

# Business

# **Ektron CMS400.NET Setup Manual**

Version 6.1 for .NET 2.0, Revision 5

Ektron® Inc.

5 Northern Blvd., Suite 6

Amherst, NH 03031

Tel: +1 603-594-0249 Fax: +1 603-594-0258

Fax: +1 603-594-0258 Email: sales@ektron.com

http://www.ektron.com

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Version 6.1 for .NET 2.0, Revision 5

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# Securing Ektron CMS400.NET

# **Security Checklist**

	The following is a checklist of things an Administrator must do to secure <b>Ektron CMS400.NET</b> .
	☐ Change Admin user password
	☐ Change builtin user password
IMPORTANT!	If you changed the builtin user password during the site setup, you do not need to change it again. See "Editing Builtin" on page ii for additional information.
	☐ Remove Sample users
IMPORTANT!	Some users in this list might not appear in your User list. This depends on which version of the software you have installed.
	☐ Admin2
	☐ jedit
	☐ tbrown
	☐ jsmith
	□ vs
	☐ EkExplorerUser
	☐ Explorer

#### Additional Information

You *do not* need to make these changes if you are using the CMS400 for demonstration or evaluation purposes. These changes should be completed once the decision is made to purchase the product and go live with your site.

#### **IMPORTANT!**

Ektron recommends creating your own Administrator user and deleting the Admin user.

#### IMPORTANT!

Ektron recommends deleting any users from the CMS400 that are not needed on the system.

#### IMPORTANT!

By default, when the Ektron Explorer client is installed, the Explorer or EkExplorerUser username and password are also installed. Client-side users should use their Ektron CMS400.NET username and password when using the Ektron Explorer. To learn how to change this information, see the Administrator Manual section "Ektron Explorer" > "Configuring Ektron Explorer."

#### **Editing Builtin**

#### **IMPORTANT!**

The "builtin" user does not appear in the Users list. This user appears on the application setup screen.

To change the builtin account information, follow these steps.

- 1. In the Workarea, click **Settings** > **Configuration** > **Setup**.
- Click the Edit button ( ).
- Locate the Built In User field.
- 4. Edit the built in user information by changing the username and password.
- 5. Click the Update button ( ).

#### NOTE

If you cannot sign in to **Ektron CMS400.NET** because the builtin user password was changed and you don't know the new password, use the BuiltinAccountReset.exe utility. This resets your **Ektron CMS400.NET** user \password to Builtin \ Builtin. This utility is located in c:\Program Files\Ektron\CMS400v6x\Utilities.

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# System Requirements

The following components are required when developing or viewing an Ektron CMS400.NET based application.

- "Server Requirements" on page 1
- "PC Client Requirements" on page 2
- "Apple Macintosh Client Requirements" on page 3
- "Optional Software" on page 4

# Server Requirements

Component	Requirements
Recommended hardware configuration	<ul> <li>Intel® Pentium® 4 supporting Hyper-Threading or Intel® Xeon® processor (with 800MHz bus)</li> <li>1 GB RAM or higher</li> <li>RAID array for hard drives</li> </ul>
Web server operating system	Microsoft ® Windows® 2003 Server recommended Microsoft ® Windows® 2000, XP Professional  Note: XP Home does not support IIS.
Web application server	<ul> <li>Microsoft .NET ™ Framework 2.0 (required)</li> <li>Microsoft Active Server Pages</li> <li>Macromedia ColdFusion MX or higher</li> <li>PHP</li> <li>JSP</li> </ul>

Component	Requirements
Web server	Microsoft® Internet Information Server (IIS) 4.0 or higher
Database	Any database listed below.
	Important: Ektron CMS400.NET does not support mixed case databases.
	SQL™ Server 2005
	SQL™ Server 2005 Express
	Oracle® Database 10 <i>g</i>
	<ul> <li>SQL™ Server 2000 (Enterprise or Standard version)</li> </ul>
	Microsoft ® MSDE 2000

# PC Client Requirements

Component	Requirements
Operating system	Any IBM-PC compatible system running Windows (suggested minimum: Pentium 166 MHz or faster with 64MB of RAM)
Browsers for viewing	All major browsers including:
	Microsoft ® Internet Explorer 3.0 through 6.0
	Netscape Navigator ® Version 3.0 through 7.2
	Mozilla Firefox 1.0

