlinks	Quicklinks	Form Quicklinks
Remove from server	✓	✓			
Check links	✓	✓	✓	✓	✓
Update URL			✓	✓	✓

Most actions can be performed by a user who is granted permission to do so. See Also: ["Setting Permissions" on page 86](#)

Load Balancing

This section explains how to create load balancing paths in Ektron CMS400.NET. For further information about the steps needed to set up load balancing outside of Ektron CMS400.NET, see ["Load Balancing" on page 579](#).

Load Balancing and Ektron CMS400.NET

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



Ektron CMS400.NET provides to any administrator an interface for adding load balance folders to the application. These folders needs to be either a virtual or physical folder under the Ektron CMS400.NET Web site. In most cases, this is a virtual folder that points to a mounted hard drive (another server).

NOTE

See ["Configuring Load Balancing without Site Replication" on page 581](#) for more information about this feature.

Accessing Library Load Balancing Screen

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


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

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



Column Title	Description
Web Path	The path of the folder under your server's Web site.
Type	<ul style="list-style-type: none"> • Images - load balance folder for uploaded images. • Files - load balance folder for uploaded files.
Relative	An x indicates if the folder is relative to your Ektron CMS400.NET Web site.
Verified	If the load balance folder exists in the proper location, a green check is used to verify that the folder exists. A red x is displayed when the folder does not exist in the specified location.
Physical Path	The physical location of the folder to which items will be uploaded.

Adding a New Load Balancing Folder

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

1. Access the view load balance settings screen, as described in ["Accessing Library Load Balancing Screen" on page 109](#).
2. Click the Add button () on View Library Load Balance Settings screen.
3. The Add a Library Load Balancing Path screen is displayed.

Add a Library Load Balance Path

☒ **Images:** This path is for image assets.

☐ **Files:** This path is for file assets.

Load Balance Path:

☒ Make Directory Relative to this Web site: /CMSSample/

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

Field	Description
Images/Files	Specify if the load balance path folder will be for images or files.
Load Balance Path	Enter the path of the folder.
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS400.NET site root, check off the box to make the path relative to that. Otherwise, remove the check.

5. Click the Save button ().

Editing a Library Load Balance Path

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

To edit a load balance path, follow these steps.



1. Access the View Library Load Balance Settings screen, as described in ["Accessing Library Load Balancing Screen" on page 109](#).
2. Click the Web Path of the load balance path you want to edit.
3. The Edit Library Load Balancing Path is displayed.
4. Make the necessary changes to the load balance path.

5. Click the Update button ().

Deleting a Library Load Balance Path

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

To delete a library load balance path, follow these steps.

1. Access the View Library Load Balance Settings screen, as described in ["Accessing Library Load Balancing Screen" on page 109](#).
2. Click the Remove () button.
3. The Remove Library Load Balance Path is displayed.
4. Check off the box(es) of the load balance paths you want to delete.
5. Click the Remove button () to delete the load balance path.
A confirmation message is displayed.
6. Click **OK**.


If You Have an Ektron WebImageFX License Key...

If you purchased and inserted an Ektron WebImageFX license key into Ektron CMS400.NET, the images folder is enhanced automatically.


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

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

Library Folder: "Content\images"



Title	ID	Date Modified	Filename
RedStar Airplane -- smaller version 2	05-Sep-2002 05:46 PM	/CMS300Sample/uploaded	



NOTE

For information about acquiring an Ektron WebImageFX license key for Ektron CMS400.NET, contact the [Ektron Sales Department](#).

Managing Users & User Groups

Users are people who administer the Web site, create content, or publish content. Without users, the Web site would be blank. In Ektron CMS400.NET, you can add, edit, and delete users to and from the application through the Settings folder in the Workarea.

Every Ektron CMS400.NET user belongs to a User Group. User groups are used when creating permissions and approvals for content folders. User groups can be departments in your company (Human Resources, Sales, Engineering) or indicate a user's role (Publishers, Administrators, Editors, etc.).

IMPORTANT!

If your system uses the Active Directory Integration Feature, proceed to ["Active Directory Feature"](#) on page 630 to learn about user management functions. This chapter only applies to systems that do not use Active Directory Integration.

IMPORTANT!

If your system uses LDAP Authentication, proceed to ["LDAP Authentication"](#) on page 679. Some functionality in this chapter does apply to LDAP. The LDAP chapter explains which information is applied.

This section explains the most common actions that you will perform on users and user groups. These actions include:

- ["Accessing the Users and User Groups Folders"](#) on page 114
- ["Creating a New User"](#) on page 114
- ["Viewing a User"](#) on page 117
- ["Editing a User"](#) on page 117
- ["Deleting a User"](#) on page 118
- ["Assigning Users To User Groups"](#) on page 120

NOTE

Only members of the Administrator User Group and those defined in the Manage Members for Role: User Admin screen can view, add, or edit users and user groups.

Accessing the Users and User Groups Folders

All user and user group information is accessible from the Workarea.

Accessing the User Folder

To access the user folder in Ektron CMS400.NET, follow these steps.

1. Access the Workarea.
2. Click the **Settings** button in the lower left frame.
3. Click the **Users** folder from the folder tree.
4. A table of all Ektron CMS400.NET users is displayed.

From this screen, you can add, edit, and delete users. These procedures are explained in the next sections.

Accessing the User Group Folder

To access the user group folder in Ektron CMS400.NET, follow these steps.


1. Access the Workarea.
2. Click the **Settings** folder from the left frame of the Workarea window.
3. Click the **User Group** folder.
4. A list of all user groups is displayed.

From this screen, you can add, edit, and delete user groups. These procedures are explained in the next sections.

Managing Users

Creating a New User


Before you can assign a user to a user group, you must add the user to the system. To create a new user, follow these steps.

1. Access the User folder, as described in ["Accessing the User Folder" on page 114](#).
2. Click the Add User button ().
3. The Add a New User to the System screen appears.
4. Enter the following information about the user.

Field	Description
Username	Insert a username for the user you want to create.
Organization Organizational Unit Domain	These fields are only available when using LDAP Authentication. See Also: "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 683 .
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Password	Confirm the password by typing it again.

Field	Description
User Language	<p>Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within Ektron CMS400.NET.</p> <p>The dropdown list of choices at this field is derived from the Language Settings screen, available from the Settings> Configuration folder.</p> <p>Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content.</p> <p>See Also: "Multi-Language Support" on page 442</p> <p><u>Note: If the selected language is not English, French or German, it is only supported after you download the Ektron CMS400.NET Language Support Program from Ektron and translate the Web site.</u></p>
Email Address	Enter the email address of the user.
Disable Email Notification	<p>Select to disable the email notifications for the user. If you do, the user will not receive the automatic email notification described in "Automatic eMail Notification" on page 624. However, this field has no effect on the user's ability to receive instant email.</p>
Work Page Size	See "Work Page Size" on page 27
Landing Page after login	See "Landing Page after login" on page 28
Any custom user properties	See "Custom User Properties" on page 142

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

5. Click the Save button ().
6. The View Users in Group Everyone screen appears with the new user included in the table.

NOTE When you add a new user, he is automatically placed in the Everyone user group. To assign users to other groups, see ["Assigning Users To User Groups" on page 120.](#)

7. Continue this process until you add all users of your Web site, or are allowed to depending on your license.

NOTE Contact Ektron Sales for pricing of adding more users to your license.

Viewing a User

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

To view a user, follow these steps.

1. Access the user folder as described in ["Accessing the User Folder" on page 114.](#)
2. Click the **Username** of the user you want to view.
3. The View User Information screen is displayed.
To learn about the fields, see ["Enter the following information about the user." on page 115](#) and ["The following fields are only available when editing a user." on page 118](#)

From the View User screen, you can edit or delete users. These actions are described in the next sections.

Editing a User


IMPORTANT! If you are using Active Directory to edit a user, see ["Editing User Information in Ektron CMS400.NET" on page 646.](#)

When editing a user, you can change the username, first name, last name, password, user language, and email address. Also, while editing, you can change three fields that were not available when the user was created.

- Account Locked
- Work Page Size


- Landing Page after login

To edit a user, follow these steps.

1. Access the view user screen of the user you want to edit as described in ["Viewing a User" on page 117](#).
2. Click the **Username** of the user you want to edit.
3. The View User Information screen is displayed.
4. Click the Edit button ().
5. The Edit User screen is displayed. To learn about the fields, see ["Enter the following information about the user." on page 115](#).

The following fields are only available when editing a user.

Field	Description
Account Locked	See "Restricting Login Attempts" on page 6
Work Page Size	See "Work Page Size" on page 27
Landing Page after login	See "Landing Page after login" on page 28

6. Make the necessary changes to the user information.
7. Click the Update button ().

Deleting a User

IMPORTANT!


If you are using Active Directory to delete a user, see ["Deleting Users" on page 646](#).

When you need to remove a user from the application, you can easily do it from the User's Folder in the Workarea.

WARNING!

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

To delete a user, follow these steps.


1. Access the view user screen for the user you want to delete, as described in ["Viewing a User" on page 117](#).
2. Click the **Username** of the user you want to delete.
3. The View User Information screen is displayed.
4. Click the Delete button ()
5. A confirmation message is displayed.
6. Click **OK**.

Removing Users from User Groups

NOTE

Removing a user from a user group does not delete the user from Ektron CMS400.NET. Also, you cannot remove users from the Everyone or Admin user groups.



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

1. Access the User Groups folder, as described in ["Accessing the User Group Folder" on page 114](#).
2. Click the User Group that includes the user you want to remove.
3. Members of the selected group appear.
4. Click the user to remove.
5. The View User Information screen is displayed.
6. Click the Delete button () to delete the user from the group.
7. A confirmation message is displayed.
8. Click **OK**.

Managing User Groups

Creating a New User Group

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


1. Access the User Groups folder in the administrator Workarea, as described in "[Accessing the User Group Folder](#)" on [page 114](#).
2. Click the Add User Group button ().
3. The Add a New User Group to the System screen is displayed.
4. Enter a name and brief description of the user group you want to create.
5. Click the Save button ().

Assigning Users To User Groups

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

1. Access the User Groups folder in the Workarea.
2. Click the user group to which you want to add a user.
3. The View Users in Group screen appears with all current members of the group.

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

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

Viewing the Users in a User Group

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

1. Access the User Group folder in the administrator Workarea, as described in ["Accessing the User Group Folder" on page 114](#).
2. Click the user group whose members you want to view.
3. The View Users in Group screen appears with a list of users who are members of the group.

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

You can also send an email to any group member by clicking the checkbox next to the email icon on the same line as the user's name.

View Users in Group "Everyone"				
Username	Lastname	Firstname	Language	All
admin	Administrator	Application	App Default	<input checked="" type="checkbox"/>
jedit	Edit	John	App Default	<input type="checkbox"/>
jsmith	Smith	John	App Default	<input type="checkbox"/>
thrown	Brown	Tina	App Default	<input type="checkbox"/>



After selecting all users to receive email, click the email toolbar button (). A new screen appears that lets you compose the email.

Editing a User Group

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

NOTE [You cannot edit the default Administrators and Everyone user groups.](#)

To edit a user group, follow these steps.


1. Access the View Users in Group screen for the user group you want to edit, as described in "[Viewing the Users in a User Group](#)" on page 121.
2. Click the User Group you want to edit.
3. The View Users In Group screen is displayed.
4. Click the Edit button ()
5. The Edit User Group screen is displayed.
6. Make the necessary changes.
7. Click the Update button ()

Deleting a User Group

When you do not need a User Group anymore, you can delete it from the system.

NOTE [You cannot delete the Administrator and Everyone groups.](#)

To delete a user group, follow these steps.

1. Access the View Users in Group screen for the user group you want to delete, as described in "[Viewing the Users in a User Group](#)" on page 121.
2. Click the User Group you want to delete.
3. The View Users In Group screen is displayed.
4. Click the Delete button ()
5. A confirmation message is displayed.
6. Click **OK**.
7. The User Group is deleted from the Ektron CMS400.NET Web site.

Removing Users from User Groups

See "[Removing Users from User Groups](#)" on page 119.

Defining Roles

Ektron CMS400.NET contains an Administrators User Group. Any user who is a member of that group automatically has full administrator privileges. See Also: "[Suggestions for Using The Folder- User Admin Role](#)" on page 125

The Roles feature lets you assign *limited* or *specific* administrator privileges to users who should not have full administrator privileges. For example, you can let certain users create, redirect, or remove tasks but deny them other privileges normally granted to administrators.

Best Practice

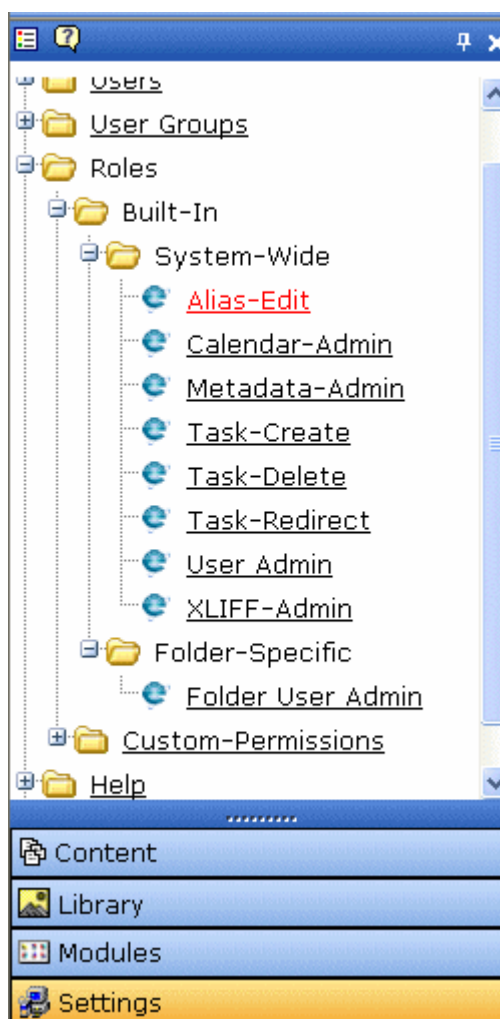
When creating new user groups to use with roles, assign names as a mnemonic aid for the role, especially for folder-specific rules. For example, the **Marketing Folder Admins** user group could be used for all role members who can administer the marketing folder.

NOTE The Permissions Table lets you control which users can manage a folder's properties, its content, library items, and create or edit collections. (See Also: "[Setting Permissions](#)" on page 86) So, together, the Roles feature and the Permission Table give you the ability to assign administrative privileges to users who are not members of the Administrators group.

Using the Roles Screens

Use the Roles screens to assign limited administrator privileges. To access the Roles screens, go to the **Ektron CMS400.NET** Workarea and select **Settings > Roles** (see illustration below).

NOTE In the screens listed below, you can select users or groups. However, you can never select the Administrators group, because that group already has all permissions.



The following table describes the Roles screens.

Screen	Lets you give a user or user group the ability to	For more information, see
Alias-Edit	Assign a manual alias to content	"Permissions for Manual Aliasing" on page 617
Calendar-Admin	Create, edit and delete calendars	"Calendar Permissions" on page 408

Screen	Lets you give a user or user group the ability to	For more information, see
Metadata-Admin	View, create and edit metadata definitions	"Metadata" on page 68
Task Create	Create tasks	"Task Permissions" on page 373
Task Delete	Delete tasks	"Task Permissions" on page 373
Task Redirect	Redirect tasks	"Task Permissions" on page 373
User-Admin	Create, view, edit, and delete users and user groups	"Managing Users & User Groups" on page 113
XLIFF-Admin	Use the Language Xport feature, which copies content into XLIFF files that can be submitted to a translation agency.	"Using the Language Export Feature" on page 455
Rule Editor	Create and edit Business Rules	
Folder-User Admin	Which users and groups can view and edit folder properties. These users can update properties, permissions, the approval chain, metadata, web alerts, purge history, etc. For example, create a user group and give it permission to manage the top-level marketing folder. Members of the group can do everything to that folder and its subfolders, but lack authority over other folders. <i>See Also:</i> "Suggestions for Using The Folder- User Admin Role" on page 125	"Folder Properties" on page 38
Custom Permissions	Would be used by a developer when extending Ektron CMS400.NET's standard features.	

Suggestions for Using The Folder- User Admin Role

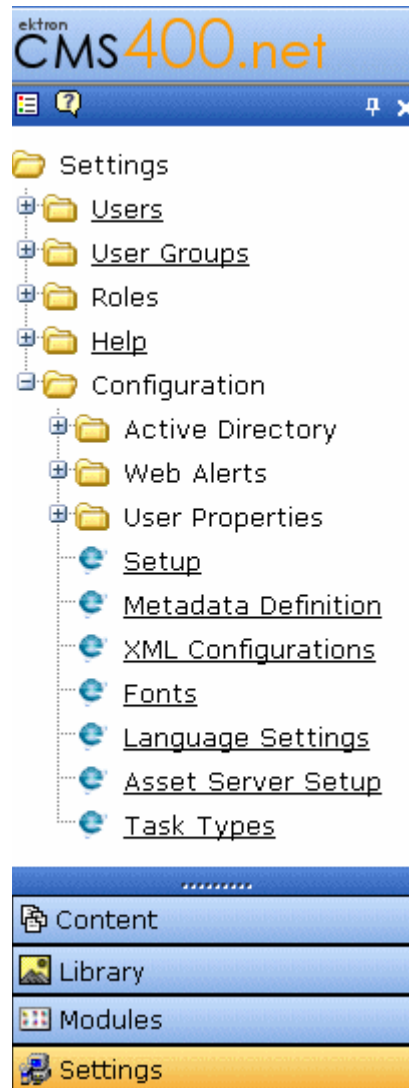
When setting up users and groups for administrative access over folders, keep these in mind.

- After being identified on the Manage Members for Role: Folder User Admin screen, users or groups must also be given permission for individual folders on the **Folder Properties > View Permissions for Folder** screen.
- Use a consistent identity for each. So, if a user group is listed for the role, use the same group when assigning folder permissions, not simply a group member. Conversely, if individual users are listed on the role screen, they must be specified in the folder permission.
- Ektron *strongly* recommends adding only user groups to the Folder User Admin role, not individual users.

If you set up an individual user as a role member, he could accidentally receive administrative rights to other folders.

List of Administrator Privileges

Administrator privileges include access to most screens that appear when you select **Settings** from the lower left panel of the workarea (illustrated below).



Administrators can also

- edit folder properties (including Web alerts, metadata, permissions, and the approval chain)
- manually alias content
- add, edit, or delete a calendar
- create, view, edit, and delete metadata definitions

- create, redirect, and delete tasks
- export content for translation to another language using XLIFF

Manage Custom Roles

extend **Ektron CMS400.NET**'s standard Roles feature. After creating roles on this screen, you can manipulate the roles using the developer API.

Private Content & Memberships

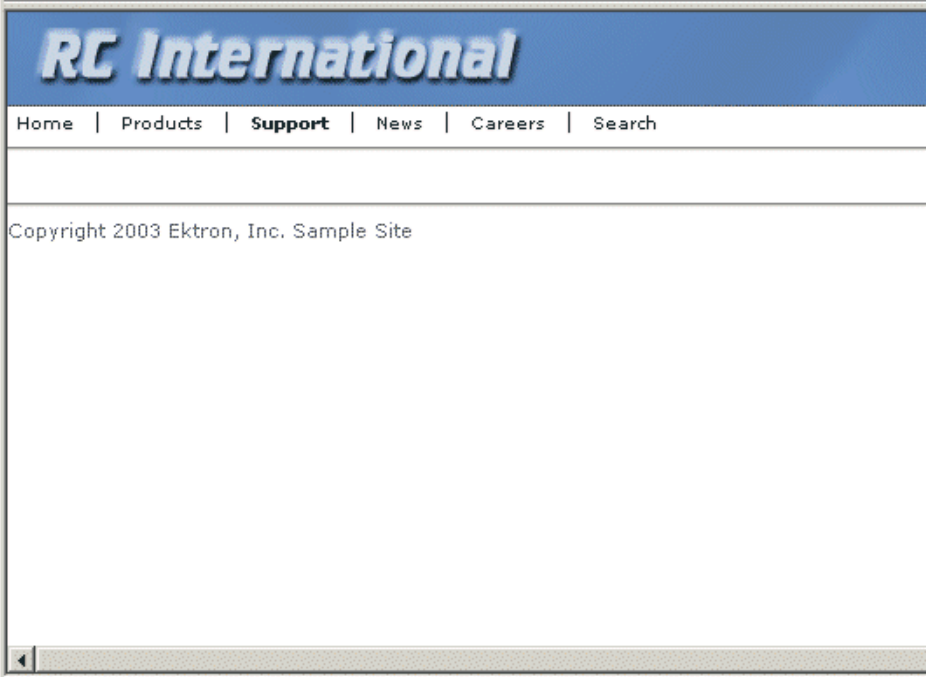
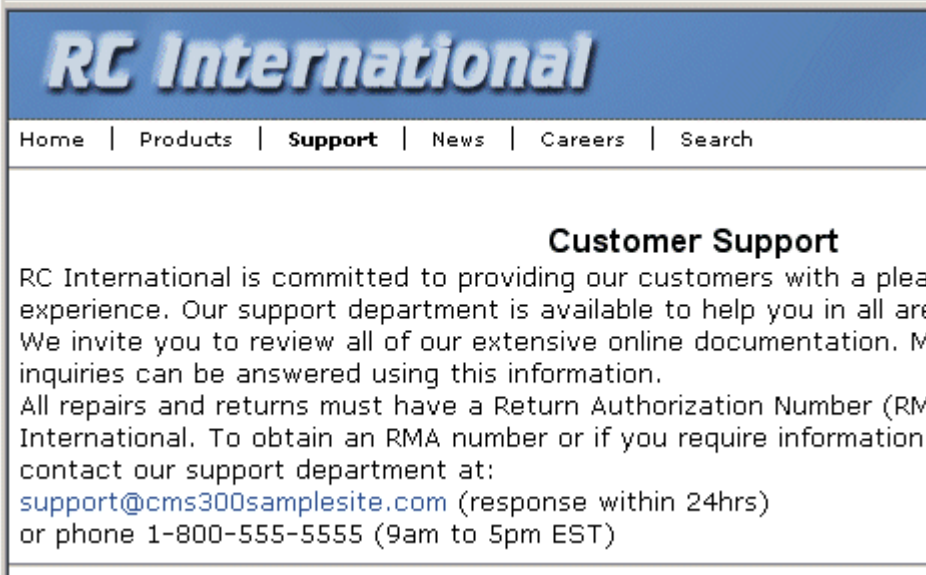
This section explains the concepts to understand and procedures to follow when working with membership users and groups through the following topics:

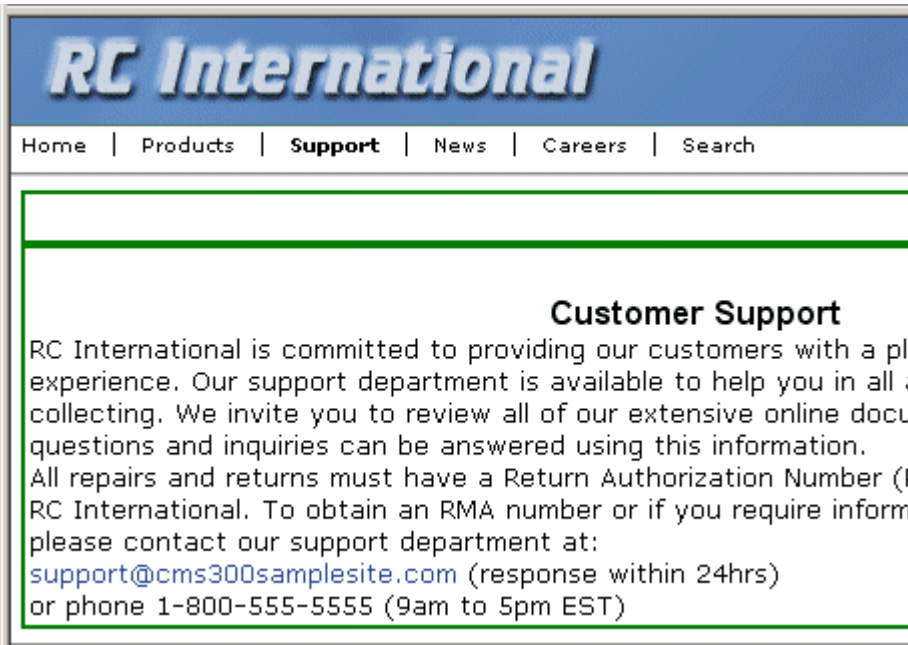
- ["Private Content" on page 129](#)
- ["Memberships" on page 132](#)
- ["Accessing the Membership Module Folder" on page 132](#)
- ["Membership Users" on page 133](#)
- ["Membership User Groups" on page 137](#)
- ["Assigning Permissions for Memberships" on page 140](#)
- ["Troubleshooting Problems with Membership Users and Groups" on page 141](#)

Private Content

Private content is stored in **Ektron CMS400.NET** folders that are designated as private. Private content is only viewable by browsing the Web site while logged in by users who have *at least* Read-Only permissions for content or a folder.

To demonstrate private content, the following table shows three scenarios and how the user's status affects the display of the content.

Scenario	Web Page Display
<p>Site visitor accesses content in a private folder</p>	 <p>The screenshot shows the RC International website. The header is blue with the text "RC International" in white. Below the header is a navigation menu with links: Home Products Support News Careers Search. The main content area is white and contains the text "Copyright 2003 Ektron, Inc. Sample Site". The footer is a light gray bar with a small left arrow icon.</p>
<p>Logged in user with read-only permissions accesses content in a private folder</p>	 <p>The screenshot shows the RC International website with the same header and navigation menu as the previous one. The main content area is white and contains a section titled "Customer Support". The text in this section reads: "RC International is committed to providing our customers with a pleaa experience. Our support department is available to help you in all are We invite you to review all of our extensive online documentation. M inquiries can be answered using this information. All repairs and returns must have a Return Authorization Number (RM International. To obtain an RMA number or if you require information contact our support department at: support@cms300samplesite.com (response within 24hrs) or phone 1-800-555-5555 (9am to 5pm EST)".</p>

Scenario	Web Page Display
<p>Logged in user with more than read-only permissions accesses content in a private folder</p>	 <p>Customer Support</p> <p>RC International is committed to providing our customers with a pl experience. Our support department is available to help you in all : collecting. We invite you to review all of our extensive online docu questions and inquiries can be answered using this information. All repairs and returns must have a Return Authorization Number (f RC International. To obtain an RMA number or if you require inform please contact our support department at: support@cms300samplesite.com (response within 24hrs) or phone 1-800-555-5555 (9am to 5pm EST)</p>

Making a Folder Private

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

To make a content folder private, follow these steps.

1. Access the permissions table for a content folder or content in your Workarea, as described in ["Setting Permissions" on page 86](#).
2. Check the box that says **This content in this folder is private and is NOT viewable on the public Web site**.
3. A confirmation message is displayed.
4. Click **OK**.

The content or folder is now private.

Memberships

What are Membership Users or User Groups?

Users and user groups who can view private content after log in are given *membership* status. When a membership user logs in, he can only *view* content -- all other functionality is disabled. Once logged in, only a logout button is displayed.

Membership groups are used to group similar membership users. See Also: "[Private Content](#)" on page 129

NOTE While the primary focus of membership users is the ability to view private content, they are also used to categorize users who subscribe to a Web Alert. For more information, see "[How Users Sign up for Subscriptions](#)" on page 189.

Membership User/User Group Example

A typical membership scenario is a Partners section of your Web site that contains private content for partners only. However, you don't want partners to perform any Ektron CMS400.NET-related activities.

You can set up a membership user group to include users from your partner's organization. The group is given read-only permissions to the Partners section, which contains private content. Any partner can log into Ektron CMS400.NET and view the private content.

.

Accessing the Membership Module Folder

Use the Membership Module folder to enter and edit membership users and user groups. To access the folder, follow these steps.

1. Navigate to the Workarea.
2. From the left frame of the Workarea, click the **Modules** folder button.
3. The Modules folder hierarchy is displayed.

- Click the **Membership** folder to view its subfolders.


Folder Name	More Information
Users	"Membership Users" on page 133
User Groups	"Membership User Groups" on page 137

Membership Users

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

Adding Membership Users

To add a new membership user, follow these steps.

- Access the membership users folder, as described in ["Accessing the Membership Module Folder" on page 132](#).
- Click the Add Membership User button ().
- The Add Membership User screen is displayed.
- Complete the form using the following table as a reference.

Field	Description
Username	Enter a unique username for the membership user.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Pwd.	Re-type the password to confirm it is correct.
Email Address	Enter an email address for the user.

- Click the Save button ().

Adding Membership Users to a Membership User Group

See ["Adding Membership Users to a Membership User Group" on page 138.](#)

Setting Permissions on Private Content for Membership Users

See ["Assigning Permissions for Memberships" on page 140.](#)

Viewing Membership User Information

To view membership user information, follow these steps.

1. Access the membership users folder, as described in ["Accessing the Membership Module Folder" on page 132.](#)

NOTE

The `ek_PageSize` setting in the `web.config` file determines the maximum number of users that can appear on a page before it "breaks." When a page breaks, additional entries appear on another screen, and the following text appears near the bottom of the list:

Page 1 of 2

[\[First Page\]](#) [\[Previous Page\]](#) [\[Next Page\]](#) [\[Last Page\]](#)

The View Users in Group All_Members screen lets you add new users, as well as sort and search for existing users. See ["Sorting Membership Users" on page 134](#) and ["Searching for Membership Users" on page 135.](#)

2. Click the user you want to view.
3. The View Membership User Information screen is displayed. From this screen, you can edit or delete membership users.

Sorting Membership Users

You can arrange users on the View Users in Group All_Members screen by clicking the following column headers:

- Username
- Last Name
- First Name

By default, users are arranged alphabetically by Username, starting with the beginning of the alphabet. To switch that arrangement so that users whose username is *last* when sorted

alphabetically, click the column header. To revert to the original arrangement, click the header again.

You can also sort the list by last name or first name. Like username, clicking the column header reverses the arrangement.

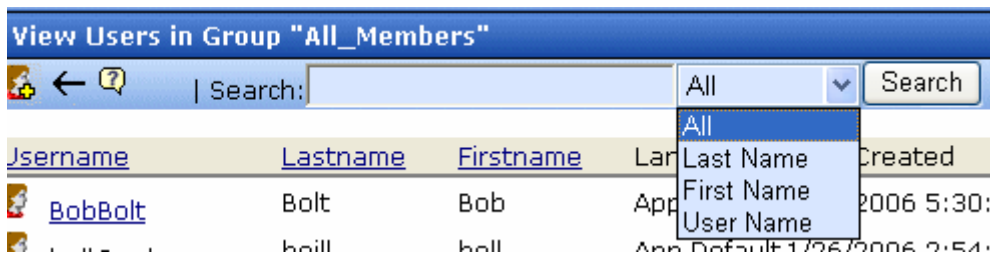
Searching for Membership Users

You can use the **Search** field (circled below) to display only users who meet your criteria. This would be especially helpful to filter out a large number of membership users.



Use the **Search** field to enter unique characters to find members you seek. For example, to find all members whose username includes **@yahoo.com**, enter that into the **Search** field and click the **Search** button. Only users with those characters in that exact sequence in their username, first name, or last name appear on the screen.

You can also search by First and Last name fields. Click the down arrow to the left of the **Search** button to select a field to search.




The sequence of search characters must match your entry in the **Search** field. For example, if you are searching by last name and enter **MI**, anyone whose name is *Smith* appears. But, if you enter **IM**, users with the last name of *Smith* do not appear.

Also, the search is case-insensitive, so **MI** produces the same results as **mi**.

Editing Membership Users

To edit a membership user, follow these steps.


1. Access the View Membership User screen of the membership user you want to edit, as described in "[Viewing Membership User Information](#)" on page 134.
2. Click the Edit button ()
3. The Edit Membership User Information screen is displayed.
4. Use the following table to assist with editing the membership user's information.

Field	Description
Username	Enter a unique username for the membership user.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user.
Confirm Pwd.	Re-type the password to confirm it is correct.
Email Address	Enter an email address for the user.

5. Click the Update button ()

Deleting Membership Users

To delete a membership user, follow these steps.

1. Access the View Membership User screen of the membership user you want to edit, as described in "[Viewing Membership User Information](#)" on page 134.
2. Click the Delete button ()
3. A confirmation message is displayed.
4. Click **OK**.

Membership User Groups

Membership user groups organize similar membership users, reducing the effort required to assign identical permissions to many users. You can assign them Read-only permission to any folder by going to **Folder Properties > View Permissions for Folder > View MemberShip users**.



The content in this folder is private and can only be viewed by authorized users and members.

[View Advanced Permissions](#)


[View MemberShip users](#)


User or Group Name	Read Only	Edit	Add	Delete	Restore	Library Read	Add Images	Add Files	Add Hyperlinks	Overwrite Library
admin	x	x	x	x	x	x	x	x	x	x
Bob	x	x	x	x	x					

The following sections explain membership user group management.

Adding Membership User Groups

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

1. Access the membership user group folder, as described in "[Accessing the Membership Module Folder](#)" on page 132.
2. Click the Add Membership User Group button ()

3. The Add a New User Group screen is displayed.
4. Enter a unique name for the group.
5. Click the Save button ().

See Also: ["Membership User Groups" on page 137](#)

Viewing Users in a Membership User Group

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


1. Access the membership user group folder, as described in ["Accessing the Membership Module Folder" on page 132](#).
2. Click the membership user group you want to view.
3. The View Users In Group screen is displayed.

See Also: ["Membership User Groups" on page 137](#)

Adding Membership Users to a Membership User Group

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

NOTE [Only membership users can be added to membership user groups.](#)

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

NOTE [Only membership users who do not belong to the group appear.](#)

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

See Also: ["Membership User Groups" on page 137](#)



Setting Permissions on Private Content for Membership User Groups

See ["Assigning Permissions for Memberships" on page 140](#)

Editing Membership User Group Name

To edit a membership user group name, follow these steps.


NOTE [The membership user group, All_members, cannot be edited.](#)

1. Access the View Membership User Group screen for the membership group you want to edit, as described in ["Viewing Users in a Membership User Group" on page 138](#).
2. Click the Edit button (.
3. The Edit User Group screen is displayed.
4. Change the membership group name.
5. Click the Update button (.

See Also: ["Membership User Groups" on page 137](#)

Deleting User from Membership User Group


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

1. Access the View Membership User Group screen for the membership user group that contains the membership user you want to delete, as described in ["Viewing Users in a Membership User Group" on page 138](#).
2. Click the name of the membership user you want to remove.
3. The View User Information screen is displayed.
4. Click the Delete button (.
5. A confirmation message is displayed.

6. Click **OK**.

Deleting Membership User Groups

To delete a membership user group, follow these steps.


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


Assigning Permissions for Memberships

After you create membership users and groups, you can assign them permissions to content folders. To do so, follow these steps.

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

For ...	See...
Content folders	"Setting Permissions for a Content Folder" on page 90
Content	"Setting Permissions for Content" on page 93

2. If necessary, break the inheritance for the content or folder. See *Also*: ["Inheritance" on page 87](#)
3. Set the content folder or item to **Private**. See *Also*: ["Private Content" on page 129](#)
4. Click **View MemberShip Users** on the right end of the permissions table.
5. The membership users/user groups added to the permissions table are displayed.
6. Click the Add button ()
7. The Add Permissions screen is displayed.

8. Click a username or user group name to add to the permissions table.
9. The Add Permissions Options screen is displayed.
10. Check **Read-only** if you want the membership user or user group to be able to view the private content when logged in.
11. Click the Save button ()

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

Troubleshooting Problems with Membership Users and Groups

Symptom	Problem	Solution
<p>Error message:</p> <p>Response object error 'ASP 0251 : 80004005'</p> <p>Response Buffer Limit Exceeded</p>	Response Buffer exceeded its limit	<p>Increase limit. To do so, follow these steps.</p> <ol style="list-style-type: none"> 1. Stop IIS. 2. Locate the file %WinDir%\System32\Inetsrv\Metabase.xml 3. Modify the AspBufferingLimit value. 4. Restart IIS. <p>The default value is 4194304, which is about 4 MB. Suggest changing it to 20MB (20971520) and see if that helps.</p>

Custom User Properties

Custom User Properties allow you to create custom fields. These custom fields appear on the User Properties and Membership User Properties screens. They are used to define information about a user beyond the standard Ektron CMS400.NET user properties, such as Username, First Name, Password and email Address.

Examples of Custom User Properties might be:

- employee ID
- phone number
- phone extension
- instant message screen name
- position
- start date
- department
- birthday
- the IP address of the user's machine

Your ability to create and manage custom user properties is explained through the following topics.

- ["The View Custom Properties Screen" on page 143](#)
- ["Adding a Custom User Property" on page 144](#)
- ["Editing a Custom User Property" on page 154](#)
- ["Deleting a Custom User Property" on page 155](#)
- ["Setting the Custom User Properties Order" on page 156](#)
- ["Using Custom User Properties for Non-English Languages" on page 158](#)

NOTE





Only members of the Administrator User Group can work with Custom User Properties.

The View Custom Properties Screen


Use the View Custom Properties screen to create custom properties for users and membership users. From the View Custom Properties screen, you can:


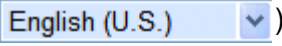
- add a new custom property. See ["Adding a Custom User Property" on page 144](#)
- edit a custom property. See ["Editing a Custom User Property" on page 154](#)
- reorder the way custom properties appear on the users and membership users screen. See ["Setting the Custom User Properties Order" on page 156](#)
- work with custom properties in different languages. See ["Using Custom User Properties for Non-English Languages" on page 158](#)

Below is an example of the View Custom Properties screen.

View Custom Properties		
  English (U.S.)  		
Title	ID Type	Required
phone number	3 String	<input type="checkbox"/>
Subscriptions	1 Category	<input type="checkbox"/>
zip code	5 String	<input type="checkbox"/>
age	11 Numeric	<input type="checkbox"/>
Graduation date	12 Date	<input type="checkbox"/>
Health Ins. Provider	13 SelectList	<input type="checkbox"/>
Deductions	14 MultiSelectList	<input type="checkbox"/>

The table below describes the View Custom Properties screen.

Buttons, Dropdown Boxes or Fields	Description	For More Information
Add button ()	Add custom user properties.	"Adding a Custom User Property" on page 144

Buttons, Dropdown Boxes or Fields	Description	For More Information
Reorder button ()	Change the order in which the custom properties appear on the Users or Membership User Properties screen.	"Setting the Custom User Properties Order" on page 156
Language Selection Dropdown List ()	Allows you to view custom user properties by language.	"Viewing Custom User Properties By Language" on page 160
Title Field	Displays the title of a custom user property. When viewing by language, the title changes to the title used in a specific language if it has been defined. Click a Title to edit the property. <u>Note: The title and label are the same field. On some screens, Title is used; on others Label is used.</u>	"Editing a Custom User Property" on page 154
Type Field	Shows the Type that was chosen for a custom user property.	"Type" on page 146
Required Field	Shows whether the field is required.	"Required" on page 146

Adding a Custom User Property

After you add a custom user property, it appears on all User and Membership User Information screens, under the **User Properties** header. When new users and membership users are added, custom user properties appear during the creation process.

The screenshot shows the 'User Properties' dialog box in the Ektron CMS400.NET interface. The dialog is titled 'User Properties' and is highlighted with a red rounded rectangle. It contains several input fields for user information: Birthday, Phone Number, Street Address, State Code, Zip Code (with up/down arrows), and Credit Card Info. To the left of the dialog is a sidebar with a tree view containing 'Settings', 'Users', 'User Groups', 'Help', and 'Configuration'. Below the tree is a horizontal menu with 'Content', 'Forms', 'Library', 'Modules', and 'Settings' (which is highlighted). Above the dialog, the text 'This User currently belongs to these User Groups:' is followed by a list containing 'Everyone'. Below this, under the heading 'Task permissions', are the options 'Create Task' and 'Redirect Task'.

This User currently belongs to these User Groups:

- Everyone

Task permissions

Create Task
Redirect Task

User Properties

Birthday

Phone Number


Street Address

State Code

Zip Code

Credit Card Info

Follow these steps to add a custom user property.

1. In the Workarea, click **Settings > Configuration > User Properties**.
2. Choose the standard language used in your **Ektron CMS400.NET** Workarea.
3. Click the **Add Property** button ().
4. The Add Custom Property screen appears.

Add Custom Property

Label:

Type: String ▼

Input Type: TextBox ▼

Validation: No Validation ▼

Message:

5. Fill out the information on this screen according to the table below.

The Custom User Properties Fields

The following table describes the custom user properties fields

Field	Description	More Information
Label	Title of the property you are adding. For example, Employee ID. <u>Note: The Title and Label are the same field. On some screens the word Title is used, on others the word Label is used.</u>	
Type	The type of data for the property. Once a type is selected and saved for the property, you cannot change it. You must delete the custom property and re-enter it.	"The Type Field" on page 147
Required	Prevents a user from saving the page without filling out the fields you designate as required. If you make the property a requirement, a red asterisk appears next to the property label. For example: *Employee ID <input type="text"/>	
Input Type	Choose how a user is able to enter a response to the property.	"The Input Type Field" on page 148
Validation	Validation ensures that the right type of data is entered in a text box or text area.	"Validation" on page 149

Field	Description	More Information
Min Value	If desired, enter the minimum value you want to allow. The Min Value only appears when the following Validations are used: Numeric Only, Date Only and U.S. Zip Code. The following is an example of a Date Only Min Value: 01/01/1900 .	
Max Value	If desired, enter the maximum value you want to allow. The Max Value only appears when the following Validations are used: Numeric Only, Date Only and U.S. Zip Code. The following is an example of a Date Only Max Value: 01/01/1987 .	
Message	The message that appears when information entered in a user property violates the validation criteria. For example, if the validation is U.S. Zip Code, you might use the following message: Please enter a valid zip code	

6. Click the **Save** button (.

7. The new property appears on the View Custom Properties screen.

The Type Field


The following table describes the types available in the Type field.


Types	Description	Input Types Available	Validations Available
String	Accepts all alpha, numeric, and symbol characters	<ul style="list-style-type: none"> Text Box Text Area Hidden 	All validations <i>See Also:</i> "Validation" on page 149
Boolean	Accepts a true or false response	<ul style="list-style-type: none"> Check Box 	None

Types	Description	Input Types Available	Validations Available
Numeric	Accepts numbers only	<ul style="list-style-type: none"> Text Box 	<ul style="list-style-type: none"> No Validation Cannot be blank Numeric Only U.S. Zip Code Dollar Amount
Date	Only a date can be entered.	<ul style="list-style-type: none"> Text Box 	<ul style="list-style-type: none"> No Validation Cannot be blank Date Only
SelectList	Select a response from a list of choices. See Also: "SelectList Field" on page 151	NA	NA
Multi SelectList	Select any number of responses from a list of choices. See Also: "MultiSelectList Field" on page 153	NA	NA
Category	A system-defined type that appears when the first subscription is created. One entry covers all subscriptions. See Also: "Defining Subscriptions" on page 179.	NA	NA

The Input Type Field

The following table describes possible responses to the **Input Type** field.

Input Type	Description	An Option When Used With
Text Box	Creates a standard text box. Below is an example of a text box. 	<ul style="list-style-type: none"> String Numeric Date

Input Type	Description	An Option When Used With
Text Area	Creates a multi-lined area for entering text. Typically used when more than one line of text needs to be added. Below is an example. 	<ul style="list-style-type: none"> String
Hidden	Hides the input field. This can be used by an administrator to add additional values at postback time. This requires a developer to add client-side JavaScript.	<ul style="list-style-type: none"> String
Check Box	Creates a checkbox. Used when the field requires a boolean (true / false) response. Below is an example of a check box. <input checked="" type="checkbox"/> = True <input type="checkbox"/> = False	<ul style="list-style-type: none"> Boolean

Validation

The following table describes the validations available in the **Validation** field.

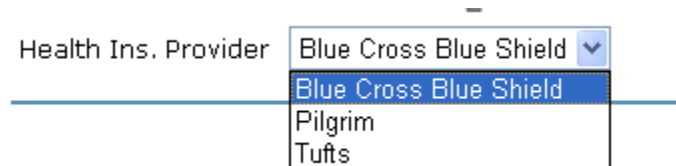
Validation	Description	An Option When Used With
No Validation	The entry is not checked.	<ul style="list-style-type: none"> String Numeric Date
Cannot be blank	A response must be entered.	<ul style="list-style-type: none"> String Numeric Date
Numeric Only	The response must be a number.	<ul style="list-style-type: none"> String Numeric
Text Only	The response must be characters.	<ul style="list-style-type: none"> String

Validation	Description	An Option When Used With
Date Only	The response must be entered in the following format: mm/dd/yyyy.	<ul style="list-style-type: none"> String Date
Email Only	The response must be entered as an Email address. For example, username@domain.domainextention.	<ul style="list-style-type: none"> String
Credit Card Only	The response must be entered as a credit card number. For example, nnnn nnnn nnnn nnnn	<ul style="list-style-type: none"> String
Social Security Only	The response must consist of nine digits in this pattern: nnn-nn-nnnn.	<ul style="list-style-type: none"> String
U.S. State Code	A two letter state code. For example: NH = New Hampshire.	<ul style="list-style-type: none"> String.
U.S. Zip Code	<p>The response must consist of 5 (nnnnn) or 9 digits separated by a dash after the fifth (nnnnn-nnnn).</p> <p><u>Note: If you use the Numeric Type, you cannot have a dash or space when using a nine digit Zip Code</u></p>	<ul style="list-style-type: none"> String Numeric
Valid US Phone Number	The response must consist of a 10 digits in this pattern: nnn-nnn-nnnn.	<ul style="list-style-type: none"> String
Canadian Postal Code	The response must consist of 6 (xnx nxn) alpha or numeric characters with a space after the first three characters.	<ul style="list-style-type: none"> String
Time HH:MM or HH:MM:SS or HH:MM:SS.mm	<p>Time is entered in one of the following three formats.</p> <p>HH:MM - Hours and Minutes 09:30</p> <p>HH:MM:SS - Hours, Minutes and Seconds 09:30:45</p> <p>HH:MM:SS.mm - Hours, Minutes, Seconds and milliseconds 09:30:45.002</p>	<ul style="list-style-type: none"> String
IP Address	The response must be in the form of an IP address.	<ul style="list-style-type: none"> String

Validation	Description	An Option When Used With
Dollar Amount	<p>This validation works differently depending on the Type used. If used with the <i>String</i> Type, you can have a dollar sign (\$) along with the money amount in the text field.</p> <p>When used with the <i>Numeric</i> Type, you are not allowed to have a dollar sign (\$) in the text field. The following are examples of each type with validation:</p> <p>String - \$3.00</p> <p>Numeric - 3.00</p>	<ul style="list-style-type: none"> String Numeric
Canadian Social Insurance Number	The response must consist of nine digits in this pattern (nnn nnn nnn).	<ul style="list-style-type: none"> String

SelectList Field

Use a **SelectList** field to present the user completing the User Information or Membership User Properties screen with a list of choices. See example below.



When you create a custom user property and specify its type to be **Select List**, the screen changes as shown below.

Completing a SelectList Field Entry

To add an item to the list, enter its text in the **Text** field, then click the **Add** button. Added items then appear in the larger box on the left.

You can then

- *remove* any item from the list by clicking it. It appears in the **Text** field. Click **Remove**.
- *change* the text of any list item by clicking it. It appears in the **Text** field. Make changes then click **Change**.
- *change the sequence* of list items by selecting an item then clicking the up or down arrow to move the item

Using the First List Item to Prompt a Response

You can use the first list item to prompt the user to make a selection instead of being a valid response. For example, the first list item may say **Select from a list of choices**. To do this, check the **First item is not a valid selection for example, "[Select]"** check box.

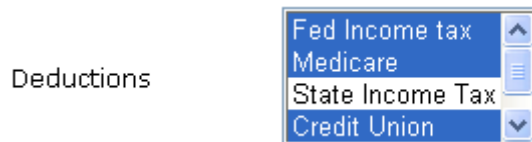
If you do, the field has an asterisk (*) next to it (indicating it is required) on the User Information and Membership User

Properties screens. The user completing the screen must choose any selection other than the first item. If he tries to file the screen without choosing a different item, the following error message appears:

Please fill in all required fields (*)

MultiSelectList Field

Use a **MultiSelectList** field to present the user completing the User Information or Membership User Properties screen with a list of choices. The user can choose as many responses as appropriate. See example below.



Selected items are indicated by a blue background.

When you create a custom user property and specify its type to be **MultiSelect List**, the screen changes as shown below.

Add Custom Property

Label:

Type: **MultiSelectList**

Add items you want to display in select list

Text:

☐ First item is not a valid selection for example, "[Select]"

For information about completing the screen, see ["Completing a SelectList Field Entry" on page 152](#).

Editing a Custom User Property

When you click a custom user property's title, you are brought to the Edit Custom Property Screen. From this screen, you can edit and delete a custom property or create a version of the custom property in a non-English language.

When you edit a custom user property, the changes are applied to all users and membership users. These changes are also applied to any other language versions of the custom properties that exist.

To learn how to:

- edit a custom user property. See ["Editing a Custom User Property" on page 154](#).
- delete a custom property. See ["Deleting a Custom User Property" on page 155](#).
- create a custom property for a non-English language. See ["Create a Custom User Property for a Non-English Language" on page 158](#).

Editing a Custom User Property

When editing a custom user property, the changes are available to users and membership users when the save button is clicked.

Follow these steps to edit a custom user property.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Click the **Title** of the Custom User Property you want to edit.
3. Choose the field you want to change. You can edit the following fields:
 - Label
 - Required

- Input Type
- Validation
- Min Value
- Max Value
- Message


For descriptions of these fields, see "The Custom User Properties Fields" on page 146

NOTE

You cannot edit the **Type** field. If you need to change the type, you must delete the custom user property and create a new one.

WARNING!


If you delete a custom user property, it is removed from all users and membership users. Any information that has been collected about users and membership users for that property will be lost. In addition, any language versions of the custom user property are deleted.

4. Click the **Save** button (.
5. When you click on a user or membership user, you see your changes.

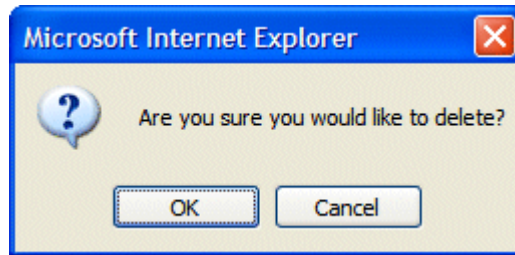
Deleting a Custom User Property

If you delete a custom user property, it is removed from all users and membership users. Any information that has been collected about users and membership users for that property will be lost. In addition, any language versions of the custom user property are deleted.

Follow these steps to delete a custom user property.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Click the **Title** of the custom user property you want to delete.
3. Click the **Delete** button (.


A dialog box appears asking if you are sure you would like to delete the item.

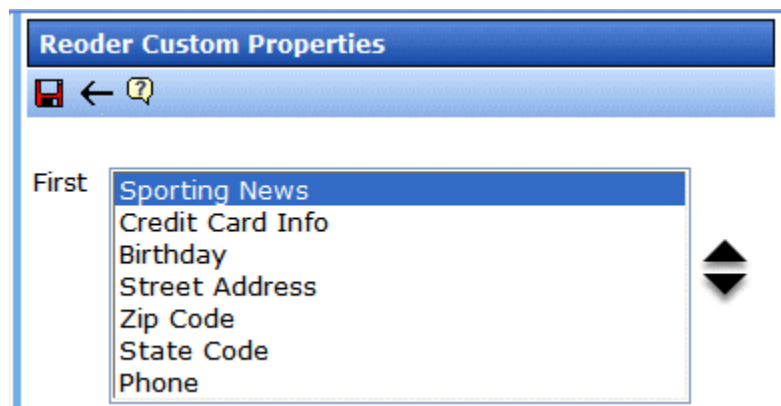


4. Click **OK**.
5. The View Custom Properties screen appears, and the property is no longer available.



Setting the Custom User Properties Order

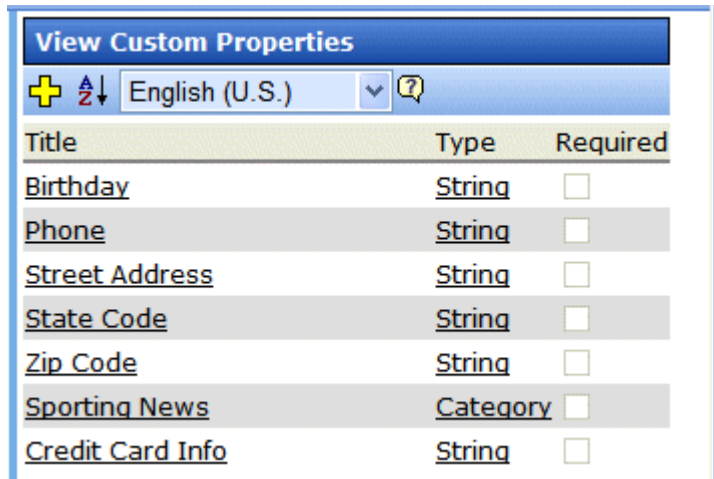
From the View Custom Properties screen, you can set the order in which the properties appear on the User and Membership Users Properties screen. To set the custom user properties order, complete these steps.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Click the **Reorder** button ().
3. The Reorder Custom Properties screen appears.

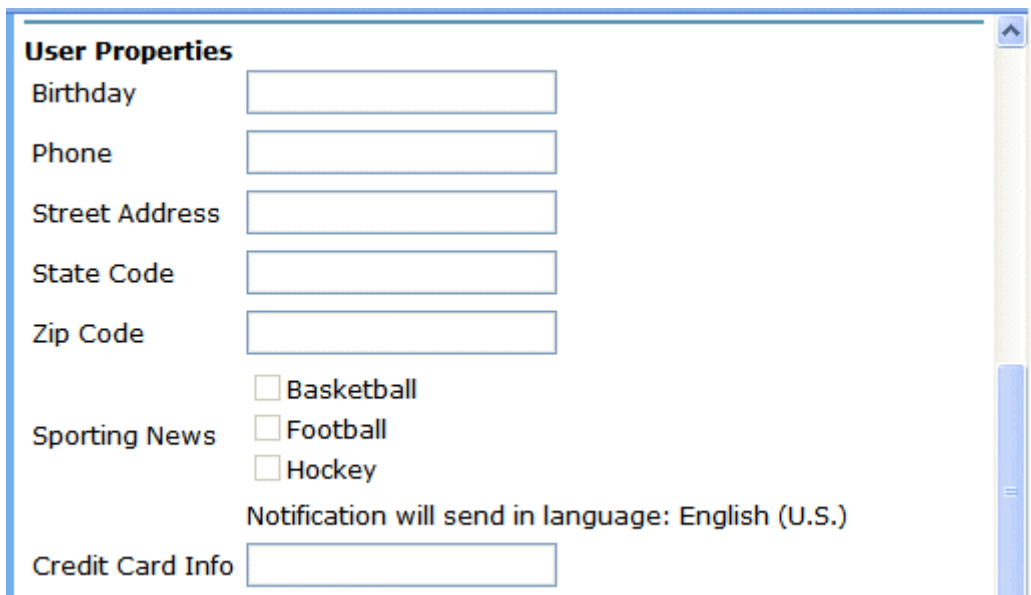


4. Click on a property.

5. Click the **Up** or **Down** arrows () to move the property up or down the list.
6. Click the **Save** button ().
7. On the View Custom Properties screen, you now see the properties in the new order. If you go to the User or Membership User Properties screen, the order of the properties there now reflects the changes.



Title	Type	Required
<u>Birthday</u>	<u>String</u>	<input type="checkbox"/>
<u>Phone</u>	<u>String</u>	<input type="checkbox"/>
<u>Street Address</u>	<u>String</u>	<input type="checkbox"/>
<u>State Code</u>	<u>String</u>	<input type="checkbox"/>
<u>Zip Code</u>	<u>String</u>	<input type="checkbox"/>
<u>Sporting News</u>	<u>Category</u>	<input type="checkbox"/>
<u>Credit Card Info</u>	<u>String</u>	<input type="checkbox"/>



User Properties

Birthday

Phone

Street Address

State Code

Zip Code

☐ Basketball

Sporting News ☐ Football

☐ Hockey

Notification will send in language: English (U.S.)

Credit Card Info

Using Custom User Properties for Non-English Languages

Like content, custom user properties have a language attribute. This is useful if you have users or membership users that only use a specific language. It can also be used if you want a custom user property to appear in the language in which the user is signed in.

Unless a language other than English is defined for a custom user property, the property defaults to the English version. For example, if you have two properties called Birthday and Phone Number in English and you can translate the French version of Birthday to Anniversaire, when you view the properties in French, you see the English version of Phone Number and the French version of Birthday.

Create a Custom User Property for a Non-English Language

When creating a custom user property, it must be created in English then translated to the desired language. This is done by editing the property, changing languages, filling out the Translate Custom Property Label screen and saving the property.

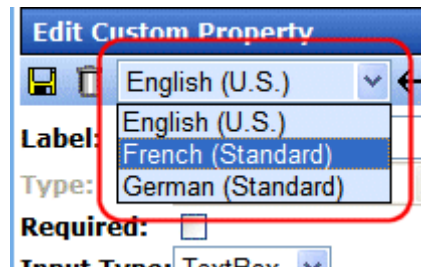
IMPORTANT!

All custom user properties in languages other than English are tied to the English version of the property. If you delete the English version of the property, all other language versions of the properties are deleted also. However, you can remove a non-English language version of the custom properties without deleting the English version. See ["Removing a Non-English Custom User Property Title" on page 159](#)

The following steps illustrate how to translate the Title/Label of a property into French.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Choose a custom property to be defined in another language.

3. Choose a language from the language select dropdown box.

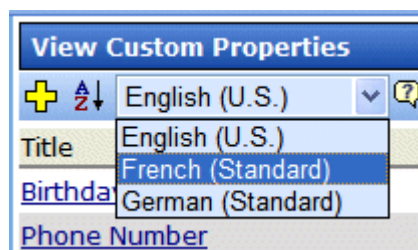


4. The Translate Custom Property Label screen appears.
5. Enter a **Label** for the property in the language you have chosen. For example, if you are creating a French version of a Birthday custom user property, you would enter Anniversaire in the label text field. For information on the Label property, see ["Label" on page 146](#)
6. Click the **Save** button (💾).

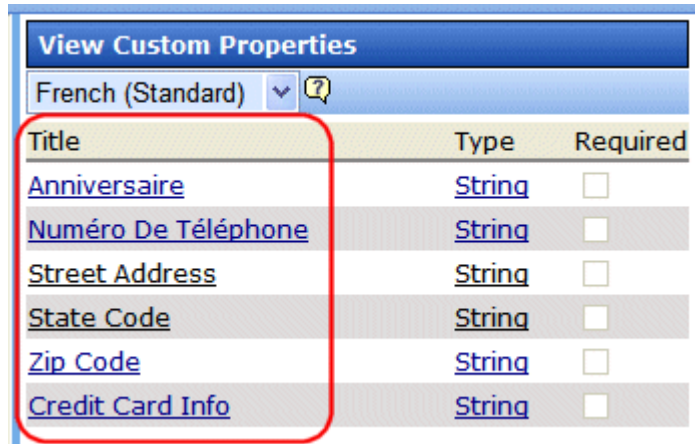
Removing a Non-English Custom User Property Title


Removing a non-English version of a custom user property title does not remove the english version of the property. When you remove the non-English version of a property, you are basically removing the label for that specific language in the custom property.

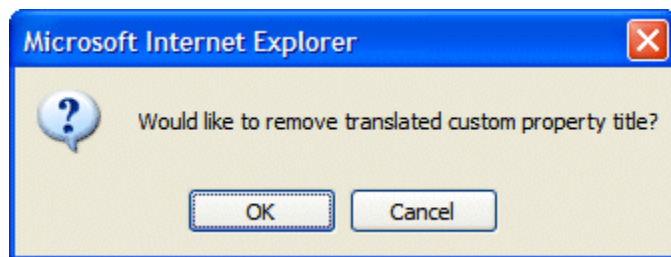
1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Choose the language in which the custom user property appears from the **Language Dropdown Box**.




- Click on the **Title** you want to delete.



- The Translate Custom Property Label screen appears.
- Click the **Delete** button ().
- A dialog box appears asking if you would like to remove the translated custom property title.



- Click **OK**.
- The English version of the Edit Custom Property screen appears.
- Click the **Back** button ().

WARNING!

Do not click the delete button on the Edit Custom Property screen. This action deletes the English version of the custom user property. If you click the delete button, you lose all information collected by the property and all language versions of the property.

Viewing Custom User Properties By Language

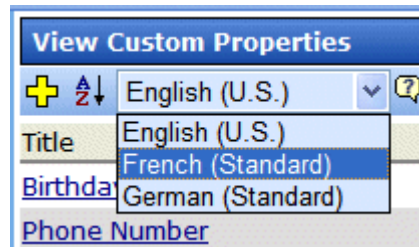
From the View Custom Properties screen, you can view the custom users properties by languages. When viewing by

languages, it is important to remember that if there is only an English version of the property, the English version appears in all the languages.

All custom user properties, in languages other than English, are tied to the English version of the property. If you delete the English version of the property, all other language versions of the properties are deleted.

To view the custom user properties by language, follow these steps.

1. In the Workarea, click **Settings > Configuration > User Properties > User Properties**.
2. Choose the language in which to view the properties from the language dropdown box.



3. The View Custom Languages screen for that language appears.

NOTE In the example below, some properties have not been translated, so the English versions appear instead.

View Custom Properties		
French (Standard) [v] [?]		
Title	Type	Required
Anniversaire	String	<input type="checkbox"/>
Numéro De Téléphone	String	<input type="checkbox"/>
Street Address	String	<input type="checkbox"/>
State Code	String	<input type="checkbox"/>
Zip Code	String	<input type="checkbox"/>
Credit Card Info	String	<input type="checkbox"/>

Web Alert Feature

The Web Alert feature enables **Ektron CMS400.NET** to generate email for a list of registered users whenever new content appears on your site, or existing content is updated.

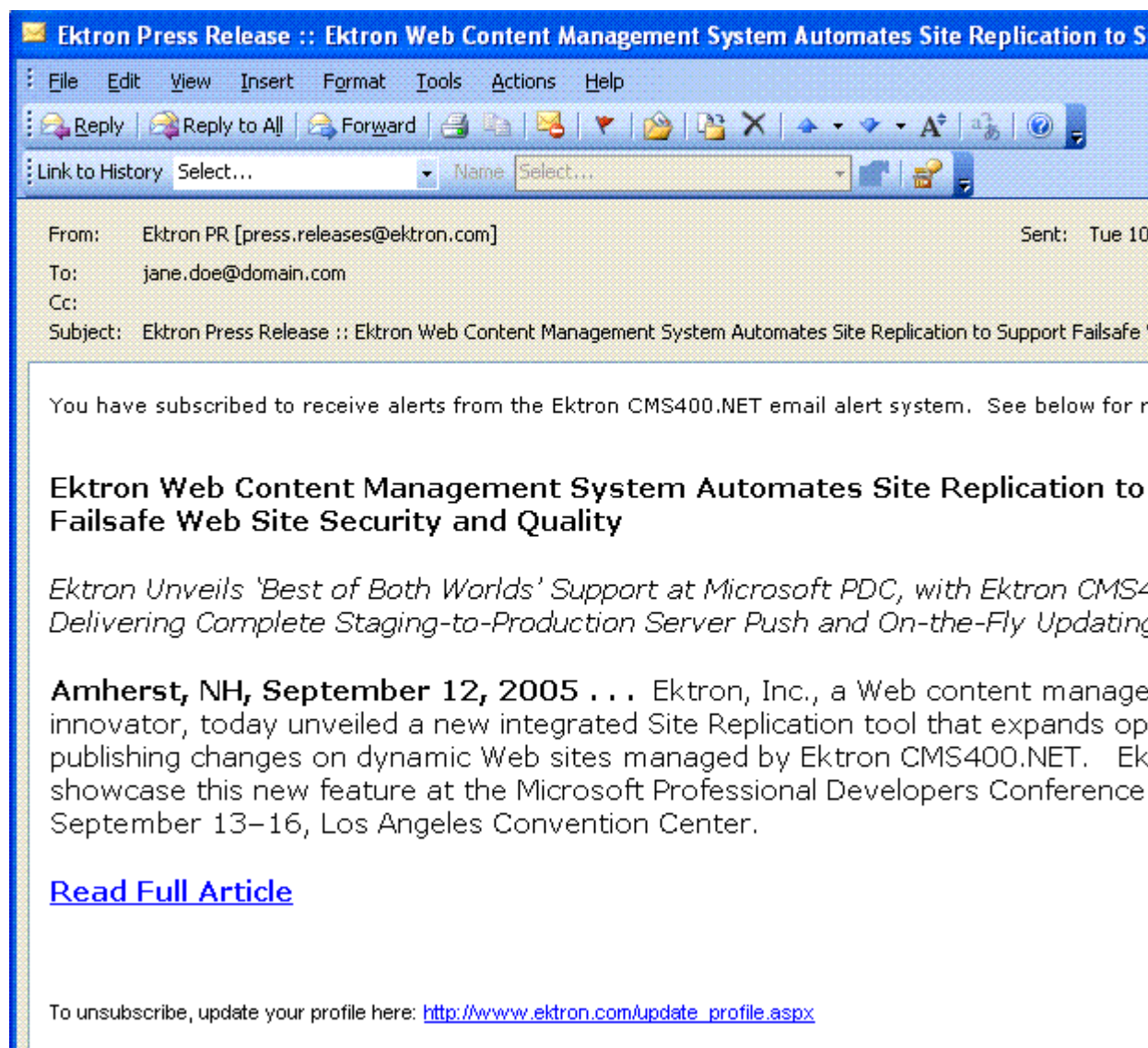
For example, anyone may register to be notified whenever new information about your product is published. As soon as the page is published on your site, registered users receive an email announcement with a link to the new/updated page. The recipient clicks the link and immediately accesses the page.

As a result, a self-selected group of users can be instantly notified of changes on your Web site relating to their interests. Once the system is set up, you don't need to do anything -- everything happens in the background.

NOTE

Only members of the Administrator User Group and users identified on the Manage Members for Role: Folder User Admin screen can work with Web Alerts.

Sample Web Alert email



This chapter explains the Web Alerts feature through the following topics.

- "How Web Alert Works" on page 164
- "Server Configuration" on page 165

- "Enabling the Web Alert Feature" on page 167
- "Setting Up the Message Queue and Asynchronous Processor" on page 168
- "Creating the email Message" on page 173
- "Defining Subscriptions" on page 179
- "Assigning Web Alert Information to Folders and Content" on page 182
- "How Users Sign up for Subscriptions" on page 189

How Web Alert Works

The following explains how Web Alert email works.

1. Content is published.
2. **Ektron CMS400.NET** checks the **This is a staging server** checkbox on the Configuration > Application Setup screen. If it is unchecked, proceed to the next step. If the box is checked, no Web alerts will be issued for this server.
3. **Ektron CMS400.NET** checks to see if any subscriptions are assigned to the folder or content. (Subscriptions can be assigned at the folder or content level.)

If no subscriptions are assigned, the **Web Alerts** tab does not appear when editing content.
4. If any subscription is assigned, **Ektron CMS400.NET** checks to see if an email should be created for this content. The settings appear under **Web Alerts** tab.

For example, some content only triggers an email when it is first published, while other items always generate an email.
5. If an email should be generated, **Ektron CMS400.NET** builds the email content by retrieving information from fields on the Folder Properties screen. These are identified under the **Web Alert Contents** section of the Web Alerts tab.
6. **Ektron CMS400.NET** determines which subscription lists should receive the email. These are identified on the **Available Web Alerts** area of the Web Alerts tab. Each list contains the email address of every subscribed user.

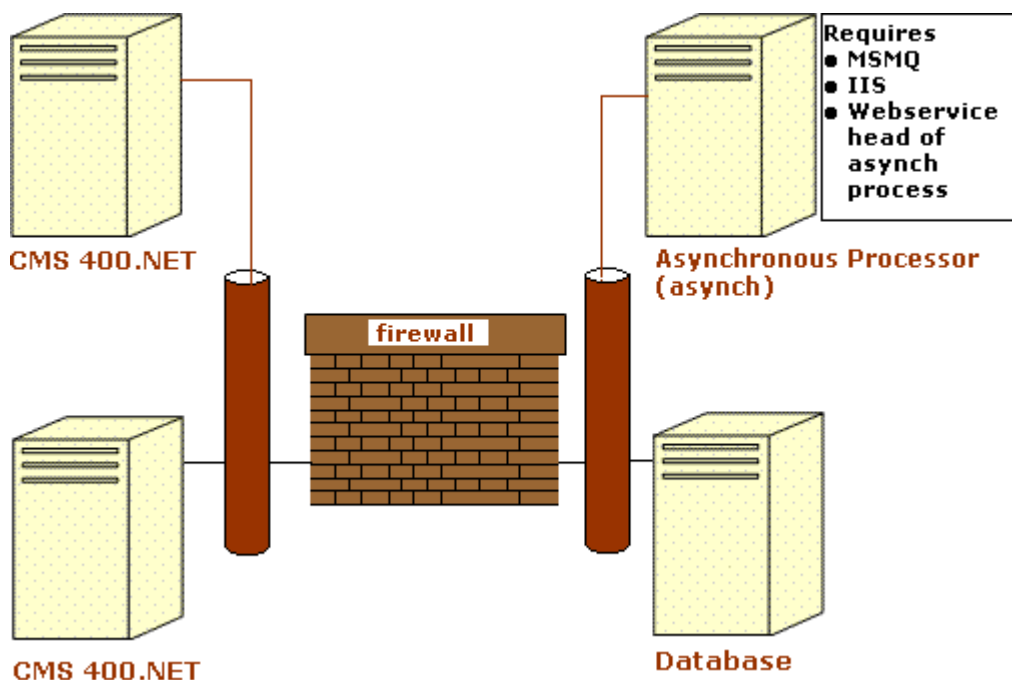
Available Web Alerts:**Assigned Name**

- ☐ Automobiles
- ☐ Motorcycles
- ☐ Trucks

Note: These are just examples of subscriptions

Server Configuration

The following illustration depicts a typical Web server configuration you would use with the Web Alerts feature.



- **Firewall** - the **Ektron CMS400.NET** business tier must have Web access to the asynchronous server. The business tier maintains the CMS files. This configuration enables proper communication between **Ektron CMS400.NET** and the asynchronous processor.

- The asynchronous processor must have port 25 (SMTP) access to a valid mail server to send emails
- The mail server (omitted from the illustration) must be allowed to send out port 25 (SMTP) traffic and can be on the Async server
- **Queuing** - Message queuing must be installed on the Async server.

You must create a message queue on the Async machine and record its name. The message queue is specified in the exe.config file for the service, and the web.config file for the Web Service interface.
- **CMS** - The web.config file includes a key for the location of the asynchronous processor. This needs to be verified as working.
- **Other** - IIS must be installed on the asynchronous processor. IIS allows a Web service call to schedule a file download and send commands.

Ektron recommends that the Async machine only allow HTTP traffic from **Ektron CMS400.NET** servers. This provides additional security on the Async processor.

Verifying Connections

- You can verify the Web service > queue connection by
 - leaving the Ektron service off, submitting content with notifications, and verifying that a message arrived in the queue
 - turning on journaling for the queue. Submit a message in the queue. The Ektron service picks it up and places it in the journaled messages.
 - turning on logging for the Ektron service
- To verify the CMS > Web service connection, open the asynchronous processor location inside a Web browser and test the Web services.

To verify the writing of files, ensure that **Ektron CMS400.NET** has write access to the `[sitepath]subscriptions` directory and submit content that will trigger notifications. This action places a file inside that directory.

- To verify that the service can download a file, open a Web browser on the Async machine and connect to the location of the notification command files. Attempt to download one.

Enabling the Web Alert Feature

Enabling the Web Alert feature involves the following steps. This section explains each step in detail.

Step	Description	For more information, see
1. Set up message queue and asynchronous processor.		"Setting Up the Message Queue and Asynchronous Processor" on page 168
2. Create messages.	Define components of the email to be sent to subscribers.	"Creating the email Message" on page 173
3. Define subscriptions.	Categories of information on your site. Site visitors can subscribe to be notified when content in a category is added or updated.	"Defining Subscriptions" on page 179
4. Assign Web Alert information to folders and content.	Assign Web Alert information to folders and content items which, when published, trigger emails. For each folder or content item to which you assign subscriptions, determine <ul style="list-style-type: none"> • activities that trigger emails (for example, only upon initial publication of content) • the content of the email • the subscription list(s) to whom the email is sent 	"Assigning Web Alert Information to Folders and Content" on page 182
5. Create and publish site visitor registration page.	Create a new Web form and drop the membership server control onto it. Then, publish that form on your Web site. Note: This task is typically done by a developer.	Developer's Manual > "Introduction to Ektron CMS400.NET Server Controls" > "Membership Server Control"

Step	Description	For more information, see
6. Site visitors subscribe to lists of interest.	Someone signs up to be notified when changes in a selected subscription (category) are published on your Web site.	"How Users Sign up for Subscriptions" on page 189
7. CMS users can also subscribe.		"CMS User Subscription Sign Up" on page 193
8. Subscribers are automatically notified when content is updated.	Web content is either first published or updated. If at least one subscription is assigned to the content or its folder, email is sent according to pre-defined criteria for the folder.	

Setting Up the Message Queue and Asynchronous Processor

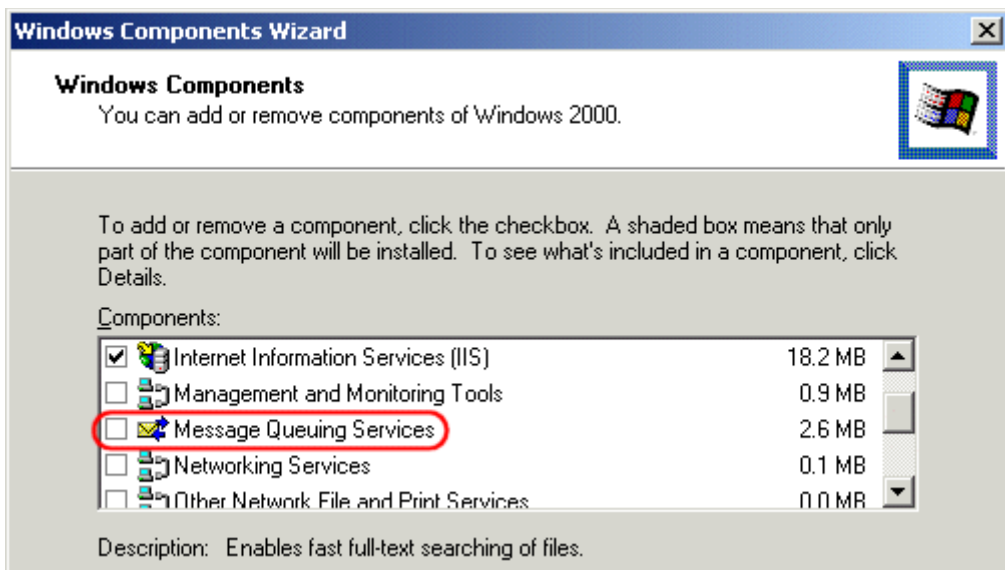
After installing **Ektron CMS400.NET** version 5.1 or higher, you need to set up the Microsoft Message Queuing and the Ektron Asynchronous Processor. It is assumed that the following directories and files are installed on your server:

- C:\Program Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\
- C:\inetpub\wwwroot\CMS400Example\bin\EktronAsyncProcessorWS.dll
- C:\inetpub\wwwroot\CMS400Example\Workarea\webservices\EktronAsyncProcessorWS.asmx

NOTE

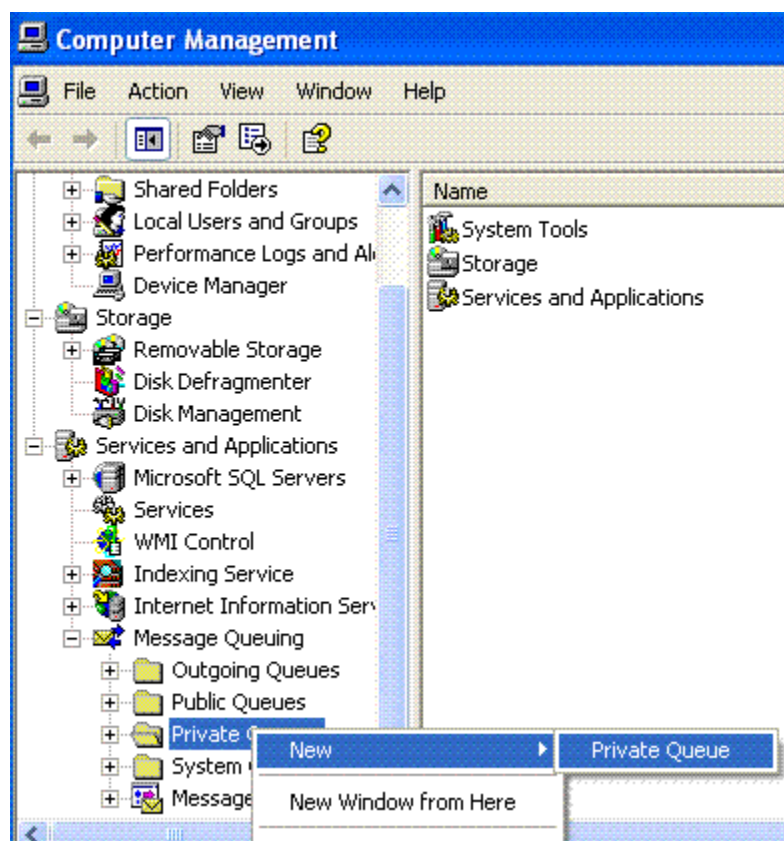
If you need to move Web services file, use the **Asynchronous Processor Location** field in the Configuration > Setup screen to specify the new folder location.

1. On the server that hosts **Ektron CMS400.NET**, go to **Control Panel > Add/Remove programs > Add/Remove Windows Components**.
2. Enable **Message Queuing Services**.

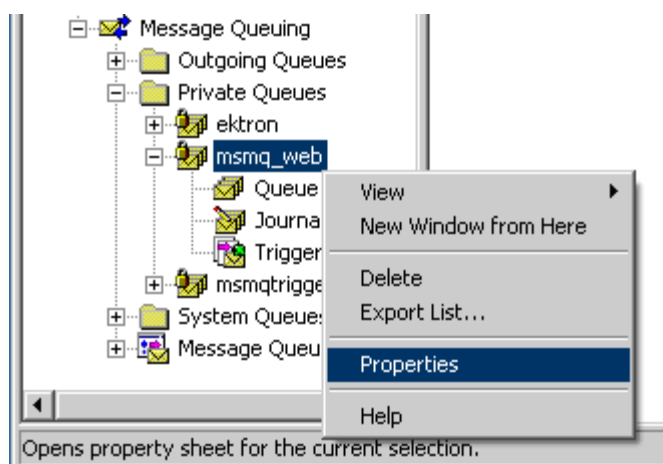


NOTE [Note: On Windows 2003, it is within the Application Server Components group.](#)

3. Go to **Control Panel > Administrative Tools > Computer Management > Services and Applications > Message Queuing**.
4. Right click the Private Queues folder and add a private queue named `msmq_web`.



5. Right click `msmq_web` and select Properties.



6. Go to the **Security** tab. You can give the Everyone group Full Control if you are in a testing environment. If you are on a production server or just want more security, give the local system account (the account which the EktronAsyncProcessor Service runs as) the following permissions:

- Delete
- Receive Message
- Peek Message
- Send Message

Give the ASP.NET account (the account that the Web services interface runs as) Send Message permission.

7. Click OK.
8. Open the following file:

```
C:\Program
Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\RegEktron.S
ervices.EktronAsyncProcessor.bat
```

9. Review and update as necessary the paths to the .NET directory and Ektron.Services.EktronAsyncProcessor.exe file.

WARNING!

Update the paths to the .NET Directory and the .exe file if necessary.

10. Execute the .bat file.

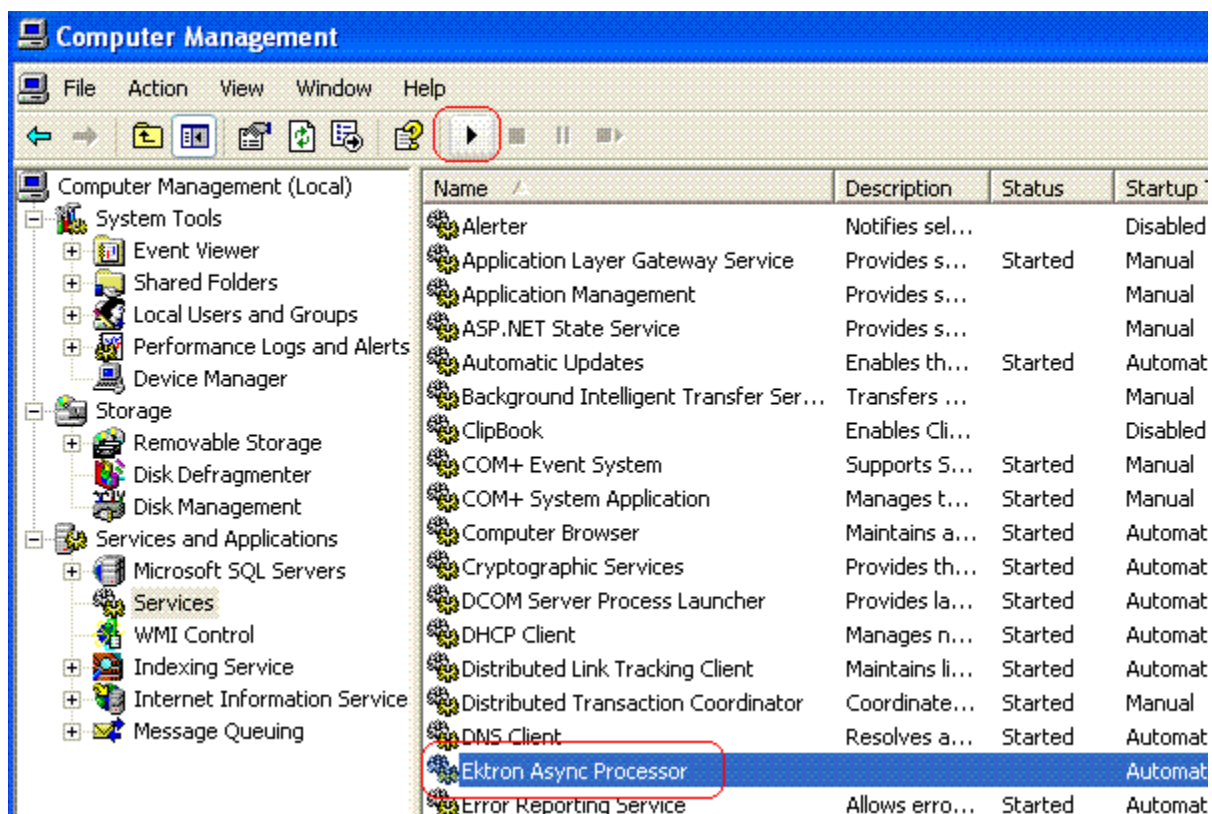
Or, from a command line or **Start Menu > Run**, enter:

```
C:\Windows\Microsoft.NET\Framework\v1.1.4322\installutil
"C:\program
Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\Ektron.Serv
ices.EktronAsyncProcessor.exe"
```

11. Open the following file and enter your SMTP connection settings: C:\Program

```
Files\Ektron\CMS400v52\EktronAsyncProcessor_Service\Ektron.Serv
ices.EktronAsyncProcessor.exe.config.
```

12. Go to **Control Panel > Administrative Tools > Computer Management > Services and Applications > Services**. Start the **Ektron Async Processor Service**.



Asynchronous Log File Reporting

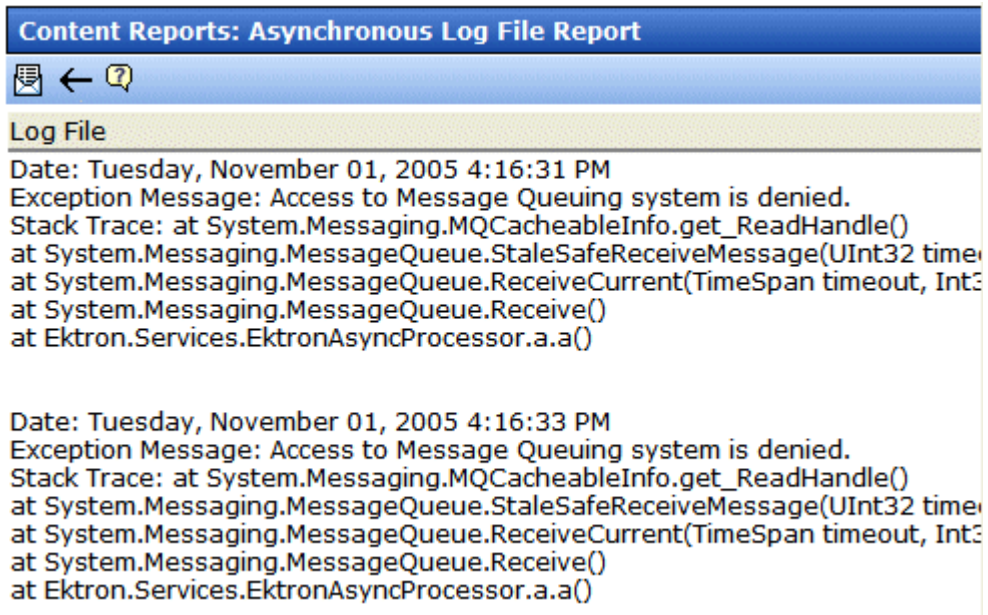
Once the Message Queuing and Asynchronous Process are set up and running, you can access a log report about the Asynchronous process. This report shows any problems with the Asynchronous Processor.

In addition to viewing the report, you can email it to any CMS400.NET user. For an explanation of emailing a report, see the User Manual section “Content Workflow Reports” > “Common Report Topics” > “emailing Reports”.

To access the Asynchronous Process log, follow these steps.

1. In the **Workarea’s Smart Desktop**, click the Reports folder.
2. Click the Asynchronous Log File link.

3. Any problems appear on the screen.



Creating the email Message

This section has the following topics.

- ["Predefining Message Components" on page 173](#)
- ["Combining Message Components to Create the Message" on page 176](#)
- ["Previewing the email Message" on page 177](#)

Predefining Message Components

Before you can create an email message, define the following information.

- default message text
- opt out message
- unsubscribe message
- "from" address

You can define as many as you want of each item. You must, however, define at least one opt-out message, unsubscribe message, and “from” address to use the Web Alert feature.

These message components are later inserted into an email message that is sent to your subscribers. See Also: ["Creating the email Message" on page 173](#)

Creating Default Message Text

You can create one or more default messages to contain the text of the email. A simple editor lets you apply some XHTML formatting the message.

Including Variables in the Default Message

The default message can include variables that retrieve information about the content and display it in the message text. The variables are surrounded by at signs (@). For example



The following content was recently updated: @AppContentLink@

In the email, this text might read:

The following content was recently updated: The Effect of Coumadin on Cardiac Patients

To see a complete list of variables that can be inserted into the default message, see the **Ektron CMS400.NET** Setup manual > “Customizing **Ektron CMS400.NET**” > “Variables.”

To create default message text, follow these steps.

1. In the Workarea, go to **Settings > Configuration > Web Alerts > Messages**.
2. Click the Add button (.
3. Enter a title that describes the message.
4. At the **Type** field, select **DefaultMessage**.
5. In the editor, enter the message text.
6. Click the Save button (.



Creating Opt Out Message Text

An Opt-Out message appears as the first line of every email. It directs the reader to the Unsubscribe message at the bottom. Here is an example:

You have subscribed to receive alerts from the Ektron CMS400.NET email alert system. See below for removal instructions.

You can add variables to the Opt Out text. See Also: ["Including Variables in the Default Message" on page 174](#)

To create Opt-Out message text, follow these steps.



1. Go to **Settings > Configuration > Web Alerts > Messages**.
2. Click the Add button (.
3. Enter a title that describes the Opt-Out message.
4. At the **Type** field, select **OptOut**.
5. In the editor, enter the message text.
6. Click the Save button (.

Creating Unsubscribe Message Text

An Unsubscribe message lets the person receiving the email remove himself from the subscription list.



You can add variables to the Unsubscribe text. See Also: ["Including Variables in the Default Message" on page 174](#)

To create Unsubscribe message text, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Messages**.
2. Click the Add email Message button (.
3. Enter a title that describes the Unsubscribe message.
4. At the **Type** field, select **Unsubscribe**.
5. In the editor, enter the message text.
6. Click the Save button (.

Creating “From” Addresses

Any email generated by the Web Alert feature must have a “from” address. To create one or more “from” addresses, follow these steps.


1. Go to **Settings > Configuration > Web Alerts > Email From List**.
2. Click the Add email From Address button ()
3. Enter an email address that will be used in the From field of messages generated by the Web Alert feature.
4. Click the Save button ()

Combining Message Components to Create the Message

You create the content of an email message by configuring the following components. Some are required. Then, when content is published, **Ektron CMS400.NET** retrieves the field values to create the email Web Alert.

NOTE To set or modify this information, you must have permission to edit the folder.

Component	Comment	Required?
1. Subject line	Plain text you enter on the Web Alerts tab of the Folder Properties screen	No
2. From address	See "Creating “From” Addresses" on page 176	Yes
3. Opt out message	See "Creating Opt Out Message Text" on page 175	Yes
4. Default message	See "Creating Default Message Text" on page 174	No
5. Content Summary	<p>The Summary of the content item whose creation or change generates the email.</p> <p><u>Note: The Summary can include variables that retrieve information about the content item. See "Including Variables in the Default Message" on page 174</u></p>	No

Component	Comment	Required?
6. Any CMS content item	<p>Identify CMS content to include within the email content.</p> <ul style="list-style-type: none"> To identify an existing content item, click Select next to the Use Content checkbox. Then, navigate to the content item. <hr/> <p><u>Note: If the content item is an Office document or a managed file, a <i>link</i> to that item appears within the email message, not the item itself.</u></p> <hr/> <ul style="list-style-type: none"> To insert this content item (that is, the one whose creation or change triggers this Web Alert), click Use Current. To create a new content block to insert into this message, click Select next to the Use Content checkbox. When the folder navigation window appears, click the Add Content button (). Then, see "Adding HTML Content" on page 50. 	No
7. Unsubscribe message	See "Creating Unsubscribe Message Text" on page 175	Yes

The elements appear within the email in the sequence shown above.

Previewing the email Message

You can preview the email message at any time by clicking the preview button, which appears to the right of the **Web Alert Contents:** label on the Web Alerts tab (see below).

Edit Content in Folder "Content"

Title: [English (U.S.)]

[Content](#)
[Summary](#)
[Metadata](#)
[Schedule](#)
[Comment](#)
[Web Alerts](#)


Web Alert Options:

☒ Notify Always
☐ Suspend Next Notification (Override)
☐ Notify Only on Initial Publication
☐ Send Next Notification (Override)
☐ Notify Never

Web Alert Subject:

Web Alert Email From Address:

▼

Web Alert Contents:  **Web Alerts preview**

☒ Opt Out Message

The button appears on the Web Alerts tab for folders as well as content.

When you click the preview button, a new window displays the body of the email message. (The components used in an email message are listed in ["Combining Message Components to Create the Message" on page 176.](#))

After previewing the message, you can change any message components and click the button again to review the updated message. You don't need to save or check in the content to update the preview.

Defining Subscriptions


Create a subscription for each type of information site visitors might want to be notified about. For example, if your site sells electronics, you could set up one subscription for televisions, another for computers, and a third for stereo equipment. Site visitors can then subscribe to appropriate areas of interest.

CMS and membership users can also sign up for subscriptions.

To create one or more subscriptions, follow these steps.

1. Go to **Settings > Configuration > Web Alerts > Subscriptions**.
2. Click the Add Subscription button (shown below).



3. Enter a name for the subscription. The name should indicate the kind of information that it will cover.
4. Use the **Enabled** check box to indicate if the subscription is currently active.
5. Press the Save button ().

Effect on Custom User Properties

When you create the first subscription, a new entry is automatically created in the Custom User Properties screen. By default, its name is **Subscriptions**, and its type is **Category**. This occurs because all custom user properties appear on the Site Visitor Registration screen. In this way, users visiting that page can select areas of interest about which to be notified when content is updated.

The default name (**Subscriptions**) appears on the Site Visitor Registration screen. You may want to change it to something more helpful, such as **Select Areas of Interest**. To do this, select the Subscriptions entry and edit the **Label** field in the Custom User Properties screen.

The following graphic illustrates the relationship among the Subscriptions, Custom Properties, and Site Visitor Registration screens.

View All Subscriptions

View: English (U.S.)

Subscription Name	ID	Enabled	Language
<u>Automobiles</u>	10	<input checked="" type="checkbox"/>	1033
<u>Motorcycles</u>	12	<input checked="" type="checkbox"/>	1033
<u>Trucks</u>	11	<input checked="" type="checkbox"/>	1033

View Custom Properties

English (U.S.)

Title	Type	Required
<u>Check areas of interest</u>	Category	<input checked="" type="checkbox"/>

First Name: John

Last Name: Edit

Password: ●●●●

Confirm Pwd: ●●●●

E-Mail Address: jedit@ektrron.com

☒ Automobiles

☒ Motorcycles

☐ Trucks

*Check areas of interest

Notification will send in la

Register Reset

If you add more subscriptions later, they have no effect on the **Subscriptions** entry in the Custom User Properties screen -- that single entry covers all subscriptions.



Using Subscriptions in a Multi-Language System

When you create a subscription, a version of it is created for every enabled language in your system. You can edit the subscription name and **Enabled** values for any language but the ID number cannot be changed.



The screenshot shows a window titled "Edit Subscription 'Automobiles'". Below the title bar, there are three icons: a floppy disk (Save), a left arrow (Back), and a speech bubble (Help). The main area contains three fields: "Subscription Name:" with a text box containing "Voitures", "ID" with a text box containing "10", and "Enabled" with a checked checkbox.

To translate any subscription, follow these steps.

1. Go to **Settings > Configuration > Subscriptions**.
2. From the View Languages dropdown list, select the language into which you want to translate the subscription.
3. Click the subscription that you want to translate.
4. Click the Edit button ()
5. Enter the translation for the subscription name. If desired, you can check or uncheck the **Enabled** checkbox. Only enabled subscriptions appear on the Site Visitor Registration screen.
6. Click the Save button ()

Assigning Web Alert Information to Folders and Content

After creating predefined messages (as explained in ["Predefining Message Components" on page 173](#)) and subscriptions (as explained in ["Defining Subscriptions" on page 179](#)), you need to identify which folders include content that, when updated, trigger a Web Alert. For example, new product announcements are placed in the Marketing folder.

NOTE

In order to set or modify Web Alert information, you must have permission to edit the folder.

For each folder, you can assign the following kinds of message information.

- whether Web Alert information is *inherited* from a parent folder or customized
- whether a folder's Web Alert information is inherited by all content items in the folder
- *when* email is sent: always, only on initial publication, or never
- the *content* of the Web Alert email
- the subscriptions assigned to the folder. These determine which recipients receive email when content in this folder is created or updated.


Customizing Web Alert Information for a Folder

Like other folder-level information in **Ektron CMS400.NET**, Web Alert information is inherited from a parent folder. By default, all folders inherit these settings from the root (Content) folder.

However, inheritance can be broken and customized at any folder level or even the content level. Breaking inheritance means that custom settings can be made at any folder level. Subsequent changes to Web Alert settings at the parent level are ignored.

See Also: ["Assigning Web Alert Information to Content" on page 186](#)


To view, enter, or modify folder-level Web Alert information, follow these steps.

1. Navigate to the folder whose Web Alert information you want to edit.
2. Click the Folder Properties button ()
3. Click the **Web Alerts** tab.
4. Scroll down to view the Web Alert options.

Properties **Metadata** **Web Alerts****Web Alert Settings:**☐ Break Inheritance**Web Alert Options:**

- ☒ Notify Always
☐ Notify Only on Initial Publication
☐ Notify Never

Web Alert Subject:**Web Alert Email From Address:****Web Alert Contents:**☒ Opt Out Message☐ Use Default Message☐ Use Summary☐ Use Content☒ Unsubscribe Message**Available Web Alerts:****Assigned Name**☐ Automobiles

5. To change any value, click the Edit Properties button ().
6. The following table describes the fields.

Web Alert Fields

Field Group	Description
Web Alert Settings: Break Inheritance	To inherit Web Alert settings (described below) from this folder's parent folder, leave this box (Break Inheritance) empty. To assign custom Web Alert settings for this folder, check this box and use the fields below to customize the settings.
Web Alert Options	Check <i>when</i> Web Alert emails are sent as content in this folder is published. <ul style="list-style-type: none"> • Notify Always - send email whenever any content is published. It doesn't matter if the content is being published for the first time or being updated. • Notify only on Initial Publication - send email the first time content is published. After that, email is not sent. • Notify Never - email is never sent for content in this folder.
Web Alert Subject	Enter the subject line of the email.
Web Alert email From Address	Select the address of the person from whom the email will be sent. See Also: "Creating "From" Addresses" on page 176
Web Alert Contents	Check any or all of the following components to determine the text of the email. See Also: "Combining Message Components to Create the Message" on page 176 <ul style="list-style-type: none"> • OptOut Message - see "Creating Opt Out Message Text" on page 175 • Use Default message - see "Creating Default Message Text" on page 174 • Use Summary - include the content summary in the email • Use Content - see "Any CMS content item" on page 177 • Unsubscribe message - See "Creating Unsubscribe Message Text" on page 175 <p>The components appears within the email in the order listed above.</p>

Field Group	Description
Available Web Alerts	<p>All enabled subscriptions set up in the Subscriptions screen appear. Check those to be notified when content in this folder is added or updated.</p> <p>See Also: "Defining Subscriptions" on page 179</p> <hr/> <p>Note: If you uncheck all subscriptions, you disable the Web Alert feature for this folder and all of its content. This applies even if unique subscription information has been assigned to content items within the folder.</p> <hr/>

Assigning Web Alert Information to Content


You can customize Web Alert settings for any content item. If you do, you break the inheritance from its folder. This means that any subsequent changes to the folder settings do not affect the content's Web Alert settings. From then on, its settings are independent of the folder's settings.

See Also: ["Web Alert Feature" on page 162](#)

EXCEPTION!

If *all subscriptions* are unchecked for a folder, the Web Alert feature is disabled for all content in the folder. This applies even if unique Web Alert information has been assigned to content.

To customize the Web Alert settings for any content item, follow these steps.

1. Navigate to the content item.
2. Click the Edit button (.
3. Click the **Web Alerts** tab.

NOTE

The Web Alerts tab only appears if required messages, "from" email addresses, and at least one subscription are assigned to the content's folder.

4. The Web Alert settings for the content appear.

[Content](#)
[Summary](#)
[Metadata](#)
[Schedule](#)
[Comment](#)
[Web Alerts](#)

Web Alert Options:

- ☒ Notify Always
 - ☐ Suspend Next Notification (Override)
- ☐ Notify Only on Initial Publication
 - ☐ Send Next Notification (Override)
- ☐ Notify Never

Web Alert Subject:

Web Alert Email From Address:

bob.bolt@ektron.com ▼

Web Alert Contents:

- ☒ Opt Out Message

Opt out Message ▼
- ☐ Use Default Message

default ▼
- ☐ Use Summary
- ☐ Use Content Select
- ☒ Unsubscribe Message

unsubscribe msg ▼


Available Web Alerts:

Assigned Name

The following table describes the settings.

Field Group	Description
Web Alert Options	<p>Check <i>when</i> Web Alert emails are sent as this content is published.</p> <ul style="list-style-type: none"> • Notify Always - send email whenever content is published. It doesn't matter if the content is being published for the first time or being updated. • Suspend Next Notification (override) - Check this box if you want to suspend the next email to be sent for this content. You might use this feature if you notice a small error in the content and don't want to notify all subscribers that the page was updated. <hr/> <p>Important! - This setting only applies until the next time this content is published. When that happens, this box is automatically unchecked.</p> <hr/> <ul style="list-style-type: none"> • Notify only on Initial Publication - send email the first time content is published. After that, email is not sent. • Send Next Notification (override) - Send an email to all subscribers the next time this content is published. Use this checkbox to send a one-time mailing to all subscribers about content that has already been published. <hr/> <p>Important! - This setting only applies until the next time this content is published. When that happens, this box is automatically unchecked.</p> <hr/> <ul style="list-style-type: none"> • Notify Never - email is never sent when content in this folder is published.
Web Alert Subject	Same as for a content folder. See " Web Alert Subject " on page 185
Web Alert email From Address	Same as for a content folder. See " Web Alert email From Address " on page 185
Web Alert Contents	Same as for a content folder. See " Web Alert Contents " on page 185
Available Web Alerts	Only Web Alerts assigned to the folder appear. Check ones that you want to assign to this content item. For more information, see " Available Web Alerts " on page 186.

Inheriting Content-Level Web Alert Information from Its Folder

If you customized Web Alert information for content items and later decide to standardize that information for all content in a folder, use the Restore Web Alert Inheritance toolbar button ()

This button copies folder-level Web Alert information to every content item in the folder, replacing whatever content-level information exists. In this way, all content in a folder will have the same Web Alert information.

How Content that is Dragged and Dropped is Handled

Web Alert emails are not generated for files that are dragged and dropped into **Ektron CMS400.NET** and immediately published. To generate email for these files, you must manually publish them.

Like HTML content, these files must reside in a folder for which the Web Alert feature is enabled.

How Users Sign up for Subscriptions

Once subscriptions are set up, you create a page on your Web site to let site visitors subscribe to areas of interest. An example of that page is below.

NOTE	<hr/> <div>The email address collected on the screen is used for the membership Username field.</div> <hr/>
-------------	--

First Name:

Last Name:

Password:

Confirm Pwd:

E-Mail Address:

☐ Automobiles

☐ Motorcycles

*Check areas of interest ☐ Trucks

Notification will send in language: English (U.S.)

What happens next depends on the **Enable Verify email** check box in the Application Setup screen (shown below).

☒ Enable Verify Email

(The CMS will verify all new membership users by sending them an email that asks them to confirm registration.)

What Happens if Verification email is Not Used

If the **Enable Verify email** checkbox is *not* checked, everyone who signs up automatically becomes a membership user.

What Happens if Verification email is Used

Typically, when managing a self-subscribe list, you want new users to confirm their interest in being on the list. This prevents people from being subscribed by someone else without their permission.

If the **Enable Verify email** checkbox *is* checked, everyone who signs up is placed on the Users Not Verified list. (To see this list, go to **Workarea > Modules > Memberships > Users Not Verified.**)

These people then receive an email. You define the content of this email in **Workarea > Modules > Memberships > User Groups > Messages**. The email should direct the unverified user to a new Web page that asks him to confirm his interest in signing up for the subscription. (See "[The Verification Message](#)" on page 191.) New users are activated when the subscriber confirms his interest.

To create such a page, your Web developer creates or updates a Web Form using the Membership Server Control. For this purpose, set the control's **DisplayMode** property to **AccountActivate**.

NOTE

Users can also be manually activated or removed via the [View Not Verified Users](#) screen. For more information, see "[The View Not Verified Users Screen](#)" on page 192.

The Verification Message

By default, **Ektron CMS400.NET** supplies a generic message asking the user to confirm his password and directing him to the `acitvatemyaccount.aspx` page on your Web site. If you want to customize that message, follow these steps.

1. Go to **Workarea > Modules > Memberships > User Groups Messages**.
2. Create the text of the confirmation message you want the subscriber to receive. Be sure to place a link to the confirmation page. After the URL of that page, you must add this text: `@appQuery@`. For example:

Welcome to Ektron.Com. You have registered to be notified of updates to our site.

Before we can do this, you need to activate your account. To do so, please visit <http://www.ektron.com/workarea/activateuser.aspx@appQuery@>.

If you want the message to include the user's name and email address, use the following variables to retrieve that information:

- name - @appEmail@
- email address - @appActivateId@



For example:

Your user name is @appEmail@.

Your account id is @appActivateId@

The View Not Verified Users Screen

All users who have signed up for a subscription but who have not yet verified that subscription appear on the View Not Verified Users Screen. This screen is available via **Modules > Memberships > Users not Verified**.

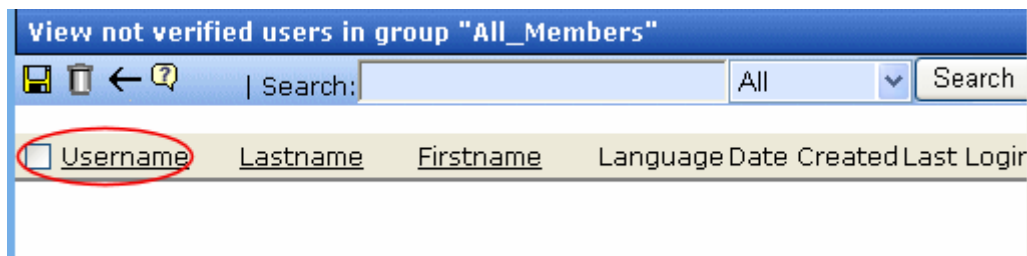
After viewing membership users on the screen, you can manually activate their account. To do so, selecting one or more users then click the Activate button (). Alternatively, you can delete members by selecting one or more and clicking the Delete button ().

NOTE The `ek_PageSize` setting in the `web.config` file determines the maximum number of users that can appear on a page before it “breaks.” When a page breaks, additional entries appear on another screen, and the following text appears near the bottom of the list:

Page 1 of 2

[\[First Page\]](#) [\[Previous Page\]](#) [\[Next Page\]](#) [\[Last Page\]](#)

To select all members, click the check box in the header line, next to **Username** (circled below).



You can also change the way membership users are sorted, or use the **Search** button to find users that match your criteria (for

example, users whose username includes *yahoo.com*.) These features are explained in "[Sorting Membership Users](#)" on page 134 and "[Searching for Membership Users](#)" on page 135.

Setting up Other Web Pages for Site Visitor

You can set up other Web pages that let the subscriber perform the following actions:

- Activate their account
- Reset their password
- Unsubscribe

To create these pages on your web site, place the membership server control on the page. Then use the control's **DisplayMode** property to determine the kind of screen you want to place. For example, to create a screen that lets the user reset his password, set the Membership server control's **DisplayMode** property to **ResetPassword**.

For more information, see the documentation for the Membership server control in the **Ektron CMS400.NET Developer's Manual**.




CMS User Subscription Sign Up

CMS users can also subscribe to any subscription list. This would be particularly useful on an intranet where, for example, employees are notified when job-related information is updated.

Another example would be for your internet site. The manager of the Marketing Department could sign up to be notified whenever Marketing content is added or updated.

To do so, users go to **Settings > User Profile > Edit User** (see illustration).

Edit User "Admin"

Username:	<input type="text" value="Admin"/>
First Name:	<input type="text" value="admin"/>
Last Name:	<input type="text" value="admin"/>
Password:	<input type="password" value="••••••••"/>
Confirm Pwd:	<input type="password" value="••••••••"/>
User Language:	<input type="text" value="App Default"/> ▼
E-Mail Address:	<input type="text" value="admin@ektron.com"/>

☐ **Disable Receiving of System Notification Email**
(System notification sending email is currently disabled)

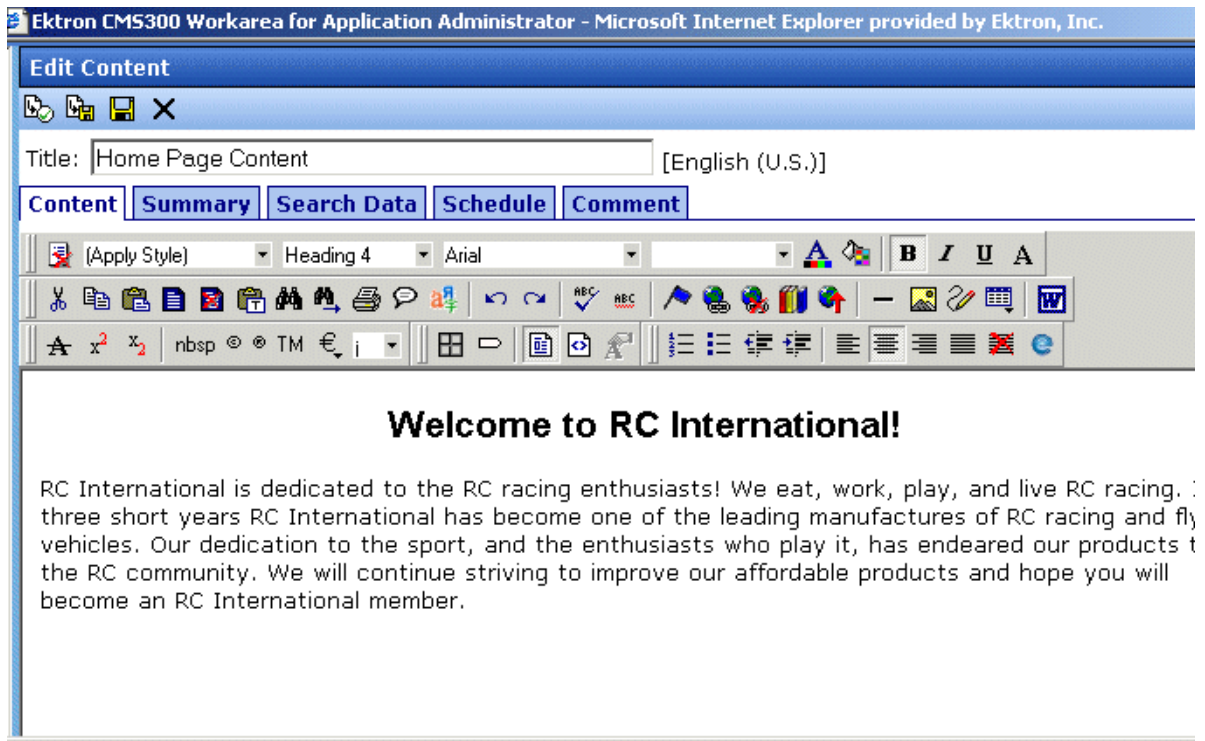
Subscriptions

☒ Automobiles

Notification will send in language: English (U.S.)

Using eWebEditPro

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



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

Managing XML

WARNING!

The functionality described in this section is not supported when using an Apple Macintosh for editing content.

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

Using XML with Ektron CMS400.NET provides the following benefits:

- Strictly enforce content and page layout with Ektron's editor (Ektron eWebEditPro+XML), XSLT, and WYSIWYG templates for content contributors
- Deliver content to multiple devices (e.g., PDAs, mobile phones, WEB TV)
- Easily share content across B2B transactions
- Advanced XML authoring: Ektron's highly-acclaimed XML editor—Ektron eWebEditPro+XML—lets developers hide XML tags from content contributors and provides an easy-to-use WYSIWYG editing interface

XML configurations are used in Ektron CMS400.NET to define the necessary files to display, save, and validate the content properly.

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

What's in This Chapter?

Here is what's covered in this chapter.

- ["Before You Manage XML Configurations" on page 197](#)

- ["Adding a New XML Configuration" on page 199](#)
- ["Assigning XML Configurations" on page 204](#)
- ["Viewing XML Configurations" on page 207](#)
- ["Editing XML Configurations" on page 212](#)
- ["Editing Data Design Packages" on page 212](#)
- ["Creating XML Configurations Based on Existing Configurations" on page 215](#)
- ["Viewing Data Designer XSLTs" on page 216](#)
- ["Deleting XML Configurations" on page 217](#)
- ["XML Indexing" on page 219](#)

Before You Manage XML Configurations

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


There are two ways to create an XML configuration.









- Using external XML files
- Using the WYSIWYG Data Designer

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

The XML Configuration Toolbar

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


Button	Name	Description	More Information
	Add XML Configuration	Create a new XML configuration or create a new XML configuration based on the properties of an existing one.	"Adding a New XML Configuration" on page 199

Button	Name	Description	More Information
	Back	Return to previous screen	
	Configure Full Text Search	Edit search screen labels	"Editing the Search Labels" on page 227
	Delete	Delete an XML configuration	"Deleting XML Configurations" on page 217
	Edit	Edit an XML configuration created with external files	"Editing XML Configurations" on page 212
	Edit Data Design	Edit an XML configuration created with the Data Designer	"Editing Data Design Packages" on page 212
	Save	Save changes	
	Update	Save and update changes	
	View XSLT	Display the XSLT for an XML configuration	"Viewing Data Designer XSLTs" on page 216

Accessing XML Configurations

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

1. Access your Workarea, as described in ["Accessing the Workarea" on page 10](#).
2. In the folder tree on the left side of the Workarea, follow the path **Settings > Configuration > XML Configuration**.
3. The View XML Configurations screen is displayed.

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

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

- See Also: ["Managing XML" on page 196](#)

Adding a New XML Configuration



When adding a new XML configuration, you have two options. The following sections explain both.

- ["Adding an XML Configuration Using the Data Designer" on page 199](#) (recommended)
- ["Adding an XML Configuration Using External XML Files" on page 201](#) (for example, XSLTs, schemas, etc.)

Note [To create a new XML configuration by copying and editing an existing one, see "Creating XML Configurations Based on Existing Configurations" on page 215.](#)

Adding an XML Configuration Using the Data Designer

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

1. Access the XML Configurations screen, as described in ["Accessing XML Configurations" on page 198](#).
2. Click the Add XML Configuration button (.
3. The Add XML Configuration screen is displayed.
4. Enter a **Title** for the XML configuration.
5. Click the Save button (.

6. The XML Configuration Data Designer screen appears.

Title: Job Postings

Select a style sheet that you wish to apply for this design

-- Select a style sheet --

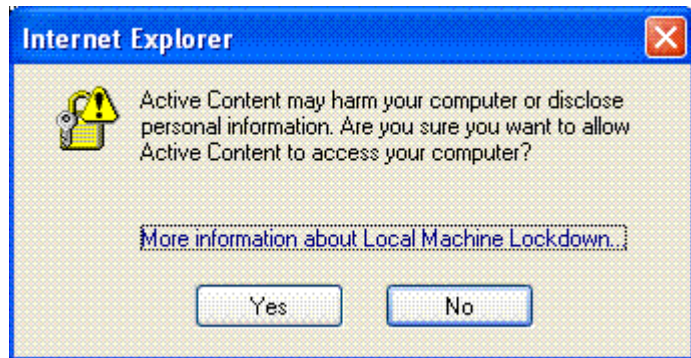
Job Title:

Job Number:


Description:

The successful candidate must possess following attributes:

7. You may get the following error dialog.




To learn about why the dialog is appearing and help decide whether to click **Yes** or **No**, click the link **More information about Local Machine Lockdown**. A Windows Help topic appears and explains your options.



8. If desired, you may specify a style sheet for the XML configuration. Use the field on the right above the editor.
To do so, either type the path and file name of the CSS file, or select an Ektron CMS400.NET-registered style sheet from the drop down list.
9. Design your XSLT in the Data Designer.
See ["Using the Data Designer" on page 228](#) for information about creating XSLTs using the Data Designer.
10. Click the Update button ().

You are ready to assign the XML configuration to a folder or content item. See ["Assigning XML Configurations" on page 204](#) for more information.

Adding an XML Configuration Using External XML Files


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

1. Access the XML Configurations screen, as described in ["Accessing XML Configurations" on page 198](#).
2. Click the Add XML Configuration button ().

3. The Add XML Configuration screen is displayed.
4. Enter a **Title** for the XML configuration.
5. Click the Save button ().
6. The XML Configuration Data Designer screen is displayed.
7. Click the Back arrow () to exit.
8. The View XML Configuration screen for the new XML configuration is displayed.



Properties	Display Information	Preview
Title:	Testing using external XML files	
ID:	20	
Description:		
Editor Information:		
Edit XSLT:		
Save XSLT:		
Advanced Configuration:		
Validation Information:		
XMI Schema:		

9. Click the Edit button ().
10. The Edit XML Configuration screen is displayed.
11. Enter the necessary information using the following table as a reference.

XML Configuration Fields



Section	Field	Description
Generic Information	Title	Name given to XML configuration.
	ID (display only)	ID number assigned when configuration is created.
	Description	Detailed description given to configuration by its creator or last editor.

Section	Field	Description
Editor Information	Edit XSLT	XSLT applied to content while being edited.
	Save XSLT	XSLT used to transform the XML when saved to the database.
	Advanced Configuration	XML file that contains display information, schema validation, and other advanced XML data.
Validation Information	XML Schema	The .xsd file used to validate the XML content
	Target Namespace	The default namespace used for outgoing XML
Display Information	XSLT1	XSLT 1 applied to XML data when viewed on a device
	XSLT2	XSLT 2 applied to XML data when viewed on a device
	XSLT3	XSLT 3 applied to XML data when viewed on a device
	XSLT Packaged	XSLT package applied to XML data when viewed on a device

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


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

Default:

- ☐ **XSLT 1:** 
- ☒ **XSLT 2:** 
- ☐ **XSLT 3:** 
- ☐ **XSLT Packaged:**

13. Click the Save button ().



XML File Verification

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

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

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

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

Display	Result	Description
	Verified	The file passes all verification parameters
	Not Verified	<p>The file either:</p> <ul style="list-style-type: none"> • Does not exist in the location specified • Does not contain well-formed XML <p>Review current settings. Ensure the file is in the proper location, and that it contains well-formed XML</p>

Assigning XML Configurations

After you create an XML configuration, you can assign it to either content or a content folder. When assigned to a content folder, all content in the folder use that configuration.

Where Can XML Configurations be Assigned?



An XML configuration can be assigned in three locations.

Location in Ektron CMS400.NET	To assign an XML configuration to a	See Also
Edit Folder Properties screen	folder	"Folder Properties" on page 38
Add Subfolder screen	folder	"Adding Subfolders" on page 44
View Properties for Content screen	content	"Content Properties" on page 59

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

XML Configuration:

☐ Inherit XML Configuration

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

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

- ["Inheriting an XML Configuration" on page 205](#)
- ["Assigning a Different XML Configuration" on page 206](#)

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

Inheriting an XML Configuration

Content and folders can inherit XML configuration settings from their parent folders. To set inheritance, add a check to the **Inherit XML Configuration** check box.

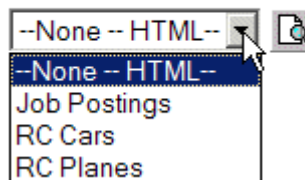
Assigning a Different XML Configuration

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

1. Access the XML configuration setting form, as described in ["Where Can XML Configurations be Assigned?" on page 205](#).
2. If the **Inherit XML Configuration** box is checked, remove the check by clicking the box.
3. Open the drop-down list to display available XML configurations.

XML Configuration for this content:




☐ Inherit XML Configuration



NOTE See ["Adding a New XML Configuration" on page 199](#) for more information about adding XML configurations.

4. Click the XML configuration you want to assign.

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

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

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


Assigning an XML Configuration to Content

See ["Adding XML Content" on page 50](#)

Viewing XML Configurations

To view an XML configuration, follow these steps.

1. Access the Workarea, as described in "[Accessing the Workarea](#)" on page 10.
2. In the folder tree on the left side of the Workarea, follow the path **Settings > Configuration > XML Configuration**.
3. Click the configuration you want to view.

View XML Configurations			
			
Title	ID	Date Modified	Last Editor
ek	5	4-2004-10 4:28:30	Administrator, Application
ektron sample	6	5-2004-10 1:46:55	Administrator, Application
Job Postings	3	1-2002-11 4:08:55	Administrator, Application
RC Cars	1	1-2002-11 4:08:19	Administrator, Application
RC Planes	2	1-2002-11 4:08:44	Administrator, Application

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









XML Configuration Created with...	
Data Designer	External Files
<div>View XML Configuration "Physician Profiles"</div> <div> </div> <div> Properties Display Information Preview </div> <p>Title: Physician Profiles</p> <p>ID: 11</p> <p>Description:</p>	<div>View XML Configuration "Testing using external"</div> <div> </div> <div> Properties Display Information Preview </div> <p>Title: Testing using external</p> <p>ID: 20</p> <p>Description:</p> <p>Editor Information:</p> <p>Edit XSLT:</p> <p>Save XSLT:</p> <p>Advanced Configuration:</p> <p>Validation Information:</p>

The View XML Configuration screen has three tabs.

- "Properties Tab" on page 209
- "Display Information Tab" on page 212
- "Preview Tab" on page 211

Each tab is explained below.

After viewing, you can perform the following actions on the XML configuration.

Button	Name	Description	More Information
	Configure Full Text Search	Edit search screen labels	"Editing XML Configurations" on page 212
	Edit	Edit an XML configuration	"Editing XML Configurations" on page 212
	Edit Data Design	Open the Data Designer	"Editing Data Design Packages" on page 212
	Add XML Configuration	Create a new XML configuration or create a new XML configuration based on the properties of an existing one.	"Adding a New XML Configuration" on page 199
	View XSLT	Display the XSLT for an XML configuration	"Viewing Data Designer XSLTs" on page 216
	Delete	Delete an XML configuration	"Deleting XML Configurations" on page 217
	Back	Return to previous screen	
	View online help	View online help	"Accessing Online Help" on page 412

Properties Tab

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

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

- "Editor Information" on page 210
- "Validation Information" on page 210

Editor Information

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

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

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

Validation Information

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

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

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

Preview Tab

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

RC Planes

Product Name:

Description:

Specifications

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

Display Information Tab

The display information tab lists the XSLTs that are used when displaying XML in the respective environment.

Field	Description
XSLT1	Display XSLT 1
XSLT2	Display XSLT 2
XSLT3	Display XSLT 3
XSLT Package	Display XSLT Package (created using the Data Designer)

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

The asterisk (*) denotes the default XSLT for the XML configuration.

Editing XML Configurations

After creating an XML configuration, you can modify it when files defined in the configuration have changed.

Since there are two ways to create an XML configuration, there are two ways to edit one.

- ["Editing Data Design Packages" on page 212](#)
- ["Editing an XML Configuration Created with External Files" on page 214](#)

[Editing Data Design Packages](#)

Editing Data Design Packages

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


Before You Edit the Data Package!

Before editing an XML configuration data package, it is important to realize the effects of the modifications. If an XML data package is edited, all content to which the configuration is applied is updated. Information that was originally created may be lost, depending on the changes you make to the package.

To ensure that information is not lost, use the Create New XML Configuration Based on Existing XML Configuration option on the view XML configuration screen. See ["Creating XML Configurations Based on Existing Configurations" on page 215](#) for more information.

Editing a Data Design Package

To edit a data design package, follow these steps.

1. Access the View XML Configurations screen, as described in ["Accessing XML Configurations" on page 198](#).
2. Click the XML configuration you want to edit.
3. The View XML Configuration screen appears with a more detailed description of the configuration.
4. Click the Data Design Mode button () at the top of the screen.

5. The Edit Data Design Package screen displays the current package.

Title: Job Postings

Select a style sheet that you wish to apply for this design


-- Select a style sheet --

(Apply Style) Normal Times New Roman 3 (12 pt)


Job Title:


Job Number:

Description:

6. Make the necessary changes to the Data Design package in the editor. See ["Using the Data Designer" on page 228](#) for information about creating XSLTs using the Data Designer.
7. Click the Update button ().

Editing an XML Configuration Created with External Files

1. Access the View XML Configurations screen, as described in ["Accessing XML Configurations" on page 198](#).
2. Click the XML configuration you want to edit.
3. The View XML configuration screen is displayed.
4. Click the Edit button ().
5. The Edit XML Configuration screen is displayed.

6. Edit the necessary fields to update the XML configuration. See ["XML Configuration Fields" on page 202](#).
7. Click the Update button ()


Now, all content and folders that use the XML configuration take their properties from the updated configuration.

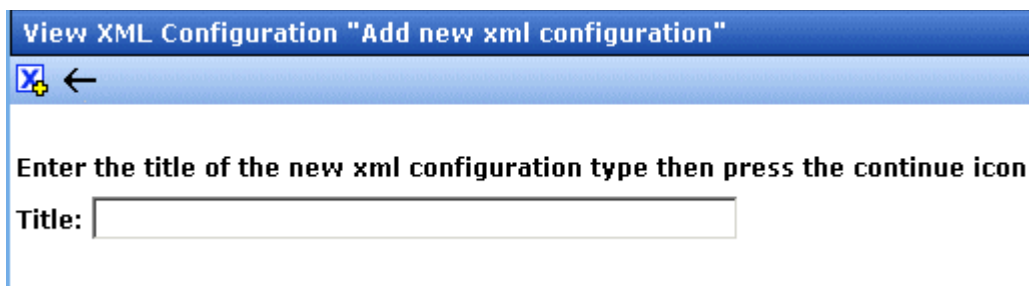
See Also: ["XML File Verification" on page 204](#)

Creating XML Configurations Based on Existing Configurations

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

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

1. Access the View XML Configurations screen, as described in ["Accessing XML Configurations" on page 198](#).
2. Click the XML Configuration you want to view.
3. The View XML Configuration screen appears with a more detailed description of the configuration.
4. Click the Create New XML Configuration button ()
5. The Add XML Configuration screen is displayed.




View XML Configuration "Add new xml configuration"

Enter the title of the new xml configuration type then press the continue icon

Title:

6. Enter a **Title** for the new configuration.

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

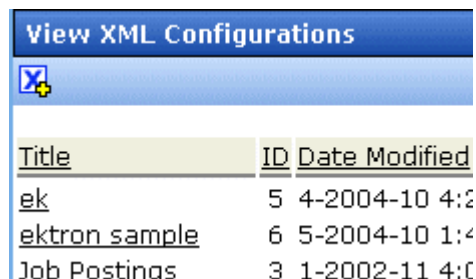
Viewing Data Designer XSLTs

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

If a display XSLT is not applied to an XML configuration, content is displayed using the default XSLT displayed in the View XSLT screen.

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


1. Access the View XML Configurations screen, as described in ["Accessing XML Configurations" on page 198](#).
2. Click the XML configuration whose XSLT you want to view.



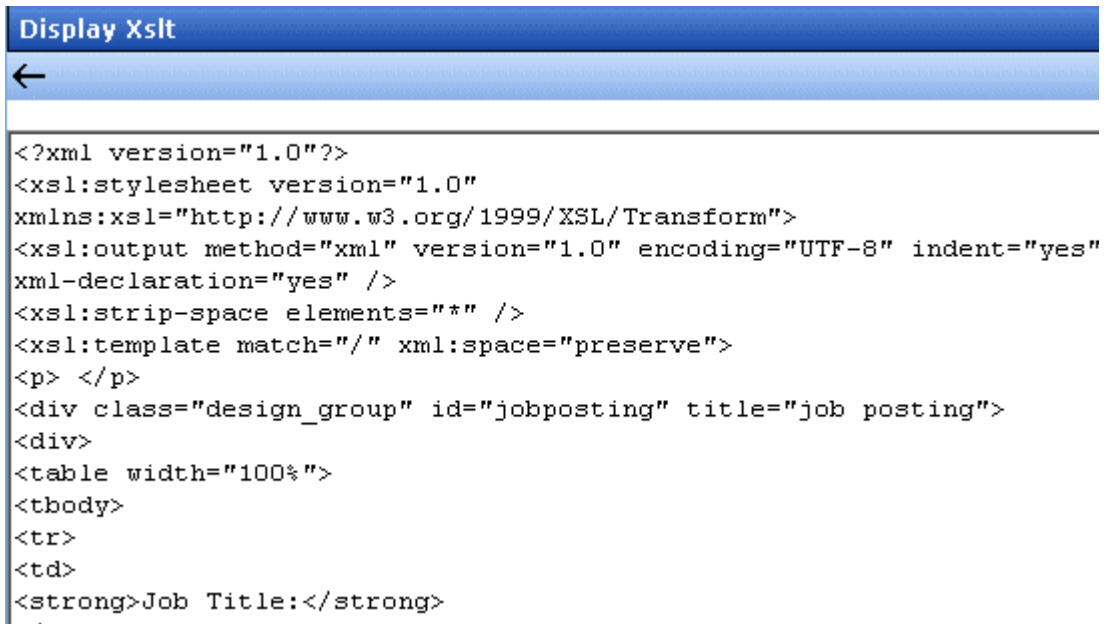
View XML Configurations		
Title	ID	Date Modified
ek	5	4-2004-10 4:2
ektron sample	6	5-2004-10 1:4
Job Postinas	3	1-2002-11 4:0

NOTE

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

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

5. The View XSLT screen is displayed.




```
<?xml version="1.0"?>
<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:output method="xml" version="1.0" encoding="UTF-8" indent="yes"
xml-declaration="yes" />
<xsl:strip-space elements="*" />
<xsl:template match="/" xml:space="preserve">
<p> </p>
<div class="design_group" id="jobposting" title="job posting">
<div>
<table width="100%">
<tbody>
<tr>
<td>
<strong>Job Title:</strong>
```

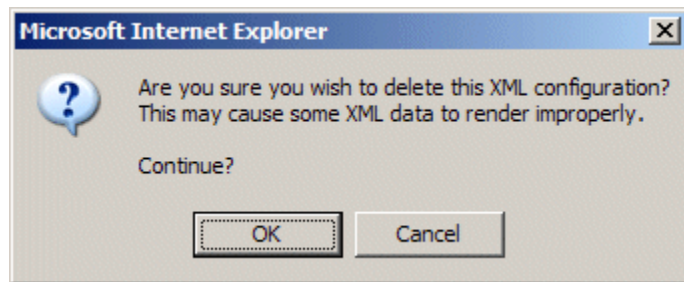
You can use this information to create your display XSLT.

Deleting XML Configurations

You can delete XML configurations that are no longer needed. To do so, follow these steps.

1. Access the View XML Configurations screen, as described in ["Accessing XML Configurations" on page 198](#).
2. Click the XML configuration you want to delete.
3. The View XML Configuration screen is displayed.
4. Click the Delete button ().

5. A confirmation message is displayed.



6. Click **OK**.

XML Indexing

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

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

NOTE

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

- ["User vs. Developer Selected Search Criteria" on page 219](#)
- ["Types of Search Criteria" on page 220](#)
- ["Displaying Search Results" on page 220](#)
- ["Setting up a User-Defined Search" on page 222](#)
- ["Setting up a Developer-Defined Search" on page 222](#)
- ["Specifying Which XML Elements are Indexed" on page 223](#)
- ["Search Dialog Setup" on page 224](#)
- ["Editing the Search Labels" on page 227](#)

User vs. Developer Selected Search Criteria

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

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

Types of Search Criteria

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

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

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


Displaying Search Results

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

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

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

[See Screen Sample](#)



[Home](#) | [Products](#) | [Support](#) | [News](#) | [Careers](#) | **[Search](#)** | [Calendar](#)

* *

[RC SAAB](#)

RC Internationalsoledst entry in to the competitive RC racing world is the f

[RC Sportster](#)

RC International's first entry in to the competitive RC racing world was the RC Sportster designed for the entry level RC enthusiast.

*

[RC Cheetah](#)

RC International's most successful entry in to the competitive RC racing world is the RC Che designed for the hard core RC enthusiast.

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

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

Industry	Use XML indexing to find
Health Care	A cardiologist whose practice is located in your city

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

Setting up a User-Defined Search

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

Step	For more information, see
1. Select an XML configuration	"Accessing XML Configurations" on page 198
2. For each field to be searched, assign indexing capability	"Specifying Which XML Elements are Indexed" on page 223
3. Set up the search screen	"Search Dialog Setup" on page 224 and "Editing the Search Labels" on page 227
4. Have your Web developer set up a page to display a search screen and a results screen	The Ektron CMS400 Developer's manual section "Standard ASP.NET Methods" > "IndexSearch" and "IndexSearchDisplay"

Setting up a Developer-Defined Search

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

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

Specifying Which XML Elements are Indexed

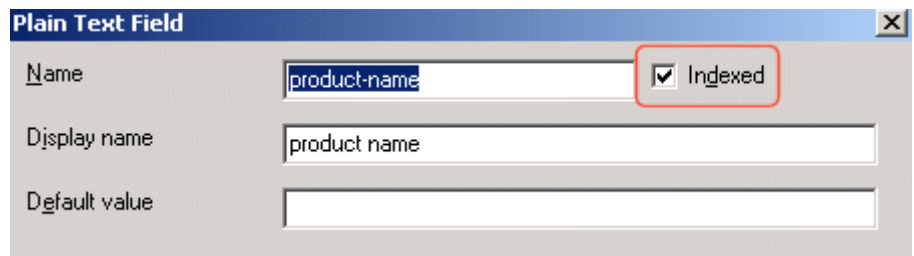
You can index the following types of fields:

- Checkbox
- Plain Text
- Choices
- List
- Calculated
- Calendar

[Learn How to Enable XML Indexing](#)

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

1. Select an XML configuration that you want to index. See *Also: "Accessing XML Configurations" on page 198*
1. Open its Data Design. See *Also: "Using the Data Designer" on page 228*
2. Move the cursor to the field you want to index.
3. Right mouse click on the field and choose **Field Properties**.
4. On the dialog box that appears, check **Indexed**.



The screenshot shows a dialog box titled "Plain Text Field" with a close button (X) in the top right corner. It contains three input fields: "Name" with the value "product-name", "Display name" with the value "product name", and "Default value" which is empty. To the right of the "Name" field, there is a checkbox labeled "Indexed" which is checked. A red rectangular box highlights the "Indexed" checkbox.

Validation

Validation ensures that the user completing the XML form enters the right type of data. You can decide if the user's input should be a number, boolean, date, string, zip code, etc. If you do not specify type attributes using validation data, the field is a string. See Also: ["Validation" on page 259](#)

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

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

Search Dialog Setup

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

NOTE

You can also edit the field labels using the Edit Index Search screen. However, on that screen, the **Dropdown** and **Multiple** checkboxes are not available. See Also: ["Editing the Search Labels" on page 227](#)

[See a Screen Sample](#)

XPath	Label
/root/products/product-name	Product Name <input checked="" type="checkbox"/> Dropdown <input checked="" type="checkbox"/> Multi
/root/products/specifications/length	Length
/root/products/specifications/mtbf	MTBF <input checked="" type="checkbox"/> Multiple
/root/products/specifications/datemanufactured	Date Manufactured

The information on this screen is explained below.

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


Screen section	Description
Label	<p>Enter the text that describes the field on the search screen. Below is an example of how the labels appear on the Search screen.</p> <div data-bbox="582 347 1046 647"> <p>Product Name <input type="text" value="No Selection"/> <input type="text" value="RC Cheetah"/></p> <p>Length <input type="text" value="No Selection"/></p> <p>MTBF <input type="text" value="No Selection"/></p> <p>Date Manufactured <input type="text" value="No Selection"/></p> <p><input type="button" value="Submit Search"/></p> </div> <p>If the field type is</p> <ul style="list-style-type: none"> • <i>checkbox</i>, a check box appears on the Search screen • <i>choices or list</i>, all values appear on the Search screen • <i>calendar</i>, the user can choose a specific date, any range of dates or beginning and end dates on the Search screen • <i>plain text</i> with a whole number specified in the validation criteria, the user can choose a specific number, any range of numbers or beginning and ending numbers on the Search screen • <i>plain text with no validation criteria</i>, the display is determined by the Dropdown and Multiple checkboxes (below). If Dropdown and Multiple are not checked, the search screen contains these values: <ul style="list-style-type: none"> - No Selection - Exact phrase - Contains
Dropdown	<p>If the field type is Choices or List, and you check this box, the user performing the search can choose from the choice or list values when selecting search criteria.</p> <p>If the field type is a plain text, and you check this box, the user performing the search can choose among any value stored in this field of the Data Design when selecting search criteria.</p>
Multiple	<p>Check this field if you want to allow the user performing the search to select more than one value. Only active with plain text, List, and Choices fields.</p>

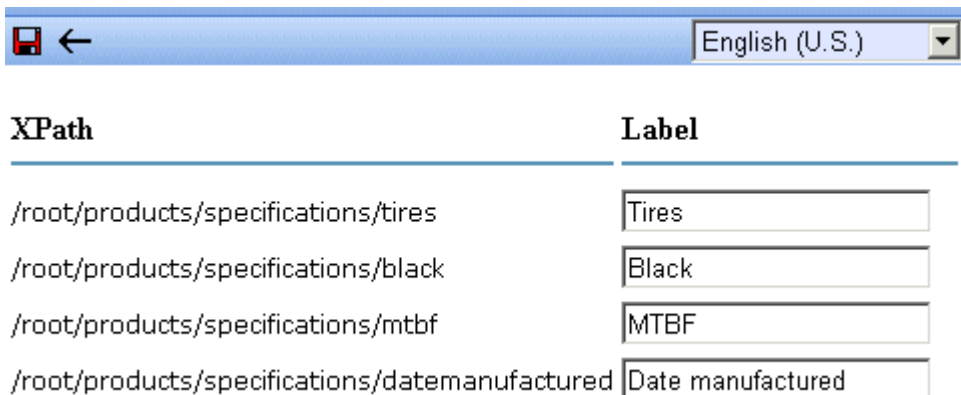
Editing the Search Labels

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


You can create a set of labels for every supported language by using the language dropdown list in the upper right corner of the screen. See Also: "[Working with Multi-Language Content](#)" on page 442

To change the search screen labels, follow these steps.

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



XPath	Label
/root/products/specifications/tires	Tires
/root/products/specifications/black	Black
/root/products/specifications/mtbf	MTBF
/root/products/specifications/datemanufactured	Date manufactured

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

Using the Data Designer

WARNING!

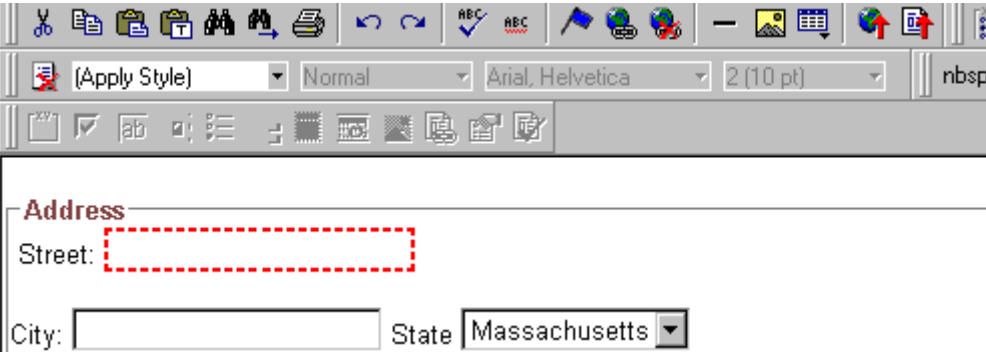
The functionality described in this section is not supported when using an Apple Macintosh for editing content.

eWebEditPro+XML's Data Designer feature lets you design a screen that collects information from users and stores it as XML data. Creating the screen is simple and requires no knowledge of XML.

NOTE

When using the Data Designer feature, the following browsers are supported: Netscape 6.2 or later; Internet Explorer 5.5 or later.

For example, you may create the following screen.



The screenshot shows a web browser window with a form titled "Address". The form has three input fields: "Street:" (a text box with a red dashed border), "City:" (a text box), and "State:" (a dropdown menu with "Massachusetts" selected). The browser's toolbar and address bar are visible at the top.

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

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

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

NOTE

The samples installed with **eWebEditPro+XML** provide a good example of using the Data Designer. To try them out, click the Windows Start button (lower left)

corner of the screen) and follow this path: **Start > Programs > Ektron > eWebEditPro4 > Samples > ASP > Data Design > ASP Data Design Sample.**

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

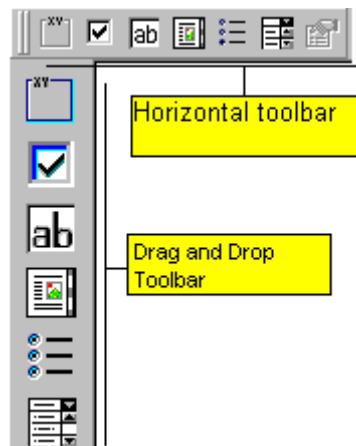
- "Differences in eWebEditPro+XML" on page 229
- "Design Mode vs. Data Entry Mode" on page 230
- "Designing a Screen" on page 231
- "Sample Screen Design" on page 232
- "Inserting a Field Type" on page 241

Differences in eWebEditPro+XML

When you use the Data Designer, **eWebEditPro+XML** changes in the following ways.

NOTE The design toolbar and the design mode and Data Entry mode buttons appear only if your site administrator has defined them in the configuration data.

- two toolbars appear, illustrated below. The toolbar buttons let you design the data entry screen. Each button represents a different kind of field.



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

When using the *drag and drop toolbar*, drag a button to desired screen location.

Note that a context-sensitive menu, available by right clicking the mouse, is also available to perform the commands. You can right click the mouse then select **Insert Field** to display a context-sensitive menu of all commands. To edit the properties of any field already on the screen, select the field, right click the mouse, and select **Field Properties**.

- two buttons appear on the regular (Edit) toolbar: Design mode and Data Entry mode. (For more information, see "[Design Mode vs. Data Entry Mode](#)" on page 230.)



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

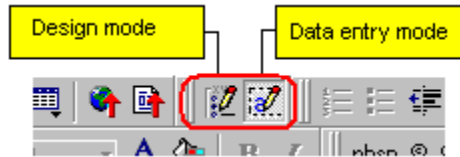
- several regular toolbar buttons are grayed out because they do not work with Data Designer

Design Mode vs. Data Entry Mode

The Data Designer feature supplies two "modes," which make it easier for you to design screens:

- *Data Design mode* - lets you insert and remove fields from the data entry screen
- *Data Entry mode* - simulates the screen's appearance during data entry

Two toolbar buttons let you switch between modes. The buttons are located on the Edit toolbar.



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

Designing a Screen

To design a screen that captures XML data, you

1. Ask your system administrator to enable a version of **eWebEditPro+XML** that includes the Data Designer. (The administrator should refer to the Data Designer chapter of the Developer's Reference Guide.)
2. For each field on the screen, select a field type, and place it on the screen. ["Inserting a Field Type" on page 241](#) explains the kind of field that each button represents.

You can also use **eWebEditPro+XML**'s rich formatting capabilities to design the screen. For example, you can format text, and use tables, images and hyperlinks to guide the user through the data entry process. Below is a sample screen created with the Data Designer.

<p>Basic Information</p> <p>Pictures of Property:</p> <div> </div>			
<p>Description:</p> <p>5th floor unit w/ balcony and one deeded garage space and central air</p>			
MLS#: 31710	#Bedrooms: 2	#Full Baths: 1	
Year Built:	Lot Size (Sq Ft):	Interior Size (Sq Ft): 928	

Sample Screen Design


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

The screenshot shows the Data Designer interface. At the top is a toolbar with various icons for editing and formatting. Below the toolbar is a style sheet selector showing '(Apply Style)', 'Normal', 'Arial, Helvetica', and '2 (10 pt)'. The main area displays a form titled 'Address'. The form contains three input fields: 'Street' (with a red dashed border), 'City' (a text box), and 'State' (a dropdown menu currently set to 'Massachusetts').

NOTE

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

To create such a screen, follow these steps.

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

Group Box

Name: Address

Display name: Address

Use

- ☒ May not be removed
- ☐ May be removed

Allow

- ☒ Only one
- ☐ More than one

Appearance

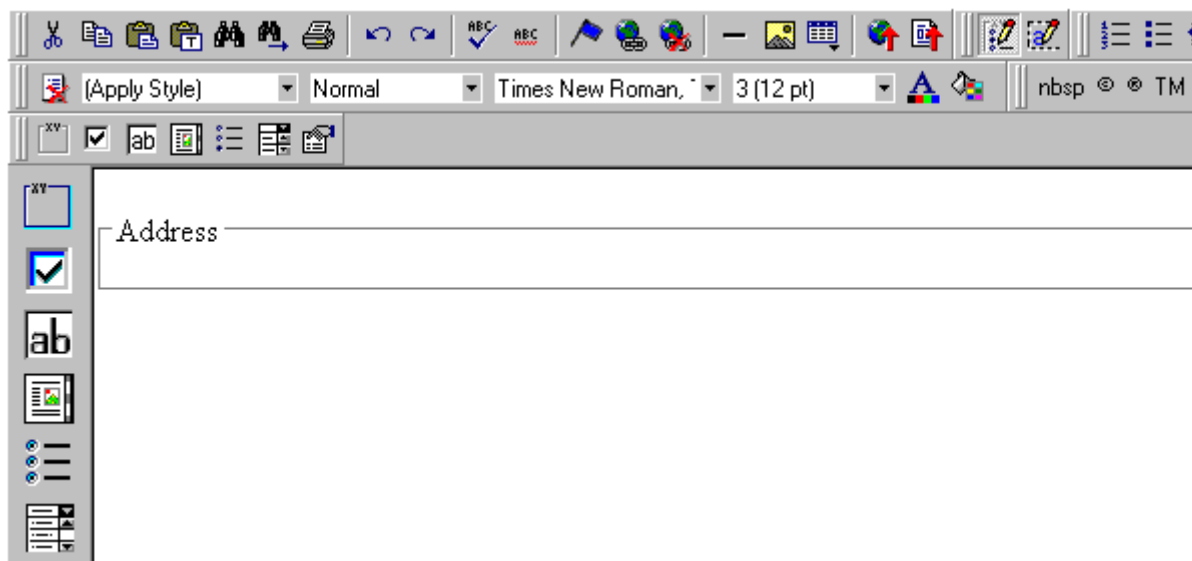
- ☐ No border
- ☒ Show border and caption

Caption: Address

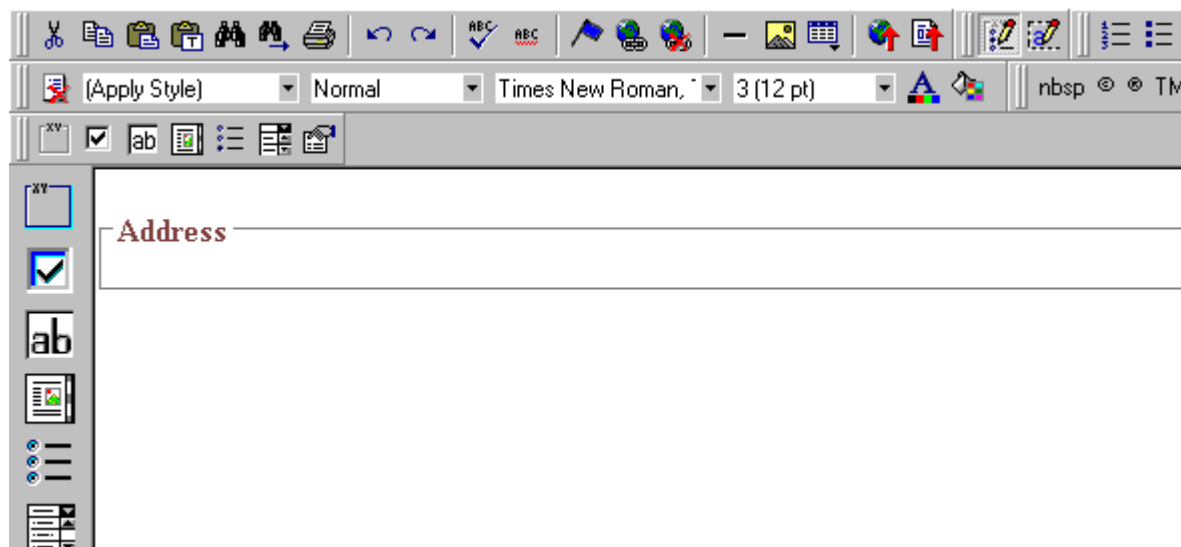
OK Cancel


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

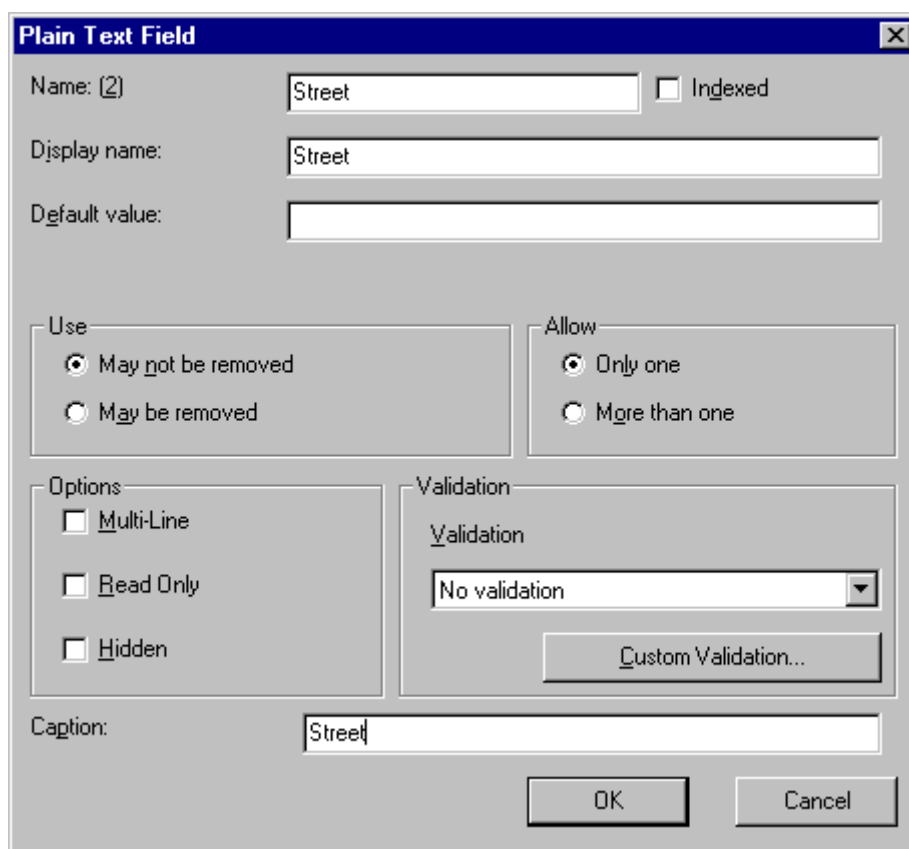
At this point, the screen looks like this.



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



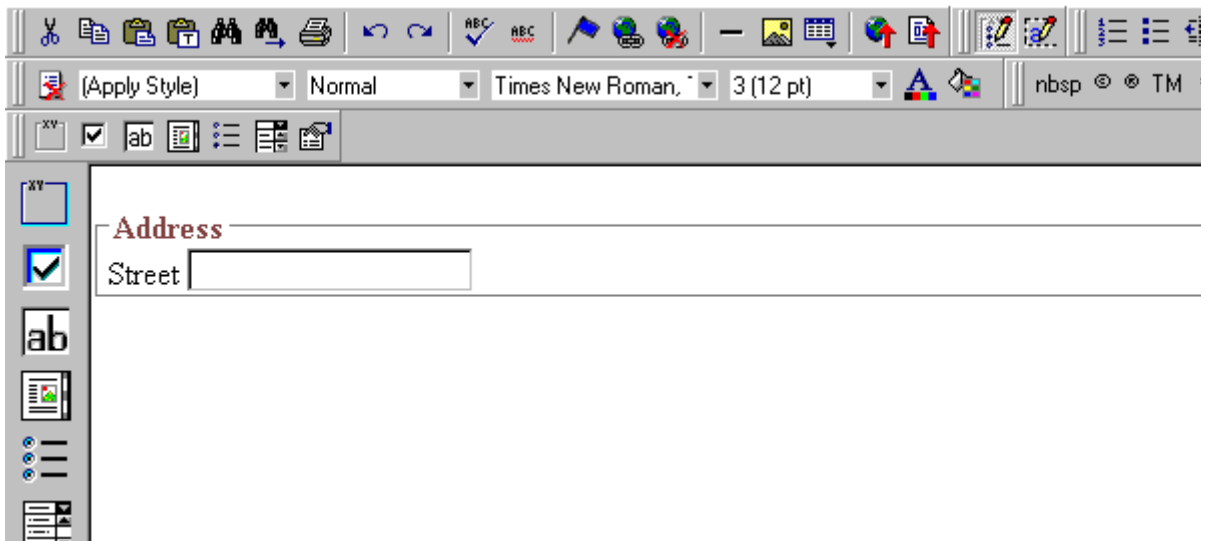
4. The next field, street, should let the user enter text. So, drag the plain text field icon () into the space below **Address**. Then, complete the dialog as shown below.



The image shows a 'Plain Text Field' dialog box with the following fields and options:


- Name:** (2) Street ☐ Indexed
- Display name:** Street
- Default value:**
- Use:**
 - ☒ May not be removed
 - ☐ May be removed
- Allow:**
 - ☒ Only one
 - ☐ More than one
- Options:**
 - ☐ Multi-Line
 - ☐ Read Only
 - ☐ Hidden
- Validation:**
 - Validation: No validation (dropdown menu)
 - Custom Validation... (button)
- Caption:** Street
- Buttons:** OK, Cancel

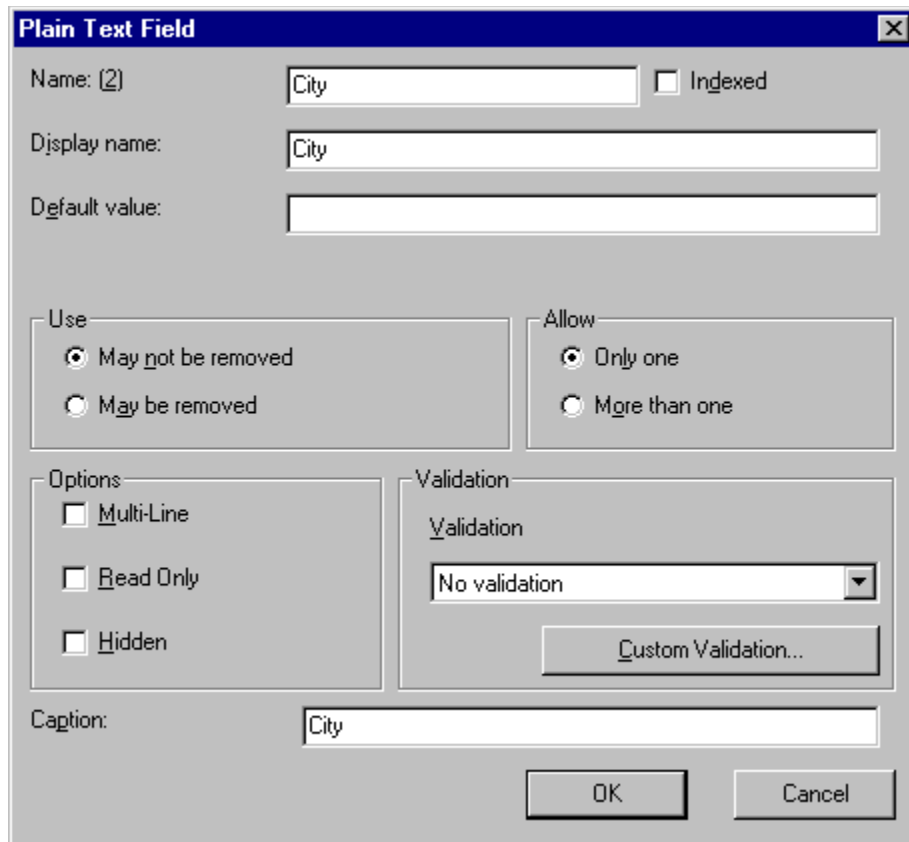
Now, the screen looks like this.



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



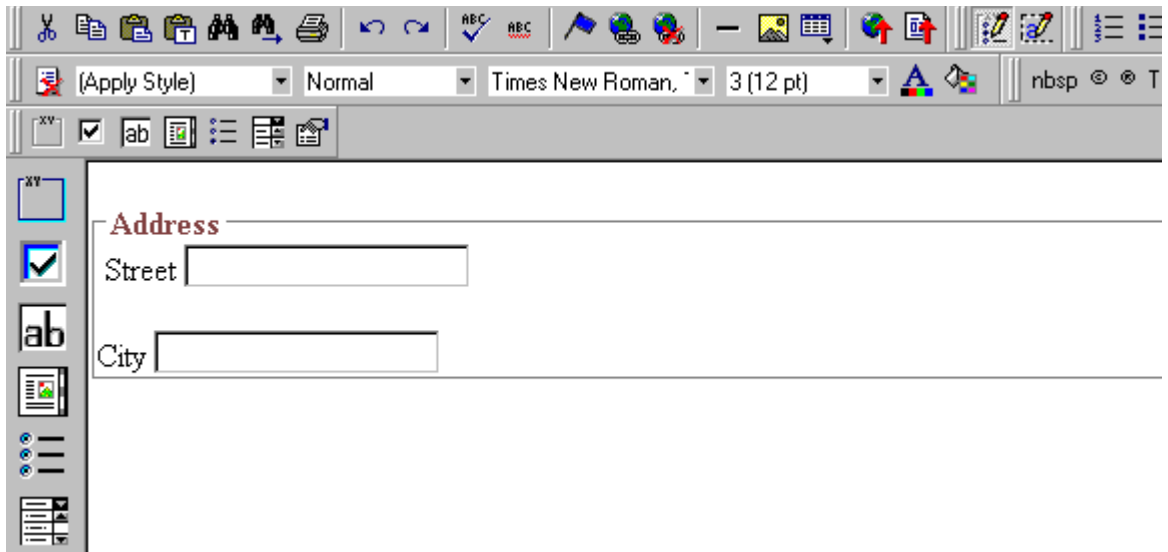
5. The next field, **City**, should also let the user enter text. Assume that you want **City** to appear in the line below **Street**. To make room for **City**, move the cursor to the end of the **Street** field and press <Enter> to create a new line. Next, drag the plain text field icon () into the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




The image shows a 'Plain Text Field' dialog box with the following fields and options:

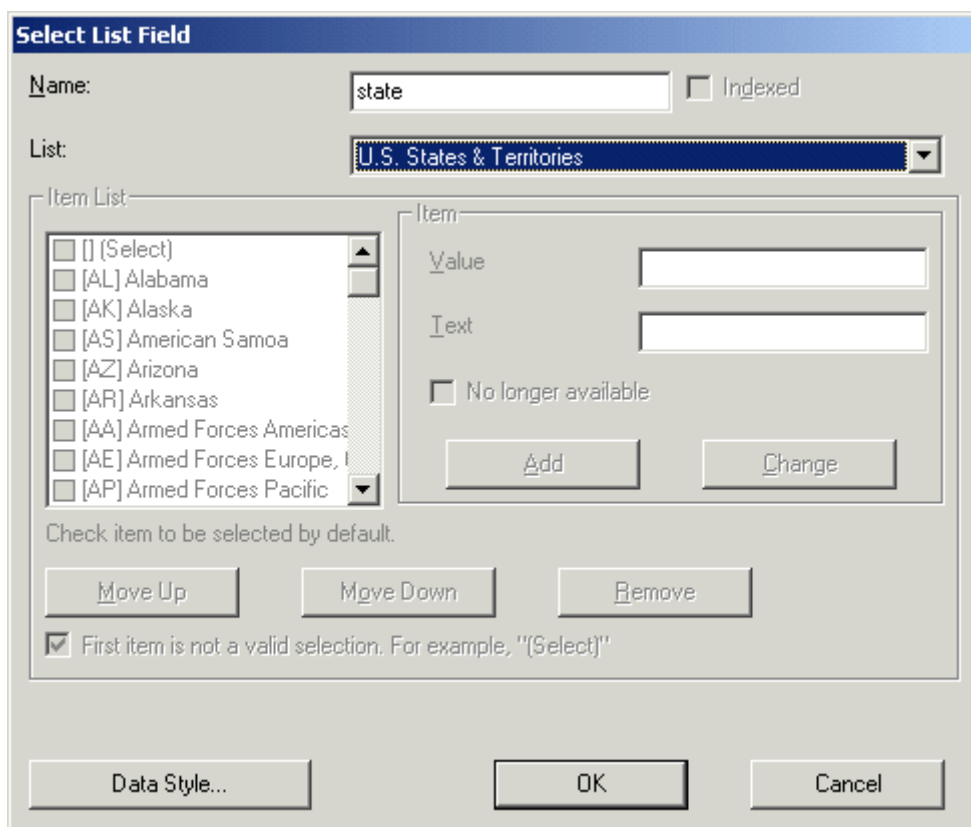
- Name:** [2] City ☐ Indexed
- Display name:** City
- Default value:**
- Use:**
 - ☒ May not be removed
 - ☐ May be removed
- Allow:**
 - ☒ Only one
 - ☐ More than one
- Options:**
 - ☐ Multi-Line
 - ☐ Read Only
 - ☐ Hidden
- Validation:**
 - Validation: No validation (dropdown menu)
 - Custom Validation... (button)
- Caption:** City
- Buttons:** OK, Cancel

Now, the screen looks like this.

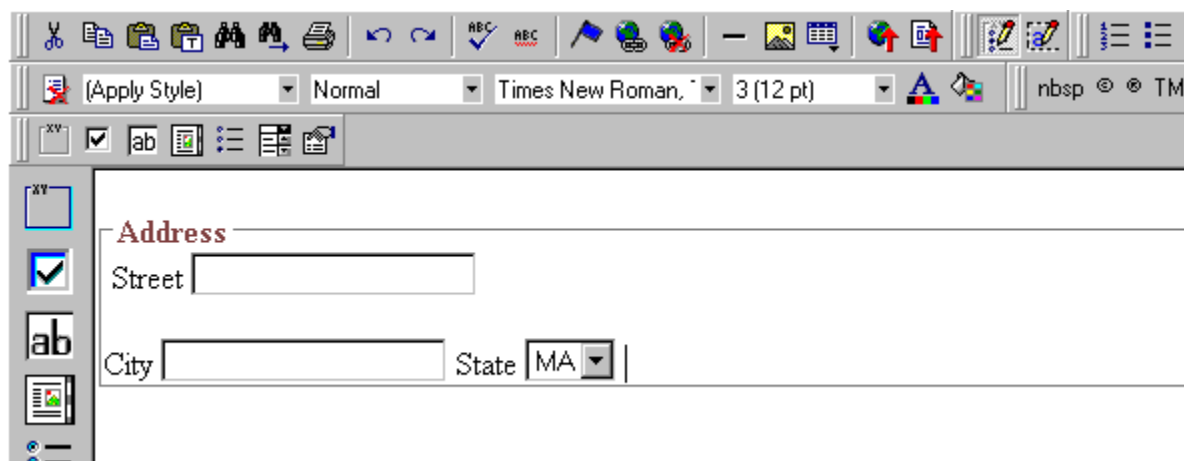


6. The next field, **State**, should let the user choose from several states. Assume that you want the state to appear to the right of **City**. Move the cursor to the end of the **City** field and drag the

Select List Field field icon () into that space. Then, complete the dialog as shown below.












Now, the screen looks like this.







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

Inserting a Field Type

eWebEditPro+XML provides several options that let you insert or edit fields in the editor. Each field type is described below.

Field type	Icon	Description	For more information, see
Group Box		Groups related fields, which can be surrounded by a box and have a caption	"Group Box ()" on page 242
Tabular		Inserts a table into which you can place other types of fields	"Tabular Data ()" on page 246
Checkbox		User's response is either checked or unchecked	"Checkbox ()" on page 254
Plain Text		Free text field; user cannot format text	"Plain Text ()" on page 255
Rich Area		Free text field; user can format text using the editor	"Rich Area ()" on page 260
Choices		Several choices appear on screen. User checks appropriate boxes. All user choices are inserted as values within single XML tag.	"Choices ()" on page 262
List		Same as Choices except options appear in a drop-down box	"Select List ()" on page 265
Calculated		Performs calculations using other fields on the screen	"Calculated Field ()" on page 269
Calendar		Lets user insert a date by clicking a calendar	"Calendar Field ()" on page 279

Field type	Icon	Description	For more information, see
Image Only		Lets user insert an image	"Image Only Field ()" on page 282
File Link		Lets user insert a link to a file, such as a PDF document	"File Link Field ()" on page 285
Field Properties		Lets you change the properties of any field. Select the field then click this button. <u>Note: This option is also available on the right click menu, but not available on the drag and drop toolbar</u>	
Validate		Ensure the screen contains valid XML.	

Group Box ()

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

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

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

or

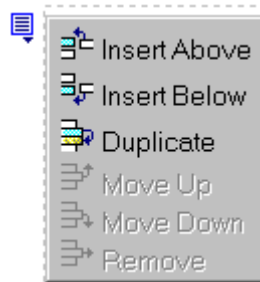
- place the cursor inside the box then select a field type button (if you are using the horizontal toolbar)

Advantages of Grouping Fields

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

For example, if a screen collects several fields of information about each telephone call, the user could simply click the **Insert Below**

button to insert a new group of fields, ready to collect information about the next call.





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

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

Expanded Group Field with glasses icon highlighted



Ektron Book Store:


  Book

Title:

The Confidence Man

Genre: Novel

  Author(s)

 **First Name:** Herman **Last Name:** Melville

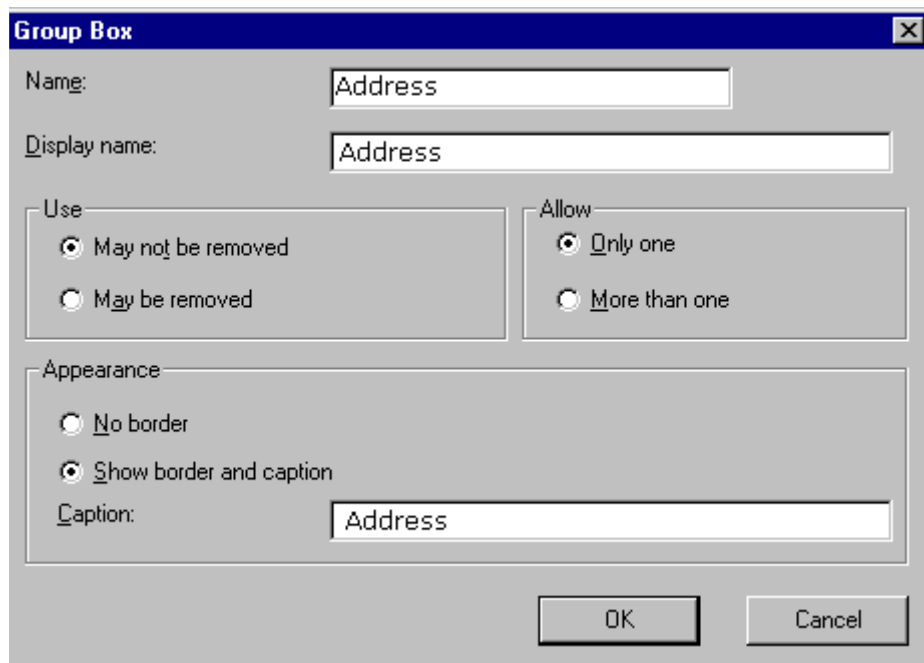
11/25

Collapsed Group Field

Ektron Book Store

Book


Dialog Box



The dialog box is titled "Group Box" and contains the following fields and options:

- Name:** Address
- Display name:** Address
- Use:**
 - ☒ May not be removed
 - ☐ May be removed
- Allow:**
 - ☒ Only one
 - ☐ More than one
- Appearance:**
 - ☐ No border
 - ☒ Show border and caption
- Caption:** Address
- Buttons:** OK, Cancel

Fields on the Group Box Dialog

Field	Description
Name	<p>Enter the name of this field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$\$%^&*()+=<>,:;"'{}[]\`~) into this field.</p> <p>The Name Field's Default Value</p> <p>By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field's default name is Field1, the second field's default name is Field2, etc. You can change the default if you want.</p>
Display Name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 289
Allow	See "The Allow Field" on page 290
Appearance	<p>Click Show border and caption if you want to surround the fields in this group with a box. You can also create a caption to appear in the top line of the box.</p> <p>Click No border if you do not want to surround the fields in this group with a box.</p>
Caption	<p>If desired, enter text to describe this group of fields on the data entry screen. For example</p> <div data-bbox="392 1124 1196 1241">  </div> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p> <hr/> <p>Note: The Caption field only appears on this dialog when you create the Group Box field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.</p> <hr/>

Tabular Data

The Tabular data button inserts a table into which you can place other types of fields. It's similar to a group box.

Tabular data's main advantage over a group box is that it lets you place fields in columns (see below).

Description	In stock?	Qty	Price per unit	Cost
<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/>	<input type="text"/>	NaN

NOTE ["Group Box \(\)" on page 242](#) describes many features that also apply to tabular data. Read that section to gain a full understanding of working with tabular data.

Creating a Table

First you insert the table. Then, you insert an appropriate type of field into each column. As examples, in the table above, the **Description** field type would be plain text, while the **In Stock?** field type would be choices.

When you insert a field into a table, its caption initially appears to the left of the data entry region (see below).

Contact List		
Name:	Phone:	Address:
<input type="text"/>	<input type="text"/>	<input type="text"/>

Ektron recommends moving the caption into the column headers (see below).

Contact List

Name:	Phone:	Address:
<input type="text"/>	<input type="text"/>	<input type="text"/>

Table commands (such as add row and add column) are available by placing the cursor inside a table cell and right clicking the mouse.

IMPORTANT!

Only table cells into which you place a field are available to visitors of your Web page.

Editing Tabular Data

To edit tabular data, hover the cursor carefully over any table border line until you see a four-headed arrow. Then, click the right mouse button and select **Field Properties**.

NOTE

You cannot reduce the number of columns by editing the Tabular Data dialog's **Columns** field. To delete a column, place the cursor in the column and select **Delete Column** from the table commands. The table commands are available in the table drop-down menu, the table toolbar (which is hidden by default), or the right-click context menu.

How Tabular Data Forms XML Structure

Tabular data creates three levels of XML tags:

- inner level: each field in the table
- middle level: each row in the table
- outer level: the entire set of table data

To explain how this works, we'll use the following contact list as an example.

Name	Phone	Email
John Doe	555-1212	john.doe@email.com
Mary Smith	555-8765	msmith@mymail.net

How XML Tags are Assigned to Field Names

When you insert a field into a table, a dialog helps you define the field type. For example, when inserting a plain text field, the Plain Text Field dialog appears. On that dialog, the value of the **Phone** field defines the tags that enclose that field's contents.

To continue our example, every contact is represented in XML as:

```
<Name>John Doe</Name>
<Phone>555-1212</Phone>
<Email>john.doe@email.com</Email>
```

and

```
<Name>Mary Smith</Name>
```

```
<Phone>555-8765</Phone>
<Email>msmith@mymail.net</Email>
```

How XML Tags are Assigned to Table Rows

Each row of the table collects information for one contact. On the Tabular Data Box dialog, the **Row Name** field defines the XML tag that groups information for *each contact*. For example, the **Row Name** field value is **Contact**.

Tabular Data Box

Name: AddressBook

Display name: AddressBook

Use:

- ☒ May not be removed
- ☐ May be removed

Allow:

- ☐ Only one
- ☒ More than one

Rows:

Row Name: Contact

Row Display Name: Contact

```
<Contact>
  <Name>John Doe</Name>
  <Phone>555-1212</Phone>
  <Email>john.doe@email.com</Email>
</Contact>
<Contact>
  <Name>Mary Smith</Name>
  <Phone>555-8765</Phone>
  <Email>msmith@mymail.net</Email>
</Contact>
```

How XML Tags are Assigned to the Entire Table

When you create a table, the name you give it (in the **Name** field of the Tabular Data Box dialog) defines the XML tag that groups *all* contacts on the table. In this example, the name is **AddressBook**.

Tabular Data Box

Name: AddressBook

Display name: AddressBook

Use:

- ☒ May not be removed
- ☐ May be removed

Allow:

- ☐ Only one
- ☒ More than one

Rows:

Row Name: Contact

Row Display Name: Contact

```
<AddressBook>
  <Contact>
    <Name>John Doe</Name>
    <Phone>555-1212</Phone>
    <Email>john.doe@email.com</Email>
  </Contact>
  <Contact>
    <Name>Mary Smith</Name>
    <Phone>555-8765</Phone>
    <Email>msmith@mymail.net</Email>
  </Contact>
</AddressBook>
```

Dialog Box

The screenshot shows a dialog box titled "Tabular Data Box" with a standard Windows XP-style title bar (blue with a close button). The dialog is divided into several sections. The top section contains two text boxes: "Name:" with the value "Field1" and "Display name:" with the value "Field 1". Below these are two groups of radio buttons. The "Use" group has two options: "May not be removed" (selected) and "May be removed". The "Allow" group has two options: "Only one" (selected) and "More than one". Below these is a section titled "Rows" which contains four text boxes: "Row Name:" with "Field2", "Row Display Name:" with "Field 2", "Minimum Number:" with "0", and "Maximum Number:" with an empty box and a checked "Unlimited" checkbox. Below the "Rows" section are two more text boxes: "Columns:" with "2" and "Caption:" with "Fields". At the bottom right are "OK" and "Cancel" buttons.

Tabular Data Box

Name: Field1

Display name: Field 1

Use

- ☒ May not be removed
- ☐ May be removed

Allow

- ☒ Only one
- ☐ More than one

Rows

Row Name: Field2

Row Display Name: Field 2

Minimum Number: 0

Maximum Number: ☐ Unlimited

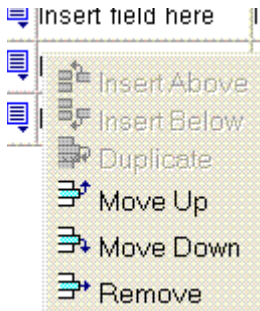
Columns: 2

Caption: Fields

OK Cancel

Fields on the Tabular Data Dialog

Field	Description
Name	<p>Enter the name of this table.</p> <p>See Also: "How Tabular Data Forms XML Structure" on page 247</p> <p>Note that you cannot enter spaces nor most special characters (!@#%&*()+=<>,,:;"'{}[]\`~) into this field.</p> <p>The Name Field's Default Value</p> <p>By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field's default name is Field1, the second field's default name is Field2, etc. You can change the default if you want.</p>
Display name	Enter the text that appears when a user hovers the cursor over the table's column headers.
Use	See "The Use Field" on page 289
Allow	<p>See "The Allow Field" on page 290</p> <hr/> <p>Note: If you check More than one here, you are allowing the user to insert an entirely new table, not an additional table row.</p> <hr/>
Rows	
Row name	<p>Enter the name of the XML tag used to collect data for each entry in the table.</p> <p>See Also: "How Tabular Data Forms XML Structure" on page 247</p>
Row display name	Enter the text that appears when a user hovers the cursor over the table's cells. Use this field to describe the kind of information to be inserted into the table's cells.

Field	Description
Minimum number	<p>If desired, enter the minimum number of rows for this table.</p> <p>If you enter a number and the data entry user tries to save the screen without inserting at least the minimum number of rows, he is informed that Element content is incomplete according to the DTD/Schema.</p> <p>By default, the user is allowed to cancel or save the screen anyway. However, the system administrator determines whether or not a user can save an invalid document.</p>
Maximum number	<p>If desired, enter the maximum number of rows for this table. If you don't want to assign a maximum number, check the Unlimited check box.</p> <p>Result of Assigning a Maximum</p> <p>When this table appears on a data entry screen, and a user adds the maximum number of rows, the Insert Above and Insert Below options are grayed out on the menu (see example below).</p> 
Columns	<p>Enter the number of columns to appear in the table.</p> <p>See Also: "Editing Tabular Data" on page 247</p>
Caption	<p>If desired, enter text to describe this table on the data entry screen. The caption appears centered above the table.</p> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify the caption's size, font, color, and other attributes.</p>

Checkbox (☑)

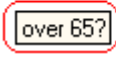
A Checkbox field is only one character wide and accepts one of two possible values: checked or unchecked. For example

☐ Check if you are over 65

Dialog Box

Fields on the Checkbox Dialog

Field	Description
Name	<p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,:;'"{}[]'~) into this field.</p> <p>See Also: "The Name Field's Default Value" on page 245</p>

Field	Description
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The Indexed field may not appear, depending on how your administrator set up your system.</p>
Display name	<p>Enter text that appears when a user hovers the cursor over this field (circled in red below).</p> <p><input type="checkbox"/> Check if you are over 65</p> 
Default value	<p>If you want this field to be checked when the screen first appears, click True.</p> <p>Otherwise, click False.</p>
Caption	<p>Enter text to guide the user's response to this field. To continue the above example, the caption would be Check if you are over 65.</p> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p> <hr/> <p><u>Note: The Caption field only appears on this dialog when you create the Check Box field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.</u></p>

Plain Text (ab)

Use a plain text field when you want the user to enter an unformatted, free text response.

NOTE If a plain text field tries to perform a numerical calculation with a value that is blank or contains letters, NaN appears in the field. (NaN stands for "not a number.") If a plain text field tries to divide by zero, Infinity appears.

Plain Text Field vs. Rich Area Field

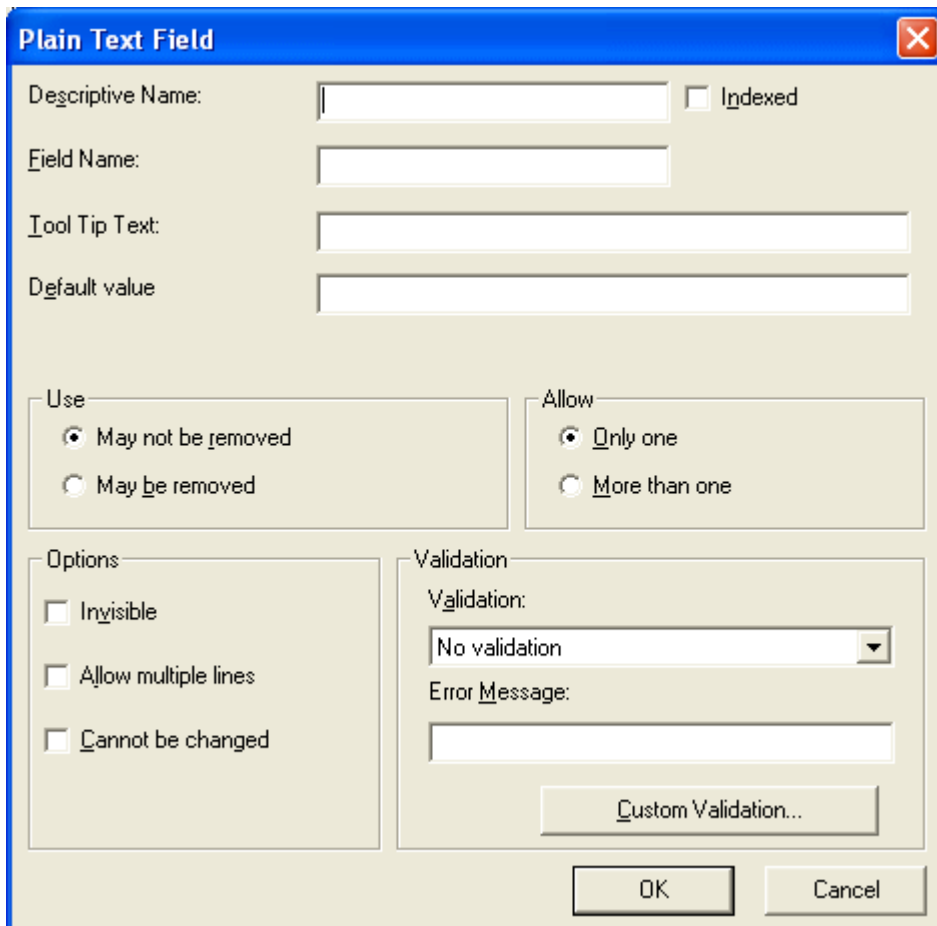
The following capabilities are available with a plain text field but not a rich area field.

- You can adjust the field's width by dragging it. See ["Resizing a Plain Text Field" on page 260](#).
- The text can be read-only or hidden

The following capability is available with a rich area field but not a plain text field.

- In Data Entry mode, the user can change the text's format, size, style, etc. along with adding hyperlinks, using **eWebEditPro+XML**'s formatting capabilities.
- You can enter custom tags.

Dialog Box



The **Plain Text Field** dialog box is used to configure a text field. It contains the following sections:

- Descriptive Name:** A text input field with an ☐ **Indexed** checkbox to its right.
- Field Name:** A text input field.
- Tool Tip Text:** A text input field.
- Default value:** A text input field.
- Use:** Two radio buttons: ☒ **May not be removed** and ☐ **May be removed**.
- Allow:** Two radio buttons: ☒ **Only one** and ☐ **More than one**.
- Options:** Three checkboxes: ☐ **Invisible**, ☐ **Allow multiple lines**, and ☐ **Cannot be changed**.
- Validation:** A **Validation:** dropdown menu (currently showing "No validation"), an **Error Message:** text input field, and a **Custom Validation...** button.

At the bottom right are **OK** and **Cancel** buttons.

Fields on the Plain Text Dialog

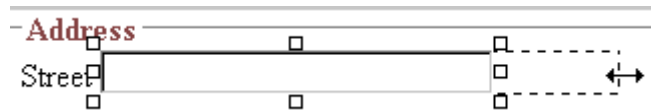
Field	Description
Descriptive Name	<p>Enter the name of this field. The descriptive name is used internally to identify this field. Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,.:;'"{}[]\`~) into this field.</p> <p>See Also: "The Name Field's Default Value" on page 245</p>
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The Indexed field may not appear, depending on how your administrator set up your system.</p>
Field name	Enter the field's id attributes used in the xml. It must be unique within the xml document.
Tool Tip Text	Enter the text that appears when a user hovers the cursor over this field.
Default Value	<p>If you want to set a default value for this field, enter that value here. The default value appears in Data Entry mode, where the user can accept, change, or delete it.</p> <p>For example, if this field collects a city, and most users enter New York, enter New York as the value.</p>
Use	See "The Use Field" on page 289
Allow	See "The Allow Field" on page 290
Options	<p>Invisible - Check here to make this field hidden in Data Entry mode. This option lets you store unseen information in each XML document. An example might be putting a version number for the data design so that XML documents can be upgraded to newer versions using an XSL transform.</p> <p>Allow multiple lines - Check here to let this text box expand to accommodate the user's input. If you do not check this box, a single line input box appears on the data entry screen to accept user input.</p> <hr/> <p>A field can be either invisible or cannot be changed -- it cannot be both.</p> <hr/> <p>Cannot be changed - Check here to make this field read-only. That is, the user cannot insert data into it in Data Entry mode.</p> <p>You might use this option to provide user instructions for completing the screen.</p>

Field	Description
Validation	<p>Select the kind of validation to apply to this field. Your choices are:</p> <ul style="list-style-type: none"> • No validation - the user's response is not checked • Cannot be blank - the user must enter a response • Non-negative whole number or blank - the user must enter a positive whole number or no response • Non-negative whole number (required) - the user must enter a positive whole number • Decimal number or blank - must be a decimal number (for example, 12.345 or 12) or blank. A leading minus sign "-" is allowed. The decimal point must be a period (.), even in locales that normally use a comma (,). <hr/> <p>Decimal numbers include whole numbers because the decimal point is implied. That is, 12 is 12.0000.</p> <hr/> <ul style="list-style-type: none"> • Decimal number required - must be a decimal number (it cannot be blank) of none, one, or two decimal places. A leading minus sign "-" is allowed. The decimal point must be period (.), even in locales that normally use a comma (,). • Percent: (0-100) required - the user must enter a whole number from 0 to 100 • Zip code (US only) - the user's response must consist of 5 (<i>nnnnn</i>) or 9 digits separated by a dash after the fifth (<i>nnnnn-nnnn</i>) • Social Security number (US only) - the user's response must consist of nine digits in this pattern: <i>nnn-nn-nnnn</i> • Custom - You can create custom validation. <p>For more information, see "Custom Validation" on page 293.</p> <p>If you assign to this field any value other than No validation, the field is initially surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criterion, the field remains surrounded by red dashes. The system administrator determines whether or not the user can save an invalid document.</p>
Data Style	<p>See "The Data Style Field" on page 291</p> <hr/> <p>Note: The Data Styles button only appears if the Remove Styles field on the Application Setup screen is unchecked. If the Remove Styles field is checked, styles are removed when the content is saved.</p> <hr/>

Resizing a Plain Text Field

If you insert a plain text field and its width is too small or too large, you can easily resize it. To do so, follow these steps.

1. Place the cursor over the field and click. The cursor changes to a four-headed arrow, and small boxes surround the field.
2. Move the cursor to the far right of the field. (See illustration below). The cursor turns into a two-headed arrow.



3. Drag the arrow to adjust the field width as desired.

Rich Area

Use a rich area field to let a user enter a free text response that can be formatted using the editor buttons.

See Also: ["Plain Text Field vs. Rich Area Field" on page 256](#)

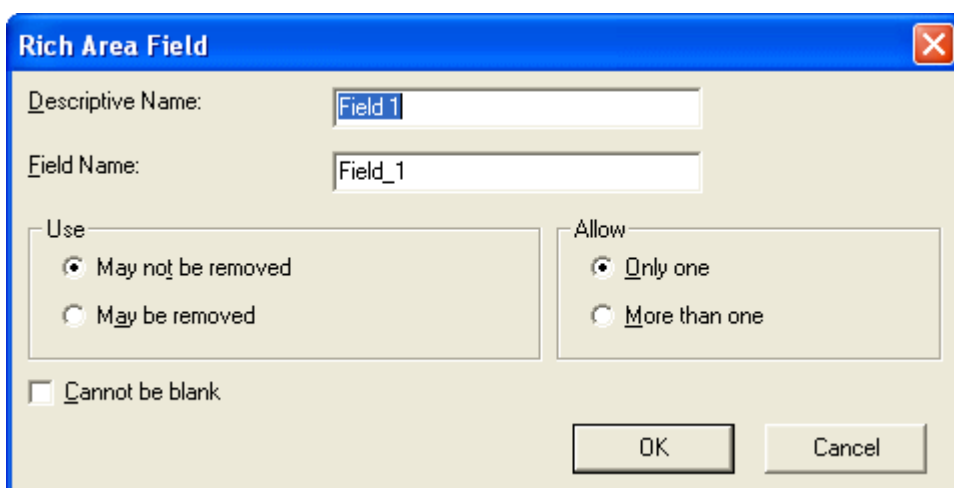
TIP! Unlike many other fields, the Rich Area dialog box does not prompt for a field caption. You can still enter text describing the field on the editor screen before or after you insert a Rich Area field.

Adjusting the Width of a Rich Area Field

Note that, unlike a plain text field, the width of a rich area field cannot be adjusted. It occupies the entire screen width. If a user enters more text than fits on one line, the rich area field automatically adds more lines. To limit the width of a rich area field, place it in a table cell. In this case, the field is as wide as the cell.

If you want to insert default text into a rich area field, insert it after you place the field in the editor.

Dialog Box



The image shows a dialog box titled "Rich Area Field". It contains two text input fields: "Descriptive Name:" with the value "Field 1" and "Field Name:" with the value "Field_1". Below these are two groups of radio buttons. The "Use" group has two options: "May not be removed" (selected) and "May be removed". The "Allow" group has two options: "Only one" (selected) and "More than one". At the bottom left is a checkbox labeled "Cannot be blank" which is currently unchecked. At the bottom right are "OK" and "Cancel" buttons.

Fields on the Rich Area Dialog

Field	Description
Descriptive Name	Enter the name of the field. The descriptive name is used internally to identify this field. Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>.,:;'"{}[]\`~) into this field. See Also: "The Name Field's Default Value" on page 245
Indexed	Ektron CMS400.NET does not let you index a rich area field. Ignore this checkbox.
Field name	Enter the field's id attributes used in the xml. It must be unique within the xml document.
Use	See "The Use Field" on page 289
Allow	See "The Allow Field" on page 290
Cannot be blank	If you want to require the user completing this field to enter a response, click inside this check box.

Choices (☒)

Use the Choices field when you want to give the data entry user several choices. For example, you could create a Choices field named **Interests** that lists these options.

- music
- art
- sports

The data entry user could check the first two and leave the third blank.

Choices Field vs. Select List Field

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

- You can limit the user's choice to one item or many.
- All items appear on the screen, arranged horizontally or vertically

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

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



Dialog Box

Choices Field

Name: ☐ Indexed

Display name:

Allow selection:

- ☒ Only one
- ☐ More than one
- ☐ A selection is required

Appearance:

- ☒ Vertical List
- ☐ Horizontal List

Item List

Item

Value:

Caption:

☐ No longer available

Add Change

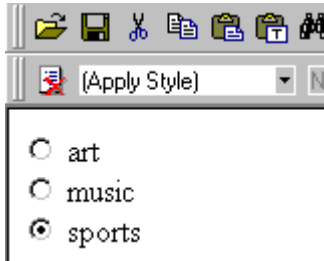
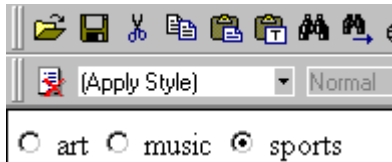
Check item to be selected by default.

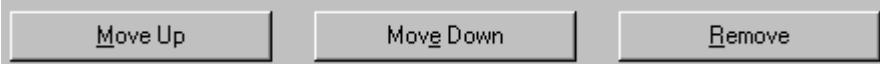
Move Up Move Down Remove

Data Style... OK Cancel

Fields on the Choices Dialog

Field	Description
Name	<p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#%\$%^&*()+=<>,:;"'{}[]\`~) into this field.</p> <p>See Also: "The Name Field's Default Value" on page 245</p>

Field	Description
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The Indexed field may or may not appear, depending on how your administrator set up your system.</p>
Display name	Enter the text that appears when a user hovers the cursor over this choice list.
Allow selection	<p>Click More than one to allow the data entry user to select more than one item on the data entry screen. Otherwise, click Only one.</p> <p>For example, if you click More than one, and the choices are: music, art, sports, the user could select all three choices.</p> <p>If you click Only one, the user could only select one choice.</p> <p>A selection is required - Check this box if the user must select at least one item in the list.</p>
Appearance	<p>Click Vertical List to arrange the choices vertically.</p>  <p>Click Horizontal List to arrange the choices horizontally.</p> 

Field	Description
Item List	<p>This section of the screen displays the items that you enter in the Value and Text fields.</p> <p>Buttons near the bottom of the screen let you remove items from this list as well as rearrange them.</p> <div style="border: 1px solid gray; padding: 5px; text-align: center;">  </div> <p>Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox. Note that if Only One is selected under Allow selection (above), only one item can be selected.</p>
Value	<p>Enter the value that is collected when the data entry user selects this item.</p> <p>For example, if Interests appears in the Name field, and you want <i>music</i> to be collected when the data entry user selects this item and saves the page, enter music here.</p>
Caption	<p>Enter text to describe this item on the data entry screen.</p> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p>
No longer available	<p>Use this field to indicate that an item can no longer be selected by a user in data entry mode. For example, you have a list of team members. If one member leaves, check No longer available rather than removing the item.</p> <p>If checked, the only appears in data entry mode <i>if</i> a document already contained the item's when the check is applied.</p> <p>This field lets you render a value obsolete without invalidating an existing XML document.</p> <p>Exception! -- If multiple selections are allowed in a Choices Field and the item is selected in design mode, it appears in data entry mode but is disabled (grayed-out). This lets you force an item's value into the XML document.</p>
Data Style	<p>See "The Data Style Field" on page 291</p> <hr/> <p>Note: The Data Styles button only appears if the Remove Styles field on the Application Setup screen is unchecked. If the Remove Styles field is checked, styles are removed when the content is saved.</p> <hr/>

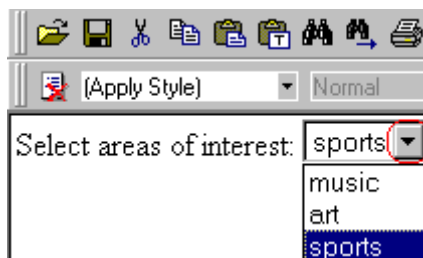
Select List

A Select List field is similar to a Choices field. The biggest difference is that the responses appear in a drop-down box instead

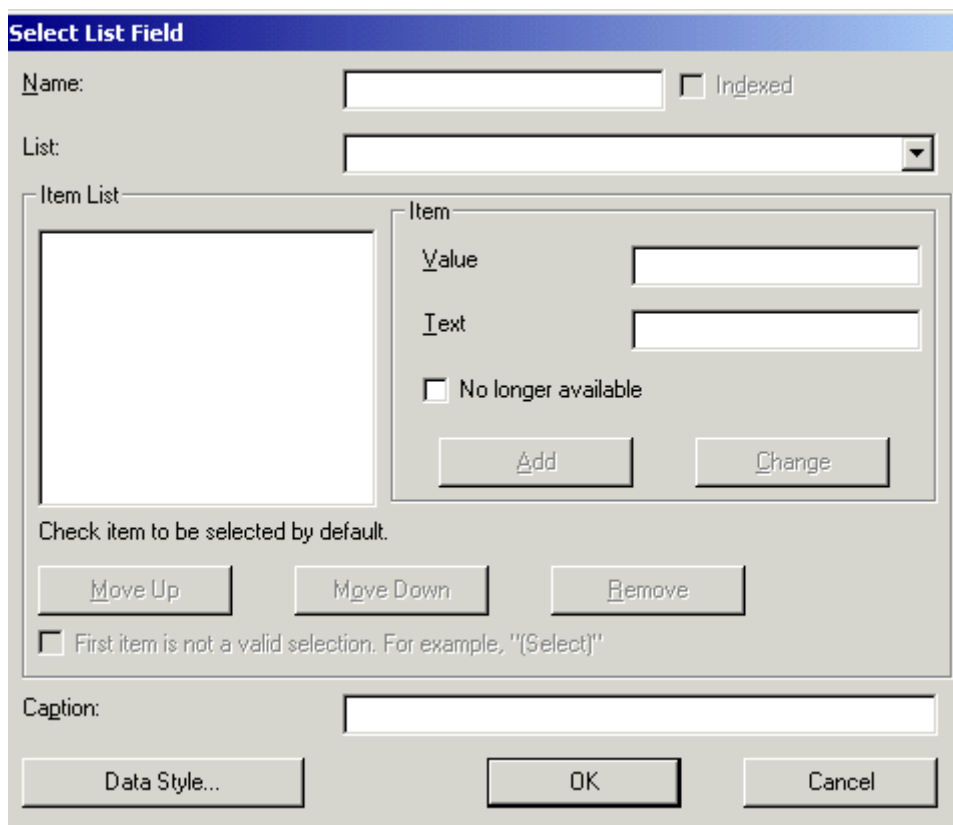
of appearing separately. To see the choices, click the down arrow on the right side of the box (circled below).

See Also: ["Choices Field vs. Select List Field" on page 262](#)

For example:



Dialog Box



Fields on the Select List Field Dialog

Field	Description
Name	<p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,:;"'{}[]\`~) into this field.</p> <p>The Name Field's Default Value</p> <p>By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field's default name is Field1, the second field's default name is Field2, etc. You can change the default if you want.</p>
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The Indexed field may not appear, depending on how your administrator has set up your system.</p>
List	<p>Click the drop-down arrow to see several pre-defined lists. If you choose one, its values appear in the Item List field.</p>
Item List	<p>This section of the screen displays the items that you enter in the Value and Text fields.</p> <p>Buttons let you remove items from this list as well as rearrange them.</p> <p>Place a check in the box of any item to be checked by default on the data entry screen. If you do, the user can accept the default or uncheck the item by clicking in the checkbox.</p>
Value	<p>Enter the value that is collected when the data entry user selects this item.</p> <p>For example, if Interests appears in the Name field, and you want <code>music</code> to be collected when the data entry user selects this item and saves the page, enter music here.</p>
Text	<p>Enter text to describe this item on the data entry screen.</p> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p>

Field	Description
No longer available	<p>Use this field to indicate that an item can no longer be selected by a user in data entry mode. For example, you have a list of team members. If one member leaves, check No longer available rather than removing the item.</p> <p>If checked, the only appears in data entry mode <i>if</i> a document already contained the item's when the check is applied.</p> <p>This field lets you render a value obsolete without invalidating an existing XML document.</p> <p>Exception! -- If multiple selections are allowed in a Choices Field and the item is selected in design mode, it appears in data entry mode but is disabled (grayed-out). This lets you force an item's value into the XML document.</p>
First item is not a valid selection. For example, "(Select)"	<p>Check here if the first item on the list is not a valid value but instead text that prompts the user to respond to the field. An example of such text for a list of states would be Select a state.</p> <p>If you check this box and the user selects the first value on the list (most likely by default), an error message appears when he tries to save the screen.</p>
Caption	<p>Enter text to guide the user's selection. For example, if the user needs to select an area of interest, the caption could be Choose your interests.</p> <hr/> <p><u>Note: The Caption field only appears on this dialog when you create the Select List field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.</u></p>
Data Style	<p>See "The Data Style Field" on page 291</p> <hr/> <p><u>Note: The Data Styles button only appears if the Remove Styles field on the Application Setup screen is unchecked. If the Remove Styles field is checked, styles are removed when the content is saved.</u></p>

Calculated Field ()

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

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

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

IMPORTANT!

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

Dialog Box

Calculated Field

Name: ☐ Indexed

Display name:

Calculation

Formula:

Select Field...

Examples

Validation

Validation:

Custom Validation...

Caption:

OK Cancel

Fields on the Calculated Field Dialog

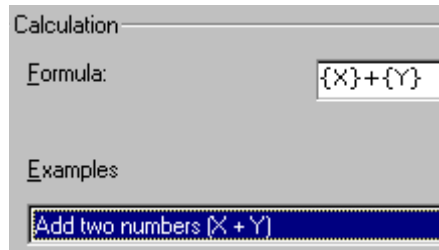
Field	Description
Name	<p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,:;"'{}[]\`~) into this field.</p> <p>The Name Field's Default Value</p> <p>By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field's default name is Field1, the second field's default name is Field2, etc. You can change the default if you want.</p>

Field	Description
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The Indexed field may or may not appear, depending on how your administrator has set up your system.</p>
Display name	Enter the text that appears when a user hovers the cursor over this field.
Calculation	Use this area of the screen to define the calculation that this field will perform.
Formula	Enter the calculation that this field will perform. See <i>Also: "Using the Formula Field" on page 272</i>
Select Field	Click this button to select a field to reference in the calculation. For more information, see <i>"Using the Formula Field" on page 272</i> .
Examples	<p>Click the down arrow to the right of this field to see examples of calculations you can perform. When you select an example, it is copied into the Formula field.</p> <hr/> <p>Your system administrator can customize the examples. Instructions are provided in "The <cmdddsgcalc> Command" in the Data Designer chapter of the Developer Reference Guide.</p> <hr/> <p><i>See Also: "Explanation of Examples" on page 275</i></p>

Field	Description
Validation	<p>Select the kind of validation to apply to this field. Your choices are:</p> <ul style="list-style-type: none"> • No validation - the user's response is not checked • Non-negative number (required) - the result of the calculation must be a positive number • Custom - You can create custom validation. For more information, see "Custom Validation" on page 293. <p>If you assign to this field any value other than No validation, the field is surrounded by red dashes in Data Entry mode. If the user's response does not meet the validation criteria, the field remains surrounded by red dashes. Your system administrator determines if a user can save a screen with invalid data.</p>
Caption	<p>Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p> <hr/> <p>Note: The Caption field only appears on this dialog when you create the Calculated field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.</p> <hr/>
Data Style	<p>See "The Data Style Field" on page 291</p> <hr/> <p>Note: The Data Styles button only appears if the Remove Styles field on the Application Setup screen is unchecked. If the Remove Styles field is checked, styles are removed when the content is saved.</p> <hr/>

Using the Formula Field

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



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

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

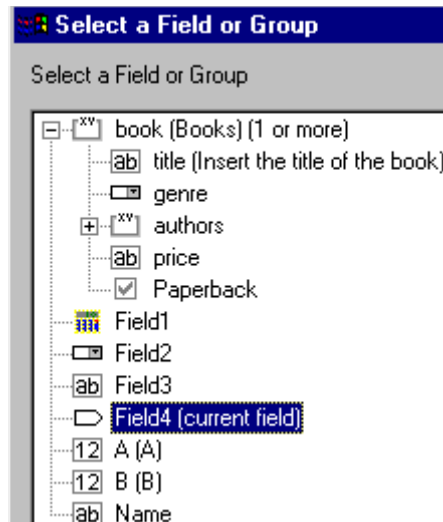
If a calculated field tries to divide by zero, `Infinity` appears.

WARNING!

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

To do this, follow these steps.

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



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

WARNING!

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

4. Continue replacing all variables in the formula.

Notes

- If an XML document contains several occurrences of a field that is referenced in a formula, the value is derived as follows:
 - When using the XPath functions `sum()` and `count()`, all values with the field name are considered. For example, a document includes three books whose prices are \$10, \$20 and \$30. In this case, `sum`'s value is \$60.
 - When using all other functions, the first value is used. For example, a document includes three books whose prices are \$10, \$20 and \$30. If a calculation formula refers to `<price>`, its value is \$10.
- You can replace a variable with a number instead of a field. For example, replace `{X} * {Y}` with `../price * 1.15`.
- The expression can be complex, such as `(round(Field1 * 0.80) + (1 div Field2)) - 2`.

- You can use a string expression that creates a text message. For example, to calculate a full name from its parts: `concat(title, ' ', givenname, ' ', familyname)`, which could produce “Dr. Jonathan Smythe”.

Referencing Other Calculated Fields

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

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

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

Explanation of Examples

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

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

Example Field Text	Example Field Formula	Description
Divide two numbers	<code>format-number({X} div {Y} , '0.###')</code>	Divide the value in the first field (X) by the value in the second field (Y).
Format as a percentage	<code>format-number({X} div {Y} , '#0%')</code>	Determine what percentage one number (X) is of another (Y). For example, if {X}=10 and {Y}=100, the result of the calculation is 10%.
Absolute value of a number	<code>{X} * (number({X} > 0)*2-1)</code>	The number regardless of the sign (negative or positive).
Minimum of two numbers	<code>{X} * number({X} <= {Y}) + {Y} * number({X} > {Y})</code>	The smaller of two field values.
Maximum of two numbers	<code>{X} * number({X} > {Y}) + {Y} * number({X} <= {Y})</code>	The larger of two field values.
Zero if subtraction is negative	<code>((X) - {Y}) * number(({X} - {Y}) > 0)</code>	Subtract one number (Y) from another (X). If the difference is less than zero, insert zero.
Multiply by another number if checkbox is checked	<code>{X} * ({Y} * number({Z} = 'true') + number({Z} != 'true'))</code>	X is a numeric field. Y is another numeric field to multiply by X if a checkbox is checked. Z is the checkbox. For example, {X}=2 and {Y}=3 <ul style="list-style-type: none"> if the checkbox is checked, the result is 2 * 3, which is 6 If the checkbox is not checked, the result is 2
Round a decimal number	<code>round({X})</code>	Rounds the number to the nearest integer. For example, <code>round(3.14)</code> . The result is 3.
Round up a decimal number	<code>ceiling({X})</code>	Returns the smallest integer that is greater than the number. For example, <code>ceiling(3.14)</code> . The result is 4. For negative numbers: <code>ceiling(-3.14) = -3</code>

Example Field Text	Example Field Formula	Description
Round down a decimal number	<code>floor({X})</code>	Returns the largest integer that is not greater than the number argument. . For example, <code>floor(3.14)</code> . The result is 3. For negative numbers: <code>floor(-3.14) = -4</code>
Format decimal number 0.00	<code>format-number({X} , '0.00')</code>	Rounds a value either up or down to the hundredth place. As examples, 100 becomes 100.00, and 3.14159265 becomes 3.14.
Total numeric values from multiple fields	<code>sum({X}[text()] {Y}[text()] {Z}[text()])</code>	Add the values in all referenced fields. Only elements that contain a value are summed. Empty elements are excluded.
Total a list of numeric values	<code>sum({X}[text()])</code>	Total all values in a single repeating field. Here's an example. Plain Text Field properties Name: Miles Allow: more than one Validation: non-negative whole number XML Data <pre> <root> <Miles>89</Miles> <Miles>12</Miles> <Miles>23</Miles> <Miles>19</Miles> </root> </pre> <code>sum(Miles)</code> equals <code>89+12+23+19=143</code> Only elements that contain a value are summed. Empty elements are excluded.

Example Field Text	Example Field Formula	Description
Average a list of numeric values	<code>format-number(sum({X}[text()]) div count({X}),'0.###')</code>	<p>Calculate the average of all values in a single repeating field.</p> <p>To continue the example from the Total a list of numeric values field (above):</p> <p>Plain Text Field properties</p> <p>Name: Miles</p> <p>Allow: more than one</p> <p>Validation: non-negative whole number</p> <p>XML Data</p> <pre><root> <Miles>89</Miles> <Miles>12</Miles> <Miles>23</Miles> <Miles>19</Miles> </root></pre> <p>Average=89+12+23+19=143 divided by the number of values (4)= 35.75</p> <p>Only elements that contain a value are summed. Empty elements are excluded.</p>
Count the number of values in a list	<code>count({X})</code>	<p>Calculate the number of values in a single repeating field.</p> <p>To continue the example from the Total a list of numeric values field (above):</p> <p>Plain Text Field properties</p> <p>Name: Miles</p> <p>Allow: more than one</p> <p>Validation: non-negative whole number</p> <p>XML Data</p> <pre><root> <Miles>89</Miles> <Miles>12</Miles> <Miles>23</Miles> <Miles>19</Miles> </root></pre> <p>Count = 4</p>

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

Calendar Field

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



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

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

Moving a Calendar Field

Unlike other Data Designer fields, you cannot drag and drop a calendar field between table cells. Instead, you must select the field, cut it, then move the cursor to the new cell and paste it.

Dialog Box

Calendar Field

Name: Field1 ☐ Indexed

Display name: Field 1

Default value:

Use

- ☒ May not be removed
- ☐ May be removed

Allow

- ☒ Only one
- ☐ More than one

Validation

Validation: No validation

Caption: Date:

Data Style... OK Cancel

Fields on the Calendar Field Dialog

Field	Description
Name	<p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,:;"'{}[]\`~) into this field.</p> <p>The Name Field's Default Value</p> <p>By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field's default name is Field1, the second field's default name is Field2, etc. You can change the default if you want.</p>
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The Indexed field may or may not appear, depending on how your administrator has set up your system.</p>
Display name	Enter the text that appears when a user hovers the cursor over this field.
Default value	<p>If you want this screen to have a default date when the user first sees it, click the calendar icon to the right and select a date. The user can change the date in Data Entry mode.</p> <hr/> <p>Note: If you enter a default date, you cannot later remove it. You can change it. If necessary, you can delete the field and enter a new one.</p> <hr/>
Use	See "The Use Field" on page 289
Allow	See "The Allow Field" on page 290

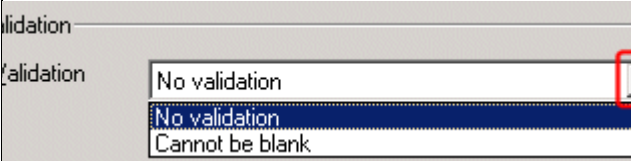

Field	Description
Validation	<p>If you want to require the user using the calendar to enter a response, click the down arrow to the right of this response field and select Cannot be blank.</p> 
Caption	<p>Enter text to describe this item on the data entry screen. After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p> <hr/> <p><u>Note: The Caption field only appears on this dialog when you create the Calendar field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.</u></p>
Data Style	<p>See "The Data Style Field" on page 291</p> <hr/> <p><u>Note: The Data Styles button only appears if the Remove Styles field on the Application Setup screen is unchecked. If the Remove Styles field is checked, styles are removed when the content is saved.</u></p>

Image Only Field ()

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

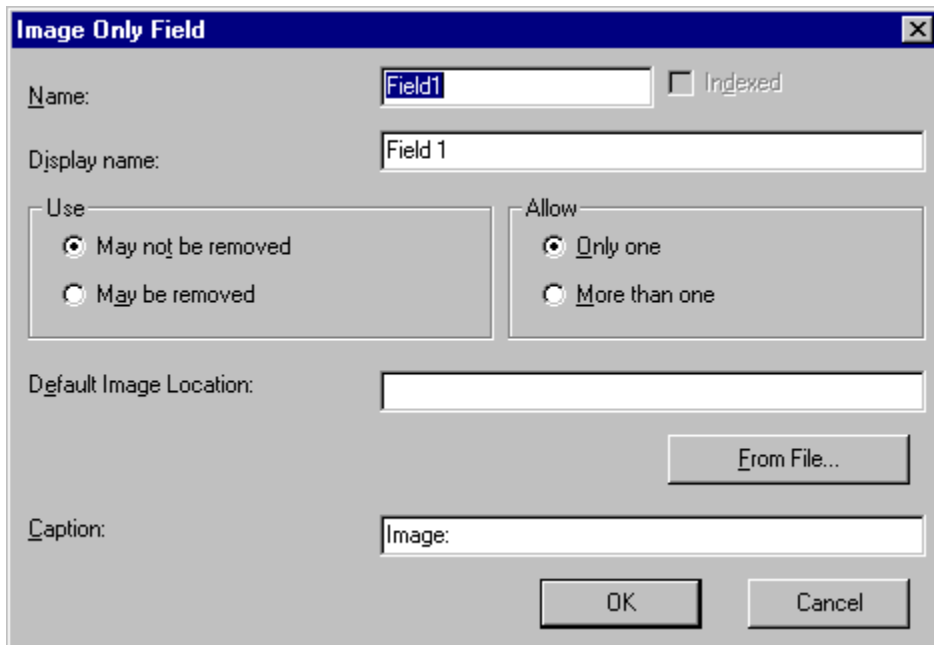
To let the user insert any file, such as a Microsoft Word document, use a File Link field. See [Also: "File Link Field \(\)" on page 285](#)

Using an Image Only Field in Data Entry Mode

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

NOTE

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

Dialog Box


The dialog box is titled "Image Only Field" and contains the following fields and controls:

- Name:** A text box containing "Field1" and a checkbox labeled "Indexed".
- Display name:** A text box containing "Field 1".
- Use:** Two radio buttons: "May not be removed" (selected) and "May be removed".
- Allow:** Two radio buttons: "Only one" (selected) and "More than one".
- Default Image Location:** A text box and a button labeled "From File...".
- Caption:** A text box containing "Image:".
- Buttons:** "OK" and "Cancel" at the bottom right.