Component	Requirements
Browsers for editing	Mozilla Firefox 1.0
	Microsoft® Internet Explorer 5.0 through 6.0
	Netscape ® 7.2
	Note: If using Netscape, IE 5.0 through 6.0 must be installed.
	Note: If using Firefox, uncheck the Block Popup Windows setting.  To access this setting, go to Tools > Options > Content.
	Note: When using the Document Management feature, you must use a browser that supports ActiveX.
	Important: For issues when using Microsoft Windows Server 2003 as a client, see "Using Microsoft Windows Server 2003 as a Client (Web Folders Setup)" on page 98.
Hardware	Any IBM-PC compatible system running Windows
	(suggested minimum requirements: Pentium 166 MHz or faster with at least 64MB of RAM)
Web development tools	Visual Studio 2005

# Apple Macintosh Client Requirements

Component	Requirements
Operating system	MAC OS X
Browsers for viewing	All major browsers including:  Microsoft ® Internet Explorer  Netscape Navigator ®  Mozilla Firefox 1.0

Component	Requirements
Browsers for editing	<ul> <li>Apple Safari (Recommended)</li> <li>Mozilla Firefox 1.0</li> <li>Microsoft® Internet Explorer</li> <li>Netscape ®</li> <li>Important: If you use any browser other than Apple Safari, a text box appears in place of the WYSIWYG Integrated Macintosh Editor.</li> </ul>
Hardware	Apple Macintosh

# **Optional Software**

Component	Requirements
Web development tools	Visual Studio 2005 Macromedia HomeSite Adobe Coldfusion Studio Adobe Dreamweaver Microsoft FrontPage NotePad Visual Web Developer 2005 Express For Web site development Visual C# 2005 Express and Visual VB 2005 Express For Plug-in Extensions creation Adobe Dreamweaver

**Note** Ektron does not guarantee support of beta releases for components listed above.

# **Preparing for Windows XP SP2**

Microsoft Windows XP Service Pack 2 includes significant changes affecting **Ektron CMS400.NET** security, especially in regard to the installation of the eWebEditPro ActiveX control. The most significant change affects the eWebEditPro+XML editor in data design or data entry modes. To work around this change, configure **Ektron CMS400.NET** to allow pop-up windows for automatic download and installation.

#### More Information on Windows XP Service Pack 2

For more information on Windows XP Service Pack 2, visit the Microsoft site at www.microsoft.com/technet/prodtechnol/winxppro/maintain/winxpsp2.mspx. One article on that site of particular interest to developers is "Changes to Functionality in Microsoft Windows XP Service Pack 2". Part 5 of that article, "Enhanced Browsing Security," details changes to Internet Explorer.

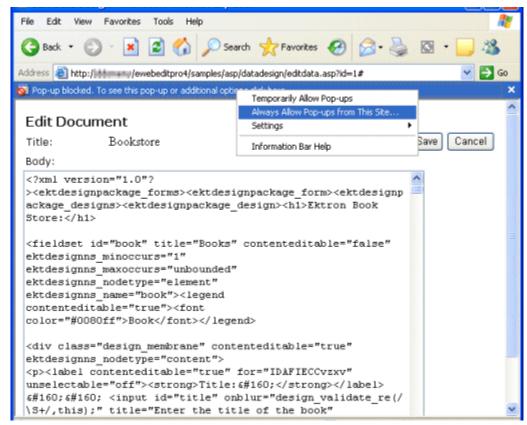
## Disabling the Popup Blocker

Pop-up windows are used to initially install the editor in Internet Explorer (IE) and by other features, such as selecting an image and setting Section 508 Data Table properties. By default, Windows XP SP 2 blocks pop-up windows. For Ektron products to operate effectively, allow pop-up windows for web sites that host Ektron products.

#### **Enabling Popup Windows**

When a Web page in IE running on Windows XP Service Pack 2 (XPSP2) attempts to open a pop-up, the Information Bar appears at the top of the page. The message on the Information Bar is **Pop-up blocked. To see this pop-up or additional options click here...** 

To allow proper operation of the editor, enable pop-up windows for the Web site. To do so, click the Information Bar and select **Always Allow Pop-ups from This Site**.