Fields on the Image Only Dialog

Field	Description
Name	<p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,:;"'{}[]\`~) into this field.</p> <p>The Name Field's Default Value</p> <p>By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field's default name is Field1, the second field's default name is Field2, etc. You can change the default if you want.</p>
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The Indexed field may or may not appear, depending on how your administrator has set up your system.</p>
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 289
Allow	See "The Allow Field" on page 290
Default Image Location	<p>If desired, you can insert a default image, which might be the most common image or simply a reminder that an image needs to be inserted.</p> <p>To help find the image, click the From File button and navigate to image file.</p> <p>You can only insert an image file whose extension appears between the <code><validext></code> tags in the configdatadesign.xml file. For example:</p> <pre><validext>gif,jpg,png,jpeg,jpe,doc,txt </validext></pre>
Cannot be blank	If you want to require the user completing this field to enter a response, click inside this check box.
Caption	<p>Enter text to describe this item on the data entry screen.</p> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p>

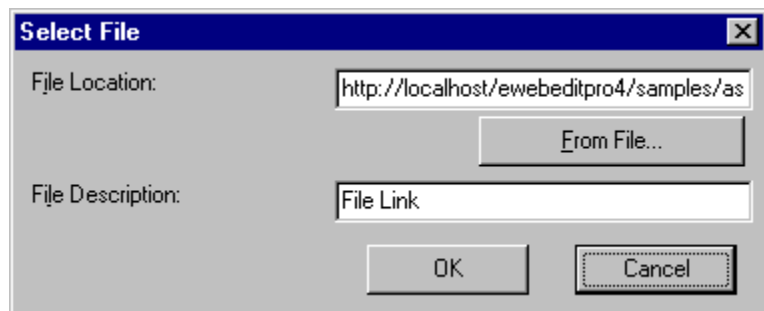
File Link Field

Use a File Link field to place an icon on the screen which the user in Data Entry mode can use to link to any file, such as a Microsoft Word document or a .gif image file. (You can also use an Image Only field to let the user insert an image. [“Image Only Field \(\)” on page 282](#))

Using a File Link Field in Data Entry Mode

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

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



Dialog Box

File Link Field

Name: ☐ Indexed

Display name:

Use

☒ May not be removed

☐ May be removed

Allow

☒ Only one

☐ More than one

Default File Location:

Default File Description:

Caption:

Fields on the File Link Field Dialog

Field	Description
Name	<p>Enter the name of the field.</p> <p>Note that you cannot enter spaces nor most special characters (!@#\$%^&*()+=<>,:;'"{}[]\`~) into this field.</p> <p>The Name Field's Default Value</p> <p>By default, the Data Designer assigns a name made up of Field followed by the next available number. So, the first field's default name is Field1, the second field's default name is Field2, etc. You can change the default if you want.</p>

Field	Description
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The indexed field may or may not appear, depending on how your administrator has set up your system.</p>
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 289
Allow	See "The Allow Field" on page 290
Default File Location	<p>If desired, you can insert a default link, which can be the most common link or simply an example.</p> <p>To help find the link, click the From File button and navigate to file. You can only insert a file whose extension appears between the <code><validext></code> element of the configdatadesign.xml file. For example:</p> <pre><validext>gif,jpg,png,jpeg,jpe,pdf,doc </validext></pre>
Cannot be blank	If you want to require the user completing this field to enter a response, click inside this check box.
Default File Description	If desired, enter text that the user will be able to click on to access the linked file.
Caption	<p>Enter text to describe this item on the data entry screen.</p> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p> <hr/> <p>Note: The Caption field only appears on this dialog when you create the File Link field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.</p> <hr/>

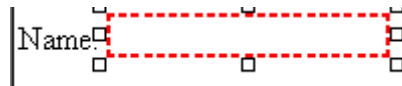
Field	Description
Indexed	<p>Check if you want to index this field. For more information, see "Indexing the Fields of a Data Design Document" in the Supporting the Data Designer chapter of the Developer Reference Guide.</p> <p>The indexed field may or may not appear, depending on how your administrator has set up your system.</p>
Display name	Enter the text that appears when a user hovers the cursor over this field.
Use	See "The Use Field" on page 289
Allow	See "The Allow Field" on page 290
Default File Location	<p>If desired, you can insert a default link, which can be the most common link or simply an example.</p> <p>To help find the link, click the From File button and navigate to file. You can only insert a file whose extension appears between the <code><validext></code> element of the configdatadesign.xml file. For example:</p> <pre><validext>gif,jpg,png,jpeg,jpe,pdf,doc </validext></pre>
Cannot be blank	If you want to require the user completing this field to enter a response, click inside this check box.
Default File Description	If desired, enter text that the user will be able to click on to access the linked file.
Caption	<p>_____y screen.</p> <p>After you insert this field onto the screen, you can use eWebEditPro+XML's formatting capabilities to modify its size, font, color, and other attributes.</p> <p>_____</p> <p><i>note: The Caption field only appears on this dialog when you create the File Link field. If you later try to edit the field, the Caption field is not on the dialog. However, you can edit the Caption text within the editor.</i></p>

Field	Description
Data Style	<p>See “The Data Style Field” on page 291</p> <hr/> <p>Note: The Data Styles button only appears if the Remove Styles field on the Application Setup screen is unchecked. If the Remove Styles field is checked, styles are removed when the content is saved.</p> <hr/>

Deleting a Field from the Screen

To remove a field from the screen, follow these steps.

1. Move the cursor to the field.
2. When the cursor changes to a four-headed arrow, click the mouse.
3. Small boxes surround the field.



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

Usually, the field label is not deleted when you delete a field. To delete the label, use standard **eWebEditPro+XML** editing buttons.

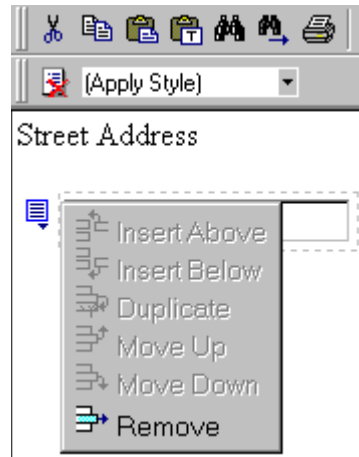
Fields that Appear on Several Dialogs


The Use Field


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


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

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



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


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

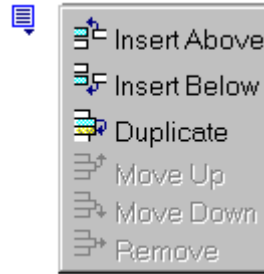
NOTE The menu icon () can also indicate that the user can add instances of a field (see the Allow field, below). So, if a field is required, the icon could appear but omit a **Remove** option.


The Allow Field


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

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

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



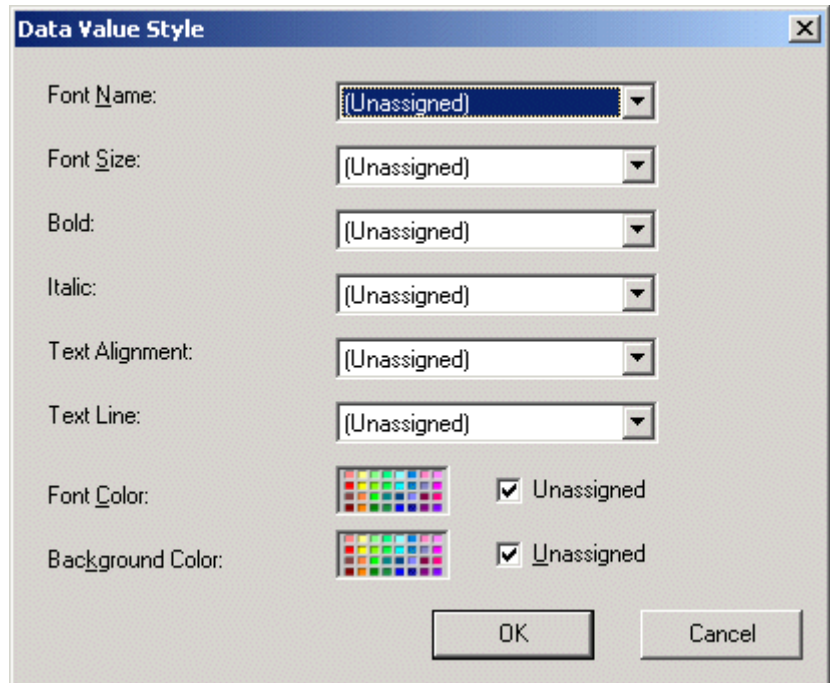
If the user entering data clicks , a menu appears (shown above), which lets the user add instances of the field to the screen.

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

The Data Style Field

NOTE The Data Styles button only appears on dialogs if the **Remove Styles** field on the Application Setup screen is unchecked. If the **Remove Styles** field is checked, styles are removed when the content is saved, so it doesn't make sense to enter styles in that case.

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

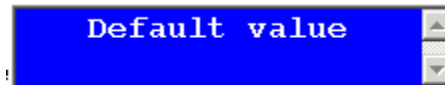


Use the dialog to assign the following formatting attributes to a user response field.

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

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

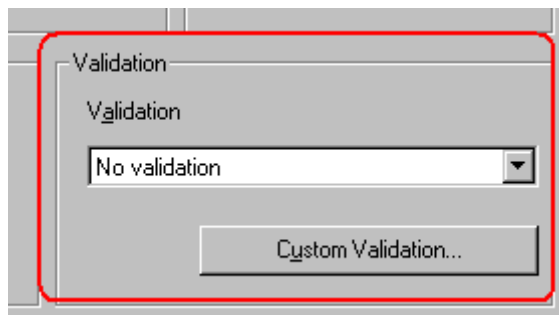
Below is an example of a response field whose font, size, alignment, background, and foreground colors were modified via this dialog.



Custom Validation

NOTE Your Web developer can customize validation options. For details, see the [Ektron CMS400.NET Developer's Guide](#) section "Customizing Validation."

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



You can use the validation feature to ensure the following about the user's input.

- The data type - the default types are
 - text
 - URL
 - whole number
 - decimal number
 - floating point number (Floating point includes scientific notation, so is appropriate for scientific numbers. Decimals usually suffice for business numbers.)

NOTE Your system administrator may customize the choices.

- The field value has one of the following relationships with another field, a number, or an expression - the default expressions are

- between two values (either another field or a number that you specify)
- less than
- equal to
- not equal to
- maximum length (usually for text responses)

NOTE Your system administrator may customize the choices.

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

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

The screenshot shows a dialog box titled "Custom Validation" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Data Type" and "Validation".

The "Data Type" section contains a label "Data Type:" followed by a dropdown menu currently showing "Whole number".

The "Validation" section contains a label "Condition:" followed by a text input field. Below this is a button labeled "Select Field...".

Below the "Select Field..." button is a label "Examples" followed by a dropdown menu.

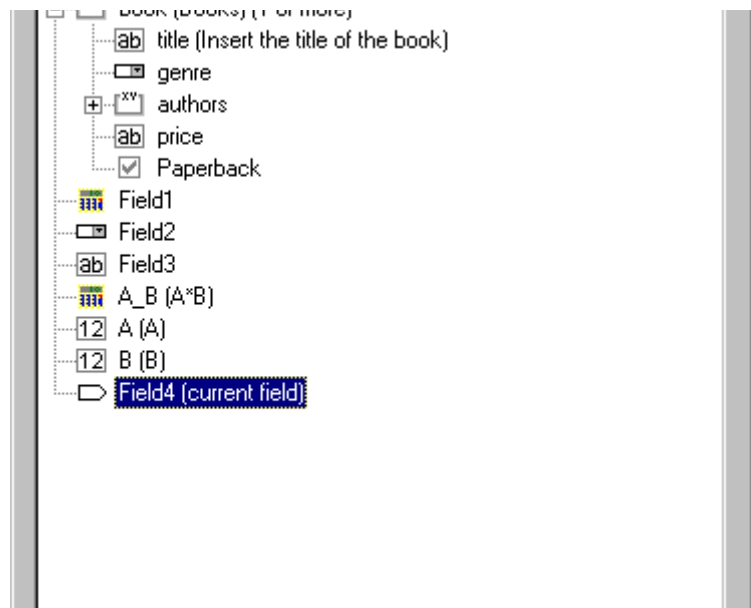
At the bottom of the "Validation" section is a label "Error Message:" followed by a text input field.

At the bottom right of the dialog are two buttons: "OK" and "Cancel".

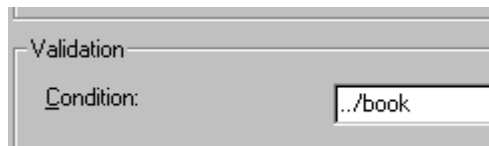
- The **Data Type** field is the value's basic type, for example, text number or URL.
- The **Condition** field displays the validation logic.

- The **Examples** drop-down list shows validation expressions that the data design creator can apply to the field.
- Any **Error Message** displays in Data Entry mode when the user inserts an invalid value.

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



This dialog displays fields that can be inserted into the **Condition** field. Some field types, like the Rich Area field, are not listed. See *Also: "Referencing Other Calculated Fields" on page 275*



Example of Creating Custom Validation

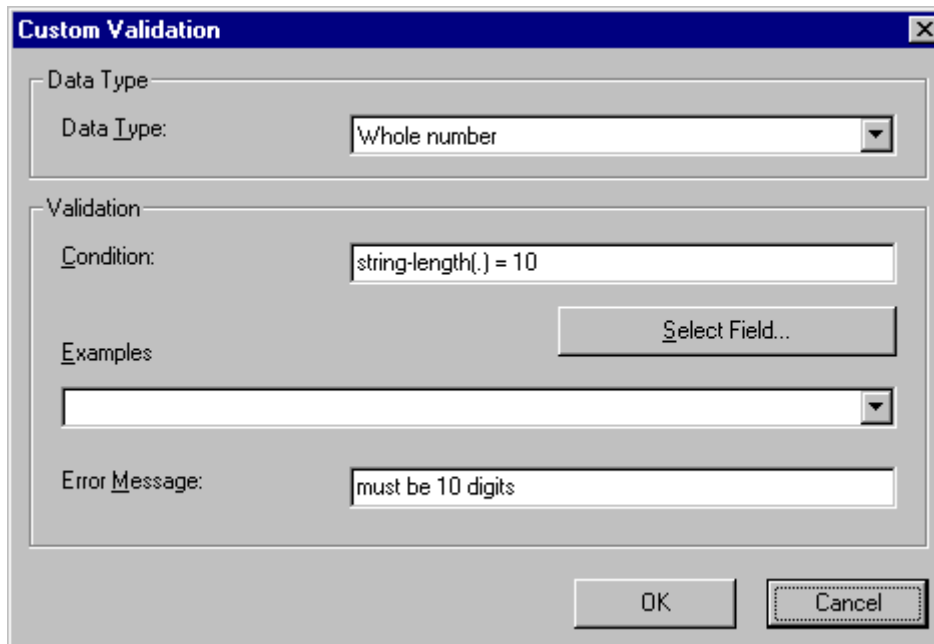
As an example of custom validation, assume that a field collects telephone numbers, and you want to make sure the user enters 10 digits. To accomplish this, follow these steps.

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

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

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

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



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

Working with HTML Forms

Ektron CMS400.NET's HTML Forms feature lets users create and maintain HTML forms to collect information from visitors to your Web site.

This section only describes the following technical topics relating to forms. For more information about using HTML forms, see the **Ektron CMS400.NET** User Manual.

- ["Form Permissions" on page 298](#)
- ["Forms Must Use Template with FormBlock Server Control" on page 299](#)
- ["Preparing the Server to Send email" on page 300](#)
- ["Implementing a Form on a Web Page" on page 301](#)
- ["Sending Data as XML" on page 302](#)
- ["Redirecting Submitted Form Data" on page 310](#)

Form Permissions

Folder Permissions

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

Administrator Permissions

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

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

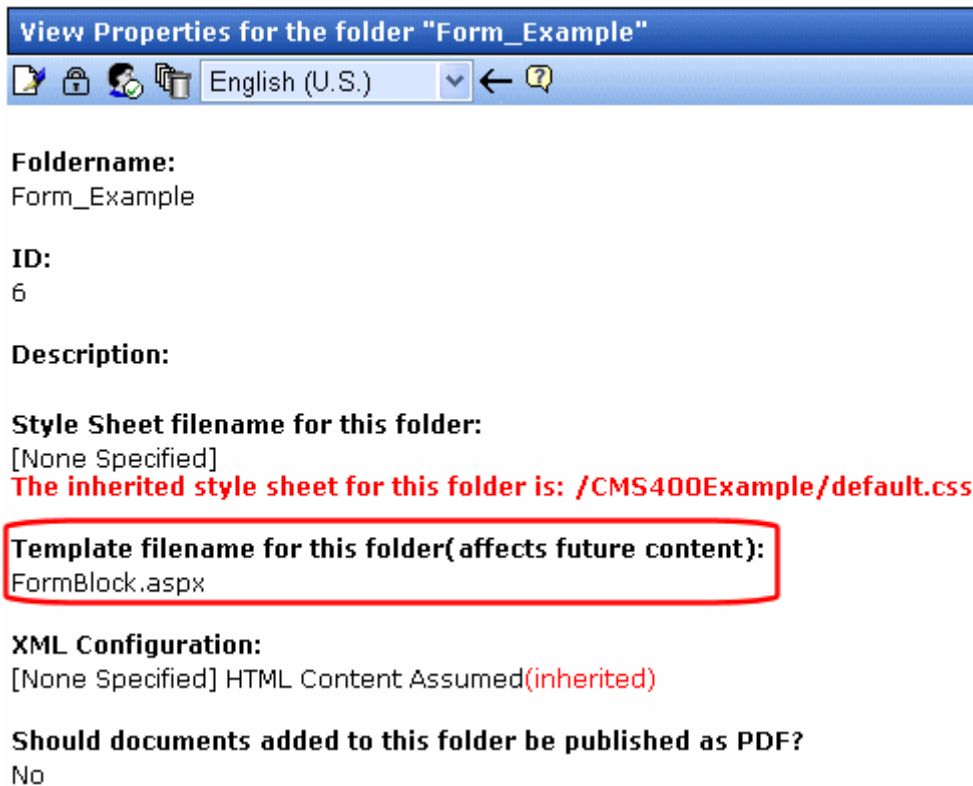
You may also perform all actions on a form's content.

User Permissions

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

Forms Must Use Template with FormBlock Server Control

HTML forms *must* reside in a folder whose template uses the FormBlock server control or function. In the Intranet sample site supplied with **Ektron CMS400.NET**, the Form Example folder uses such a template, FormBlock.aspx (illustrated below).



View Properties for the folder "Form_Example"

English (U.S.)

Foldername:
Form_Example

ID:
6

Description:

Style Sheet filename for this folder:
[None Specified]
The inherited style sheet for this folder is: /CMS400Example/default.css

Template filename for this folder(affects future content):
FormBlock.aspx

XML Configuration:
[None Specified] HTML Content Assumed(inherited)

Should documents added to this folder be published as PDF?
No

You can modify this template as needed or create your own form template and assign it to any folder on its Folder Properties screen.

Since, by default, folders inherit properties from their parent folder, any new folders created under a parent folder use the correct template. Of course, you can break inheritance and assign a custom template for any folder.

Preparing the Server to Send email

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

WARNING!

A form typically includes fields for source and destination email addresses, which are used to transmit the form via email. An unscrupulous attacker can post a form

to a Ektron CMS400.NET page and send email *from* any email address *to* any email address. The attacker's form can be on an HTML page on a server that is remote from the Ektron CMS400.NET installation. Any **Ektron CMS400.NET** on a public site that includes the Ektron CMS400.NET sample site with the form.aspx page and properly configured SMTP can be used to send spam.

Implementing a Form on a Web Page

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

NOTE

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

1. Open the Web form template on which you want the Form content to appear. (This example uses support.aspx.)
2. Place the FormBlock server control or custom function for a Form content within the body of the template. Below is an example of what the form might look like.

IMPORTANT!

Ektron recommends using the Poll server control when displaying a form that is being used as a form or a survey.

Home | Products | **Support** | News | Careers | Search | Calendar

Support Request Form

This is a sample support request form for RC International. Validation is set for most fields for t

Name: *cannot be blank*

Email: *format as email@yourcompany.xx*

Product: *must select product from list*

Purchase Date: *format as MM/DD/YYYY*

Purchase Price: *format as \$DDD.CC*

Visa / Mastercard: *format as 4111111111111111*

Notes:

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

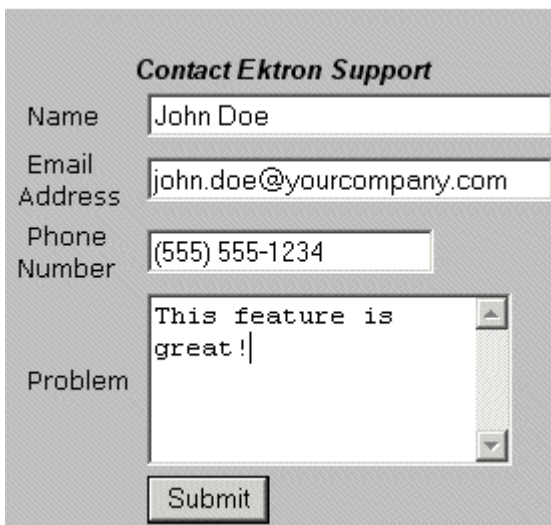
Sending Data as XML

While creating a form that generates email, you can specify that the email be sent as XML data or plain text.

XML has the following advantages over plain text.

- Because XML data is structured, you can easily parse the content to store and retrieve important information.
- If you download the form data to an Excel spreadsheet, the XML tags become the spreadsheet's column headers. See *Also: Ektron CMS400.NET User Manual Section "Working with HTML Forms" > "Viewing Form Reports" > "Exporting Form Reports"*.

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



Contact Ektron Support









Name

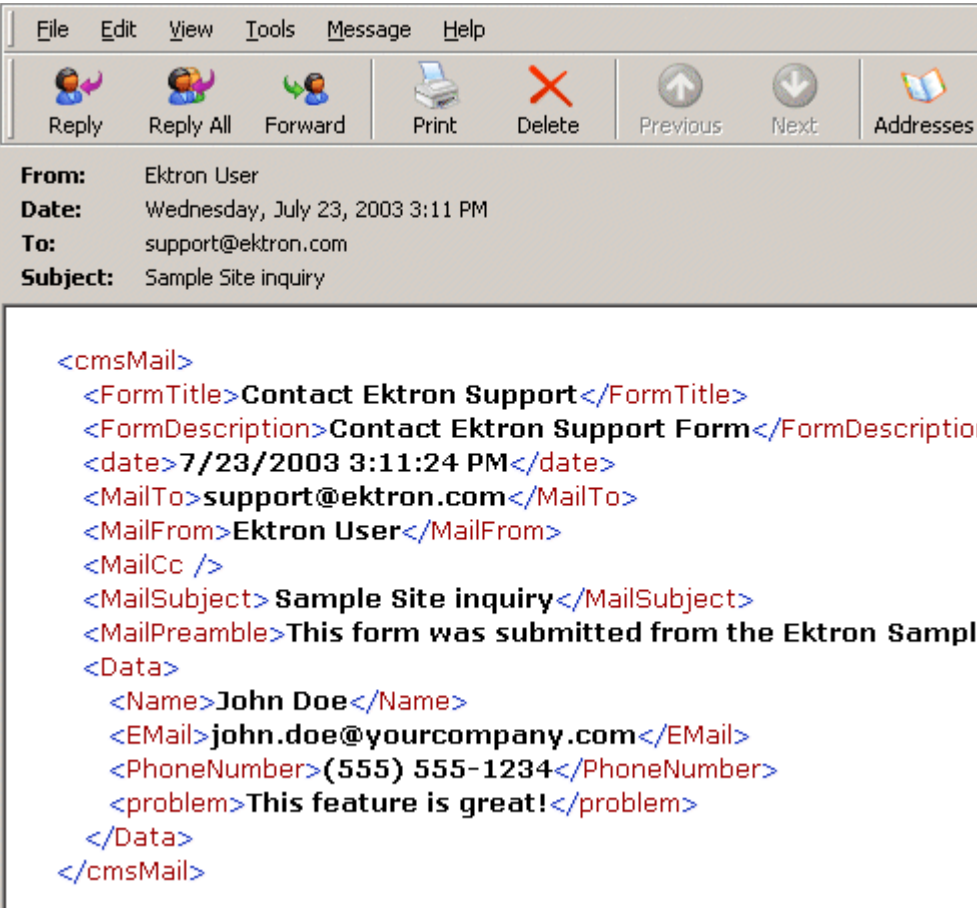
Email Address

Phone Number

Problem

The following table displays the resulting email, depending on the method used.

Form sent as	Generated email								
Plain Text	<div> <div>File Edit View Tools Message Help</div> <div>  Reply  Reply All  Forward  Print  Delete  Previous  Next  Addresses </div> </div> <div> From: Ektron User Date: Wednesday, July 23, 2003 3:19 PM To: support@ektron.com Subject: Sample Site inquiry </div> <p>This form was submitted from the Ektron CMS Sample Web site.</p> <p>7/23/2003 3:19:08 PM</p> <table> <tr> <td>Name</td><td>John Doe</td></tr> <tr> <td>Email</td><td>john.doe@yourcompany.com</td></tr> <tr> <td>PhoneNumber</td><td>(555) 555-1234</td></tr> <tr> <td>problem</td><td>This feature is great!</td></tr> </table>	Name	John Doe	Email	john.doe@yourcompany.com	PhoneNumber	(555) 555-1234	problem	This feature is great!
Name	John Doe								
Email	john.doe@yourcompany.com								
PhoneNumber	(555) 555-1234								
problem	This feature is great!								

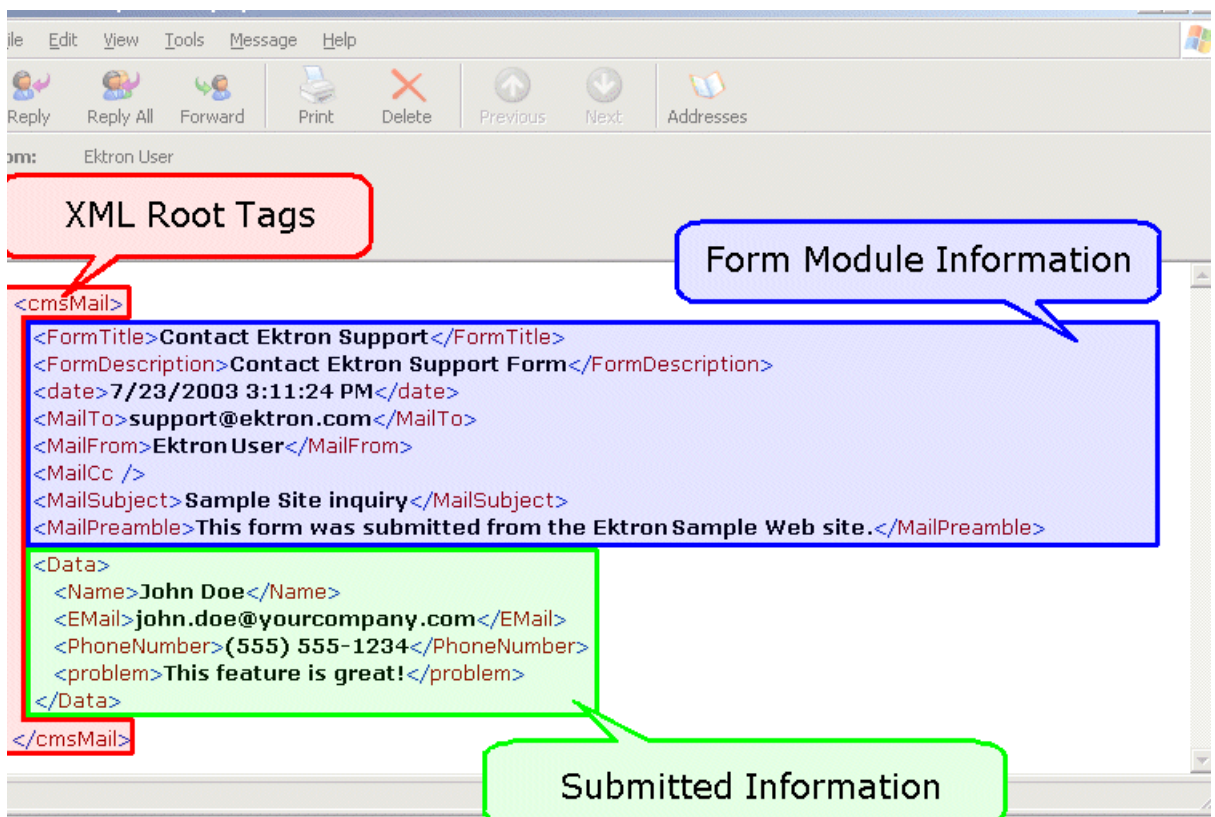
Form sent as	Generated email
XML	 <p>The screenshot shows an email client window with a menu bar (File, Edit, View, Tools, Message, Help) and a toolbar with icons for Reply, Reply All, Forward, Print, Delete, Previous, Next, and Addresses. The email header information is as follows:</p> <p>From: Ektron User Date: Wednesday, July 23, 2003 3:11 PM To: support@ektron.com Subject: Sample Site inquiry</p> <p>The body of the email contains the following XML structure:</p> <pre><cmsMail> <FormTitle>Contact Ektron Support</FormTitle> <FormDescription>Contact Ektron Support Form</FormDescription> <date>7/23/2003 3:11:24 PM</date> <MailTo>support@ektron.com</MailTo> <MailFrom>Ektron User</MailFrom> <MailCc /> <MailSubject> Sample Site inquiry</MailSubject> <MailPreamble>This form was submitted from the Ektron Sampl <Data> <Name>John Doe</Name> <Email>john.doe@yourcompany.com</Email> <PhoneNumber>(555) 555-1234</PhoneNumber> <problem>This feature is great!</problem> </Data> </cmsMail></pre>

XML email Structure

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

- Form and mail elements
- Data elements

The following image illustrates the sections of XML email structure.



The following explains the sections of the XML email.

Root Tag

The XML email is wrapped in `<cmsMail>` root tags.

Form and Mail Tags

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

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

The screenshot shows a web application interface with a sidebar on the left containing links like 'Content', 'Library', 'Rules', 'Collections', 'Calendars', 'Forms', 'Ports', 'Groups', and 'Configuration'. The main area displays form information in two sections:

Form information in Workarea

Title: Contact Ektron Support
Description: Contact Ektron Support Form
ID: 1

Mail Properties

To: support@ektron.com
From: Ektron CMS300 User
CC:
Subject: CMS300 Sample Site inquiry
Preamble: This form was submitted from the Ektron CMS300 Sample Web site.

Below the mail properties, there is a checkbox labeled 'Send data in XML format' which is checked.

Form information in XML Email

The XML email content is shown as follows:

```
<FormTitle>Contact Ektron Support</FormTitle>
<FormDescription>Contact Ektron Support Form</FormDescription>
<date>7/23/2003 3:11:24 PM</date>
<MailTo>support@ektron.com</MailTo>
<MailFrom>Ektron CMS300 User</MailFrom>
<MailCc />
<MailSubject>CMS300 Sample Site inquiry</MailSubject>
<MailPreamble>This form was submitted from the Ektron CMS300 Sample Web site.</MailPreamble>
```

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

XML Tag	Description
<FormTitle>	Title given to the form that was submitted.
<FormDescription>	Description given to the form that was submitted.
<date>	Date and time the form was submitted.
<MailTo>	To email address(es) defined in the form.
<MailFrom>	From email address(es) defined in the form.
<MailCc>	CC address(es) defined in the form.

XML Tag	Description
<MailSubject>	Subject for the generated email defined in the form.
<MailPreamble>	Preamble for the generated email defined in the form.

Data Tags

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

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

The diagram illustrates the process of submitting data from a web form. It shows three main components:

- Form in eWebEditPro:** The HTML code for the form is shown in a text editor. The code defines a table with four rows for Name, Email Address, Phone Number, and Problem. Each row contains a text input field with a specific name attribute.
- Form on Web Page:** A screenshot of the rendered web form titled "Contact Ektron Support". The fields are filled with the following data: Name (John Doe), Email Address (john.doe@yourcompany.com), Phone Number ((555) 555-1234), and Problem (This feature is great!). A "Submit" button is at the bottom.
- Data Submitted by Form:** An email interface showing the data submitted from the form converted into XML tags. The email header includes "From: Ektron CMS300 User", "Date: Wednesday, July 23, 2003 3:11 PM", "To: support@ektron.com", and "Subject: CMS300 Sample Site inquiry". The body of the email contains the following XML structure:


```
<cmsMail>
  <FormTitle>Contact Ektron Support</FormTitle>
  <FormDescription>Contact Ektron Support Form</FormDescription>
  <date>7/23/2003 3:11:24 PM</date>
  <MailTo>support@ektron.com</MailTo>
  <MailFrom>Ektron CMS300 User</MailFrom>
  <MailCc />
  <MailSubject>CMS300 Sample Site inquiry</MailSubject>
  <MailPreamble>This form was submitted from the Ektron CMS
  <Data>
    <Name>John Doe</Name>
    <Email>john.doe@yourcompany.com</Email>
    <PhoneNumber>(555) 555-1234</PhoneNumber>
    <problem>This feature is great!</problem>
  </Data>
```

Arrows indicate the flow of data from the HTML code to the web form, and from the web form to the email submission.

As shown in the graphic, the content is comprised of four form elements that are converted to XML tags:

- Name
- Email
- PhoneNumber
- Problem

Redirecting Submitted Form Data

This section explains how to set up the ability to redirect submitted form data to an action page. Because the data is redirected via server transfer, you can easily customize the handling of a multi-page form.

Users can select this option when creating or editing a form response, as illustrated below.

Response

Step 4 of 5

Choose the type of response to display when form data is submitted. You can change the response later if you wish.

☐ Display a message
☐ Redirect to a file or page
☒ Redirect to an action page and forward form data

(Apply Style) Normal Verdana 2 (10 pt)


Instructions for how a user chooses a hyperlink to an action page are in the **Ektron CMS400.NET User Manual** section “Working with HTML Forms” > “Creating a New Form” > “Redirecting to an Action Page and Forwarding Form Data”.

NOTE If a form's specifications indicate that its data is saved to a database, the data is saved before being forwarded to an action page.

The following section explains how an administrator sets up a hyperlink to the action page in preparation for a user's selection.

Setting Up the Action Page

1. Create the action page. It must
 - load and use the form variables

- have an .aspx extension
 - reside in the same web application as your Web site
2. Place the action page in your Web site's root folder.
 3. Set up a library hyperlink to the .aspx page. Here's how to do that:
 - In **Ektron CMS400.NET**, go to the Library.
 - Select **Hyperlinks** from the file type dropdown.
 - Click the Add button ().
 - In the **URL Link** field, enter the path relative to the Web root to the .aspx file you created in Steps 1 and 2. For example:
`http://localhost/CMS400Example/ServerVariables.aspx`
 - Give the hyperlink a title and save it.
 4. Inform your users of the hyperlink. They will select it when selecting the form response.

Ektron Explorer

The **Ektron CMS400.NET** User Manual section “Using Ektron Explorer” provides the following information:

- general description
- installation directions
- how to view it

Since that information is not repeated here, you should read that before reading this section.

This section has the following topics:

- ["Providing the Ektron Explorer Installation File to Users" on page 312](#)
- ["Access to Ektron CMS400.NET" on page 312](#)
- ["Configuring Ektron Explorer" on page 313](#)

Providing the Ektron Explorer Installation File to Users

To install Ektron Explorer, users need a copy of the EktronExplorer.exe file. This is installed to the utilities folder within the folder to which **Ektron CMS400.NET** is installed. By default, the path to EktronExplorer.exe is `C:\Program Files\Ektron\CMS400v50\Utilities`.

Access to Ektron CMS400.NET

By default, when someone signs on to Ektron Explorer, the sign-in uses a special membership user, EkExplorerUser. This user has read-only access to every folder as a membership

user. So he can *view* all published content, both public and private, but not *edit* content.

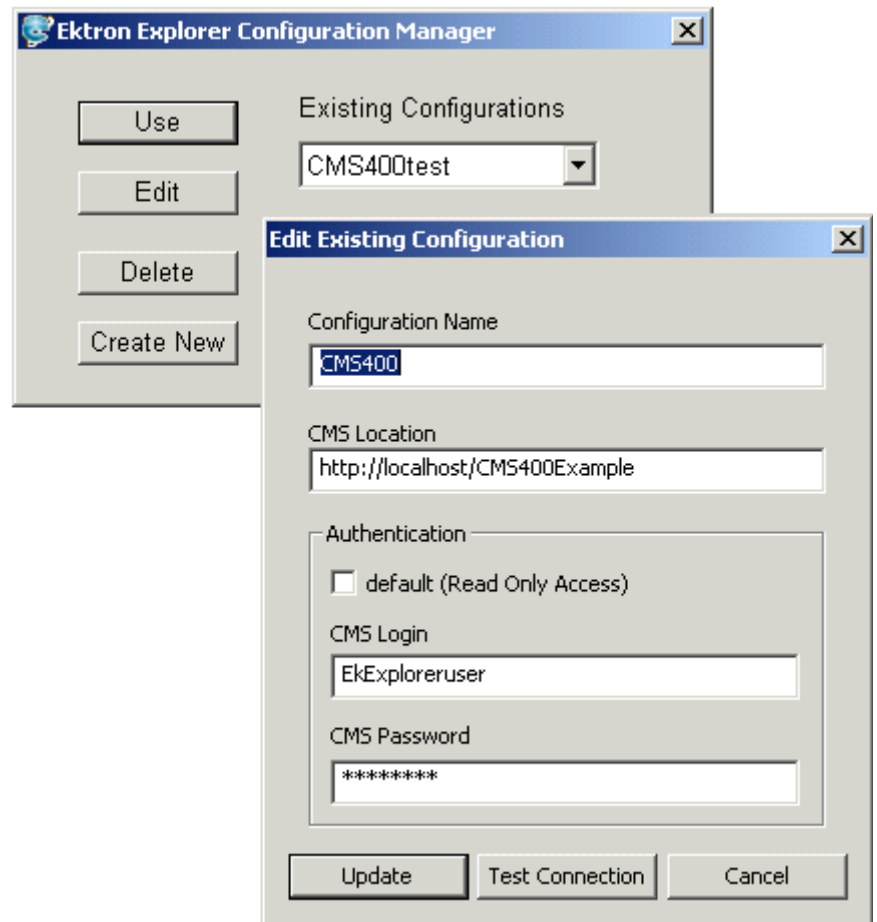
To change the user who is signing in, use the Configuration Manager. See Also: "[Configuring Ektron Explorer](#)" on page 313

Configuring Ektron Explorer

When the Ektron Explorer is installed to a client PC, it assumes the following information:

- location of **Ektron CMS400.NET** - specified during installation
- username and password - a default user is created in **Ektron CMS400.NET** for the purpose of viewing CMS content. That user cannot edit the content.

You can change these values using the Explorer's Configuration Manager (illustrated below).



If you change the password and Login name in an existing or new configuration, users who sign on with that configuration have CMS editing privileges assigned to the user.

For example, a user whose user name and password you enter has permission to edit all content in **Ektron CMS400.NET**. To edit the content, the user browses to it, clicks its description in the right frame, and then views the content in a new browser. The content is surrounded by a colored border that indicates if it is eligible for editing. For more information, see ["Recognizing Content" on page 14](#).

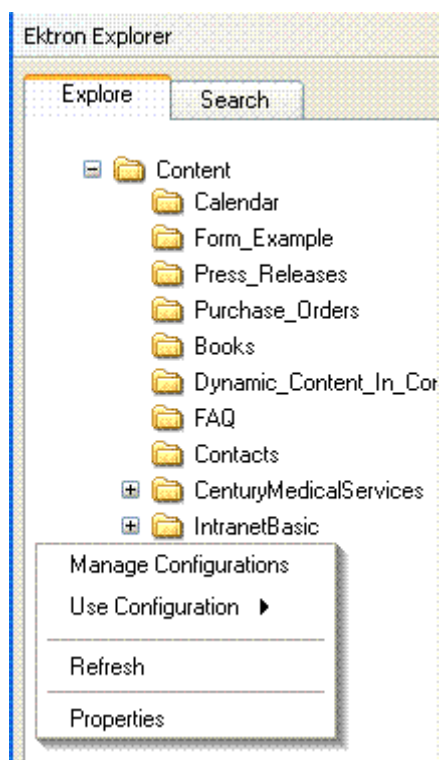
NOTE To learn how to access **Ektron CMS400.NET** content from the Ektron Explorer, see the **Ektron CMS400.NET** User Manual section "Using Ektron Explorer".

Accessing the Configuration Manager

Click the Windows **Start** button then follow this path:

Programs > Ektron > Ektron Explorer > Configuration Manager

When Explorer is open, you can access Configuration Manager by placing the cursor in the left frame and right clicking the mouse.



Configuration Manager Options

The Explorer Configuration Manager provides four buttons, described below.

Button	Description
Use	Lets you determine, via the Existing Configurations dropdown list, which CMS to explore. See Also: "Switching Between Configurations" on page 318
Edit	For any configuration, change the name, location or authentication information. See Also: "Editing a Configuration" on page 316
Delete	Remove a configuration. See Also: "Deleting a Configuration" on page 319
Create New	Create a new configuration. See Also: "Creating a New Configuration" on page 317

Editing a Configuration

To edit an existing configuration, follow these steps.

1. Access the Configuration Manager as described in ["Accessing the Configuration Manager" on page 315](#).
2. Click the **Edit** button.
3. The Edit Existing Configuration screen appears. Use the following table to guide you through each field.

Fields on the Edit Existing Configuration Screen

Field	Description
Configuration name	Update the configuration name. You use this name to identify which configuration to log into.

Field	Description
CMS Location	<p>Enter the full path to the Ektron CMS400.NET version that you will access via this configuration. For example, <code>http://bills_computer/cms400example</code>.</p> <p>The default location is the local PC: <code>http://localhost/CMS400Example</code></p> <p>You can also use a static IP address followed by the root folder of your Web site. For example: <code>http://192.168.25.874/CMS400Example</code></p>
Authentication	
default (Read Only Access)	<p>Check this checkbox if, when accessing Ektron Explorer via this configuration, you want to submit the default user name and password. In this case, you can view all CMS content but not edit.</p> <p>If you want to edit CMS content, change the CMS login name and password to that of a user with editing privileges.</p>
CMS Login	<p>(Only available if default is not checked.)</p> <p>Enter your CMS username, as entered in the CMS Add/Edit User screen. See Also: "Creating a New User" on page 114</p> <p>Within Ektron Explorer, you will have the same privileges for working with content that you have in Ektron CMS400.NET. See Also: "Setting Permissions" on page 86</p>
CMS Password	<p>(Only available if default is not checked.)</p> <p>Enter your CMS password, as entered in the CMS Add/Edit User screen. See Also: "Creating a New User" on page 114</p> <p>Within Ektron Explorer, you will have the same privileges for working with content that you have in Ektron CMS400.NET. See Also: "Setting Permissions" on page 86</p>

Creating a New Configuration

You might want to create a new configuration to

- sign in to a different instance of **Ektron CMS400.NET** (for example, one on a different computer)
- sign in as a different user

To create a new configuration, follow these steps.

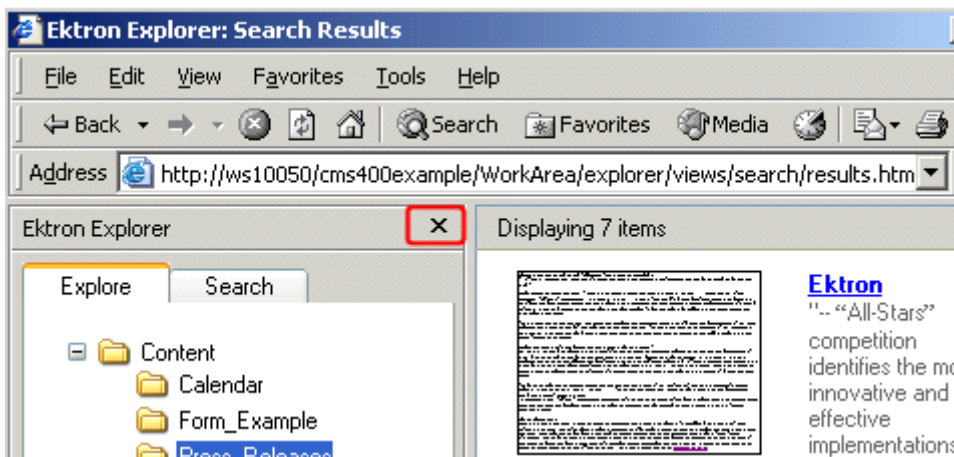
1. Access the Configuration Manager, as described in ["Accessing the Configuration Manager" on page 315](#).
2. Click **Create New**.
3. Complete the fields on the screen. See ["Fields on the Edit Existing Configuration Screen" on page 316](#).
4. Press the **Test Connection** button. When you do, the CMS location, username, and password are tested for validity.
5. Click the **Add New** button.

[Switching Between Configurations](#)

Switching Between Configurations

If you have two or more configurations and want to sign off one and sign on to the other, follow these steps.

1. Click the small **X** on the top right corner of the Ektron Explorer frame (illustrated below).



2. The Ektron Explorer closes.

3. Access the Configuration Manager, as described in "[Accessing the Configuration Manager](#)" on page 315.
4. Pull down the **Existing Configurations** drop down list and select the configuration that you want to use.
5. Click the **Use** button.
6. Sign back on to Ektron Explorer.

Deleting a Configuration

1. Access the Configuration Manager, as described in "[Accessing the Configuration Manager](#)" on page 315.
2. Pull down the **Existing Configurations** drop down list and select the configuration that you want to delete.
3. Click the **Delete** button.

Document Management Administration

This section explains the administration of the Document Management functionality in **Ektron CMS400.NET**. It includes the following sections:

- ["Asset Management Configuration" on page 320](#)
- ["Asset Management Server \(AMS\) Registration" on page 324](#)
- ["Checking Document Management Permissions" on page 330](#)
- ["PDF Generation" on page 336](#)
- ["Troubleshooting" on page 349](#)

Asset Management Configuration

This section explains configuring Asset Management. By changing these settings, you can:

- update Asset Management server settings
- change which file types are allowed on the Asset Management server
- set the View Type

There are two ways you can configure an Asset Management server:

- the Asset Server Setup screen in the Workarea. See Also: ["Updating Asset Configuration Settings" on page 321](#)
- the AssetManagement.Config file. See Also: ["The AssetManagement.Config File" on page 322](#)

In either case, you are editing the AssetManagement.Config file. While the Workarea screen provides a simple way to update this

information, some tags can only be updated in the AssetManagement.Config file. The table in "The AssetManagement.Config File" on page 322 indicates which tags can be edited in the Workarea.

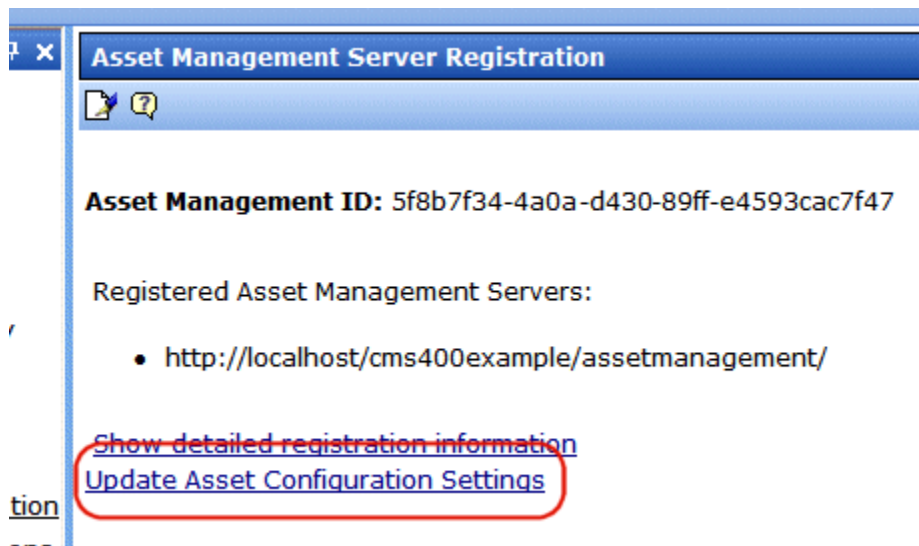
Updating Asset Configuration Settings

You can update some AssetManagement.Config tags from the Ektron CMS400.NET Workarea. To do that, follow these steps.

NOTE

Only members of the Administrator User Group can view, add, or edit the Asset Server Setup.



1. In the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Update Asset Configuration** link.



3. The **Asset Management Configuration** screen appears.









	Tag	Value	Description
	CatalogLocation	c:/assetcatalog//	Index Server catalog location used to keep indexing info
	CatalogName	680819212Asset	Index Server catalog name used for indexing Assets
	DomainName	. . .	AppDomain under which CMS is







4. Click the Edit button () for the tag you want to edit.
5. The **Value** field for that tag changes to a text box.
6. Change the information in the text box.
7. Click the Save button ()

For more information on each tag, see ["The AssetManagement.Config File" on page 322](#)

The AssetManagement.Config File

The following table describes the AssetManagement.Config file's tags.

Tag	Description	Editable within Workarea?
<WebAppPath>	The path of the Web application. This is the path to the Asset Management folder. For example: C:/Inetpub/wwwroot/AssetManagement.	
<WebApp>	The Asset Management folder. For example: /AssetManagement/.	
<StorageLocation>	The location of the Asset Library. For example: C:/assetlibrary/.	
<WebRoot>	The web root of the server. For example: C:/Inetpub/wwwroot/.	
<WebShareDir>	The folder where temporary data files that are waiting to be checked in, saved, or published are stored. For example: /dmdata/.	
<CatalogName>	The name of the Asset Catalog. This name is used when setting up the index service.	
<CatalogLoc>	The folder location of the Asset Catalog. This location is used when setting up the index service. For example: C:/assetcatalog/.	

Tag	Description	Editable within Workarea?
<PublishStorageLoc>	The folder location where published assets are stored. For example: C:/Inetpub/wwwroot/assets/.	
<PublishStorageName>	The name of the folder where published assets are stored. For example: C:/assets/.	
<DomainName>	Can be Domain Name, IP Address or Machine Name. An example is: localhost. This is the address a web client system uses to open managed documents through HTTP.	
<InstalledVersion>	The version number of the Ektron DMS400 installed.	
<FileTypes>	Files types that users are allowed to upload to Document Management. For more information, see "Allowing File Types" on page 324 . The default file types installed are *.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot,*.zip	
<UserName>	The user created during the install. If you let Ektron DMS400 install create the user, the default is EKT_ASSET_USER.	
<Password>	The password for the user created during the install. This password is encrypted during the install. If you are changing the user and need to encrypt a new password, use the dms400encryptpassword.exe encryption tool located in C:\Program Files\Ektron\CMS400v50\DMS400v11\utilities.	
<UserDomain>	The domain for the user created during the install.	
<PdfGenerator>	The location of the PDF generation software. If you are using local PDF generation software, the path shows the location of your local PDF generation software. If you are using Ektron's PDF generator, the default location is http://pdf.generator.ektron.com/PdfManager/PdfGenerator.aspx . For more information, see: <ul style="list-style-type: none"> • "Setting Up a Local PDF Generator" on page 339 • "Modifying the <PdfGenerator> Tag Information" on page 347 	

Allowing File Types

Administrators control which file types are allowed in the Document Management functionality by editing the AssetManagement.config file. Reasons for limiting the file types include:

- Security - For example, you do not want users to load .exe files to your Asset Management server
- Ease of Management - For example, you want your Asset Management server to store .doc files only

The `<FileTypes>` tag in the AssetManagement.config file contain the file types users can upload. The default file types are:

```
*.doc,*.xls,*.ppt,*.pdf,*.gif,*.jpg,*.jpeg,*.txt,*.log,*.vsd,*.dot,*.zip.
```

Steps to Add or Remove a File Type

To add or remove a file type from the list, follow these steps.

1. Edit in the **Workarea > Settings > Configuration > Asset Server Setup > Update Asset Configuration Settings** screen.
Or
1. Open the AssetManagement.config file. The default location is (webroot)/AssetManagement.
2. Find the `<FileTypes>` tag. All file types must appear between the tags. For example, `<FileTypes>*.doc,*.xls<FileTypes>.`

NOTE

use a comma to separate the file types. Also, file types must be formatted as wildcard.extension. For example, adding an .mp3 file type to the list after *.zip looks like this: *.zip,*.mp3

3. Add or remove any file type.
4. Save and close the AssetManagement.config file.



Asset Management Server (AMS) Registration

For administrators, initiating a connection to the Document Management functionality or changing your registration information

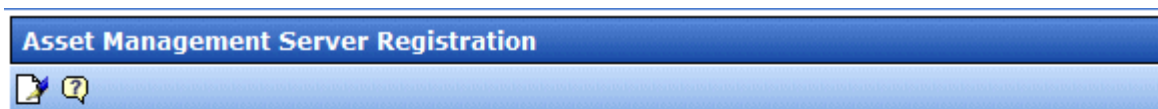
is easy. The following sections explain how to register and manage Document Management functionality with **Ektron CMS400.NET**.

The computer that stores the files maintained by the Document Management functionality is called an Asset Management Server.

Steps to Setup a New AMS Connection

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Add the location of Asset Management server in the **Asset Management Server Address (URL)** field.
4. Click **Save** (.

The following appears.



Asset Management ID: 55e05fc4-803d-4959-a818-3b70aa188a0b

Registered Asset Management Servers:

- <http://localhost/AssetManagement/>

[Show detailed registration information](#)

Click the **Show detailed registration information** link to see which plug-ins and extensions are registered. The following is an example.

ID	NAME	PLUGIN	CONNECTIONINFO
101	Office Documents	Documents	http://localhost/AssetManagement/
	NAME	EXT	MIME
			ICON
	msword	doc	application/msword
	msword	dot	application/msword
	ms-excel	xla	application/vnd.ms-excel
	ms-excel	xlc	application/vnd.ms-excel
	ms-excel	xlm	application/vnd.ms-excel
	ms-excel	xls	application/vnd.ms-excel
	ms-excel	xlt	application/vnd.ms-excel
	ms-excel	xlw	application/vnd.ms-excel
	ms-powerpoint	ppt	application/vnd.ms-powerpoint
	ms-powerpoint	pot	application/vnd.ms-powerpoint
	ms-powerpoint	pps	application/vnd.ms-powerpoint
	ms-project	mpp	application/vnd.ms-project
	msaccess	mdb	application/x-msaccess
	mspublisher	pub	application/x-mspublisher



Managing AMS Connections

From **Ektron CMS400.NET**, you can manage your Asset Management server connections. The following sections describe managing the Asset Management server.

- ["Updating Registration Information" on page 326](#)
- ["Register with an Asset Management Server \(AMS\)" on page 327](#)
- ["Update Registration with an AMS that has a New Address" on page 328](#)
- ["Unregistering an Asset Management Server" on page 328](#)
- ["Reregistering an AMS that has been Unregistered" on page 329](#)



Updating Registration Information

Updating registration information is useful when your Asset Management registration information gets corrupted or lost. Follow these steps to update your registration information.

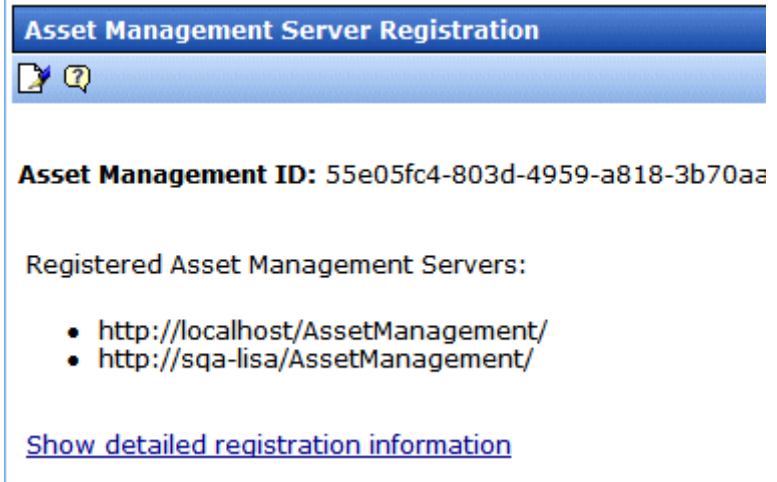
1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Update registration information** radio button.
4. Select an asset management server to update from the dropdown list.
5. Click **Save** ()

Register with an Asset Management Server (AMS)

Use this option to register **Ektron CMS400.NET** with a second AMS. This allows you to keep separate servers for different types of assets. For example, you might want to keep all the Human Resource documents on a separate server.

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Register with an asset management server (AMS)** radio button.
4. Add the location of the Asset Management server in the **Asset Management Server Address (URL)** field.
5. Click **Save** ()



The following appears.



The screenshot shows a dialog box titled "Asset Management Server Registration". Below the title bar, there are two icons: a document with a magnifying glass and a question mark. The main content area displays the "Asset Management ID: 55e05fc4-803d-4959-a818-3b70aa". Below this, it says "Registered Asset Management Servers:" followed by a bulleted list of two URLs: "http://localhost/AssetManagement/" and "http://sqa-lisa/AssetManagement/". At the bottom, there is a blue underlined link that says "Show detailed registration information".

Update Registration with an AMS that has a New Address

If you move your Document Management functionality to a new server or change the existing server's address, you can update the connection information by following these steps.

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ().
3. Select the **Update registration with an AMS that has a new address** radio button.
4. Select the AMS to update by choosing it from the **Select asset management server** dropdown box.
5. Add the new location of the AMS in the **Asset Management Server Address (URL)** field.
6. Click **Save** ().



Unregistering an Asset Management Server

If you decide not to use the Asset Management Server, you can unregister it from **Ektron CMS400.NET**. Unregistering the Asset

Management Server does not delete the information from the database nor the assets themselves.

When unregistering the Asset Management Server, you are making it inactive. This provides a way to restore the feature if you change your mind. See Also: "[Reregistering an AMS that has been Unregistered](#)" on page 329



The following steps explain how to unregister an Asset Management Server.

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Unregister an asset management server** radio button.
4. Select the AMS to update by choosing it from the **Select asset management server** dropdown box.
5. Click **Save** ()

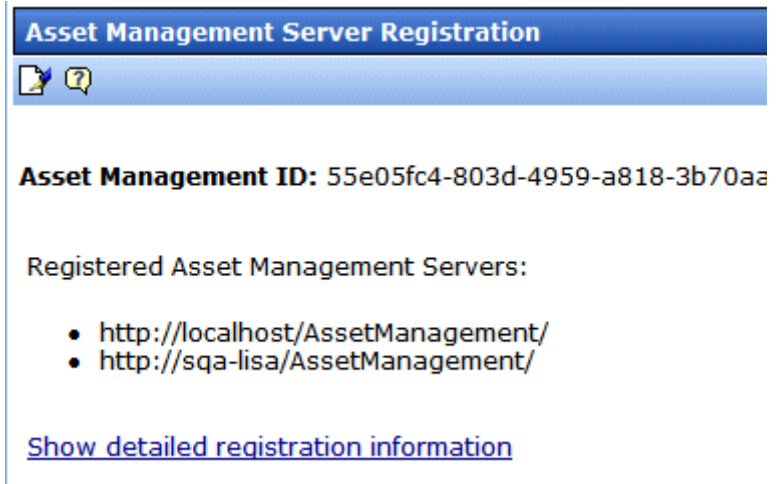
Reregistering an AMS that has been Unregistered

You can reregister an AMS that has been unregistered in **Ektron CMS400.NET**. Doing this re-establishes the information contained in the database. Your assets are again available to your users with the original content ID numbers assigned to them.

The following steps explain how to reregister an AMS.

1. From the Workarea, click **Settings > Configuration > Asset Server Setup**.
2. Click the **Edit** button ()
3. Select the **Register with an asset management server (AMS)** radio button.
4. Add the location of the AMS in the **Asset Management Server Address (URL)** field.
5. Click **Save** ()

The following appears.



Checking Document Management Permissions

If you are having any problems with permissions, use this section to verify that your user and folder settings are assigned properly.

See Also:

- "User Permissions" on page 330
- "User Settings" on page 332
- "Dmdata Folder Permissions" on page 332

User Permissions

When the Document Management functionality is installed, permissions are granted to several users for the following folders:

- `webroot/dmdata`
- `webroot/assets`
- `root/assetlibrary`

The assigned permissions vary depending on your server's operating system.

The following table lists users and their permissions. Scan down the column of your server's operating system to determine which

users and permissions should be enabled for the folders listed above.

You can use this information to help troubleshoot potential permission problems.

User	Needs these permissions	Windows 2000 Pro or XP Pro	Windows 2003 Server	Windows 2003 Enterprise Edition
IIS_WPG User	See "Advanced Permissions" on page 331		✓	✓
IUSR_ (You only need IUSR if impersonate is set to true in the Ektron CMS400.NET web.config file)	See "Advanced Permissions" on page 331	✓	✓	
IUSR_Group	See "Advanced Permissions" on page 331			✓
EKT_ASSET_USER	webroot/dmdata folder only: write only access	✓	✓	✓
ASP.NET User	See "Advanced Permissions" on page 331	✓		

Advanced Permissions

The following are extended permissions for use with the Document Management functionality.

- Traverse Folder / Execute File
- List Folder / Read Data
- Read Attributes

- Read Extended Attributes
- Create Files / Write Data
- Create Folders / Append Data
- Write Attributes
- Write Extended Attributes
- Delete Subfolder and Files
- Read Permissions

User Settings

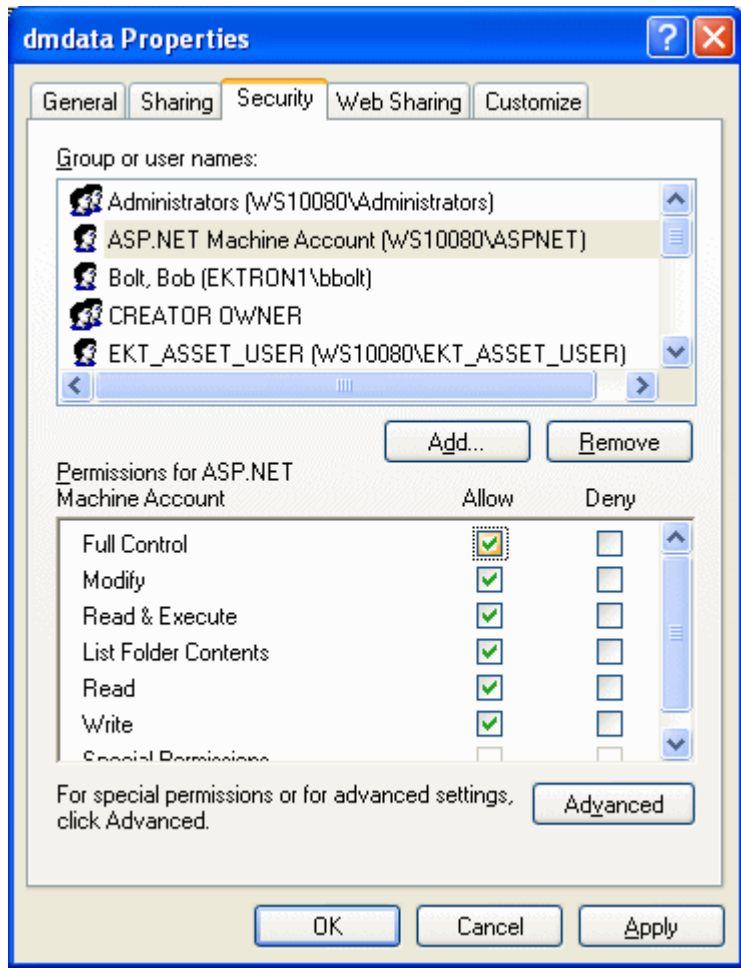
1. Right click **My Computer**, go to **Manage**, choose **Local Users and Groups**, and select the **Users** folder.
2. Right click the user defined within the `<Username>` tags of the `AssetManagement.config`. (By default, `EKT_ASSET_USER`.) Make sure this user's account is not disabled or locked out.

Dmdata Folder Permissions

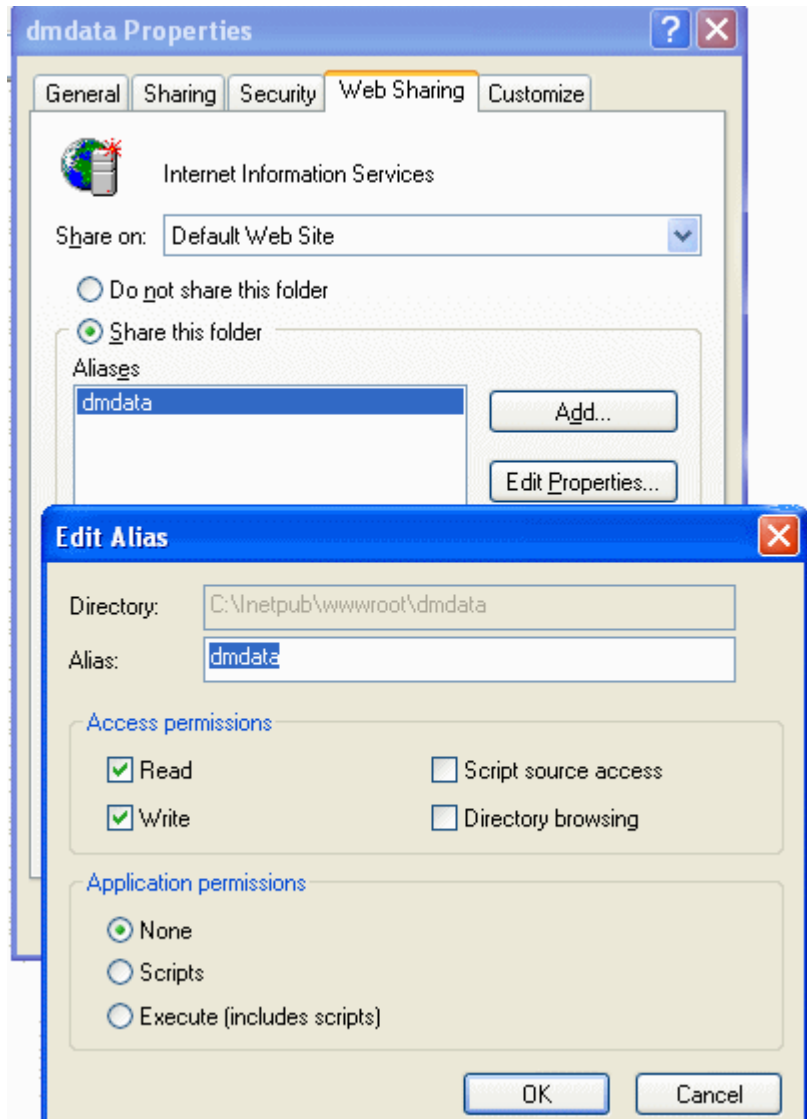
The `webroot/dmdata` folder should have settings or both the File System and IIS.

Dmdata Settings with the File System

1. Access the `dmdata` folder under the `webroot`. Right click it and display its **Properties**.
2. On the **Security** tab, make sure the user defined in `AssetManagement.config` (the default is `EKT_Asset_User`) has at least write permissions. DMS uses the `EKT_Asset_User` to upload files to the server.
3. On the same tab, make sure the `ASPNET` user has full control. DMS uses this user to transfer files to the correct folder, and delete them from the `dmdata` folder after the transfer.

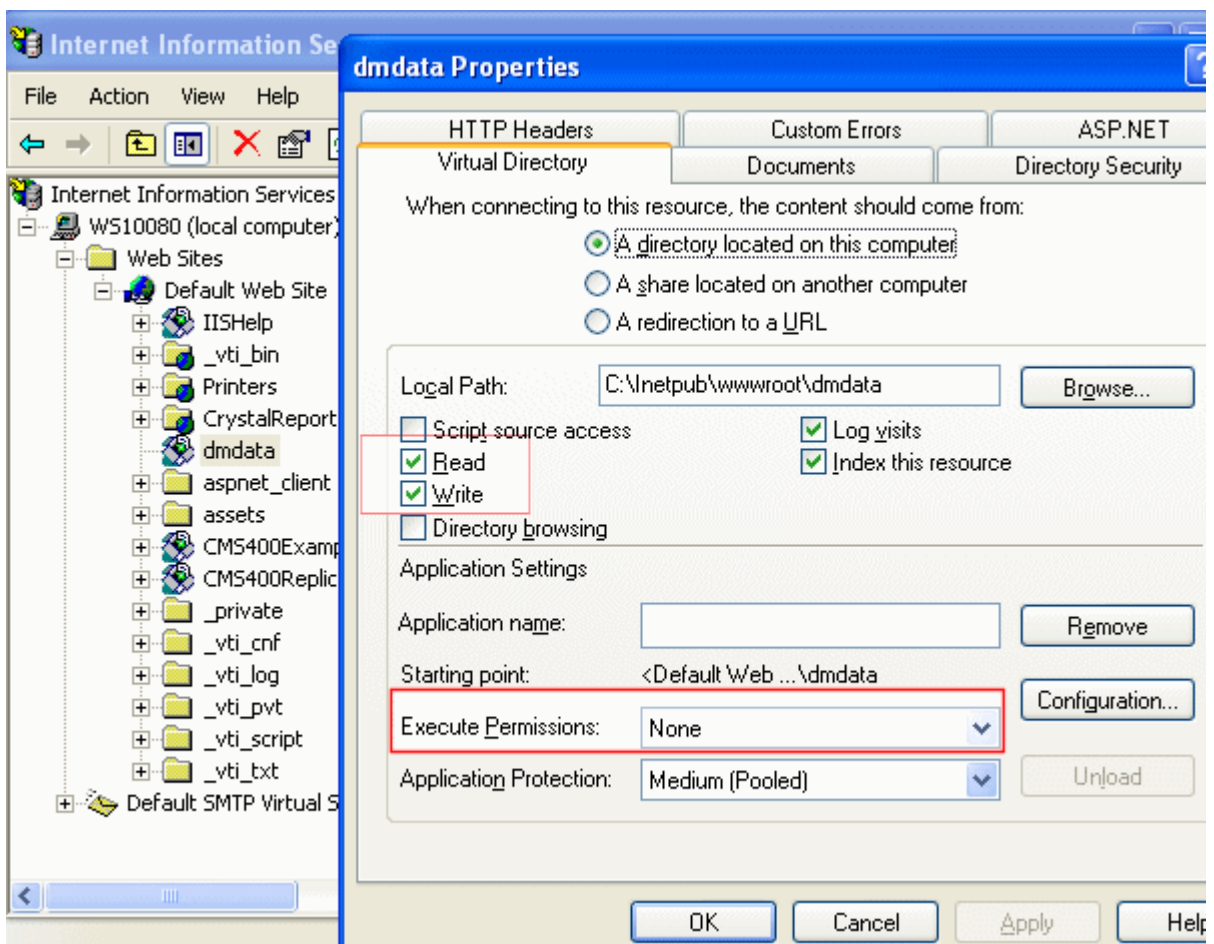


4. On the **Web Sharing** tab, make sure this folder is being shared, and that the correct site is selected from the dropdown menu. Click **Edit Properties**. On this screen, make sure **Read and Write** are checked, and that **Application Permissions** is set to **None**.

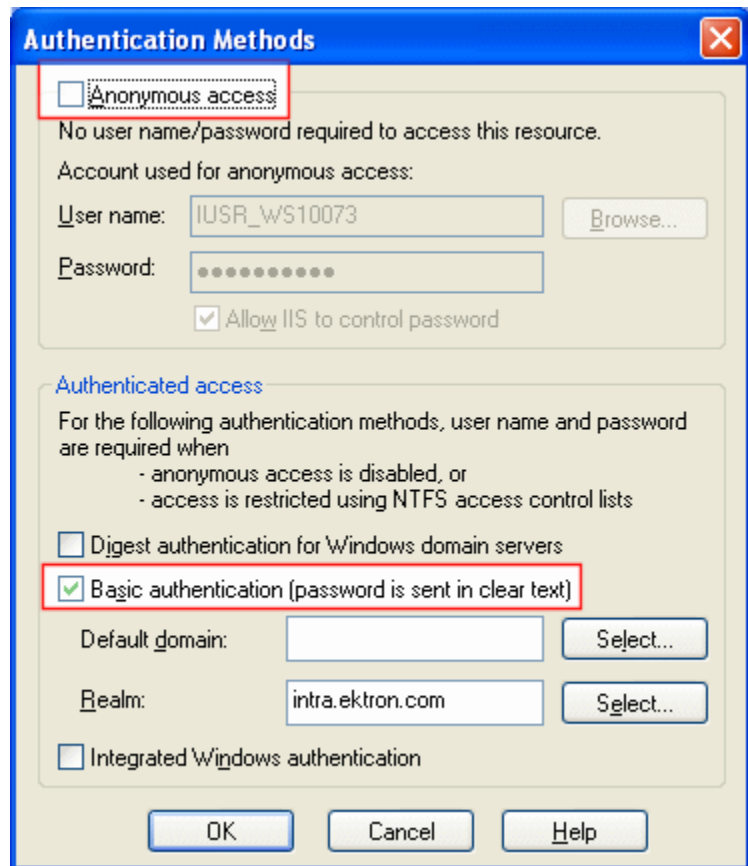


Dmdata Settings within IIS

1. Right click the `dmdata` folder and display its **Properties**.
2. On the **Virtual Directory** tab, make sure checkboxes for **read** and **write** are checked. Also, the **Execute Permissions** dropdown must be set to **None**.



3. On the **Directory Security** tab, click the **Edit** button for **Anonymous Access and Authentication Control**. Ensure that **Anonymous Access** for this folder is turned off, and that **Basic Authentication** is turned on.



PDF Generation

PDF (Portable Document Format) is a type of file developed as a means of distributing compact, platform-independent documents. Each document is self-contained, packing text, graphics, and fonts into a file.

Office documents stored in **Ektron CMS400.NET** can be automatically converted to PDF format. Then, when adding the Office document to a Web page, a visitor sees the PDF version of the document.

Why use PDF?

- Files easily cross multiple platforms, including Microsoft, Apple, Linux, and Unix.

- Documents keep their formatting and appear the same on a computer screen or when printing.
- File size is typically smaller, which means less bandwidth usage.
- Free viewing application that allows any Office documents, once converted, to be viewed by anyone with a PDF viewer.
- Eliminates the need for a different viewer for each file type.

The following sections explain creating PDFs with the Document Management functionality:

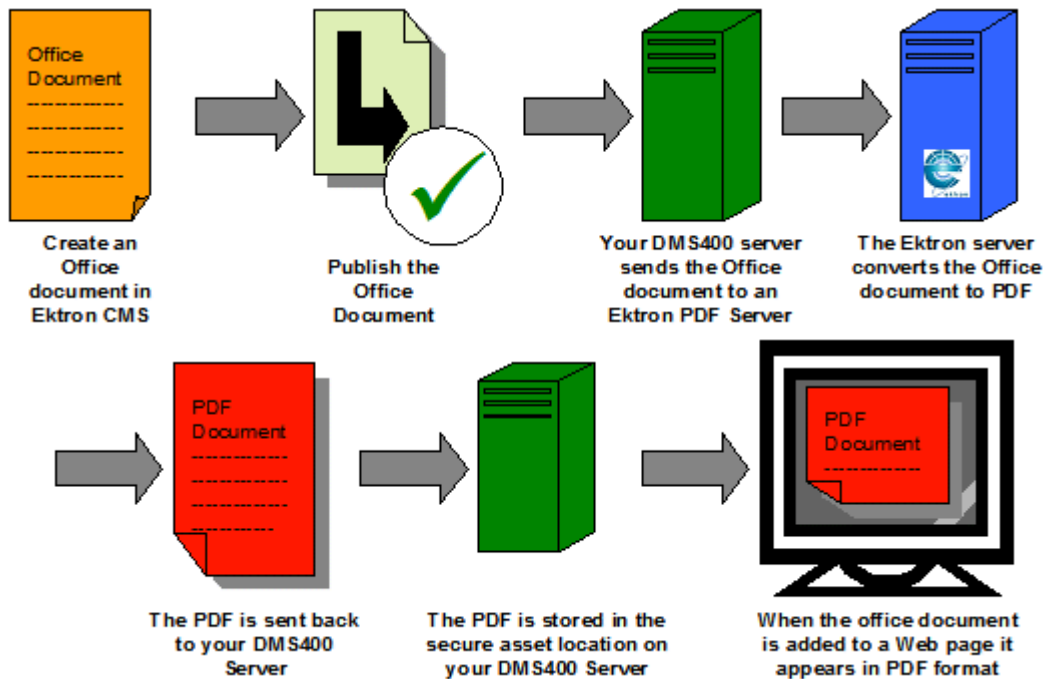
- ["PDF Conversion Process" on page 337](#)
- ["Local PDF Generation" on page 338](#)
- ["Enabling or Disabling PDF Generation" on page 348](#)
- ["Designating a Folder to Generate PDFs Automatically" on page 349](#)

PDF Conversion Process

The PDF conversion of an Office document starts when it is published. At that point, a copy of the file is sent to an Ektron server for PDF generation. After the server generates the PDF, it returns the PDF to your Asset Management server.

When the PDF returns, it doesn't appear in the CMS400.NET Workarea -- only the originally-published Office document appears. Document Management stores the PDF file in its secure location.

Subsequent editing is done in the original Office document, and each time it's published, a new PDF is generated.



Once the Office document is added to a Web page, the Web page shows the PDF version of the it. This means visitors of the site only need a PDF viewer installed to view any Office document on your site.

Local PDF Generation

If you purchase software from a PDF generation software vendor, you can create PDF documents on a local network. Reasons for generating a PDF locally include:

- Speed: Office documents take less time to be converted to PDF format
- Security: Office documents never leave the local network
- Quality: You can configure the output quality of the Office documents

Ektron has tested the following PDF generation systems with **Ektron DMS400**:

- OmniFormat by Software995
- ActivePDF Server by ActivePDF, Inc.

The following sections explain setting up local PDF generation.

- ["Setting Up a Local PDF Generator" on page 339](#)
- ["Modifying the <PdfGenerator> Tag Information" on page 347](#)

Setting Up a Local PDF Generator

This section describes setting up OmniFormat as a local PDF generator. It includes:

- Editing the AssetManagement.Config file
- Setting up the EktronPDFGenerator folder
- Editing the Web.Config file
- Installing the PDF generation software
- Starting the PDF generation service on your server

Follow these steps to set up a local PDF generator on your network.

1. Extract the zip file you received for PDF generation from Ektron, Inc. It creates two directories:
 - Pdf995
 - EktronPDFGenerator
2. Copy the **EktronPDFGenerator** folder to your webroot. For example, `c:\inetpub\wwwroot`.
3. Open the `web.config` file located in `\webroot\EktronPdfGenerator`.
4. Make sure the following keys exist between the `<appSettings>` tags
 - `<add key="DocumentsDirectory" value="C:\OfficeDocuments\" />`
 - `<add key="PdfDirectory" value="C:\omniformat\watch\" />`

- `<add key="OutputDirectory" value="C:\pdfoutput\" />`

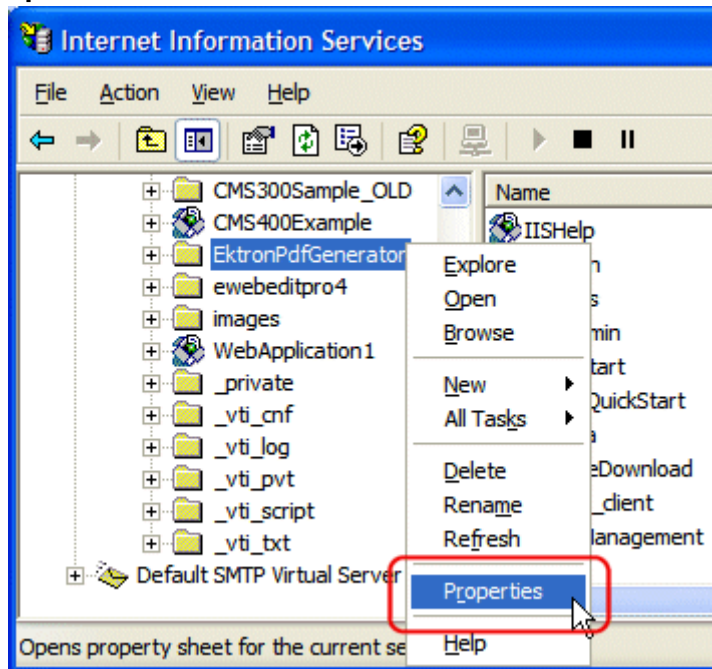
NOTE

These are the default key and value settings. If you change any folder locations during installation, change the corresponding values.

5. Navigate to the **Control Panel > Administrative Tools > Internet Information Services**.
6. Click **Web Sites > Default Web Site**.



7. Right click the **EktronPDFGenerator** folder and choose **Properties**.



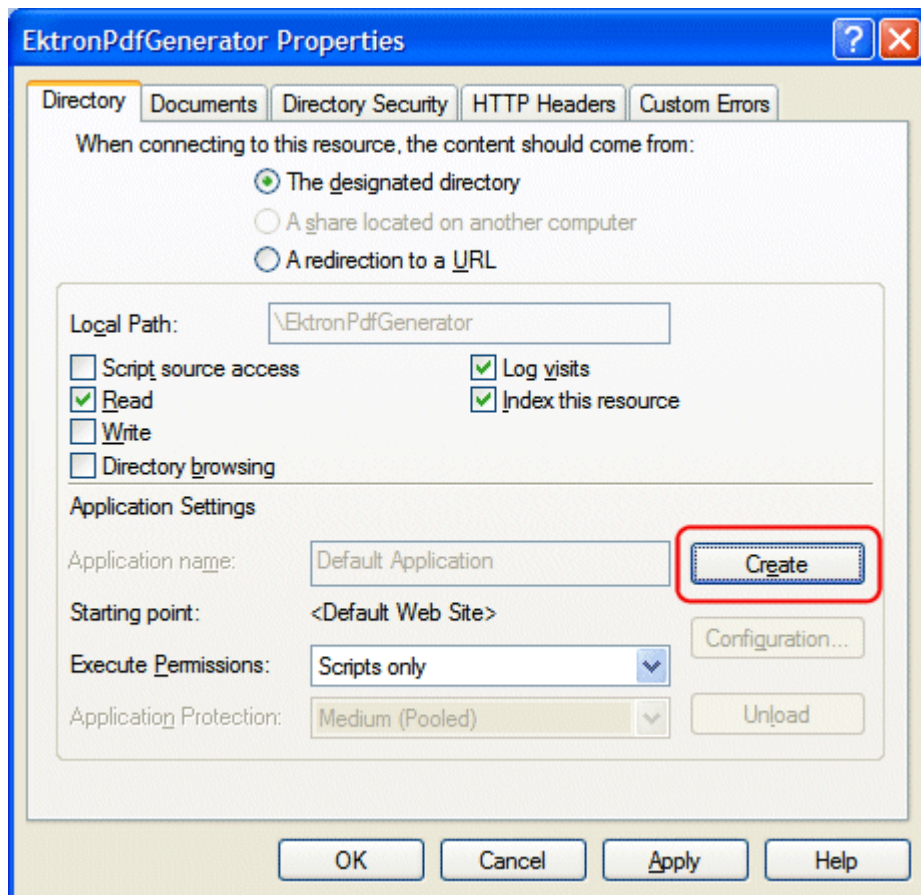
8. Click the **Directory Security** tab.
9. In the **Anonymous access and authentication control** area, click edit.

10. Verify that **Anonymous access** is checked.

- If it is checked, click **OK**. Do not change other settings in this dialog box.
- If it is unchecked, click the checkbox to add a check. Then click **OK**. Do not change other settings in this dialog box.

11. Click the **Directory** tab.

12. Click the **Create** button.



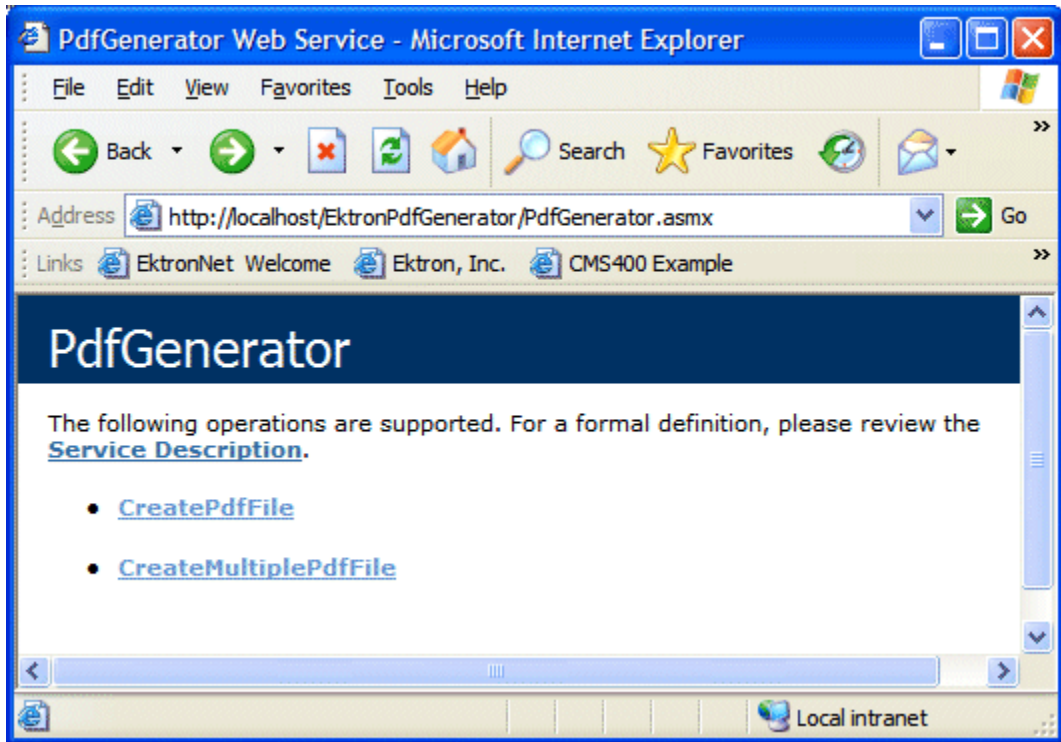
13. Click **OK**. Do not change other settings in this dialog box.

14. Open a Web browser.

15. In the **Address** field, insert the following line:

```
http://localhost/EktronPdfGenerator/PdfGenerator.aspx
```

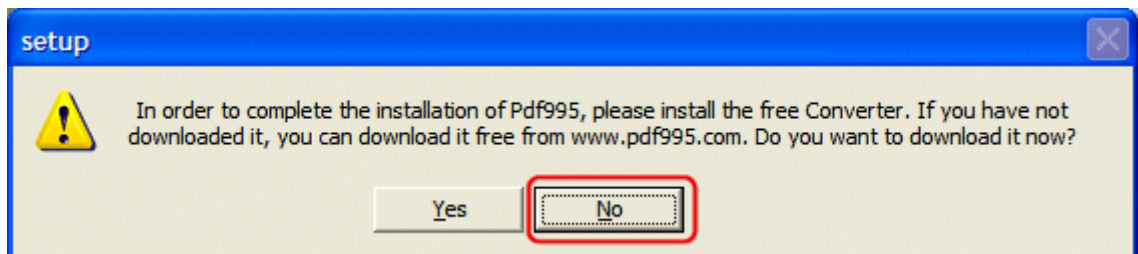
16. Verify the following page appears.



17. Navigate to the **pdf995** folder that was installed earlier.

18. Double click **pdf995s.exe**.

If the following dialog box appears, click **No**.



19. Run **ps2pdf995.exe**.

20. Click **Accept** on the PDF995 User Configuration Screen.

21. Run **omniformat.exe**.

22. Click **Accept** to accept the OmniFormat End User Agreement.

23. Run **ToolsetKey.exe**.

24. Enter your name in the **Name** field.

25. Enter your license key in the **Key Value** field.

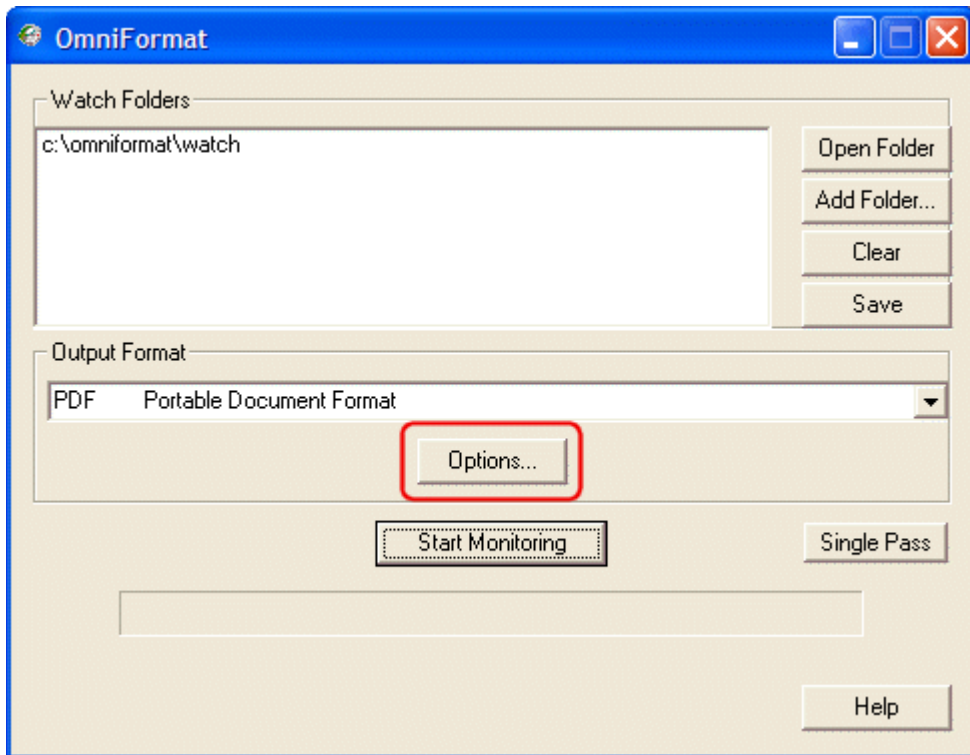
NOTE This license is separate from Ektron CMS400.NET. The license is provided to you when you purchase the PDF generation software.

26. Create a new directory under **C:** called **pdfoutput**.

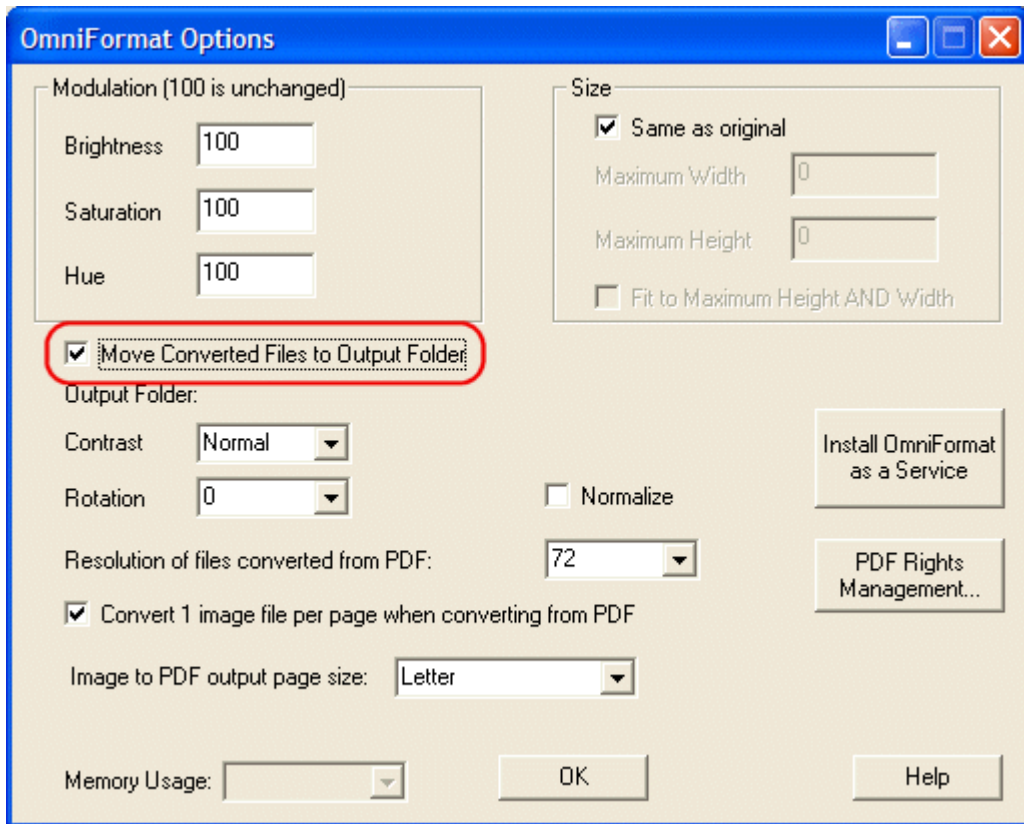
27. Navigate to **C:\omniformat**.

28. Double click **OmniFormat.exe**.

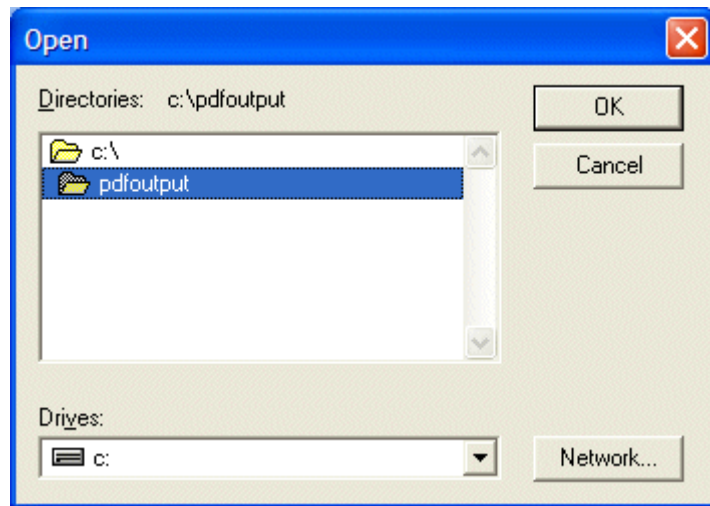
29. Click **Options**.



30. Check the **Move Converted Files to Output Folder** checkbox.

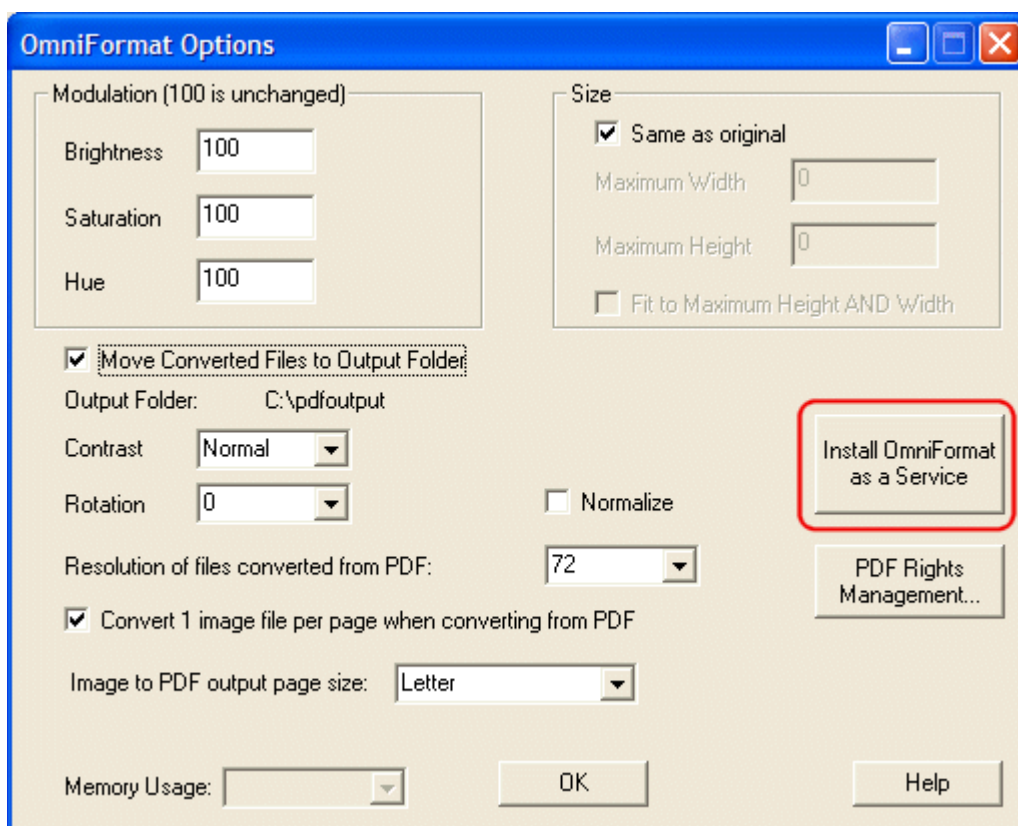


31. When the **Open** dialog box appears, select the **C:\pdfoutput** folder.

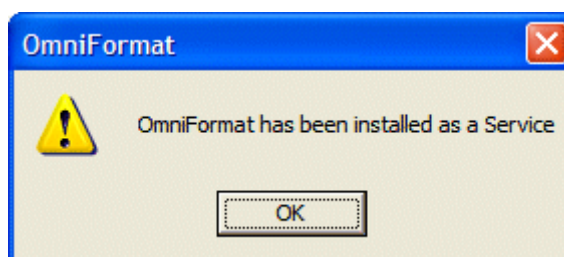


32. Click **OK**.

33. On the OmniFormat Options dialog box, click **Install OmniFormat as a Service**.

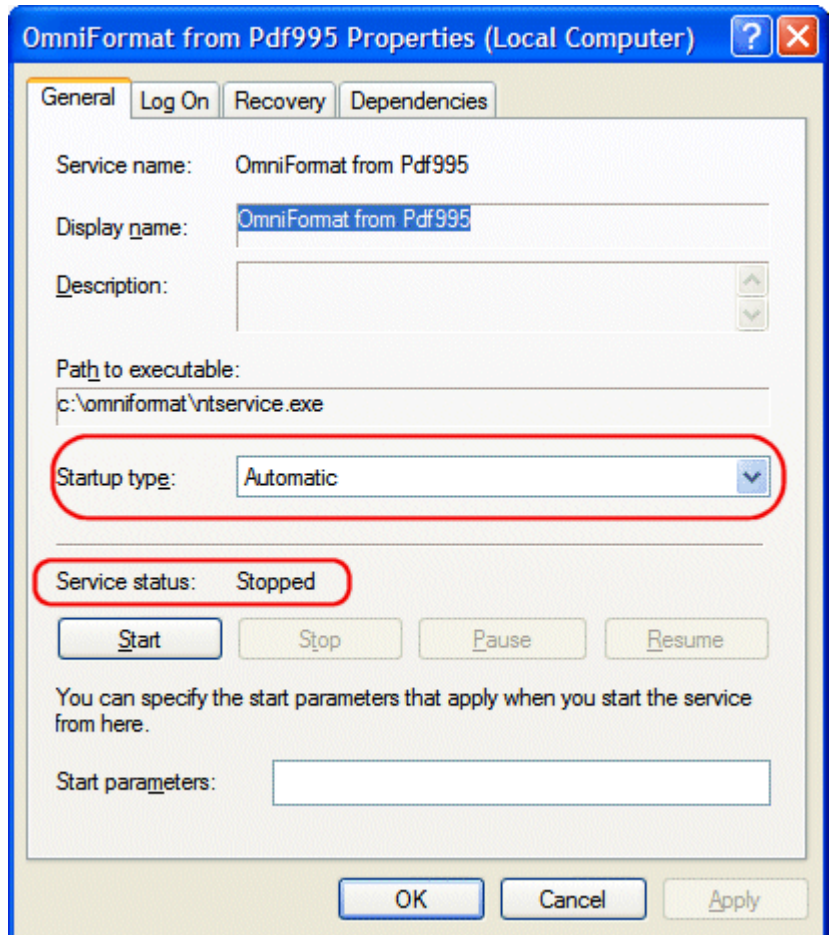


34. If the installation is successful, the following dialog box appears. Click **OK**.

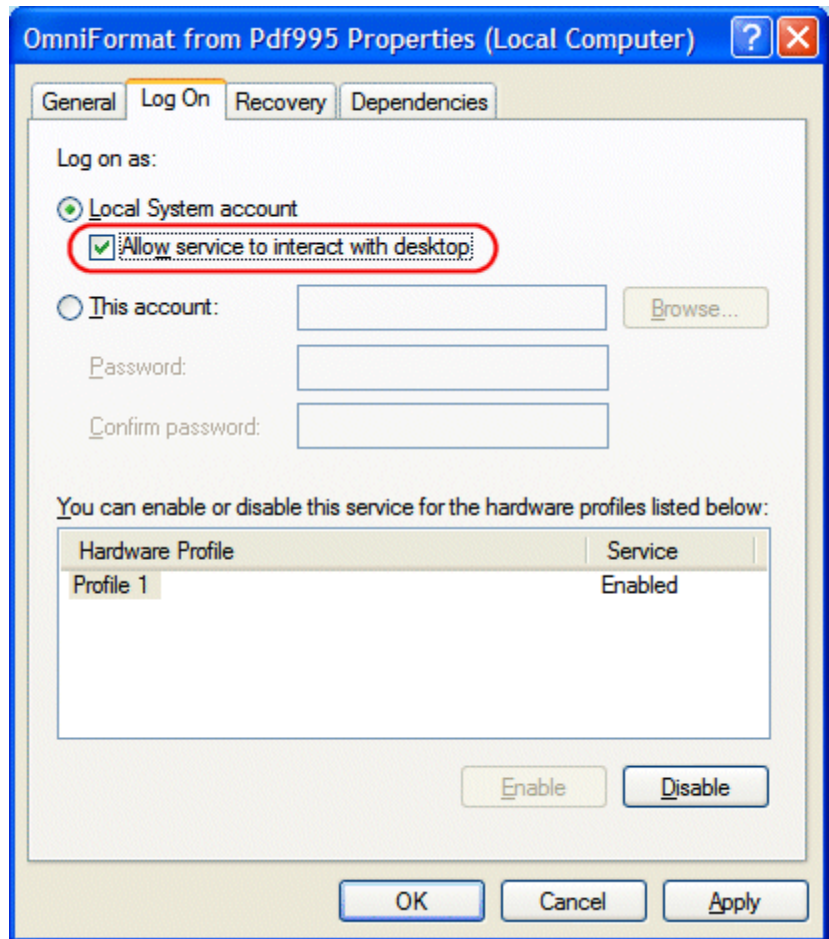


35. Click **OK** to close the **Options** box.
36. Exit OmniFormat.
37. Navigate to **Control Panel > Administrative Tools > Services**.
38. Right click the **OmniFormat from Pdf995** service and choose **Properties**.

39. On the **General** tab, make sure the **Startup type** is **Automatic** and that the **Service status** is **not disabled**. (Do not click **Start** now.)



40. On the **Log On** tab, check the **Allow Service to interact with desktop** checkbox.



41. Return to the **General** tab and click **Start** service.
42. Click **OK**.
43. Drag and drop a test word file on the **C:\omniformat\watch** folder. A PDF file appears in **C:\pdfoutput**.

NOTE This might take a few minutes depending on the document's size and the system's speed.

Modifying the <PdfGenerator> Tag Information

To provide Document Management with the location of the local PDF generator, modify the `<PdfGenerator>` tag in the `AssetManagement.Config` file.

To modify the file, follow these steps.

1. Open the `AssetManagement.Config` file located in `C:\Inetpub\wwwroot\AssetManagement.`
2. Change the information located between the `<PdfGenerator>` tags to the location of the local PDF generator.

For example:

`<PdfGenerator>http://pdfgenerator.ektron.com/PdfManager/PdfGenerator.aspx</PdfGenerator>`
might become


`<PdfGenerator>http://localhost/EktronPdfGenerator/PdfGenerator.aspx</PdfGenerator>`

3. **Save and Close** the file.

Enabling or Disabling PDF Generation

Administrators decide if this feature is enabled and to which folders it applies. After enabling this feature, administrators can change any folder's properties to allow PDF generation.

The following steps explain how to enable or disable this feature.

1. In the CMS Workarea, click **Settings > Configuration > Setup**.
2. Click the **Edit Properties** button (.
3. Click the **Enable Office documents to be published as PDF** checkbox.





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

Designating a Folder to Generate PDFs Automatically

By setting a folder's properties to allow PDF generation, all Office documents published in that folder have a PDF created for them. For an introduction to PDF generation, see ["PDF Generation" on page 336](#).

The steps below explain how to change the folder property for PDF generation.

NOTE Existing subfolders do not inherit PDF generation. Each subfolder needs to be set individually. However, when creating a new subfolder, it inherits the PDF generation setting from the parent folder. Administrators can change the setting while creating a new subfolder.

1. In the Workarea, click the **Content folder button**.
2. Click the folder for which you want to enable PDF generation.
3. Click the **View Properties** button (.
4. Click the **Edit Properties** button (.
5. Click the **Publish Office Documents as PDF** checkbox.

<p>Should Office documents added to this folder be published as PDF?</p> <p><input checked="" type="checkbox"/> Publish Office documents as PDF</p>
--

6. Click the **Save** button (.

Troubleshooting

This section explains how to fix problems that may occur with **Ektron DMS400**.

Symptom	See this section
Error message: Install Indexing Service	"Setting Up the Indexing Service" on page 350
A search of PDF files on Ektron CMS returns no results	"Installing the Acrobat PDF iFilter" on page 359

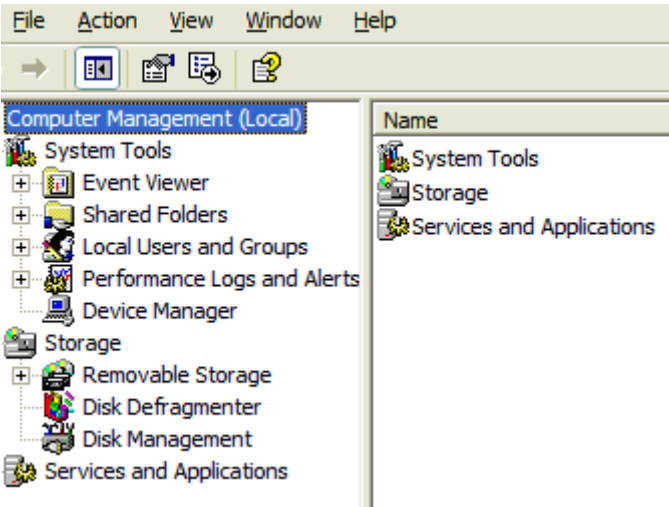

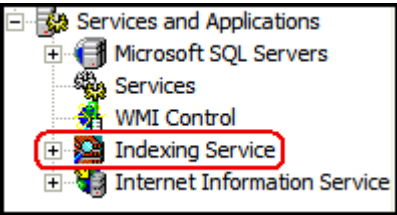
Symptom	See this section
A search of asset files finds no assets on your Web site	"Turning on the Asset Indexing Service" on page 363
The server running Ektron DMS400 is running slowly; much of its resources are being used even though the computer is idle	"Disabling the System Indexing Service" on page 360
Error message: Windows Server 2003 no longer ships MSDAIPP.DLL, thus connecting to an FPSE server through Webfolders, is no longer possible.	"Using Microsoft Windows Server 2003 as a Client (Web Folders Setup)" on page 364
While trying to drag and drop an asset, an error message appears: The target directory already exists.	Check the <code>impersonate</code> element of the <code>web.config</code> file. If it is set to <code>true</code> , make sure the anonymous access account has at least write access to the <code>dmdata</code> and <code>assets</code> directories.

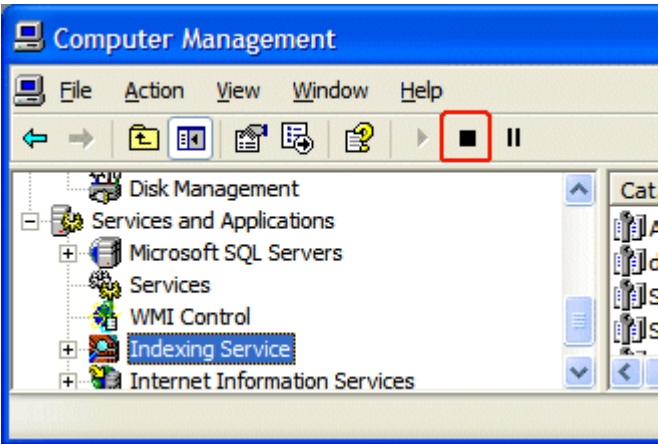
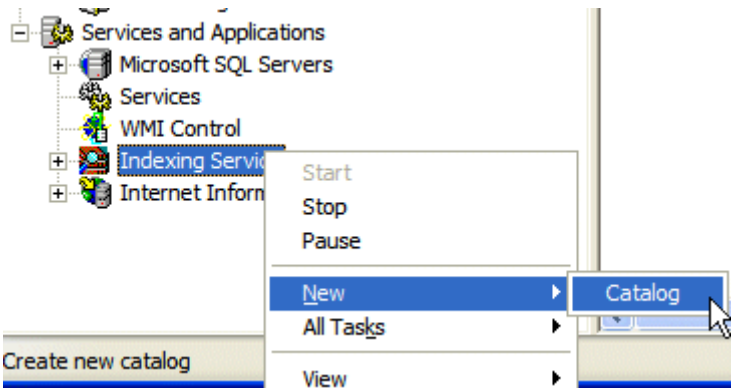
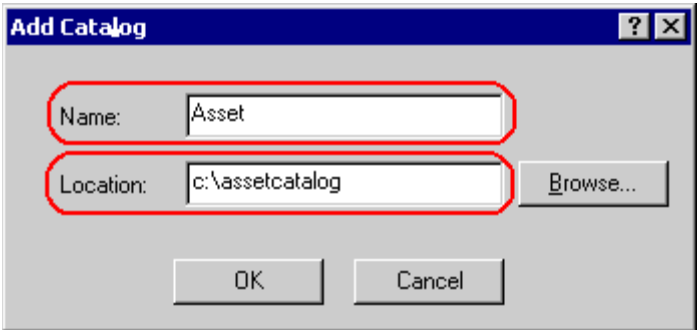
Setting Up the Indexing Service

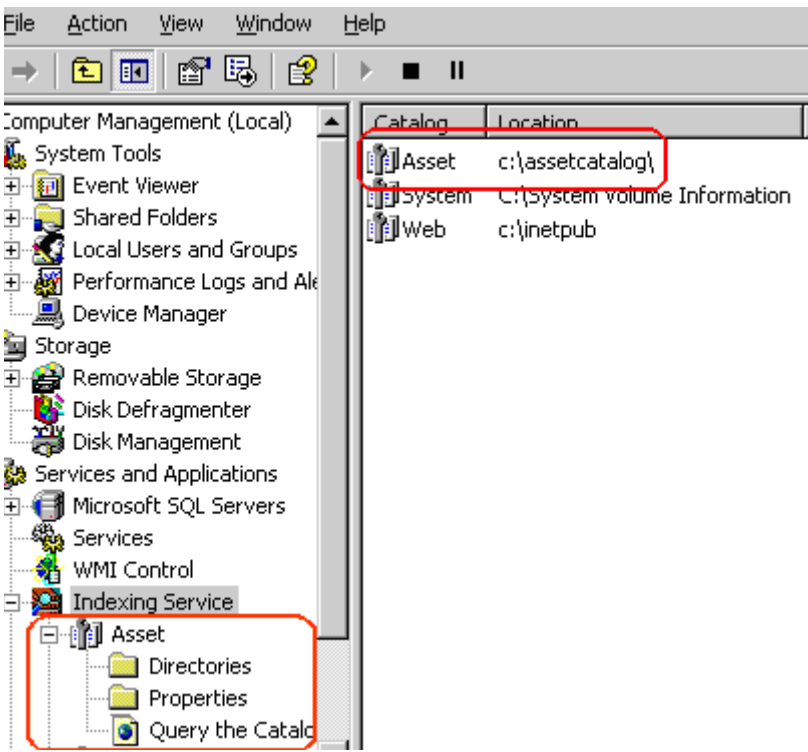
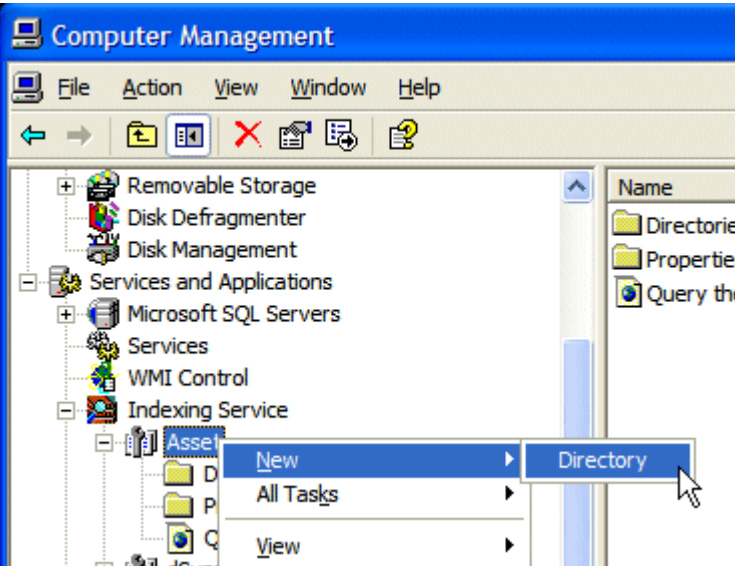
If you see the following error during installation, you need to set up the indexing service manually.

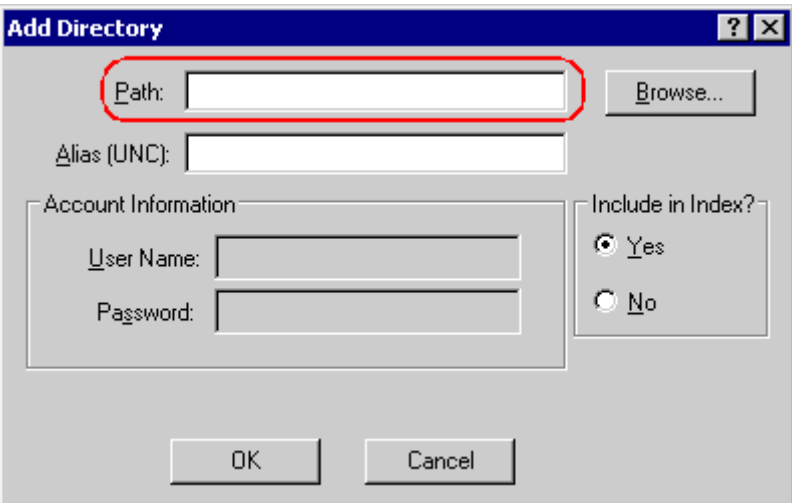
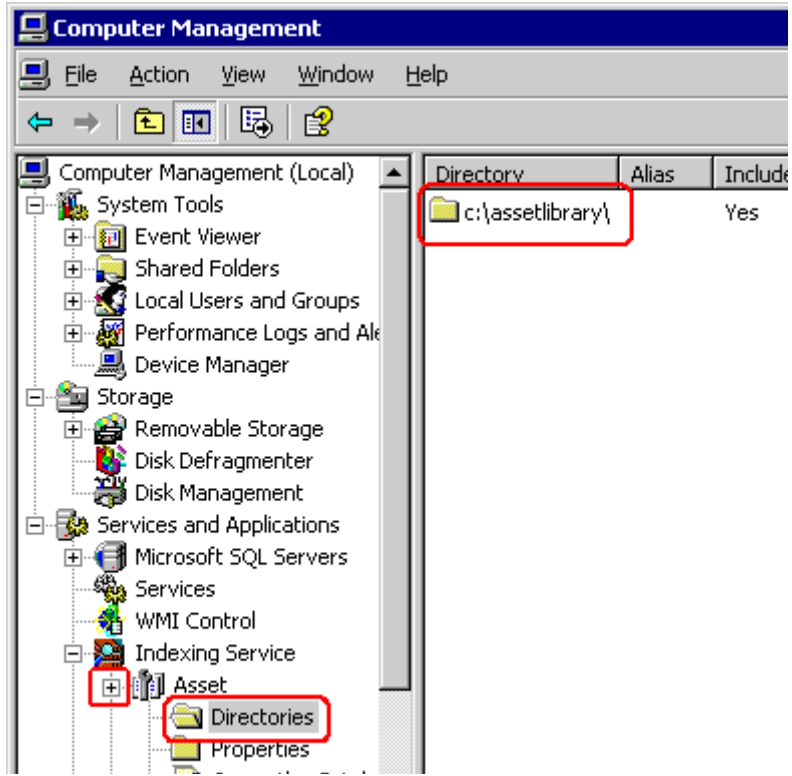


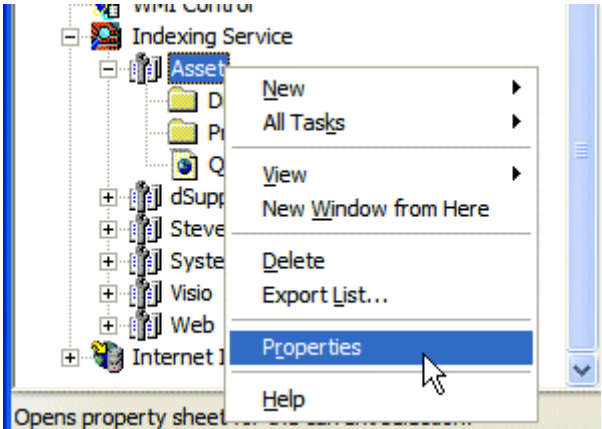
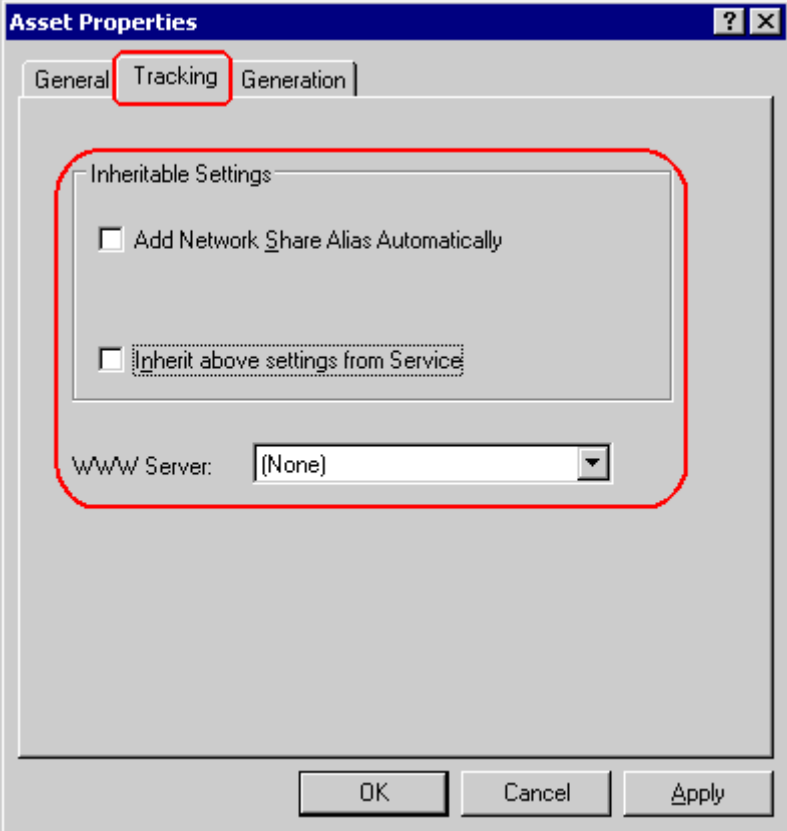
The following steps explain how to do that.

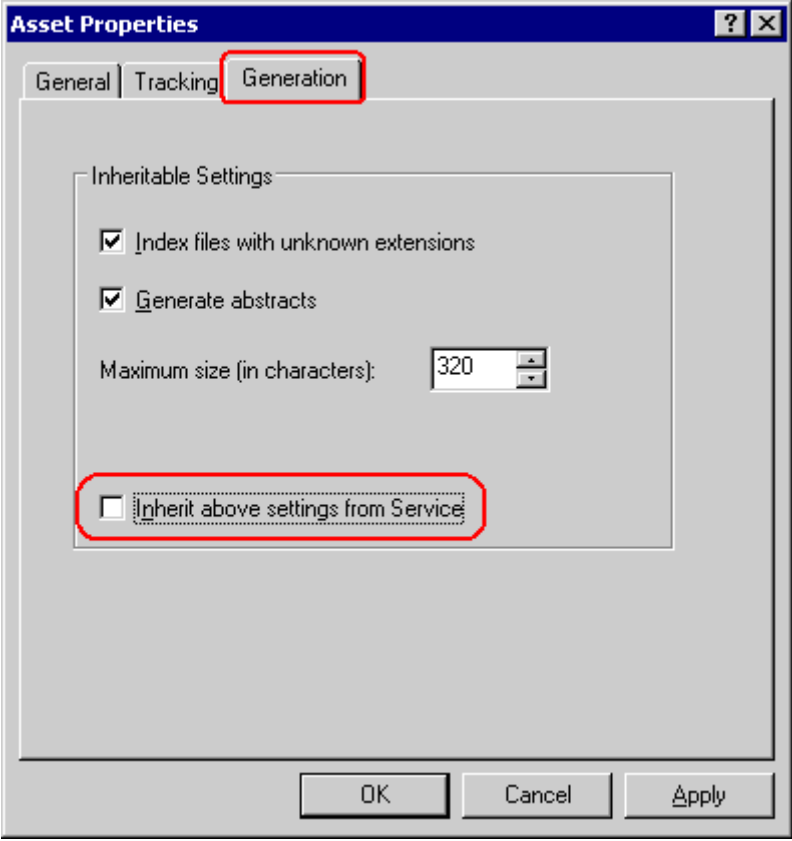
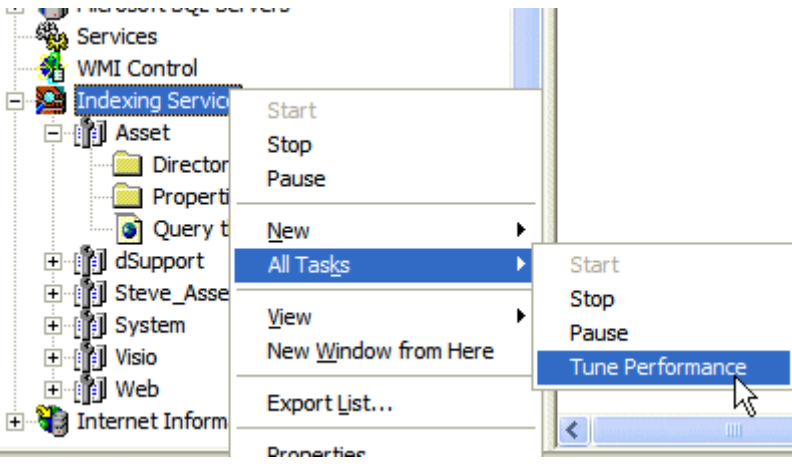
Step	Screen
<p>1. Click Start > Control Panel > Administrative Tools > Computer Management.</p> <p>The Computer Management screen appears.</p>	
<p>2. Click the plus sign (+) next to Services and Applications.</p>	
<p>3. Click Indexing Service.</p>	

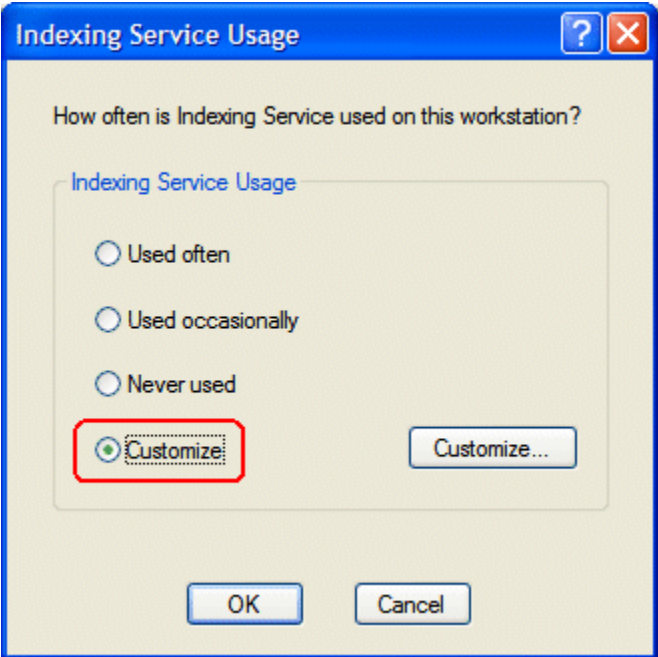
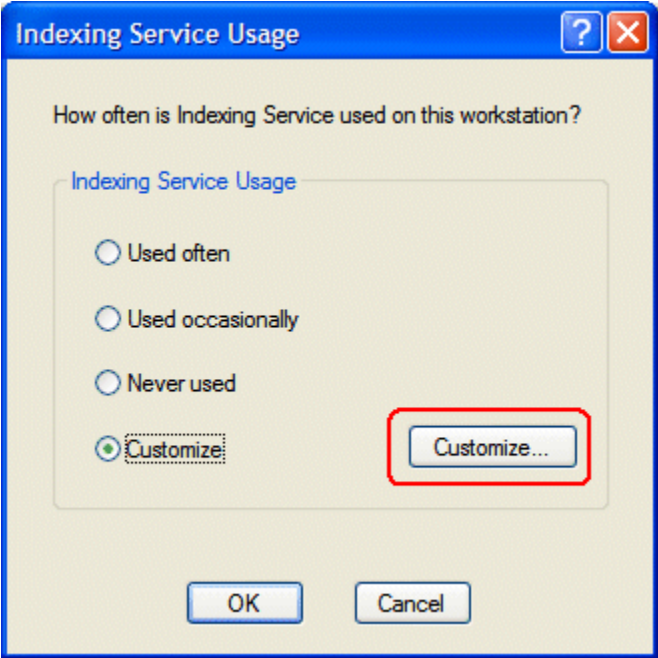
Step	Screen
<p>4. Click the stop button to halt the indexing service if it is running.</p> <p><u>Note: If the Index service is running, the start button ► is grayed out.</u></p>	
<p>5. Right click Indexing Service, then click New > Catalog.</p>	
<p>6. At the Add Catalog Screen:</p> <ul style="list-style-type: none"> • In the Name field, add the catalog name. • In the Location field, identify the folder that will store the asset catalog. <p><u>Note: By default, during installation, Ektron DMS400 names the catalog Asset and associates it with the location c:\assetcatalog. The installer can change the default location.</u></p>	

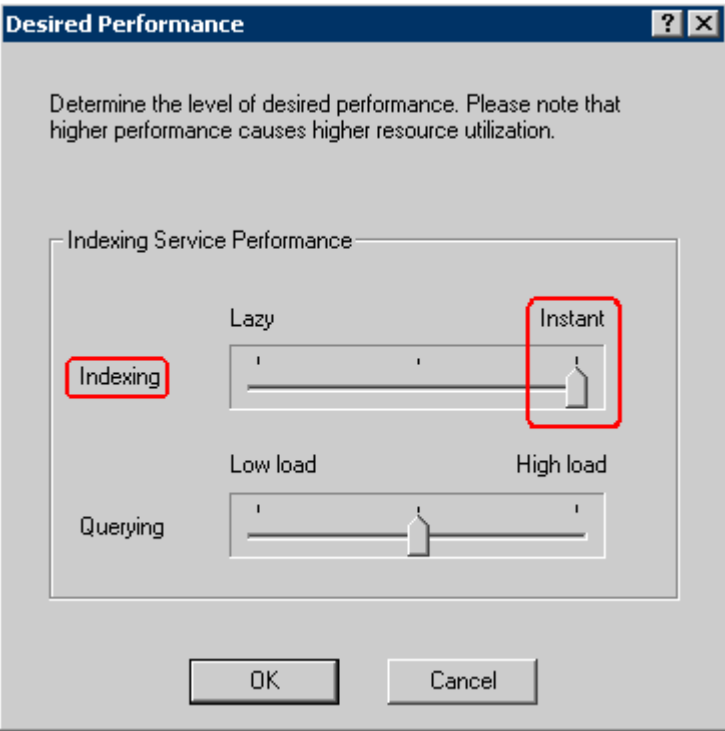
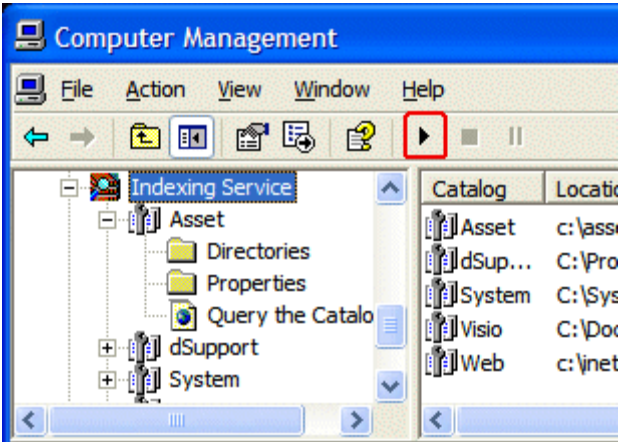
Step	Screen								
<p>7. Click OK.</p> <p>The Computer Management screen shows your new Indexing Service.</p>	 <p>The screenshot shows the Computer Management (Local) console. In the left-hand tree, the 'Indexing Service' is expanded, and its 'Asset' sub-item is selected. In the right-hand pane, a table lists the catalogs and their locations:</p> <table border="1"> <thead> <tr> <th>Catalog</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>Asset</td> <td>c:\assetcatalog\</td> </tr> <tr> <td>System</td> <td>C:\system volume information</td> </tr> <tr> <td>Web</td> <td>c:\inetpub</td> </tr> </tbody> </table>	Catalog	Location	Asset	c:\assetcatalog\	System	C:\system volume information	Web	c:\inetpub
Catalog	Location								
Asset	c:\assetcatalog\								
System	C:\system volume information								
Web	c:\inetpub								
<p>8. Right click the Asset catalog, then click New > Directory.</p> <p>This is the directory the service indexes.</p>	 <p>The screenshot shows the Computer Management console with the 'Indexing Service' expanded. The 'Asset' catalog is right-clicked, and a context menu is displayed. The 'New' option is selected, and a sub-menu is shown with 'Directory' highlighted by the mouse cursor.</p>								

Step	Screen
<p>9. In the Path text box, add the folder of the secure storage location. Make sure the Include in Index radio button is marked Yes.</p> <p><u>Note:</u> By default, during installation, Ektron DMS400 uses <code>c:\(Domain Name, IP Address or Machine Name)\assetlibrary</code>.</p>	
<p>10. Click OK. Then, click the plus sign (+) next to Asset to view the Directories folder.</p> <p>In the Directories folder, the new directory is displayed.</p>	

Step	Screen
11. Right click Assets , then click Properties .	 <p>Opens property sheet</p>
12. On the Tracking tab, uncheck all boxes and choose None for WWW Server .	

Step	Screen
<p>13. On the Generation tab, uncheck Inherit above settings from Service. Then click OK.</p> <p>The Index files with unknown extensions and Generate abstracts check boxes can be checked or empty. It is your choice.</p>	 <p>The screenshot shows the 'Asset Properties' dialog box with the 'Generation' tab selected. The 'Inheritable Settings' section contains three options: 'Index files with unknown extensions' (checked), 'Generate abstracts' (checked), and 'Maximum size (in characters):' (320). The 'Inherit above settings from Service' checkbox is unchecked and highlighted with a red rectangle. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.</p>
<p>14. Right click Indexing Service, then click All Tasks > Tune Performance.</p>	 <p>The screenshot shows the Windows Services console with the 'Indexing Service' selected. A right-click context menu is open, showing options like 'Start', 'Stop', 'Pause', 'New', 'View', 'New Window from Here', 'Export List...', and 'Properties'. The 'All Tasks' option is expanded, and the 'Tune Performance' option is highlighted with a mouse cursor.</p>

Step	Screen
15. Click the Customize radio button.	 The screenshot shows the 'Indexing Service Usage' dialog box. It has a title bar with a question mark and a close button. The main text asks 'How often is Indexing Service used on this workstation?'. Below this is a group box labeled 'Indexing Service Usage' containing three radio buttons: 'Used often', 'Used occasionally', and 'Never used'. The 'Customize' radio button is selected and highlighted with a red rectangle. To the right of the radio buttons is a 'Customize...' button. At the bottom are 'OK' and 'Cancel' buttons.
16. Click the Customize button.	 The screenshot shows the 'Indexing Service Usage' dialog box. It has a title bar with a question mark and a close button. The main text asks 'How often is Indexing Service used on this workstation?'. Below this is a group box labeled 'Indexing Service Usage' containing three radio buttons: 'Used often', 'Used occasionally', and 'Never used'. The 'Customize' radio button is selected. To the right of the radio buttons is a 'Customize...' button, which is highlighted with a red rectangle. At the bottom are 'OK' and 'Cancel' buttons.

Step	Screen
17. Change Indexing to Instant .	 <p>The 'Desired Performance' dialog box is shown. It contains two sliders: 'Indexing' and 'Querying'. The 'Indexing' slider has 'Lazy' and 'Instant' radio buttons. The 'Instant' radio button is selected and highlighted with a red box. The 'Querying' slider has 'Low load' and 'High load' radio buttons. The 'OK' and 'Cancel' buttons are at the bottom.</p>
18. Click OK and OK again to close both dialog boxes.	
19. Click the Start button to start the service again.	 <p>The 'Computer Management' console is shown. The 'Indexing Service' is selected in the left pane. The 'Start' button (a green play icon) is highlighted with a red box in the right pane.</p>

Installing the Acrobat PDF iFilter

This section describes how to install the Acrobat PDF iFilter. PDF iFilter is a free downloadable application which lets you index PDF documents with Microsoft® indexing clients, so that users can easily search for text within PDF documents.

Symptom

While trying to search Adobe Acrobat PDFs on Ektron CMS, your search returns no results.

Cause

The Acrobat PDF iFilter is either not installed, or is installed incorrectly on your server.

Resolution

Follow these steps to make sure that the Adobe PDF iFilter is installed correctly.

Step	Screen
1. Ensure your server meets one of the following requirements.	<ul style="list-style-type: none">• Microsoft Windows 2000 Professional, Service Pack 2• Microsoft Windows XP Professional, Service Pack 1• Microsoft Windows 2000 Server, Service Pack 3• Microsoft Windows 2003 Server Each environment must contain Microsoft Indexing Services.
2. Download the PDF iFilter from http://www.adobe.com/support/downloads/detail.jsp?ftpID=2611 to the machine where you wish to install it.	

Step	Screen
3. Stop all appropriate clients, using one or more of the following methods.	<ul style="list-style-type: none"> Windows XP and 2003 Server: Click Start > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Stop. Close window. Windows 2000 and 2000 Server: Click Start > Settings > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Stop. Close window.
4. Uninstall any previous version of PDF iFilter.	
5. Double-click the downloaded PDF iFilter 6.0 EXE file and follow the on-screen instructions.	
6. Start all appropriate clients, using one or more of the following methods.	<ul style="list-style-type: none"> Windows XP and 2003 Server: Click Start > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Start. Close window. Windows 2000 and 2000 Server: Click Start > Settings > Control Panel > Administrative Tools > Computer Management. In left-side Console Tree, highlight Indexing Service under Services and Applications. Under Action Menu, choose Start. Close window.
7. Re-index your system with the appropriate clients, using the following method.	<ul style="list-style-type: none"> Windows 2000/2000 Server/XP/2003 Server: Open the Computer Management Console (mentioned above). In the left-side Console Tree, open Services and Applications > Indexing Service. Open the Asset Catalog listed under Indexing Service by clicking on the plus sign (+) next to the Catalog name. Click on Directories. For each directory listed in the right pane that contains PDF files, right-click on it and select All Tasks > Rescan (Full).

For more information about troubleshooting and known issues with the Adobe Acrobat PDF iFilter, see the readme.htm file. The file's default location is C:\Program Files\Adobe\PDF iFilter 6.0\readme.htm.

Disabling the System Indexing Service

Symptom

The server running **Ektron DMS400** is running slowly; much of its resources are being used even when the computer is idle.

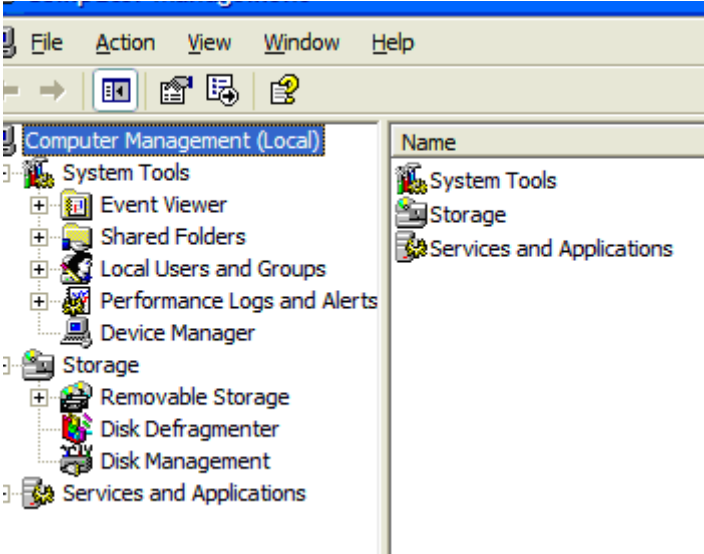
Cause

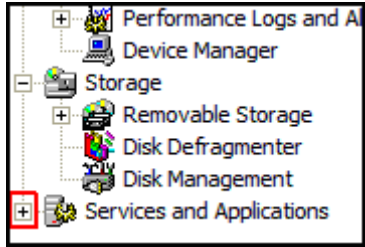
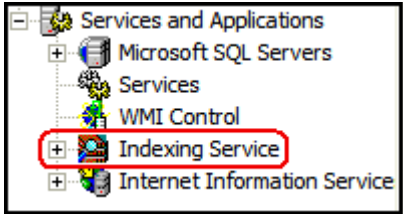
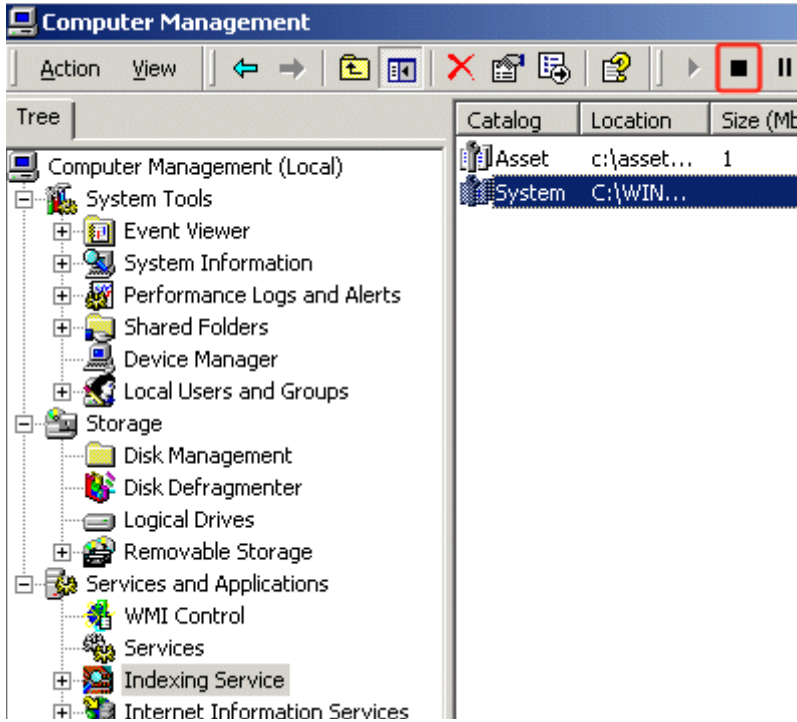
The Microsoft Windows Indexing service is turned on during installation. This service indexes every file on the server, and the resources required to carry out that task slow down other activities.

NOTE Ektron recommends turning off *all* indexing services other than the DMS Asset indexing service.

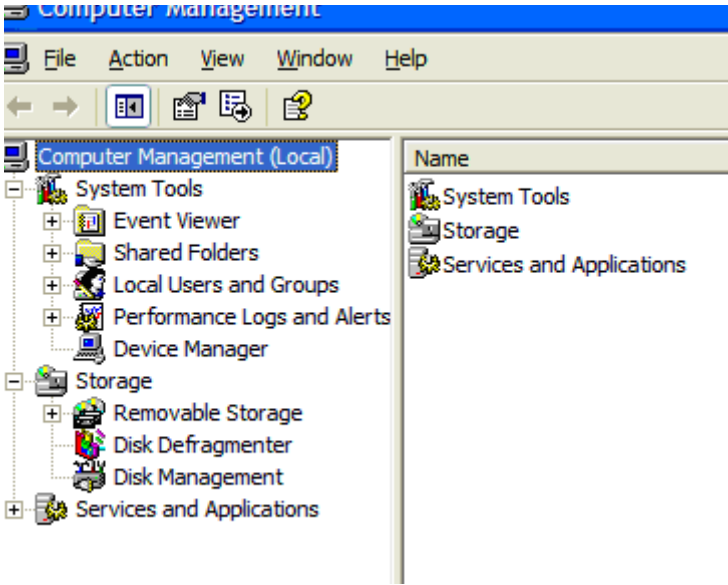

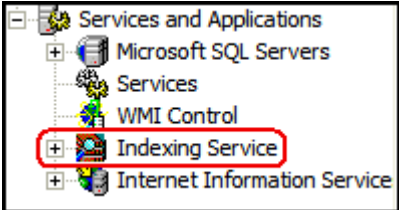
Resolution

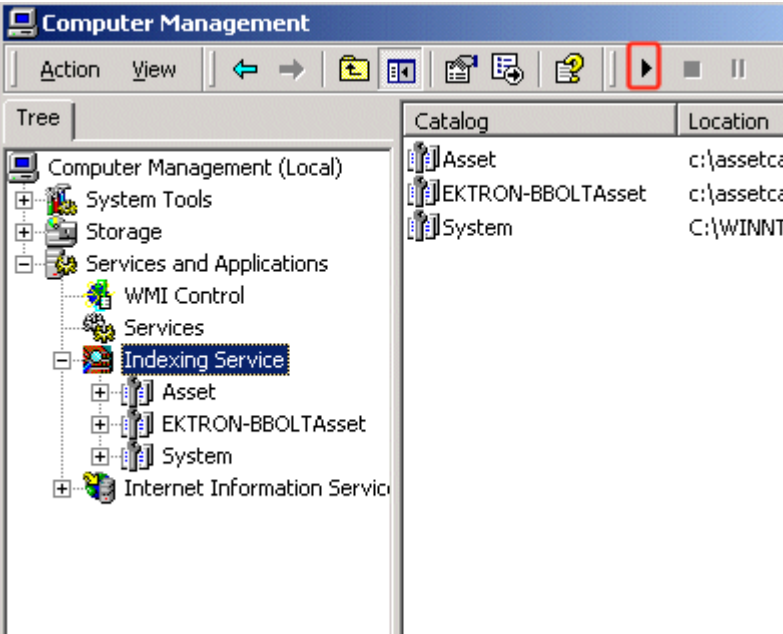
To resolve the issue, follow these steps to disable the Windows indexing service. This change does not affect DMS’s ability to find files because it uses a different indexing service.

Step	Screen
<div>1. Click Start > Control Panel > Administrative Tools > Computer Management. The Computer Management screen appears.</div>	

Step	Screen
2. Click the plus sign (+) next to Services and Applications .	
3. Click Indexing Service .	
4. Click the Stop button to stop the indexing service.	

Turning on the Asset Indexing Service

Step	Screen
<p>1. Click Start > Control Panel > Administrative Tools > Computer Management. The Computer Management screen appears.</p>	
<p>2. Click the plus sign (+) next to Services and Applications.</p>	
<p>3. Click Indexing Service.</p>	

Step	Screen
4. Click the Start button to start the indexing service.	

Using Microsoft Windows Server 2003 as a Client (Web Folders Setup)

Symptom

You receive the following error message:

- Windows Server 2003 no longer ships MSDAIPP.DLL, thus connecting to an FPSE server through Webfolders, is no longer possible.

Resolution

Per MS Licensing, you can obtain webfldrs.msi from any down-level OS, or any Office product that shipped before Windows2003

(not Office 2003) and install the WebFolders client. Doing so will keep you compliant with licensing.


Installing WebFolders from Office 2003 is only allowed if you have an Office 2003 license for each Windows2003 server you plan to install WebFolders on.

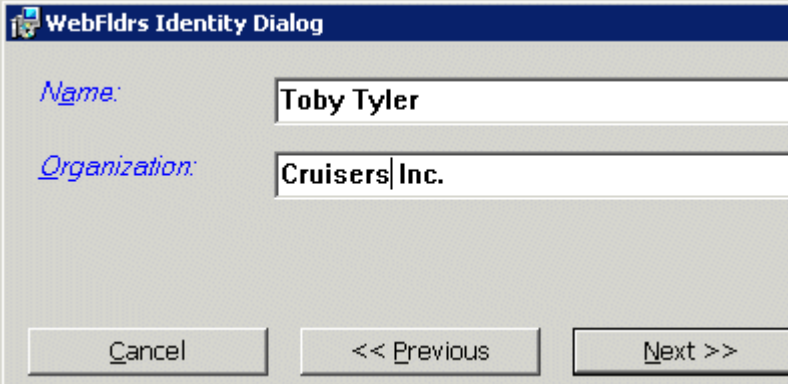
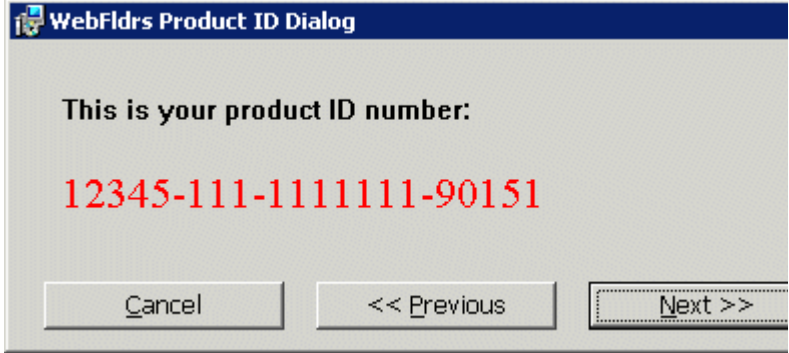
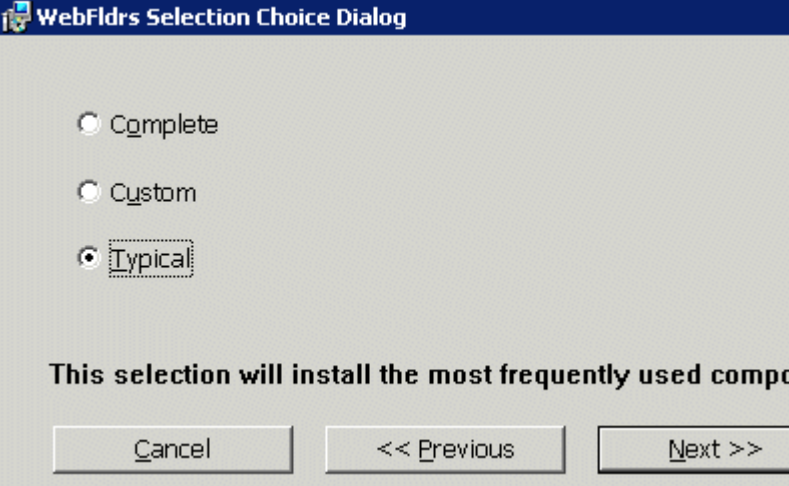
Web Folders Setup for Microsoft Windows Server 2003

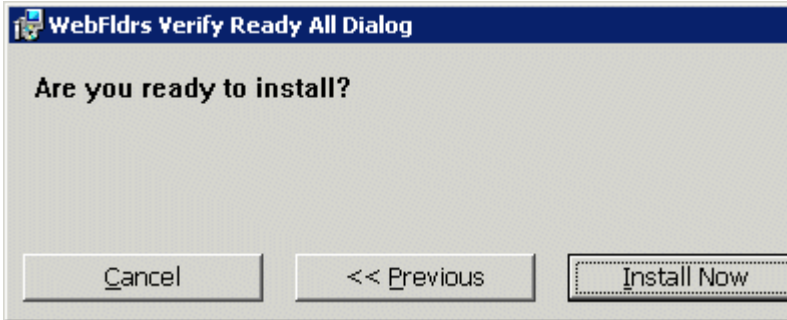
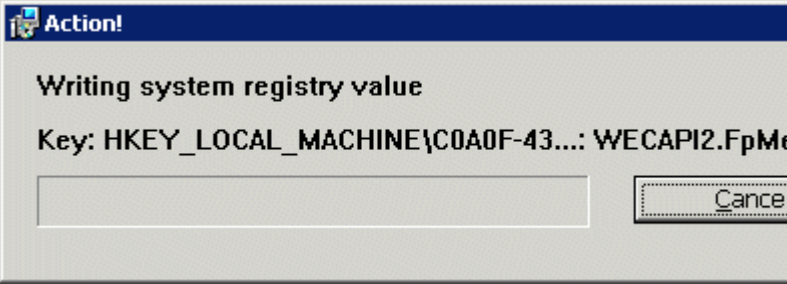
NOTE You only need to run the Web Folders Setup if there is a problem during the install. The **Ektron DMS400** install performs the setup when needed.

The MSDAIPP.DLL is no longer shipped with Microsoft Windows Server 2003, making communication with Web folders impossible. To correct this, **Ektron DMS400** setup runs the Web folder setup when it detects Microsoft Windows Server 2003.

The following steps explain installing Web Folders. You will need to obtain a copy of the webfldrs.msi file.

Step	Setup Screen
1. Double click the webfldrs.msi file.	
2. The Web Folders install screen appears. Click Next to continue.	 <p>The image shows a Windows-style dialog box titled "WebFldrs Welcome Dialog". The main text inside says "Welcome to WebFldrs." Below this text is a horizontal line. At the bottom of the dialog, there are three buttons: "Cancel", "<< Previous", and "Next >>". The "Next >>" button is highlighted with a dashed border, indicating it is the recommended action.</p>

Step	Setup Screen
<p>3. The Web Folders Identity dialog box appears.</p> <ul style="list-style-type: none"> • Add your Name. • Add your Organization. • Click Next. 	 <p>The WebFldrs Identity Dialog box is shown. It has a title bar with a folder icon and the text 'WebFldrs Identity Dialog'. Inside, there are two text input fields. The first is labeled 'Name:' in blue italicized text, and the second is labeled 'Organization:' in blue italicized text. The 'Name' field contains the text 'Toby Tyler' and the 'Organization' field contains 'Cruisers Inc.'. At the bottom, there are three buttons: 'Cancel', '<< Previous', and 'Next >>'.</p>
<p>4. The Web Folders Product ID dialog box appears. This dialog box displays the your product ID number.</p> <ul style="list-style-type: none"> • Click Next. 	 <p>The WebFldrs Product ID Dialog box is shown. It has a title bar with a folder icon and the text 'WebFldrs Product ID Dialog'. The main area contains the text 'This is your product ID number:' followed by the product ID number '12345-111-1111111-90151' in red. At the bottom, there are three buttons: 'Cancel', '<< Previous', and 'Next >>'.</p>
<p>5. The Web Folders Selection Choice dialog box appears.</p> <ul style="list-style-type: none"> • Complete - installs all components. • Custom - you choose the components to install. • Typical - installs the most frequently used components. <p>After making a selection, click Next.</p>	 <p>The WebFldrs Selection Choice Dialog box is shown. It has a title bar with a folder icon and the text 'WebFldrs Selection Choice Dialog'. Inside, there are three radio button options: 'Complete', 'Custom', and 'Typical'. The 'Typical' option is selected. Below the options, there is a text line that reads 'This selection will install the most frequently used compo'. At the bottom, there are three buttons: 'Cancel', '<< Previous', and 'Next >>'.</p>

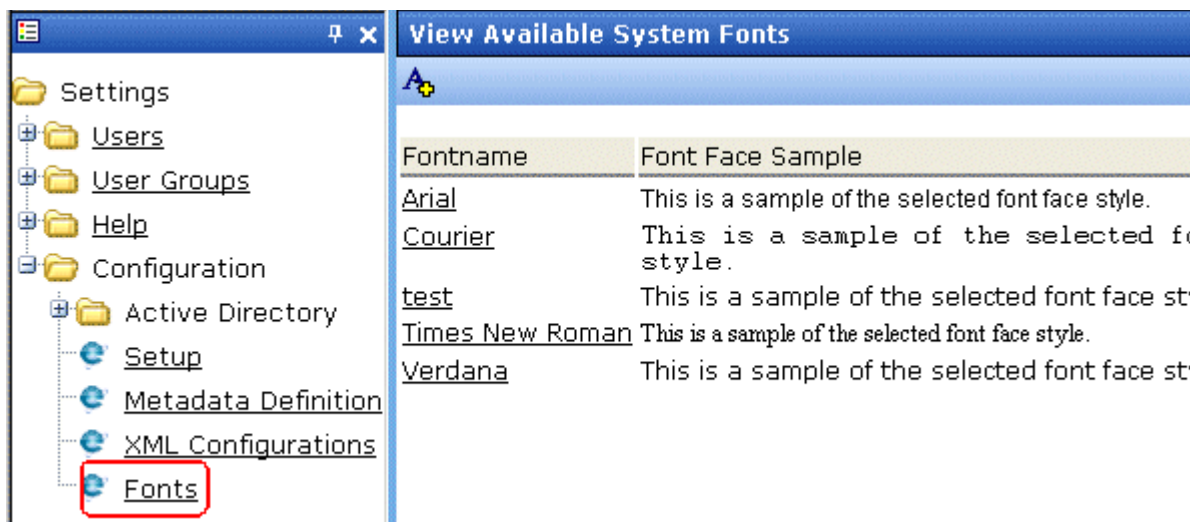
Step	Setup Screen
6. The Verify Ready All dialog box appears. Click Install Now .	 A Windows-style dialog box titled "WebFldrs Verify Ready All Dialog". The main text asks "Are you ready to install?". At the bottom, there are three buttons: "Cancel", "<< Previous", and "Install Now".
7. The Action dialog box appears. The Setup is installing Web folders.	 A Windows-style dialog box titled "Action!". The main text says "Writing system registry value". Below this, it shows a registry key: "Key: HKEY_LOCAL_MACHINE\C0A0F-43...: WECAP12.FpMe". There is a text input field below the key name and a "Cancel" button on the right.
8. The We Are Done dialog box appears. Click OK .	

Font Manager

As an administrator, you can add, edit, and delete fonts to and from the Ektron CMS400.NET application. By adding fonts, you are allowing the content contributors to use them when creating content. Administrators can also edit the name of a font, and delete a font from the system.

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

Below is the Font Manager screen.




NOTE Only members of the Administrator User Group can view, add, or edit fonts.

Adding Fonts


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

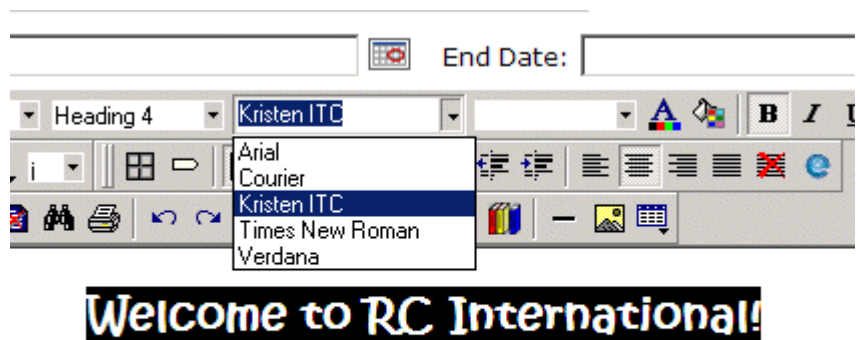
1. From the left frame of the Workarea, click **Settings > Configuration > Fonts**.

2. Click the Add Font button ().
3. The add font screen is displayed.



The 'Add Font' dialog box is shown. It has a blue title bar with the text 'Add Font'. Below the title bar is a light blue area containing a floppy disk icon and a left-pointing arrow. Below this is a text field labeled 'Font Name or Family:'.

4. Enter the font name or family into the text field provided.
 5. Click the Save button ().
- The new font is available to use when adding or editing content.



al is dedicated to the RC racing enthusiasts! We eat, work, play
e short years RC International has become one of the leading m
d this website. Our dedication to the sport and the enthusis

Viewing Fonts

When viewing fonts, you can also edit or delete them.

To view a font:

1. Access the font manager in your Workarea as described in ["Adding Fonts" on page 368.](#)

2. Click the font you want to view.


Fontname	Font Face Sa
<u>Arial</u>	This is a samp
<u>Courier</u>	This is a
<u>Kristen ITC</u>	This is a samp
<u>Times New Roman</u>	This is a sample
<u>Verdana</u>	This is a sam

3. The view font screen is displayed.

Edit Fonts

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


To edit a font name, follow these steps.

1. Access the view font screen, as described in ["Viewing Fonts" on page 369](#).
2. Click the Edit button (.
3. The Edit Font screen is displayed.

Edit Font "Arial"




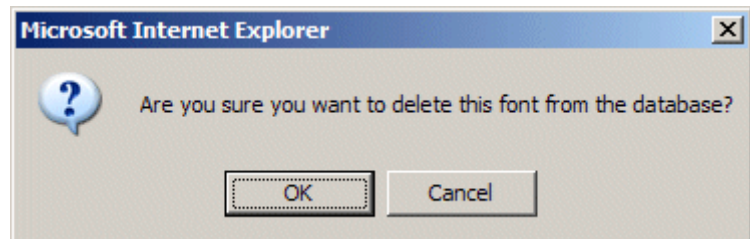

Font Name or Family:

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

Delete Fonts

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

1. Access the view font screen, as described in ["Viewing Fonts" on page 369](#).
2. Click the Delete button ().
3. A message is displayed.



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

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

Managing Tasks

NOTE

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

Tasks are typically assigned to content to help you monitor and manage changes to your Web site. Within Ektron CMS400.NET, users can assign tasks to themselves and other users. Tasks may include updating content, publishing content, updating an image and reordering a collection.

There are two kinds of tasks:

- Tasks not assigned to content
- Tasks assigned to content

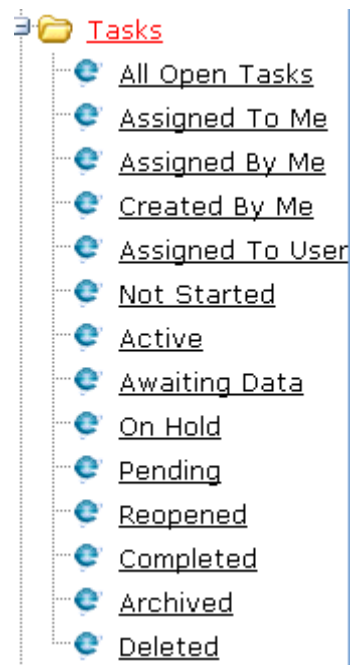
A standard Ektron CMS400.NET user only sees tasks that are either assigned to or by himself. However, an administrator can view all tasks regardless of who they are assigned to or by.

This chapter explains how to access, manage, and assign tasks via the following topics:

- “The Tasks Folder” on page 373
- “Task Permissions” on page 373
- “Task Categories and Types” on page 374
- “Automatic Creation of Tasks Associated with Content” on page 383
- “Task States” on page 391
- “Task View Options” on page 394
- “Email Notification” on page 398
- “Archiving a Task” on page 398
- “Deleting a Task” on page 399
- “Purging a Task” on page 400

The Tasks Folder

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



Task Permissions

Assign task-related permissions on the screens indicated below.

Permission	Where assigned
Create task	Manage Members for Role: Task-Create
Redirect task (that is, assign to another user)	Manage Members for Role: Task-Delete
Delete task	Manage Members for Role: Task-Redirect

For more information about the screens listed above, see ["Using the Roles Screens" on page 123](#).

Task Categories and Types

Tasks can be assigned a Task Category, then a Task Type. This gives users an additional way to filter their tasks.

Task Categories and Task Types have a hierarchical relationship: the Task Category is the parent, and the Task Type is the child. So, several types can be assigned to each category.

Some examples of Task Categories might be Engineering, Sales, Documentation, or Web Design. Examples of Task Types might be Edit Content, Update Documents, or Contact Customer.

NOTE

Only members of the Administrator User Group can view, add, or edit task categories and types.

You can create Task Categories and Task Types from three locations.

- When adding a task. See A/so: **Ektron CMS400.NET** User Manual section "Managing Tasks" > "Creating a Task via the Task Folder" When editing a task.
- When working in the View Categorization screen.




View Categorization Screen

The View Categorization screen allows administrators to work with Task Categories and Task Types. From this screen you can create, edit, and delete them.


To access the View Categorization Screen, access the **Workarea > Settings > Configuration > Task Types**.

The following screen appears.


View Categorization


☐ Check to Delete Task Category

☐  Content

Check to Delete	Task Type Title	Availability
<input type="checkbox"/>	<u>New Content</u>	Available
<input type="checkbox"/>	<u>Review</u>	Available
<input type="checkbox"/>	<u>Spelling</u>	Available

cannot delete  Form Submission Task Category



Check to Delete	Task Type Title	Availability
cannot delete	<u>Form Submission Task</u>	Automatic

☐  Images

Check to Delete	Task Type Title	Availability
<input type="checkbox"/>	<u>Edit Images</u>	Available
<input type="checkbox"/>	<u>New Image</u>	Available

Viewing Task Categories

NOTE The View Categorization screen has a system-defined category (Form Submission Task) that can only be used with forms. You can change its name but cannot delete it. For more information, see the Forms chapter of the Ektron CMS400.NET User Manual.

While in the View Categorization screen, you can collapse and expand Task Categories. To collapse a Task Category, click the () button next to the Task Category name. To expand one, click the () button next to the Task Category name.

The following example shows the View Categorization screen with one Task Category minimized.



Check to Delete	Task Category
<input type="checkbox"/>	Administration

Check to Delete	Task Type Title
<input type="checkbox"/>	Add New User Email
<input type="checkbox"/>	Set Up Email Accounts For I

<input type="checkbox"/>	Docs
--------------------------	----------------------

Creating Task Categories and Task Types

From the View Categorization screen, you can create Task Categories and Task Types by clicking the Add Task Button (📄+). When you do, the following screen appears.

Add Task Type



☒ Add Task Type to Existing Task Category

Administration
▼

☐ Add Task Type to New Task Category

Task Type:
Task Type Description
Task Type Availability:
☐ Not Available

From this screen, you can perform these tasks.

- ["Adding a New Task Category and Task Type" on page 377](#)
- ["Adding a New Task Type to an Existing Task Category" on page 378](#)
- ["Editing Task Category" on page 380](#)
- ["Editing a Task Type" on page 380](#)
- ["Task Type Availability" on page 382](#)

[Adding a New Task Category and Task Type](#)

Adding a New Task Category and Task Type

To add new Task Category and Task Type, follow these steps.

1. Click the **Add Task Type** button (.

2. The Add Task Type Screen appears.
3. Click the **Add Task Type to New Task Category** radio button or in the text box.
4. Enter a name in the **New Task Category** field.

Add Task Type

☐ Add Task Type to Existing Task Category

☒ Add Task Type to New Task Category

Task Type:

Task Type I

Task Type ,

☐ Not Av

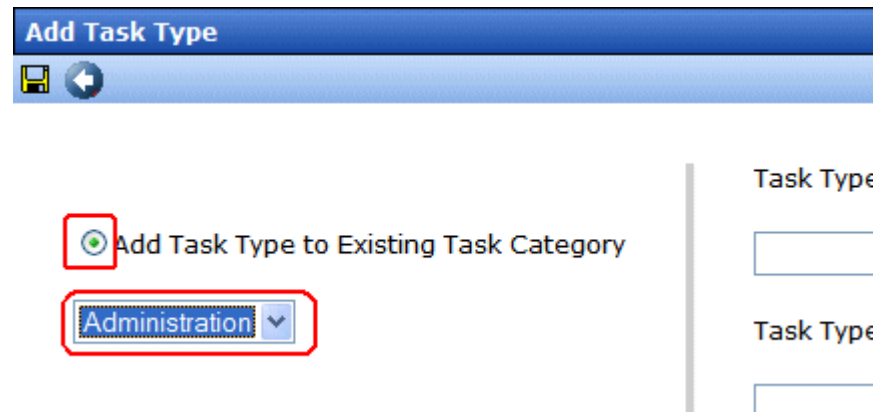
5. Add a Task Type name in the **Task Type** field.
6. Enter a **Task Type Description**.
7. Choose a Task Type Availability. See Also: ["Task Type Availability" on page 382](#)
8. Click **Save** (💾).
9. Your new Task Categories and Task Types appear on the View Categorization screen.

Adding a New Task Type to an Existing Task Category



To add new Task Type to an existing Task Category, follow these steps.

1. Click the **Add Task Type** button (📁➕)

2. The Add Task Type Screen appears.
3. Click the **Add Task Type to New Task Category** radio button or click the drop down box.
4. Choose a category from the drop down box.



Add Task Type

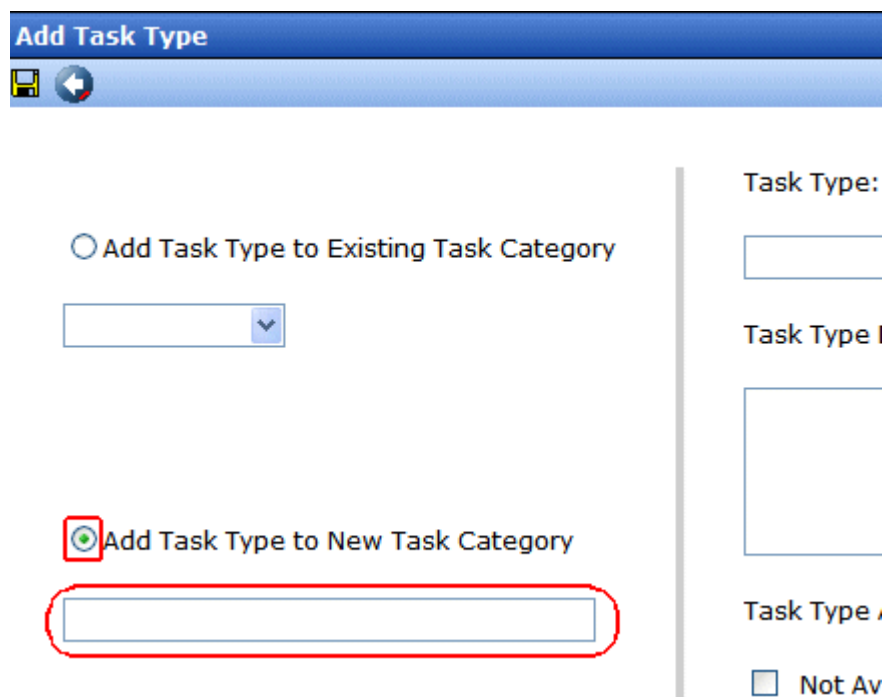
 

☒ Add Task Type to Existing Task Category



Administration ▼

Task Type:

Task Type:



Add Task Type

☐ Add Task Type to Existing Task Category

▼

☒ Add Task Type to New Task Category

Task Type:

Task Type I:

Task Type:

☐ Not Av



5. Add a Task Type name in the **Task Type** field.
6. Enter a **Task Type Description**.


7. Choose a Task Type Availability. See Also: "[Task Type Availability](#)" on page 382
8. Click **Save** (💾).
9. Your new Task Categories and Task Types appear on the View Categorization screen.

Editing Task Category

You can edit a Task Category names. To edit a Task Category, click the Task Category link.

View Categorization




 

<input type="checkbox"/> Check to Delete	Task Category
<input type="checkbox"/>	 Administration

Check to Delete	Task Type Title	Availability
<input type="checkbox"/>	Add New User Email	Available
<input type="checkbox"/>	Set Up Email Accounts For New Users	Available

A text box screen appears next to the category name. Use the text box to change the name.

Task Category

 Administration  

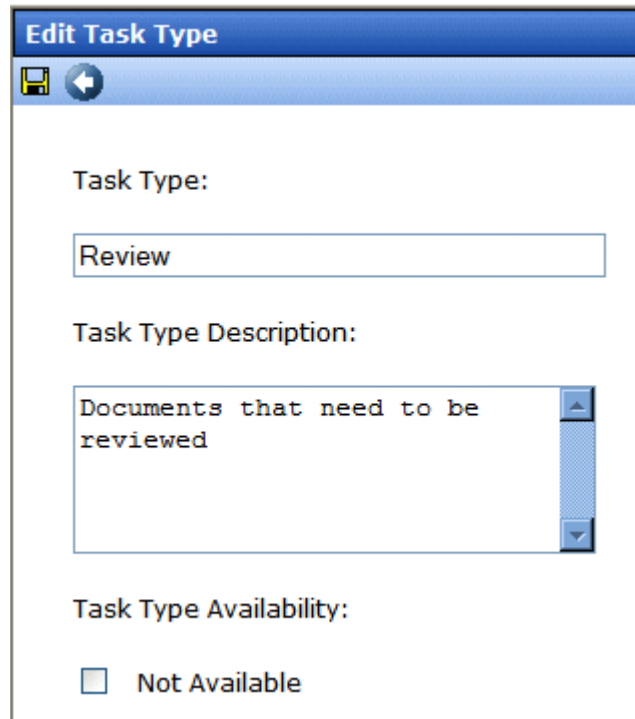
You can either save (💾) the changes, or cancel (🗑️) the edit.

Editing a Task Type

From the View Categorization screen, you can edit a Task Type. This allows you to change the Task Type name, Task Type description, and Task Type availability.

To edit a Task Type, follow these steps.

1. On the View Categorization screen, click a Task Type.
2. The Edit Task Type screen appears.



Edit Task Type

Task Type:

Review

Task Type Description:

Documents that need to be reviewed

Task Type Availability:

☐ Not Available

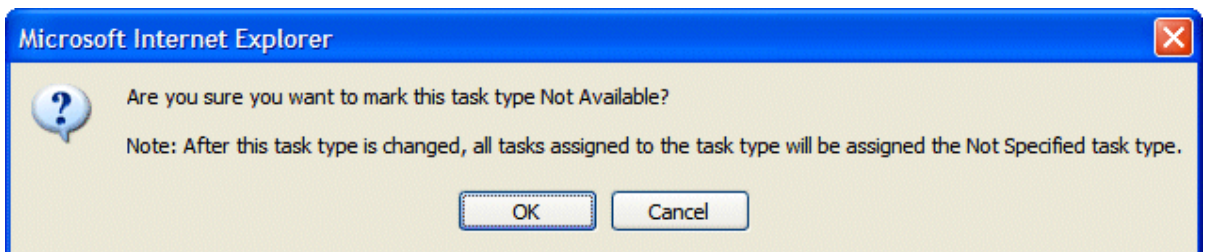
From this screen you can edit the following:

- Task Type
 - Task Type Description
 - Task Type Availability. See *Also: "Task Type Availability" on page 382*
3. Edit the information.
 4. Click Save (floppy disk icon).
 5. The Task Type information is changed.

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 a Task Type not available, you can suppress without deleting it.


When you make a Task Type not available, you see the following warning.



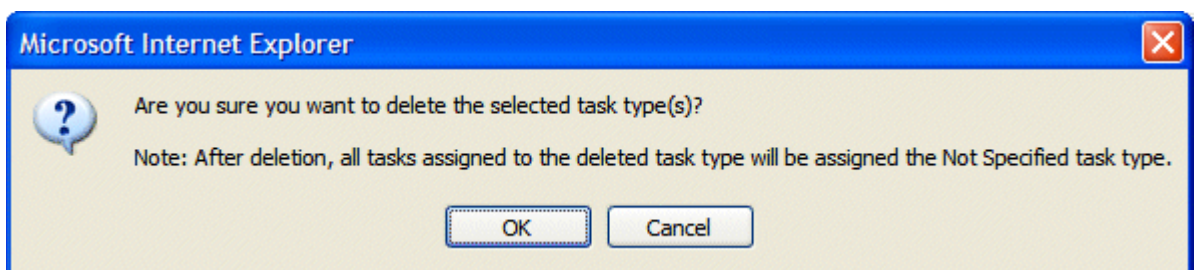
After you make a Task Type not available, the assigned tasks' Type and Category are changed to **Not Specified**.

Deleting Task Categories and Task Types

You can delete Task Types by Task Category or individually.

To delete a Task Type, click the check box next to the Task Type, then click the Delete () button.



When you delete a Task Type, the following appears.



To delete all Task Types, check the **Delete all** check box.

The following example shows which check boxes on the screen are associated with All Task Types, Task Categories, and individual Task Types.

View Categorization

☐ Check to Delete Task Category

☐ Administration

☐ Docs

☐ Moving

☐ Check to Delete Task Type

Check to Delete	Task Type Title	Availability
<input type="checkbox"/>	Add New User Email	Available
<input type="checkbox"/>	Set Up Email Accounts For New Users	Available

Check to Delete	Task Type Title	Availability
<input type="checkbox"/>	Edit	Available
<input type="checkbox"/>	Review	Available

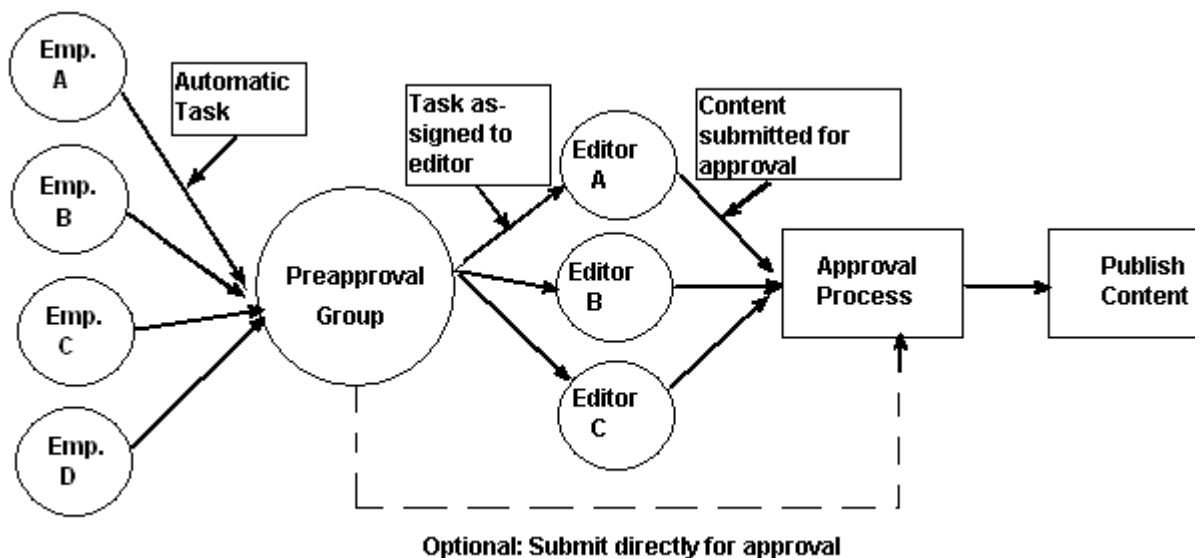
Check to Delete	Task Type Title	Availability
<input type="checkbox"/>	Move	Available
<input type="checkbox"/>	Prep	Available

Automatic Creation of Tasks Associated with Content

In addition to the manual assignment of tasks, they can be automatically generated whenever content, an asset, or a form is created. You would enable and use the Automatic Task Creation feature if you want to set up a *preapproval* process, which requires

one or more users to review and approve content before it enters the regular approval process. (The regular approval process is described in ["Setting Approval Chains" on page 95.](#))

The most common scenario illustrated below.



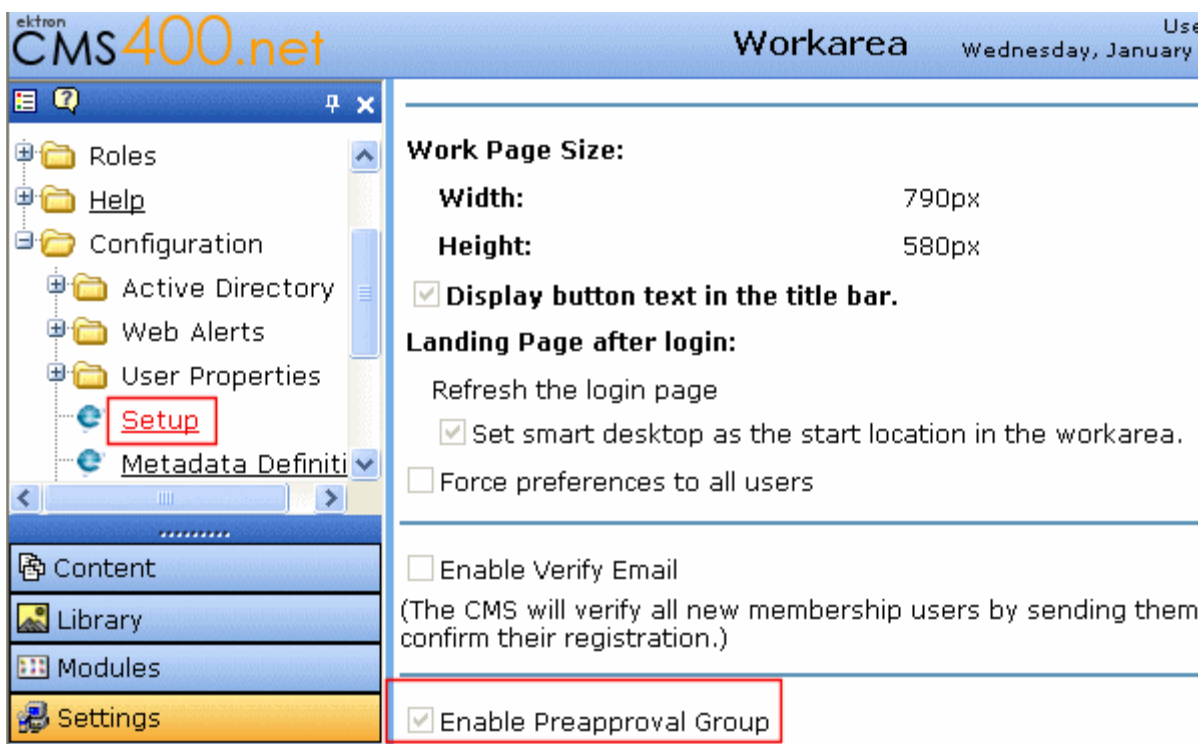
In this example, an automatically-generated task assigns the content to a preapproval group. When any member of that group reviews his tasks, he inspects the corresponding content and assigns it to an editor. After the editor reviews and possibly edits the content and submits it for approval, it enters the normal approval process.

This section explains the automatic task creation process through the following subtopics:

- ["Enabling Automatic Task Creation" on page 385](#)
- ["Assigning a Preapproval Group to a Folder" on page 385](#)
- ["How Automatic Task Creation Works" on page 387](#)

Enabling Automatic Task Creation

The Settings > Configuration > Application Setup screen's **Enable PreApproval Group** field controls **Ektron CMS400.NET**'s Automatic Task feature. Check this box to turn Automatic Tasks on.



Next, you create user groups and assign them to folders whose content must complete the preapproval process before it enters the regular approval process. See ["Managing User Groups" on page 119](#) and ["Assigning a Preapproval Group to a Folder" on page 385](#).

Assigning a Preapproval Group to a Folder


The ability to select or update a folder's preapproval group is determined by the advanced permission **Modify Preapproval**. Only users with this permission can see the Modify Preapproval button (🔑) when viewing the Folder Properties screen. See Also: ["Standard & Advanced Permissions" on page 88](#)

Permissions for Folder "Books"

bject to inherit permissions.

t in this folder is private and can only be viewed by authorized users and members.

Permissions								View Membership users
Name	Collections	Add Folders	Edit Folders	Delete Folders	Traverse Folder	Modify Preapproval		
	x	x	x	x	x	x		
		x	x		x			

If you have permission to modify a folder's preapproval group, go to the Folder Properties screen and click the Modify Preapproval button () to access the **PreApproval Group** field. (The field only appears if you have enabled the Preapproval Feature. See ["Enabling Automatic Task Creation" on page 385.](#))

If you assign a user group, an automatic task can be assigned to that group whenever content in that folder is created or updated.

Edit Properties for the folder "Content"



Preapproval Group:

Select User Group:




(Inherit)
 (None)
Administrators
 Everyone

If you select **Inherit**, this folder gets its preapproval group from the parent folder. If you select **None**, you disable the preapproval feature for the folder.

Preapproval Groups Report

The Preapproval Groups Report lists all preapproval groups assigned to folders within **Ektron CMS400.NET**. To access it, go to **Smart Desktop > Reports > Preapproval Groups**. See Also:

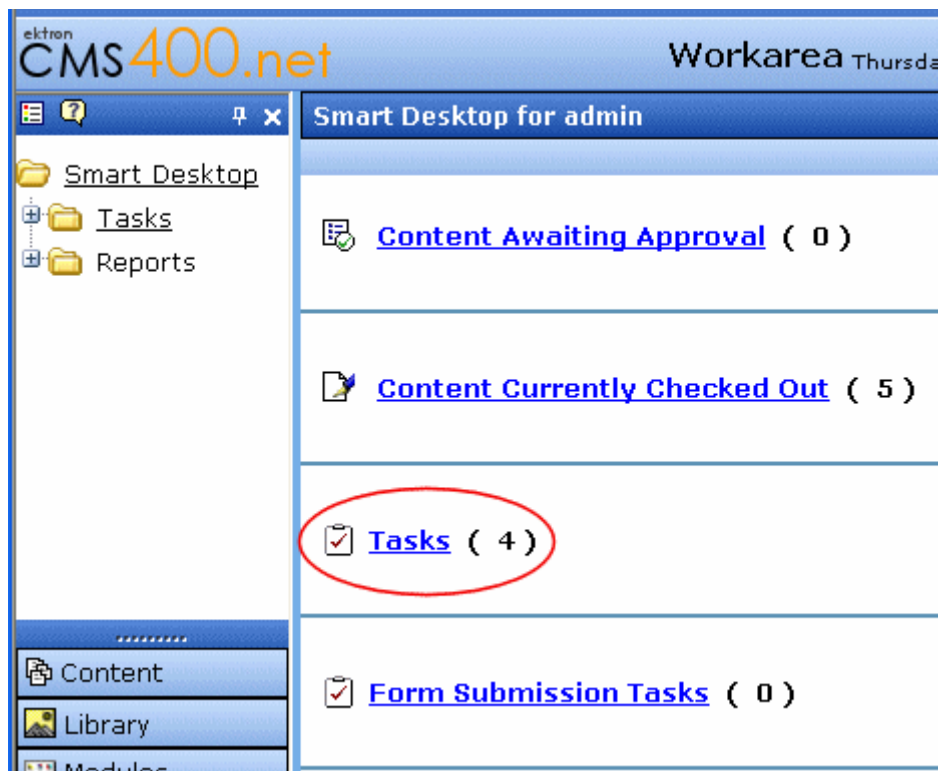
Ektron CMS400.NET User Manual > “The Workarea and Smart Desktop” > “Understanding the Smart Desktop.”

Content Reports: Preapproval Groups Report			
   			
Folder	Folder ID	Preapproval Group	Group ID
Content	0	Administrators	1

How Automatic Task Creation Works

When a user submits a content item for approval, **Ektron CMS400.NET** checks to see if an open task exists for it. (An open task is one whose state is Not Started, Active, Awaiting Data, on Hold, or Pending.) If none exists and a preapproval group is assigned to its folder, a task is created and associated with the content.

At this point, all members of the folder's preapproval group see the task on their Smart Desktop.



The task has the following information.

Field	Value
Title	A string formulated by joining the <ul style="list-style-type: none"> • content title • content ID number • underscore • Task For example, Private Content2_Task
Assigned to	The preapproval group
Assigned by	The user who submitted the content
Content	The content being submitted for approval

Field	Value
Priority	Normal
State	Not Started
Due date	none
Start date	none
Created by	User who submitted content
Description	none

Next, the task can be reviewed by any member of the preapproval group. The member then has two choices.

- review the content and submit it for publishing. This action completes the preapproval process and submits the content into the regular approval chain.
- assign the task to another user, such as an editor. (The user to whom the task is being assigned must have permission to edit the content.) The editor reviews the content, updates it as needed, and submits it into the regular approval chain.

NOTE

The user submitting the content does not need permission to create tasks. Also, the user assigned to the task should not change its state using the task system. Instead, he should review and approve content using the regular content workflow mechanism. That mechanism automatically changes the task's state.

The tables below explain the sequence of changes to content and its associated task. All changes are logged into the task's history. See Also: **Ektron CMS400.NET User Manual** > "Managing Tasks" > "Viewing a Task's History"

Also, email is automatically generated for automatic tasks as it is for manually-created tasks. See Also: "Email Notification" on page 398

Sequence of Task/Content Statuses (Author Lacks Permission to Approve Content)

Event	Content Status	Task Status
Content is created and checked in	Checked In	No auto task assigned
Content is submitted for approval <u>Note: The above action creates the automatic task for the content.</u>	Waiting for completion of associated tasks	Not Started
Content is assigned by a member or preapproval group to an editor	Waiting for completion of associated tasks	Not Started
Editor updates content then checks it in	Checked In	Active
Content is submitted for approval; it enters any approval chain set for the folder <u>Note: Since the task requires an approval, it appears in the task list of the current approver. When the content is approved, the task is moved to the next approver's task list.</u>	Submitted for Approval	Pending
Approver denies request	Checked In	Reopened
Approver approves content	Approved	Complete

Sequence of Task/Content Statuses (Author Can Approve Content)

Event	Content Status	Task Status
Content is created then checked in	Checked In	No auto task assigned

Event	Content Status	Task Status
Content is edited then checked in	Checked In	Active
Content is submitted for approval <u>Note: Although author can approve content, he must click publish twice: once to change content status to Awaiting Completion of Associated Task, and a second time to change it to Approved.</u>	Waiting for completion of associated tasks	Not Started
Content is published	Approved	Complete

Task States

During the life of a task assigned to content, it normally progresses through a series of states. The state helps track a task's progress from creation to completion and even removal from the database. When reviewing the history of a task, the state can be used to review which actions changed the task's state by whom and when.

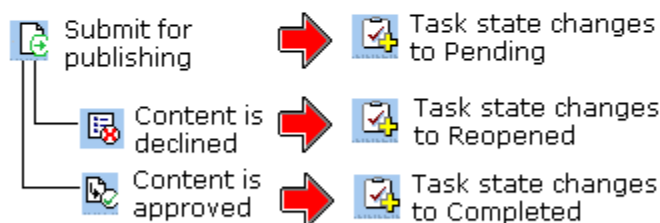
User-Assigned versus System-Assigned States


Some states can only be assigned by users while others are only assigned when an event occurs to the associated content. For example, when content is first submitted for approval, the associated task's state changes to Not Started.

IMPORTANT!

The administrator user can always change a task's state to any other state.

The following graphic illustrates the sequence of user and system actions that change a task's state.



 Admin changes task state to archived, and when no longer needed, to deleted

Progression of Task States

State	Description	Assigned by
Not Started	Assigned when task is created.	User
Active	The task's content is checked out.	System
Awaiting Data	The task is started but the assigned-to user is awaiting data from an external source. You can use comments to indicate the data being waited for.	User
On Hold	Task cannot be worked on at this time.	User

State	Description	Assigned by
Pending	<p>The content is submitted for approval.</p> <p>A task remains pending while its content is in the approval process. When the last person in the approval chain approves the content, the task's state changes to Completed.</p> <p>If any approver declines the content, the task's state changes to Reopened.</p> <p>If an editor edits the content and then checks it back in, the task's state changes to Reopened.</p>	System
Reopened	<p>Content is declined by an approver in the approval process. Also, if someone edits content whose task state is pending, the task's state changes to Reopened.</p>	System
Completed	<p>The last user in the approval chain approves the content and it is being published.</p>	System
Archived	<p>After a task is completed, administrators can assign this state. It no longer appears on open task lists but is kept for reviews and reports.</p> <p>Only the administrator can view Archived tasks.</p> <p>See Also: "Archiving a Task" on page 398</p>	User
Deleted	<p>When an archived task is no longer needed for reporting or reviewing, administrators can assign this state. While in this state, the task remains in the database. See Also: "Deleting a Task" on page 399</p> <p>When you purge the task, it and all of its transactions are removed from the database. See Also: "Purging a Task" on page 400</p>	User (user with delete permission can delete; only admin can purge)

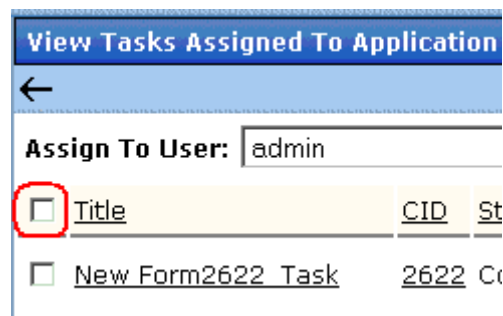
Restrictions on the Task Flow Process

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

Task View Options

Beneath the main task module folder, 14 view screens display all tasks filtered by specified categories. The categories appear in ["The Tasks Folder" on page 373](#).

After viewing tasks in any category, most screens let you perform an action on the tasks (the actions are included in the table below). For example, you can redirect your tasks to another user. To select all tasks on a screen, click the check box in the header row (illustrated below).



Folder	Displays these tasks	Action you can perform from view screen
Tasks	Open tasks assigned to yourself, and open tasks you have assigned to other users.	<ul style="list-style-type: none"> • Create a new task • Delete a task • View a task • Sort tasks by column
All Open Tasks	All open tasks (that is, tasks in one of these states) for all users <ul style="list-style-type: none"> • not started • active • awaiting data • on hold • reopened • pending 	<ul style="list-style-type: none"> • Edit a task • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
Assigned To Me	All open tasks assigned to you	<ul style="list-style-type: none"> • Assign tasks to a different user • View a task • Sort tasks by column
Assigned By Me	All open tasks you assigned to yourself or others	<ul style="list-style-type: none"> • Assign tasks to a different user • View a task • Sort tasks by column
Created by Me	All open tasks you created	<ul style="list-style-type: none"> • View a task • Sort tasks by column
Assigned to User	All open tasks assigned to a user you select	<ul style="list-style-type: none"> • Select any user and view all tasks assigned to that user. To do so, select new user from Assign to User drop down list and click Get Tasks. • View a task • Sort tasks by column
Not Started	All whose state is Not Started <i>See Also: "Task States" on page 391</i>	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column
Active	All whose state is Active	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column
Awaiting Data	All whose state is Awaiting Data	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column

Folder	Displays these tasks	Action you can perform from view screen
On Hold	All whose state is On Hold	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column
Pending	All whose state is Pending	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column
Reopened	All whose state is Reopened	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column
Completed	All whose state is Completed	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column
Archived	All whose state is Archived	<ul style="list-style-type: none"> • Change to any other state • View a task • Sort tasks by column
Deleted	All whose state is Deleted	<ul style="list-style-type: none"> • Change to any other state • Purge tasks • View a task • Sort tasks by column

Determining Which Tasks a User Can View

To provide security, **Ektron CMS400.NET** restricts which users can use the task views. These restrictions are listed on the following table.

View option	Administrator group member	User or group to whom task assigned	User who assigned task	User who created task	All users
All Open *	X				
Assigned by Me		X	X		
Assigned to Me *		X			
Created by Me *				X	
Assigned to User	X	X	X	X	X
Not Started	all tasks in specified state	only tasks assigned to user in specified state			
Active					
Awaiting data					
On hold					
Pending					
Reopened					
Completed		V			
Archived					
Deleted	V				

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

Email Notification

email notification is sent on these occasions.

- A task is assigned to a user.
- A task is redirected to a user.
- A task is submitted for content approval. Sent to the first user in the approval chain.
- The approval process moves on to the next approver.
- The content is declined at an approval stage. This is sent to the assigned user.
- The content is published. This goes to the creator, assigned user, and the approvers.

See *Also*: “Configuring E-Mail Notifications” in the **Ektron CMS400.NET** Setup Manual

Archiving a Task

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

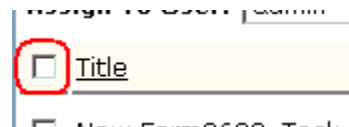
Archived tasks are typically kept for a predetermined time period, at which point an administrator deletes them (depending on your organization’s policies).

To archive a task, follow these steps.

1. From the Smart Desktop, open the Tasks folder.
2. Click the view option corresponding to the state of tasks you want to archive. Typically, you would archive completed tasks.



3. A list of Completed tasks appears. Select tasks one at a time, or click the check box on the top left corner to select all.



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

Deleting a Task

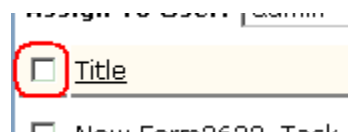
You can easily delete tasks no longer needed on the Web site. Although an administrator can change a task's state to deleted at any time, you typically do so after it is completed or archived, depending on your organization's policies.

Note that a deleted task remains in the system until you purge it. It is only visible on the View Deleted Tasks option. See Also: ["Deleted" on page 393](#).

Tasks can be deleted either one at a time, or several at once.

To delete tasks, follow these steps.

1. From the Smart Desktop, click the **Tasks** folder.
2. Click the view option corresponding to the state of tasks you want to delete. Typically, you would delete archived tasks.
3. Select tasks one at a time, or click the check box on the top left corner to select all.



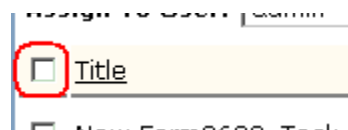
4. Next to the **Change to State** field, click the down arrow to display the drop down list and select **Deleted**.
5. Click the Set button.

Purging a Task

If you want to remove deleted tasks from the system, you purge them. Upon purging, a task and its history are removed from the database.

To purge one or more tasks, follow these steps.

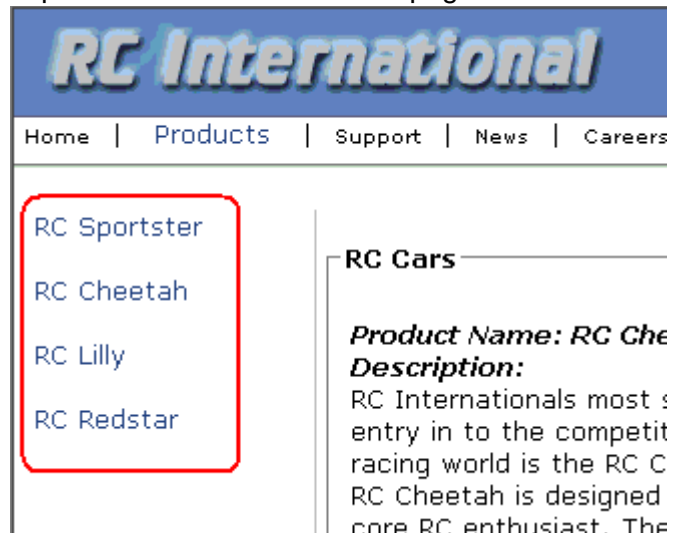
1. From the Smart Desktop, click the Tasks folder.
2. Click the **Deleted** view option.
3. Select tasks one at a time, or click the check box on the top left corner to select all.



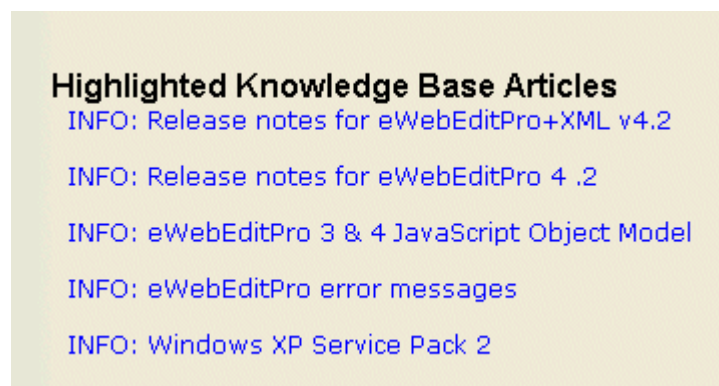
4. Click the Purge button.

Collections

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



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






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

Collection Permissions




Permissions for collections are set in the content folder permissions table, in the advanced permissions section. [“Setting Permissions” on page 86](#)

View Permissions for Folder "Content"

☐ The content in this folder is private and can only be viewed by authorized users and members.

[View Standard Permissions](#)
[View MemberShip users](#)

User or Group Name	Collections	Add Folders	Edit Folders	Delete Folders	Traverse Folder
 admin					x
 jedit					x
 Everyone					x

Menu Feature

Ektron CMS400.NET's Menu feature lets users create and maintain a dropdown menu navigation system for your Web site. Like Collections, the Menu feature gives you the flexibility to display links to content, library assets, external hyperlink and submenus.

This section only describes managing permissions to use the Menus Feature and suggestion for implementing it. For more information about using the Menus feature, see the **Ektron CMS400.NET** User Manual.

Permission to Use the Menus Feature

Only users with permission to use the Collections feature (illustrated below) can work with menus. If user does not have permission to Collections, the menus toolbar button does not appear.



Also, if a user has permission to Collections but Read Only permission for content and the library, he cannot add content from a navigation link.

Implementation of the Menus Feature

In order for a menu to appear on your Web site, your Web developer must modify a page template to display it. This procedure is described in the **Ektron CMS400.NET** Developer Manual section “Ektron CMS400.NET Server Controls” > “List of Server Controls” > “Menu Server Control”.

Calendars

The Calendars feature allows you to create event calendars for your Web site. Once created, users may add calendar events that are posted to the calendar for visitors to see.

NOTE

The User Manual section “Working with Calendars” explains calendar concepts and procedures that end users need to know. This section does not repeat that information. So, you should be familiar with that information before reading this.









Also, the Ektron CMS400.NET Developer’s Manual provides instructions on using the Calendar server control/custom function.




This chapter explains **Ektron CMS400.NET** calendars through the following topics.

- “Calendar Toolbar Buttons” on page 407
- “Accessing the Workarea Using Calendars” on page 408
- “Calendar Permissions” on page 408
- “Adding a New Calendar” on page 409
- “Editing a Calendar” on page 414
- “Deleting a Calendar” on page 414
- “Calendar Event Types” on page 414
- “Displaying Calendars on Web Pages” on page 417
- “Creating a Foreign Language Calendar” on page 418

Calendar Toolbar Buttons

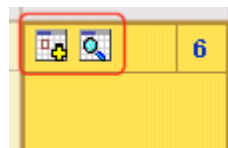
Within the Calendars feature, several buttons (described below) help you perform actions.

Button	Name	Lets you	More Information
	Add Calendar	Access Add Calendar screen	"Adding a New Calendar" on page 409
	Save	Save calendar or calendar event	
	Show Calendar	Display calendar in Workarea	"Viewing a Calendar" in the Ektron CMS400.NET User Manual chapter "Working with Calendars"
	Manage Event Types	Add, edit, and delete Event Types to and from a calendar	"Calendar Event Types" on page 414
	Add Calendar Event	Access Add Calendar Event screen in the Workarea	"Adding a Calendar Event" in the Ektron CMS400.NET User Manual chapter "Working with Calendars"
	Edit	Edit calendar or event name	"Editing a Calendar" on page 414 ; "Editing the Event Type Name" on page 416
	Delete	Delete calendar or calendar event	"Deleting a Calendar" on page 414
	Delete all recurring events	Delete all events in a recurring series	"Deleting All Events in a Recurring Series" in the Ektron CMS400.NET User Manual chapter "Working with Calendars"

Button	Name	Lets you	More Information
	Add Calendar Event	Access the Add Calendar Event screen from calendar on Web page	"Adding a Calendar Event" in the Ektron CMS400.NET User Manual chapter "Working with Calendars"
	View Date	View calendar events for selected day	"Viewing a Calendar Event" in the Ektron CMS400.NET User Manual chapter "Working with Calendars"
	Add Library	Select a library Quicklink for an event.	Hyperlink field description in the Ektron CMS400.NET User Manual chapter "Working with Calendars"

Accessing the Workarea Using Calendars

To access the Workarea after viewing a calendar, you cannot right click the mouse then choose Workarea from the context-sensitive menu as you can with content. Instead, after logging in, click either the Add Events or View Events icon (circled below) to access the Workarea.



Calendar Permissions

Calendar permissions are derived from the content folder assigned to the calendar. This section explains the permissions you can set for a calendar.

Administrator Permissions

Members of the following groups have full control over all calendar features (as they do for content). Only these users can add, edit, or delete a calendar.

- administrator user group
- users and user groups defined on the Manage Members for Role: Calendar-Admin screen. (For more information, see ["Defining Roles" on page 123.](#))

Administrators may also add, edit, and delete calendar events.

User Permissions


Users who are not in one of the groups listed in ["Administrator Permissions" on page 409](#) *cannot* add, edit, or delete calendars.

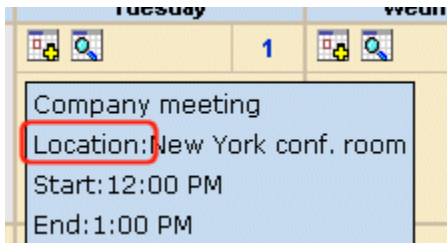
Non-administrator users can add, edit, or delete calendar events *if* they have add, edit, and delete permissions for the calendar's content folder. See *Also*: ["Setting Permissions for a Content Folder" on page 90](#)

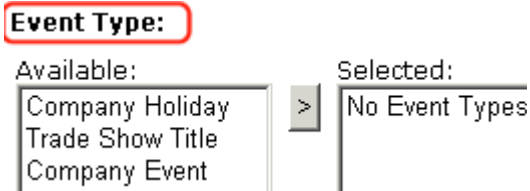
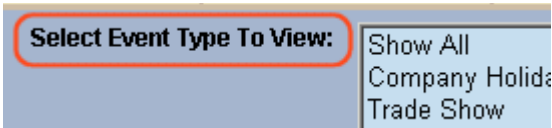
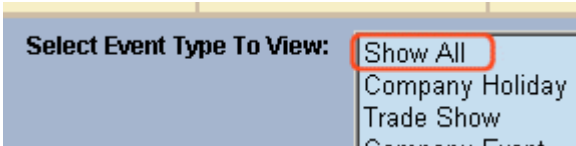
Adding a New Calendar


To add a new calendar, follow these steps.


See *Also*: ["Calendar Permissions" on page 408](#)

1. Access the Calendars screen.
2. Click the Add Calendar button ().
3. The Add or Edit Calendars screen appears. The following table explains each field on the screen.

Section	Description
Title	Enter a calendar title, which identifies the calendar in the Workarea.
Description	Enter a calendar description, which appears on the Calendar Modules screen to help identify the calendar.
Location Label	<p>Specify the label text for the location field. The location appears with the detail of a calendar event.</p> 
Start Time Label	Specify a label for the start time. A calendar event can display the start time.
End Time Label	Specify a label for the end time. A calendar event can display the end time.
Display Weekends	<p>Place a check in this box if you want the calendar to display Saturdays and Sundays along with weekdays.</p> <p>To display weekdays only, remove the check. See Also: "Display Weekends" on page 413</p>
Forward Only	<p>To have the calendar display only events from the date when someone views the calendar forward (but no past events), place a check in the box next to</p> <p>Show only events that fall after the viewing day</p> <p>However, a logged-in user can view past calendar events.</p>






















Section	Description
Event Type Label	<p>One section of the Add Calendar Events screen displays available event types and lets the user assign them to the event.</p>  <p>By default, this text is Event Type:. To change the default text, edit this field.</p>
Event Types Available	<p>If you want to allow users to assign event types to events on this calendar, check this box.</p>
Event Types Required	<p>If you want to require users to assign event types when adding events, check this box.</p> <p>This checkbox can only be checked if Event Types Available is checked.</p>
Instructions	<p>If you allow users to filter a calendar view by event type, text appears at the bottom of the screen that explains how to use the selection box. By default, this text is Select Event Type To View.</p>  <p>If you want to change this text, edit this field.</p>
Show All label	<p>If you allow users to filter a calendar view by event type, the list of event types appears at the bottom of the screen. On top of the list is text indicating that all event types will appear on the calendar. By default, this text is Show All.</p>  <p>If you want to change this text, edit this field.</p>

Section	Description
Long Description	<p>This field can allow the user to enter additional information about a calendar event.</p>  <p>Your choices are:</p> <ul style="list-style-type: none"> • No Long Description - no additional description is allowed • Text Only - while adding an event, a user can enter text into a Long Description box. No formatting is allowed within this text. This text appears in the Event View screen and in the XML Packet. Because the text is not formatted, the XSL creator is responsible for its display. • Rich Text Description - works the same as the Text Only option (see above) except the user can format text using Ektron's eWebEditPro editor.
Content Folder	<p>Specify the calendar's content folder. To understand how folder assignment affects calendar use, see "Calendar Permissions" on page 408.</p>























4. After you enter calendar information, click the Save button ().

Display Weekends

To display seven day weeks (for example, Sunday to Saturday), as opposed to five day weeks (Monday to Friday), check this box.



<< March						April					
Sunday		Monday		Tuesday		Wednesday		Thursday		Friday	
										  1 birthday party	
  3		  4		  5		  6		  7		  8	
				company meeting				test			
  10		  11		  12		  13		  14		  15	

Do Not Display Weekends

<< March					April				
Monday		Tuesday		Wednesday		Thursday			
								  birthday party	
  4		  5		  6		  7		 	
		company meeting				test			
  11		  12		  13		  14		 	

Editing a Calendar

All calendar information, with the exception of the ID, can be edited at any time. To edit a calendar, follow these steps.


1. Access the View Calendar screen for the calendar you want to edit.
2. Click the Edit button ().
3. The Add or Edit Calendar screen is displayed.
4. Make the necessary changes to the calendar, using the table in ["Adding a New Calendar" on page 409](#) as a reference.
5. Click the Save button ().

Deleting a Calendar

You can delete calendars that are no longer needed.

NOTE [Deleting a calendar deletes all events assigned to it.](#)

To delete a calendar, follow these steps.

1. Access the View Calendar Screen for the calendar you want to delete.
2. Click the Delete button ().
3. A confirmation message is displayed.
4. Click **OK**.

Calendar Event Types


Any calendar event can have one or more Event Types assigned to it. An event type might be a meeting, product demonstration, or deadline. When a user views a calendar, he can change the display to view only events that are relevant to him.

This section explains how to manage calendar Event Types through the following subtopics.

- ["Enabling Event Types" on page 415](#)
- ["Viewing Event Types" on page 415](#)
- ["Adding Event Types" on page 416](#)
- ["Editing the Event Type Name" on page 416](#)
- ["Deleting Event Types" on page 417](#)
- ["Assigning an Event Type to an Event" on page 417](#)


Enabling Event Types

To enable event types, edit the calendar and check off the **Event Types Available** box. If desired, you can also check the **Event Types Required** box. This forces the user to specify an event type when adding a calendar event. See *Also: "Adding a New Calendar" on page 409*

Once event types are enabled, the Manage Event Types button () appears on the toolbar.

Viewing Event Types

To view available Event Types, follow these steps.

1. Access the View Calendar screen for the calendar whose event types you want to view.
2. Click Event Types button ()



NOTE

If the Event Types button does not appear in the toolbar, you must make Event Types available. See ["Enabling Event Types" on page 415](#) for more information.

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

From this screen, you can add, edit, and delete Event Types.





Adding Event Types

1. Access the Event Types screen, as described in ["Viewing Event Types" on page 415](#).
2. Click the Add button (.
3. The Add or Edit an Event Type screen is displayed.
4. Type an Event Type name in the displayed field.
5. Click the Save button (.

After you add an Event Type to a calendar, it can be assigned to a calendar event by users. See ["Assigning an Event Type to an Event" on page 417](#) for more information.



Editing the Event Type Name

To edit the name of an event type, follow these steps.

1. Access the View Event Types for [Calendar Name] for the calendar with the Event Type you want to edit, as described in ["Viewing Event Types" on page 415](#).
2. Click the Event Types button (.
3. The View Event Types for [Calendar Name] window opens, listing all Event Types.
4. Click the Edit button (.
5. The Edit an Event Type screen appears.
6. Click the radio button next to the Event Type you want to edit.
7. Click the Edit button (.
8. The Add or Edit an Event Type screen is displayed. Update the Event Type name.
9. Click the Save button (.


Deleting Event Types

To delete an event type from a calendar, follow these steps.

1. Access the View Event Types for [Calendar Name] for the calendar with the Event Type you want to delete, as described in ["Viewing Event Types" on page 415](#).
2. Click the Event Types button ().
3. The View Event Types for [Calendar Name] window opens, listing all Event Types.
4. Click the Remove button ().
5. The Delete Event Types screen displays available Event Types.
6. Check the box next to each Event Type you want to delete.

NOTE

[Click either **Select All** or **Clear All** to check off all or none of the Event Types.](#)

7. Click the Delete button () to delete the Event Type.
8. A confirmation message is displayed.
9. Click **OK**.

[Assigning an Event Type to an Event](#)

Assigning an Event Type to an Event

After Event Types are available, users can assign them to calendar events. This is described in the **Ektron CMS400.NET** User Manual chapter "Working with Calendars."

After users assign Event Types to a calendar event, visitors can filter the calendar view by them.

Displaying Calendars on Web Pages

After a calendar is created, it can easily be inserted onto a Web page. For information about inserting calendars into your Web site, refer to the Ektron CMS400.NET Developers Reference Manual.

Creating a Foreign Language Calendar








As part of the comprehensive multi-language features of **Ektron CMS400.NET**, calendars can be created in any supported language.

Exception

Microsoft's .NET platform supports most languages. If a language is not supported by .NET (for example, Welsh), an English calendar appears instead.

Once you enter the calendar and event information in the foreign language, the calendar display (that is, day and month names) automatically appears in that language. Also, regional conventions for first-last days of the week, and date and time formats are maintained. As an example, see the French calendar below.

[See Screen Sample](#)

<< mars		avril					mai >>	
lundi	mardi	mercredi	jeudi	vendredi	samedi	dimanche		
				  1	 2	 3		
 4	 5	 6	 7	 8	 9	 10		
 11	 12	 13	 14	 15	 16	 17		

Notice that the days and months are translated, and that the week begins on Monday instead of Sunday (as in American English).

And in the daily detail (below), note that date and time format follows French conventions.

WARNING!

In order to see foreign characters and accents, the client PC must have support enabled for that language in Windows. For more information, see <http://www.microsoft.com/globaldev/handson/user/2kintl supp.aspx>.

[See Screen Sample](#)

<< 31/03/2005		vendredi 1 avril 2005	02/04/2005 >>
00:00			
01:00			
02:00			
03:00			
04:00			
05:00			
06:00			
07:00			
08:00			
09:00			
10:00			
11:00			
12:00			
13:00			
14:00			

See Also: "Using an Existing Calendar ID or Creating a New One" on page 419

Using an Existing Calendar ID or Creating a New One

When you create a calendar in a foreign language, you can either use an existing calendar ID or create a new one.

Type	Use when...	For more information, see
Foreign language version of existing calendar ID	You want one Web page that displays a calendar in the language selected by the site visitor	"Creating a Multi-lingual Calendar Using the Same ID" on page 422

Type	Use when...	For more information, see
New calendar ID	The foreign calendar will be placed on its own Web page; there is no equivalent calendar in the default language	"Creating a Multilingual Calendar Using a New ID" on page 423

For example, the following is the English-language version of the sample calendar provided with the intranet. The URL of the following calendar is

`http://localhost/CMS400EXAMPLE/intranet/calendar.aspx?menu_id=15&calendar_id=3&TitleLabel=Company%20Calendar&LangType=1033`

[See Screen Sample](#)

<< March					April				
Monday		Tuesday		Wednesday		Thursday			
								birthc	
4		5		6		7			
		company meeting							
11		12		13		14			
18		19		20		21			
25		26		27		28			

If you create a French version of that calendar, and a user navigates to the same page but views it in French, he sees the French version of the calendar (below). Note that they are separate calendars with separate event listings -- they only share the ID number.

The URL of the following calendar is

```
http://localhost/CMS400EXAMPLE/intranet/
calendar.aspx?menu_id=15&calendar_id=3&TitleLabel=Company%20Calendar&LangType=1036
```

[See Screen Sample](#)

<< mars		avril			
lundi	mardi	mercredi	jeudi	vendredi	samedi
				1	
4	5	6	7	8	
11	12	13	14	15	
18	19	20	21	22	

Creating a Multi-lingual Calendar Using the Same ID

To create a multi-lingual calendar using the same ID number but a different language, follow these steps.

1. Within the Workarea, select **Modules > Calendars**.
2. Select the calendar for which you want to create a version in another language.
3. When the View Calendar Screen appears, pull down the **Add In** box and select the new language.

[See Screen Sample](#)

View Calendar "Intranet Company Calendar"

View In: English (U.S.) Add In: Select a Language

Title: Intranet Company Calendar

ID: 3

Description:

Location Label: Location:

Start Time Label: Start:

4. Complete the calendar information, as explained in "Adding a New Calendar" on page 409.

Creating a Multilingual Calendar Using a New ID

To create a multi-lingual calendar using a unique ID number, follow these steps.

1. Within the Workarea, select **Modules > Calendars**.
2. From the Calendar Modules screen, click to open the **View In** dropdown box.

[See Screen Sample](#)

Calendar modules

View In: English (U.S.)

Title	ID	LangID	Description	Path
Calendar Example	1	1033		\Calendar
Century Medical Training And Events	2	1033		\CenturyMe
Intranet Company Calendar	3	1033		\

3. Select the language for the calendar.
4. The Calendar Modules screen reappears, showing only calendars in the selected language (if any exist).

Complete the calendar information, as explained in ["Adding a New Calendar" on page 409](#).

Content Analytics Feature

The Content Analytics feature lets you track statistics about visits to your web site. You can use it to determine the following kinds of information:

- how often your content was viewed
- how many site visitors viewed for first time, and how many returned
- the most popular *referral pages* (that is, the Web page from which visitors clicked to arrive on your site)

Several options for selecting a date range let you compare activity across different weeks, months, and years.

This section explains the Content Analytics feature through the following subtopics.

- ["Enabling the Content Analytics Feature" on page 425](#)
- ["Determining Which Pages are Tracked" on page 426](#)
- ["Specifying the Frequency of Writing to the Database" on page 428](#)
- ["The Statistical Data" on page 428](#)
- ["Content Analytics Reporting" on page 430](#)

Enabling the Content Analytics Feature

By default, the Content Analytics feature is enabled in the web.config file, under the `<analyticsSettings>` tag. To disable it, set the value of the `enableAnalytics` property to `false`.

```
<analyticsSettings>

<!-- globally enables or disabled all visitor tracking -->

<add key="enableAnalytics" value="true" />
```

If this property is set to `true`, and you later change it to `false`, statistical data remains within **Ektron CMS400.NET**, but no additional data will be collected.

Determining Which Pages are Tracked

Analytic data is tracked for every page that has a Content Analytics server control.

NOTE In order for Ektron CMS400.NET to track page views, the viewer's browser must have cookies enabled.

Inserting a Content Analytics Server Control

For details about dropping this server control onto a page, see the **Ektron CMS400.NET** Developer Manual section “Content Analytics Server Control.”

Best Practice

Drop the control onto an area that does not disrupt the page layout, such as the bottom.

Tracking Pages vs. Individual Content Items

To track visitor activity to a page (for example, `customerservice.aspx`), drop the server control onto it. To track activity for a content item within that page, set the **DefaultContentID** property to the ID of that content.

NOTE You can only track one content item per page.

Display of Analytic Data on Page

If a user is logged in, each page that has a server control displays statistics for that page. So, you can immediately see how many times a page has been viewed, and by how many visitors (as illustrated below).

Our Company Intranet

At the heart of Acme is our commitment to our customers, and our dedication to finding a better way to conduct business effectively and efficiently. Our mission is to develop best-of breed solutions that encompass scalability, flexibility, and ease of use without losing focus of being affordable.

In 1998, William Acme founded Acme Services — based on the philosophy that services should be simple and affordable. Today, Acme is based on the same principle.

Acme released its first product, a services tool that allows users to deliver services quickly and easily. Because this tool is so easy to integrate and use, sales grew and Acme expanded with offices in Amherst, New Hampshire, the United Kingdom, and Germany. Acme's services tool has become a leader in the industry and partnerships have been made with every major services vendor.

As a result, Mr. Acme and his team have had the unique opportunity to work with and listen to thousands of service providers learning exactly how they were using our tool, as well as what challenges they faced and what they most valued in a services management solution. Based on this valuable feedback, Acme developed its first services management platform solution built around Acme's market-leading tool. The solution was outstanding, as it became immediately clear that there was a real need for services management solutions that are easy-to-use and integrate.

Today, Acme's family of products has evolved and grown—with tools and solutions that encompass the latest technologies and solve everyday services problems.

Visitors: 1
Views: 16

You can get a more detailed breakdown of activity for a page by viewing the Top Pages statistics. See *Also: "Top Pages" on page 435*

Specifying the Frequency of Writing to the Database

Once you set up the Content Analytics feature, your database is subject to a continuous barrage of write activity, generated by visits to your site.

To mitigate the effect of this activity on your database's performance, you can hold visit activity in application server memory until a predetermined amount of data is collected. When that amount is collected, it is moved in one packet to the database. So, the database is "hit" much less frequently.

You can specify the amount of data saved in memory prior to being written to the database using these web.config file elements.

- `recordsBeforeWrite` - the number of unique page visits
- `timeBeforeWrite` - the number of seconds since the last time a database write occurred

When either element reaches the value set in web.config, all records stored in application server memory are written to the database. That event also resets the value of both elements to zero (0).

The Statistical Data

For every page view, the following statistical information is captured:

- **url** - the visited page
- **content_id** - the ID of the visited content. Only captured if a content block ID was entered in the server control's **DefaultContentID** property. See A/so: ["Tracking Pages vs. Individual Content Items" on page 426](#)
- **visitor_id** - a unique GUID that identifies a visitor
- **hit_date** - date and time when a page view occurred
- **referring_url** - The URL the user was viewing before jumping to the visited page

- **visit_type** - zero (0) indicates new visitor, 1 indicates returning visitor, 2 indicates all other views. See Also: "[Tracking Site Visitors](#)" on page 429

In a session, the first page hit tracks the visit as zero (0) (if the user is new) or 1 (if the user previously visited the page). From then on, 2 is logged.

Tracking Site Visitors

The Content Analytics feature provides information about visits made by *new* versus *returning* visitors. To capture this data, the feature asks this question whenever a page is visited: is the user logged in as either a membership or regular user?

- If *yes*, capture the user ID with the statistical data
- If *no*, place a cookie on the visitor's computer

So, the first time a user visits a page, either user information is captured or a cookie is created.

The next time the user visits that page, the feature checks the visit history for the user ID, or for a cookie. If either is found, the visit is considered a return.

New Visitor Statistical Tracking

The same user visit may be considered new on one view but not on another. For example, someone visits on January 30 (Monday) then again February 2 (Thursday). On the monthly statistics, that visitor is new, but on the weekly statistics, the February 2 hit would be a return visit (his second this week).

Now consider a second visitor, who browses to your site on the first and 20th of the month. These visits would appear on weekly statistics as two new visits, but on the monthly statistics, only the first visit would show up on that month's tally of new visitors. The second visit would add to the return visitor statistics.

Writing to the IIS Log

In addition to writing Site Analytic data to the database, you can write it to the IIS log. To do this, enable the `appendToIISLog` element in the web.config file.

Note that if you set `appendToIISLog` to `true`, Site Analytic data is written to the IIS log, but does not appear in the Workarea. Only data written to the database appears in the Workarea.

Content Analytics Reporting

The Content Analytics feature has extensive reporting features which are based on drilling down from a top-level view of the entire site, to individual pages, all the way down to individual content items (if specified).

Five levels of reporting are available.

- ["Site Statistics" on page 431](#)
- ["Site Activity" on page 432](#)
- ["Top Content" on page 434](#)
- ["Top Pages" on page 435](#)
- ["Top Referrers" on page 436](#)

Summary of Statistical Data Available

The following table lists the kinds of analytic statistics that can be viewed at each level of the site.

Type of Statistical Information	Site-wide	Page-Level	Content-Level
Views of Any Page	X	X	X
Visitors: New and Return	X	X	X
Pie Chart of New vs. Return Visitors	X	X	X

Type of Statistical Information	Site-wide	Page-Level	Content-Level
Pie Chart of Views/Visitors Ratio	X	X	X
Bar Graph of Views/Visitors Ratio	X	X	X
Visited Pages	X		
Visited Content Blocks	X	X	
URLs from which Site Visitors Accessed Ektron CMS400.NET	X		

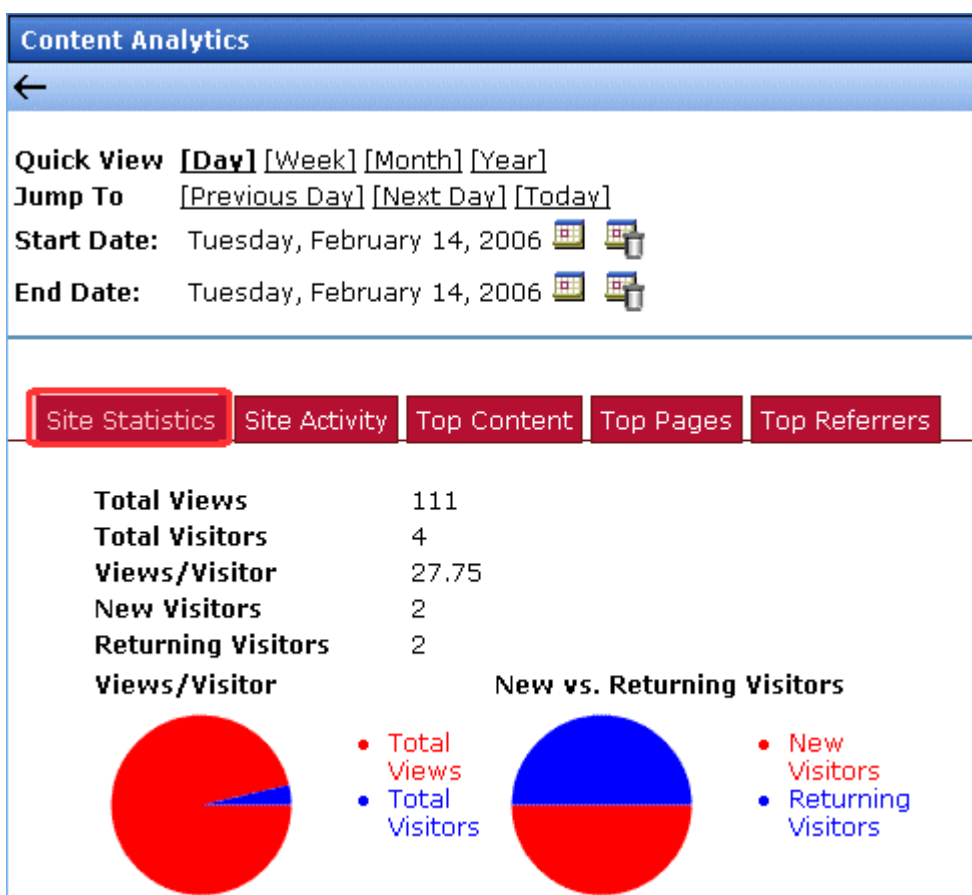
Site Statistics

The Site Statistics screen offers an overview of all tracked activity within the selected date range. You see actual data for the

- number of views
- number of visitors
- ratio of visitors per view
- number of new and returning visitors
- ratio of new to return visitors

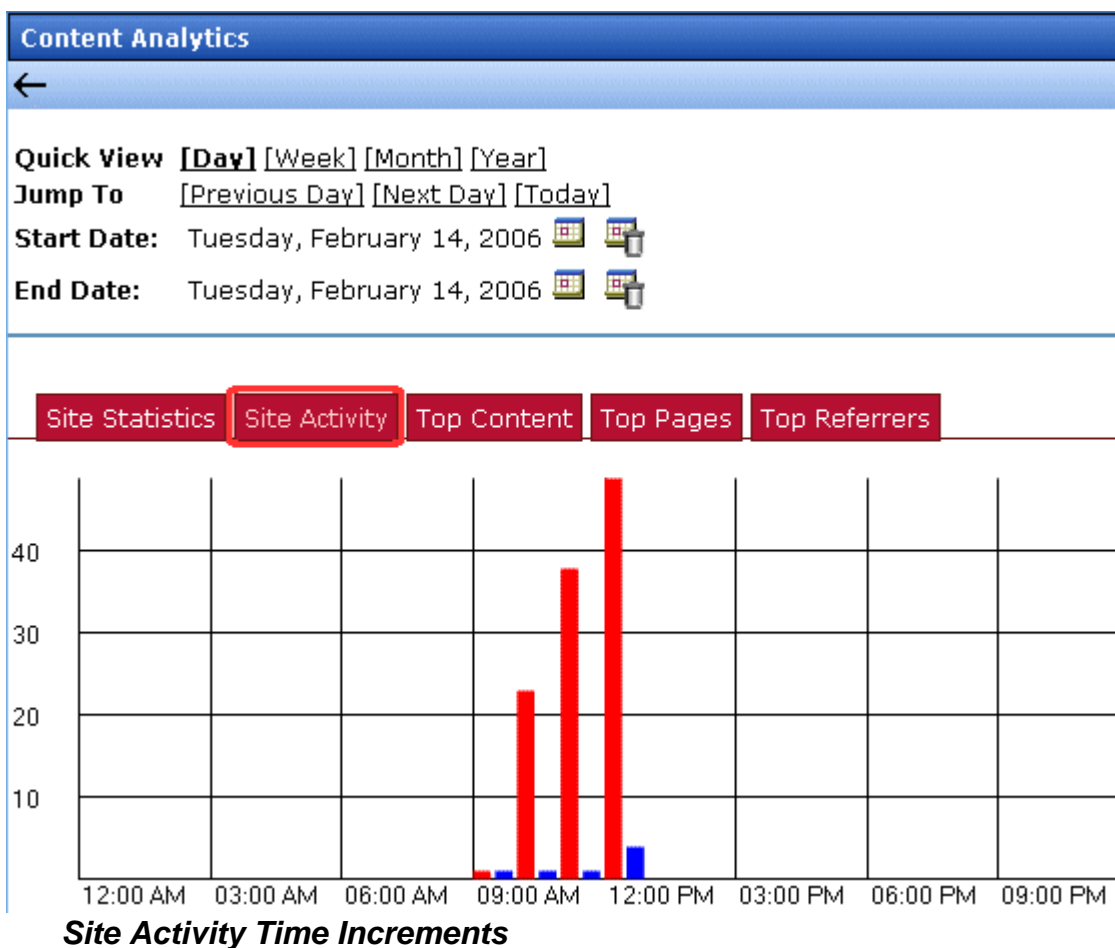
Below this data are pie charts of the ratio of views to visitors and new vs. return visitors.

NOTE [To understand how new and returning visitors are tracked, see "Tracking Site Visitors" on page 429.](#)



Site Activity

The Site Activity view shows relative activity during the selected time period. The red bar indicates views, and the blue bar indicates visitors.



The graph's time increments are one level below the **Quick View** selection. For example, in the screen above, **Quick View** is set to **Day**. So, the statistics are broken down by *hours* of the day.

The following table lists the Site Activity time increments for each Quick View selection.

Quick view time increment	Site Activity Graph display broken down by these units
day	hourly
week	daily
month	weekly
year	monthly

Top Content

The Top Content View shows the most frequently-accessed content items on your Web site.

See Also: ["Tracking Pages vs. Individual Content Items" on page 426](#)

Content Analytics

←

Quick View



[\[Day\]](#)
[\[Week\]](#)
[\[Month\]](#)
[\[Year\]](#)

Jump To

[\[Previous Year\]](#)
[\[Next Year\]](#)
[\[Today\]](#)



Start Date:

Monday, February 14, 2005

End Date:

Tuesday, February 14, 2006

Site Statistics

Site Activity

Top Content

Top Pages

Top Referrers

Content Title	ContentID	Visitors	Views
Intranet	329	1	35

You can click on any content item to view

- **Content Statistics** - statistics for that content item only (See Also: ["Site Statistics" on page 431](#))

- **Content Activity** - relative activity for that content item only
(See Also: "Site Activity" on page 432)
- **Audit Content** - all users who viewed the selected content item; to the right of each user are the date and time when the content was viewed





NOTE

Only users who viewed the content after logging in appear on the list. Visitors to your site who do not log in affect statistics but are not tracked on this report.

Top Pages

The Top Pages View shows all viewed pages on your Web site, with the most frequently-accessed pages on top.

By default, the pages at the top of the list are those with the highest number of unique visitors. You can change the sort by clicking on any column header. For example, to sort the pages by the number of views, click **Views**.

Content Analytics				
←				
Quick View [Day] [Week] [Month] [Year]				
Jump To [Previous Year] [Next Year] [Today]				
Start Date: Monday, February 14, 2005  				
End Date: Tuesday, February 14, 2006  				
<div> Site Statistics Site Activity Top Content Top Pages Top Referrers </div>				
Page			Visitors	Views
/CMS400Example/intranetbasic/index.aspx			4	96
/CMS400Example/intranetbasic/search.aspx			3	11
/CMS400Example/intranetbasic/employees.aspx			2	6
/CMS400Example/WorkArea/Linkit.aspx			1	1
/CMS400Example/intranetbasic/marketing.aspx			1	2

You can click on any page to view



- **Page Statistics** - statistics for that page only (See Also: "[Site Statistics](#)" on page 431)
- **Page Activity** - relative activity for that page only (See Also: "[Site Activity](#)" on page 432)
- **Content in Page** - if a content items was specified for the page in the Content Analytic server control, this view show statistics for the page. You can click the page to view Page Level activity. (See Also: "[Top Pages](#)" on page 435)

Top Referrers

The Top Referrers View shows the Web pages from which your site was most frequently accessed.

Content Analytics

←

Quick View [\[Day\]](#) [\[Week\]](#) [\[Month\]](#) [\[Year\]](#)
Jump To [\[Previous Year\]](#) [\[Next Year\]](#) [\[Today\]](#)
Start Date: Monday, February 14, 2005  
End Date: Tuesday, February 14, 2006  

Site Statistics

Site Activity

Top Content

Top Pages

Top Referrers

Page	Referrals
http://www.yahoo.com	387
http://www.google.com	219

Changing the Date Range of the Statistical Data

When you first view statistical data, the default date range is today (one day).

If you view statistics for different date ranges, when you return to the screen, the last selected date range is the default selection. You can change it if needed.

Using Quick View Options

Use **Quick View** options to view analytic statistics for any of the following time periods.

- one day
- one week
- one month
- one year

When you click **Quick View [week], [month] or [year]**, the current end date is used as the *last* day of the range. Here are some examples.

Quick View Option	If end date is today, begin date is
Week	one week earlier than today
Month	one month earlier than today
Year	one year earlier than today

Using Jump To Options

Use **Jump To** options to view analytic statistics for a time period before and after the current date range. The time period is determined by the Quick View increment. For example, if the Quick View option is Day, you can *jump to* the previous day, the following day, or today.

Regardless of the Quick View increment, you can always view statistics for today.

Quick View Option	“Jump to” options
Day	<ul style="list-style-type: none">• previous day• next day• today
Week	<ul style="list-style-type: none">• previous week• next week• today
Month	<ul style="list-style-type: none">• previous month• next month• today
Year	<ul style="list-style-type: none">• previous year• next year• today

Searching Content on the Web Site

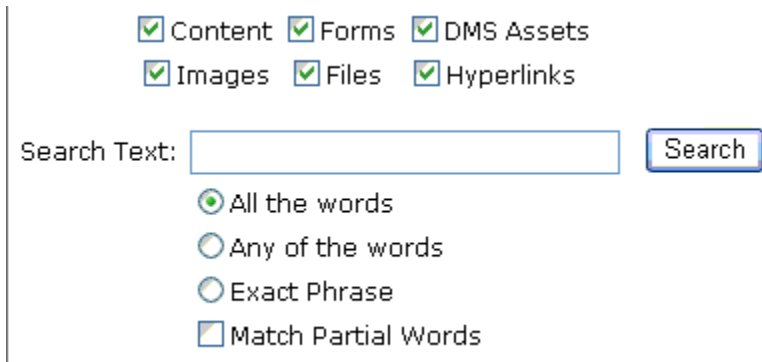
NOTE This section explains how to use the search function on a browser page. For information about inserting the search function into an Ektron CMS400.NET Web template, refer to the Ektron CMS400.NET Developer Manual.

NOTE This section describes the search on your Web site. To learn about searching through the folders of your Content Management System, see "Search Content Folder" on page 45.

Ektron CMS400.NET has a search function that can be easily integrated into any Ektron CMS400.NET template. The search command looks through your Web site content, then displays links to the content found by the search.

IMPORTANT! Each content item includes a **Content Searchable** field. The search only considers content if this field is checked.

When you insert the search function onto a template, it looks something like this on the Web site.



The screenshot shows a search interface with the following elements:

- Search options (all checked):
 - ☒ Content
 - ☒ Forms
 - ☒ DMS Assets
 - ☒ Images
 - ☒ Files
 - ☒ Hyperlinks
- Search Text:
-
- Search criteria (radio buttons):
 - ☒ All the words
 - ☐ Any of the words
 - ☐ Exact Phrase
 - ☐ Match Partial Words

The above is only an example of the search screen. Your Web developer can customize which options appear via the Search Server Control. For more information, see the **Ektron CMS400.NET**

Developer Manual section “Standard ASP.NET Methods” > “Standard Methods” > “Search Server Control.”

When performing a search, the user enters one or more words into the text box, selects the necessary search preferences, then clicks the **Search** button.

Your system administrator can add custom search fields that only appear if a user is logged in. For more information, see ["Metadata" on page 68](#).

NOTE

To help track words and phrases site visitors are entering on the search screen, the Search Phrase Report provides a count of all phrases searched within a date range. In **Ektron CMS400.NET**, this report is available from the **Smart Desktop > Reports**. Documentation for this report is available in the **Ektron CMS400.NET** User Manual section “Content Workflow Reports” > “Search Phrase Report”.

Search Options

Before you select the search preferences, you should understand the difference among them. The explanations below assume you entered these words into the search text field.

- partners
- content
- Monday
- employee
- green

All the Words

All the Words works like an “and” function. The search returns only content that has the words partners *and* content *and* Monday *and* employee *and* green.

Any of the Words

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

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

Exact Phrase

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

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

Match Partial Words

Although you cannot search for wild cards, the Match Partial Words option does almost the same. For example, enter at into the search text field, then check off the Match Partial Words box. The search returns all content with the letters “at”. This search finds words such as **At**, **Bat**, **Chatter**, **Atoll**, **ATM**, etc.

Multi-Language Support

There are several aspects to translating within **Ektron CMS400.NET**. They are listed below.

Type of Translation	Seen by	For more information, see
Content	Content contributors; visitors to your site	"Working with Multi-Language Content" on page 442
Spell check dictionary	Visitors to your site	"Set the Language of Spell Checking" on page 476
Special Character Encoding	Visitors to your site	"Character Encoding" on page 476
Workarea screen labels, alt text, system messages	Content contributors	"Translating the Workarea" on page 476

Working with Multi-Language Content

Ektron CMS400.NET supports the creation of content in any language supported by the Unicode standard. This section explains how to create and work with content in any language.

Overview

First, determine the languages in which your site's content should appear (see ["Determining Which Languages are Available" on page 446](#)). Then, for any content, you can provide editions in each supported language.

To provide multi-language content, you can either create new content or copy and edit existing content. For example, you can begin the creation of German content by copying English content into it, then translating that content into German and deleting the English content.

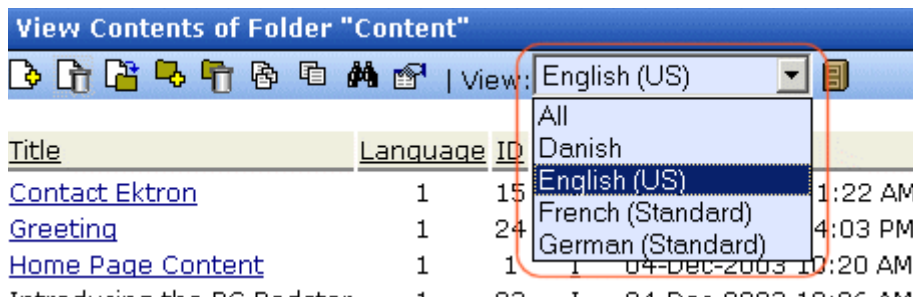
All editions of content have the same ID number but are differentiated by the language attribute. As a result, your Web page template can link to a single content item, but what is displayed is determined by the selected language. There are two ways that content's language can be selected:

- a language cookie, which is created when a visitor enters your site and selects a language
- the link to another page includes the language (`langType`) parameter. For example, `mytemplate.aspx?LangType=1033`.

NOTE

For a list of the decimal values for each supported language, see "Appendix A: List of Supported Languages" on page 696.

The View Contents of Folder screen's **View** field lets you choose a language then view and create content in that language. You can also view *all* content in the folder, regardless of language. This field makes it easy to find and work on content editions in a selected language.



The View Contents of Folder screen also displays the language of each content item. This helps you distinguish them when viewing all content.

Finally, you can set up a separate approval chain for each edition of a content, and can assign collections and tasks in any supported language.

This section describes how to work with a multiple language Web site through the following topics.

- ["Enabling/Disabling Support for Multiple Language Content" on page 444](#)
- ["Viewing Your Site in Another Language" on page 444](#)
- ["Determining Which Languages are Available" on page 446](#)
- ["The Default Language" on page 448](#)
- ["Creating New Content" on page 449](#)
- ["Translating Content" on page 450](#)
- ["Additional Multi-Language Topics" on page 464](#)
- ["Setting Up a Multilingual Web Site" on page 466](#)
- ["Using a Language Other than American English as the Default" on page 470](#)
- ["Resolving Conversion Issues" on page 471](#)

Enabling/Disabling Support for Multiple Language Content

Support for multi-language content is enabled in the web.config file. To enable or disable it, follow these steps.

1. Open the file `webroot\yourwebsite\web.config`.
2. To enable multi-language content, set the value of `ek_EnableMultilingual` to 1. To disable it, set it to zero (0).
3. Save and close web.config.

Viewing Your Site in Another Language

It's easy for your site visitors to view your site in any enabled language. On any screen, your developer can display a language drop-down list (circled in red below).

Lots of new features in Ektron CMS300!

Welcome to RC International!

s dedicated to the RC racing enthusiasts! We eat, work, play, and live RC racing. In : RC International has become one of the leading manufactures of RC racing and flying lication to the sport, and the enthusiasts who play it, has endeared our products to the e will continue striving to improve our affordable products and hope you will become an member.

Trinity In-Line Pipe

and manifold are for rear exhaust now used in both the Sportster and h the manifold and pipe are made aluminum. This new pipe is more 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.

on, Inc. Sample Site



(For more information about the function used to display this, `ecmShowSiteLanguage`, see the **Ektron CMS400.NET** Developer's Manual.) On the sample site provided with **Ektron CMS400.NET**, this drop-down list appears in the lower right corner of the home page, but your developer can place it anywhere on any page.

Another way to indicate which language-edition of content to display is by adding the language parameter (`langType`) to the Quicklink. For example, `products.aspx?LangType=1033` displays the English (US) edition of the `products.aspx` content. This syntax automatically sets the language cookie.

NOTE

For a list of the decimal values for each supported language, see "Appendix A: List of Supported Languages" on page 696.

See Also: ["What Happens if Chosen Language is Not Available" on page 446](#)

What Happens if Chosen Language is Not Available

A visitor to your site uses one of the methods listed above to select a language. **Ektron CMS400.NET** uses the following criteria to determine which language edition to display for content.

1. If an edition of the content is available in the selected language, display that.
2. If option 1 is not available, display an edition of the content in the default language (defined in the `ek_DefaultContentLanguage` variable in `web.config`).

NOTE When **Ektron CMS400.NET** is installed, the default language is English. See Also: ["The Default Language" on page 448](#)


3. If neither edition is available, display nothing.

Determining Which Languages are Available

To determine which languages are available for creating content, go to the Workarea and click **Settings > Configuration > Language Settings**. The Language Settings screen lists all languages in which content can be created on your site.

NOTE Only members of the Administrator User Group can view, add, or edit language settings.

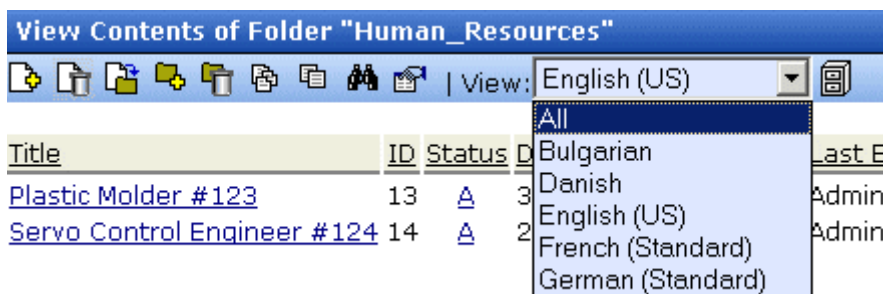
To change the list, follow these steps.

1. Click the Edit button ().
2. The Edit Language Setting screen appears.
3. Check the boxes next to languages you want to make available to your content contributors.

Language settings		
Language Name	ID	Enabled
German (Standard)	1031	<input checked="" type="checkbox"/>
English (US)	1033	<input checked="" type="checkbox"/>
Spanish (Traditional Sort)	1034	<input checked="" type="checkbox"/>
Finnish	1035	<input checked="" type="checkbox"/>
French (Standard)	1036	<input checked="" type="checkbox"/>
Italian (Standard)	1040	<input checked="" type="checkbox"/>
Dutch (Netherlands)	1043	<input checked="" type="checkbox"/>
Portuguese (Brazil)	1046	<input type="checkbox"/>
Albanian	1052	<input type="checkbox"/>
Swedish	1053	<input type="checkbox"/>

The checked languages populate the language drop-down list, which helps visitors to your site select a language. It's also used within **Ektron CMS400.NET** on screens that display multiple languages such as the View Contents of Folder screen (illustrated below).

NOTE The default language on a dropdown list is determined by the value in the **Default Application Language** field in the Configuration Setup screen.



If you choose only one language on the Language Settings screen, fields that prompt the user to select a language do not appear in **Ektron CMS400.NET**. All content is created in that language.

The Default Language

The default language determines which edition of content to display when a visitor to your site does not select a language.

It is also used if a visitor selects a language other than the default, then navigates to page for which content does not exist in the selected language. In that case, **Ektron CMS400.NET** displays that content in the default language (if available).

Within **Ektron CMS400.NET**, the default language determines the default value on the language drop-down lists that appear on every page on which a user can select a language.

When you install **Ektron CMS400.NET**, the default language is English.

Use the following procedure to change the default language for your multi-language Web site.

1. Open the folder `webroot\yourwebsite`.
2. Within that folder, open `web.config`.
3. Set the value of `ek_DefaultContentLanguage` to the locale id of the default language. For example, 1031 for German.

NOTE For a list of locale ids, see ["Appendix A: List of Supported Languages" on page 696](#).

Save and close `web.config`.

See Also: ["Using a Language Other than American English as the Default" on page 470](#)

Disabling a Language

To disable any language, uncheck the accompanying checkbox on the Edit Language Setting screen. (For more information, see ["Determining Which Languages are Available" on page 446](#).)

If you want to disable the default language, you must first assign a new default language. See Also: ["The Default Language" on page 448](#) explains what a default language is and how to assign one.

What Happens to Content When You Disable Its Language

If you disable a language for which content exists, that content remains in the database but no one can access it, either from within **Ektron CMS400.NET** or when visiting your site.

If you later enable that language, the content is once again available.


Creating New Content

To create content in a non-English language, follow these steps.

1. Navigate to the content folder in which you want to create the content. (You must have permission to add content to the folder.)
2. From the language drop-down list, select the language in which you want to create the content.



If the desired language is not available, see ["Determining Which Languages are Available" on page 446](#).

3. Click the Add Content button () and create the content as you would any content. See Also: ["Adding Content" on page 48](#)
4. In order to add metadata to a content, metadata specifications must have been created for the selected language. See Also: ["Metadata" on page 68](#)

Translating Content

When translating content into a foreign language, you have three options.

Option	For more information, see
Copy original content into a new content item in a new language. Then, translate content manually.	"Translating Content Manually" on page 450
Use the computer-based translation tool provided with Ektron CMS400.NET .	"Using Machine Translation" on page 452
Create an XLIFF or XHTML file from existing content. The files are sent to a translation agency and return translated in the new language(s). Then, you import the translated files into the CMS.	"Using the Language Export Feature" on page 455

Translating Content Manually

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


For example, an editor is translating content from French to German. The editor copies the French edition to new content whose language is German. As the editor translates the French edition into German, he deletes the French content. Any images in the content would usually remain, and all formatting (tables, bullets, etc.) is retained.

After signing in to **Ektron CMS400.NET**, you copy content into new content of a different language by either

- navigating the Web site, or
- accessing the Workarea and navigating the folder structure

After copying the original content, translate it into the new language then delete the original text. Both procedures are described below.

Accessing Content via the Web Site

1. Navigate to a page on which you can select the site language. See *Also*: "[Viewing Your Site in Another Language](#)" on page 444
2. Select the language into which you want to translate the content.
3. Navigate to content that you want to translate. You must have privileges to add content to this folder. See *Also*: "[Setting Permissions](#)" on page 86
4. Right click within the content's border and a small menu appears.
5. Click the Add New Language option ().
6. The original language content appears. Translate into the new language then delete the original content.

NOTE

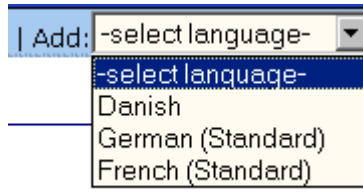
At this point, you can click the Translate Content button () to have the software translate the content. You can then edit it as needed to perfect the translation.

7. In order to add metadata to content, metadata specifications must have been created for the selected language. See *Also*: "[Metadata](#)" on page 68
8. When you save the content, it is saved as the edition of that content in the selected language.

Accessing Content via its Content Folder

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

1. Go to the View Content screen for the content you want to translate. Its status must allow editing (it cannot be submitted or pending).
2. From the View drop-down list, select a original language.
3. Click the content you want to translate.
4. It appears on the View Content screen.
5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content.



6. The original language content appears. Translate into the new language then delete the original content.
7. In order to add metadata to content, metadata specifications must have been created for the selected language. See *Also: "Metadata" on page 68*
8. When you save the content, it is saved as the edition of that content in the selected language.

Using Machine Translation

Ektron CMS400.NET includes a machine translation feature, which can automatically translate content from/to the following languages.

- English
- Dutch
- French
- German
- Italian
- Portuguese (Brazil)
- Spanish

NOTE *Currently, machine translation is not supported for all languages in the Language Settings screen.*

Like most software-based translation, someone fluent in the new language should review the translated content to verify that the translation is appropriate within the context of the page.

The machine translation feature lets you choose a glossary (that is, a field, industry, or subject area). This helps the software find the best translation for a term or phrase with different meanings in different fields.


To use the machine translation feature, follow these steps.

Accessing Content via the Web Site

1. Navigate to a page on which you can select the site language.
See Also: ["Viewing Your Site in Another Language" on page 444](#)
2. Select the language into which you want to translate.
3. Navigate to content you want to translate.


NOTE

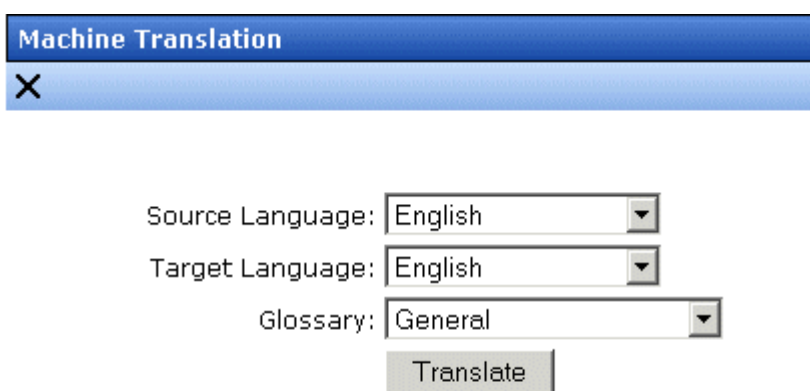
You must have privileges to add content to the folder. See Also: ["Setting Permissions" on page 86](#)

4. Right click within the content's border. A menu appears.
5. Click the Add Content button ().
6. The original language content appears.
7. If the screen uses an XML configuration, select the text that you want to translate.

NOTE

You cannot use Machine Translation to translate field names in an XML configuration. XLIFF files are a good way to translate XML field names. See Also: ["Using the Language Export Feature" on page 455](#)

8. Click the Translate Content button ().
9. The Translation screen appears.



The image shows a screenshot of the 'Machine Translation' dialog box. It has a title bar with the text 'Machine Translation' and a close button (X). Below the title bar, there are three dropdown menus: 'Source Language' set to 'English', 'Target Language' set to 'English', and 'Glossary' set to 'General'. At the bottom of the dialog is a 'Translate' button.

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10. Select the source (old) and target (new) languages.
11. If the content should refer to a specific glossary, select one from the dropdown list.
12. Click the **Translate** button.
13. The translation appears. If it looks OK, press **Paste Content**.
14. The translated content replaces the original content in the editor. Modify as needed.
15. In order to add metadata to content, metadata specifications must have been created for the selected language. See *Also: "Metadata" on page 68*
16. When you save the content, it is saved as the edition of that content in the selected language.

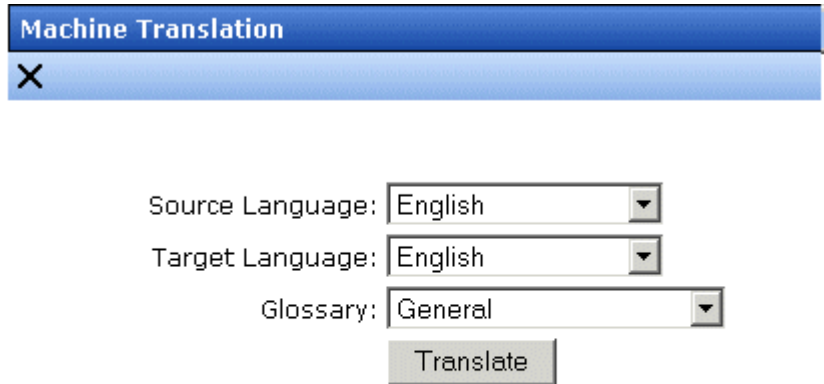
Accessing Content via its Content Folder

To machine translate content by identifying its content folder, follow these steps.

1. Log into the Workarea and go to the View Content screen for the content you want to translate. Its status must allow editing (that is, its status cannot be submitted or pending).
2. From the View drop-down list, select an original language (that is, the language from which it will be translated).
3. Click the content you want to translate.
4. It appears on the View Content screen.
5. Use the **Add** drop down list in the upper right corner to select the language into which you want to translate the content. It must be a language supported for machine translation (English, Dutch, French, German, Italian, Portuguese (Brazil), or Spanish).



6. The original language content appears. Edit the title if appropriate.
7. Click the Translate Content button (.
8. The Translation screen appears.



The image shows a 'Machine Translation' dialog box with a blue header and a close button (X). Below the header, there are three dropdown menus: 'Source Language' set to 'English', 'Target Language' set to 'English', and 'Glossary' set to 'General'. A 'Translate' button is located at the bottom right of the dialog.

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9. Select the source (old) and target (new) languages.
10. If the content should refer to a specific glossary, select one from the dropdown list.
11. Click the **Translate** button.
12. The translation appears. If it looks OK, press **Paste Content**.
13. The translated content replaces the original content in the editor. Modify as needed.
14. In order to add metadata to content, metadata specifications must have been created for the selected language. See *Also: "Metadata" on page 68*
15. When you save the content, it is saved as the edition of that content in the selected language.

Using the Language Export Feature

The Language Export feature lets you copy content into XLIFF files that can be submitted to a translation agency. The agency

translates the files and returns them. In the final stage, you import the translated content back into **Ektron CMS400.NET**.

The Language Export feature lets you translate the following kinds of CMS information.

- content, including summary, comments, and meta data
- forms, including response message, comments, and meta data
- all menus (you cannot choose individual menus)
- file assets (files managed by the DMS, including Office documents, Open Office documents, managed files, etc.)

What is XLIFF?

XLIFF (XML Localization Interchange File Format) is a format that's used to exchange localization data between participants in a translation project. This special format enables translators to concentrate on the text to be translated, without worrying about text layout. The XLIFF standard is supported by a large group of localization service providers and localization tools providers.

To learn more about XLIFF, visit these Web sites:

- <http://www-106.ibm.com/developerworks/xml/library/x-localis/>
- <http://www-106.ibm.com/developerworks/xml/library/x-localis2/>
- <http://www.xliff.org/>

Supported Versions of XLIFF

Ektron CMS400.NET supports the following versions of the XLIFF standard: 1.0, 1.1, and 1.2.

You specify the version you are exporting in the web.config file, using the `ek_XliffVersion` element.

Any version listed above can be imported.

Overview of Exporting/Importing Translation Files

1. You select content to translate. You can select:
 - a content item
 - a folder (all content in the selected folder is selected; all subfolders of the selected folder are also included)


NOTE When translating folders, limit your selection to a small number of content items. Otherwise, the Web site may time out while trying to create XLIFF files.

- all menus
2. **Ektron CMS400.NET** converts the selected content to XLIFF files. You can prepare the files for translation into several languages at once.
A separate .xlf file is created for each item. Then, all .xlf files for a language are compressed into one .zip file. A separate .zip file is created for each language.
 3. Transmit the .zip files to a translation agency, which converts them into the new language(s).
 4. The translation agency returns the files.
 5. You import them into **Ektron CMS400.NET**. If the editions of the content do not exist in the target language, they are created.




Creating the .zip File

To create one or more .zip files for translation, follow these steps.

NOTE Only members of the Administrator User Group and those defined in the Manage Members for Role: XLIFF-Admin screen can create or import XLIFF files. See Also: "Using the Roles Screens" on page 123.

1. To translate *one content item*, navigate to its View Content screen.
To translate *all content in a folder* (and all of its subfolders), navigate to its View Contents of Folder screen.
To translate a menu, go to **Modules > Menus**.
2. Click the Export for Translation button (.
3. The Export for Translation screen appears.






Export for Translation Content "CMS Developer"


Source Language

English (U.S.)

Target Language(s)






	Language	Locale ID	Hexadecimal	Code
<input checked="" type="checkbox"/>	 Dutch (Netherlands)	1043	0413	nl
<input checked="" type="checkbox"/>	 French (Standard)	1036	040c	fr
<input checked="" type="checkbox"/>	 German (Standard)	1031	0407	de
<input checked="" type="checkbox"/>	 Italian (Standard)	1040	0410	it
<input checked="" type="checkbox"/>	 Spanish (Traditional Sort)	1034	040a	es

History

- The language of items being translated appears in the **Source Language** pull-down. If this is not the correct source language, click the down arrow and select the correct one.
- All languages enabled in the Language Settings screen appear under **Target Language(s)**. (See Also: ["Determining Which Languages are Available" on page 446](#)). Click the box in the left column for each language into which you want to translate the content.
- Click the Create XLIFF Files for Translation button (.
- Ektron CMS400.NET** creates one .zip file for each language. The .zip file includes an XLIFF file for each selected content item.


The **History** section of the Export for Translation screen displays the translated files.

Target Language(s)

	Language	Locale ID	Hexadecimal	Code
<input checked="" type="checkbox"/>	 Dutch (Netherlands)	1043	0413	nl
<input checked="" type="checkbox"/>	 French (Standard)	1036	040c	fr
<input checked="" type="checkbox"/>	 German (Standard)	1031	0407	de
<input checked="" type="checkbox"/>	 Italian (Standard)	1040	0410	it
<input checked="" type="checkbox"/>	 Spanish (Traditional Sort)	1034	040a	es

History

	Exported Folder "Form_Example"	2/13/2006	Complete
	Downloadable Zipped XLIFF Files for Translation	2/13/2006	Complete
	 →  French (Standard)		6,412 bytes
	 →  Dutch (Netherlands)		6,415 bytes
	Extracted Form_Example	2/13/2006	Complete

The history lists the .zip file created for each language. (.zip files are indicated by the WinZip icon ().) To the right of the icon are

- the flag of the source language
- an arrow indicating the direction of the translation
- the flag and name of the destination language
- the size of the zip file

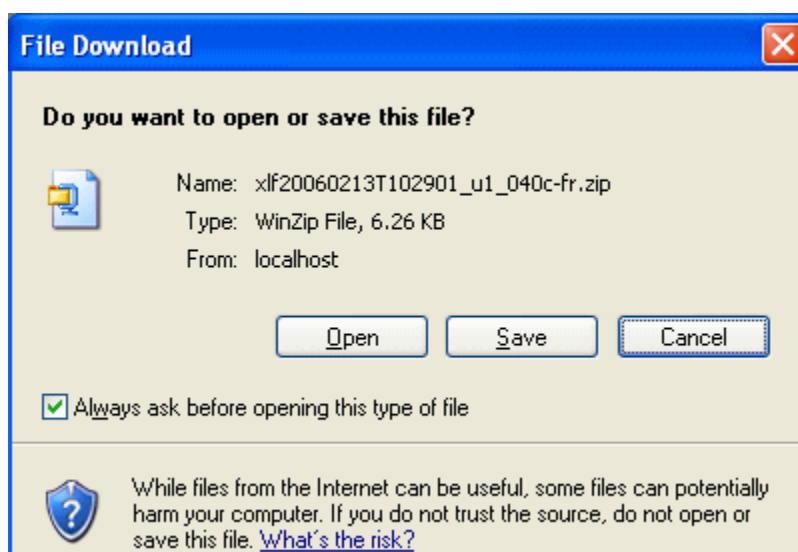
NOTE The top of the history window display the most recently exported/imported files.

8. If you want to review the items in a zip file, click the plus button next to **Extracted**. When you do, each content item's ID number, title, and last edit date appear.

History

	Exported Folder "Form_Example"	2/13/2006	Complete
	Downloadable Zipped XLIFF Files for Translation	2/13/2006	Complete
	→ French (Standard)	6,412 bytes	
	→ Dutch (Netherlands)	6,415 bytes	
	Extracted Form_Example	2/13/2006	Complete
	393 Breakroom Survey		1/31/2006
	380 Contact Information		12/2/2005
	394 Poll: My favorite feature		2/1/2006

- Click the blue text of a .zip file. The File Download window appears.



NOTE If you want to review the XLIFF files within the .zip file, click **Open**.

- Click the **Save** button. The Save As window appears. Navigate to the folder where you want to place the zip file and click **Save**.
- Transmit the files to the translation agency.

NOTE When XLIFF files are returned by the translation agency, their extension must be .xlf. Other than that, the file name is not important.

File Naming Patterns


File Type	Pattern
XLIFF	<p><i>item identifier</i>[<i>item ID</i>][_<i>new language hexadecimal code</i>][<i>two letter new language code</i>].xlf</p> <ul style="list-style-type: none"> <i>item identifier</i> options: <ul style="list-style-type: none"> content: cont form: form menu: s menu item: s <i>item ID</i> varies, depending on whether the item is content, a form, a menu, or a menu item <ul style="list-style-type: none"> content: content ID number form: form ID number Menu: menu ID number Menu item: menu ID number
Zip	<p>xlf[<i>timestamp in format yyyyymmddThhmmss</i>][_u[<i>user ID</i>] _ [<i>new language hexadecimal code</i>]- [<i>two letter language code</i>].zip</p> <p>The user ID indicates which user performed the export or import.</p>

Importing Translated Files into Ektron CMS400.NET


To import the translated files into **Ektron CMS400.NET**, follow these steps.

NOTE Only members of the Administrator User Group and those defined in the Manage Members for Role: XLIFF-Admin screen can create or import XLIFF files. See Also: "Using the Roles Screens" on page 123.

1. Go to **Workarea > Modules > Import XLIFF Files**.
2. Click the **Browse** button and navigate to the folder that contains the translated files.
3. Select the files to import.

4. Click the Upload and Import button (.
5. **Ektron CMS400.NET** creates new or updates existing foreign-language editions of the imported content.
6. Information about the imported file appears in the history area of the Import XLIFF Files screen. You can click plus signs (+) to reveal increasing levels of information about the imported content.









Import Translated XLIFF Files



Select XLIFF files to upload and import. Files must have a .xlf or .zip extension.

	Browse...
	Browse...
	Browse...
	Browse...
	Browse...

History

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">   Imported CONT40~1.XLF </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">   Merged (1) </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">   403 Bonjour </div> <div style="border: 1px solid #ccc; padding: 5px;">   CONT40~1.XLF </div>	<div style="margin-bottom: 5px;">2/13/2006 Complete</div> <div style="margin-bottom: 5px;">2/13/2006 Complete</div> <div style="margin-bottom: 5px;"></div> <div style="margin-bottom: 5px;">Translated</div>
---	---

When you import the file, the comment **Translated** appears next to it.

For each new edition:

- If the content title is the same as the source edition, the next available number is appended to the title to distinguish it from the source. For example: **Henry Williams(1)**.

- its status matches the status of the source content. Typically, its status is checked out. When imported, it can enter the approval process just like other content.
- its history indicates it was checked in at the time the report was run
- for content, the following properties are inherited from the original content:
 - status
 - XML configuration
 - content searchable
 - approval method
- date created and last edit date are captured from when the content is imported
- the last user to edit is captured by user who imported the file

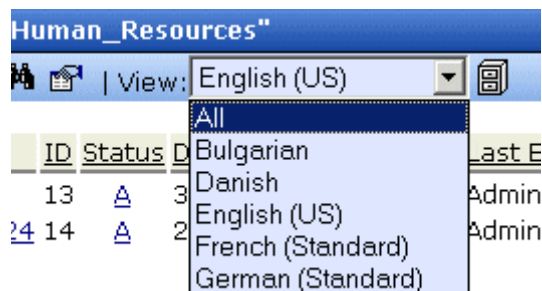
After you import the translation files, **Ektron CMS400.NET** removes them from the file system.

NOTE

If an error exists in any of the files, the erroneous files are moved into a subdirectory. The directory is created using a timestamp. For example: `uploadedFiles\localization\merged\xlf20060208T141841_ul\error\.`

Viewing Foreign Language Content

1. Navigate to the folder that contains the content.
2. Click the **View** language drop-down list and select the desired language.



3. Only content in that folder and the selected language appears. You can perform the same activities with this content as any other content.

Additional Multi-Language Topics

- "Multi-Language Approval Chains" on page 464
- "Working with Tasks in a Multi-Language System" on page 465
- "Working with Collections in a Multi-Language System" on page 465
- "Working with Calendars in a Multi-Language System" on page 465
- "Working with Menus in a Multi-Language System" on page 465
- "Creating an External Link to a Page of Foreign Content" on page 466

Multi-Language Approval Chains

Just as you can create separate editions of content for each enabled language, you can set up a language-specific approval chain and method. When determining a folder's approval chain, first select a language then select users and groups with authority to approve content in that folder and that language.

The screen below shows the language selection drop-down list on the View Approvals screen.

View Approvals for the Folder "Content"

+ | Approval Type: English (US) ▼

Approval Method: Force All Approvers

English (US)
French (Standard)
German (Standard)

User or Group Name	ID
--------------------	----

Only users in the language-specific approval chain for a folder can approve content in that language.

You can also set a language-specific approval method. See Also: ["The Approval Method" on page 101](#)

Working with Tasks in a Multi-Language System

If you create content then add a task to it, the task can be in any enabled language. This would be helpful if, for example, you review English content then want to assign the task of translating it into another language in that language.

If you create a task then try to assign content to it, you can only choose from content in the language of the task.

Working with Collections in a Multi-Language System

In a multi-language **Ektron CMS400.NET** system, you can create a language-specific edition of each collection. For information about doing this, see the **Ektron CMS400.NET** User Manual section "Working with Collections."

Working with Calendars in a Multi-Language System

Calendars can be created in any supported language. Once you enter the calendar and event information in the foreign language, the calendar display (that is, day and month names) automatically appears in that language. Also, regional conventions for first-last days of the week, and date and time formats are maintained.

For more information, see ["Creating a Foreign Language Calendar" on page 418](#).

Working with Menus in a Multi-Language System

NOTE [If you are not familiar with the Ektron CMS400.NET's menus feature, please read "Menu Feature" on page 404 and the Ektron CMS400.NET User Manual section "Working with Menus."](#)

You can create an edition of any menu in every supported language. When a site visitor selects a language, navigates to a page that has a menu and clicks the menu link, **Ektron CMS400.NET** displays the menu in the selected language if it is available. If a menu in that language is not available, nothing appears.

Before creating or translating a menu, it's a good idea to create or translate all content that will be on the menu. In this way, you can link these content items to the new menu. However, after creating a menu, you can always add new items to it.

For details about translating menus, see the **Ektron CMS400.NET** User Manual section "Working with Menus", "Managing Menus", "Working with Menus in a Multi-Language System."

Creating an External Link to a Page of Foreign Content

If another Web site links to a multilingual page on your site, the URL must include the language ID parameter. For example:

`www.ektron.com/web-content-management-solutions.aspx?LangType=1036`

Setting Up a Multilingual Web Site

Ektron CMS400.NET supports content in several languages. This section lists the steps to follow when setting up such a site.

See Also: "Creating Web Pages that Support Several Languages" on page 468

Step	For details, see
1. In web.config, make sure multilingual support is enabled.	"Enabling/Disabling Support for Multiple Language Content" on page 444

Step	For details, see
<p>2. Set a default content language to be the one used by the majority of your site's content.</p> <p>If you had a previous version of Ektron CMS400.NET and selected a default language on the Database Upgrade Utility, be sure that default language matches the one in web.config.</p>	"The Default Language" on page 448
3. Enable languages your site will support.	"Determining Which Languages are Available" on page 446
4. Add language selection function to templates.	"Viewing Your Site in Another Language" on page 444
5. Create a metadata definition for each supported language.	"Adding a Metadata Definition" on page 71
6. Create or translate content.	<ul style="list-style-type: none"> • "Creating New Content" on page 449 • "Translating Content" on page 450
<p>7. Change the language of content not in the default language.</p> <p><u>Note: Only needed if Web site previously had content in more than one language.</u></p>	"Resolving Conversion Issues" on page 471
8. Set up approval chains for new content.	"Multi-Language Approval Chains" on page 464
9. Set up multilingual collections.	"Working with Collections in a Multi-Language System" on page 465
10. Set up multilingual menus.	"Working with Menus in a Multi-Language System" on page 465
11. Modify text on templates.	"Modifying Page Content Based on Language Selection" on page 468
12. Translate graphics.	"Modifying Images Based on Language Selection" on page 469

Creating Web Pages that Support Several Languages

When thinking about setting up your Web site to support content in multiple languages, consider these three actions.

Action	For more information, see
Create language-specific content, menus, collections	<ul style="list-style-type: none"> • "Translating Content" on page 450 • "Working with Collections in a Multi-Language System" on page 465 • "Working with Menus in a Multi-Language System" on page 465 <p>After you create these items, have the page invoke that item dynamically using an appropriate function (such as <code>ecmContentBlock</code>). When Ektron CMS400.NET receives a request to display an item that includes a language and item id number, it returns the language-specific edition. To learn about letting the user select a language from a Web page, see "Viewing Your Site in Another Language" on page 444.</p>
Adjust template content to user language	"Modifying Page Content Based on Language Selection" on page 468
Translate text in images	"Modifying Images Based on Language Selection" on page 469

Modifying Page Content Based on Language Selection

If a template's text should change according to a user's language selection, use a case statement to provide the language-specific content. A good example of this is the template used on the RC international sample site (Illustrated below).



Assume you want to create editions of the menu that runs across the header (**Home**, **Products**, etc.) in three languages:

- English
- French
- German

To do so, follow these steps.

NOTE

This procedure uses the `header.asp` file delivered with the RC international sample site as an example.

1. In the template file, declare each menu option a variable. For example:

```
Dim t_search, t_products, t_support, t_news, t_careers, t_calendar, t_home, t_login,  
t_site_lang, t_contact, t_copyright, calendar_id
```

2. Enter case statements that provide the value of each variable in each language. (1031 is the decimal code for German, 1036 for French.) The following illustrates how to do this for the search menu option.

```
Select Case ContentLanguage
```

```
Case "1031"
```

```
    t_search = "Suche"
```

```
Case "1036"
```

```
    t_search = "Recherche"
```

```
Case else
```

```
    t_search = "Search"
```

```
End Select
```

Now, when a user visits a page controlled by this template and selects French or German as the site language, the page is refreshed and the translated values appear on the template.

Modifying Images Based on Language Selection

Many Web page templates also include images that require translation. You can set up templates to invoke images in the user-selected language by following these steps.

1. For each supported language, create a folder within your Web site's images folder. Name each folder according to the language's decimal id value (for example, German is 1031). See Also: ["Appendix A: List of Supported Languages" on page 696](#)
If your site supports English, don't forget to create a folder named 1033.
2. Copy all images to each language-specific folder.
3. Within each folder, translate the text on each image but *do not change its name*.

WARNING!

If you change an image's name, this procedure will not work.

4. Wherever the image is referenced in your template or Web page, replace the current reference with this:

```
img src="images/<%= Contentlanguage %>/image name"
```

For example:

```
img src="images/<%= Contentlanguage %>/companylogo.jpg"
```

When a visitor to your Web site selects a language then navigates to the page with the image, the `Contentlanguage` variable comes into play. It uses the visitor's language selection value to identify the folder that contains images in that language. That image then appears on the page.

To continue the above example, if a user views the site in German, the code that invokes the image translates to this:

```
img src="images/1031/companylogo.jpg"
```

Using a Language Other than American English as the Default

Use this procedure if your site supports one language only, and it is not American English (1033).

To set your site's default language to something other than American English, follow these steps.

1. Install a new site. Do not log in at this point.

2. Open your site's web.config file (located in your site root folder.) Set `ek_EnableMultilingual` to zero (0). Set `ek_DefaultContentLanguage` to the four digit locale id for the desired language. See ["Appendix A: List of Supported Languages" on page 696](#)
3. Log in to **Ektron CMS400.NET**.
4. Go to **Settings > Configuration > Language Settings**.
5. Enable the desired language, and disable all other languages.
6. Go to **Settings > Configuration > Setup**.
7. Make sure the desired language is the **Default Application Language**.
8. Go to **Settings > Users > Edit User Information**. Set the **User Language** to the desired language. Do *not* leave **App Default** as the value.
9. Repeat Step 7 for every **Ektron CMS400.NET** user.

Resolving Conversion Issues

IMPORTANT!

This section is only relevant to Web sites that upgrade to **Ektron CMS400.NET** Release 4.7 or higher and which, prior to the upgrade, had content in more than one language. If your site does not meet both criteria, you can ignore this section.

When you upgrade to 4.7 or higher, the Database Upgrade utility prompts you to select a language. All content in your site is then assigned that language. (Prior to Release 4.7, content did not have a language attribute.) If all content is not in the selected language, you must resolve that discrepancy.

For example, assume for the sake of simplicity that your pre-4.7 Web site had four content items: three English and one French. During the database upgrade, you select English. Three content items are assigned the correct language, but the fourth content item, which should be assigned French, is also assigned English. You cannot simply change the content's language assignment. When resolving the discrepancy, there are two possible scenarios.

Scenario 1

Prior to 4.7, your site had unique content in French (id number 4). To resolve this, copy the content to a new French edition with the same id number. Then, delete the English edition.

Before Upgrade

Content id	Language attribute	Actual language
1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
4	English	French

After Following Procedure Listed Below

Content id	Language attribute	Actual language
------------	--------------------	-----------------

1	English	English
2	English	English
3	English	English
4 (deleted)	English	English
4	French	French

Procedure for Scenario 1

To change a content item's language, follow these steps.

NOTE

Before beginning this procedure, make sure

- the correct language for the content is enabled. See "Determining Which Languages are Available" on page 446.
- metadata has been defined for the new language. See "Adding a Metadata Definition" on page 71

1. Within **Ektron CMS400.NET**, navigate to the View Content screen on content item 4.
2. From the Add drop-down list, select French.



3. **Ektron CMS400.NET** creates a French edition of the content.
4. Check in that edition of the content.
5. Delete the English edition of the content.

Scenario 2

Prior to 4.7, your site had English and French content (id numbers 3 and 4) that presented the same content in each language. You want to leave the English content alone, create a French edition of

that content with the same id number, then delete the French content.

The advantage of this solution is that both editions of the content have a single id number. So, when a site visitor selects a language and navigates to that page, **Ektron CMS400.NET** displays the edition of the content for the selected language.

To resolve this, create a French edition of the English content, copy the French content, then delete the French content.

Before Upgrade

Content id	Language attribute	Actual language
1	not available	English
2	not available	English
3	not available	English
4	not available	French

After Upgrade

Content id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
4	English	French

After Following Procedure Listed Below

Content id	Language attribute	Actual language
1	English	English
2	English	English
3	English	English
3	French	French
4-(deleted)	na	na

Procedure for Scenario 2

To solve the language conversion issue explained in scenario 2, follow these steps.

NOTE

Before beginning this procedure, make sure

- the correct language for the content is enabled. See "Determining Which Languages are Available" on page 446.
- metadata was defined for the new language. See "Adding a Metadata Definition" on page 71

1. Within **Ektron CMS400.NET**, navigate to the View Content screen of content id 3.
2. From the Add drop-down list, select French.



3. **Ektron CMS400.NET** creates a French edition of content id 3.
4. Translate the title into French.
5. Delete the English elements of content id 3 (content, summary, metadata, schedule, and comments).
6. Check in the French edition of content id 3.

7. Copy and paste all relevant elements of the French content (id 4) into the French edition of content id 3 (content, summary, metadata, schedule, and comments).
8. Delete content id 4. See Also: ["Deleting Content" on page 58](#)

Set the Language of Spell Checking

To specify which dictionary to reference when checking spelling, specify a language in Microsoft Word, version 2000 or later. To do this, open Word and select **Tools > Language > Set Language**.

Character Encoding

The following Ektron Knowledge Base articles describe issues surrounding the display of special characters within **Ektron CMS400.NET**. Note that these articles refer to eWebEditPro, Ektron's WYSIWYG editor embedded within **Ektron CMS400.NET**.

Wherever these articles contain references to eWebEditPro's configuration data or file (config.xml), you should instead update the web.config file, located in your site's root folder.

- HOWTO: produce UTF-8 (www.ektron.com/developers/ewebeditpro_tutorials.cfm?id=403)
- INFO: Character Encoding (www.ektron.com/developers/ewebeditprokb.cfm?id=1807)
- INFO: Encoding special characters (www.ektron.com/developers/ewebeditprokb.cfm?id=384)

Translating the Workarea

You can translate **Ektron CMS400.NET**'s Workarea into French or German by changing the **Default Application** field in the Setup screen. (See ["Default Application Language" on page 25.](#))

If you want to translate the Workarea strings into another language, read this section.

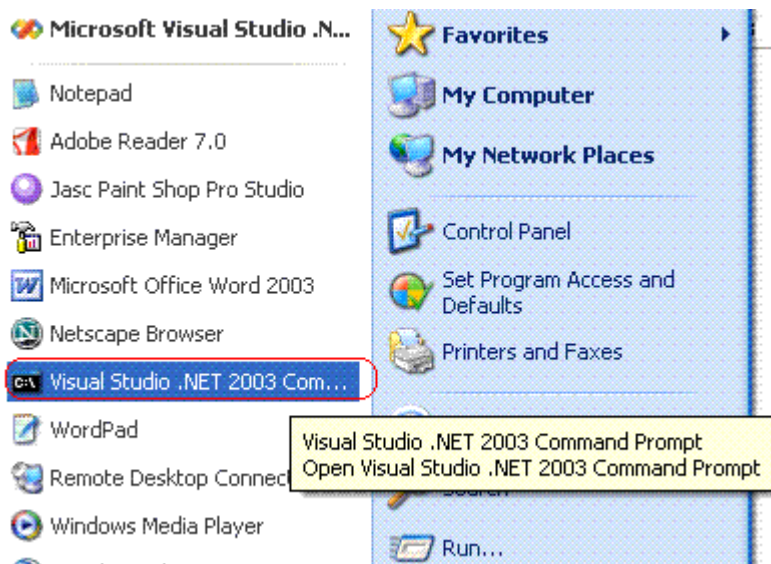
NOTE Ektron provides the American English strings in a text file. You must translate them to the new language.

Prerequisites

- The alphabetical, four-character identifier of the country/ language into which you are translating.
- The server that hosts **Ektron CMS400.NET** must have Visual Studio.NET

Procedure for Translating Workarea Strings

1. Click the Windows **Start** button.
2. Click the Visual Studio.NET command prompt (illustrated below) to open a command window.



3. Within the command window, change the directory to this folder: `your web site\Workarea\resources`.
4. Insert the following text: `resgen EKResource.resources
anyfilename.txt`.

NOTE You can assign whatever name you wish to the .txt file.

5. The .txt file is created in the `\resources` directory.

6. Use Visual Studio.NET to open the .txt file.
7. Replace every backslash (\) with a double backslash (\\).
8. Translate the text following every equal sign (=) to the end of the line. Be careful not to change any occurrences of n surrounded by double backslashes (\\n\\).
9. Save and close the .txt file.

10. Within the command window, insert the following: `resgen
anyfilename.txt EKResource.two-character country code-two-
character language code.resources`

For example, to indicate that the workarea is being translated into the Spanish/Spain, enter `resgen span_translation.txt
EKResource.es-ES.resources`

This command translates all strings in the Workarea to the values you set in Step 8. **Writing Resource File ...Done** appears within the command window when the replacement is completed.

11. A new resource file is created in the `\resources` directory. You determined its name in Step 10.
12. Enable the new language in the Language Settings screen. See ["Determining Which Languages are Available" on page 446](#)
13. Make the new language the default language in the Configuration Setup screen. See ["Default Application Language" on page 25](#).

Support for Multiple Sites

Ektron CMS400.NET's Multi-site Support feature lets you set up and manage several Web sites under one domain. For example:

- `www.ektron.com`
- `support.ektron.com`
- `forums.ektron.com`

You can also set up several Web sites, with each having its own domain and IP address, such as

- `www.ektron.com`
- `www.CMS-tools.com`
- `www.CMS400.com`

In both cases, all sites share a single database. The Multi-site Support feature does not support multiple databases.

Advantages of Multiple Sites

- The URL can communicate to site visitors the nature of the site.
- All sites can share
 - common content, but appear within their own site and templates
 - the library of images and files. These files can be stored once, yet authors can insert them into content from any site.

Prerequisites

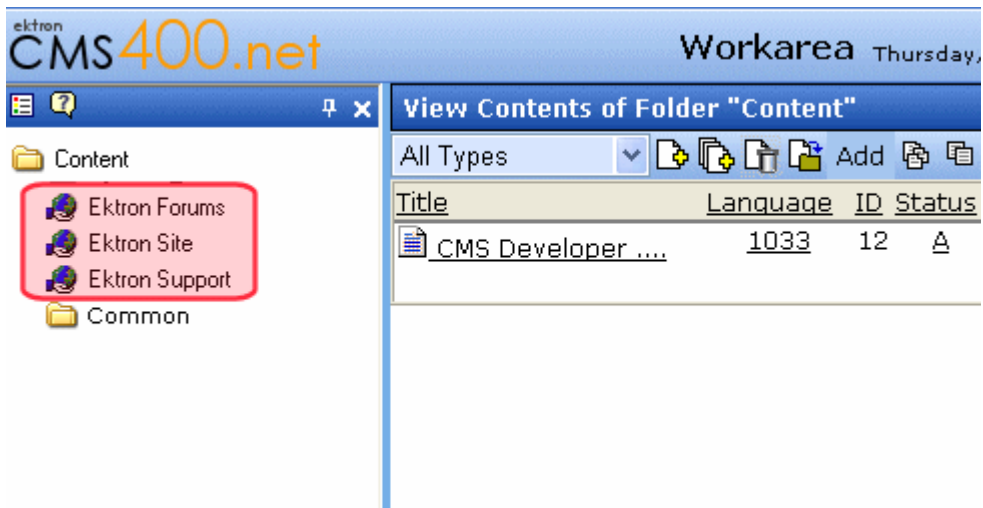
- The server must run Windows Server 2003 or 2005

NOTE Windows XP supports only one Web site.

- The root site, additional sites, and the database must reside on one server
- At minimum, an enterprise license

Using Multiple Sites

When authoring content, sites appear with **Ektron CMS400.NET**'s folder structure look but the icon is a globe (see illustration below) . So, the author can create and edit content in the additional site in the same way he creates or updates content in the root site.



Regardless of which site he is using, an author can use the library to insert hyperlinks, images, files, and quicklinks.

When a folder has at least a production domain assigned to it, it is a *domain folder*. Links to content in a domain folder are activated via `linkit.aspx`, which redirects to the appropriate domain name and uses the appropriate ASPX template for the folder or content.

WARNING!


You cannot create a hyperlink within content, a collection, menu, etc. to a form that resides in another site. This is a security issue in .Net.

Installing the Multi-site Support Feature




1. Install **Ektron CMS400.NET**.
2. In IIS, create a new IP address for each additional site.
3. If the server is used as a staging server with the Site Replication Feature, go to the **Ektron CMS400.NET** Workarea then **Settings > Configuration > Setup**. Edit the setup screen and make sure the **This is a staging server** checkbox is checked. See Also: "[Site Replication](#)" on page 528
4. In **Ektron CMS400.NET**, create a new top-level folder for each site.

WARNING!

You can only use a folder directly under the root folder.

5. Assign multi-site capabilities to each folder created in Step 4. To do this, click the View Folder Properties button () and access the Folder Properties screen. The Multi-Site Domain Configuration fields appear on that screen.

Edit Properties for the folder "Books"

[Properties](#) | [Metadata](#) | [Web Alerts](#) | [Active Types](#)


Foldername:

Description

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

The inherited style sheet for this folder is: /CMS400Example/default.css

Template filename for this folder(affects future content): (leave blank to inherit)

Multi-Site Domain Configuration:

☐ Domain for this folder

Staging Domain - http://

Production Domain - http://

Should Office documents added to this folder be published in other format?

6. In the **Staging Domain** and **Production Domain** fields, insert the domains you created in Step 2.

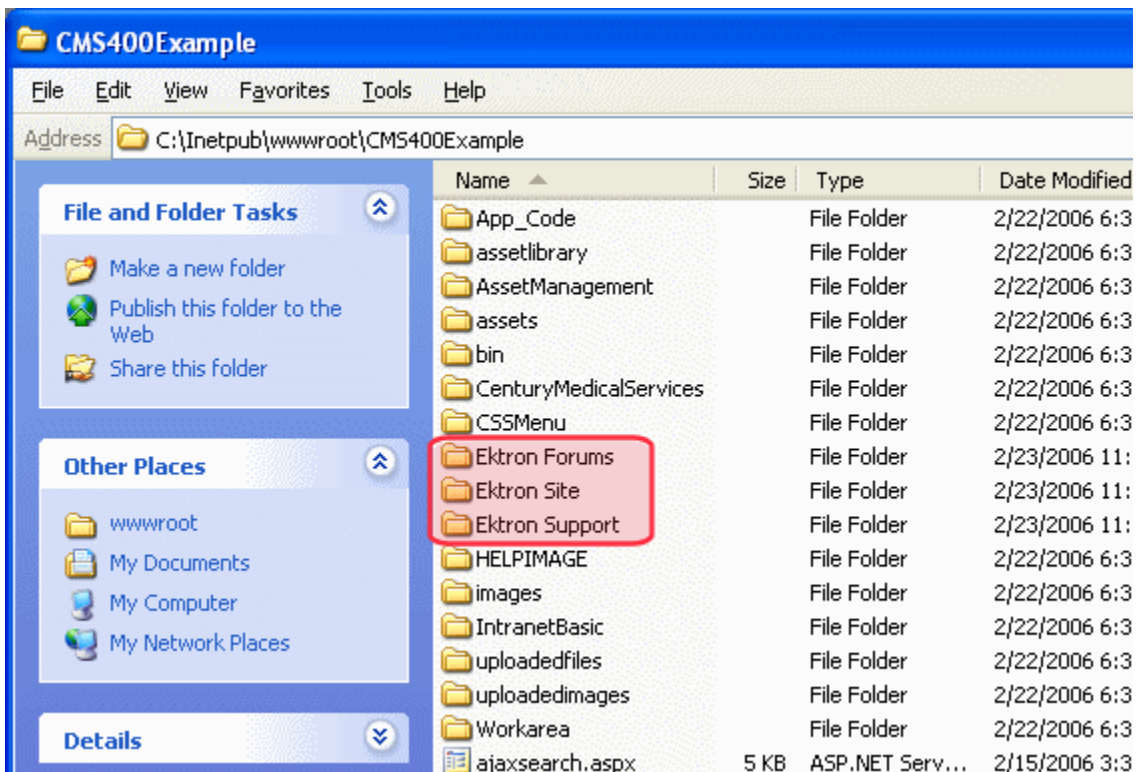
NOTE **Staging Domain** appears only if **This is a staging server** is checked on the [Configuration > Setup](#) screen.

Within **Ektron CMS400.NET**, the new domains are indicated by a globe icon.



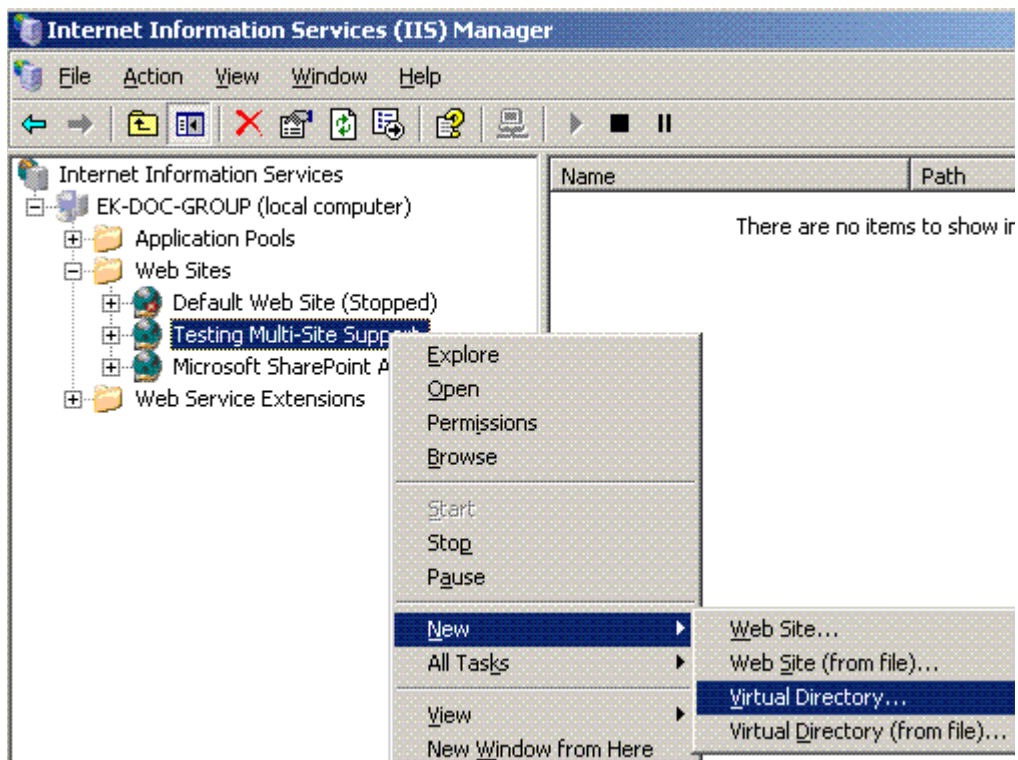
When a folder has at least a domain assigned to it, it is a *domain folder*. Links to content in a domain folder are managed by linkit.aspx, which redirects to the appropriate domain name and uses the appropriate ASPX template for that folder or content.

7. Using Windows Explorer, create a new Windows folder for each new site within the server's file system. Create site folders underneath the site root folder.

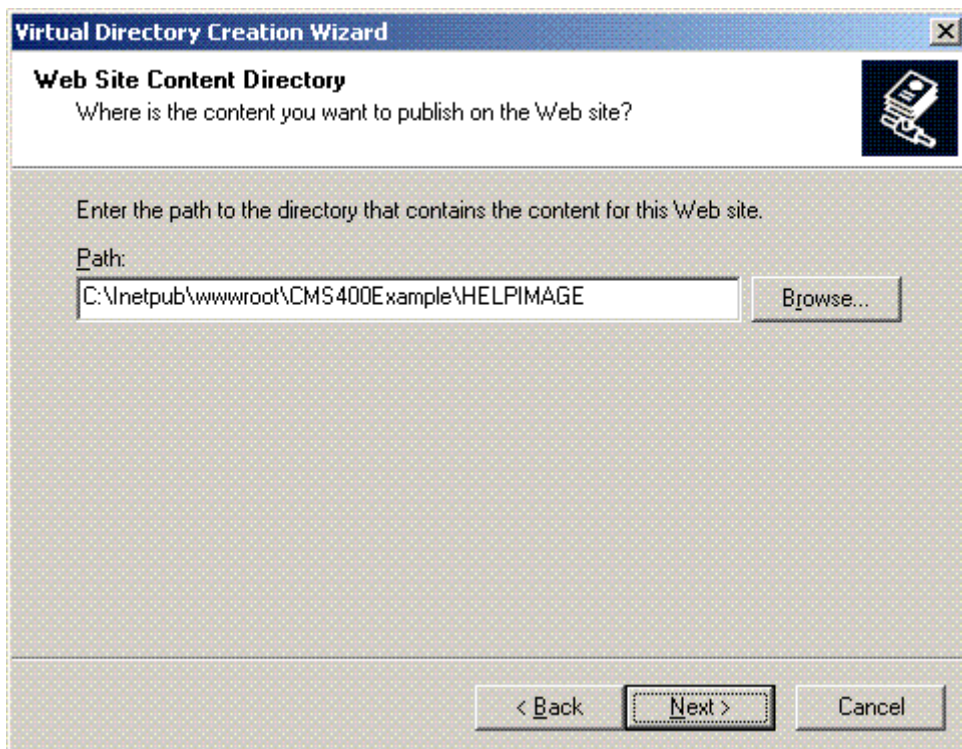


8. Copy the following CMS files from the root folder into each new site folder.
 - all individual files (not subdirectories)
 - these subdirectories:
 - bin
 - WorkArea
 - CSSMenu, App_Code

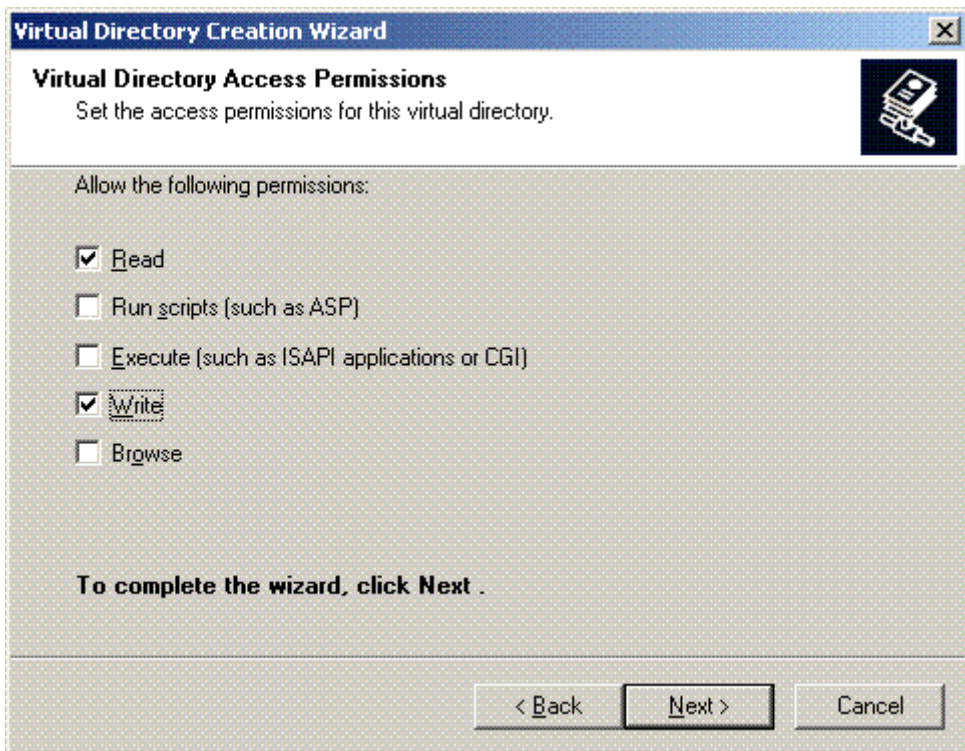
- if you want to include the sample sites,
CenturyMedicalServices and IntranetBasic
- 9. Within each new folder, open the web.config file and update the value of `ek_sitePath` as appropriate for the new site. Most likely, it will be `/site name/foldername/`. For example, `/CMS400Example/Ektron Site/`.
- 10. In IIS, for each new Web site, create new virtual folders for the following shared folders:
 - uploadedfiles
 - uploadedimages
 - images
 - HELPIMAGE



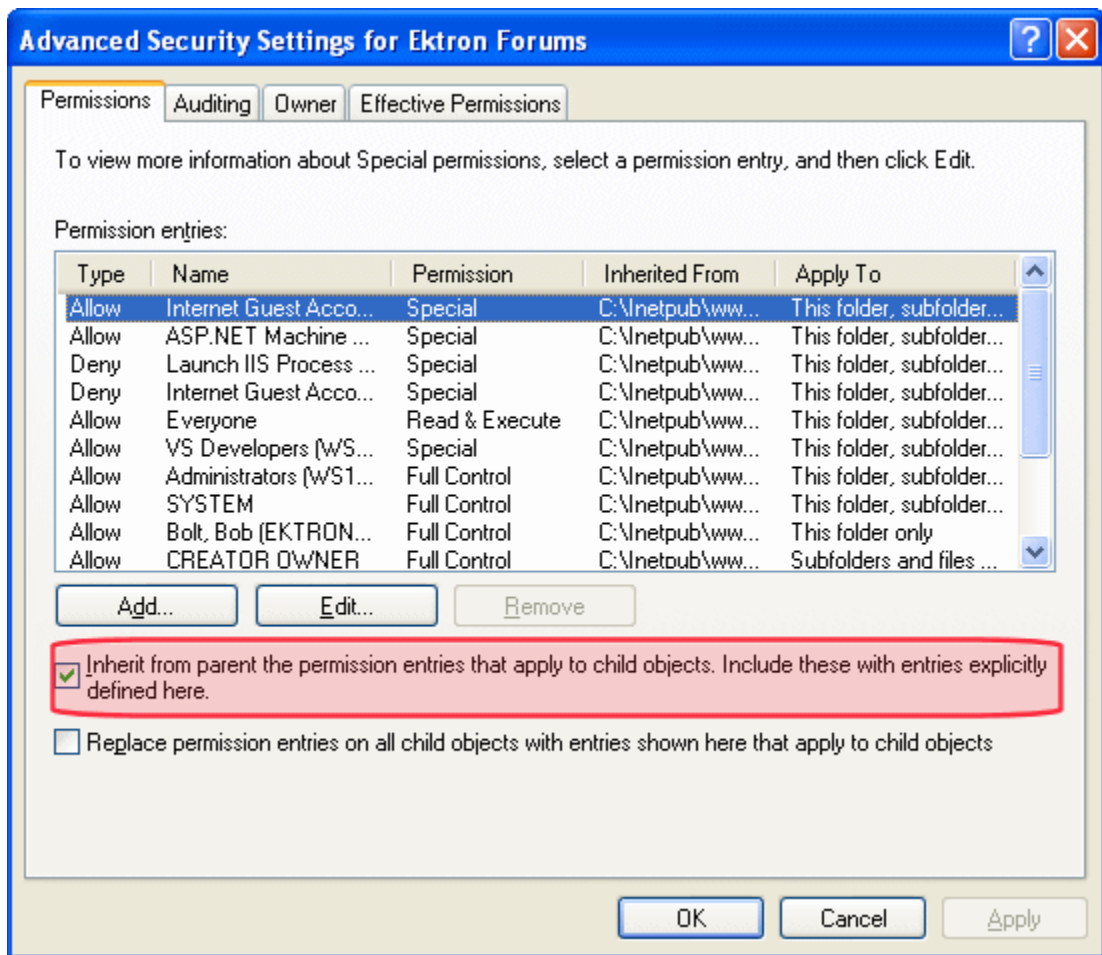
- Link the new folders to corresponding subfolders in the root folder.



- These subfolders need read-only permissions: images, HELPIMAGE.
- These subfolders need read and write permissions: uploadedfiles, uploadedimages



11. Set permissions on the new folders. To do this, follow these steps:
- Using Windows Explorer, navigate to the new folder(s) you created in Step 7.
 - Right click the folder and click Sharing and Security.
 - Click the Security tab.
 - Click the Advanced button.
 - Click the check box next to **Inherit from the parent the permission entries that apply...**



Effect on Site Replication

If you are using **Ektron CMS400.NET**'s Site Replication feature to copy content from your staging to production server, you *must* replicate all files at one time. You cannot replicate only one site, since all sites share library files.

Best Practice for Setting up Multi-Site Folders for Site Replication

Place all sites under one master folder for your **Ektron CMS400.NET** solution. For example, if you have two secondary sites, create a the following directory structure under `\inetpub\wwwroot`.

```
Ektron (with web.config)

Ektron\Site1\bin

Ektron\Site1\App_Code

Ektron\Site1\CSSMenu

Ektron\Site1\WorkArea

Ektron\Site2\bin

Ektron\Site2\App_Code

Ektron\Site2\CSSMenu

Ektron\Site2\WorkArea

Ektron\WorkArea

Ektron\CSSMenu

Ektron\bin

Ektron\images

Ektron\HELPIMAGE

Ektron\uploadimages

Ektron\uploadedfiles
```

If you use this structure, when you perform Site Replication, you can specify one root directory for your site.

NOTE [During setup, you created virtual subdirectories for these common directories: images, HELPIMAGE, Uploadimages, Uploadedfile.](#)

Microsoft SharePoint Portal Server Integration

Before you begin using the Ektron CMS400.NET Web Parts, it is recommended that you read the following section of the documentation. It provides information about installing and configuring the Ektron CMS400.NET Web Parts, as well as overview information about Microsoft SharePoint Portal Server 2003.

Once completed, you can move on to ["Ektron CMS400.NET Web Parts" on page 502](#) for information about how to use the Ektron CMS400.NET Web Parts.

Overview

Ektron CMS400.NET can easily be integrated with Microsoft's SharePoint Portal Server. Ektron CMS400.NET's custom display functions, as well as other functions, have been configured to be used as Web Parts within the SharePoint Portal Server. By combining the simplicity of Ektron CMS400.NET and the power of Microsoft SharePoint Portal Server, users can easily access, share, and manage Ektron CMS400.NET Web site content from a single application.

This section explains how Ektron CMS400.NET easily, and seamlessly, integrates with Microsoft SharePoint Portal Server.

This chapter explains Microsoft SharePoint Portal Server Integration through the following topics.

- ["Prerequisites" on page 490](#)
- ["Configuring Your SharePoint Portal Server" on page 490](#)
- ["Microsoft SharePoint Portal Server Overview" on page 498](#)
- ["Ektron CMS400.NET Web Parts" on page 502](#)

Prerequisites

Ektron CMS400.NET Server

A server running Ektron CMS400.NET must have a directory under the root folder called `cms400Example`, which contains the necessary SharePoint Portal Server .aspx display pages. These pages are included in the .zip file that you received with the SharePoint integration files. They are commonly inserted into the following directory:

```
\CMS400.NETScripts\Portals\SharePoint2003
```

This directory is referenced by your SharePoint Portal Server's Web.config file.

NOTE

These files enable Ektron CMS400.NET's Web Parts to work.

SharePoint Portal Server

For Ektron CMS400.NET to successfully integrate with Microsoft SharePoint Portal Server, a Web server must first be set up and configured with the following applications:

- Windows 2003 Server Operating System
- Microsoft SharePoint Portal Server 2003

IMPORTANT!

SharePoint requires its own IIS site -- it cannot use the IIS site set up for Ektron CMS400.NET. This is because SharePoint alters some of the settings in the IIS site to which it is installed.

Configuring Your SharePoint Portal Server

Ektron CMS400.NET includes a separate installation program to install necessary files onto your SharePoint Portal server, as well as update necessary files.

The installation program performs many actions, including:

- Installs all Ektron CMS400.NET Web parts
- Registers Web Parts in your SharePoint Web.config file

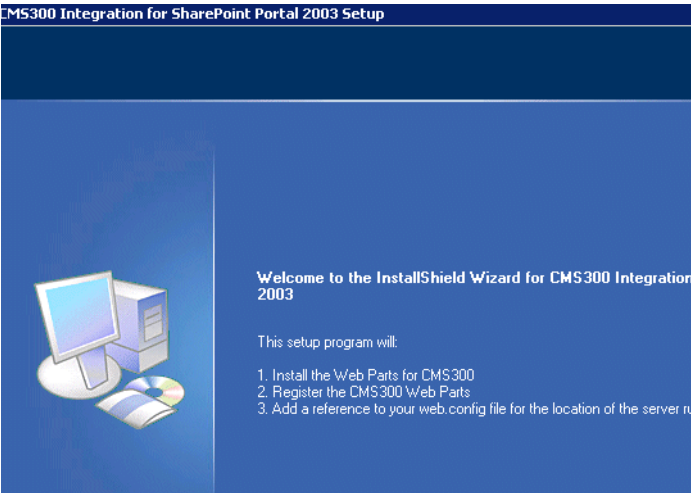
- Adds a necessary reference to your Ektron CMS400.NET Web site within your Web.config file

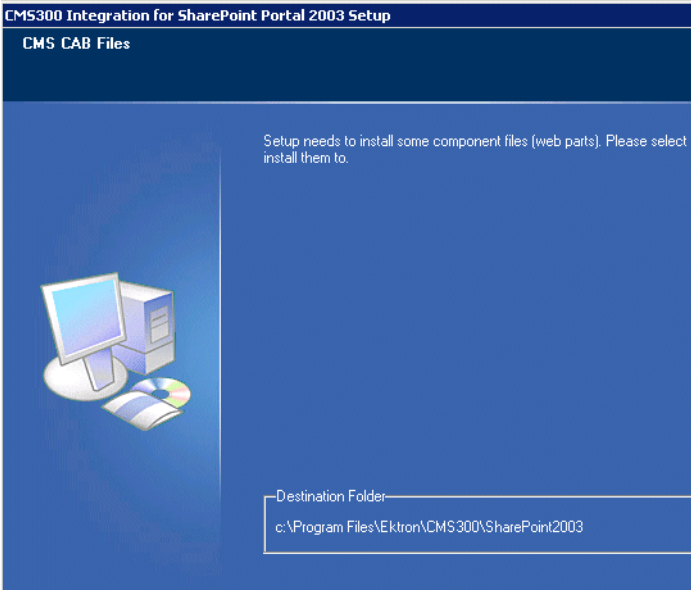
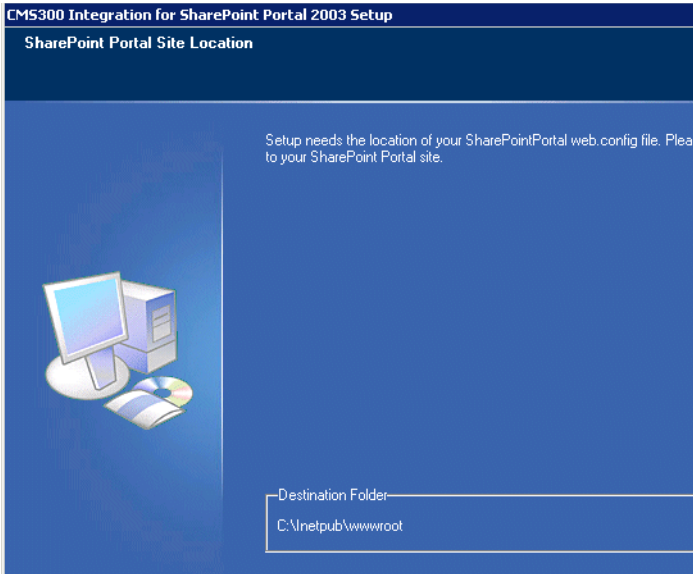
Performing the Installation

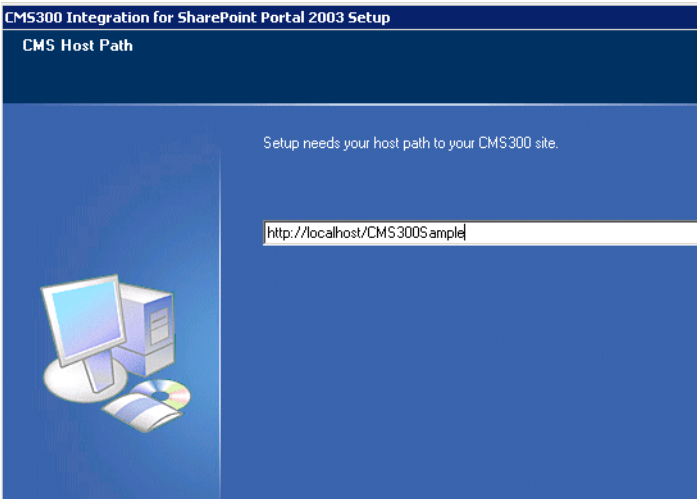
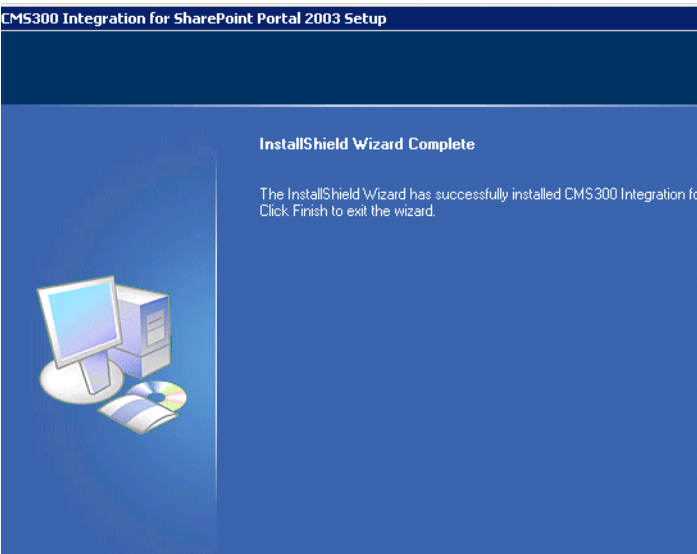
To configure your SharePoint Portal server using the Ektron CMS400.NET SharePoint integration .exe, follow these steps.

1. Move the installation file, SharePointForCMS.exe, to your SharePoint Portal Server.
2. Double-click the .exe file.
3. The installation's splash screen is displayed, and the installation begins.

The following table guides you through the rest of the installation.

Action	Setup Screen
<p>4. Click Next to proceed.</p> <p>The CMS Cab Files screen is displayed.</p>	

Action	Setup Screen
<p>5. Specify the location on your SharePoint server where you want to install the Ektron CMS400.NET Web Part CAB files.</p> <p>Click Browse to specify a directory other than the default.</p> <p>6. Click Next to proceed.</p> <p>The SharePoint Portal Site Location screen is displayed.</p>	
<p>7. Specify the root directory of your SharePoint Portal site (the directory that contains your Web.config file).</p> <p>Click Browse to specify a directory other than the default.</p> <p>8. Click Next to proceed.</p> <p>The CMS Host Path screen is displayed.</p>	

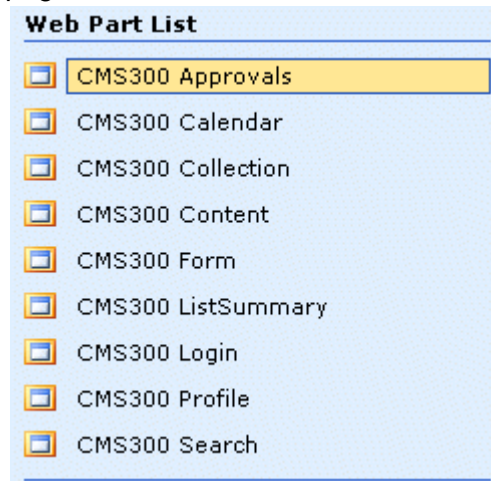
Action	Setup Screen
<p>9. Enter the fully qualified path of your Ektron CMS400.NET Web site's root directory. For example, <code>http://www.yourEktronwebsite.com/CMS400Example</code></p> <p>10. Click Next to proceed.</p> <p>The installation performs the Web Part registrations. When complete, the Installation Complete screen is displayed.</p>	
<p>11. Click Finish to exit the installation program.</p> <p>The necessary Ektron CMS400.NET integration files and settings are installed and configured on your SharePoint Portal Server.</p>	

Testing the Installation

Once the installation has been successfully completed, you can perform a simple test to be certain.

To test the installation, access your SharePoint Portal in a browser, and view your **Virtual Server Gallery**.

A list of Web Parts that were added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appear at the bottom of the page.



If the installation was not successful, see ["Installation Troubleshooting" on page 494](#).

What's Next?

Having configured the SharePoint Portal Server, you are ready to add Ektron CMS400.NET Web Parts into your portal pages. See ["Microsoft SharePoint Portal Server Overview" on page 498](#) for information about working with Ektron CMS400.NET Web Parts.

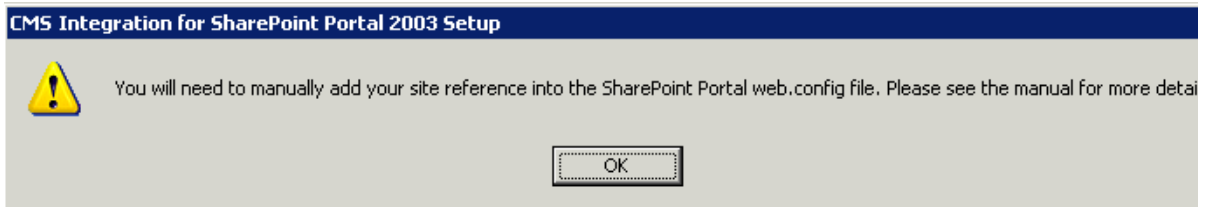
Installation Troubleshooting

During installation, you may receive messages that information you entered is not correct. If you continue the installation with incorrect data, it might be necessary to register the Ektron CMS400.NET Web Parts or update your Web.config file manually.

The following section explains solutions to problems that can occur if incorrect information was submitted during installation.

Incorrect SharePoint Portal Location

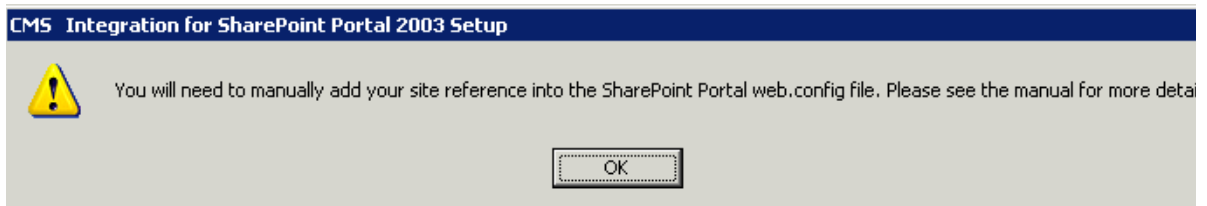
If an incorrect SharePoint Portal Server path location is given, the following message is displayed.



When the installation is complete, you must update your Web.config file manually (or perform the installation program again using the correct path). See ["Updating Web.config Manually" on page 495](#) for more information.

Incorrect Ektron CMS400.NET Host Path

If an incorrect Ektron CMS400.NET Host Path is given during installation, the following message appears.



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

See ["Updating Web.config Manually" on page 495](#) for more information.

Updating Web.config Manually

Your SharePoint Portal Server's Web.config file must contain the following Ektron CMS400.NET information for integration to work:

- Ektron CMS400.NET Web Parts as safe controls
- Ektron CMS400.NET site location

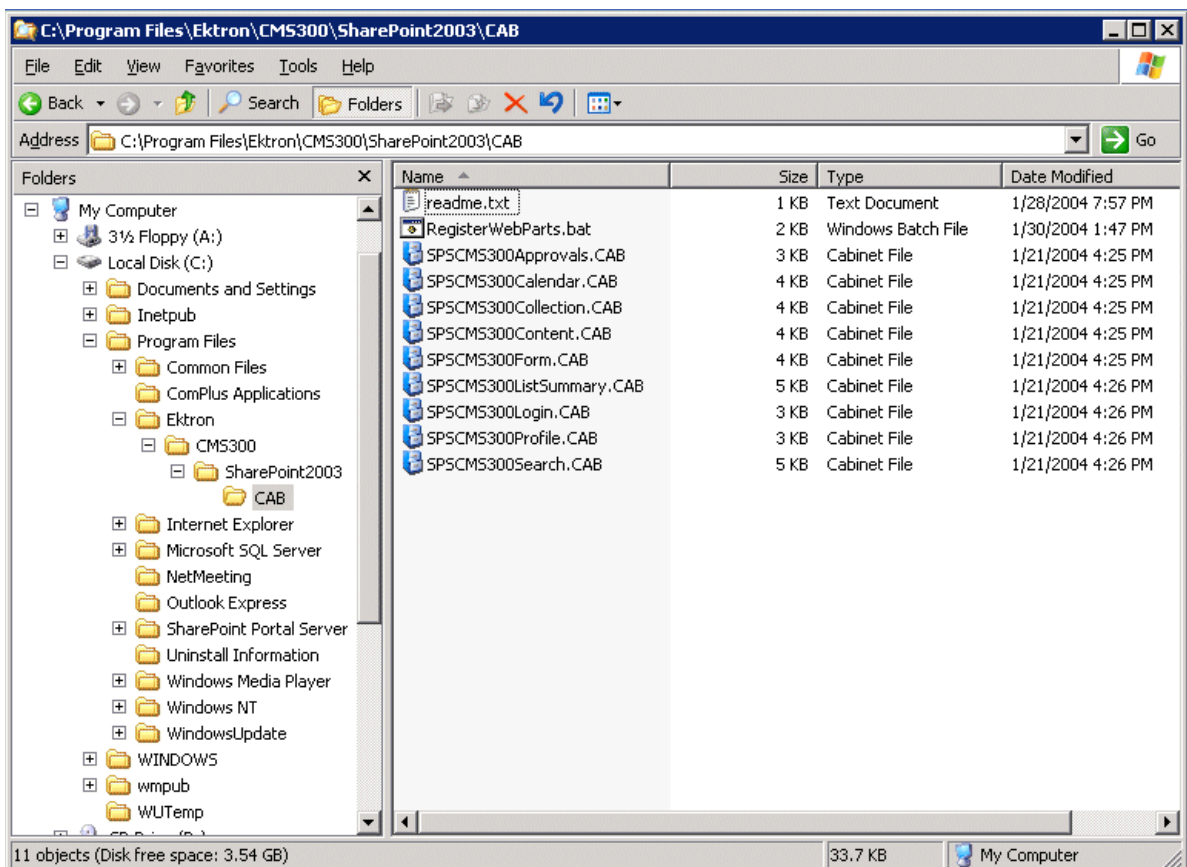
During installation, if you receive a message that you must update your Web.config file manually, the following section explains the actions that you must perform.

Registering Ektron CMS400.NET Web Parts as Safe Controls

In order for SharePoint to use Ektron CMS400.NET Web Parts, they must be registered by SharePoint as safe controls. To do that manually, follow these steps.

1. Complete the Ektron CMS400.NET SharePoint Portal Integration Installation program. This installs the files that need to be registered. See Also: ["Configuring Your SharePoint Portal Server" on page 490](#)
2. Access the directory to which you installed CMS cab files during installation.

NOTE The default location is C:\Program Files\Ektron\CMS400\SharePoint2003\CAB



3. Double-Click **RegisterWebParts.bat** to execute the batch file that registers Ektron CMS400.NET Web Parts.

NOTE

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

4. When complete, the following lines are added to your Web.config file:

```
<SafeControl Assembly="CMS400Approvals" Namespace="CMS400Approvals" TypeName="*" Safe="True"/>
<SafeControl Assembly="CMS400Calendar" Namespace="CMS400Calendar" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400Content" Namespace="CMS400Content" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400Form" Namespace="CMS400Form" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400ListSummary" Namespace="CMS400ListSummary" TypeName="*"
Safe="True" />
<SafeControl Assembly="CMS400Profile" Namespace="CMS400Profile" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400Search" Namespace="CMS400Search" TypeName="*" Safe="True" />
<SafeControl Assembly="CMS400Collection" Namespace="CMS400Collection" TypeName="*"
Safe="True"/>
<SafeControl Assembly="CMS400Login" Namespace="CMS400Login" TypeName="*" Safe="True" />
```

The Ektron CMS400.NET Web Parts are successfully registered, and your Web.config is updated with the Web Parts registered as safe controls.

Specifying Your Ektron CMS400.NET Site Path Manually

The Web.config file must contain a reference to your Ektron CMS400.NET Web site. During installation, if an incorrect path or no path was given, you need to update your Web.config file with the correct Ektron CMS400.NET's site path. To do this, follow these steps.

1. Open your SharePoint Portal Server's Web.config for editing with a text editing program such as NotePad.
2. Enter the following information within the `<configuration>` tags.

```
<appSettings>

<add key="CMS400sitelocation" value="[CMS400SitePath]" />

</appSettings>
```

Where `[CMS400SitePath]` is a fully qualified path to the directory in your Ektron CMS400.NET Web server that contains the Ektron CMS400.NET display files for SharePoint.

For example, `http://www.yourEktronwebsite.com/cms400Example/cms400scripts/portals/sharepoint2003/`

3. Save and close your Web.config file

Microsoft SharePoint Portal Server Overview

SharePoint Portal Server 2003 enables enterprises to develop an intelligent portal that seamlessly connects users, teams, and knowledge so that people can take advantage of relevant information across business processes to help them work more efficiently.

SharePoint Portal Server 2003 provides an enterprise business solution that integrates information from various systems into one solution through single sign-on and enterprise application integration capabilities, with flexible deployment options and management tools.

The portal facilitates end-to-end collaboration by enabling aggregation, organization, and search capabilities for people, teams, and information. Users can find relevant information quickly through customization and personalization of portal content and layout, as well as by audience targeting. Organizations can target information, programs, and updates to audiences based on their organizational role, team membership, interest, security group, or any other membership criteria that can be defined.

SharePoint Portal Web Page Layout

All Web pages in SharePoint have the same layout characteristics. Each Web page is comprised of the following:

- Web Part page
- Web Part zone
- Web Part

The following graphic shows the relationship of these components on a Web page in SharePoint.



What is a Web Part?

Components of a SharePoint Portal page are called Web Parts.

Microsoft defines a Web Part as:

A modular unit of information that consists of a title bar, a frame, and content. Web Parts are the basic building blocks of a Web Part Page. A Web Part is the combination of a Web Part Description file (.dwp) and a Web Part assembly file (.dll). All Web Parts are based on Web Custom Controls.

Ektron has created a Web Part for each Ektron CMS400.NET display function, as well as Web Parts for other useful Ektron CMS400.NET information.

Three Types of Web Parts

There are three types of Web Parts.

Type	Description	Available to
Shared	A Web Part added to a Web Part Page by a user who is creating or making changes to the Web Part Page in shared view	All users of a Web Part Page with appropriate permissions
Personalized	A shared Web Part with one or more property values modified by a user who has made changes to the Web Part in personal view	The user who made the changes. Other users continue to see the shared Web Part.
Private	A Web Part that a user has <ul style="list-style-type: none"> added to a Web Part Page from a Web Part gallery or <ul style="list-style-type: none"> imported from a computer while creating or making changes to the Web Part Page in personal view 	The user who added or imported the Web Part. Other users cannot see private Web Parts.

When properly configured, Ektron CMS400.NET Web Parts are shared Web Parts that can be personalized by different users (assuming they have the necessary permissions).

The type of Web Part you are working with can be important because:

- You may have permission to modify only some types of Web Parts on certain Web Part Pages, but not on other Web Part Pages
- You may be able to connect to certain types of Web Parts on a Web Part Page, but not to other types of Web Parts on the same Web Part Page

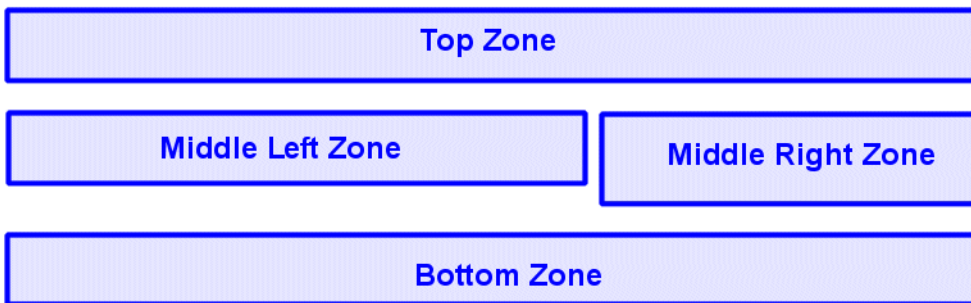
Web Part Zones

The areas, or zones, are the locations on a SharePoint Web Parts page where Web Parts can be inserted. Web Part zones can contain one or more Web Parts.

Microsoft defines a Web Part zone as:

A container with a set of properties that can be configured to control the organization and format of Web Parts on a Web Part Page. Web Part zones can also be used to provide protection against changes to Web Parts.

Although their sizes are customizable, all Web Part pages contain these four Web zones.



SharePoint Server Permissions

Regardless of other permissions, a SharePoint Portal Server user must have at least **Member** permissions to be able to insert and customize Ektron CMS400.NET Web Parts. These permissions are configured on the SharePoint server by the *SharePoint Portal Server* administrator, not the Ektron CMS400.NET administrator.

Refer to your SharePoint documentation for information about giving SharePoint users Member permissions.

Personal vs. Shared View

When adding Web Parts to a SharePoint Portal page, you may either insert them into a shared or personal Web page. The following table contrasts the views.

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

Web Page View	Description
Personal	A view of a list, SharePoint document library, or Web Part Page that is available only to a particular user. The personal view of a Web Part Page uses a combination of shared property values and personalized property values. Changes made to a personal view apply only to the list, library, or page in that view and are therefore visible to that user only.

Keep this information in mind when inserting Web Parts.

Toggling Between Shared and Personal View

When logged in and in Edit Page mode, you can toggle between shared view and personal view by following these steps.

1. Click **Modify Shared Page** or **Modify My Page** (depending on your current settings).
2. A sub menu is displayed.
3. Click **Shared View** or **Personal View** to display the respective view.
4. The page refreshes, and the change is reflected.
5. Repeat this process to return to the previous view.

Ektron CMS400.NET Web Parts

When configured properly, all Ektron CMS400.NET Web Parts are available to be inserted by browsing to the SharePoint Portal **Virtual Server Gallery**.

See Also:

- ["Inserting Ektron CMS400.NET Web Parts" on page 503](#)
- ["Modifying Web Parts" on page 505](#)
- ["Managing Ektron CMS400.NET Web Parts" on page 506](#)

Inserting Ektron CMS400.NET Web Parts


This section explains the basics behind inserting Ektron CMS400.NET Web Parts.

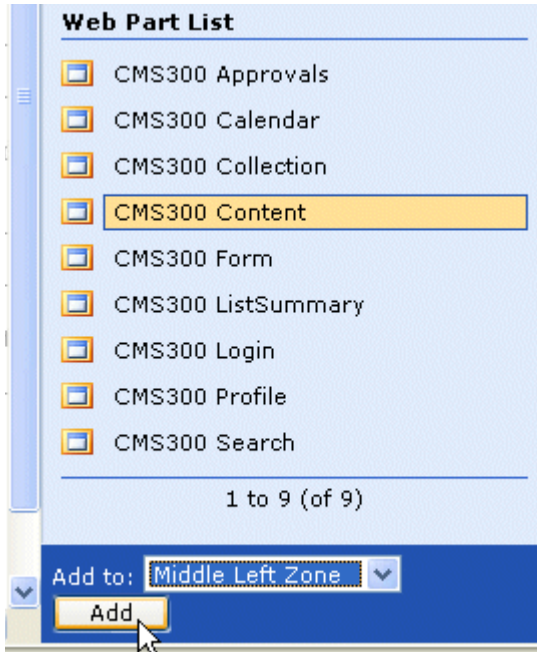
1. Log in to SharePoint Portal Server.
2. Create or navigate to the Web Part zone into which you want to insert an Ektron CMS400.NET Web Part.
3. Click **Edit Page** at the bottom of the left navigation menu.
4. You are in Edit Page Mode.
5. Click **Modify Shared Page, Add Web Parts**, then **Browse**.
6. The Web Part zones are displayed, and the Add Web Parts menu appears on the right side of the screen.
7. Click **Virtual Server Gallery**.
8. A list of all Web Parts that have been added to the Virtual Server Gallery, including the Ektron CMS400.NET Web Parts, appears at the bottom of the page

NOTE

For information about Ektron CMS400.NET Web Parts, see "Managing Ektron CMS400.NET Web Parts" on page 506.

9. Insert an Ektron CMS400.NET Web Part one of two ways:

Method	Screen
Drag and drop the Web Part to the desired zone	 <p>The screenshot shows the 'Edit Page' interface with several web part zones: 'Top Zone', 'Middle Left Zone', and 'Bottom Zone'. A 'CMS300 Content' web part is being dragged from the 'Virtual Server Gallery' on the right into the 'Middle Left Zone'. The gallery lists various web parts, with 'CMS300 Content' highlighted. The interface includes a 'SharepointMain Ga' header and a 'Web Part List' section.</p>

Method	Screen
<ol style="list-style-type: none">1. Click a Web Part.2. Choose the location at the bottom of the page.3. Click Add.	 <p>The screenshot displays the 'Web Part List' interface. It features a list of web parts with 'CMS300 Content' selected. Below the list, the 'Add to' dropdown menu is open, showing 'Middle Left Zone' as the selected location. The 'Add' button is highlighted with a mouse cursor.</p>

The selected Web Part is added to the selected zone.



- Continue to insert all desired Web Parts onto your shared or personal Web page.

Modifying Web Parts

All Web Parts have three properties that you can modify.

Property	Lets you
Appearance	Adjust appearance settings such as height, width, and title.
Layout	Adjust location, order, and other layout information.
Advanced	Set advanced options.

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

Some Ektron CMS400.NET Web Parts have additional configuration settings.

Modifying a Web Part

To modify a Web Part that has been inserted into a Web Part zone, follow these steps.

1. Log into your SharePoint Portal Server.
2. Navigate to a Web Part zone that contains an Ektron CMS400.NET Web Part that you want to modify.
3. Click **Edit Page** at the bottom of the left navigation menu.
4. You are in Edit Page Mode.
5. Click the Down Arrow (▼) at the top right corner of the Web Part you want to modify.
6. The Web Part Menu is displayed.
7. Click **Modify Shared Web Part**.
8. The Web Part is surrounded by a yellow dashed border, and the modify Web Part menu appears on the right side of the screen.
9. Modify the Web Part.

NOTE

Information about modifying Ektron CMS400.NET Web Parts can be found in ["Managing Ektron CMS400.NET Web Parts" on page 506](#).

10. Click **Apply** for the changes to take effect without closing the menu. Or, click **OK** to save and close the menu.

Managing Ektron CMS400.NET Web Parts

Ektron created Web Parts for all display functions in Ektron CMS400.NET, as well as two others. The following table lists each Web Part and its functionality.

Web Part	Displays	More Information
Approvals	A list of content awaiting approval by the logged in Ektron CMS400.NET user.	"Approvals Web Part" on page 507
Calendar	A calendar created for the Ektron CMS400.NET Web site.	"Calendar Web Part" on page 508
Collection	A collection, as well as its display function, for a collection created in the Ektron CMS400.NET Web site.	"Collection Web Part" on page 510

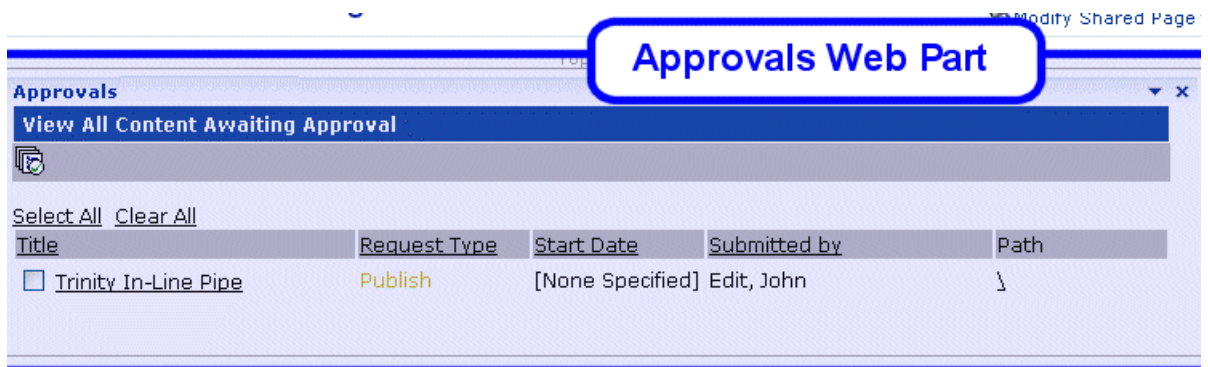
Web Part	Displays	More Information
Content	Content created for the Ektron CMS400.NET Web site.	"Content Web Part" on page 512
Form	A form content item created for the Ektron CMS400.NET Web site.	"Form Content Web Part" on page 514
Summary List	A summary list for a specified content folder in the Ektron CMS400.NET Web site.	"Summary List Web Part" on page 517
Login	A login button which allows users to log in, and be authorized, by the Ektron CMS400.NET Web site.	"Login Web Part" on page 521
Profile	Configurable profile settings for the logged in Ektron CMS400.NET user.	"Profile Web Part" on page 522
Search	Ektron CMS400.NET Web site search box and search results.	"Search Web Part" on page 524

Approvals Web Part

When logged into Ektron CMS400.NET via Microsoft SharePoint Portal Server, the approvals Web page displays a list of content awaiting your approval.

NOTE See "Login Web Part" on page 521 for additional information.

Here is an example of the approvals Web Part displayed in SharePoint Server.



The approvals Web Part is identical to the approvals report page within the Ektron CMS400.NET Workarea.

Approvals Web Part Settings

The Approvals Web Part includes no additional settings.

Approving Content via SharePoint

After viewing approvals, you can approve any content as you would in the Ektron CMS400.NET Web site.

Calendar Web Part

The calendar Web Part displays an event calendar created within the Ektron CMS400.NET Web site. Here is an example of a calendar Web Part displayed in the SharePoint Portal Server.



In addition to displaying the event calendar, if you are logged into the Ektron CMS400.NET Web site via SharePoint Portal Server, you can add and manage calendar events (assuming you have permissions to do so).

NOTE

See "Login Web Part" on page 521 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Calendar Web Part Settings

The calendar Web Part can be configured to display any event calendar from your Ektron CMS400.NET Web site. To configure the calendar Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the calendar Web Part, as described in ["Modifying Web Parts" on page 505](#).
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Calendar settings**.
3. The Calendar Web Part Settings page is displayed.
4. Change the value in the **CalendarID** field to the ID number of the event calendar you want to be displayed.
5. Click **Apply** for the changes to take effect without closing the menu.
6. The screen is refreshed with the updated calendar displayed.
7. Make additional changes to the Calendar Web Part. Or, click **OK** to close the Modify Web Part area.

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

Managing Calendars and Calendar Events

When you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can manage your calendars and calendar events. Actions that you can perform from the SharePoint server include

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

as well as other actions.

Collection Web Part

The collection Web Part displays a collection that has been created in your Ektron CMS400.NET Web site. Here is an example of a collection Web Part displayed in the SharePoint Portal Server.



In addition to displaying the collection in the portal, if you are logged into the Ektron CMS400.NET Web site via SharePoint, you can perform all actions related to collections.

NOTE

See ["Login Web Part" on page 521](#) for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Collection Web Part Settings

After a collection Web Part is added to the portal, you may configure it to display any collection on your Web site, as well as specify the display function you want to apply to it. To configure the collection Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the collection Web Part as described in ["Modifying Web Parts" on page 505](#).
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Content settings**.
3. The Collection Web Part Settings information is displayed.

4. Make the necessary changes to the available fields using the following table as a reference.

Field	Description
CollectionID	The ID of the collection you want to display in the portal.
Collection Display Function	<p>The name of the display function you want to apply to the collection.</p> <hr/> <p>Contact your Ektron CMS400.NET Web site developer for a list of available display functions.</p> <hr/>

5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated collection displayed.
7. Make additional changes to the collection Web Part, or click the **OK** button to close the Modify Web Part area.

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

Managing Ektron CMS400.NET Content

When logged into the Ektron CMS400.NET Web site via SharePoint, you may perform any action on the collection, assuming you have the proper permissions. Some collection-related actions you may perform include

- Adding new content to the collection
- Re-ordering items in the collection
- Removing items from the collection
- Editing collection information

To manage the Ektron CMS400.NET Web site collection within SharePoint, follow these steps.

1. Log In to the Ektron CMS400.NET Web site via the Login Web Part (see "[Login Web Part](#)" on page 521 for more information).

NOTE

[If the collection Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone in which the content Web Part is located.](#)

- The collection displayed by the collection Web Part is surrounded by a colored border.

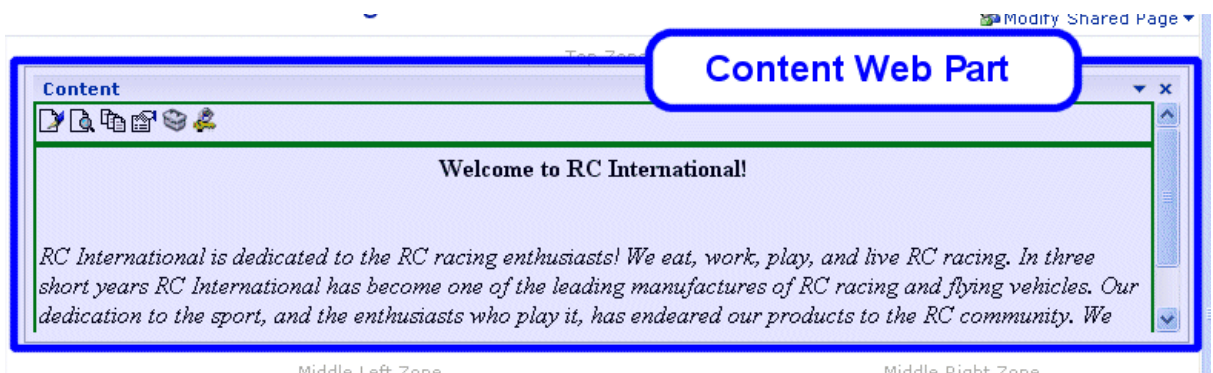


- Perform actions by using the floating toolbar, or by clicking on the Workarea button to access the Ektron CMS400.NET Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET collections.

Content Web Part

The content Web Part is used to display any content created in the Ektron CMS400.NET Web site. Here is an example of one displayed in the SharePoint Portal Server.



If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the content (see

"Managing Ektron CMS400.NET Content" on page 513 for more information).

NOTE

See "Login Web Part" on page 521 for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Content Web Part Settings

The content Web Part can be configured to display any content from your Ektron CMS400.NET Web site. To do so, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in "[Modifying Web Parts](#)" on page 505.
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Content settings**.
3. The Content Web Part Settings page is displayed.
4. Change the value in the **ContentID** field to the ID number of the content you want to be displayed.
5. Click the **Apply** button for the changes to take effect.
6. The screen is refreshed with the updated content displayed.
7. Make additional changes to the Content Web Part, or click **OK** to close the Modify Web Part area.

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

Managing Ektron CMS400.NET Content

As stated earlier, when logged into the Ektron CMS400.NET Web site via SharePoint, you may manage content displayed by the content Web Part (assuming you have permissions to do so within the Ektron CMS400.NET Web site).

Content-related actions you may perform include:

- Editing existing content, summaries, and metadata
- Creating new content
- Deleting content
- Viewing historical versions of content and restoring them
- Managing collections

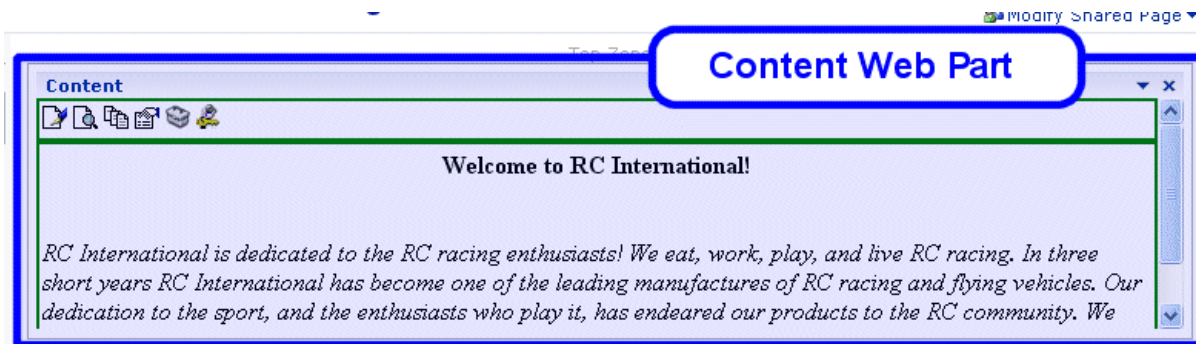
To manage the Ektron CMS400.NET Web site content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "Login Web Part" on page 521 for more information).

NOTE

If the content Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone the content Web Part is in.

2. The content displayed by the content Web Part is surrounded by a colored border.



3. Perform actions by using the floating toolbar, or by clicking the Workarea button to access your Ektron CMS400.NET Workarea.

As you can see, Microsoft SharePoint Portal Server can be your single location for managing Ektron CMS400.NET content.

Form Content Web Part

A form content Web Part is used to display Ektron CMS400.NET form content.

Here is an example of form content displayed in SharePoint as a Web Part.

The screenshot shows a SharePoint interface with a blue header bar. The page title is 'SharepointMain' and the breadcrumb is 'Edit: Ektron Integration'. A blue box highlights a 'Form Content Block Web Part' which contains a form titled 'Form'. The form has the following fields: 'First Name:' with a text input, 'Last Name:' with a text input, 'Email:' with a text input, 'Ektron Product:' with a dropdown menu showing 'CMS300', and 'Comments:' with a large text area. The form is set against a light blue background with a green border. The page layout includes a 'Top Zone' at the top, a 'Middle Left Zone' on the left, and a 'Middle Right Zone' on the right.

If you are logged into the Ektron CMS400.NET Web site via SharePoint server, you may also manage the form content (see ["Managing Ektron CMS400.NET Form Content" on page 516](#) for more information).

NOTE

See ["Login Web Part" on page 521](#) for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

Form Content Web Part Settings

The form content Web Part can be configured to display any form content from your Ektron CMS400.NET Web site. To configure one, follow these steps.

1. Access the Modify Shared Web Part area for the form content Web Part, as described in ["Modifying Web Parts" on page 505](#).
2. Minimize the **Appearance Settings**, and expand the **CMS400.NET Form Content settings**
3. The Form Content Web Part Settings information is displayed.
4. In the **Form Block ID** field, enter the ID number of the form content you want to display.
5. Click the **Apply** button for the changes to take effect.

The screen is refreshed with the updated content displayed.

6. Make additional changes to the Form Content Web Part, or click the **OK** button to close the Modify Web Part area.

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

Managing Ektron CMS400.NET Form Content

When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage form content displayed by the form content Web Part (assuming you have permissions to do so within Ektron CMS400.NET).

Some form content related actions that you may perform include

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

To manage the Ektron CMS400.NET Web site form content within SharePoint, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "[Login Web Part](#)" on page 521 for more information).

NOTE

If the form content Web Part is in a different zone than the login Web Part, it may be necessary to refresh the zone that includes the form Web Part.

-
2. The form content displayed by the form content Web Part is surrounded by a colored border.

The screenshot shows a SharePoint web page with a form titled "Edit: Ektron Integration". The form is enclosed in a blue border. A callout box with a blue border and white background points to the form, containing the text "Form Content Block Web Part". The form itself has a title bar "Form" and a toolbar with icons for save, delete, and other actions. The form fields are:

- First Name:
- Last Name:
- Email:
- Ektron Product: CMS
- Comments:

The form is positioned in the "Middle Left Zone" of the page layout.

-
-
3. Perform actions by using the floating toolbar, or by clicking on the Workarea button to access your Ektron CMS400.NET Workarea.

Summary List Web Part

The summary list, or list summary, Web Part displays a list of summaries for some, or all, content in a specified Ektron CMS400.NET content folder.

Here is an example of a summary list Web Part being displayed in the SharePoint Portal Server.



If you are logged into the Ektron CMS400.NET Web site via SharePoint Server, you can also manage the summary list (see ["Managing the Summary List" on page 520](#) for more information).

NOTE See ["Login Web Part" on page 521](#) for information about adding a login Web Part and logging into the Ektron CMS400.NET Web site via SharePoint Server.

List Summary Web Part Settings

The list summary Web Part can be configured to fully customize the summary list. Several options are configurable including:

- Starting folder
- Style information
- Maximum amount to display

To configure the list summary Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in ["Modifying Web Parts" on page 505](#).

2. Minimize the **Appearance Settings**, and expand the **CMS400.NET ListSummary settings**.
3. The List Summary Web Part Settings screen is displayed.
4. Make the necessary changes to the List Summary settings using the following table as a guide.

Field	Description	Default
Starting Folder	Ektron CMS400.NET content folder from which the summary list begins to retrieve summary information. Examples: \Products\RC Cars or \ (root content folder)	\
Recursive	Specifies whether the summary list includes information from the starting folder's subfolders. <ul style="list-style-type: none"> • No - summary list is not recursive • Yes - summary list is recursive 	No
Show Summary	Used to specify if the summaries for the content in summary list are displayed. <ul style="list-style-type: none"> • No - summaries are not displayed • Yes - summaries are displayed 	No
Style Information	Insert an inline style that is applied to the hyperlinks generated by the summary list. Example: backgroundcolor:#cccccc; border:solid blue 1pt;	
Order By	Choose how you want to order the summary list by. <ul style="list-style-type: none"> • Title - title of the content • DateModified - date the content was last modified • DateCreated - date the content was created • AuthorFname - first name of the last editor • AuthorLname - last name of the last editor 	Title
Order By Asc/Desc	Choose how to sort the summary list. <ul style="list-style-type: none"> • Asc - ascending order (A > Z) • Desc - descending order (Z > A) 	Asc

Field	Description	Default
Show Info	<p>Additional information to display in the summary list.</p> <ul style="list-style-type: none"> • None - no additional information • DateModified - date and time content was last modified • DateCreated - date and time content was created • AuthorFname - first name of the last editor • AuthorLname - last name of the last editor 	None
Maximum Number	<p>Specify the maximum number of results you want to display.</p> <p><u>Note: Enter zero (0) to display unlimited, or all, results.</u></p>	0 (unlimited)

5. Click the **Apply** button for the changes to take effect.
 6. The screen is refreshed with the updated summary list is displayed.
 7. Make additional changes to the List Summary Web Part, or click the **OK** button to close the Modify Web Part area.
- Clicking **OK** returns you to the Edit Page view.

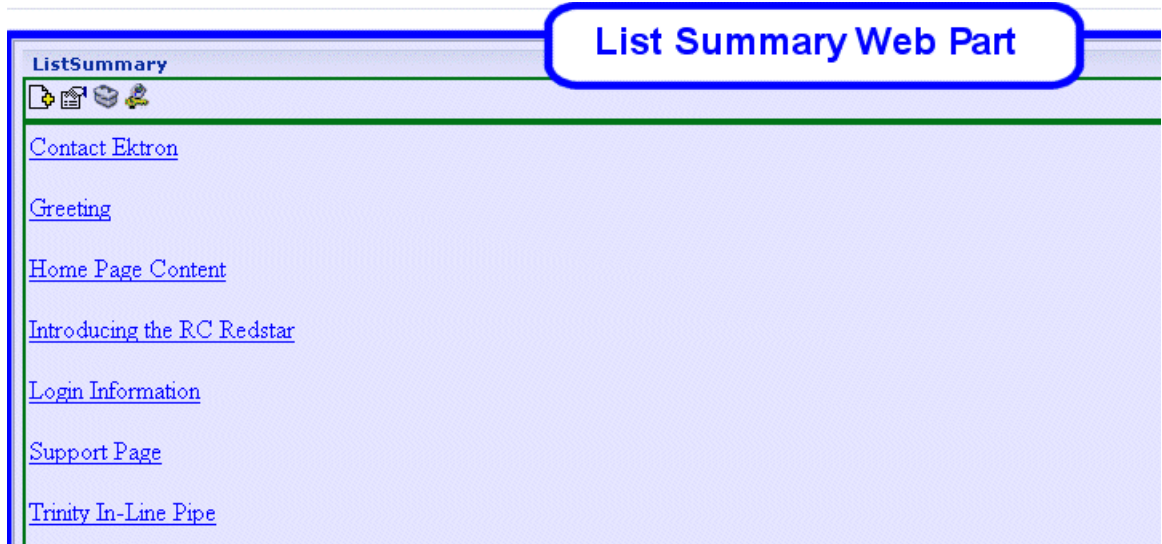
Managing the Summary List

When logged into the Ektron CMS400.NET Web site via SharePoint, you may manage the summary list displayed by the list summary Web Part. To do so, follow these steps.

1. Log in to the Ektron CMS400.NET Web site via the Login Web Part (see "[Login Web Part](#)" on page 521 for more information).

NOTE If the summary list Web Part is in a different zone than the login Web Part, it may be necessary to refresh the summary list Web Part's zone.

- The summary list displayed by the summary list Web Part is surrounded by a colored border.

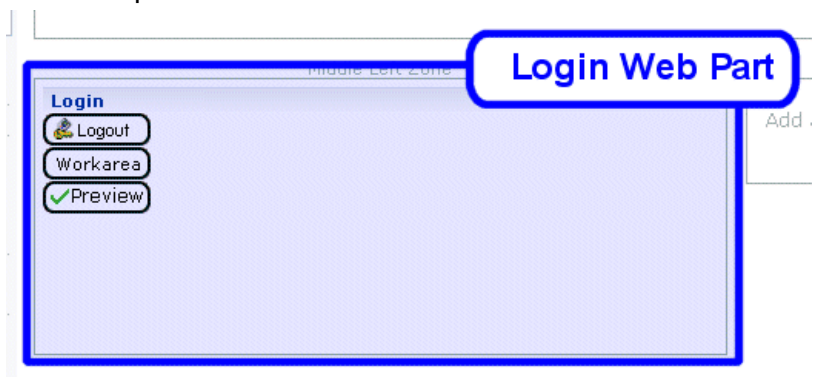


- Perform actions by using the floating toolbar, or by clicking the Workarea button to access the Ektron CMS400.NET Workarea.

Login Web Part

The Login Web Part displays a login button that lets users log in to the Ektron CMS400.NET Web site via SharePoint, and be authorized to work with Ektron CMS400.NET related content.

Here is an example of the login Web Part displayed in the SharePoint portal server.



In this example, the **Logout**, **Workarea**, and **Preview** buttons are displayed because we are currently logged in. If we were not logged in, only **Login** would appear.

Login Web Part Settings

The login Web Part includes no configurable settings.

Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server

You can log in to your Ektron CMS400.NET Web site via SharePoint Portal Server and be authorized to manage content, as well as perform any other action. To log in to your Ektron CMS400.NET Web site via SharePoint Portal Server, follow these steps.

1. Navigate to the SharePoint Zone that contains the Ektron CMS400.NET Login Web Part.
2. Click the **Login** button.
3. The Ektron CMS400.NET Login box appears.
4. Enter a valid Ektron CMS400.NET username and password.
5. Click the **Login** button.
6. The username and password are sent to the Ektron CMS400.NET server. Upon successful authorization, you are logged in to Ektron CMS400.NET.

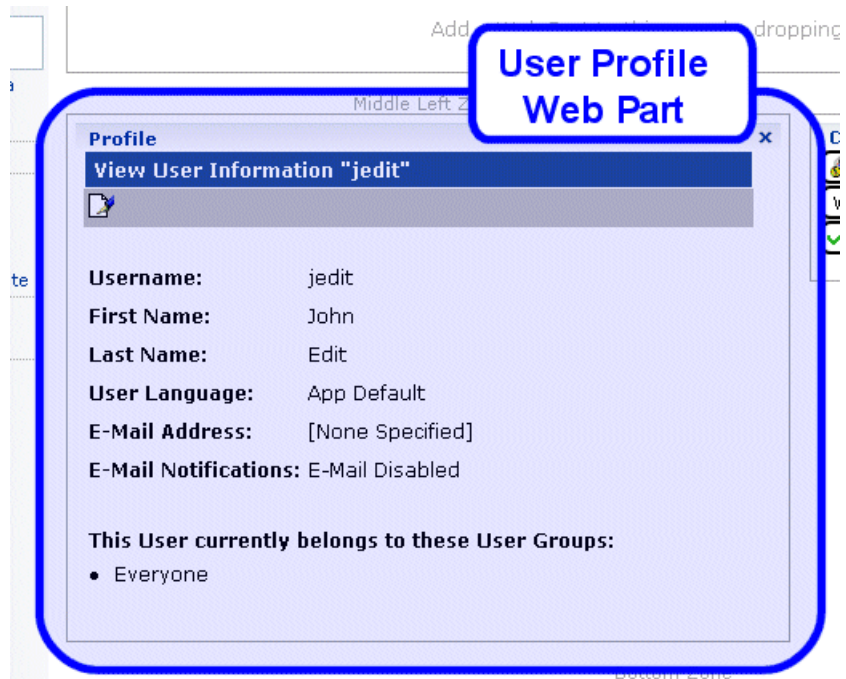
NOTE [Logging in via SharePoint does not refresh the entire screen. Instead, only the zone that includes the login Web Part appears to be logged into. Refresh each zone, or the entire screen, for the changes to take effect.](#)

Profile Web Part

Every user of an Ektron CMS400.NET Web site has access to their user profile, which allows them to view and modify information about themselves. When logged into Ektron CMS400.NET via SharePoint, each user can access his profile information.

NOTE [See "Login Web Part" on page 521 for additional information about logging in.](#)

Here is the profile Web Part displayed in the SharePoint portal server, logged in as the user **John Edit**.



Although you cannot modify the profile Web Part, you can update your Ektron CMS400.NET user profile information (see ["Editing Profile Information" on page 523](#) for additional information).

Profile Web Part Settings

The profile Web Part includes no configurable settings.

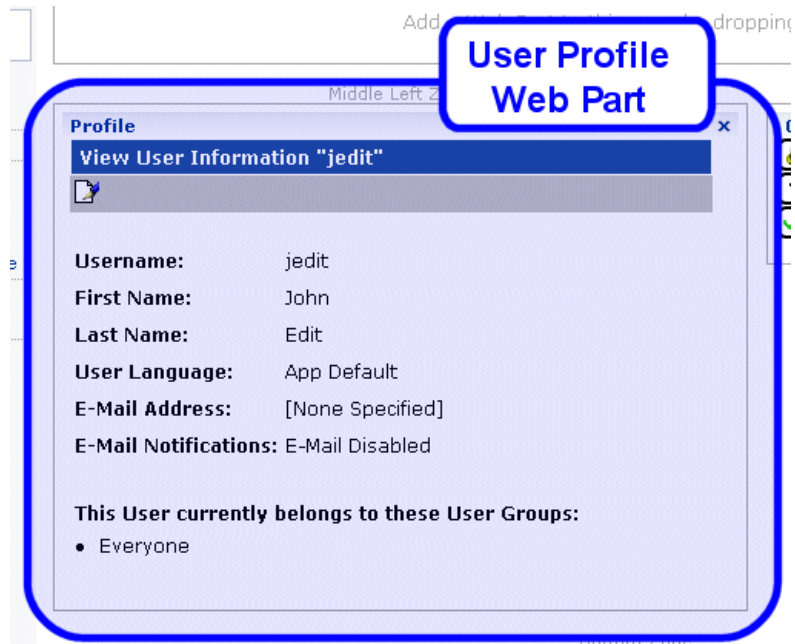
Editing Profile Information



All Ektron CMS400.NET users can update their profile information directly from SharePoint. To update Ektron CMS400.NET profile information, follow these steps.

NOTE

Before updating profile information, you must be logged in to your Ektron CMS400.NET Web site via SharePoint. See ["Logging Into a Ektron CMS400.NET Web Site Via SharePoint Server" on page 522](#) for more information.

1. Access the SharePoint portal page that contains the Ektron CMS400.NET profile Web Part.



2. Click the Edit button ().
3. The Edit User Information screen is displayed.
4. Change your user information.
5. Click the Update button () to save the changes.
6. The Web Part is refreshed, and the view user information screen is displayed with the updated information.

Search Web Part

The search Web Part lets you insert a search text box and search button that search your Ektron CMS400.NET Web site from SharePoint.

Here is an example of a search Web Part inserted into a SharePoint portal server screen.



When visitors to the SharePoint portal page access this search Web Part, they can perform a search on your Ektron CMS400.NET Web site.

Search Web Part Settings

You can configure the search Web Part to fully customize how the search is displayed in the portal, as well as the search's functionality. Several options are configurable, including:

- Starting folder
- Recursive search
- Maximum amount of results to display

To configure the search Web Part, follow these steps.

1. Access the Modify Shared Web Part area for the content Web Part, as described in ["Modifying Web Parts" on page 505](#).
2. Minimize the **Appearance Settings** and expand the **CMS400.NET Search settings**.
3. The Search Web Part Settings screen is displayed.

4. Make the necessary changes to the search settings using the following table as a guide.

Field	Description	Default
Starting Folder	Ektron CMS400.NET content folder where the search begins to retrieve results from. Example: \Products\RC Cars or \ (root content folder)	\
Recursive	Specifies whether the search looks through the starting folder and its subfolders <i>or</i> the starting folder only <ul style="list-style-type: none"> • No - search only the starting folder • Yes - search starting folder and its subfolders 	No
Target Page	The Web page that displays the search results.	search-display.aspx
Text Box Size	The size of the search text box when displayed.	25
Maximum Characters	The maximum number of characters the search text box accepts.	200
Button Text	The text displayed on the search button.	Search
Font Face	The font style of the search box options.	Verdana
Font Color	The font color of the search box options.	#808080
Font Size	The font size of the search box options.	2
Horizontal	The orientation of the search text box and options. <ul style="list-style-type: none"> • No - search options align vertically • Yes - search options align horizontally 	No
Return: Maximum Results	Determines the maximum number of search results displayed. <u>Note: Enter zero (0) to display unlimited, or all, results.</u>	0
Return: Style Info	An inline style applied to search result hyperlinks. For example: background-color:#cccccc; border:solid blue 1pt;	
Return: Show Date	Specify whether the search results will display the date and time they were last edited.	No

5. Click the **Apply** button.
6. The screen is refreshed, and the updated search Web Part is displayed.
7. Make additional changes to the search Web Part, or click the **OK** button to close the Modify Web Part area.
Clicking **OK** returns you to the Edit Page view.

Performing a Search

When the search Web Part is inserted into your SharePoint Portal page, you can perform a search. To do so, follow these steps:

1. Access the SharePoint portal page that contains the Ektron CMS400.NET search Web Part.



2. Enter search criteria in the search text box.
3. Click **Search**.
4. The search is performed, and all content in your Ektron CMS400.NET Web site that matches the criteria appears.

Site Replication

NOTE

Ektron CMS400.NET's Site Replication software is an extra cost option. Please contact your Ektron Sales representative for details on purchasing it.

Site Replication is an automated, one-way site synchronization between a staging or test server and a production server. It lets you perfect the changes on the staging server, then effortlessly copy them to the production server. In this way, your production server can easily be kept up to date, while at the same time be spared simple errors that typically accompany last-minute changes.

(Synchronization differs from copying in that it only copies files that are new or have changed. Since many files on both servers are typically the same, synchronization is faster than copying.)

Whether you've been testing a new site template or an upgraded version of CMS400.NET, Site Replication automatically pushes the new features of your site to the production server. Site Replication is especially useful when your site contains sensitive information (for example, pricing) that needs to be carefully reviewed for quality assurance before it goes live.

Before the latest data is copied to the production server, it is backed up. So, you can restore the production server to an earlier version if you ever need to.

Site Replication is explained through the following subtopics.

- ["Site Replication vs. the Move Site Procedure" on page 529](#)
- ["Site Replication Overview" on page 529](#)
- ["What Information is Synchronized" on page 530](#)
- ["What Information is Not Synchronized" on page 530](#)
- ["Possible Site Replication Configurations" on page 531](#)
- ["Prerequisites" on page 532](#)
- ["Installing the Site Replication Utility" on page 534](#)

- "Configuring the Site Replication Utility" on page 551
- "Previewing the Site Replication Process" on page 561
- "Performing Site Replication" on page 562
- "Viewing and Restoring a Backup of the Production Server" on page 564
- "Replicating to Multiple Sites" on page 565
- "Supporting Several Sites on One Staging Server" on page 566

Site Replication vs. the Move Site Procedure

The **Ektron CMS400.NET** Setup Manual section "Installing Ektron CMS400.NET" > "Moving a Site to Another Directory or Server" describes a procedure for moving an **eWebEditPro+XML** Web site to a new folder or even a different server. You would use that procedure under the following circumstances:

- The initial move of a site up to a shared server (or any other server on which you cannot run the .exe installer). Subsequently, you would use the Site Replication feature.
- Moving a site to a new server. For example, you purchase a new server to replace your existing one.
- Moving a site between two servers that are not connected by a network.

Site Replication Overview

First, you install Site Replication software onto both servers. Next, you supply configuration information for each server, such as the site directory and when replication begins.

After you install and configure the Site Replication software, you can begin using it to synchronize the test server with the production server. Before initiating the synchronization, a **Preview** button displays the changes that will occur. Once you are ready, you can begin the synchronization. During the procedure, a screen displays its real-time progress.

When synchronization is complete, you can view a log of changes made. If you decide the update should not have occurred, you can restore the receiving server.

NOTE You should verify that adequate space is available for the Site Replication. The data directories are backed up before the Site Replication begins. The previous version remains, creating a `sitereplication.backup/.dirbackup date time` file. A new copy of the data directories is placed in the same folder and is named `dirupdates date time`.

What Information is Synchronized

Synchronized information includes:

- CMS400.NET code (the CMS400Scripts directory)
- CMS400.NET database schema changes
- CMS400.NET database content
- Document Management Functionality code (the AssetManagement directory)
- Document Management Functionality database
- templates (ASPX, ASP, PHP, JSP)
- library content (uploadedfiles and uploadedimages folders)
- CMS400.NET web.config file
- user list - However, when the user list is copied to the production server, non-administrative users' permission to add content is removed.

NOTE If users edit content on a production server, the same changes must be made to the staging server. Alternatively, users can edit on the staging server, and you can perform another replication.

What Information is Not Synchronized

Because they contain site-specific information, the following files are not synchronized during Site Replication:

- Membership users (See Also: ["Updating Membership Users" on page 549](#))

- CMS400.NET form data tables - used to hold form submissions from a Web site. Also, any tasks that track form data.
- Web.config (needs to be updated manually only when upgrading)
- AssetManagement.config (needs to be updated manually only when upgrading if receiving server has Document Management Functionality)
- AssetManagementData.config (needs to be updated manually only when upgrading if receiving server has Document Management Functionality)
- The most recent searches table, use to generate the Search Phrase Report
- Optionally, a list of tables on the production machine. (See [Also: "Preserving Database Tables" on page 550](#))

Possible Site Replication Configurations

The following configurations are supported during Site Replication:

- CMS400.NET site and database on same server
- CMS400.NET site and database on separate servers
- CMS400.NET and Document Management Functionality on same server

IMPORTANT!

If you are performing a Site Replication of CMS400.NET and Document Management on the same server, the `\AssetManagement\` folder must be a subfolder of the CMS root directory. For example, `c:\inetpub\wwwroot\CMS400example\`.

- CMS400.NET and Document Management Functionality on separate servers

For the last item on the list, you need to run Site Replication utility twice: once for the Ektron CMS400.NET server, and once for the Document Management server.

The rest of this chapter explains the Site Replication utility through the following topics.

- ["Installing the Site Replication Utility" on page 534](#)

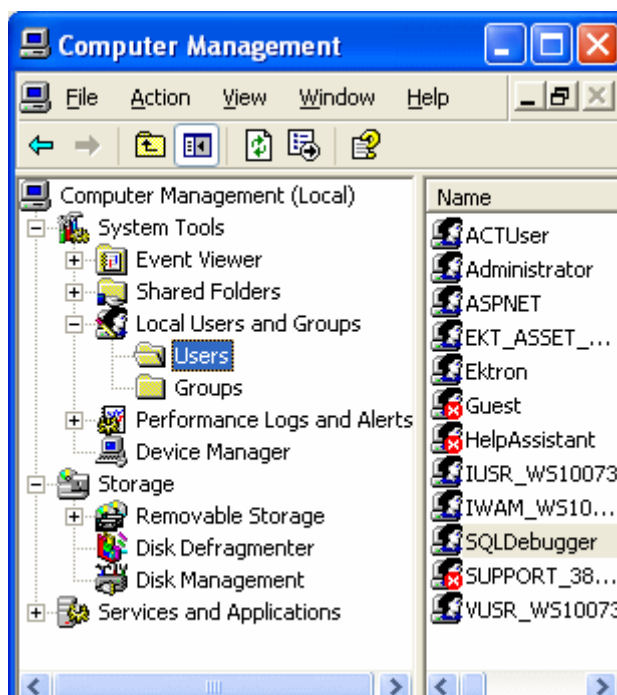
- "Configuring the Site Replication Utility" on page 551
- "Previewing the Site Replication Process" on page 561
- "Performing Site Replication" on page 562
- "Viewing and Restoring a Backup of the Production Server" on page 564

Prerequisites

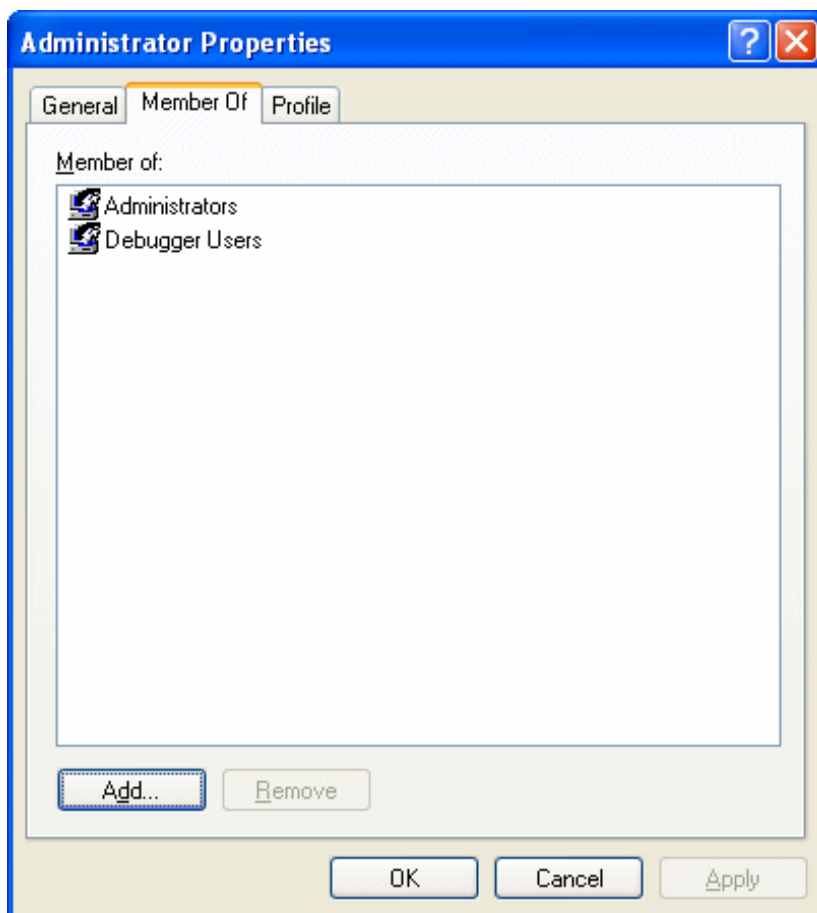
Every user who will use Site Replication must be a member of the Administrators group within Windows' Microsoft Management Console.

To apply this setting to a user, follow these steps.

1. Click **Start > Control Panel > Administrative Tools > Computer Management**.
2. Click **Local Users and Groups** then the **Users** folder.



3. If the user does not appear in the right frame, right click the mouse and select **New User...** Then complete the dialog.
4. Right mouse click on the user and select **Properties**.
5. Click the **Member of** tab.

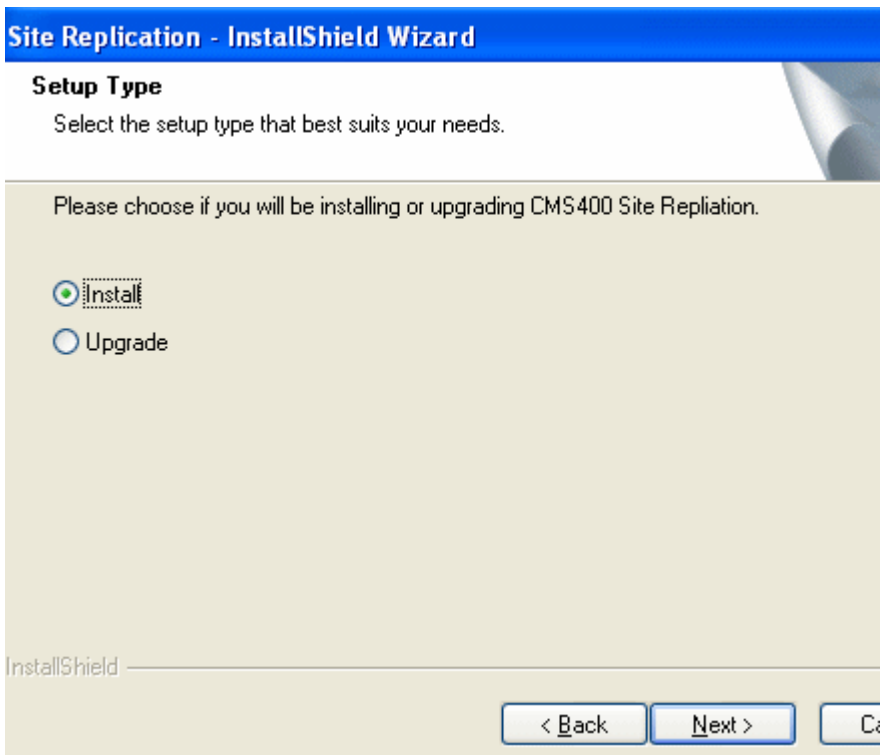


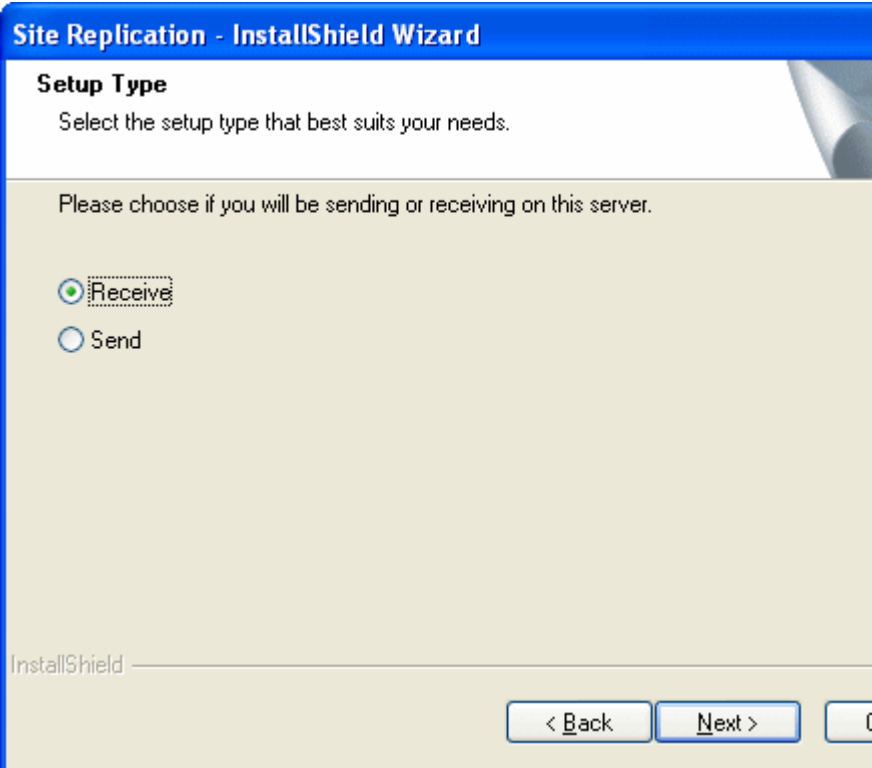
6. If you do not see **Administrators** in the **Member of** window, click the **Add** button.
7. In the **Enter the object names to select** field, enter **Administrators**.
8. Click **OK** twice.

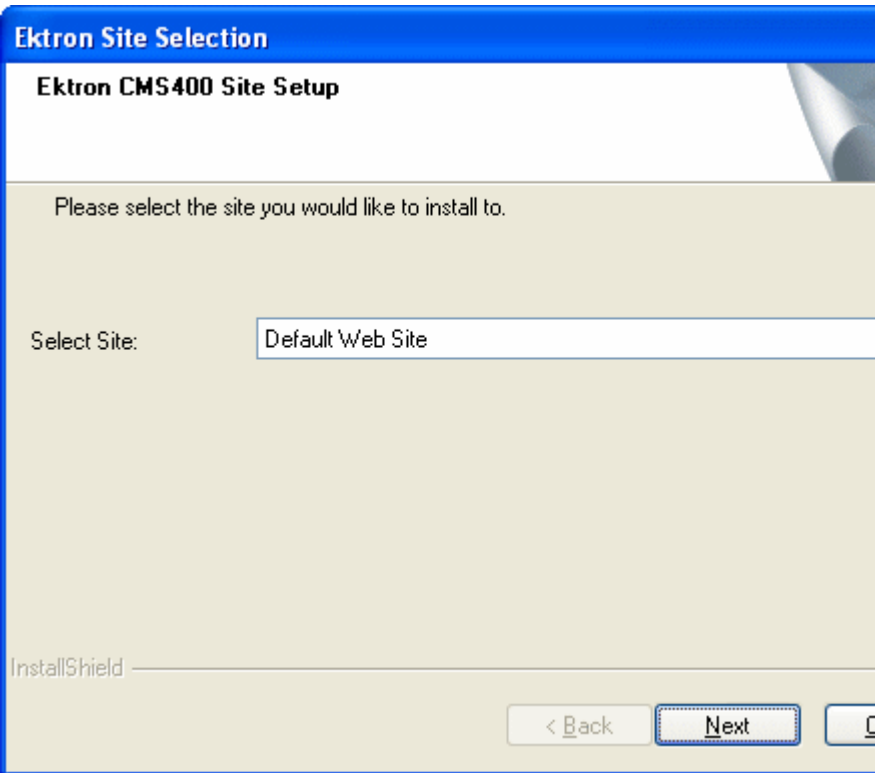
Installing the Site Replication Utility

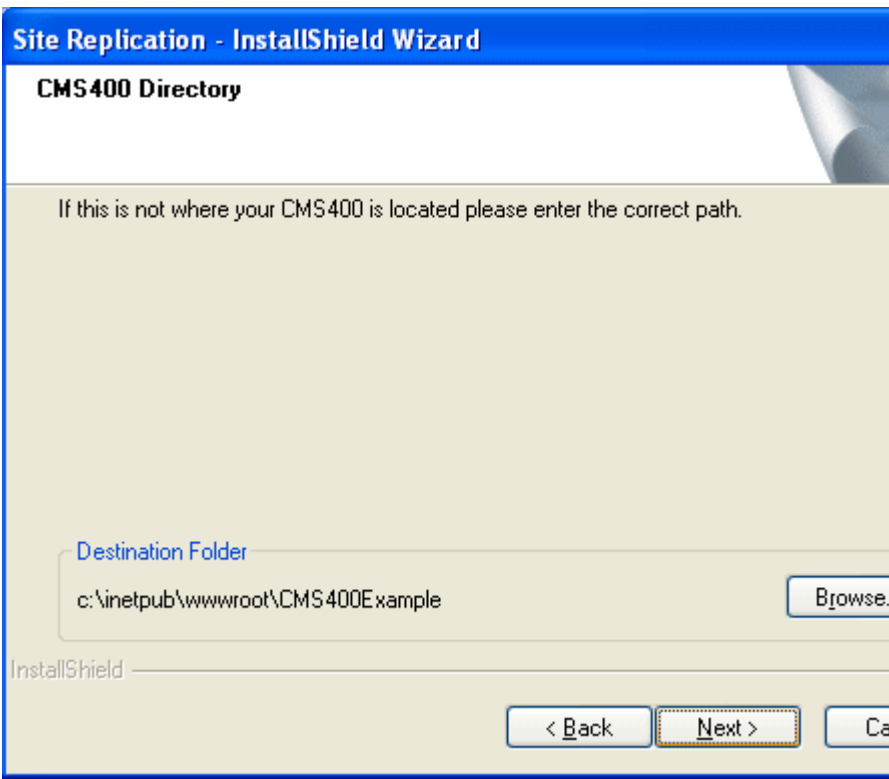
You must install the Site Replication utility on the staging server and all production servers. After installing on a server, you should configure it. See Also: ["Configuring the Site Replication Utility" on page 551](#)

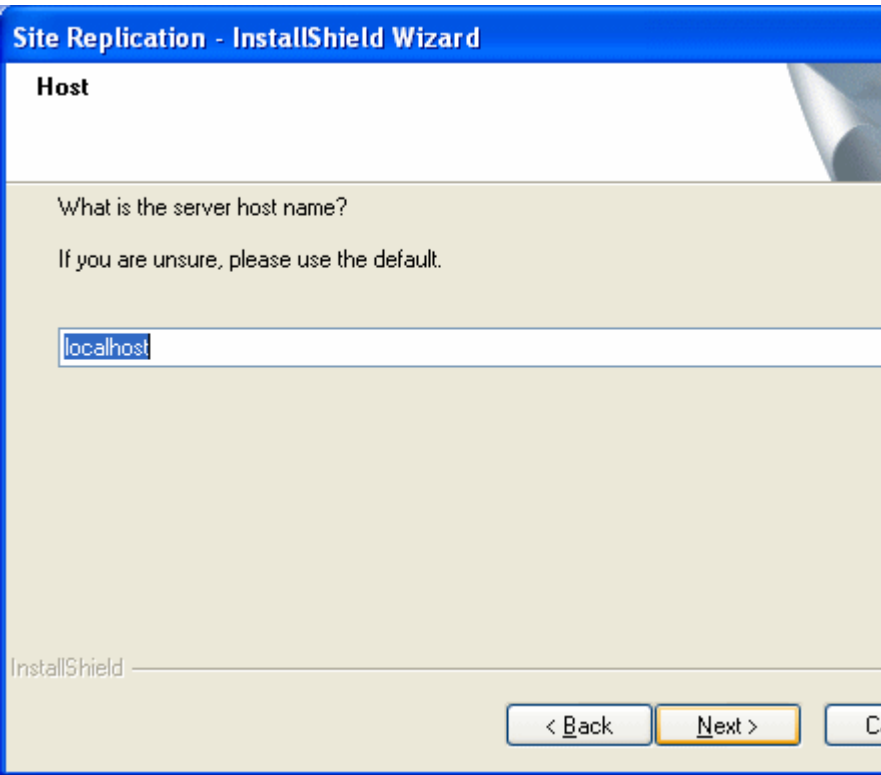
1. Download the Site Replication.exe file from Ektron's Web site.
2. Double click the downloaded file.
3. Follow the screen directions as they appear.

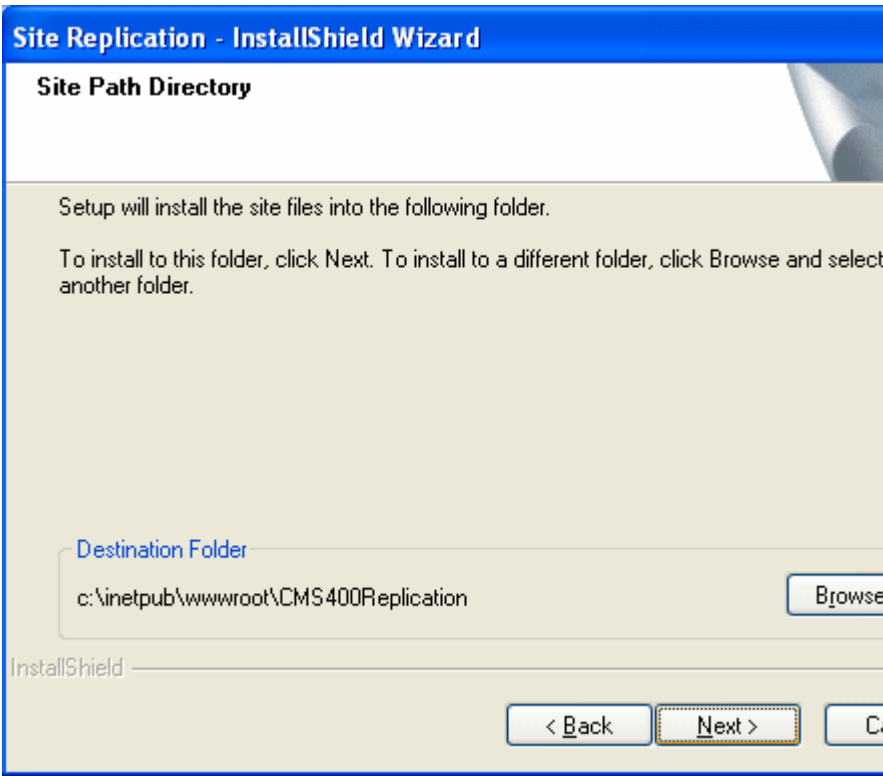
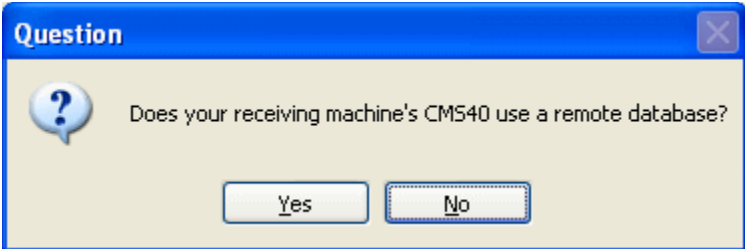
Directions	Screen
<p>1. Indicate if this is a new installation or an upgrade.</p> <p>If doing an upgrade, only perform steps 3 and 6 below.</p>	

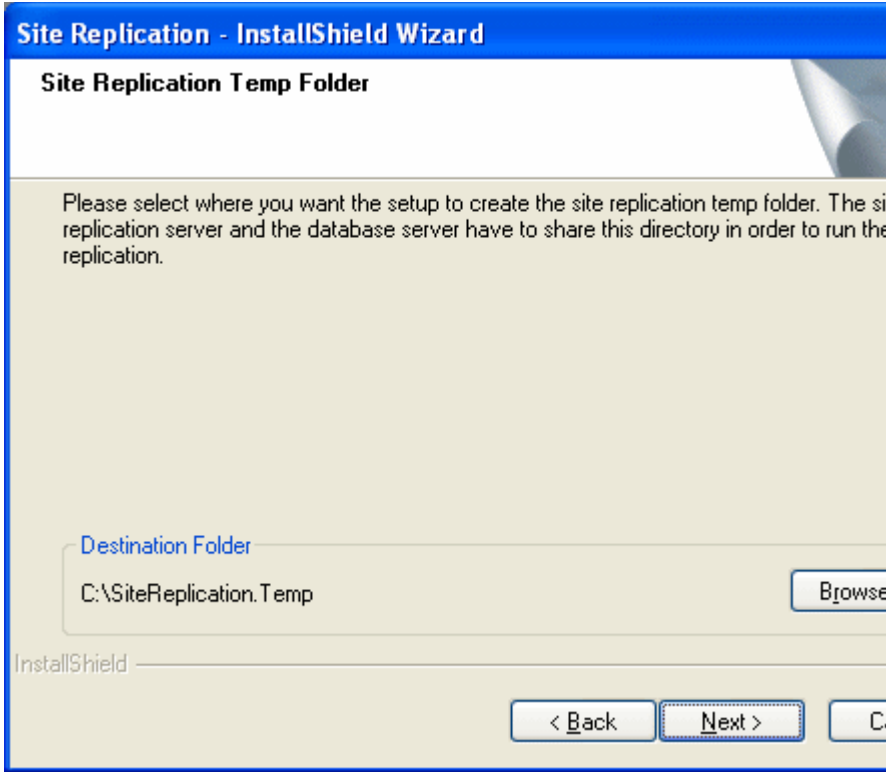
Directions	Screen
<p>2. Indicate whether the server on which you are installing will be used to <i>send</i> or <i>receive</i> information. A staging server would send, while a production server would receive.</p>	

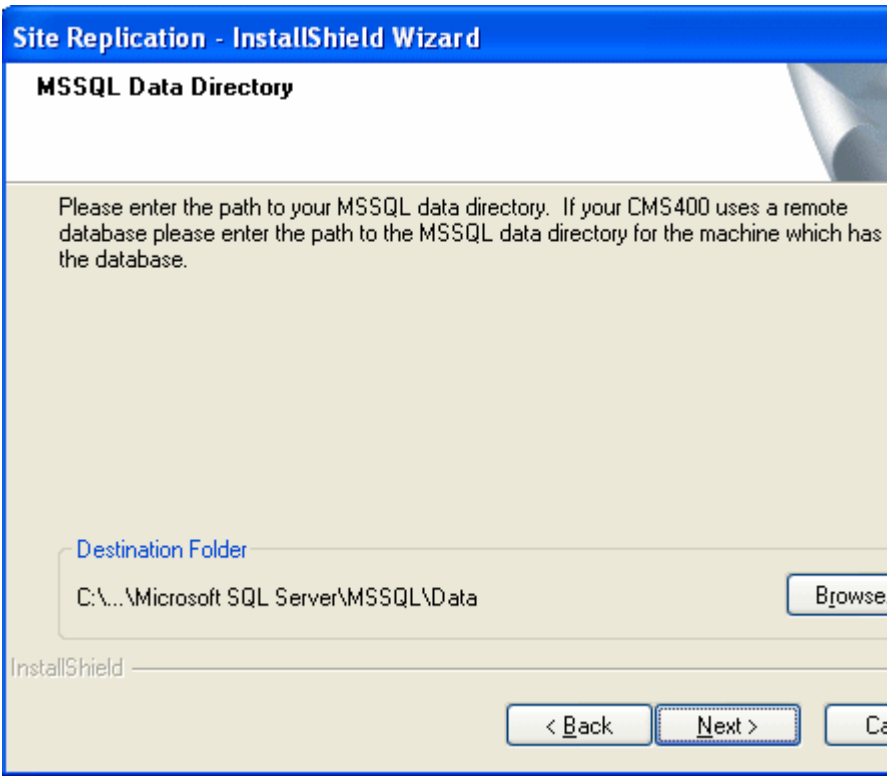
Directions	Screen
<p>3. Identify the Web site for which you are installing the Site Replication utility.</p> <p>If you are unsure, accept the default.</p>	

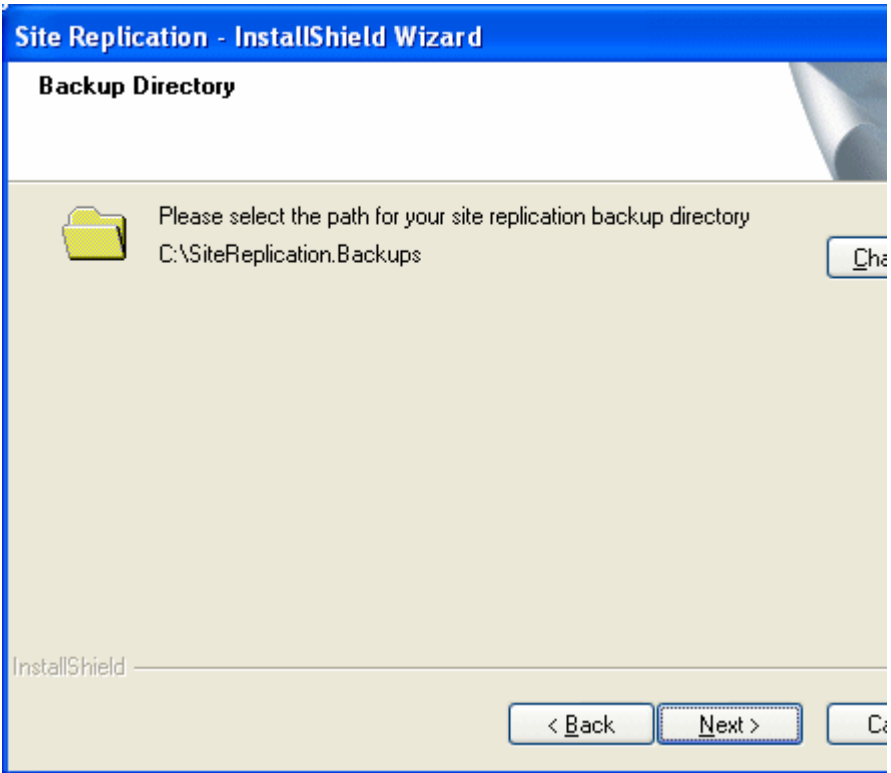
Directions	Screen
<p>4. Enter the directory in which Ektron CMS400.NET resides.</p>	

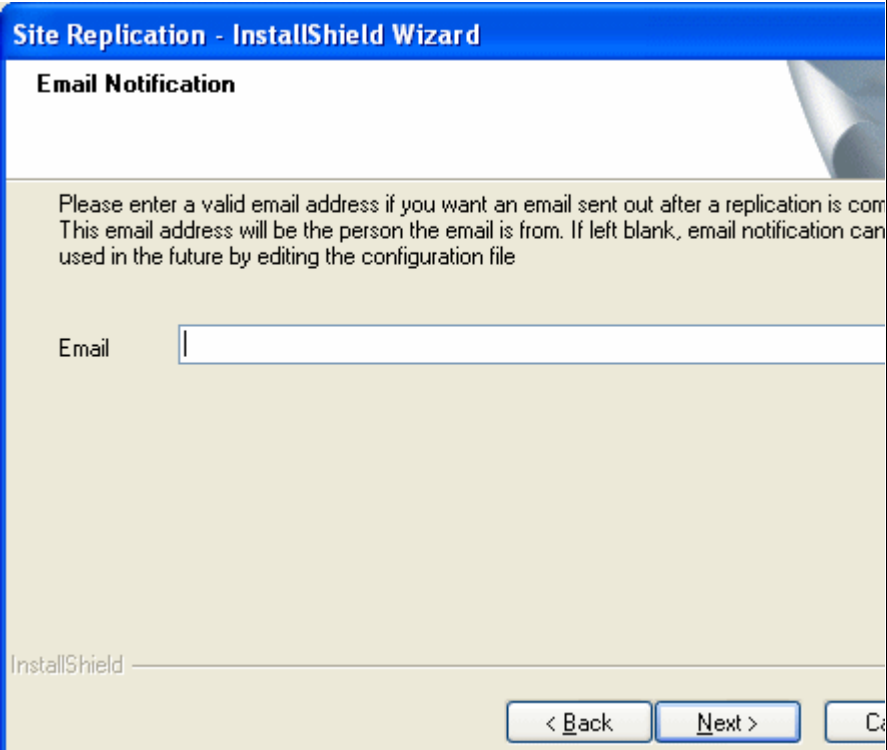
Directions	Screen
5. Enter the server host name.	 <p>Site Replication - InstallShield Wizard</p> <p>Host</p> <p>What is the server host name?</p> <p>If you are unsure, please use the default.</p> <p>localhost</p> <p>InstallShield</p> <p>< Back Next > Cancel</p>

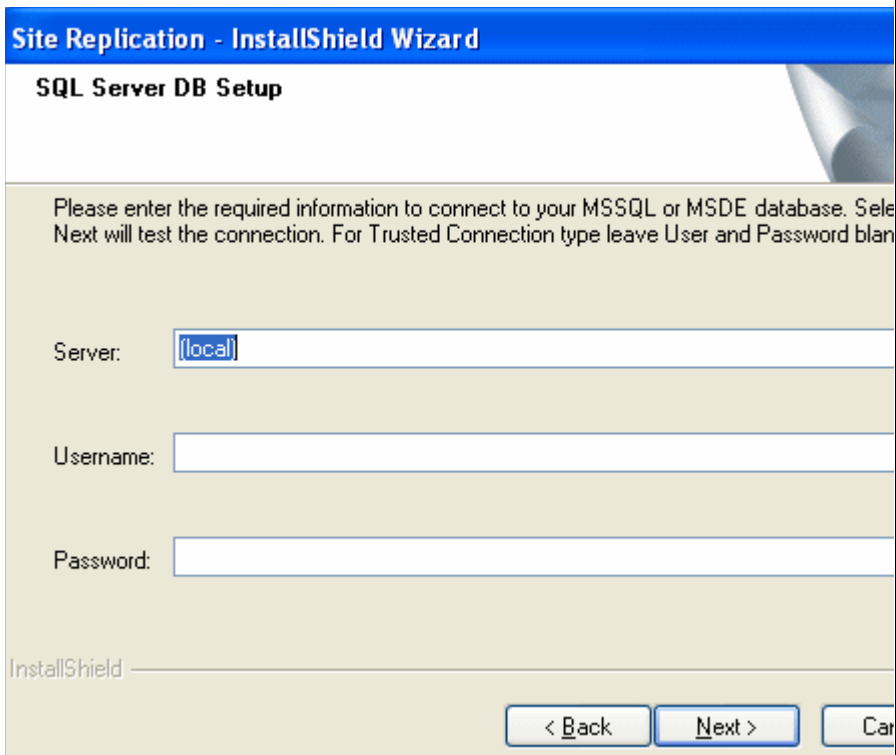
Directions	Screen
<p>6. Enter the folder to which the Site Replication files will be installed. If you are unsure, accept the default.</p>	
<p>7. Click Yes or No to indicate if the server uses a remote database. That is, a database stored on a separate server.</p>	

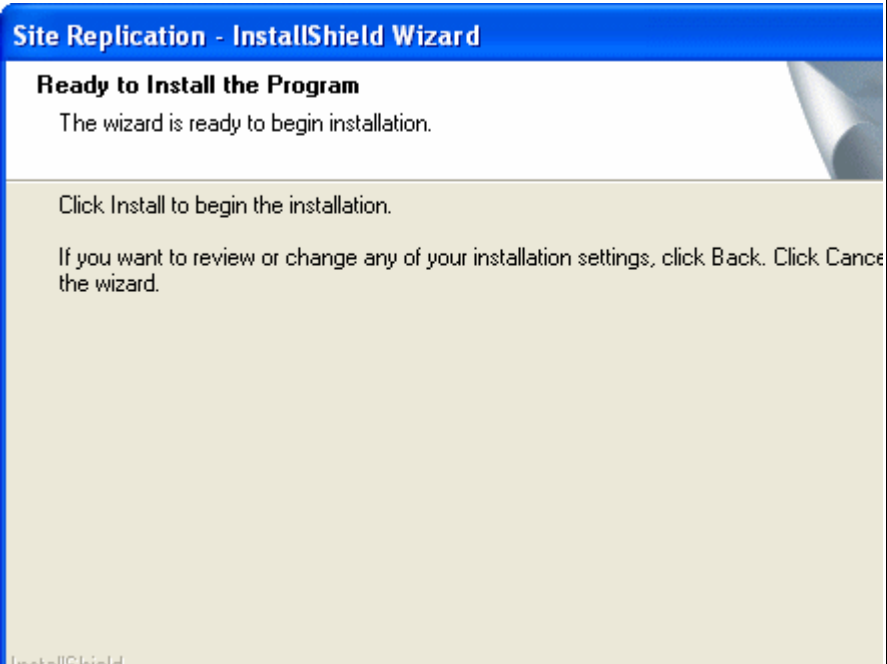
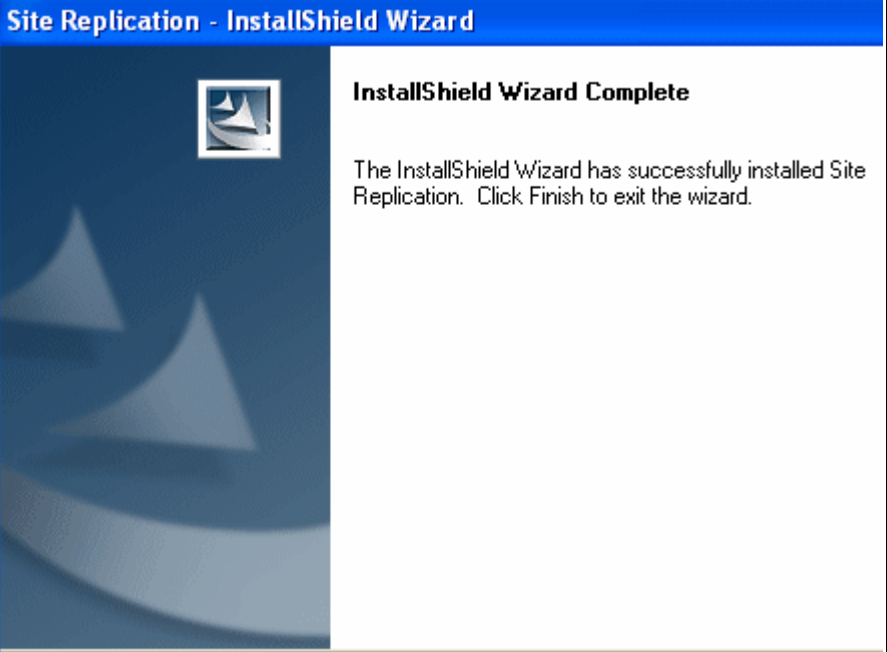
Directions	Screen
<p>8. If your receiving server uses a remote database server, the Site Replication feature uses a temporary folder to store the database prior to replication.</p> <p>A default folder to be used for this purpose appears. You can accept the default or navigate to a different folder on the receiving server.</p>	 <p>Site Replication - InstallShield Wizard</p> <p>Site Replication Temp Folder</p> <p>Please select where you want the setup to create the site replication temp folder. The site replication server and the database server have to share this directory in order to run the replication.</p> <p>Destination Folder C:\SiteReplication.Temp</p> <p>Browse...</p> <p>InstallShield</p> <p>< Back Next > Ca</p>

Directions	Screen
<p>9. On the receiving server, enter the path to your installation of the MS SQL Server Data directory.</p>	 <p>The screenshot shows a window titled "Site Replication - InstallShield Wizard". The main heading is "MSSQL Data Directory". Below this, a text box contains the instruction: "Please enter the path to your MSSQL data directory. If your CMS400 uses a remote database please enter the path to the MSSQL data directory for the machine which has the database." There is a text input field labeled "Destination Folder" containing the path "C:\...\Microsoft SQL Server\MSSQL\Data". To the right of the input field is a "Browse" button. At the bottom of the window, there are three buttons: "< Back", "Next >", and a partially visible "Ca" button. The "InstallShield" logo is visible in the bottom left corner of the window.</p>

Directions	Screen
10. Enter the path to your backups directory.	

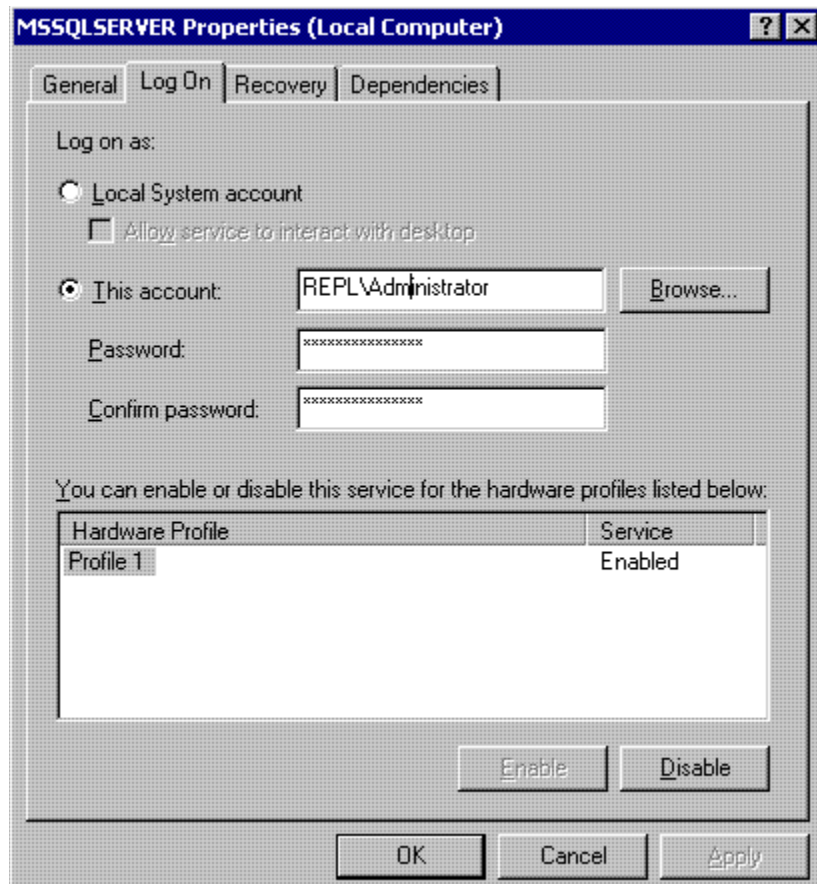
Directions	Screen
<p>11. If you are configuring a sending server, you are prompted to enter a "from" email address. When site replication finishes, the notification uses this as the "from" email address.</p> <p><u>Note: You can enter a "to" email address on the configuration screen.</u></p>	

Directions	Screen
<p>Server Field</p> <p>Enter the path to the server that hosts the database. If using a remote database, enter the path to the database server, <i>not</i> the receiving server.</p> <p>Username and Password Fields</p> <p>If using a trusted connection, leave the username and password blank. Otherwise, enter a username and password specific to the database for the receiving and sending server.</p>	

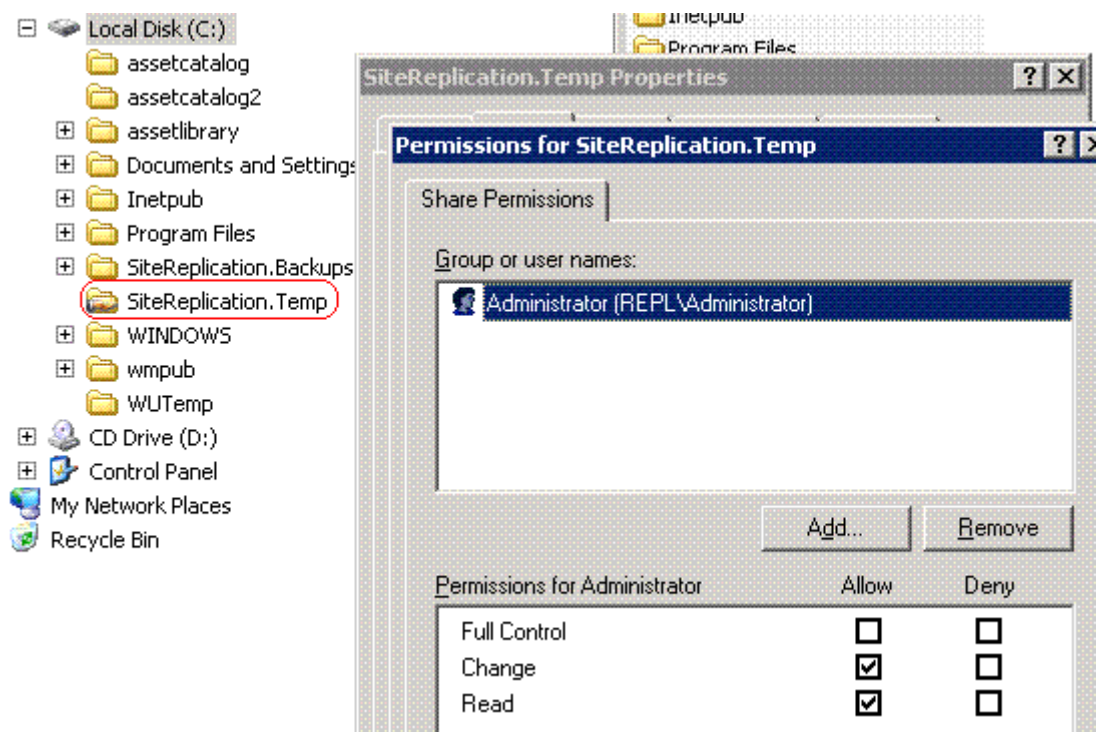
Directions	Screen
<p>12. Click the Install button to begin the installation.</p>	
<p>13. The installation begins. When it is done, the screen on the right appears.</p>	

Additional Steps Prior to Configuring the Site Replication Utility

- If you are *not* using a trusted connection, the login user defined in the **Ektron CMS400.NET** web.config file needs sysadmin privileges.
If you *are* using a trusted connection, the user running the replication needs sysadmin privileges.
- If you are using a remote database, configure the MSSQL Windows Service on the remote server to run as a Domain user. To do this, follow these steps.
 - Go to Control Panel.
 - Select **Administrative Tools**.
 - Select **Services**.
 - Right click **MSSQL Server**.
 - Select **Properties**.
 - Click the **Log On** tab.
 - Select **This account**.
 - Click the **Browse** button and find a domain user who exists on both the **Ektron CMS400.NET** and the database server.



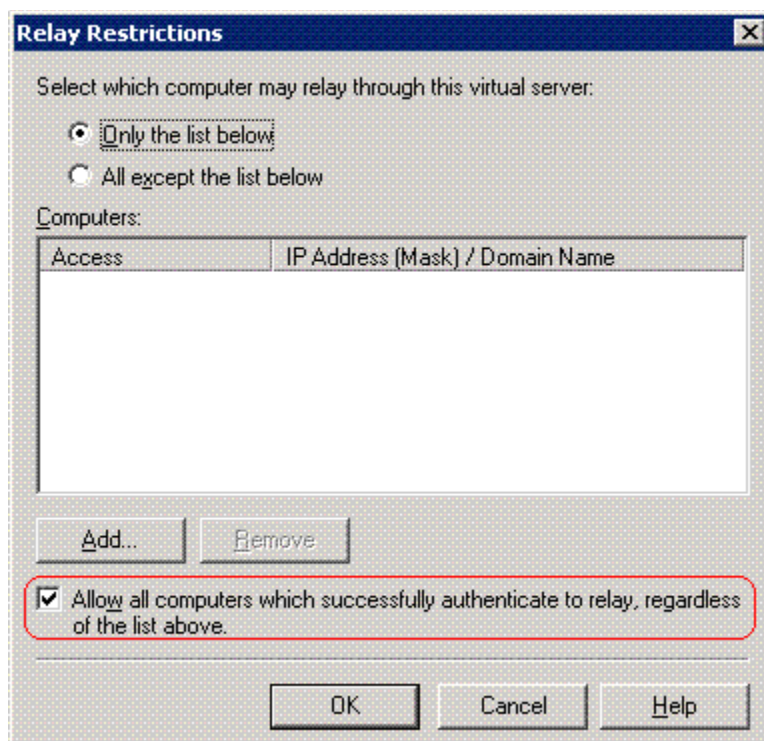
- Give the user selected above permission to read/write to the SiteReplication.Temp directory. To do so, follow these steps.
 - Open Windows Explorer.
 - Right mouse click the `c:/replication.temp` folder.
 - Select **Properties**.
 - Click **Sharing** then **Permissions**.
 - Assign to the user selected above permission to read and write to this directory.



- If you will use email notification for the completion of the replication, SMTP must be running on the sending (staging) server's IIS, and the CDO objects must be installed. Mail will be sent from CMS400 Site Replication.

Also, verify that your SMTP server allows relaying from the sending machine. You may need to set the SendEmailFrom tag in the siterepl.config file to a valid internet email address. You can use the SendEmail web services API test in replication.asmx to test the configuration.

- Make sure that under the Default SMTP Virtual Settings properties, on the Access tab, the following field is checked **Allow all computers which successfully authenticate to relay, regardless of the list above.**



See Also:

- ["Updating Membership Users" on page 549](#)
- ["Preserving Database Tables" on page 550](#)

Updating Membership Users

Typically, membership users are site visitors who register themselves via Web pages that reside on a production server. So, you would not want membership information on the staging server to overwrite that information.

However, if your staging server contains membership users that you want to move to the production server, follow these steps. You might do this on a one-time basis if, for example, your production server is in the process of going live.

1. On the production server, navigate to the folder `CMS400 server/ Documents and settings/all users/application data.`

2. Open the `sitereplCMS400Replication.config` file with a simple word processor, such as Notepad.
3. Set the value of `PreserveMembershipUsers` to **False**.
`<entry name="PreserveMembershipUsers">False</entry>`
4. Save and close the file.

The next time you run Site Replication, all membership user information on the staging server will be sent up to the production server.

After running the replication, you would typically change the value of `PreserveMembershipUsers` to **True**, so that subsequent replications do not affect membership users on the production server.

Preserving Database Tables

Some customers have a custom set of tables in the production database for tracking unique information. If your site has custom tables that you want to preserve during replication, follow these steps to instruct the site replication to do that.

1. On the production server, navigate to the folder `CMS400 server/ Documents and settings/all users/application data`.
2. Open the `sitereplCMS400Replication.config` file with a simple word processor, such as Notepad.
3. Within the `PreserveTables` entry, list the tables to be preserved during replication.
`<entry name="PreserveTables">my_custom_table_tbl</entry>`

NOTE

If you enter more than one table, separate each with a comma.

Since the tables may have foreign key relationships, list the primary key tables first. When the tables are deleted, they are deleted in reverse order, so there are no foreign key errors.

When the tables are copied, it is done in forward order so the primary keys are restored before the foreign keys reference them.

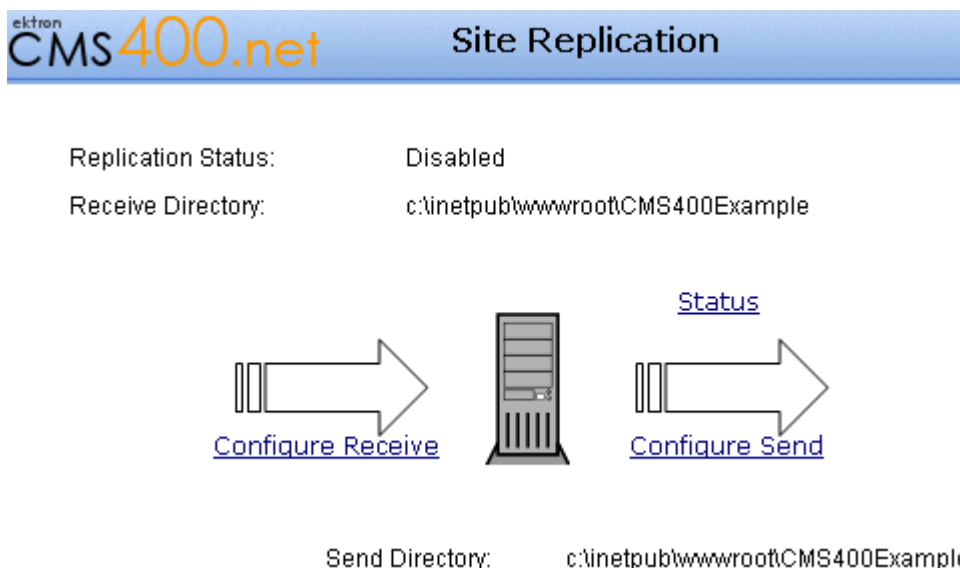
4. Save and close the file.

Configuring the Site Replication Utility

To configure the Site Replication utility, enter the following into your Web browser's address field:

`http://localhost/cms400replication/ConfigReplication.aspx`

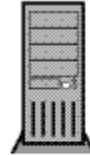
The following screen appears if you chose to set up a receiving machine.



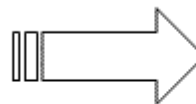
The following screen appears if you chose to set up a sending machine.

Receive Directory: c:\inetpub\wwwroot\CMS400Example

[Configure Receive](#)



[Configure Send](#)



[Status](#)

Send Directory: c:\inetpub\wwwroot\CMS400Example

This screen displays the following Site Replication information:

- current status
- the receiving directory
- the sending directory

More importantly, this screen provides access to other screens that let you configure, run, and get a detailed status of the replication process.

Specifically, click **Configure Send** to configure your staging server, and **Configure Receive** to configure a production server.

NOTE

Only configure the send page on the staging server, and the receive page on the production server.


See Also:


- "Configuring the Receiving Server" on page 553
- "Configuring the Sending Server" on page 555
- "The Site Replication Status Page" on page 560

Configuring the Receiving Server

Use the configuration receive page to set up information about a receiving server.

NOTE To return to the home screen, click [Replication](#) in the top left corner.

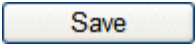
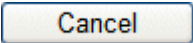
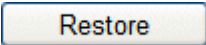
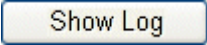
[Replication](#) > Receive 

Enable Receive:	<input checked="" type="checkbox"/>
Receive Web Site:	Default Web Site 
Receive Directory:	c:\inetpub\wwwroot\CMS400Example
Valid Username:	<input type="text"/>
Valid Sender IP:	<input type="text"/>
Backups Directory:	C:\SiteReplication.Backups
MSSQL Data Directory:	C:\Program Files\Microsoft SQL Server\MSSQL\Data
DB Server's Temp Dir:	<input type="text"/>
Receive DB Temp Dir:	<input type="text"/>

Replication Backups: 0

The following table explains the screen's fields.

Field	Description
Enable Receive	<p>Determines whether the server you are signed into can receive Site Replication information.</p> <p><input checked="" type="checkbox"/> Checked = Receive</p> <p><input type="checkbox"/> Not checked = Do not receive</p>
Receive Web Site	Identify the site directory on the receiving (production) server that is updated when Site Replication occurs.
Receive Directory	<p>The site directory on the receiving (production) server that is updated when Site Replication occurs. For example:</p> <p><code>c:\inetpub\wwwroot\CMS400Example</code></p> <p><u>Note: If you just installed the Site Replication utility, the receiving directory you specified during installation appears.</u></p>
Valid Username	<p>Username used for authentication on receiving (production) server. If you are setting up a receiving server that uses a trusted connection, this user needs sysadmin access for MSSQL.</p> <p>Also, this value must match the Username on the Configuration Sending Server screen.</p> <p>Ektron recommends entering the name in this format: domain name\username.</p> <p><u>Note: You do not need to complete this field. If you do, this information provides additional security for which user can send data to this server.</u></p>
Valid Sender IP	<p>The IP address of the sending (staging) server whose information will be synchronized with the production server you are configuring. It must be a static IP address.</p> <p><u>Note: You do not need to complete this field. If you do, this information provides additional security for which server can send data to this server.</u></p>
Backups Directory	<p>The location of the Site Replication backup files. For example:</p> <p><code>c:\SiteReplication.Backups</code></p> <p>The backup directory may require a large amount of space, depending on the size of your site and if you are using the Document Management Functionality. See Also: "Viewing and Restoring a Backup of the Production Server" on page 564</p>

Field	Description
MSSQL Data Directory	The location of the MSSQL database directory. The default is: c:\Program Files\Microsoft SQL Server\MSSQL\Data The WS User identified above must have write permission to this directory.
DB Server's Temp Dir	Most databases can only backup and restore to a local drive. So if your database server is on a different machine than your CMS, both machines must share a domain/group and a user/password for directory access. Ektron recommends setting up a separate directory named SiteReplication.Temp and sharing it on the staging or production server (whichever uses the remote database server). The database server can connect to this network share via a UNC path. <u>Note: The MSSQL service must run as a domain user to be able to access a UNC share.</u>
Receive DB Temp Dir	If the receiving server uses a remote database server, enter the UNC path to the shared directory on that server. See Also: "DB Server's Temp Dir" on page 555
Save Button 	Save the receiving (production) server information.
Cancel Button 	Ignore all information entered; return to the Site Replication home screen.
Replication Backups	Displays the number of Site Replication backups stored in the backups directory. Up to 10 backups are kept. The selection box directly below this label lists the most recent 10 backups. See Also: "Viewing and Restoring a Backup of the Production Server" on page 564
Button 	Choose a backup from the replication backups selection box. Click Restore to replace the site on the receiving server with the selected backup. See Also: "Viewing and Restoring a Backup of the Production Server" on page 564
Show Log 	Choose a backup from the replication backups selection box. Click Show Log to view a log of the backed up data.


Configuring the Sending Server

Use the Configure > Send page set up information about the sending (staging) server.

NOTE To return to the home screen, click [Replication](#) in the top left corner.

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Site Replication

[Replication](#) > Send 

Destinations:


Add

Send Directory:

c:\inetpub\wwwroot\CMS400Example

Exclude Files:


Send DB When:

Always 

Username:

Password:

Schedule On:

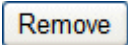
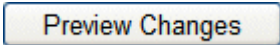
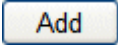


DB Server's Temp Dir:



Send DB Temp Dir:

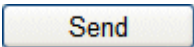
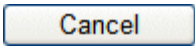
E-Mail Notification To:

The following table explains the screen's fields.

Field	Description
Destinations	<p>The path to the replication.asmx file on every <i>production</i> server that will be updated by this staging server. For example:</p> <pre>http://productionserver1/CMS400replication/replication.asmx</pre> <p>or</p> <pre>http://198.0.25.214/CMS400replication/replication.asmx</pre> <p>You must enter the username and password needed to access that folder before pressing the Add button to add a destination folder.</p>
Remove Button 	Use to remove a destination from the Destinations field.
Preview Changes Button 	<p>Preview a list of changes to take place when the Site Replication occurs. Use this feature to examine which changes are scheduled before replication begins.</p> <p>Before pressing this button, make sure a valid destination appears in the Destinations field, and the username and password needed to access that folder appear in their respective fields.</p> <p>Then, select a production server from the Destinations field.</p> <p>See Also: "Previewing the Site Replication Process" on page 561</p>
Add Button 	<p>Add a new Destination. See Also: "Destinations" on page 557</p> <p>Before pressing this button, make sure that a valid destination appears in the Destinations field, and the username and password needed to access that folder appear in their respective fields.</p>
Send Directory	<p>The location of site directory on the sending server whose content will be synchronized with the production server. For example:</p> <pre>c:\inetpub\wwwroot\CMS400ExampleStaging</pre>
Exclude Files	<p>If you want to exclude certain file types from the replication, enter them here. For example, you may want to exclude all PDF files.</p> <p>For each file type, enter an asterisk (*), period(.), then the file extension. For example *.pdf.</p> <p>Separate each extension with a comma.</p>

Field	Description
Send DB When	<p>Indicate if you want to copy the Ektron CMS400.NET database to the named destination servers. Your choices are:</p> <ul style="list-style-type: none">• Always• 1st Destination only (only copy the database to the first destination server listed above)• Never
Username	<p>Username used for authentication on receiving (production) server. If you are setting up a receiving server that uses a trusted connection, this user needs sysadmin access for MSSQL. Enter the domainname\username.</p> <p>It must match the WS Username on the production server's Configuration Receiving Server screen.</p>
Password	<p>Password for the above user.</p>
Schedule On	<p>To begin the replication as soon as you press the Send button, leave this field blank.</p> <p>To schedule the replication for a future date and time, click the calendar button. See Also: "Calendar Button" on page 559</p>

Field	Description
Calendar Button 	<p>Launches a calendar. Use it to select a date and time to push site information from the sending (staging) to receiving (production) server.</p> <p>When you click Select date, the date and time are inserted into the Schedule On field.</p> <p>Note: If you select a past time, the replication process begins as soon as you click the Send button.</p> <p>For additional information on using the calendar, click the question mark (?) in the upper left corner (circled in red below).</p> 
DB Server's Temp Dir	<p>Most databases can only back up and restore to a local drive. So, if your database server is on a different machine than your CMS, both machines must share a domain/group and a user/password for directory access.</p> <p>Ektron recommends setting up a separate directory named SiteReplication.Temp and sharing it on the site replication server. The database server can connect to this network share via a UNC path.</p> <p>So, if the sending server uses a remote database server, enter the site replication server's shared directory.</p>
Send DB Temp Dir	<p>If the sending server uses a remote database server, enter the UNC path to the shared directory on that server.</p>

Field	Description
email Notification to	<p>Use this field to notify someone when the site replication is finished. Enter the email address of the person you want to notify.</p> <p><u>Note: email notification only works if the sending server's SMTP mail service is enabled. See Also: "If you will use email notification for the completion of the replication, SMTP must be running on the sending (staging) server's IIS, and the CDO objects must be installed. Mail will be sent from CMS400 Site Replication." on page 548</u></p> <p>Here is an example of the email resulting from a successful replication.</p> <p>Completed At 10/7/2005 9:50:26 AM</p>
Send Button 	Begin the Site Replication process. If you scheduled a date/time, the process is delayed until then.
Cancel Button 	Ignore all information entered; return to the Site Replication home screen.

The Site Replication Status Page

The status page keeps you informed of the Site Replication process. Specifically, it lists the current status of the Site Replication. Also, If a replication is currently in progress, the page displays

- the percentage of completion
- the file currently being replicated
- the destination server's URL

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Site Replication

[Replication](#) > Status

Destination:

http://192.168.0.215/CMS400Replication/Replication.aspx

Overall:

Current File:

Checking for updated files

Status:

Replication in progress...
0 KBytes sent.
Time elapsed: 00:00:06.2034426
0 KBytes/sec

Cancel

Previewing the Site Replication Process

After you configure the Site Replication utility, you can preview the results before beginning the actual replication. The preview displays which files will be transferred by the replication.

If the list looks correct, you can proceed with the replication. If the list looks wrong or incomplete, you can review the contents of the sending (staging) server to make sure that all content has been updated properly. Then, run the preview again to make sure the list of files to be moved is correct before beginning the actual replication.

To use the preview feature, follow these steps.

1. To access the Site Replication utility, enter the following into your Web browser's address field:
`http://localhost/cms400replication/ConfigReplication.aspx`
2. Click **Configure Send**.
3. In the **Destination** field, select the production server with which you will synchronize.

4. Enter the password required to access that production server.
5. Click the **Preview Changes** button.
6. A list of files to be transferred to the production server appears.

Performing Site Replication

For background information about Site Replication, see ["Site Replication" on page 528](#).

After you configure the Site Replication utility, you can begin the actual replication.

IMPORTANT!

Make sure that the system clock on both servers is set to the same time. The Site Replication software uses the clock to determine which files to replicate.

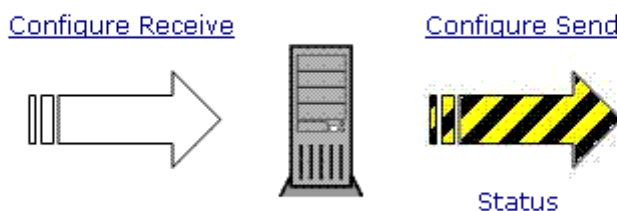
Before beginning the site replication, you might want to check free space on the receiving (production) server to make sure it has enough room to accommodate your site directory on the sending (staging) server. Also, Ektron recommends using the Preview feature to identify which files will be moved by the replication prior to beginning. See Also: ["Previewing the Site Replication Process" on page 561](#)

To use the Site Replication, follow these steps.

1. To access the Site Replication utility, enter the following into your Web browser's address field:
`http://localhost/cms400replication/ConfigReplication.aspx`
2. Click **Configure Send**.
3. In the **Destination** field, select the production server with which you will synchronize.
4. Enter the Username and password required to access that production server.
5. If you want to begin the replication in the future, use the **Schedule on** field. See Also: ["Schedule On" on page 558](#). Otherwise, proceed to the next step.
6. Click the **Send** button.
7. The replication begins.

8. The main screen of the sending server changes to the following, indicating you cannot edit its configuration information while replication is taking place.

Receive Directory: c:\inetpub\wwwroot\CMS400Example



Send Directory: c:\inetpub\wwwroot\CMS400Example

9. To view the progress of the replication, click **Status**. A screen like the following displays.

Destination: http://192.168.0.25/CMS400replication/replication.asp

Overall: 2441/3732



Current File: \Workarea\Help\images\edit_sea.gif



Status: Replication in progress...
89544 KBytes sent.
Time elapsed: 00:34:17.8352069
43 KBytes/sec

The screen displays the following information:

- **Destination** - the receiving server
- **Overall** - the number of files already transferred/the total number of files to be transferred
- **Current File** - the file currently being transferred

- **Status** - Information about the replication (number of kilobytes sent so far, time elapsed, speed of transfer)

10. A list of files transferred to the production server appears.

After completing the replication, it's a good idea to spot check the content on the production server to verify that the replication was successful.

Viewing and Restoring a Backup of the Production Server

When you run a Site Replication, a backup is made of the receiving (production) server before any new or updated files are copied from the sending (staging) server. Only files with the same name but a earlier edit date/time are backed up.

On the receiving (production) server's Configure Receive screen, you can see how many backups are available. Below that, a drop-down box displays information about each backup, such as its creation date.



Replication Backups: 1

#1 in C:\SiteReplication.Backups\9-29-2005_3~35~35_PM created by DOCUMENTATION\Administra

You can also view a log of the selected backup, which lists every file copied from the sending to the receiving server. To see the log, click the **Show Log** button.

See Also:

- ["How Backup Files Are Maintained and Numbered" on page 565](#)

- ["Restoring a Backup" on page 565](#)

How Backup Files Are Maintained and Numbered

The Site Replication utility only keeps the 10 most recent backups. So, if 10 are already available and you initiate a new replication, the oldest backup is removed, and the current files about to be replaced are saved as the number one backup. All remaining backups are renumbered one higher.

Restoring a Backup

When you restore a backup, only files that were overwritten and the web.config, assetmanagement.config, assetmanagementdata.config files are restored. Any new files copied to the production server are not deleted.

To restore a backup of files on the receiving (production) server, follow these steps.

1. To access the Site Replication utility, enter the following into your Web browser's address field:
`http://localhost/cms400replication/ConfigReplication.aspx`
2. Click **Configure Receive**.
3. In the bottom section of the screen, display the drop-down selection box under **Replication backups**.
4. Select the backup that you want to restore.
5. Click **Restore**.

Replicating to Multiple Sites

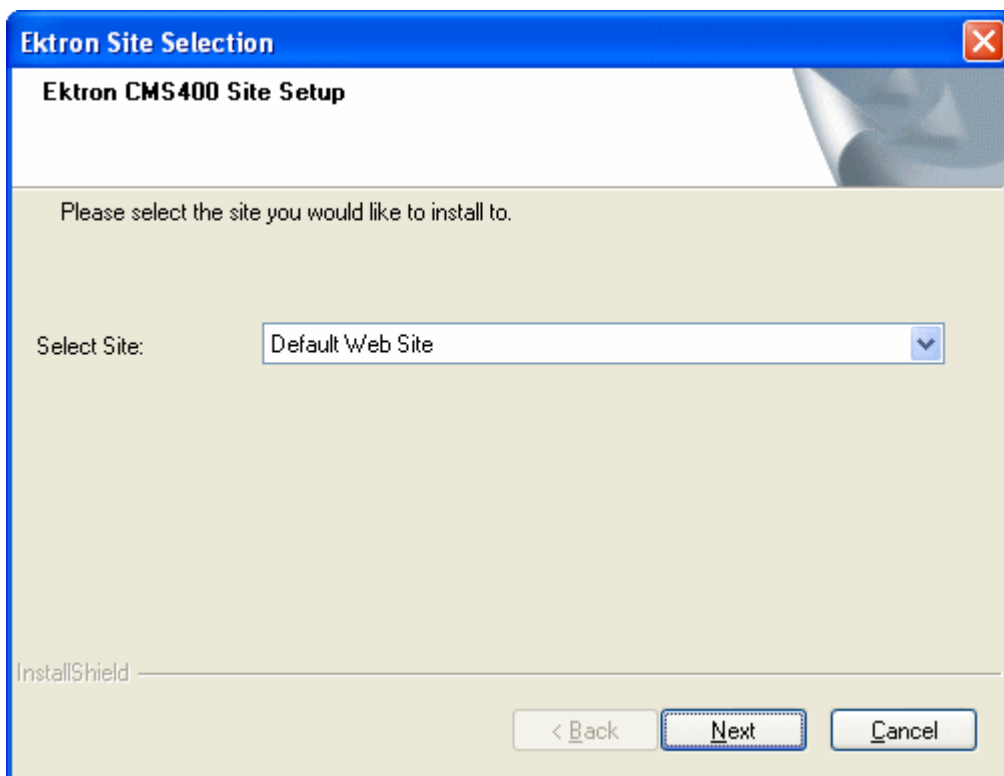
If you want to replicate the staging server content to multiple Web sites at one time, follow these guidelines.

1. While configuring the Replication Send screen, use the **Add** button to identify all destination directories. *See Also:* ["Configuring the Site Replication Utility" on page 551](#)
2. Run the Site Replication procedure for each site. In the **Destination** field, select the appropriate destination directory. *See Also:* ["Performing Site Replication" on page 562](#)

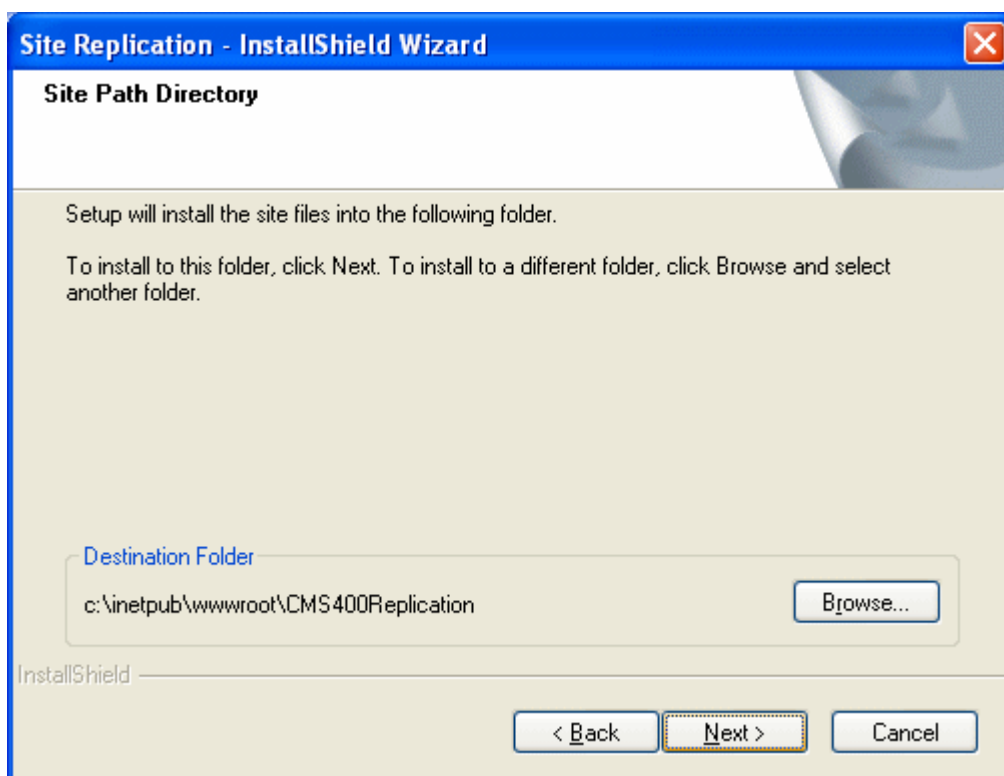
Supporting Several Sites on One Staging Server

If you want to maintain more than one site on the staging server, follow these guidelines.

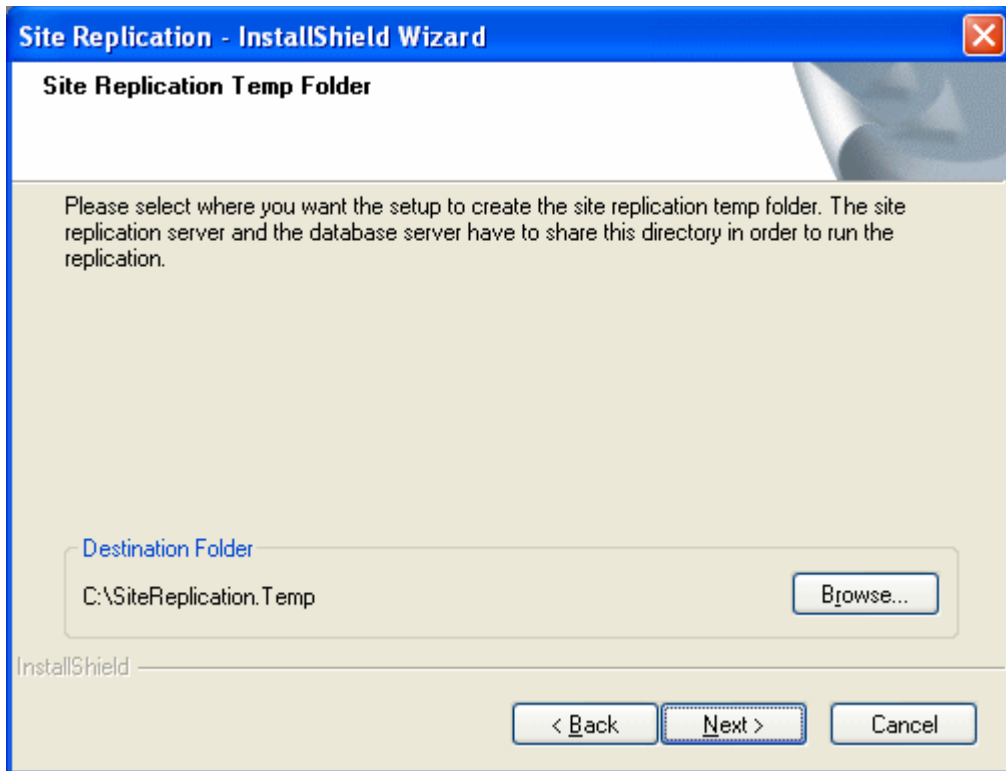
1. Install the Site Replication feature separately for each site. On the second screen of the installation, be sure the site is unique.



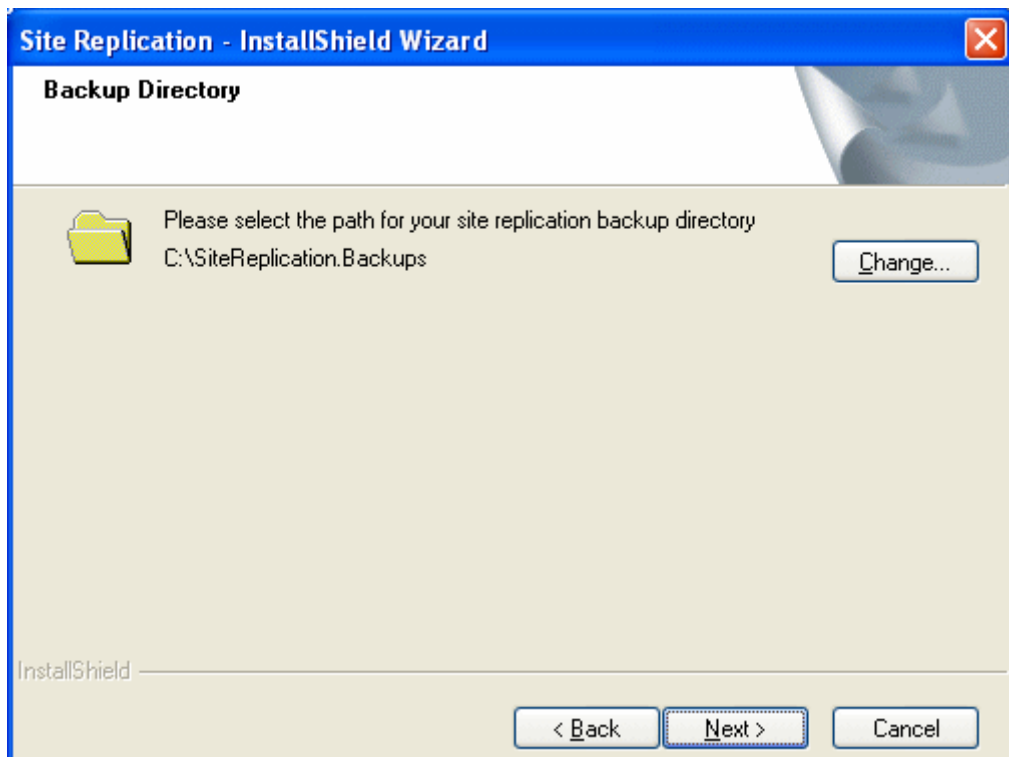
2. When asked to identify the site path directory, be sure the directory name is unique for each site.



3. If your receiving server uses a remote database server, each site needs its own temporary folder to store the database prior to replication. Specify a unique temporary folder for each site.



4. Specify a unique backup directory for each site.



Web Services

Web Services are reusable software components that can be consumed over the Web by means of standard Internet technologies. Mechanisms exist to publish and discover Web Services on the Web, allowing users to locate and integrate them into their applications.

A Web Service is comprised of one or more methods that expose functionality. A Web Service can be thought of as an Application Program(ming) Interface (API), the one big difference being, consumers can access the service using Simple Object Access Protocol (SOAP) over HTTP.

SOAP is an XML based lightweight protocol that defines the message format for Web Services, which allows heterogeneous systems to communicate with each other in a standard way. Seeing Web Services are based on ubiquitous technologies, they have been quickly accepted for the interchange of data.

For information about implementing Ektron CMS400.NET's Web services support for your Web site, refer to Web Services in the Ektron CMS400.NET Developer's Reference Manual.

Syndicating Web Content as RSS

RSS stands for Really Simple Syndication, a common method of syndicating Web content as an XML document. There are several versions of RSS. Ektron has implemented version 2.0.

In Ektron CMS400.NET, you use RSS to prepare a collection list or a list summary for reading by an *aggregator*. An aggregator consumes an RSS feed and displays it to the user. (An aggregator is similar in function to a portal.) There are several popular aggregators, including:

- AmphetaDesk (<http://www.disobey.com/amphetadesk/>)
- NewzCrawler (<http://www.newzcrawler.com/>).

For information about how to syndicate Ektron CMS400.NET as RSS, refer to Syndicating Web Content as RSS, in the Ektron CMS400.NET Developer's Reference Manual.

JavaScript Syndication

With the help of some JavaScript, Ektron CMS400.NET allows you to receive syndicated content from a server other than the one Ektron CMS400.NET is running on. Syndication lets you display or send out content that may or may not be your own.

The content can be viewed on an HTML Web page instead of an .aspx page that Ektron CMS400.NET typically runs with.

What is Syndication?

JavaScript syndication on a static, HTML-based Web site lets you retrieve content from an Ektron CMS400.NET Web site and post it on your Web site. When the content gets updated on the Ektron CMS400.NET Web site, it is updated on the static HTML page as well.

Syndication Example

This example uses the sample Ektron CMS400.NET Web site and a blank static HTML page to display syndicated content.

Let's begin by creating new content in Ektron CMS400.NET and entering information about the weather for New Hampshire.


Title:

Comment: ☒ Add to Quicklinks table

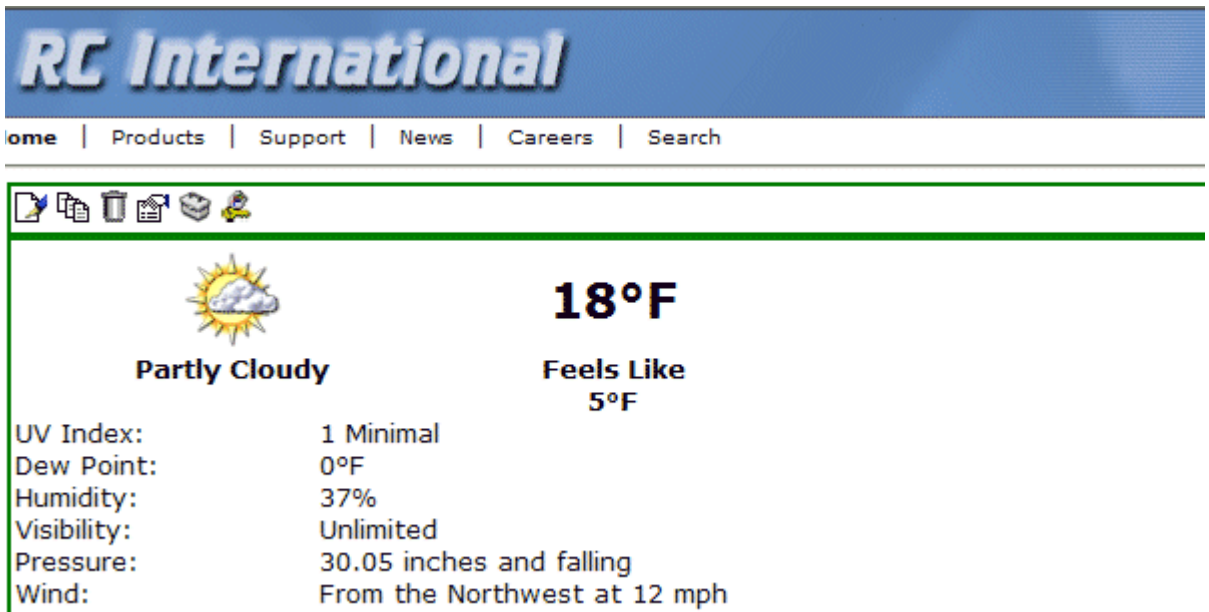
Start Date: End Date:

(Apply Style) Normal Verdana 2 (10 pt) **B** *I* U A

[Icons: Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Print, etc.]

		18°F
Partly Cloudy		Feels Like 5°F
UV Index:	1 Minimal	
Dew Point:	0°F	
Humidity:	37%	
Visibility:	Unlimited	
Pressure:	30.05 inches and falling	
Wind:	From the Northwest at 12 mph	

After we create content, we can publish it so that it is live on the Ektron CMS400.NET Web site.



After the content is published, and we know its ID number (in this case, ID=19), we can create a static HTML page to display this content. Below is the code for the HTML page that we will create.

```
<HTML>
  <HEAD>
    <TITLE>Weather</TITLE>
  </HEAD>
  <BODY>
    <script language="javascript" src="http://192.168.0.156/
      CMS400.NETSample/CMS400.NETscripts/jsyndication.aspx?id=19"></script>
  </BODY>
</HTML>
```

In this code, the source (src) of the script is made up of three parts:

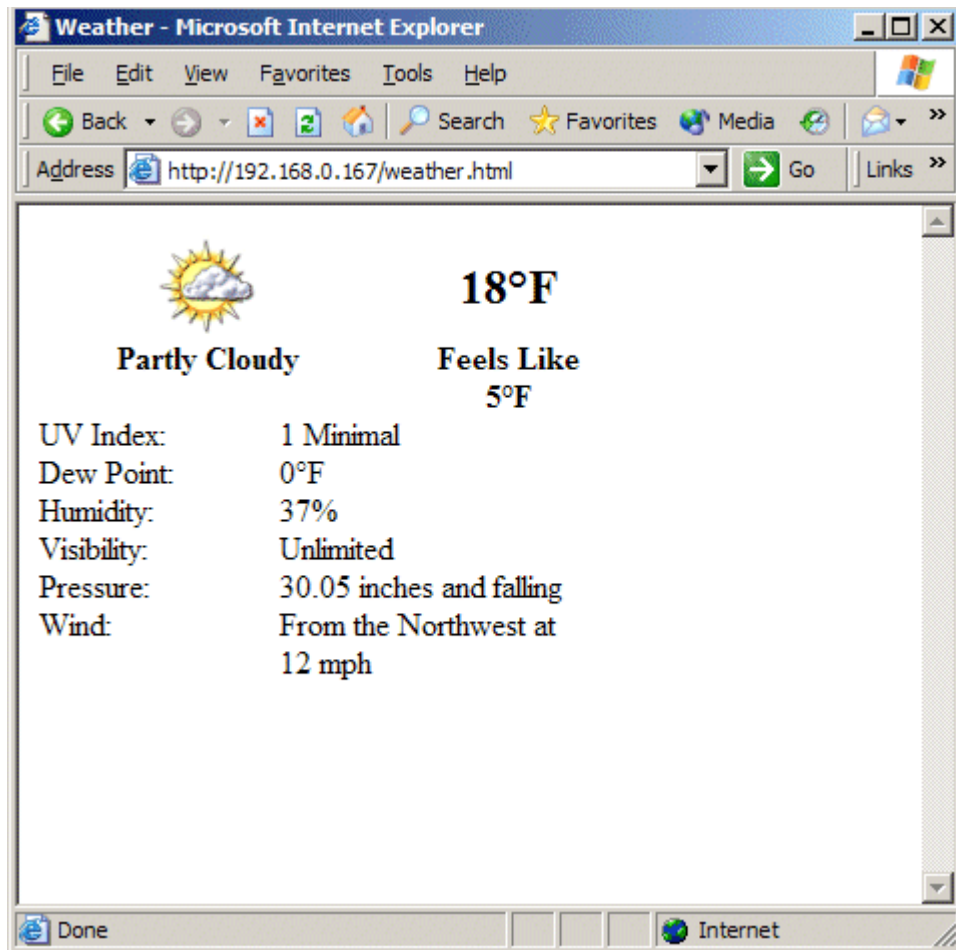
- The path of the Ektron CMS400.NET Web site
*http://192.168.0.111/CMS400.NETSample/
CMS400.NETscripts/*
- The syndication template
jsyndication.aspx
- The content ID number to be displayed.

?ID=19

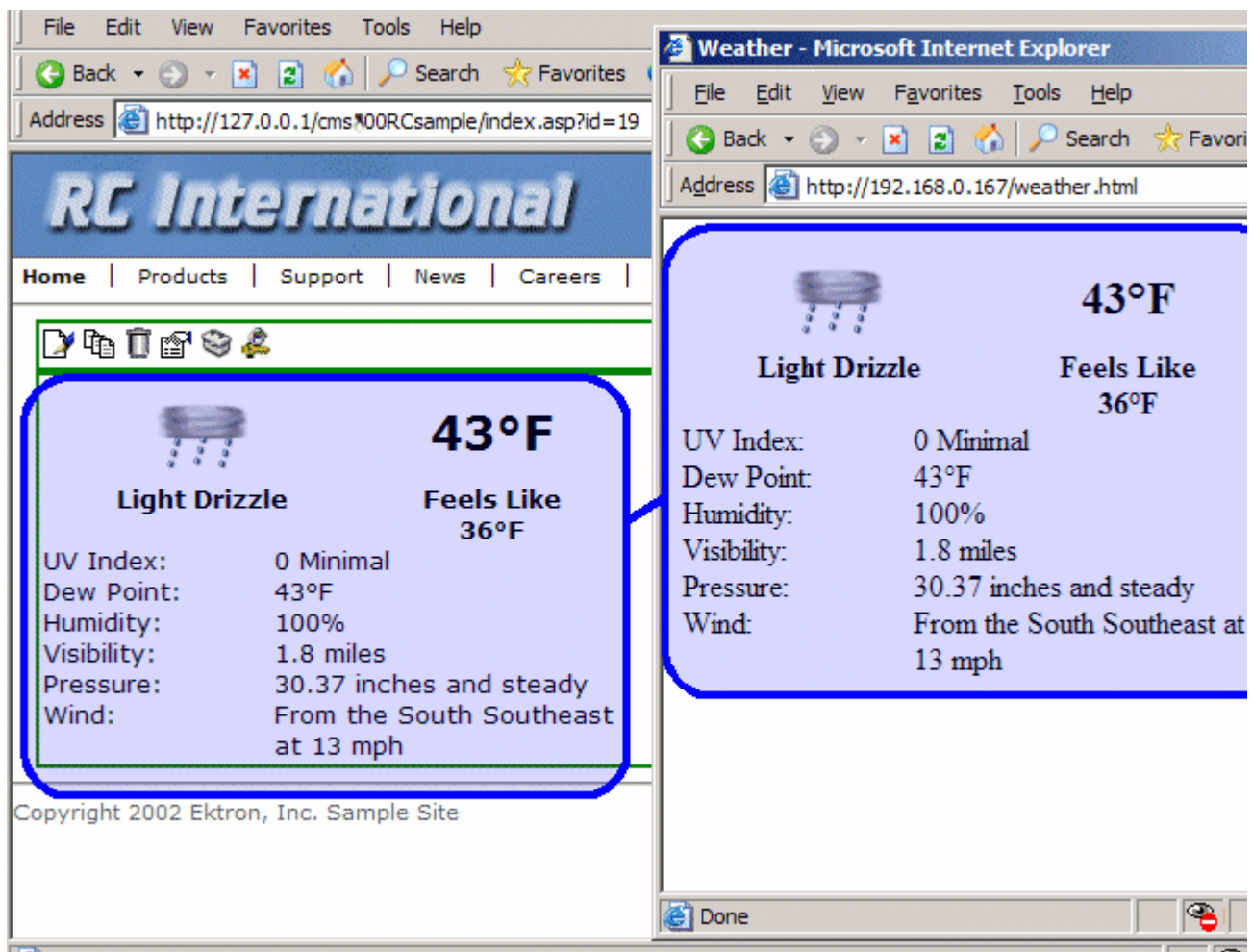
NOTE Each page that displays syndicated content *must* have all three parts of the JavaScript to display properly.

Once the script is inserted into the HTML page, you can view the syndicated content on the page via your browser.

:



When this content gets changed on the Ektron CMS400.NET Web site, the content on the HTML page changes as well.



Notice that the two content items are the same. If the content on the sample site changes, the content on the static HTML page automatically reflects the changes.

Hosting & Syndication

Syndication can be a very powerful tool if you are a hosting company. The JavaScript used to post syndicated content can be inserted into ASP, HTML, CFM, or any other types of templates.

If you host many Web sites, you can create a special place on each site to display syndicated content. For example, you could include up-to-date pricing for your services, information about your hosting company, etc.

When you implement this feature, the possibilities become endless, and the time required to update each Web site is drastically reduced.

In the diagram above, the Ektron site is displayed as the hosting company's Web site, while the sample site is the Web site where the content is also displayed.

See Also: ["Setting up a Syndicated Template" on page 577](#)

Setting up a Syndicated Template

Before a Web site can use your content, you must set up your Ektron CMS400.NET Web site to send out the content.

The template used to syndicate the content is left blank except for the code that handles the syndication. This is done so that the content being displayed on the other server only shows content from the content item, and no other images that might change the look and feel of the Web site.

To do this, create an Ektron CMS400.NET template that includes the following custom tag and nothing else.

```
<%option explicit%>
<!-- #include file=" web.config" -->
<%
dim currentUserID, jsObj
Dim cConts, conObj
Dim ErrString, id, Site

IF (request.cookies("ecm").HasKeys) THEN
    currentUserID = request.cookies("ecm")("user_id")
    Site = request.cookies("ecm")("site_id")
else
    currentUserID=0
    Site = ""
end if

Set jsObj = CreateObject("Scripting.Dictionary")
jsObj.Add "Browser" , Request.ServerVariables("http_user_agent")
jsObj.Add "ServerName" , Request.ServerVariables("SERVER_NAME")
jsObj.Add "ResolveImagePath" , TRUE
jsObj.Add "ResolveHrefPath" , TRUE
```

```
jsObj.Add "jsPath",Request.ServerVariables("HTTP_REFERER")
jsObj.Add "ContentID", Request.QueryString("id")
Set conObj = CreateObject("EkBrMach4Content.EkMach4Content")
if (Request.QueryString("id") <> "") then
Set cConts = conObj.jsyndication(AppConfStr, currentUserID, jsObj, Site, ErrString)
if (cConts.Count) then
%>
document.writeln('<% Response.write(
Replace(cConts("ContentHtml"),chr(13),"");document.writeln('" ) %>');
<%
end if
end if
Set jsObj = nothing
%>
```

Ektron CMS400.NET provides a special template named `jsyndication.aspx`. This template has no images, just the custom tag seen above. It is all that is needed to allow other servers to display your content.

Load Balancing

Load Balancing has two important purposes:

- Provides redundancy for your Web site - if one server fails, a second can still handle the requests
- Balances requests - distributes requests across two or more servers

To enable load balancing, set up several servers that include the same files. Then, purchase load balancing equipment to evenly distribute requests for content among the servers.

In both cases, the client (browser) is unaware that more than one server is involved. All URLs point to a single Web site. The load balance software resolves them.

Ektron provides different strategies for load balancing *library images and files* and *DMS assets*. See

- ["Load Balancing Library Images and Files" on page 579](#)
- ["Load Balancing Assets" on page 599](#)

Load Balancing Library Images and Files

Ideally, your load balancing strategy involves automatic replication of files in each directory specified by Ektron CMS400.NET to all servers.

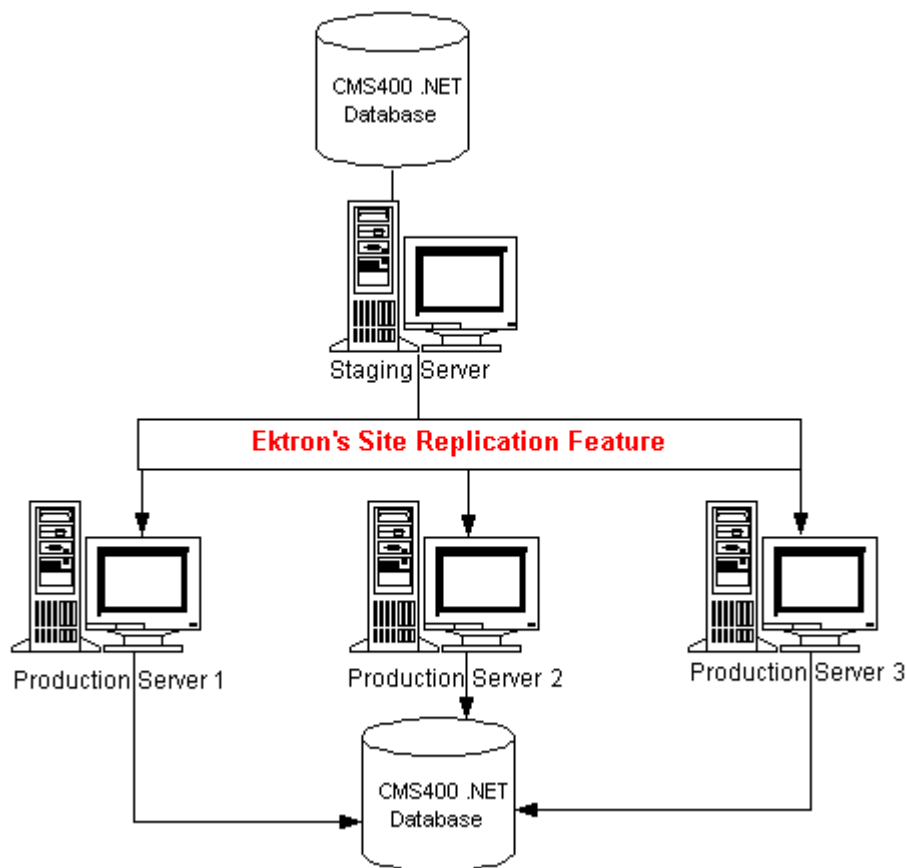
The easiest way to enable Load Balancing involves using Ektron's Site Replication Feature (see ["Using Site Replication for Load Balancing" on page 580](#)). If your site has not purchased that option, an alternative approach involves creating virtual directories and setting up load balance paths (see ["Configuring Load Balancing without Site Replication" on page 581](#)).

See Also:

- ["Using Site Replication for Load Balancing" on page 580](#)
- ["Configuring Load Balancing without Site Replication" on page 581](#)
- ["Ektron CMS400.NET on Three Servers" on page 595](#)

Using Site Replication for Load Balancing

The easiest way to configure **Ektron CMS400.NET** for this setup is illustrated below. Have all content authoring, editing, and review occur on a staging server. Then, when new content is ready to go live, use the Site Replication feature to copy content from staging to production server.



For more information about Site Replication, see ["Site Replication"](#) on page 528.

Configuring Load Balancing without Site Replication

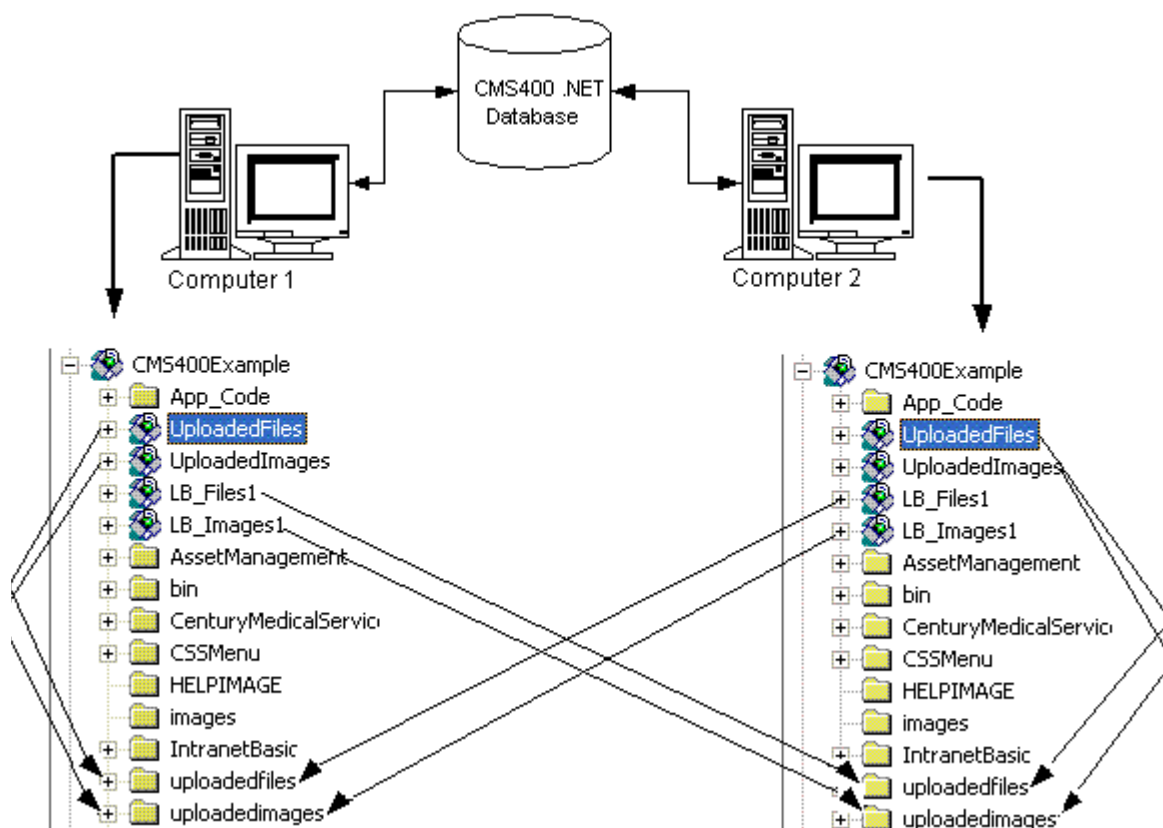
If your site has not purchased Site Replication software, enabling load balancing requires additional set-up outside of Ektron CMS400.NET. You need to perform three tasks.

Instructions are provided for a configuration that involves both two and three Web servers.

Task	Directions for 2 Web Servers	Directions for 3 Web Servers
1. Set up Ektron CMS400.NET on multiple Web servers, sharing one database	"Set Up Two Ektron CMS400.NET Web Sites" on page 583	"Setting Up Multiple Web Sites" on page 596
2. Create virtual directories pointing to folders to which images and files are uploaded	"Set Up Virtual Directories for Two Web Sites" on page 584	"Setting Up Virtual Directories for Three Sites" on page 596
3. Set up load balance paths in Ektron CMS400.NET	"Setting Up Load Balancing for Two Sites" on page 592	"Setting Up Load Balancing for Three Servers" on page 597

Set Up Two Ektron CMS400.NET Web Sites

The following diagram illustrates how to set up IIS consoles for load balancing on two Ektron CMS400.NET Web servers.



As you can see, both servers point to the same database. Also, four virtual directories are set up in each Web server's IIS console.

To run two, identical Ektron CMS400.NET Web sites on two servers, use the same database for both sites. To do this, follow these steps.

1. Install the .exe file for Ektron CMS400.NET on each Web server.

NOTE

Refer to the Ektron CMS400.NET Setup Manual for additional information on performing an install.

2. Select one installed database to use as the master database. Each Web site points to this database for content, users, and load balance paths.
3. Create an ODBC or OLE DB connection to that database. **Ektron CMS400.NET** generates the connection string using values from the web.config file.
4. Edit the web.config file for each Web site to use that connection string.

If performed correctly, each Ektron CMS400.NET Web site on each Web server uses the same database.

Set Up Virtual Directories for Two Web Sites

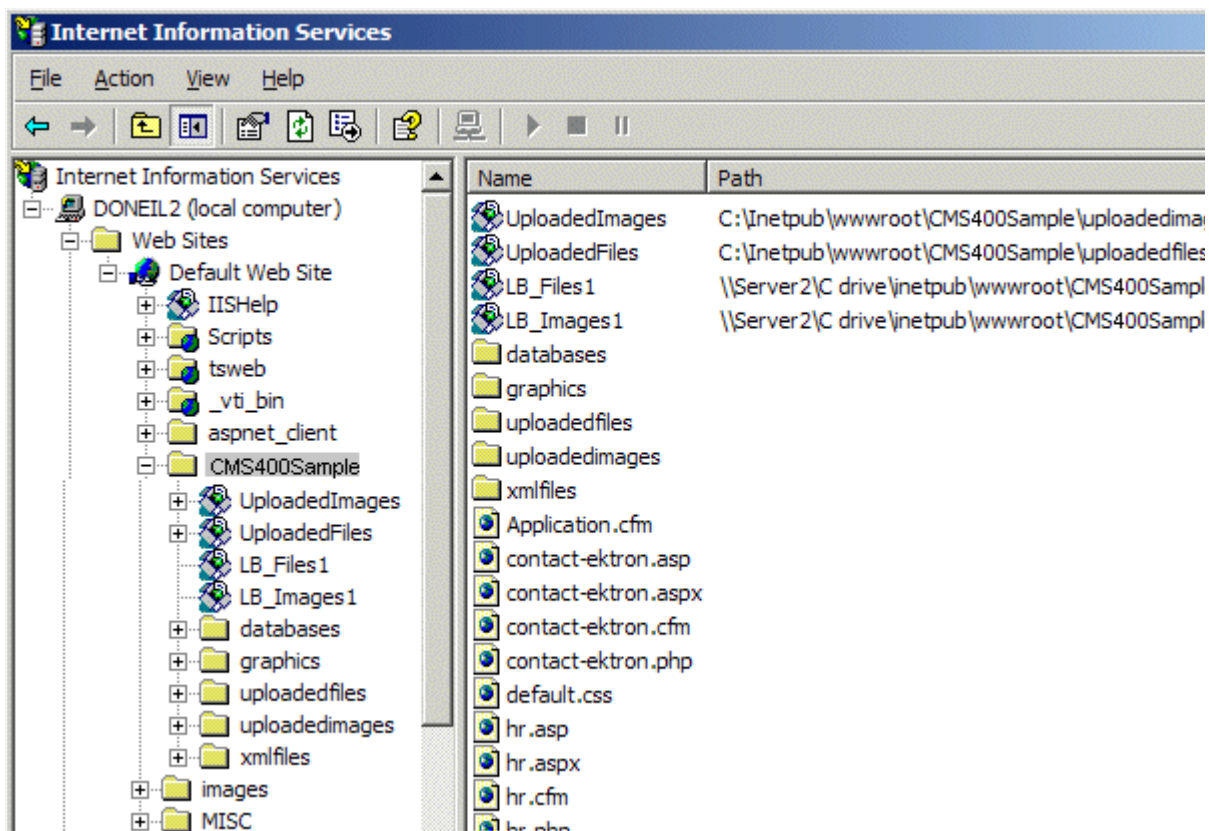
Through Internet Information Services (IIS) on both Web servers, create virtual directories for all image or file folders used with your load balancing model. In addition, change the default `UploadedImages` and `UploadedFiles` directories to virtual directories.

For our example, create the following virtual directories on both Web servers.

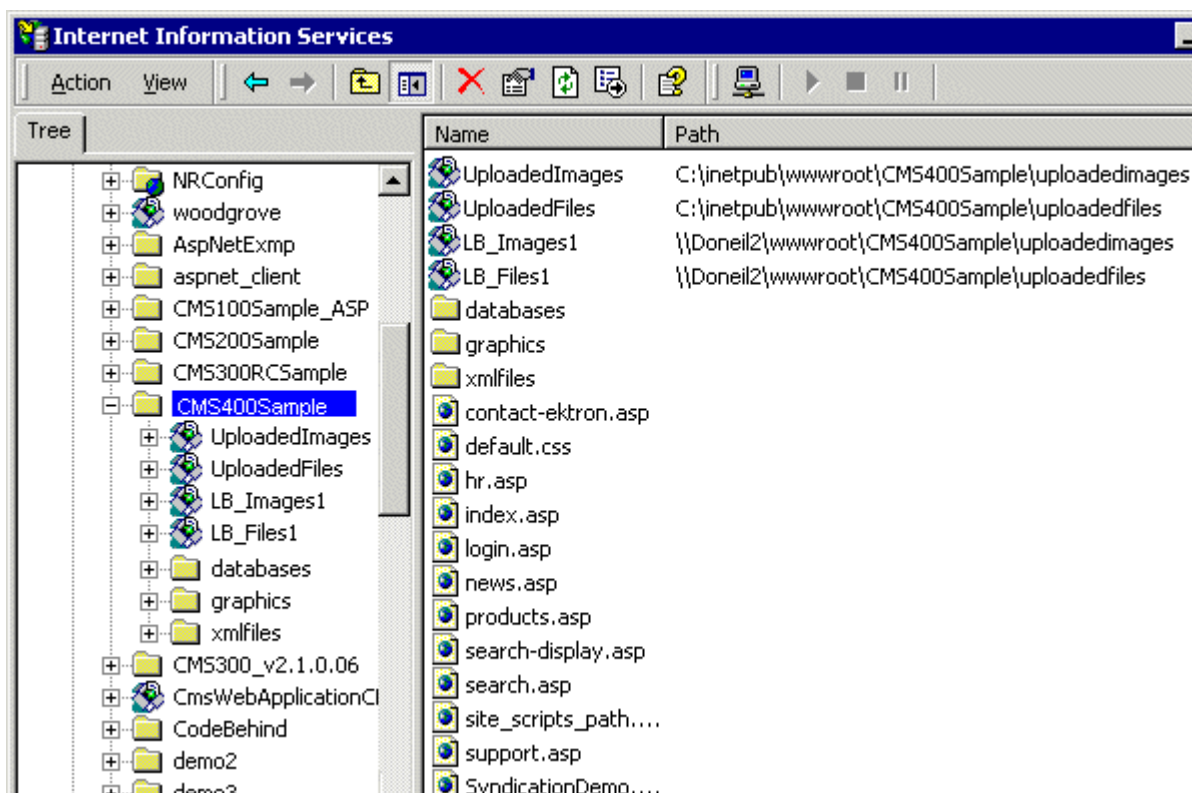
Virtual Directory	Points to
UploadedImages	Default UploadedImages folder installed by Ektron CMS400.NET on the Web Server.
UploadedFiles	Default UploadedFiles folder installed by Ektron CMS400.NET on the Web server.
LB_Images1	UploadedImages folder installed on the second Ektron CMS400.NET Web server.
LB_Files1	UploadedFiles folder installed on the second Ektron CMS400.NET Web server.

These four identical, virtual directories must exist in the IIS console for each Web server in your load balancing model. Below is an illustration of how to configure the machines.

IIS on Computer1



IIS on Computer2



Why Must Virtual Directory Names Be Identical?

Virtual directory names must be identical because load balance paths are stored in one database. IIS resolves the path to the virtual directory stored on the server being used.

For example, a load balance path is called `LB_Images1`. Ektron CMS400.NET talks to IIS and resolves the path for the virtual directory `LB_Images1`, which happens to be

```
\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages.
```

However, if the Web site is accessed from another Web server, the load balance path `LB_Images1` points to the physical directory

```
\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages.
```

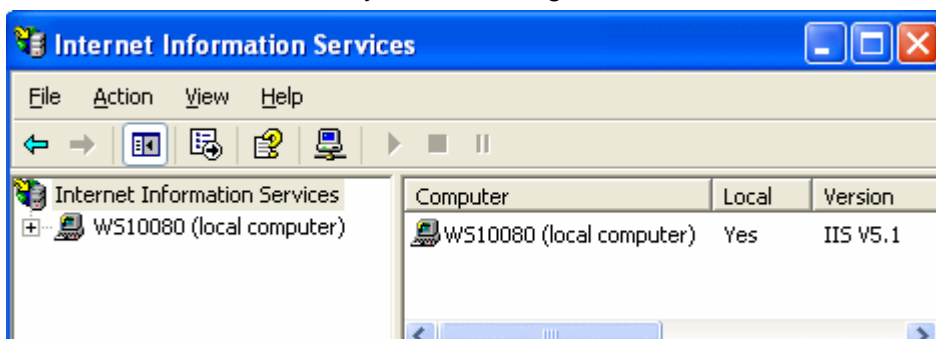
IMPORTANT!

In order for the load balancing model to work correctly, the virtual directories on each Web server must be identical!

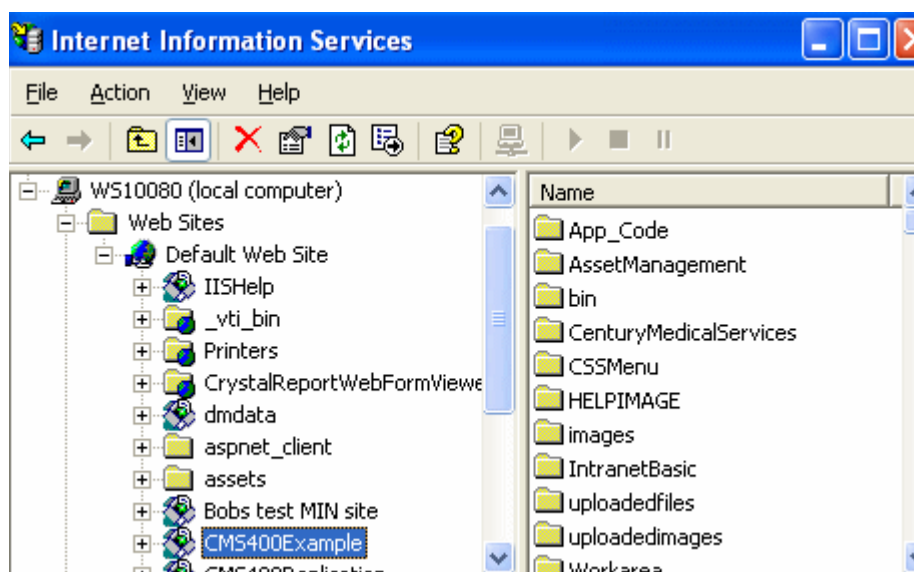
Creating a Virtual Directory

This section explains the steps needed to create a virtual directory in IIS.

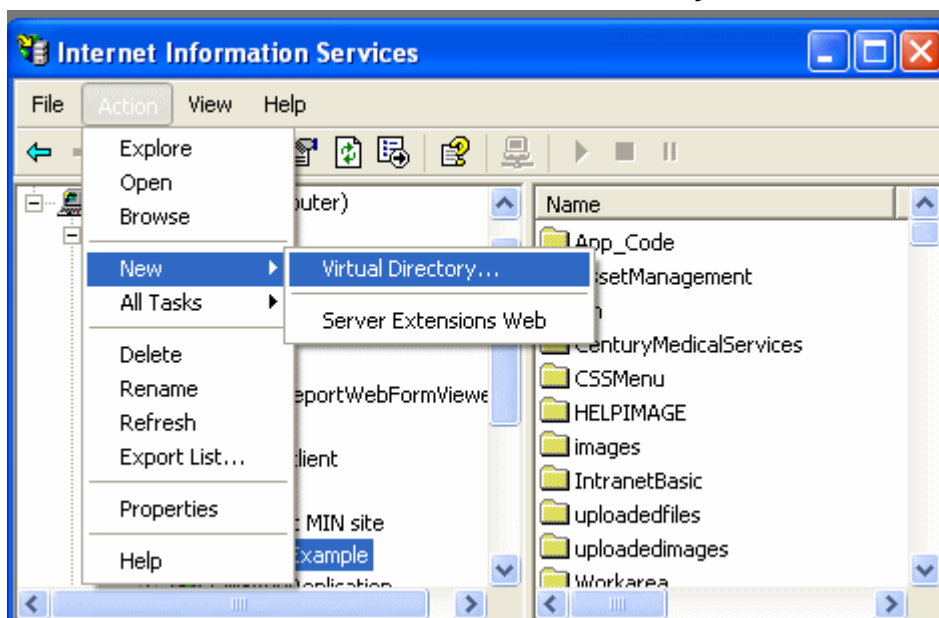
1. Access your IIS management console.



2. In the folder tree on the left side of the console, navigate to the Ektron CMS400.NET Site root folder. In this case, it is CMS400.NETSample.



3. In the toolbar at the top of the screen, follow the path **Action > New > Virtual Directory...**

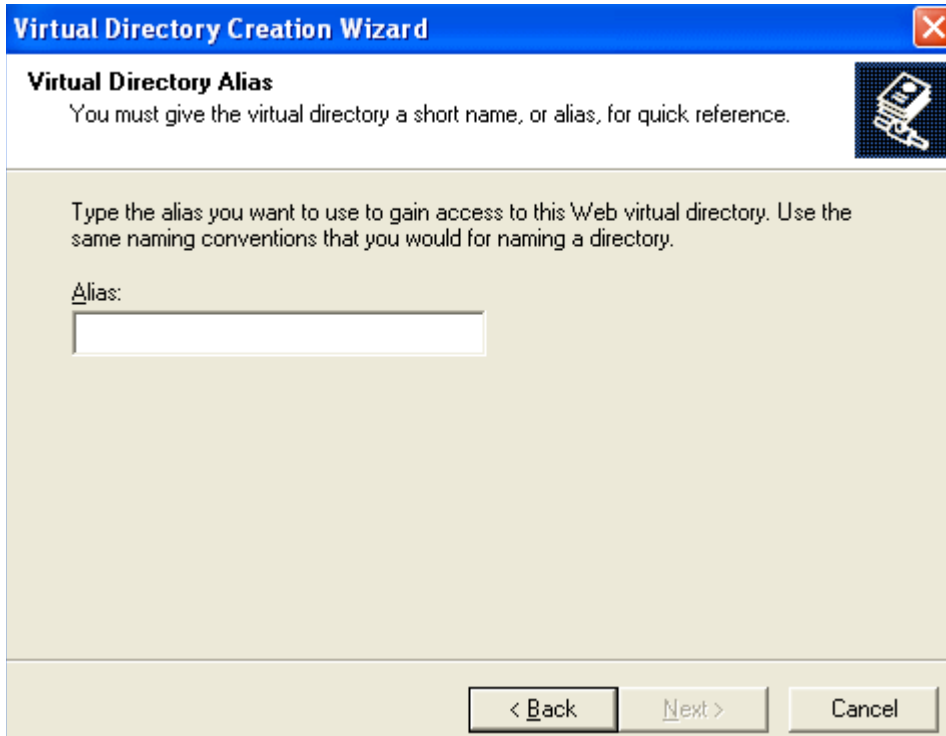


4. The Virtual Directory Creation Wizard is displayed.



5. Click **Next** to proceed.

6. The Virtual Directory Alias screen is displayed.

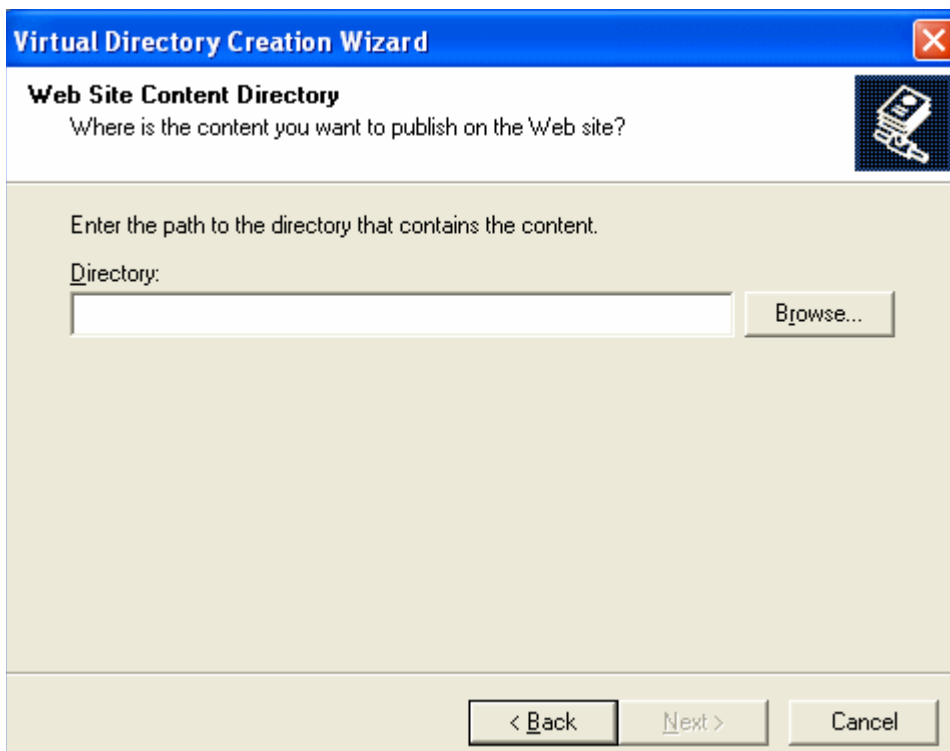


The screenshot shows a Windows-style dialog box titled "Virtual Directory Creation Wizard". The main heading is "Virtual Directory Alias". Below the heading, it says "You must give the virtual directory a short name, or alias, for quick reference." To the right of this text is a small icon of a floppy disk with a document. Below the instruction, there is a text box labeled "Alias:" with a cursor inside. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

7. Enter an alias for the virtual directory. For example, **LB_Images1**. This name is used to reference the virtual directory in Ektron CMS400.NET.

8. Click **Next**.

9. The Web Site Content Directory screen is displayed.



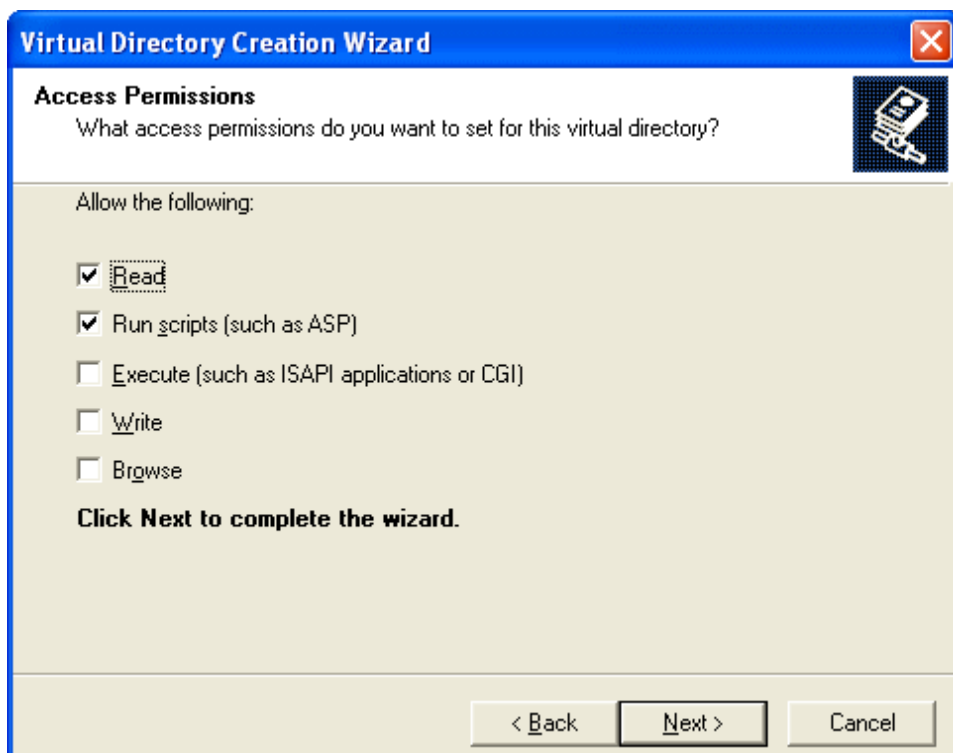
The screenshot shows a Windows-style dialog box titled "Virtual Directory Creation Wizard" with a blue header bar. Below the title bar, the text "Web Site Content Directory" is displayed in bold. Underneath, a question asks "Where is the content you want to publish on the Web site?". To the right of this text is a small icon of a floppy disk. Below the question, a prompt says "Enter the path to the directory that contains the content." followed by the label "Directory:". There is a text input field for the path and a "Browse..." button to its right. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

10. Enter the path to the directory to be used for the virtual directory, or click the **Browse** button to locate it.

NOTE The path is constructed using \\{ComputerName}\{FilePath} format.

11. Click **Next** to continue.

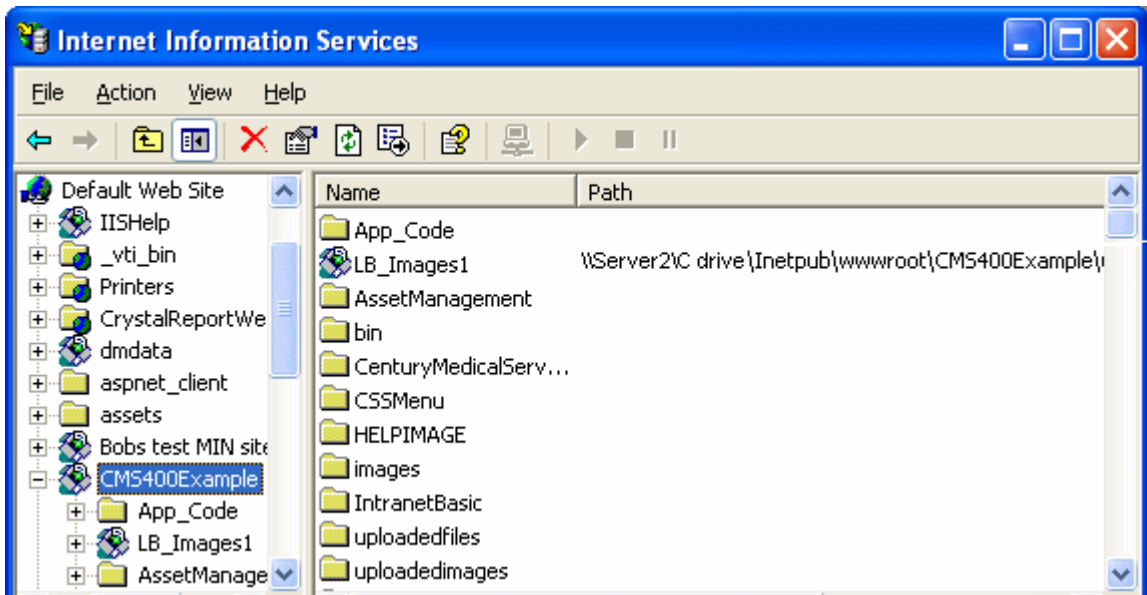
12. Check off permissions you want to allow for the virtual folder.



NOTE At a minimum, the IIS user needs read and write permissions.

13. Click **Next** to complete the wizard.
14. A confirmation notifies you that you have created a virtual directory. Click the **Finish** button.

15. The IIS console is displayed with the virtual directory added to the specified location.



16. Repeat the above steps for each virtual directory you need to create on each Web server running Ektron CMS400.NET.

NOTE Remember, the names of the virtual directories on each server *must* be identical!

Setting Up Load Balancing for Two Sites

After setting up the virtual directories on both Web servers, you are ready to create load balance paths in Ektron CMS400.NET.

Review

Let's review the virtual directories that were created.

Computer1	
Virtual Directory	Points to...
UploadedImages	C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles

Computer1	
Virtual Directory	Points to...
LB_Images1	\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Images
LB_Files2	\\{Computer2}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Files

Computer2	
Virtual Directory	Points to...
UploadedImages	C:\InetPub\wwwroot\CMS400.NETSample\UploadedImages
UploadedFiles	C:\InetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images1	\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Images
LB_Files2	\\{Computer1}\C:\InetPub\wwwroot\CMS400.NETSample\Uploaded Files

Setting Up Load Balance Paths in Ektron CMS400.NET

In this section, set up load balance paths in Ektron CMS400.NET that point to the `LB_Images1` and `LB_Files1` virtual directories created earlier.

NOTE [For additional information about working with load balance paths in Ektron CMS400.NET, refer to "Load Balancing" on page 108.](#)

To add a load balance path in Ektron CMS400.NET, follow these steps.

1. Log in as an administrator to the Web site you set up in ["Set Up Two Ektron CMS400.NET Web Sites" on page 583.](#)

2. Access the Load Balance Settings Screen in the library folder, as described in "Accessing Library Load Balancing Screen" on page 109.

3. Click the Add button (+).
4. The Add a Library Load Balancing Path screen is displayed.

5. Use the following table to help you complete the screen.

Field	Description
Images/Files	Specify if the load balance path folder is for images or files.
Load Balance Path	Enter the folder path.
Make Relative	If the folder (or virtual folder) resides under your Ektron CMS400.NET site root, check off the box to make the path relative to that. Otherwise, remove the check.

6. Click the Save button () to save and add the new load balance folder to the Ektron CMS400.NET library.

The View Library Load Balance Settings screen appears with the changes. Notice the green check, which indicates that IIS on the local Web server resolved the virtual directory and located its physical folder.

7. To further verify the load balance path is working successfully, look at the View Library Load Balance Setting screen in the Workarea for the other Ektron CMS400.NET Web server machine.

View Library Load Balance Settings				
+ - <				
Web Path	Type	Relative	Verified	Physical Path
/cms400sample/uploadedimages/	images	x	✓	c:\inetpub\wwwroot\cms400sa

Notice that the two Web path names are identical, but the physical paths are different. This proves that IIS resolves each differently.

What Now?

After successfully configuring your load balancing model for your Ektron CMS400.NET Web site, you are ready to use it. Now, each time an image or file gets uploaded in your Web site, regardless of the Web server the user is currently working on, the asset is replicated in all folders specified.

Ektron CMS400.NET on Three Servers

This section examines a Web site driven by Ektron CMS400.NET and three Web servers through the following topics.

- "Setting Up Multiple Web Sites" on page 596
- "Setting Up Virtual Directories for Three Sites" on page 596
- "Setting Up Load Balancing for Three Servers" on page 597

Setting Up Multiple Web Sites

To run an identical Ektron CMS400.NET Web site on three machines, you must use the same database for each site. To do this:

1. Install the Ektron CMS400.NET .exe file on each Web server that will be part of the Web site.

NOTE

[Refer to the Ektron CMS400.NET Setup Manual for additional information on performing an install.](#)

2. Identify one installed database as your master database. Each Web site points to this database for content, users, and load balance paths.
3. Create an ODBC or OLE DB connection to that database,
4. Edit the web.config file for each Web site to use that DSN, Provider string, or file string.

If performed correctly, each Ektron CMS400.NET Web site on each Web server uses the same database.

Setting Up Virtual Directories for Three Sites

Through Internet Information Services (IIS) on all three Web servers, create virtual directories for each image or file folder to be used with your load balancing model. In addition, Ektron recommends changing the default `UploadedImages` and `UploadedFiles` directories to virtual directories.

For our example, we create virtual directories on all Ektron CMS400.NET Web servers.

Virtual Directory	Description
UploadedImages	Virtual directory that points to the default UploadedImages folder installed by Ektron CMS400.NET on the Web Server.
UploadedFiles	Virtual directory that points to the default UploadedFiles folder installed by Ektron CMS400.NET on the Web server.
LB_Images1	Virtual directory that points to the UploadedImages folder installed on the second Ektron CMS400.NET Web server.

Virtual Directory	Description
LB_Files1	Virtual directory that points to the UploadedFiles folder installed on the second Ektron CMS400.NET Web server.
LB_Images2	Virtual directory that points to the UploadedImages folder installed on the third Ektron CMS400.NET Web server.
LB_Files2	Virtual directory that points to the UploadedFiles folder installed on the third Ektron CMS400.NET Web server.

These four identical virtual directories must exist in the IIS console for each Web server machine in your load balancing model.

Creating a Virtual Directory

See ["Creating a Virtual Directory" on page 587](#)

Setting Up Load Balancing for Three Servers

After setting up virtual directories on all Web servers, you're ready to create load balance paths in Ektron CMS400.NET.

Review

Before we begin, let's review the virtual directories that have been created.

:

Computer1	
Virtual Directory	Points to...
UploadedImages	C:\inetpub\wwwroot\CMS400.NETSample\UploadedImages
UploadedFiles	C:\inetpub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images1	\\{Computer2}\C:\inetpub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files1	\\{Computer2}\C:\inetpub\wwwroot\CMS400.NETSample\UploadedFiles

Computer1	
Virtual Directory	Points to...
LB_Images2	\\{Computer3}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files2	\\{Computer3}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedFiles

Computer2	
Virtual Directory	Points to...
UploadedImages	C:\inetPub\wwwroot\CMS400.NETSample\UploadedImages
UploadedFiles	C:\inetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images1	\\{Computer1}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files1	\\{Computer1}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images2	\\{Computer3}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files2	\\{Computer3}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedFiles

Computer3	
Virtual Directory	Points to...
UploadedImages	C:\inetPub\wwwroot\CMS400.NETSample\UploadedImages
UploadedFiles	C:\inetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images1	\\{Computer1}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedImages
LB_Files1	\\{Computer1}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedFiles
LB_Images2	\\{Computer2}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedImages

Computer3	
Virtual Directory	Points to...
LB_Files2	\\{Computer2}\C:\inetPub\wwwroot\CMS400.NETSample\UploadedFiles

Setting Up Load Balance Paths in Ektron CMS400.NET

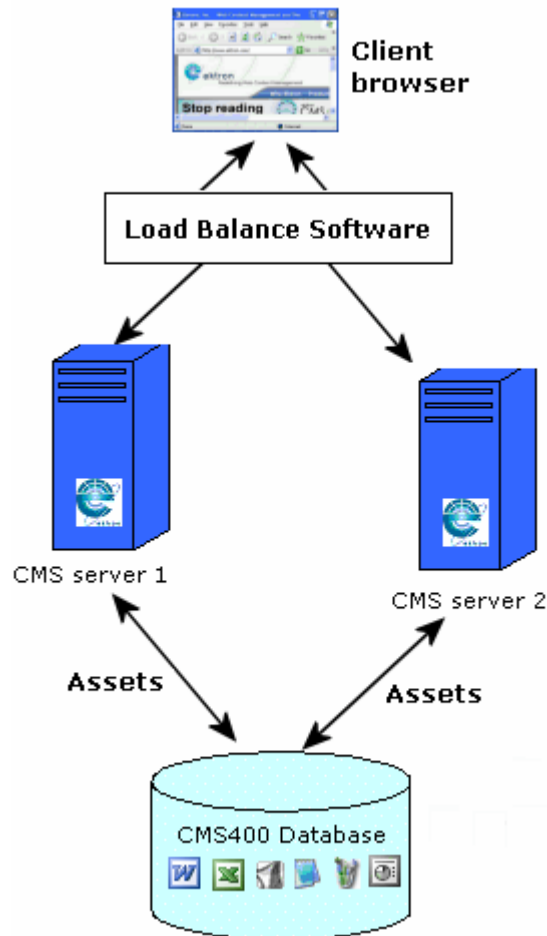
See ["Setting Up Load Balance Paths in Ektron CMS400.NET" on page 593](#)

What Now?

After you configure your load balancing model for your Ektron CMS400.NET Web site, you are ready to use it. Now, each time an image or file gets uploaded in your Web site, regardless of the Web server the user is working on, assets are replicated in all folders specified in Ektron CMS400.NET.

Load Balancing Assets

Ektron CMS400.NET lets you balance requests to view or work with *assets* among two or more servers. To accomplish this, **Ektron CMS400.NET** stores the assets in the database. Because they are in the database, the assets are equally available to all servers.



The load balance software uses a service that constantly checks to see if all database assets also exist on each server's file system. If an asset does not exist in a file system, it is copied from the database to the file system. Once there, the asset is available for requests to work with it. The load balance software determines which server is best suited to meet each request.

There is no limit to the number of servers or databases that can be load balanced.

Setting up Load Balancing

To set up load balancing for assets, you need to update the Ektron.ASM.EktronServices.exe.config, AssetManagement.config and web.config files.

Updating the Ektron.ASM.EktronServices.exe.config File

1. Within each Web server, open the Ektron.ASM.EktronServices.exe.config file, located in C:\Program Files\Ektron\EktronServicesSetup.
2. Within <connectionStrings>, identify database name at the add name element
<connectionStrings> <add name="CMSSite1"
3. Within the ServiceProviders element, identify the database again for both LoadBalanceRead and LoadBalanceWrite (see example below).

```
<serviceProviders>
  <add name="LoadBalanceRead"
type="Ektron.ASM.EktronServices.LoadBalanceRead.LoadBalanceReadService,
Ektron.ASM.EktronServices" IntervalSeconds="15" Port="6060" Database="CMSSite1" />
  <add name="LoadBalanceWrite"
type="Ektron.ASM.EktronServices.LoadBalanceWrite.LoadBalanceWriteService,
Ektron.ASM.EktronServices" Port="6060" Database="CMSSite1" ServerCount="2" />
</serviceProviders>
```

4. At the connectionString element, enter database connection information. An example is provided in the file.

```
"connectionString="server=pdq;database=cmsLoad;Integrated
Security=false;user=devin;pwd=dunkin" />
```

5. At the ServerCount element, enter the number of servers in the load balance configuration.

```
<add name="LoadBalanceWrite"
type="Ektron.ASM.EktronServices.LoadBalanceWrite.LoadBalanceWriteService,
Ektron.ASM.EktronServices" Port="6060" Database="CMSSite1" ServerCount="2" />
```

6. Repeat steps 1 through 5 for each Web server.

IMPORTANT!

The Ektron.ASM.EktronServices.exe.config file settings must be the same for all servers in the load balance configuration. You can either copy the file from one server to another, or be very careful to set the same values in all versions of the file.

Updating the AssetManagement.config File

7. Within each site's root folder, open the AssetManagement.config file. To enable load balancing, set the value of the `LoadBalanced` element to **1**.

Updating the web.config File

8. Within each site's root folder, open the web.config file. To enable load balancing, make sure the `httpHandlers` element is not commented out. (By default, `httpHandlers` is commented out.)

`httpHandlers` should look like below.

```
<httpHandlers>
  <add verb="*" path="*/Assets/*" type="Ektron.ASM.FileHandler.AssetHttpHandler"/>
  <add verb="*" path="*.asmx" data-bbox="268 318 506 329"/>
```

Additional elements not shown.....

```
</httpHandlers>
```

9. From each server in the load balance cluster, sign on to **Ektron CMS400.NET**. This action sets up the load balance software in the database.

URL Aliasing

Aliasing is an **Ektron CMS400.NET** feature that lets you change the name of your Web site's pages. By default, **Ektron CMS400.NET** Web pages have the following format:

Web Site Address	Template	Content Block ID #	Language Identifier
http://www.yoursite.com/	news.asp	id=9	&LangType=1036

See Also: "Forming URLs For Ektron CMS400.NET Documents" on page 52

Sometimes, you want to change a page's name. The Aliasing feature offers two ways to do this:

- **Ektron CMS400.NET** can automatically change each page's name to a format that search engines more easily recognize. This is called *Automatic Aliasing*.
- You can manually change the name of any page to whatever you wish. For example, you can change the name of your technical support page to `http://www.YourEktronwebsite.com/help.htm` from `http://www.YourEktronwebsite.com/help.aspx?id=27`. This is called *Manual Aliasing*.

NOTE

When using Manual Aliasing, you cannot alias the root of your Web site (for example, `www.yourEktronWebsite.com`). You can, however, alias everything after that.

This chapter explains how to alias pages on your Web site through the following topics.

- "Automatic vs. Manual URL Aliasing" on page 604
- "Automatic URL Aliasing" on page 604
- "Manual Aliasing" on page 607

Automatic vs. Manual URL Aliasing

Automatic URL Aliasing allows you to create a URL that does not have a URL parameter. This URL aliases the URL that contains parameters found in a regular Ektron CMS400.NET URL, such as ?id=43. With Automatic URL Aliasing, you can alias all content at once. For more information on Automatic URL Aliasing, see ["Automatic URL Aliasing" on page 604](#).

Manual URL Aliasing lets you choose the URL and extension that you would like to use. With Manual URL Aliasing, you must assign an alias to each content item individually. You can also assign several aliases to any content item then pick one to be the primary alias. For more information on Manual URL Aliasing, see ["Manual Aliasing" on page 607](#).

Automatic URL Aliasing

People looking for information on your Web site typically use search engines (such as Google.com) to find pages with the desired content. On rare occasions, some older search engines work better without the URL parameters that make up an **Ektron CMS400.NET** Web page name.

If this becomes a problem, use the Automatic URL Aliasing feature, which creates a page name that search engines easily recognize. The new name includes the template and the page's ID values.

When you use the Automatic URL Aliasing feature, **Ektron CMS400.NET** makes the following changes.

- A delimiter of `ekt` indicates the start of each parameter
- URL parameters follow each delimiter

Here is an example of aliasing content.

Original URL

```
/400Intranet/mycalendars.aspx?id=2
```

Aliased version

/400Intranet/mycalendars_ektid2.aspx

Enabling Automatic URL Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it.

NOTE Before editing your web.config file, you should close all open browsers. In some instances, you may need to do an IIS reset.

1. Open the web.config file, located in your Web site's root folder.
2. Change the value of `ek_RedirectorInstalled` to **True**.
3. Enable the `httpHandlers` element. To do so, uncomment the following tags by removing all dashes and the exclamation point (!):

```
<!--httpHandlers> </httpHandlers-->
```

The tags are separated by several lines that look like this:

```
<add verb="*" path="*.gif" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter" />
```



NOTE For more information on the `<httpHandlers>` tags, see "The `<httpHandlers>` Tags in Web.config" on page 616.

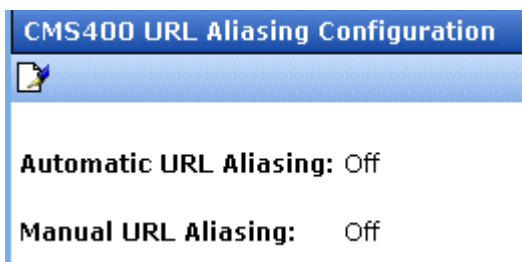
4. Save web.config.

Activating/Deactivating the Aliasing Feature

To activate the automatic aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

NOTE If you do not see a **URL Aliasing** option under **Configuration**, see "Enabling Automatic URL Aliasing" on page 605.

The screen indicates if automatic aliasing is currently on or off. To change its state, click the Edit button () , check or uncheck the box, and click the Save button ().



If **Automatic Aliasing** is turned on and you uncheck it, your page URLs return to their original format (see "[Sample Quicklinks Folder with URL Aliasing Turned Off](#)" on page 606).

Effect of Activating Automatic URL Aliasing

When you enable automatic URL aliasing, the feature updates every Quicklink in your **Ektron CMS400.NET** library to the new format. This may take a few moments.

Sample Quicklinks Folder with URL Aliasing Turned Off

: "CenturyMedical\quicklinks"			
ks	←	English (U.S.)	?
	ID	Date Modified	URL Link
lower middle	86	2/7/2005 4:12:37 PM	/CMS400Example/centurymedical/index.aspx?id=45
top (home)	87	2/7/2005 4:12:38 PM	/CMS400Example/centurymedical/index.aspx?id=46
	85	5/29/2005 1:47:40 PM	/CMS400Example/centurymedical/index.aspx?id=44
ain content	88	7/15/2005 2:58:57 PM	/CMS400Example/centurymedical/index.aspx?id=47
	84	2/7/2005 4:12:36 PM	/CMS400Example/centurymedical/index.aspx?id=43
ent	91	3/8/2005 11:52:46 AM	/CMS400Example/centurymedical/index.aspx?id=50
ent demo	90	6/29/2005 3:44:04 PM	/CMS400Example/centurymedical/index.aspx?id=49

Sample Quicklinks Folder with URL Aliasing Turned On

:: "CenturyMedical\quicklinks"			
ks	←	English (U.S.)	?
	ID	Date Modified	URL Link
lower middle	86	2/7/2005 4:12:37 PM	/CMS400Example/centurymedical/index_ektid45.aspx
top (home)	87	2/7/2005 4:12:38 PM	/CMS400Example/centurymedical/index_ektid46.aspx
	85	5/29/2005 1:47:40 PM	/CMS400Example/centurymedical/index_ektid44.aspx
ain content	88	7/15/2005 2:58:57 PM	/CMS400Example/centurymedical/index_ektid47.aspx
	84	2/7/2005 4:12:36 PM	/CMS400Example/centurymedical/index_ektid43.aspx
tent	91	3/8/2005 11:52:46 AM	/CMS400Example/centurymedical/index_ektid50.aspx
tent demo	90	6/29/2005 3:44:04 PM	/CMS400Example/centurymedical/index_ektid49.aspx

The aliasing feature does not review Quicklinks embedded in your content -- these maintain their original format. When a user or site visitor is navigating through **Ektron CMS400.NET**, either format works.

Manual Aliasing

When using manual aliasing, you choose content then assign a different URL to it. From then on, the content can be identified either by its original URL (assigned automatically by **Ektron CMS400.NET**) or its alias.

When assigning an alias, choose the name you want users to see as your URL. In the example below, the page name changed from `/CMS400Example/index.aspx` to `/CMS400Example/Launch.htm`. `Launch.htm` is the alias.

Before Manual URL Aliasing

Library Folder: "Content\quicklinks"

English (U.S.)

Title	ID	Date Modified	URL Link
Contact Ektron	20	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=1
<u>Home Page Content</u>	7	27-Dec-2004 11:11:56 AM	/CMS400Sample/index.aspx
Introducing the RC Redstar	29	04-Dec-2003 10:26:41 AM	/CMS400Sample/index.aspx?id=1
<u>Login Information</u>	8	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=1
Season's Greetings	30	04-Dec-2003 10:26:41 AM	/CMS400Sample/index.aspx?id=1

After Manual URL Aliasing

Library Folder: "Content\quicklinks"

English (U.S.)

Title	ID	Date Modified	URL Link
Contact Ektron	20	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=1
<u>Home Page Content</u>	7	27-Dec-2004 10:50:04 AM	/CMS400Sample/Launch.htm
Introducing the RC Redstar	29	04-Dec-2003 10:26:41 AM	/CMS400Sample/index.aspx?id=1
<u>Login Information</u>	8	05-Sep-2002 05:46:07 PM	/CMS400Sample/index.aspx?id=1
Season's Greetings	30	04-Dec-2003 10:26:41 AM	/CMS400Sample/index.aspx?id=1

This section explains manual aliasing through the following subtopics.

- "Benefits of Manual URL Aliasing" on page 609
- "Enabling Manual Aliasing" on page 609
- "Activating/Deactivating Manual Aliasing" on page 616
- "Permissions for Manual Aliasing" on page 617
- "Adding a Base Reference to a Template" on page 618
- "Assigning a Manual URL Alias" on page 618
- "Editing a Manual URL Alias" on page 622
- "Removing a Manual URL Alias" on page 623

Benefits of Manual URL Aliasing

Manual URL Aliasing lets you completely alias a static or dynamic site. Benefits include:

- You can make your site more user-friendly by creating “human readable” URLs (for example, `/ourcompany.html` is readable, while `company.aspx?id=1` is not).
- If you have a PHP site, you can alias all php pages and use the same Query String names to pass the needed info to the new ASPX pages.

NOTE

Any query strings appended to an aliased page pass to the ASPX page and may be used if necessary.

- If you have a static Web site (for example, all HTML pages) that is indexed in a search engine, you can alias your whole site and gain complete content management without affecting your search engine ranking.
- You can increase your search engine rankings by naming pages according to the context of a specific search term.

Enabling Manual Aliasing

If you do not see a **URL Aliasing** option under **Settings > Configuration**, follow these steps to enable it. First, update the `web.config` file. Next, update IIS Application Mappings.

Updating the Web.config File

1. Close all open browsers. In some instances, you may need to do an IIS reset.
2. Open the `web.config` file, located in your Web site's root folder.
3. Change the value of `ek_RedirectorInstalled` to **True**.

NOTE

You only need to perform step 4 if you want add content with an extension other than those already registered, such as `.aspx`. The **App Mappings** tab on the Application Configuration screen (illustrated below) indicates which extensions are registered on your server.

4. After `ek_RedirectorManualExt`, set a comma-delimited list of Web page extensions for which you will want to create aliased pages. For example, `.aspx,.htm,.html`. By default, `.aspx` is in the list.

You can enter one or more extensions. Each extension must begin with a period, and the last extension must be followed by a comma (,).

5. Enable the `httpHandlers` element. To do so, uncomment the following tags by removing all dashes and the exclamation point (!):

```
<!--httpHandlers> </httpHandlers-->
```

The tags are separated by several lines that look like this:

```
<add verb="*" path="*.gif" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter" />
```

See Also: ["The <httpHandlers> Tags in Web.config" on page 616](#)

6. Save web.config.

NOTE

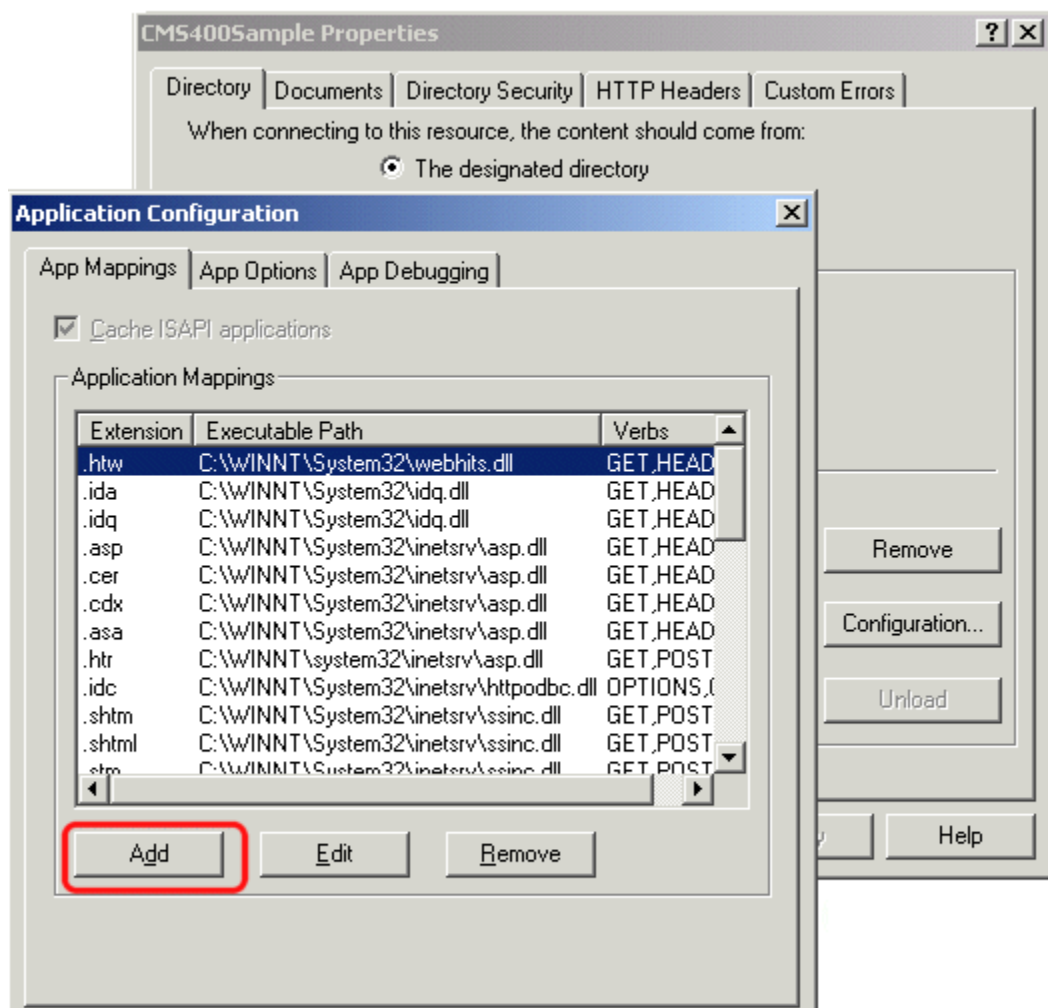
If you are using .aspx pages, you do not need to install the ISAPI filter. The following steps do not need to be performed.

Updating IIS Application Mappings for Windows 2000 and XP

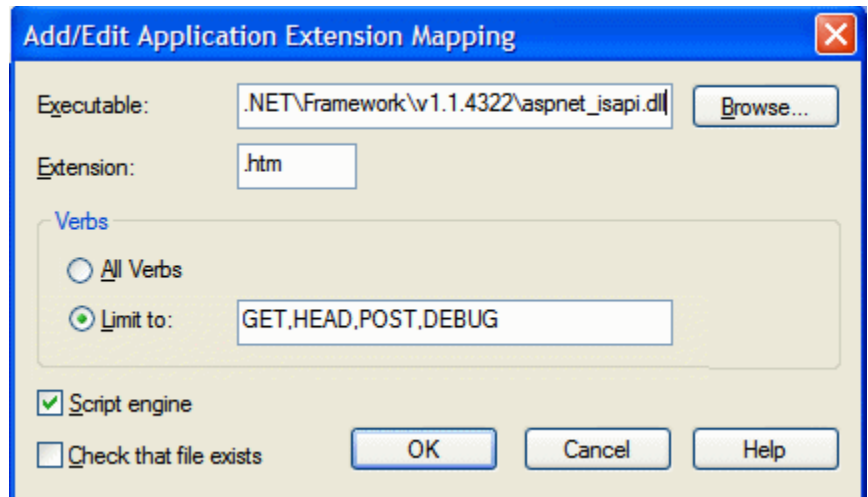
See Also: ["Updating IIS Application Mappings for Windows 2003 Server" on page 614](#)

1. Open IIS, go to the Web site, and right-click **Properties**.
2. Click the **Directory** tab.
3. Click the **Configuration** button.
4. On the **App Mappings** tab, click **Add**.

Windows 2000 or Windows XP



5. The Add/Edit Application Extension Mapping dialog appears.

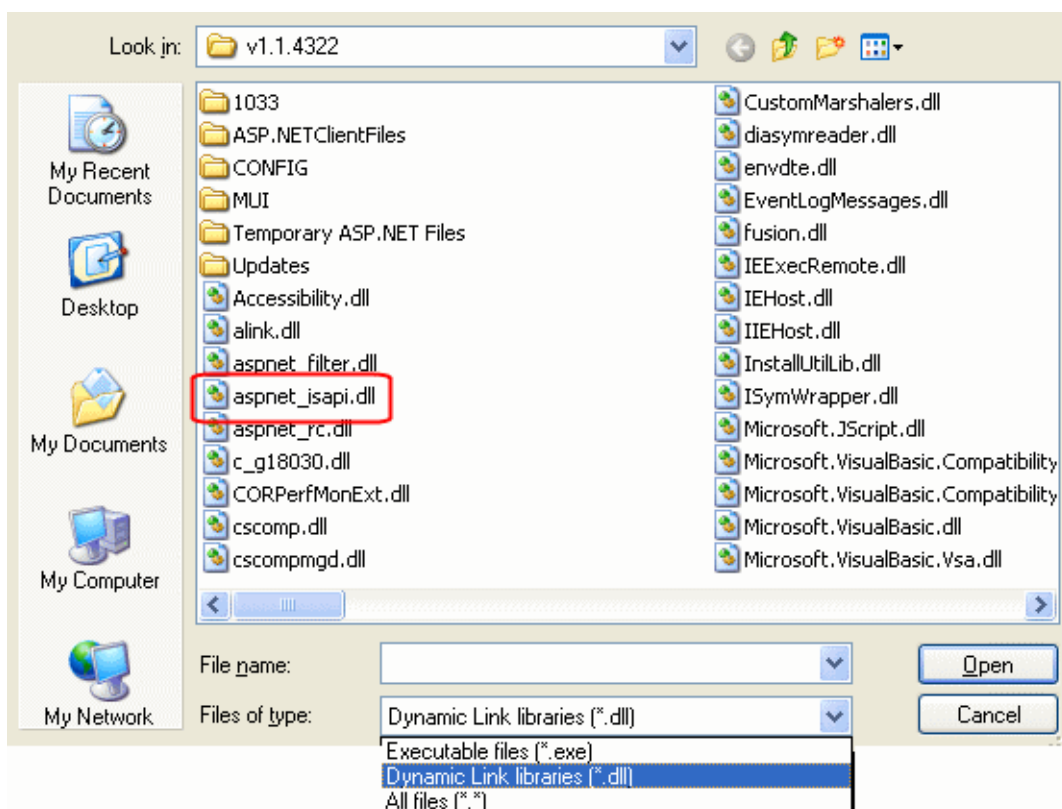


NOTE In the sample dialog box above, the fields and check boxes are filled out. The box should look like this when you finish.

6. In the **Executable** field, browse to the .NET Framework aspnet_isapi.dll file (illustrated below).

NOTE Use the latest version of the asp.net_isapi.dll. The default location is `c:\windows\Microsoft.NET\Framework\latestversion\aspnet_isapi.dll`. In the path, *latestversion* refers to the folder containing the latest version of the .NET framework.

WARNING! IIS sometimes abbreviates the path in the **Executable** field, causing the **OK** button to be grayed out. If the text box does not contain the full path, IIS cannot validate it. To remedy this, click in the **Executable** field. The full path appears, and the **OK** button is active.



NOTE When browsing to the `aspnet_isapi.dll` folder, you may need to change the **Files of Type** dropdown to **.dll** or **all files**. It is set to **.exe** by default.

7. In the **Extension** field, enter characters to allow all extensions.

Server Platform	Your entry in the Extension field
Windows 2000	*.*
Windows XP	.*

8. Under **Verbs**, check **Limit to**. Then, enter **GET, HEAD, POST, DEBUG**.
9. Uncheck **Check** (or **Verify**) that file exists.

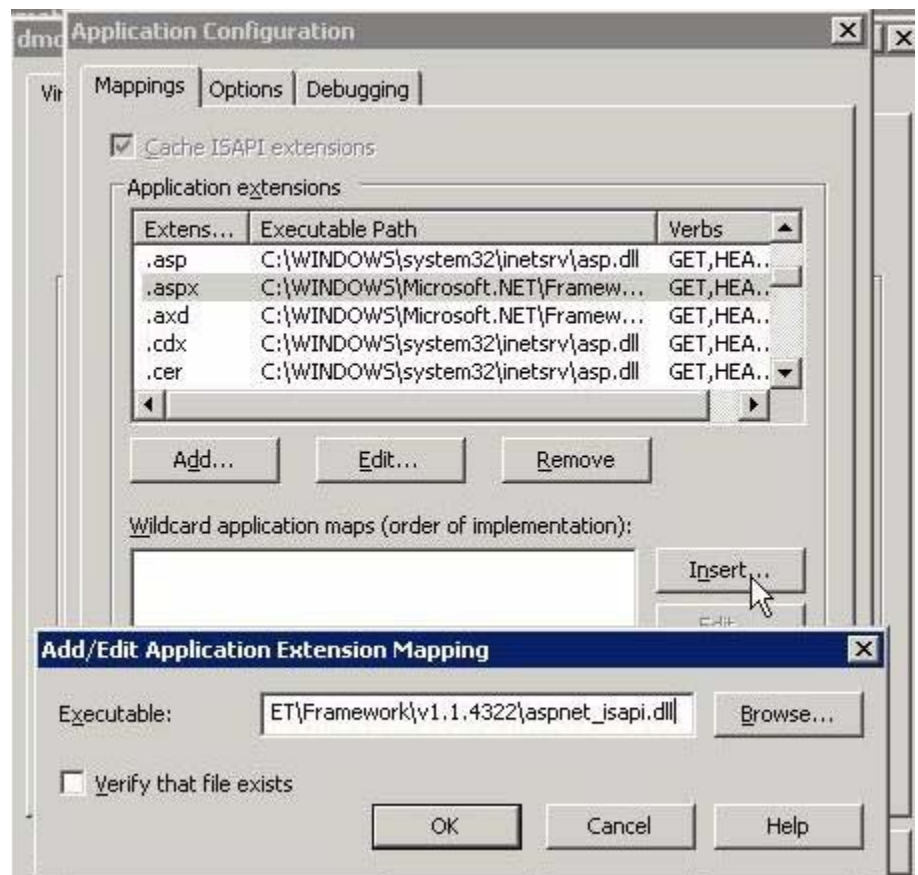
Important! Don't skip step 9!

10. Click **OK**.

Updating IIS Application Mappings for Windows 2003 Server

See Also: "Updating IIS Application Mappings for Windows 2000 and XP" on page 610

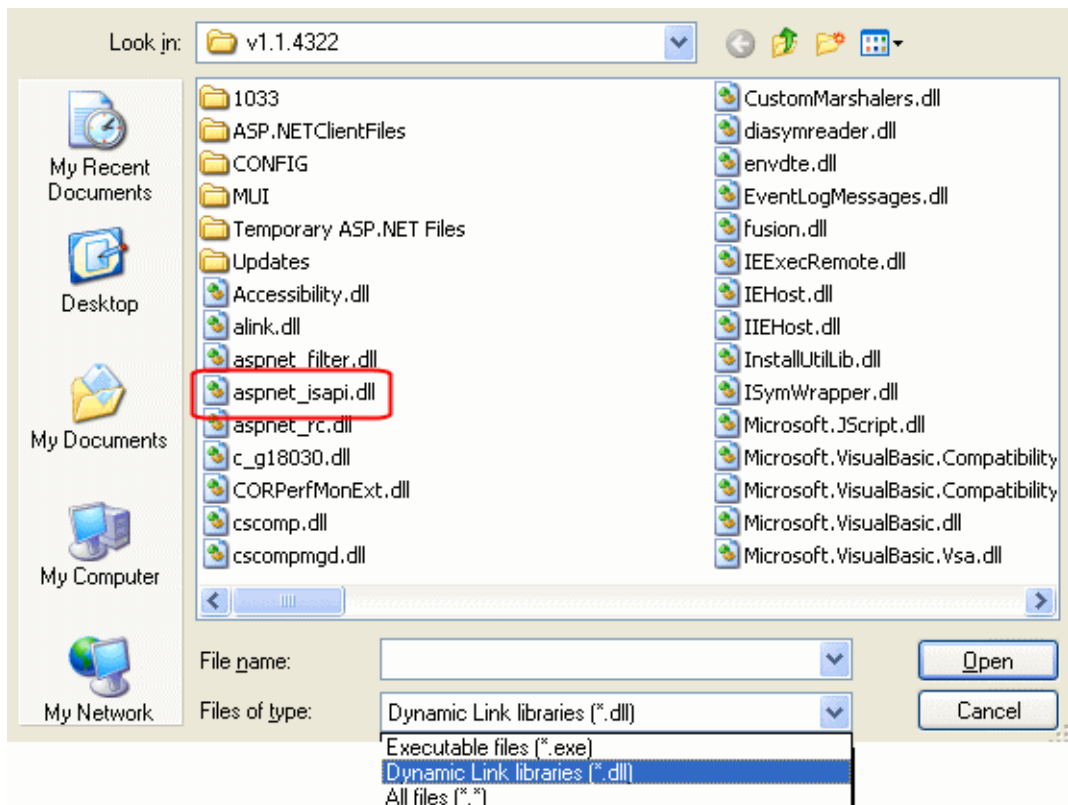
1. Open IIS, go to the Web site, and right click **Properties**.
2. Click the **Directory** tab.
3. Click the **Configuration** button.
4. On the **Mappings** tab, click **Insert**.



5. The Application Extension Mapping dialog appears (see above).
6. In the **Executable** field, use the **Browse** button to navigate to the .NET Framework aspnet_isapi.dll file (illustrated below).

NOTE Use the latest version of the aspnet_isapi.dll. The default location is `c:\windows\Microsoft.NET\Framework\latestversion\aspnet_isapi.dll`. In the path, **latestversion** refers to the v1.1.4322 folder or the folder that contains the latest version.

WARNING! IIS sometimes abbreviates the path in the **Executable** field, causing the **OK** button to be grayed out. If the text box does not contain the full path, IIS cannot validate it. To remedy this, click in the **Executable** field. The full path appears, and the **OK** button is active.



NOTE When browsing to the aspnet_isapi.dll folder, you may need to change the **Files of Type** dropdown to **.dll** or **all files**.

7. Click **OK**.

The <httpHandlers> Tags in Web.config

The <httpHandlers> tags handle the URL Aliasing. Contained in the tags are how to handle various types of extensions.

The only reasons to edit information in this section are:

- You are enabling manual or automatic URL aliasing by uncommenting the <httpHandlers> tags.

Uncomment the tags by removing all dashes and the exclamation point (!):

```
<!--httpHandlers> </httpHandlers-->
```

or

- You are adding an item to your library that has an extension not already on this list. For example, to add a Microsoft Visio drawing to your library, you add the following line:

```
<add verb="*" path="*.vsd" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter" />
```

Add this line before the last line between the tags. In the following example the last line is in red.


```
<add verb="*" path="*.vsd" type="URLRewrite.StaticFileHandler,Ektron.Cms.URLRewriter" />
<add verb="*" path="*" type="URLRewrite.URLRewriter,Ektron.Cms.URLRewriter" />
</httpHandlers>
```

For more information on adding library extensions, see ["Accessing the Library Properties Screen" on page 104](#).

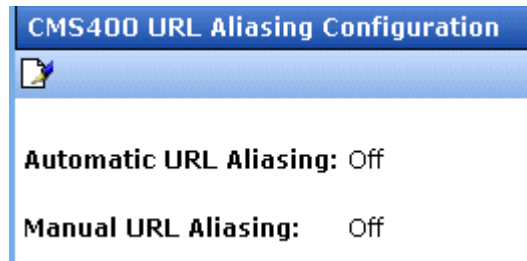
Activating/Deactivating Manual Aliasing

To activate the aliasing feature, follow this path to the URL Aliasing Configuration screen: **Settings > Configuration > URL Aliasing**.

NOTE If you do not see a **URL Aliasing** option under **Configuration**, see ["Enabling Manual Aliasing" on page 609](#).

The screen indicates if Manual Aliasing is currently on or off. To change its state, click the Edit button () , check or uncheck the box, and click the Save button.


See Screen Sample



If Aliasing is turned on and you uncheck it, your page URLs return to their original format (see ["Sample Quicklinks Folder with URL Aliasing Turned Off" on page 606](#)).

Permissions for Manual Aliasing

To give users or groups permission to assign a manual alias to content, follow these steps.

1. Go to the Ektron CMS400.NET Workarea and select **Settings > Roles**.
2. Select **Built-In > System-Wide > Alias-Edit**.
3. The Manage Members for Role: Alias-Edit screen appears.
4. Click the Add button ().
5. Click the check box next to all users and user groups that have permission to manually alias content.



6. Click the Save button ()

See Also: ["Defining Roles" on page 123](#)

Adding a Base Reference to a Template

When aliasing a Web page, you must add a reference to the base URL into the `<Head>` section of the template. Otherwise, any relative links on the page use the alias as the base URL.

For example, you have the file `winners.gif` on a Web page. The page's URL is `http://www.ekexample.com/baseball/team.aspx?id=37`. The alias for this page is `http://www.ekexample.com/2004/worldchamps.aspx`. When the page tries to find `winners.gif`, it looks in the `/2004/` directory. The page should look in the `/baseball/` directory, because that is where the file is located.

Here is the syntax used in the `<Head>`.

```
<BASE HREF="baseURL"
TARGET="WindowName">
```

Here is an example:

```
<HEAD>

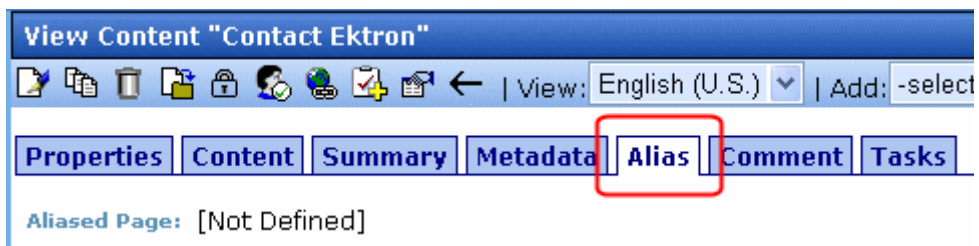
<BASE HREF="http://www.ekexample.com/baseball/">

<HEAD>
```

Assigning a Manual URL Alias

There are two ways to manually assign an alias.


- Use the Page Name Maintenance screen. This method is for administrators only.
- Use the Alias tab in View Content area of the content. This method can be used by content editors or administrators.




Each method is explained below.

Adding a Manual Alias via the Page Name Maintenance Screen

NOTE Make sure you have enabled URL Aliasing and given the administrator's group permissions for aliasing. See "Enabling Manual Aliasing" on page 609. and "Viewing the Users in a User Group" on page 121.


1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button ().
3. The Page Name Maintenance screen appears.

CMS400 Aliased Page Name Maintenance						
						
Alias	Actual	Content Title	Status	ID	Lang	ID P
/CMS400Sample/home.htm	/CMS400Sample/index.aspx?id=30	Test	A	30	1033	✓
/CMS400Sample/home2.htm	/CMS400Sample/index.aspx?id=31	test 2	A	31	1033	✓
/CMS400Sample/ourcompany.htm	/CMS400Sample/home.htm	Test	A	30	1033	✗



The following explains the columns on the screen.

Field	Description
Alias	The URL as it appears aliased.
Actual	The actual URL before aliasing.
Content Title	The title of the content.
Status	The status of the content. See Also: "Content Status" on page 18.

Field	Description
ID	The content's ID number.
Lang ID	The language code for the content. See Also: "Appendix A: List of Supported Languages" on page 696
Primary	The alias a content editor sees when editing an alias via the Alias tab. See Also: "Adding a Manual URL Alias via the Alias Tab" on page 621 ✓ = Primary Alias for that URL

- Click the Add Alias button (). The Add a New Alias screen appears.

Add a new Alias

Alias Name:

/CMS400Example/.htm

Content Block:

[Select A Content Block](#)

Link:

/CMS400Example/

Primary:

☐

Library Quicklink:

☒ Overwrite Existing Quicklink
☐ Do not add Quicklink

- In the **Alias Name** field, choose the name you want to use for an alias.
- Click on **Select a Content Block** to choose content.
- The QuickLink Select window appears.
- Choose content.
- Check the **Primary** box if you want to make this the primary alias.
- Choose a Quicklink option.

- **Overwrite Existing Quicklink** overwrites the existing Quicklink for the content.

WARNING!

When you choose to overwrite an existing Quicklink, you permanently delete it. There is no way to revert back to the old Quicklink. If you want to use the old Quicklink again, you need to add a new one. For more information on creating Quicklinks, see Ektron CMS400.NET User Manual > "Library Folder" > "Quicklinks" "Quicklinks and Forms" on page 229.

- **Do not add Quicklink** does not create a Quicklink for this alias.

11. Click the Save button (.


Adding a Manual URL Alias via the Alias Tab

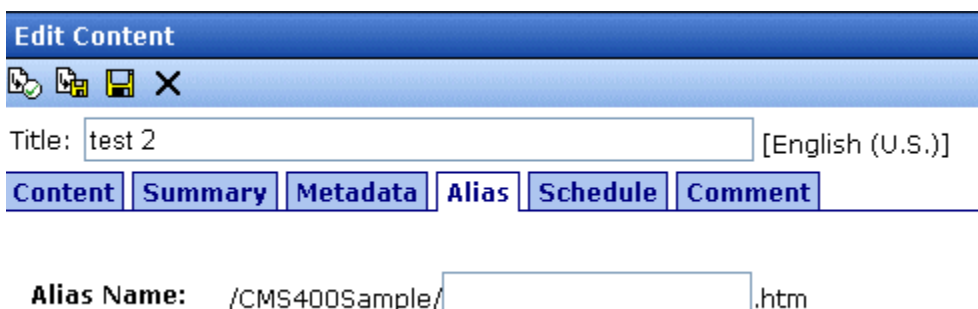
NOTE

Make sure you have enabled URL Aliasing and given the administrator's group permissions for aliasing. For information on Enabling URL Aliasing, see "Benefits of Manual URL Aliasing" on page 609. For information on User Group Permissions, see "Viewing the Users in a User Group" on page 121.

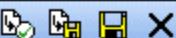
On the Alias tab, **Alias Name** has the message, **[Not Defined]**. There are two reasons this message appears:

- No alias is defined
- An alias is defined in Page Name Maintenance, but it is not set to be a primary alias

1. In the Workarea, click the content you want to work with.
2. Click the Edit button (). The Edit Content screen appears.



Edit Content



Title: [English (U.S.)]

Content **Summary** **Metadata** **Alias** **Schedule** **Comment**

Alias Name: /CMS400Sample/.htm

3. Click the **Alias** tab.


4. In the **Alias Name** field, enter the name you want to use for an alias.
5. Save and publish the content.

NOTE [An alias goes live only after content is published.](#)

Editing a Manual URL Alias



You can edit an alias by going to the Page Name Maintenance screen. This lets you change the alias name and Quicklink properties. You can also change the primary alias if you have more than one for a content item.

To edit a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button ().
3. On Page Name Maintenance screen, click the link you want to edit.
4. The Edit Alias screen appears.


[See Screen Sample](#)

CMS400 Edit Alias




Alias Name:	/CMS400Example/ <input style="width: 150px;" type="text" value="Tim"/> .htm
Content Block:	<input style="width: 150px;" type="text" value="Tim Smith"/>
Link:	/CMS400Example/ <input style="width: 150px;" type="text" value="contacts.aspx?id=35&LangType=1033"/>
Primary:	<input type="checkbox"/>
Library Quicklink:	(Overwrite Existing Quicklink)

NOTE [When editing an Alias, you can only change the **Alias Name** and **Primary** fields.](#)

5. Make any changes. To learn about the fields, see ["Adding a Manual Alias via the Page Name Maintenance Screen" on page 619](#).
6. Click the Save button ().

Removing a Manual URL Alias

To remove a Manual URL Alias, follow these steps.

1. Go to **Workarea > Settings > Configuration > URL Aliasing**.
2. Click the Page Name Maintenance button ().
3. On Page Name Maintenance screen, click the **Remove button** ().
4. Check the boxes of the aliases you would like to remove.
5. Click the Delete button ().
6. Click **OK** to confirm.

email Features

Configuring SMTP Server

For information about configuring Microsoft's SMTP service for your Ektron CMS400.NET Web server, please refer to Configuring Email Notifications, in the Ektron CMS400.NET Setup Manual.

Automatic eMail Notification

Ektron CMS400.NET has an automated email system that sends emails to the proper users when an action has been, or needs to be, performed. Emails are generated when any of the following actions takes place.

email sent to	When content is
Next approver	Submitted to be published
Next approver	Submitted to be deleted
Author	Published to Web site
Author	Declined to be published or deleted

In order for users to be notified of these actions, the following criteria must be met:

- Valid system email address
- Enabled email notification
- User email address
- User email notification enabled

These values are set in the Edit User screen. See Also: ["Managing Users" on page 114](#)

The Tasks feature also has automatic email notification. For more information, see "Email Notification" on page 398.

Content of Automatic email

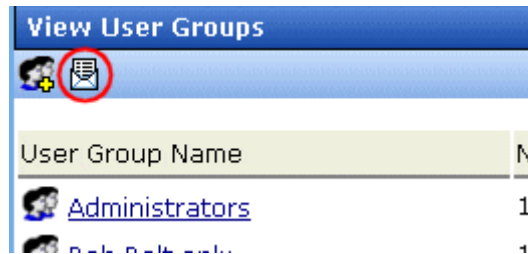
The automatic emails are stored in and received from the database. Each email consists of one string for the subject and one for the body. **Ektron CMS400.NET** does not currently support HTML emails, but the messages are fully customizable. To learn about customizing them, see Customizing **Ektron CMS400.NET** emails in the **Ektron CMS400.NET** Setup Manual.

Instant eMail

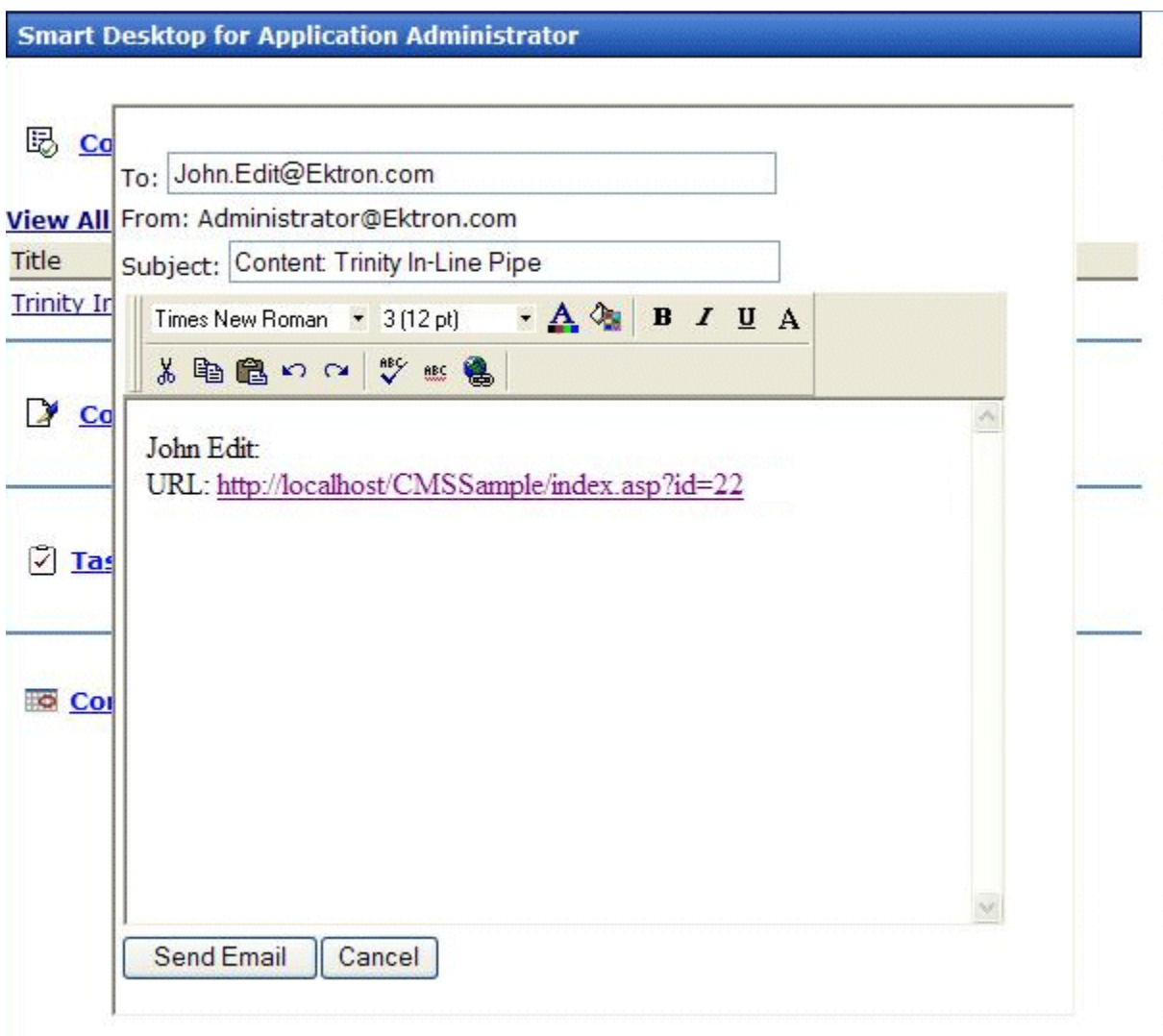
In addition to automatic email, **Ektron CMS400.NET** lets you send email instantly to a user or user group from many screens. Your ability to send instant mail is indicated by either

- a small mail icon next to a user or group name, as indicated in red below
- a small mail icon on the toolbar (see second image below)





When you click such a user/group name or email icon, the email screen appears, as shown below. Once you complete the screen and click **Send**, an email is sent to designated users.



Conditions for Instant eMail

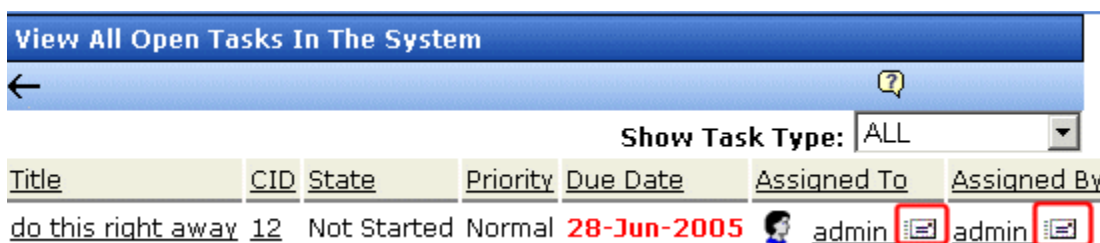
- The user who is using **Ektron CMS400.NET** must have a valid from email address set up in the user profile. If not, email icons do not appear in **Ektron CMS400.NET**.
- The email software must be configured for your server. See "[Configuring SMTP Server](#)" on page 624

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, an email icon appears (circled in the illustration below).




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	<p>User you selected to receive the email. If the user does not have valid email address, an error message appears. If you then insert a valid email address, the email is sent.</p> <p>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.</p>	<p>Yes.</p> <p>If desired, you can add recipients by typing them into this field.</p>

Field	Source of Default Information	Editable?
From	User who signed on to Ektron CMS400.NET .	No
Subject	<p>If the email message is linked to content, its title appears.</p> <p>The screen section below provides an example of content (Trinity In-Line Pipe) that is linked to a message.</p>	Yes

[View All Approvals](#)

Title	Request Type	Start Date	Submitted by
Trinity In-Line Pipe	Publish	[None Specified]	Edit, John 

Body of message	If the email message is linked to content, a link to the content appears.	Yes
-----------------	---	-----

Active Directory Feature

The Active Directory feature allows you to retrieve user and user group information from the Microsoft Windows Active Directory (AD) into Ektron CMS400.NET. As a result, you can administer user information from one place only, and users need to remember only one password/username combination to sign on to the network and Ektron CMS400.NET.

The Active Directory feature has two implementation modes, described in the following table. Choose the mode that best meets your needs.

Mode	Information Shared between AD and CMS	How to Implement	For more information, see
user authentication only	<ul style="list-style-type: none"> • user logon name • domain • password 	On the Active Directory Setup screen, check Enable Active Directory authentication .	"User Authentication Only Mode" on page 673
active directory integration	<ul style="list-style-type: none"> • user logon name • domain • password • user's first and last name • email address • user groups • user's group memberships 	<p>On the Active Directory Setup screen, check Enable Active Directory authentication and Enable Active Directory integration.</p> <p>You may also want to check Enable automatic addition of user from AD and Enable automatic addition of user to groups.</p>	"Active Directory Integration" on page 632

WARNING!

To successfully operate Ektron CMS400.NET with Active Directory, the anonymous access user must be running as a domain user account. It cannot be run under a local user account. That domain account can be permission-limited if security is a concern. If anonymous access user is not running as a domain user account, you receive an Automation Error when viewing the Active Directory

Setup page.

After Active Directory is installed correctly, you can view the AD Setup page and click edit, but when you try to save the settings, you receive a User Properties Verification error. At that point, you must either set up IIS to run as a domain user or the user properties are invalid. The domain user must have query permission into Active Directory so he can retrieve that information.

After you change the user account under which IIS is running, run Net Stop IISAdmin and Net Start W3SVC from the DOS prompt before trying to save the settings again.

WARNING!

Ektron strongly recommends configuring a secure socket layer (SSL), especially if you are using Active Directory Integration. SSL encrypts passwords that are otherwise sent as clear text to the Ektron CMS400.NET server. See SSL Support in the **Ektron CMS400.NET** Setup Manual for more information.

Active Directory Integration

This chapter covers the following topics:

- "How Information is Transferred from AD to Ektron CMS400.NET" on page 632
- "Which Information is Transferred from AD to Ektron CMS400.NET" on page 633
- "Logging into a System that Uses AD Integration" on page 634
- "Single Sign On" on page 634
- "Associating User Information in AD with Ektron CMS400.NET" on page 643
- "User Groups" on page 647
- "The Screens of the Active Directory Feature" on page 653
- "Setup Guidelines" on page 668
- "Disabling AD Integration" on page 670

How Information is Transferred from AD to Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD – it only reads from it. This results in the following changes to how user information is handled within Ektron CMS400.NET.

- Once you enable AD integration, all changes to user and user group information must be made in the AD -- the Ektron CMS400.NET Edit User and User Group screens change to primarily view screens.
- When adding a new user or user group to Ektron CMS400.NET, you can only select users and groups in the AD. If the user or user group does not exist in the AD, create them there first, and then import the user or group into Ektron CMS400.NET.

Which Information is Transferred from AD to Ektron CMS400.NET

Ektron CMS400.NET accesses the following AD user information.

- Authentication (password, user logon name, and domain) for signing in to Ektron CMS400.NET.

The password is not stored in Ektron CMS400.NET – the application only refers to the password during sign in.

- User information, listed in the following table

Field in AD	AD attribute	Corresponding field in Ektron CMS400.NET
User logon name (pre-Windows 2000)	sAMAccountName	Domain and Username <u>Note: Users can share a name in different domains. For example, juser/planets.com and juser/saturn.com. Otherwise, user names must be unique.</u>
Last Name	sn	Lastname
First Name	givenName	Firstname
Email	mail	email Address

- user group information, listed in the following table.

Field in AD	AD attribute	Corresponding field in Ektron CMS400.NET
Group Name (pre-Windows 2000)	cn	Domain and User group name <u>Note: User groups can share a name in different domains. For example, editors/planets.com and editors/saturn.com. Otherwise, user group names must be unique.</u>

The following diagram illustrates the components of the Active Directory feature.

A key component of this feature is keeping information in the AD consistent with Ektron CMS400.NET. The next sections explain

- ["Logging into a System that Uses AD Integration" on page 634](#)
- ["Associating User Information in AD with Ektron CMS400.NET" on page 643](#)
- ["User Groups" on page 647](#)
- ["The Screens of the Active Directory Feature" on page 653](#)

Logging into a System that Uses AD Integration

Because usernames and passwords are stored in the AD by domain, the AD sign on procedure requires you to select a domain name. So, if AD integration is enabled, the sign on screen includes a pull-down list that the user clicks to select a domain.



NOTE [Your organization determines AD domain names.](#)

For more information about logging in, see ["Logging Into an Ektron CMS400.NET Web Site" on page 6.](#)

Single Sign On

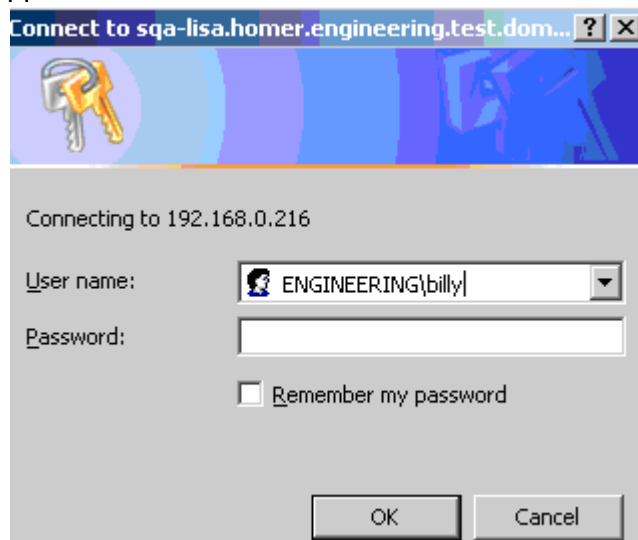
You can implement a Single Sign On feature that lets a user bypass the Login screen. The feature retrieves the user's Windows login information from the server to authenticate access to **Ektron CMS400.NET**.

How Single Sign on Works

The feature uses a variable called `User.Identity.Name`. This holds the user's account/domain in Active Directory, and has the format `[domain]\[username]`. For example, `EKTRON1\skearney`. This variable is set when the user authenticates against the Windows server.

The user logs in to **Ektron CMS400.NET** by going to the site and clicking the login server control. If the variable is passed and Active Directory is enabled, the server control opens the `autologin.aspx` page. Next, the opening window refreshes just like a normal login, except the user is not prompted to enter a username, password, and domain.

However, if the user's computer is not on a domain, not on the same domain as **Ektron CMS400.NET**, or does not include the **Ektron CMS400.NET** server as a trusted site, the following login screen appears.



If Active Directory is not enabled, the normal `login.aspx` page appears.

Setting up Single Sign On

The Single Sign On login process uses two files: `autologin.aspx` (in the `workarea/SSO` directory) and `login.aspx` (in the `workarea` directory). Once set up, user authentication is enabled from any domain that this server can reach. For example, if **Ektron CMS400.NET** is located in a third level domain, users from third, second, and first level domains can authenticate.

Setting up Single Sign On involves these procedures.

- ["Modifying Web.config for Single Sign On" on page 636](#)
- ["Adjusting Security Settings for the Site Root Folder" on page 636](#)
- ["Adjusting Security Settings for `autologin.aspx`" on page 638](#)
- ["Adjusting Security Settings for `login.aspx`" on page 641](#)
- ["Adjusting the Login Server Control" on page 642](#)

After completing these procedures, you should enable Active Directory within CMS (if it isn't already enabled). See Also: ["Setup Guidelines" on page 668](#)

Ektron recommends turning on the auto add options (user and group).

Modifying Web.config for Single Sign On

1. Open the `web.config` file, located on your site's root folder.
2. Find the `ek_AUTH_protocol` element.
3. Change its value to **GC**. It should look like this:

```
<add key="ek_AUTH_Protocol" value="GC" />
```

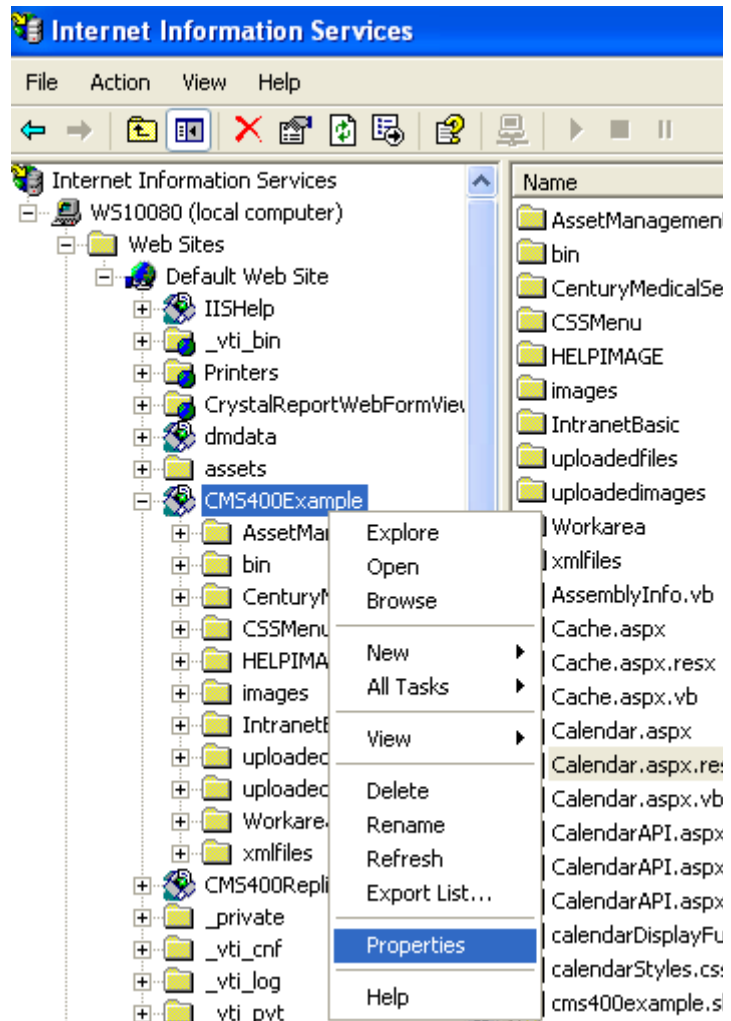
4. Find the `authentication` element.
5. Change the value of the `impersonate` attribute to **true**. It should look like this:

```
<authentication mode="Windows" />
```

```
<identity impersonate="true" userName="" password="" />
```

Adjusting Security Settings for the Site Root Folder

1. Go to **Windows Control Panel > Administrative Tools > Internet Information Services**.
2. Within IIS, go to **Web Sites > Default Web Site > CMS400 example**.
3. Right click the CMS400 example folder and select **Properties**.



4. Click the **File security** tab then the **Edit** button.

5. Uncheck everything except **Anonymous Access**. The **Account used for anonymous access** should specify a domain account, preferably the root of the Active Directory tree.

☒ Anonymous access

No user name/password required to access this resource.

Account used for anonymous access:

User name:

Password:

☒ Allow IIS to control password

Authenticated access

For the following authentication methods, user name and password are required when

- anonymous access is disabled, or
- access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers

☐ Basic authentication (password is sent in clear text)

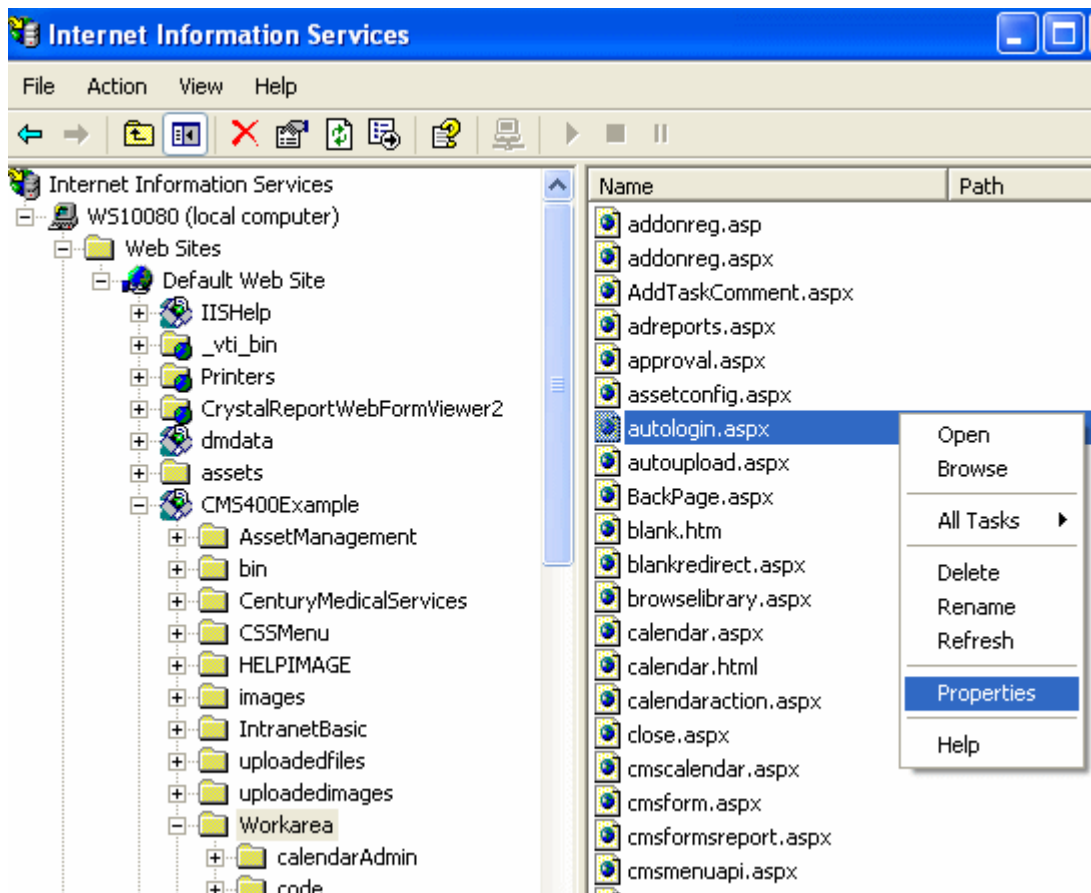
Default domain:

Realm:

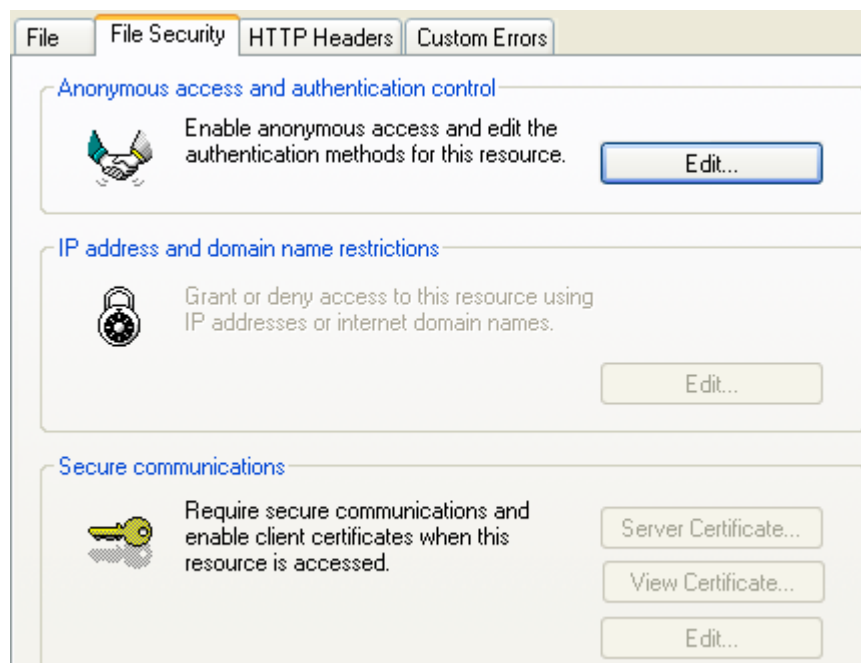
☐ Integrated Windows authentication

Adjusting Security Settings for autologin.aspx

1. Go to **Windows Control Panel > Administrative Tools > Internet Information Services**.
2. Within IIS, go to **Web Sites > Default Web Site > your Web site's root folder > Workarea > SSO > autologin.aspx**.
3. Right click autologin.aspx and select **Properties**.



4. Click the **File security** tab and the **Edit** button.



5. Under **Authenticated Access**, uncheck all except **Integrated Windows Authentication**.

The screenshot shows the 'Security' tab of the 'Internet Options' dialog box. Under the 'Anonymous access' section, the checkbox is unchecked. Below it, text states 'No user name/password required to access this resource.' and 'Account used for anonymous access:'. There are input fields for 'User name:' and 'Password:', with a 'Browse...' button next to the user name field. An unchecked checkbox 'Allow IIS to control password' is also present. The 'Authenticated access' section is expanded, showing text: 'For the following authentication methods, user name and password are required when' followed by a bulleted list: '- anonymous access is disabled, or' and '- access is restricted using NTFS access control lists'. Below this are two unchecked checkboxes: 'Digest authentication for Windows domain servers' and 'Basic authentication (password is sent in clear text)'. There are input fields for 'Default domain:' and 'Realm:', each with a 'Select...' button. The 'Realm' field contains the text 'intra.ektron.com'. At the bottom, the 'Integrated Windows authentication' checkbox is checked.

As a result, autologin.aspx will pass credentials from the logged-in user's desktop.

Adjusting Security Settings for login.aspx

1. Within **IIS > Web Sites > Default Web Site > your web site root > Workarea**, right click login.aspx and select **Properties**.
2. Click the **File security** tab then the **Edit** button.
3. Uncheck everything except **Anonymous Access**. The **Account used for anonymous access** should specify a domain account, preferably the root of the Active Directory tree.

☒ **Anonymous access**
 No user name/password required to access this resource.
 Account used for anonymous access:
 User name:
 Password:
☒ Allow IIS to control password

Authenticated access
 For the following authentication methods, user name and password are required when
 - anonymous access is disabled, or
 - access is restricted using NTFS access control lists

☐ Digest authentication for Windows domain servers
☐ Basic authentication (password is sent in clear text)

Default domain:
 Realm:
☐ Integrated Windows authentication

Adjusting the Login Server Control

4. In Visual Studio.NET, open the Login server control and set the AutoLogin property to **True**. (Server Controls are explained in the **Ektron CMS400.NET Developer's Manual**.)

Properties

Login1 Ektron.Cms.Controls.Login1

(DataBindings)	
(ID)	Login1
AccessKey	
Authenticated	False
AutoLogin	True
BackColor	True
BorderColor	False
BorderStyle	None
BorderWidth	

Associating User Information in AD with Ektron CMS400.NET


A key component of the Active Directory Integration feature is to maintain consistent information between the AD and Ektron CMS400.NET systems. This section explains how user information is transmitted between AD and Ektron CMS400.NET when integration is first enabled and on an ongoing basis.

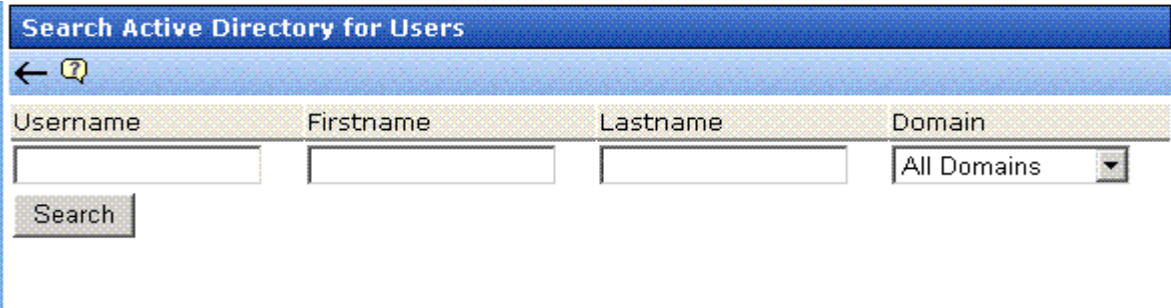
This section covers the following topics.


- ["Adding User Information from AD to Ektron CMS400.NET" on page 643](#)
- ["When Integration is First Enabled" on page 644](#)
- ["After Integration is Enabled" on page 645](#)
- ["Editing User Information in Ektron CMS400.NET" on page 646](#)
- ["Deleting Users" on page 646](#)
- ["Replacing a User" on page 646](#)

Adding User Information from AD to Ektron CMS400.NET


Before using the AD integration feature, you should add all AD users that you will use in your Web site into Ektron CMS400.NET. To copy an AD user into Ektron CMS400.NET, follow these steps.

1. From the left side of the Workarea, click **Users**.
2. Click the Add Users button ().
3. The Search Active Directory for Users screen appears.



Username	Firstname	Lastname	Domain
<input type="text"/>	<input type="text"/>	<input type="text"/>	All Domains 

4. From the **Domain** pull-down list, select the domain from which you want to add a user.

5. Enter as much information as you know into the other fields.
6. Click the **Search** button.
A new screen displays all users that satisfy the search criteria you entered.
7. Click the check box under the **Add** column to add users to Ektron CMS400.NET.
8. Click the Save button () to add AD users to Ektron CMS400.NET.
The View Users in Group Everyone screen appears, displaying the new user and the other Ektron CMS400.NET users.

When Integration is First Enabled

Ektron CMS400.NET Database Already Implemented

If **Enable automatic addition of user from AD** is checked on the Active Directory Setup screen, user information is copied from the AD to Ektron CMS400.NET when that user logs in or when the user is added to Ektron CMS400.NET.

See Also: ["The Active Directory Setup Screen" on page 653](#)

The first time the user information is copied, the AD information overwrites all Ektron CMS400.NET information. To learn how information is updated from then on, see ["After Integration is Enabled" on page 645](#).

If two or more AD users have the same Ektron CMS400.NET user logon name but different domains (for example, JDoe in Eng.Acme.com and JDoe in Mkt.Acme.com) and that username (JDoe) also exists in Ektron CMS400.NET, the Active Directory Setup and Active Directory Status screens highlight this discrepancy using the following message:

CMS users need to be associated with Active Directory users.

Click the message to proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen and associate an AD user with the Ektron CMS400.NET user.

See Also: ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 659](#)

Ektron CMS400.NET is Being Installed, so No User Database Exists

Go to the Search Active Directory for Users Screen and select AD users that will use Ektron CMS400.NET. When you add a user, the user information is copied from the AD to Ektron CMS400.NET.


See Also: ["The Search Active Directory for Users Screen" on page 665](#)

NOTE

You can only select AD users that do not already exist in Ektron CMS400.NET. Also, the Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for users within that domain.

After Integration is Enabled

User information is copied from the AD to Ektron CMS400.NET whenever either of these events occurs:

- the user logs in.
- someone clicks the Refresh button () on the user's View User Information screen.

See Also: ["The View User Information Screen" on page 663](#)

If a user's last name, first name, email field, or group membership changed in the AD, those changes are copied to Ektron CMS400.NET. However, if a user's *logon name* changed in the AD, that change is not copied to Ektron CMS400.NET because Ektron CMS400.NET uses that field to identify the user. Instead, that discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen, where you can update the AD user who is associated with the Ektron CMS400.NET user.

See Also: ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 659](#)

Editing User Information in Ektron CMS400.NET

Because **Ektron CMS400.NET** does not write to the AD, you can only change the **User Language** and **Disable email Notifications** fields within the Ektron CMS400.NET Edit User screen. You must edit all other user fields from the AD.

Deleting Users

If a user is deleted in AD, Ektron CMS400.NET does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

The user remains in Ektron CMS400.NET, and the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should delete the user from Ektron CMS400.NET using the Delete User function.

See Also: ["Deleting a User" on page 118](#)



NOTE

If you mistakenly delete all users with administrative privileges, you can still sign in using the builtin user's username and password. For more information, see ["BuiltIn User" on page 30](#).

Replacing a User

If you associate the wrong AD user with a Ektron CMS400.NET user, you can replace the user. If you do so, all Ektron CMS400.NET privileges and workflow responsibilities assigned to the old user are transferred to the new one.

Follow these steps to associate a Ektron CMS400.NET user with a new AD user.

1. From the left side of the Workarea, click **Users**.
2. Click the user that you want to replace.
3. Click the Associate CMS User with Different AD User button ().
4. Select a user to replace the user you selected in Step 2.
5. Click the Save button () to finalize the change.

When you complete this procedure, the first user is deleted from Ektron CMS400.NET.

User Groups

This section explains how a user's group membership is copied from the AD to the Ektron CMS400.NET system when integration is first enabled, and then on an ongoing basis. Once assigned to a group, the user automatically receives all Ektron CMS400.NET privileges and workflow responsibilities associated with it.

NOTE


The Active Directory has two kinds of user groups: security and distribution. Ektron CMS400.NET does not distinguish between them – as long as a user is a member of either kind of group, group information is imported to Ektron CMS400.NET.

This section explains the following topics.

- "Copying User Groups from AD to Ektron CMS400.NET" on page 647
- "Associating a User's AD Group Information with Ektron CMS400.NET" on page 648
- "Mapping the Administrator Group" on page 649
- "User Belongs to AD Group that Does Not Exist in Ektron CMS400.NET" on page 651
- "User Belongs to Ektron CMS400.NET Group that Does Not Exist in AD" on page 651
- "Removing Users from a Group" on page 651
- "Adding User Groups" on page 652
- "Adding a User to a Group" on page 652
- "Replacing a User Group" on page 652
- "Deleting a User Group" on page 652

Copying User Groups from AD to Ektron CMS400.NET


Before using the AD integration feature, you should copy all AD groups that you will use in your Web site into Ektron CMS400.NET. To copy an AD group into Ektron CMS400.NET, follow these steps.

1. From the left side of the Workarea, click the **User Groups** folder.
2. Click the Add Groups button ().

The Search Active Directory for Groups screen appears.

3. From the **Domain** pull-down list, select the domain from which you want to add a user group.

NOTE The Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for groups within that domain.

4. Enter as much information as you know into the Active Directory Group field.
5. Click the **Search** button.
6. A new screen displays all groups that satisfy the search criteria.
7. Click the check box under the **Add** column to add users to Ektron CMS400.NET.
8. Click the Save button ().

Associating a User's AD Group Information with Ektron CMS400.NET

When Integration is First Enabled

Ektron CMS400.NET User Database Already Exists

If **Auto Add User To Group** is checked (on the Active Directory Setup screen), a user's group membership is first copied from the AD to Ektron CMS400.NET or when a user logs in or is added. At this time, any AD group memberships overwrite Ektron CMS400.NET group memberships *except* the Everyone group, to which all users belong.

NOTE The Everyone group, unlike other Ektron CMS400.NET groups, is not associated with an AD group. It is an all-encompassing group with no special permissions.

If a user belongs to an AD user group that does not exist in Ektron CMS400.NET, nothing happens because the feature assumes that all AD groups are not meaningful in Ektron CMS400.NET.

If a user belongs to an Ektron CMS400.NET user group that does not exist in AD, the discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. From these screens, you can copy the AD group information into Ektron CMS400.NET.

See Also: ["Associating User Group Membership with Active Directory User Group Membership" on page 661](#) and ["Associating Groups with Active Directory Groups" on page 662](#)


To learn how membership is updated from then on, see ["After Integration is Enabled" on page 649](#).

Ektron CMS400.NET is Being Installed, so No User Groups Exist

Follow the procedure described in ["Copying User Groups from AD to Ektron CMS400.NET" on page 647](#) to copy AD user groups to Ektron CMS400.NET. As users in those groups are added to Ektron CMS400.NET, their group membership is copied from AD to Ektron CMS400.NET.

After Integration is Enabled

A user's group membership is updated in Ektron CMS400.NET when all of the following are true:

- The **Enable automatic addition of user to groups** field is checked on the Active Directory Setup screen
- A user is added to Ektron CMS400.NET or his group membership changes in the Active Directory
- The user logs in or someone clicks on the Refresh button () on the user's View User Information screen

Mapping the Administrator Group

On the Ektron CMS400.NET Active Directory Setup screen, you can identify an AD user group that maps to the Ektron CMS400.NET Administrator group.

Active Directory Setup

Active Directory Authentication is Enabled and Requires More Configuration.

Active Directory Installed:**Active Directory Authentication:**

Enabled

Active Directory Integration:

Enabled

Auto Add User:

Enabled

Auto Add User To Group:

Enabled

User Property Association**CMS Property Active Directory Property****EmailAddr1** mail**FirstName** givenName**LastName** sn**CMS Administrator Group Association****AD Group Name @ AD Domain**

Administrators @ planets.com

Domain

All Domains

Administrators have access to all functions documented in this documentation. (Unlike other Ektron CMS400.NET user groups, whose names are copied from the AD, the Administrator and Everyone group names cannot be changed.)

For example, if the AD has a user group named CMSAdmin whose members should have the privileges of Ektron CMS400.NET administrators, assign that group to Administrators on the Active

Directory Setup screen. If such a group does not exist in AD yet, you should create it and then assign it on the Active Directory Setup screen.

Note that only one AD group can be mapped to the Ektron CMS400.NET Administrator group -- you cannot have an AD administrator group within each AD domain.

See Also: ["The Active Directory Setup Screen" on page 653](#)

User Belongs to AD Group that Does Not Exist in Ektron CMS400.NET

If user is assigned to an AD user group that does not exist in Ektron CMS400.NET, nothing happens. The AD integration feature assumes that an Ektron CMS400.NET administrator only maintains user groups that are meaningful to Ektron CMS400.NET, and not all AD groups may be meaningful to Ektron CMS400.NET.

NOTE	<hr/> <p>If a user belongs to a user group that is given Membership permissions, but also to a group that has CMS permissions, the user will only receive Membership permissions if logged into Ektron CMS400.NET.</p> <hr/>
-------------	--

User Belongs to Ektron CMS400.NET Group that Does Not Exist in AD

If a user was a member of a user group in Ektron CMS400.NET before integration was enabled, but does not belong to that group in the AD, this discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

If the user should belong to the AD group, add the group membership within the AD. Then, refresh the user on these screens to copy AD group information into Ektron CMS400.NET.

See Also: ["Associating Groups with Active Directory Groups" on page 662](#)

Removing Users from a Group

If you delete a user from an AD group, the user is automatically removed from the associated Ektron CMS400.NET group the next time the user's information is updated (as explained in ["After Integration is Enabled" on page 645](#)).

Adding User Groups



Once AD integration is enabled, you can only add new user groups in the AD. In Ektron CMS400.NET, use the Search Active Directory for Groups screen to copy an AD user group to Ektron CMS400.NET. You can only add groups that do not already exist in Ektron CMS400.NET. This procedure is described in "[Copying User Groups from AD to Ektron CMS400.NET](#)" on page 647.

Adding a User to a Group

You cannot add a user to a user group within Ektron CMS400.NET -- you must do so in the Active Directory.

Replacing a User Group

If you realize that you have associated the wrong AD user group with an Ektron CMS400.NET user group, you can replace the user group. Follow these steps to do so.

1. From the left side of the Workarea, click **User Groups**.
2. Click the user group that you want to replace.
3. Click the Associate Ektron CMS400.NET Group with Different AD Group button (.
4. Select a group to replace the group you selected in Step 2.
5. Click the Save button () to finalize the change.

Deleting a User Group

Deleting a User Group in AD

If you delete a user group in AD and users are assigned to the group within Ektron CMS400.NET, the group is not automatically deleted in Ektron CMS400.NET. However, any Ektron CMS400.NET users who were members of the group are no longer members the next time their Ektron CMS400.NET information is updated. The discrepancy is flagged on the Active Directory Setup and Active Directory Status screens.

Deleting a User Group in Ektron CMS400.NET

If you delete a user group in Ektron CMS400.NET and users are assigned to that group within AD, nothing happens. This is because the AD Integration Feature assumes that, in Ektron CMS400.NET, the administrator only sets up user groups that are meaningful to Ektron CMS400.NET, and some AD groups are not meaningful to Ektron CMS400.NET.

The Screens of the Active Directory Feature

The Active Directory feature uses the following screens:

- "The Active Directory Setup Screen" on page 653
- "The Active Directory Status Screen" on page 658
- "The View Users Screen" on page 663
- "The View User Groups Screen" on page 666

This section explains how to use each screen.

The Active Directory Setup Screen

The Active Directory Setup screen (illustrated below) lets you enable and disable the Active Directory feature, as well as determine other aspects of AD management, such as whether users and groups are automatically updated. To access the screen, click **Configuration > Active Directory > Setup** from the left panel of the Workarea.

Active Directory Setup

Active Directory Authentication is Enabled and Requires More Configuration.

Active Directory Installed:**Active Directory/LDAP Authentication:**

Enabled

Active Directory Integration:

Enabled

Auto Add User:

Enabled

Auto Add User To Group:

Enabled

User Property Association**CMS Property Active Directory Property**

EmailAddr1 mail

FirstName givenName

LastName sn

CMS Administrator Group Association**AD Group Name @ AD Domain**

Administrators @ planets.com

Domain

All Domains

The following table describes the fields on the screen.

See Also: ["Messages Near the Top of the Active Directory Setup Screen" on page 657](#)

Field	Description	For more information, see
Active Directory Installed		
Disable Active Directory and LDAP Authentication	Disables the use of Active Directory and LDAP Authentication.	"Disabling AD Integration" on page 670
Enable LDAP Authentication	If enabled, you need to fill out the following five fields. These fields are explained in the LDAP Authentication chapter.	"Enabling LDAP" on page 681
LDAP Server	This field is explained in the LDAP Authentication chapter.	"Enabling LDAP" on page 681
Port	This field is explained in the LDAP Authentication chapter.	"Enabling LDAP" on page 681
Organization	This field is explained in the LDAP Authentication chapter.	"Enabling LDAP" on page 681
Domain	This field is explained in the LDAP Authentication chapter.	"Enabling LDAP" on page 681
Organizational Unit	This field is explained in the LDAP Authentication chapter.	"Enabling LDAP" on page 681
Active Directory Authentication	If enabled, user authentication is functional, and you can enable the following three fields.	"User Authentication Only Mode" on page 673 For information on LDAP, see "LDAP Authentication" on page 679
Active Directory Integration	If enabled, the Active Directory feature is functional. <u>Can only be enabled if Active Directory Authentication is enabled.</u>	"Active Directory Integration" on page 632

Field	Description	For more information, see
Auto Add User	If enabled, user information is copied from the AD to Ektron CMS400.NET when that user logs in or when the user is added to Ektron CMS400.NET. <u>Can only be enabled if Active Directory Integration is enabled.</u>	"Associating User Information in AD with Ektron CMS400.NET" on page 643
Auto Add User To Group	If enabled, a user's group membership is first copied from the AD when a user logs in or is added. <u>Can only be enabled if Active Directory Integration is enabled.</u>	"User Groups" on page 647
User Property Mapping		
FirstName	Enter the Active Directory Property that maps to the user's first name in Ektron CMS400.NET. By default, this is set to <code>givenName</code> , but you can change it to any AD property.	MSDN Library (http://msdn.microsoft.com/library/default.asp) > Active Directory, ADSI and Directory Services > Directory Services > Active Directory > Active Directory Reference > Active Directory User Interface Mappings.
LastName	Enter the Active Directory Property that maps to the user's last name in Ektron CMS400.NET. By default, this is set to <code>sn</code> , but you can change it to any AD property.	same reference as FirstName (above)
EmailAddr1	Enter the Active Directory Property that maps to the user's last name in Ektron CMS400.NET. By default, this is set to <code>mail</code> , but you can change it to any AD property.	same reference as FirstName (above)
Ektron CMS400.NET Administrator Group Mapping		
AD Group Name @ AD Domain	Enter the Active Directory user group and domain name that maps to the hard coded Ektron CMS400.NET administrator group. If you do not have an AD user group that includes all Ektron CMS400.NET administrators, you should create one and enter its name and domain here.	"Mapping the Administrator Group" on page 649

Field	Description	For more information, see
Domain	<p>If you want to restrict the search of new users and groups to one AD domain, select that domain.</p> <p>If you do, the Search Active Directory for Users and Search Active Directory for Groups screens let you search in the selected domain only.</p> <p>Also, if any Ektron CMS400.NET user or group names include a domain (for example, admin@saturn.planets.com) that is excluded by your selection, those users/groups are flagged on the Active Directory Setup and Active Directory Status screens because the names now include an invalid domain.</p>	

Messages Near the Top of the Active Directory Setup Screen

Active Directory Setup



Active Directory Authentication is Enabled and Requires More Configuration.

Active Directory Installed:

Active Directory Authentication:

Enabled

Active Directory Integration:

Enabled

Auto Add User:

Message	Explanation
Active Directory Authentication is Enabled and Requires More Configuration.	Some Ektron CMS400.NET users are not associated with AD users. Also, if you are using full active directory integration mode, user groups and/or user group relationships may not be associated.

Message	Explanation
Active Directory Authentication is disabled, but needs further configuration	<p>Some Ektron CMS400.NET users and/or groups are no longer unique. This happens because, in the AD, users and groups can share a logon name as long as their domains are different.</p> <p>But, when AD authentication is disabled, two Ektron CMS400.NET users or groups can no longer share a name -- each name must be unique.</p>

If you see either message, click it. You proceed to the Active Directory Status screen, which helps you resolve the discrepancies.

See Also: ["The Active Directory Status Screen" on page 658](#)

The Active Directory Status Screen

Use the Active Directory Status screen to resolve the following discrepancies between Ektron CMS400.NET and AD.

- an Ektron CMS400.NET user needs to be associated with an AD user
- an Ektron CMS400.NET user group needs to be associated with an AD user group
- an Ektron CMS400.NET user's group membership need to be associated with the same AD user's group membership

To access the screen, click **Configuration > Active Directory > Status** from the left panel of the Workarea.

Active Directory Status



Active Directory is Enabled and Requires More Configuration:

[CMS users need to be associated with Active Directory users.](#)

[CMS groups need to be associated with Active Directory groups.](#)

[CMS relationships need to be associated with Active Directory relationships.](#)

There are several reasons why such discrepancies may occur. To learn more about why

- an Ektron CMS400.NET user is not associated with an AD user, read "[Associating User Information in AD with Ektron CMS400.NET](#)" on page 643.
- an Ektron CMS400.NET user's group membership is not associated with the user's AD group membership, read "[Associating a User's AD Group Information with Ektron CMS400.NET](#)" on page 648
- an Ektron CMS400.NET group is not associated with an AD group, read "[User Groups](#)" on page 647




If you click any link on the Active Directory Status screen, a new screen appears that allows you to resolve the discrepancy. For information on how to use these screens, see the following topics.

- "[Associating Ektron CMS400.NET Users with Active Directory Users](#)" on page 659
- "[Associating User Group Membership with Active Directory User Group Membership](#)" on page 661
- "[Associating Groups with Active Directory Groups](#)" on page 662






Associating Ektron CMS400.NET Users with Active Directory Users

If you click **CMS users need to be associated with Active Directory users** on the Active Directory Status screen, the Associate Ektron CMS400.NET Users with Active Directory Users screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET users with AD users.

Associate CMS Users with Active Directory Users






5 users are displayed at a time [Show All](#)


CMS Username	AD Username	@	AD Domain	Search	Delete
 EkExplorerUser	<input type="text"/>	@	<input type="text"/>	Search	<input type="checkbox"/>
 jedit	<input type="text"/>	@	<input type="text"/>	Search	<input type="checkbox"/>
 jmember	<input type="text"/>	@	<input type="text"/>	Search	<input type="checkbox"/>
 jsmith	<input type="text"/>	@	<input type="text"/>	Search	<input type="checkbox"/>
 tbrown	<input type="text"/>	@	<input type="text"/>	Search	<input type="checkbox"/>

If a user with the same username exists in the AD, that name and domain appear by default in the **AD Username** and **AD Domain** fields. If the user exists in the more than one AD domain (as illustrated in the first example above), select a domain from the pull-down list.

If there is no default and you know the AD user name to associate with an Ektron CMS400.NET user, enter that in the **AD Username** and **AD Domain** fields. If you do not know the AD username, click **Search** to find the user in the AD.

If you decide to change the username in AD to match the Ektron CMS400.NET username, make the change in the AD. Then, click the Refresh button () to update Ektron CMS400.NET and resolve the discrepancy.

Finally, if this user should not exist in the Ektron CMS400.NET database, click the box under the **Delete** column to delete the user from Ektron CMS400.NET.

After you make all necessary changes, click the Save button () to save them.

Associating User Group Membership with Active Directory User Group Membership



If you click **CMS relationships need to be associated with Active Directory relationships** on the Active Directory Status screen, the Associate Ektron CMS400.NET Relationships with Active Directory Relationships screen appears (illustrated below). Use this screen to coordinate Ektron CMS400.NET user group membership with AD user group membership.

The screen displays a user's group membership that exists in Ektron CMS400.NET, but does not exist in the AD.

Associate CMS Relationships with Active Directory Relationships		
  		
Username	User Group Name	Delete
Kristin@planets.com	editors	<input type="checkbox"/>

See Also: ["Associating a User's AD Group Information with Ektron CMS400.NET" on page 648](#)

After viewing the discrepancy on the screen, you have two choices:

- To associate the user with the same user group in the AD, go to the AD and assign the user to the group. Then, return to this screen and click the Refresh button () to update the user group information in Ektron CMS400.NET.
- To remove the user's group membership in Ektron CMS400.NET, check the box under the **Delete** column and click the Save button ()

Associating Groups with Active Directory Groups


If you click **CMS groups need to be associated with Active Directory groups** on the Active Directory Status screen, the Associate Ektron CMS400.NET User Groups with Active Directory Groups screen appears (illustrated below). Use this screen to associate Ektron CMS400.NET groups with AD groups.

Associate CMS Groups with Active Directory Groups				
CMS Group Name	AD Group Name	@	AD Domain	Search Delete
Editors	<input type="text" value="Editors"/>	@	<input type="text" value="planets.com"/>	Search <input type="checkbox"/>

If a group with the same groupname exists in the AD, that name appears by default in the **AD Group Name** field. If the group exists in the more than one domain within the AD, select a domain from the pull-down list.

If there is no default and you know the AD group name to associate with an Ektron CMS400.NET group, enter that in the **AD Group Name** and **AD Domain** fields. If you do not know the AD groupname, click **Search** to find the group in the AD.

Finally, if this group should not exist in the Ektron CMS400.NET database, click the box under the **Delete** column to delete the group from Ektron CMS400.NET.

After you make all necessary changes, click the Save button () to save them.

The View Users Screen






The View Users screen (illustrated below) lists all users in the Ektron CMS400.NET database. To access the screen, click **Users** from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.

View Users in Group "Everyone"			
 ←			
<u>Username</u>	<u>Lastname</u>	<u>Firstname</u>	<u>Language</u>
 admin@planets.com	admin	admin	App Default
 aoneil@saturn.planets.com	O'Neil	Ambrose	App Default
 bbolt@saturn.planets.com	Bolt II	Bob	App Default
 doneil@planets.com	Oneil	Daniel	App Default

The View Users screen also provides a toolbar button () that lets you add AD users to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Users Screen appears.

The View User Information Screen

View User Information "aoneil@saturn.planets.com"



Username:	aoneil
Domain	saturn.planets.com
First Name:	Ambrose
Last Name:	O'Neil
User Language:	App Default
E-Mail Address:	[None Specified]
E-Mail Notifications:	E-Mail Disabled

(Emails for this application are currently disabled)

This User currently belongs to these User Groups:

- Everyone






The View User Information Screen displays the user's

- username and domain
- first and last name
- language
- email address and whether the user receives email notifications
- user groups


If you are using *user authentication mode*, **username** and **domain** can only be edited in the AD. You can edit all other fields on this screen.

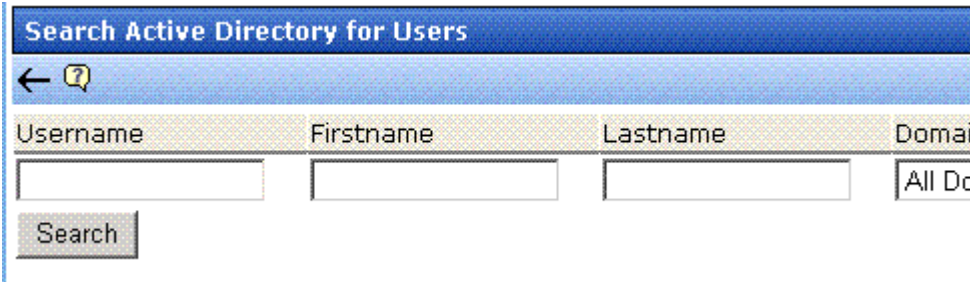
If you are using *full AD Integration mode*, you can only edit **language** and whether the user receives email notifications. You must edit the other fields in the AD.

The screen also displays the following buttons.

Button	Description
	Edit information on screen
	Delete user <i>See Also: "Deleting Users" on page 646</i>
	Retrieve latest information from AD into Ektron CMS400.NET <i>See Also: "After Integration is Enabled" on page 645</i> <u>Note: This toolbar button does not appear if you are using user authentication mode.</u>
	Replace user <i>See Also: "Replacing a User" on page 646</i>
	Return to previous screen

The Search Active Directory for Users Screen


Use this screen to add AD users to Ektron CMS400.NET. To access the screen, click **Users** from the left panel of the Workarea, then click the Add button ().



Enter as much search criteria as you know to reduce the number of users that the search yields. For example, if you know that the

user's last name is Jackson and the user is in the planets domain, enter those criteria and you will get many fewer hits.



When the Active Directory Users screen appears, click the box next to users that you want to create in Ektron CMS400.NET.

Then, click the Save button () to copy their information into Ektron CMS400.NET.


The View User Groups Screen

The View User Groups Screen displays all AD user groups that have been copied into Ektron CMS400.NET. (See ["Copying User Groups from AD to Ektron CMS400.NET" on page 647](#)).

To access the screen, click **User Groups** from the left panel of the Workarea.

View User Groups	
	
User Group Name	Number of Users
 Account Operators @ planets.com	0
 Account Operators @ saturn.planets.com	0
 Account Operators @ venus.planets.com	0
 Administrators @ planets.com	0
 Administrators @ saturn.planets.com	0
 Administrators @ venus.planets.com	0
 Backup Operators @ planets.com	0






To view more information for a group, click that group to move to the View Users in Group screen.

The View User Groups screen also provides a toolbar button () that lets you add AD groups to the Ektron CMS400.NET database. When you click it, the Search Active Directory for Groups screen appears.



View Users in Group Screen

The View Users in Group Screen displays, for each user in the group


- username and domain
- first and last name
- language

View Users in Group "CMSAdmin@planets.com"			
 			
Username	Lastname	Firstname	Language
 admin@planets.com	admin	admin	App Default
 aoneil@saturn.planets.com	O'Neil	Ambrose	App Default
 bbolt@planets.com	Bolt	Bob	App Default

The screen also displays the following buttons.

Button	Description
	Replace group <i>See Also:</i> "Replacing a User Group" on page 652
	Return to previous screen

The Search Active Directory for Groups Screen


Search Active Directory for Users		
 		
Username	Firstname	Lastname
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Search"/>		

Use this screen to add AD groups to Ektron CMS400.NET. Enter as much search criteria as you know to reduce the number of groups that the search yields.

NOTE

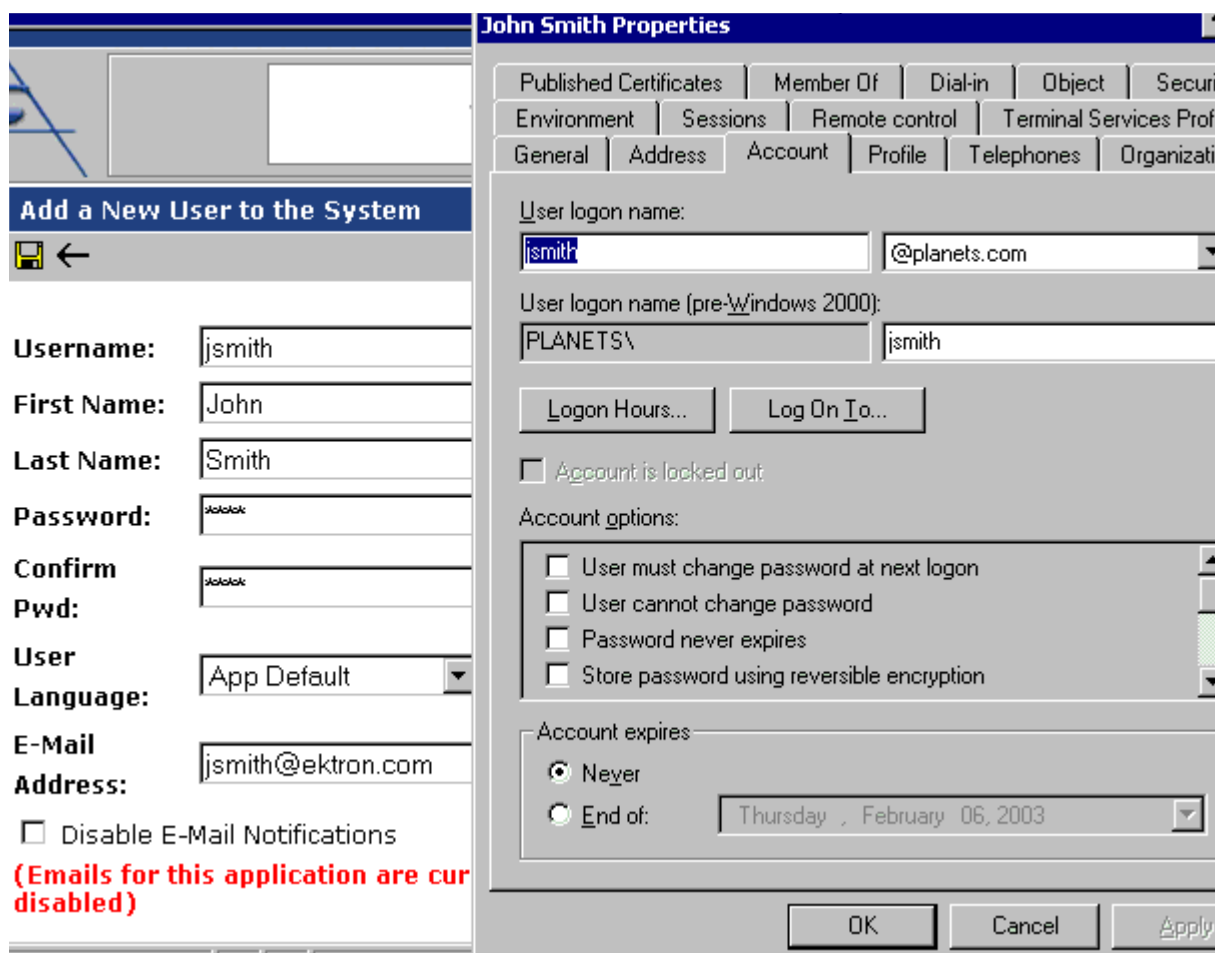
You can only select AD groups that do not already exist in Ektron CMS400.NET. Also, the Active Directory Setup screen can restrict AD integration to one domain. If it does, you can only search for groups within that domain.

For example, if you know that the group begins with S and is in the planets domain, enter those criteria and you will get many fewer hits.

After you click Search, a new screen appears listing all AD groups that satisfy the search criteria. Click the box next to groups that you want to create in Ektron CMS400.NET. Then, click the Save button () to copy their information.

Setup Guidelines

1. Make sure that the users and user groups in the Active Directory are defined correctly. Remember that, when you enable AD integration, first name, last name and email are copied from AD to Ektron CMS400.NET.
2. Determine which AD users and groups will be used in your Ektron CMS400.NET.
3. Try to match up names. For example, if a user in Ektron CMS400.NET has the username of jsmith, but that user in AD has a username of john.smith, rename the user in Ektron CMS400.NET or in Active Directory so they match. This can be done during the actual integration, but doing it beforehand simplifies the process later.



Add a New User to the System

Username: jsmith

First Name: John

Last Name: Smith

Password: *

Confirm Pwd: *

User Language: App Default

E-Mail Address: jsmith@ektron.com

☐ Disable E-Mail Notifications

(Emails for this application are currently disabled)

John Smith Properties

Published Certificates | Member Of | Dial-in | Object | Security

Environment | Sessions | Remote control | Terminal Services Profile

General | Address | Account | Profile | Telephones | Organization

User logon name: jsmith @planets.com

User logon name (pre-Windows 2000): PLANETS\jsmith

Logon Hours... Log On To...

☐ Account is locked out

Account options:

- ☐ User must change password at next logon
- ☐ User cannot change password
- ☐ Password never expires
- ☐ Store password using reversible encryption

Account expires:

- ☒ Never
- ☐ End of: Thursday, February 06, 2003

OK Cancel Apply

- Determine which users should be in which groups, and make sure those relationships exist in both Ektron CMS400.NET and AD.
- If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS400.NET to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)

6. Determine if you want users to automatically be added at log in or if you want to manually add them yourself. (You will use this when completing the **Enable automatic addition of user from AD** field of the Active Directory Setup Screen.)
7. Determine if you want user groups to be associated at log in or if you want to manually associate them. (You will use this when completing the **Enable automatic addition of user to groups** field of the Active Directory Setup Screen.)
8. Set the `impersonate` element's value to `true`. To do so, follow these steps.
 - Open the `web.config` file, located on your site's root folder.
 - Find the `authentication` element.
 - Change the value of the `impersonate` attribute to **true**. It should look like this:

```
<authentication mode="Windows" />
```

```
<identity impersonate="true" userName="" password="" />
```

Disabling AD Integration

If you decide to disable AD authentication or integration, edit the Active Directory Setup screen and uncheck the box next to **Enable Active Directory Authentication** or **Enable Active Directory Integration**.

See Also: ["The Active Directory Setup Screen" on page 653](#)

If you do this, and any users or groups share the same name within different domains, the following message appears on the screen.

Active Directory Authentication is disabled, but needs further configuration

For example, two users are named JJackson@saturn.com and JJackson@planets.com. When AD was enabled, the domain names made the two users unique. However, when you disable integration, the domain names are dropped, so the user names are now identical. You need to make the users unique.

If you click the message (above) on the Active Directory Setup screen, you move to the Active Directory Status screen. The following messages may appear.





Active Directory Authentication is disabled, but needs further configuration.

CMS users need to be made unique because they have the same usernames as other users.

CMS groups need to be made unique because they have the same names as other groups.

Click the message to proceed to the Make Ektron CMS400.NET Users Unique screen (illustrated below).



Make CMS Users Unique		
 		
Username	@ Domain	New Unique Username
bbolt	@ saturn.planets.com	bbolt_@_saturn.planets.com
bbolt	@ venus.planets.com	bbolt_@_venus.planets.com

This screen lists all users whose user names are not unique and suggests a new, unique Ektron CMS400.NET username. The new name consists of the user name, underscore, at sign (@), underscore, the domain name. So, for example, JJackson@saturn.com would appear as JJackson_@_saturn.com.

The same is true for user groups. For example, if you had two groups name Account Operators, one in the planets.com domain

and another in the saturn.planets.com domain, the Make Ektron CMS400.NET Groups Unique screen would look like this.

Make CMS Groups Unique

User Group Name	@ Domain	New Unique User Group Name
Account Operators	@ planets.com	Account Operators_@_planets.com
Account Operators	@ saturn.planets.com	Account Operators_@_saturn.planets.com

Ektron recommends that you accept the suggested new names.

Click the Save () button to do so.

One advantage of using the new name format is that, if you later decide to re-enable AD integration, the software can automatically associate the AD and Ektron CMS400.NET users or groups.

User Authentication Only Mode

How Information is Transferred from Active Directory to Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD – it only reads from it. This results in the following changes to how the username, domain, and password are handled within Ektron CMS400.NET.

- Changes to user logon name, domain and password must be made in the AD — you cannot update these fields in the Ektron CMS400.NET Edit User screens.
- When adding a new user to Ektron CMS400.NET, you can only select AD users. If the user does not exist in the AD, create the user there, and then import the user into Ektron CMS400.NET.

Which Information is Transferred from Active Directory to CMS400.NET

CMS refers to the following AD sign-in authentication information during sign-in: password, user logon name, and domain. Note that the password is not stored in CMS — CMS only refers to the password during sign-in.

Logging In

See ["Logging into a System that Uses AD Integration"](#) on page 634


Adding User Information from AD to Ektron CMS400.NET

See ["Adding User Information from AD to Ektron CMS400.NET"](#) on page 643

Changing the User Login Name in AD

If a user's *logon name* changes in the AD, it no longer matches the Ektron CMS400.NET logon name. This discrepancy is flagged on the Active Directory Setup and Active Directory Status screens. You should proceed to the Associate Ektron CMS400.NET Users to Active Directory Users screen, where you can update the user information.

Alternatively, you could

1. Go to the View User Information screen.
2. Select the user whose AD name changed.
3. Click the Associate the Ektron CMS400.NET user with
Different AD user toolbar button ().

4. Select the AD user and domain.

See Also: "[Associating Ektron CMS400.NET Users with Active Directory Users](#)" on page 659

Editing User Information in Ektron CMS400.NET

Ektron CMS400.NET does not write to the AD. This means that you can only change the **Username** and **Domain** fields from the AD.

You can change the **First Name**, **Last Name**, **email Address**, **User Language** and **Disable email Notifications** fields on the Ektron CMS400.NET Edit User screen.

Deleting Users

See "[Deleting Users](#)" on page 646

Replacing a User

See "[Replacing a User](#)" on page 646

IMPORTANT!

If you replace a user in user authentication-only mode, the user's first name, last name, and email address are not overwritten with information in the active directory.

User Groups

User authentication mode has no effect on user groups. To learn more about user groups, see ["Managing User Groups" on page 119](#).

The Screens of the Active Directory Feature in User Authentication Mode

Since the scope of user authentication mode is limited, only some fields on the AD screens are used. For example, on the Active Directory setup screen, the only relevant fields are authentication and domain.

See Also: ["The Active Directory Setup Screen" on page 653](#)

Also, on the Active Directory Status Screen, only one discrepancy message may appear:

CMS user needs to be associated with an AD user

See Also: ["Associating Ektron CMS400.NET Users with Active Directory Users" on page 659](#)

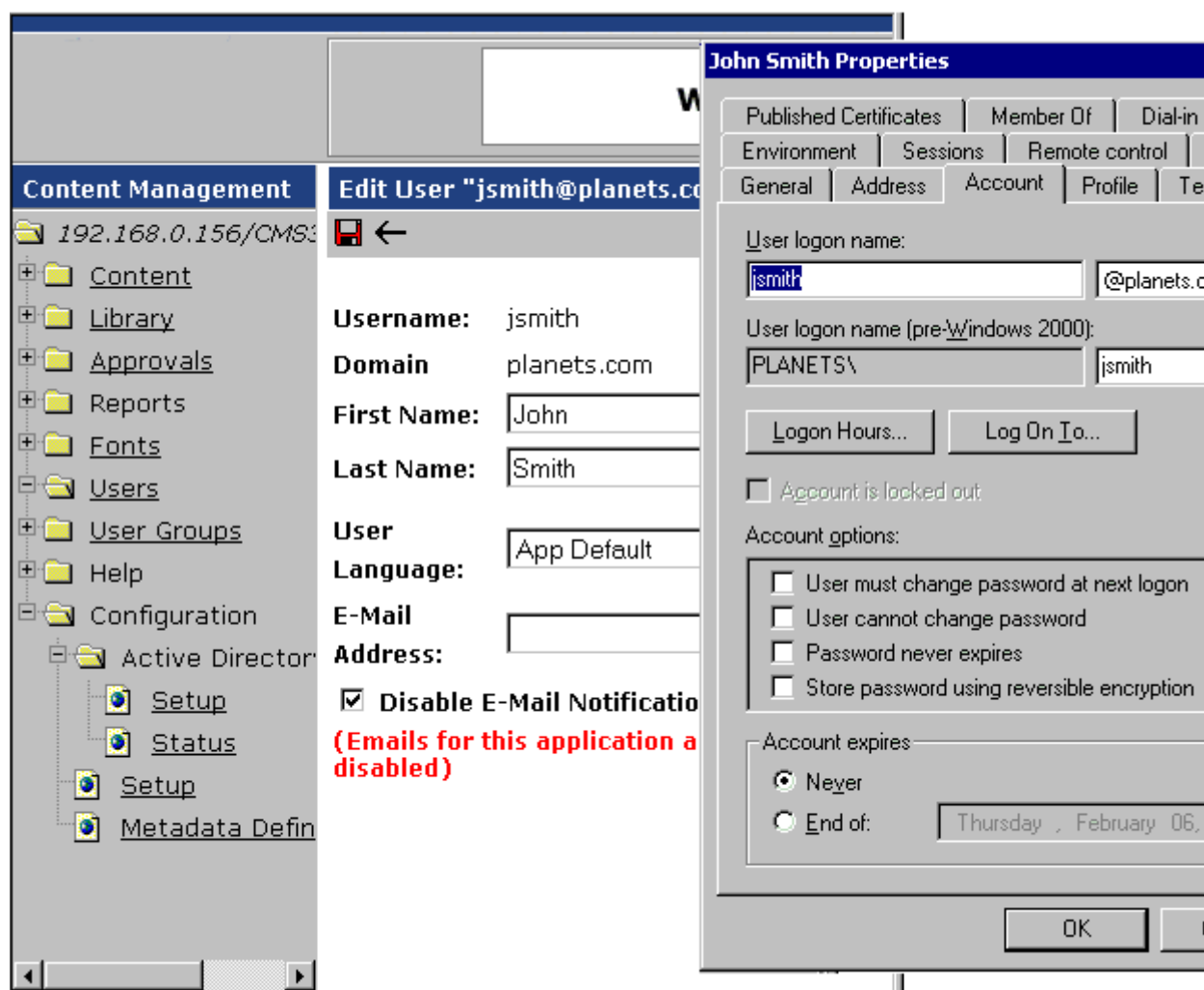
The View Users Screen works the same for both modes.

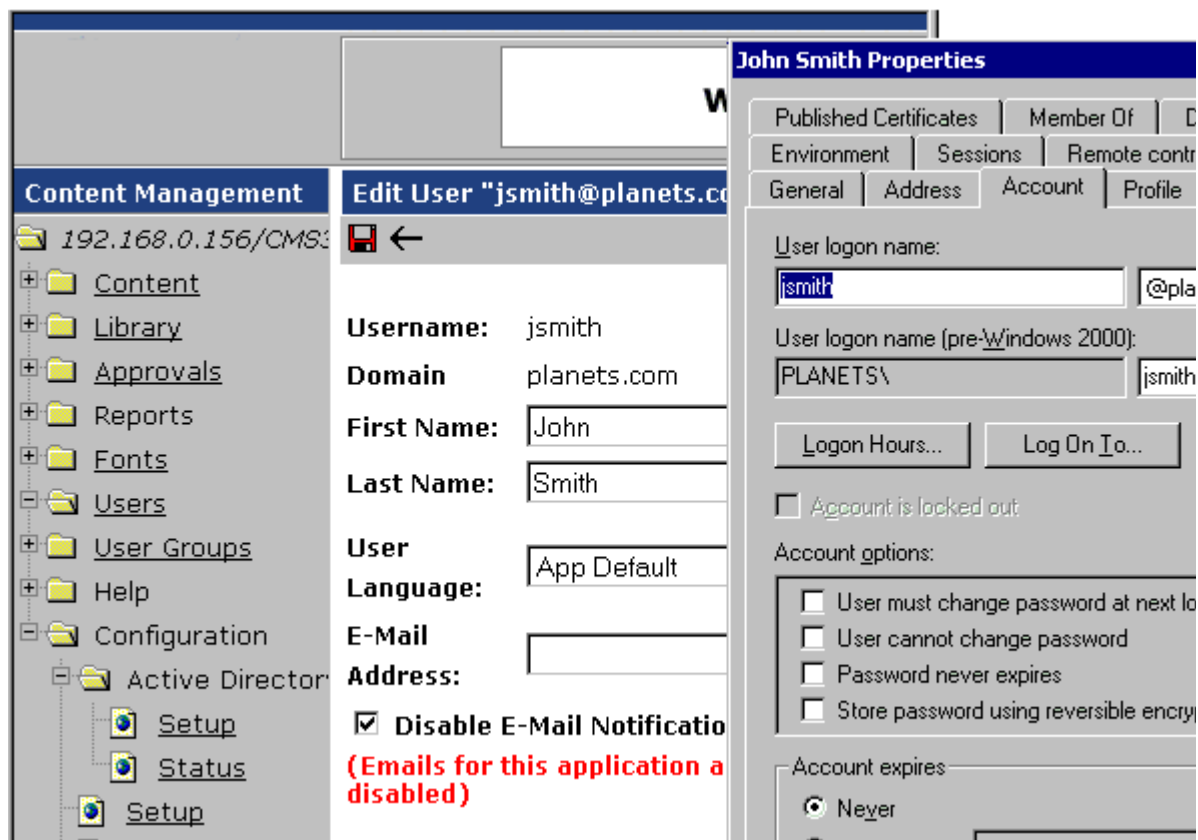
See Also: ["The View User Information Screen" on page 663](#)

Setup Guidelines

1. Make sure that each AD user to be used in Ektron CMS400.NET is defined correctly in the Active Directory. Remember that, when you enable AD integration, logon name and domain are copied from AD to Ektron CMS400.NET.

2. Try to match up names. For example, if an Ektron CMS400.NET user's username is jsmith, but that user's AD username is john.smith, rename the user in Ektron CMS400.NET or Active Directory so they match. While you can match user names when authentication is enabled, doing it beforehand simplifies the process.





3. If you have multiple domains in your Active Directory Forest, decide if you want Ektron CMS400.NET to reference all domains or if you want to choose a specific one. (You will use this when completing the **Domain** field of the Active Directory Setup Screen.)
4. Set the `impersonate` element's value to `true`. To do so, follow these steps.
 - Open the `web.config` file, located on your site's root folder.
 - Find the `authentication` element.
 - Change the value of the `impersonate` attribute to **true**. It should look like this:

```
<authentication mode="Windows" />
```

```
<identity impersonate="true" userName="" password=""/>
```

Disabling AD Authentication

See ["Disabling AD Integration" on page 670](#)

LDAP Authentication

LDAP is short for Lightweight Directory Access Protocol. It is a set of protocols, which enables corporate directory entries to be arranged in a hierarchical structure that reflects geographic and organizational boundaries.

The LDAP feature in Ektron CMS400.NET allows you to retrieve user Login information from an LDAP server into Ektron CMS400.NET. As a result, you can administer user information from one place only, and users need to remember only one password/username combination to sign on to the network and Ektron CMS400.NET.

The hierarchical structure of LDAP authentication can look a few different ways. For example, if you had the following LDAP structure, the domain would typically span multiple countries.

CN=David Wells, OU=Pitchers, O=Red Sox, C=US,
DN=Baseball.com

By changing the order of C and DN, the hierarchy then states that the domain Baseball.com is located in the US.

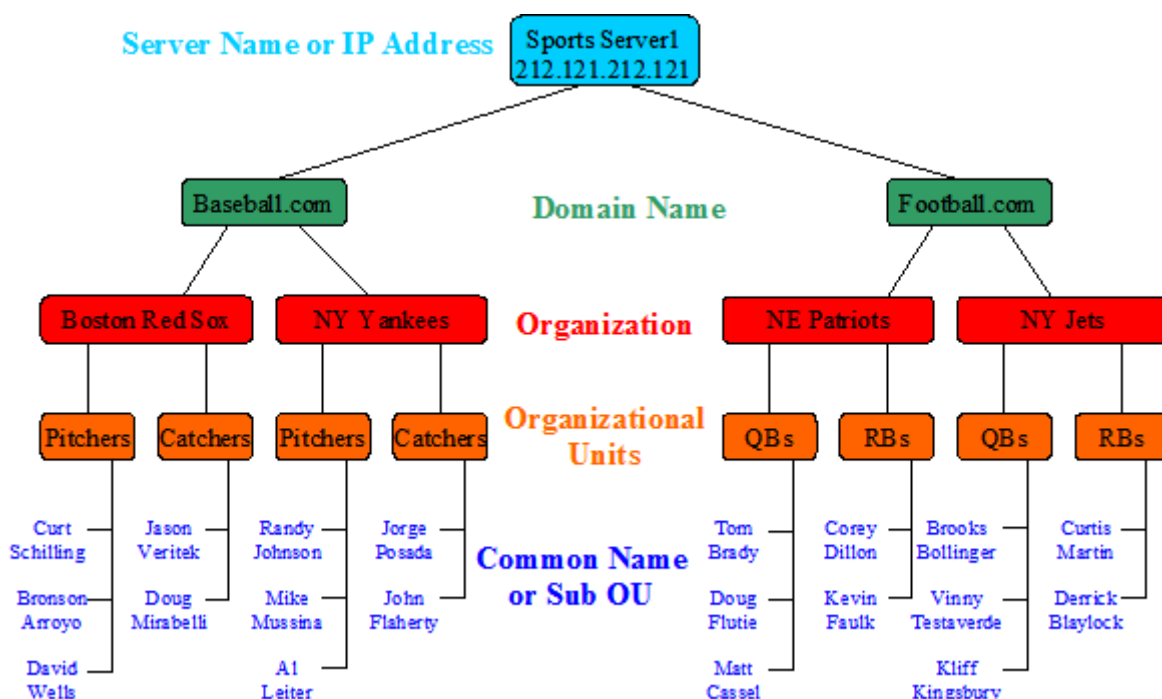
CN=David Wells, OU=Pitchers, O=Red Sox, DN=Baseball.com,
C=US.

Therefore, it is important to remember that the hierarchical structure order makes a difference when entering the information in the Ektron CMS400.NET.

NOTE

Here is a list of the abbreviations: CN = Common Name, OU = Organizational Unit, O = Organization, DN = Distinguished Name.

Below is a visual example of an LDAP hierarchical structure.



This chapter covers the following topics:

- "Using LDAP with Ektron CMS400.NET" on page 680
- "LDAP Screen Descriptions" on page 689
- "Disabling LDAP Authentication" on page 693

Using LDAP with Ektron CMS400.NET

NOTE

Active Directory and LDAP are not the same. While they can perform some similar functions, LDAP when used with Ektron CMS400.NET only verifies user login information and creates the user in the everyone group. Active Directory can be used to verify user login information only or it can become completely integrated with Ektron CMS400.NET. To learn more about using Active Directory with Ektron CMS400.NET, see "Active Directory Feature" on page 630

The following sections explain how to use LDAP with Ektron CMS400.NET


- "Enabling LDAP" on page 681
- "Adding an Organizational Unit During Setup" on page 682
- "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 683
- "Editing User Information in Ektron CMS400.NET" on page 688
- "Deleting Users" on page 688

Enabling LDAP

You enable LDAP through the Active Directory Setup screen. To enable the LDAP functionality in Ektron CMS400.NET, follow these steps. *See Also:* "The Active Directory Setup Screen" on page 689

IMPORTANT!

Before enabling LDAP in Ektron CMS400.NET, make sure your LDAP server is set up and ready for use. Be sure to include an administrator account for yourself. Once you enable LDAP, the only account available to access Ektron CMS400.NET without LDAP authentication is the BuiltIn account. For more information on the BuiltIn account, see "BuiltIn User" on page 30.

1. In the Workarea, navigate to the **Settings > Configuration > Active Directory > Setup screen**.
2. Click the **Edit** button (.
3. On the Active Directory Setup screen, choose **Enable LDAP Authentication**.
4. Fill in the following fields.

Field	Description	For more information, see
LDAP Server	The IP Address or Name of the LDAP server	
Port	The LDAP server port that Ektron CMS400.NET communicates with. When trying to figure out what port to use, it is best to consult the documentation that is provided with your Directory Service (such as, Novell, iPlanet, Microsoft or Red Hat)	
Organization	The name of your company or organization. For example, Ektron, Inc. This field can be blank if you enter a domain in the Domain field.	

Field	Description	For more information, see
Domain	The name of the domain you are using. For example, www.ektron.com. This should be the same name you used when you received your license key. This field can be blank if you enter a organization in the Organization field.	
Organizational Unit	The next levels below your Organization or Domain. These can include multiple levels of Organizational Units. For example, Content Editors, Marketing, East Coast.	
Add	Enter your the Organizational Units in the text field and click the Add link. When adding Organizational Units, the paths are comma separated and run from specific to general. For example, Content Editors, Marketing, East Coast. You do not add individual Common Names here. Only add the Organizational Units that contain the people that you want to have access to Ektron CMS400.NET.	<p>"Adding an Organizational Unit During Setup" on page 682</p> <p>To add a single individual from a different Organizational Unit, see "Adding User Information from an LDAP Server to Ektron CMS400.NET" on page 683</p>
Delete	Choose any Organizational Unit from the multi-selection box and click the Delete link.	

5. Click the Save button (.

Adding an Organizational Unit During Setup

Things to consider when adding Organizational Units are:

- Do I want everyone in that Organizational Unit (OU) to have access to Ektron CMS400.NET?

Once LDAP is enabled, users are added to the everyone group upon login. While everyone in the OU has access to Ektron CMS400.NET, it does not necessarily give every user the permissions to edit content. This can be controlled by setting up user groups, adding each user to the appropriate group and

assigning permission for each group. For more information on user groups, see ["Managing Users & User Groups" on page 113](#). For more information on assigning permissions, see ["Setting Permissions" on page 86](#).

- Are there users in other Organizational Units that need access?

Sometimes managers or editors are in a different OU and they need to be added manually or their OU needs to be added.

When adding an Organizational Unit, you might have several entries all covering the same hierarchical path. For example you might have:

- Pitchers,Players,Red Sox
- Players,Red Sox
- Red Sox

This allows you to authenticate people listed in Pitchers, in Players and in Red Sox.

Adding User Information from an LDAP Server to Ektron CMS400.NET

When using LDAP, there are three ways user information is added to Ektron CMS400.NET. The first is by having the user login, once LDAP is enabled. The user then appears in the Users list and is added to the Everyone group.

NOTE [After a user logs in there are still some fields on the Add User screen that can be filled in manually such as, first name and last name. For a description of these fields, see "Fill out the fields according to the table below" on page 684.](#)


The second is to add the user's LDAP information manually. See *Also:* ["Steps to Manually Add an LDAP User" on page 683](#).

The third way is a mix of browsing for the user then, manually completing the rest of the fields.





Steps to Manually Add an LDAP User

The following steps explain how to add an LDAP user manually.

1. Enable LDAP by following the instructions in ["Enabling LDAP" on page 681](#).

2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button ().
4. The Add a New User to the System screen appears.

Add a New User to the System

Username:


Organization

Organizational Unit

Domain

First Name:

Last Name:

User Language: English (U.S.) 

E-Mail Address:


☐ Disable Receiving of System Notification Email

(System notification sending email is currently disabled)

Fill out the fields according to the table below

Field	Description
Username	The username of the person logging in, as found on the LDAP server.
Organization	The name of your company or organization. For example, Ektron, Inc.
Organizational Unit	The next levels below your Organization. These can include multiple levels of Organizational Units. For example, Content Editors, Marketing, East Coast.
Domain	The name of the domain you are using. For example, www.ektron.com. This should be the same name you used when you received your license key. This field can be blank if you enter a organization in the Organization field.

Field	Description
First Name	The first name of the user.
Last Name	The last name of the user.
User Language	<p>Select the language in which the user will view Ektron CMS400.NET screens and messages. The language also determines the default value whenever a drop-down list of languages appears within Ektron CMS400.NET. The dropdown list of choices at this field is derived from the Language Settings screen, available from the Settings > Configuration folder. Do not confuse the system language with the user's ability to create and edit foreign editions of content. This field does not prevent a user from working with multiple language content.</p> <p>See Also: "Multi-Language Support" on page 442</p> <hr/> <p>Note: If the selected language is not English, French or German, it is only supported after you download the Ektron CMS400.NET Language Support Program from Ektron and translate the Web site.</p> <hr/>
E-Mail Address	Enter the email address of the user.
Disable Email Notification	<p>Select to disable the email notifications for the user. If you do, the user will not receive the automatic email notification described in "Automatic eMail Notification" on page 624. However, this field has no effect on the user's ability to receive instant email.</p>

- Click the **Save** button () to add LDAP users to Ektron CMS400.NET.
- The View Users in Group Everyone screen appears, displaying the new user and the other Ektron CMS400.NET users.

Using the Browse Feature to Add an LDAP User

Using the Browse LDAP feature makes it easier for you to add a user to Ektron CMS400.NET. This allows a more friendly and


intuitive way to find the exact username, domain/organization and organizational unit(s).

IMPORTANT





The default server IP/DNS name and port are taken from the settings specified in the **Configuration > Setup** page. These settings must be specified before connecting to the LDAP server. See Also: "Enabling LDAP" on page 681


IMPORTANT

An Organizational Unit that can see the user to be added, must be specified in the **Configuration > Setup** page before using the browse feature. See Also: "Enabling LDAP" on page 681

1. Enable LDAP by following the instructions in "Enabling LDAP" on page 681.
2. From the left side of the Workarea, click **Users**.
3. Click the Add Users button ().
4. The Add a New User to the System screen appears.

Add a New User to the System

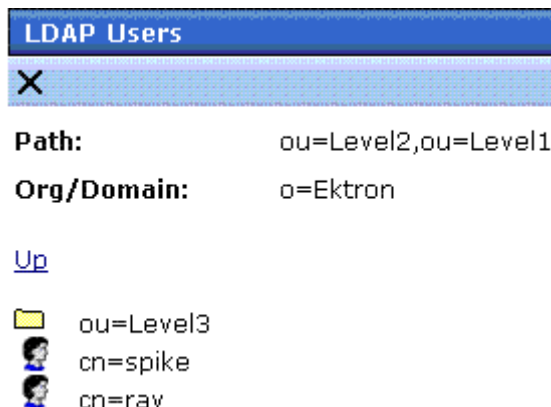





Username:	<input style="width: 90%;" type="text"/>
Organization	<input style="width: 90%;" type="text"/>
Organizational Unit	<input style="width: 90%;" type="text"/>
Domain	<input style="width: 90%;" type="text"/>
First Name:	<input style="width: 90%;" type="text"/>
Last Name:	<input style="width: 90%;" type="text"/>
User Language:	English (U.S.) 
E-Mail Address:	<input style="width: 90%;" type="text"/>

☐ Disable Receiving of System Notification Email
(System notification sending email is currently disabled)

5. Click the Browse LDAP button ().


6. The LDAP Explorer appears.



You can navigate the LDAP server's folders by clicking on the folder images. Each folder represents a different Organizational Unit (OU). When you choose an OU level, the users for that level appear.

NOTE In the LDAP Explorer, the Path and Org/Domain fields update dynamically as you navigate through the LDAP tree.

7. Select a User.
8. The Add User screen appears with the Username, Organization or Domain (depending on your LDAP service) and Organizational Unit fields completed.



9. Fill out the remaining information by using the table in the ["Steps to Manually Add an LDAP User" on page 683](#) section.
10. Click the **Save** button () to add the LDAP user to Ektron CMS400.NET.
11. The View Users in Group Everyone screen appears, displaying the new user and the other Ektron CMS400.NET users.

Editing User Information in Ektron CMS400.NET

It is important to note that **Ektron CMS400.NET** does not write to the LDAP server. While you can change all fields when editing a user in Ektron CMS400.NET, these changes also need to be made in the LDAP server.

Steps to Edit an LDAP User's Information

The following steps explain how to edit an LDAP user's information.

1. In the Workarea, click **Settings > Users**.
2. In the Username column, click a user to edit.
3. The View User Information screen appears.
4. Click the Edit button ().
5. Change the information as needed. For more information on the fields you can edit, see ["Fill out the fields according to the table below" on page 684](#).
6. Click Save ().

Deleting Users

If a user is deleted in an LDAP server, Ektron CMS400.NET does not automatically delete the user. However, the user's login fails because he cannot be authenticated.

You should delete the user from Ektron CMS400.NET using the Delete User function. See *A/so*: ["Deleting a User" on page 118](#)

NOTE

If you mistakenly delete all users with administrative privileges, you can still sign in using the builtin user's username and password. For more information, see ["BuiltIn User" on page 30](#).

LDAP Screen Descriptions

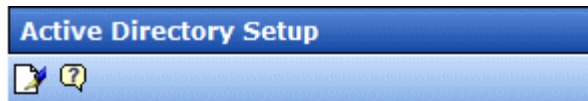
The LDAP feature uses the following screens:

- ["The Active Directory Setup Screen" on page 689](#)
- ["The View Users Screen" on page 690](#)

This section explains how to use each screen.

The Active Directory Setup Screen

The Active Directory Setup screen (illustrated below) lets you enable and disable the Active Directory or LDAP features, as well as determine other aspects of AD management, such as whether users and groups are automatically updated. To access the screen, click **Configuration -> Active Directory -> Setup** from the left panel of the Workarea.

**Active Directory Installed:****Active Directory/LDAP Authentication:**

LDAP Authentication Enabled

Active Directory Integration:

Disabled

Auto Add User:

Disabled

Auto Add User To Group:

Disabled

User Property Association**CMS Property Active Directory Property****EmailAddr1** mail**FirstName** givenName**LastName** sn**CMS Administrator Group Association****AD Group Name @ AD Domain**

Administrators @



Domain


All Domains

For a description of the fields, see the Active Directory section ["The Active Directory Setup Screen"](#) on page 653.





The View Users Screen

The View Users screen (illustrated below) lists all users in the Ektron CMS400.NET database. To access the screen, click **Users** from the left panel of the Workarea. To view more information for a user, click that user to move to the View User Information screen.

View Users in Group "Everyone"				
   				
<u>Username</u>	<u>Lastname</u>	<u>Firstname</u>	Language	<input type="checkbox"/> All
 admin	Administrator	Application	App Default	<input type="checkbox"/> 
 CSchilling	Schilling	Curt	App Default	<input type="checkbox"/> 
 idocwriter	Docwriter	John	App Default	<input type="checkbox"/> 
 jedit	Edit	John	App Default	<input type="checkbox"/> 
 ismith	Smith	John	App Default	<input type="checkbox"/> 
 tbrown	Brown	Tina	App Default	<input type="checkbox"/> 
 tjones	Jones	Tim	App Default	<input type="checkbox"/> 
 vs	vs	vs	App Default	<input type="checkbox"/> 

The View Users screen also provides a toolbar button () that lets you add LDAP users manually to the Ektron CMS400.NET database. This is useful if you want to add a single user from an Organization that is does not have the same Organizational Unit as the rest of your users, and you do not want to add any other users from that Organization.


The View User Information Screen




View User Information "CSchilling"	
   	
Username:	CSchilling
Organization	RedSox
Organizational Unit	Pitchers,Staff
Domain	
First Name:	Curt
Last Name:	Schilling
User Language:	English (U.S.)
E-Mail Address:	cschilling@baseball.com
System Notifications:	Receiving of E-Mail Enabled
(System notification sending email is currently disabled)	

The View User Information Screen displays the user's

- username
- organization
- organizational unit
- domain
- first and last name
- language
- email address and whether the user receives email notifications
- user groups
- user properties (if any)

The screen also displays the following buttons.

Button	Description
	Edit information on screen

Button	Description
	Delete user See Also: "Deleting Users" on page 688
	Return to previous screen
	Launches a help screen

Disabling LDAP Authentication

If you decide to disable LDAP authentication or integration, edit the Active Directory Setup screen and select **Disable Active Directory and LDAP Authentication**.

See Also: ["The Active Directory Setup Screen" on page 689](#)

Additional Information

Supporting Documents

You can find more detailed information about Ektron CMS400.NET in the following manuals:

- Ektron CMS400.NET Developer's Reference Manual
- Ektron CMS400.NET User Manual
- Ektron CMS400.NET Quick Start Manual
- Ektron CMS400.NET Setup Manual

Support

If you are experiencing trouble with any aspect of Ektron CMS400.NET, please contact the Ektron Support Team via our Web Site:

http://www.ektron.com/support/cms400_support.aspx

Sales

For questions and answers about purchasing Ektron CMS400.NET from Ektron, contact the sales department by sending an email to:

sales@ektron.com

Information

For general information about Ektron and its products, you may send an email to:

info@ektron.com

Ektron, Inc.
5 Northern Boulevard, Suite 6
Amherst, NH 03031 USA
Tel: +1 603.594.0249
Fax: +1 603.594.0258
<http://www.ektron.com>

Appendix A: List of Supported Languages

Language	Locale id value
Afrikaans	1078
Albanian	1052
Arabic (Algeria)	5121
Arabic (Bahrain)	15361
Arabic (Egypt)	3073
Arabic (Iraq)	2049
Arabic (Jordan)	11265
Arabic (Kuwait)	13313
Arabic (Lebanon)	12289
Arabic (Libya)	4097
Arabic (Morocco)	6145
Arabic (Oman)	8193
Arabic (Qatar)	16385
Arabic (Saudi Arabia)	1025
Arabic (Syria)	10241
Arabic (Tunisia)	7169

Arabic (U.A.E.)	14337
Arabic (Yemen)	9217
Azeri (Cyrillic)	2092
Azeri (Latin)	1068
Basque	1069
Belarussian	1059
Bulgarian	1026
Burmese	1109
Catalan	1027
Chinese (Hong Kong SAR PRC)	3076
Chinese (Macau SAR)	5124
Chinese (PRC)	2052
Chinese (Singapore)	4100
Chinese (Taiwan)	1028
Croatian	1050
Czech	1029
Danish	1030
Dutch (Belgium)	2067
Dutch (Netherlands)	1043
English (Australian)	3081
English (Belize)	10249
English (Canadian)	4105
English (Caribbean)	9225

English (Ireland)	6153
English (Jamaica)	8201
English (New Zealand)	5129
English (Philippines)	13321
English (South Africa)	7177
English (Trinidad)	11273
English (United Kingdom)	2057
English (US)	1033
English (Zimbabwe)	12297
Estonian	1061
Faeroese	1080
Farsi	1065
Finnish	1035
French (Belgian)	2060
French (Canadian)	3084
French (Luxembourg)	5132
French (Monaco)	6156
French (Standard)	1036
French (Switzerland)	4108
Gaelic (Ireland)	2108
Galician (Spain)	1110
German (Austria)	3079
German (Liechtenstein)	5127

German (Luxembourg)	4103
German (Standard)	1031
German (Switzerland)	2055
Greek	1032
Gujarati (India)	1095
Hebrew	1037
Hindi (India)	1081
Hungarian	1038
Icelandic	1039
Indonesian	1057
Italian (Standard)	1040
Italian (Switzerland)	2064
Japanese	1041
Kannada (India)	1099
Kashmiri (India)	2144
Kazakh	1087
Korean	1042
Korean (Johab)	2066
Latvian	1062
Lithuanian	1063
Lithuanian (Classic)	2087
Macedonian	1071
Malay (Brunei Darussalam)	2110

Malay (Malaysian)	1086
Manipuri	1112
Marathi	1102
Norwegian (Bokmal)	1044
Norwegian (Nynorsk)	2068
Polish	1045
Portuguese (Brazil)	1046
Portuguese (Standard)	2070
Punjabi (Gurmukhi - India)	1094
Romanian	1048
Russian	1049
Serbian (Cyrillic)	3098
Serbian (Latin)	2074
Sindhi	1113
Slovak	1051
Slovenian	1060
Spanish (Argentina)	11274
Spanish (Bolivia)	16394
Spanish (Chile)	13322
Spanish (Columbia)	9218
Spanish (Costa Rica)	5130
Spanish (Dominican Republic)	7178
Spanish (Ecuador)	12298

Spanish (El Salvador)	17418
Spanish (Guatemala)	4106
Spanish (Honduras)	18442
Spanish (Mexican)	2058
Spanish (Modern Sort)	3082
Spanish (Nicaragua)	19466
Spanish (Panama)	6154
Spanish (Peru)	10250
Spanish (Puerto Rico)	20490
Spanish (Traditional Sort)	1034
Spanish (Uruguay)	14346
Spanish (Venezuela)	8202
Sutu	1072
Swahili (Kenya)	1089
Swedish	1053
Swedish (Finland)	2077
Tamil (India)	1097
Tatar (Tatarstan)	1092
Telugu (India)	1098
Thai	1054
Turkish	1055
Ukrainian	1058
Urdu (India)	2080

Urdu (Pakistan)	1056
Uzbek (Cyrillic)	2115
Uzbek (Latin)	1091
Vietnamese	1066
Welsh (United Kingdom)	1106

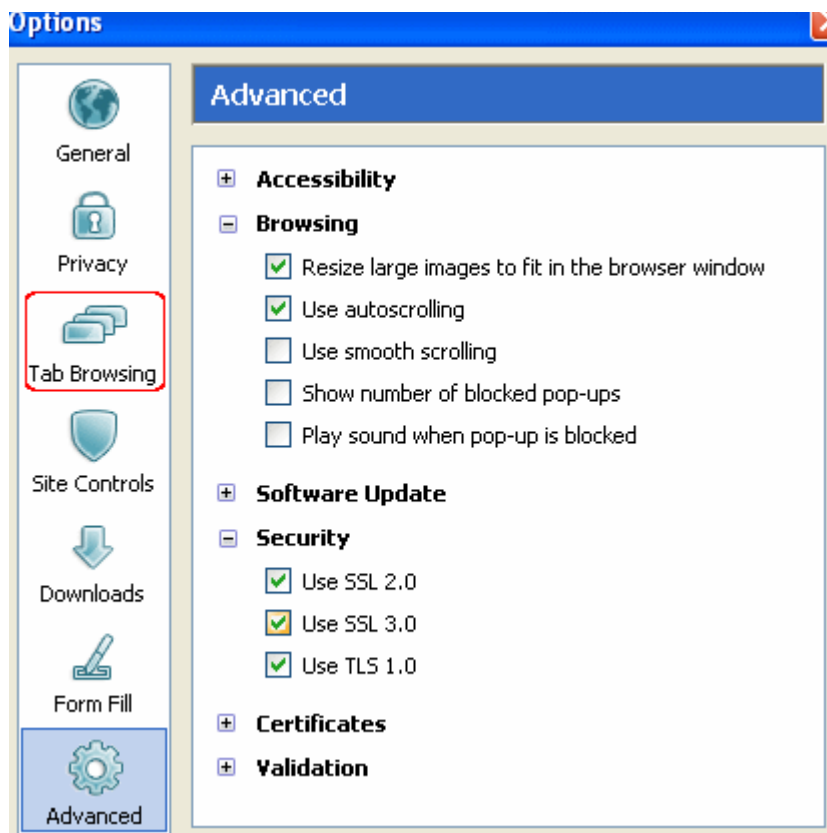
Appendix B: Browser Issues

This section explains how to use **Ektron CMS400.NET** with different browsers.

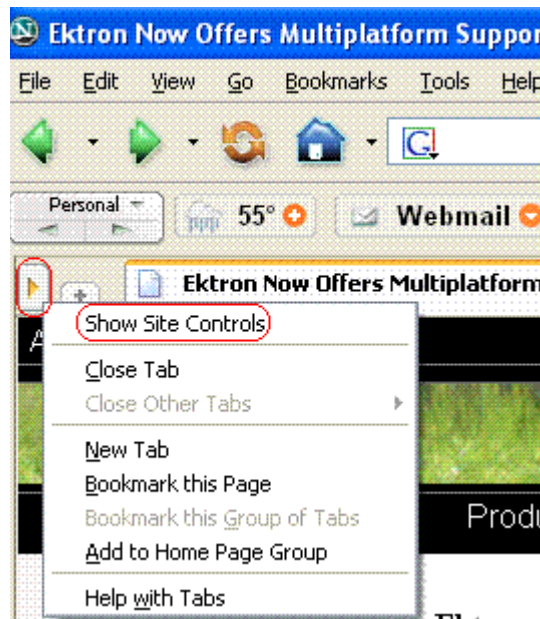
Netscape 8

To make sure the Netscape 8 browser works properly with **Ektron CMS400.NET**, follow these steps.

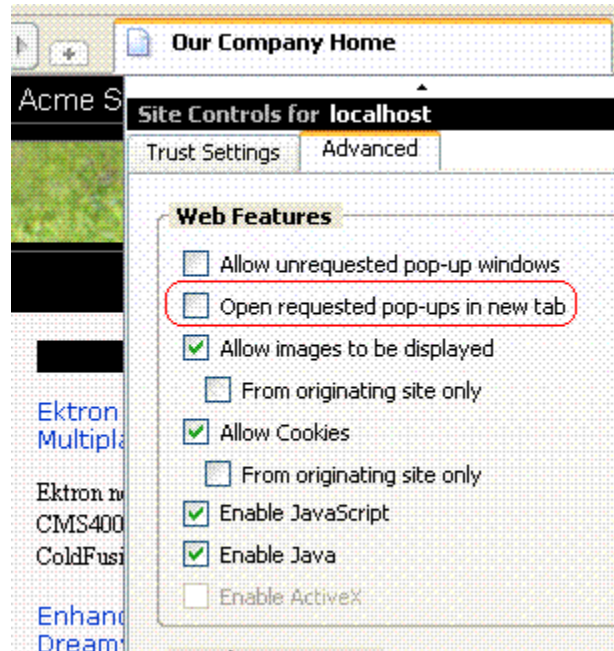
1. From the verb strip at the top of the Netscape 8 screen, click **Tools > Options**.
2. Select the **Tab Browsing** screen.



3. After **Open links from other applications in**, check a **new window**.
4. Makes sure the following options are unchecked.
 - **Open non-requested pop-ups in a new tab**
 - **Open a new tab instead of a new window**
5. Click **OK** to save the options.
6. Return to **Ektron CMS400.NET** running in the Netscape 8 browser.
7. Right click the triangle icon to the left of the tab (circled in red below).



8. Click **Show Site Controls**.
9. The Site Controls screen appears.
10. Click the **Advanced** tab.



11. Make sure **Open requested pop-ups in new tab** is unchecked.

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