For easier administration, add the Web site as a Trusted site. By default, this change disables the pop-up blocker.

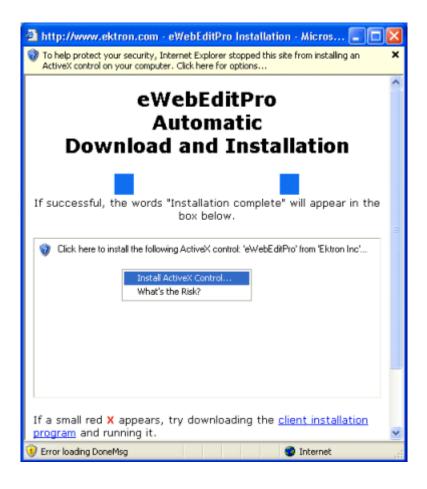
#### Download and Installation with Windows XP SP2

The installation of the Ektron editor is only required the first time it is used and for every upgrade. The automatic installation supported in IE uses a pop-up to walk the user through the process. Therefore, the first step is to enable pop-up windows (see "Enabling Popup Windows" on page 5). An additional step to install the editor requires an extra mouse click by the user.

If you are an administrator, you may want to configure client computers to avoid these extra steps. One simple way is to add the Web site that hosts Ektron products as a Trusted Site.

When installing the editor, the user should follow these steps.

- 1. When the Automatic Download and Installation page appears, click the **Install** button.
- 2. When the next window appears, the Information Bar displays this message:
  - To help protect your security, Internet Explorer stopped this site from installing an ActiveX control on your computer. Click here for options...
- In place of the editor, the following message appears.
   Click here to install the following ActiveX control: 'eWebEditPro' from 'Ektron Inc'...
- 4. Click on either message and select **Install ActiveX Control...**



# Development and Staging Configurations

This chapter presents five examples of how to configure your **Ektron CMS400.NET** Web site. Reading this will help you decide which configuration is the best fit for your particular situation.

Configuration	Properties	Implementation Guidelines
Virtual Staging	Use CMS400.NET's approval process and scheduled publishing of content to manage when content goes live	"Virtual Staging" on page 11
Multiple sites, Same Server, Same Database	<ul> <li>Production and development/staging sites use separate copies of Ektron CMS400.NET but reside on same server and point to same database</li> <li>Ektron CMS400.NET's settings, managed content, and library files are identical between sites</li> </ul>	"Same Server, Same Database" on page 14
Multiple sites, Same Server, Different Databases	<ul> <li>Production and development/staging sites use separate copies of Ektron CMS400.NET's display layer, reside on same server, but point to different databases</li> <li>Changes to content, configuration, or library files made in one site must be copied to other site</li> </ul>	"Same Server, Different Databases" on page 12

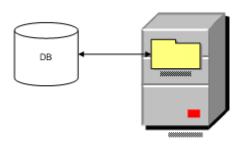
Configuration	Properties	Implementation Guidelines
Multiple sites, Separate Servers, Same Database	<ul> <li>Production and development/staging sites reside on separate servers, which point to the same database.</li> </ul>	"Separate Servers, Same Database" on page 15
	<ul> <li>Ektron CMS400.NET settings, content, and library files are identical between sites.</li> </ul>	
	<ul> <li>Changes to templates must be copied between servers.</li> </ul>	
Multiple sites, Separate Servers, Separate Databases	Production and development/staging sites are installed to separate servers and point to different databases	"Separate Servers, Separate Databases" on page 17
	<ul> <li>Changes to content, configuration, or files must be copied between sites.</li> </ul>	

After deciding which configuration is best, read the following sections to learn about procedures for working with multiple sites, servers, and databases.

- "Installing Ektron CMS400.NET on Several Servers" on page 18
- "Copying the Site and Database to Other Environments" on page 20
- "Moving Files Among Servers After Installation" on page 21

# Virtual Staging

Case 1: Virtual Staging

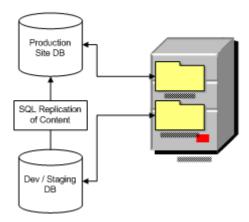


Staging is accomplished through Ektron CMS workflow process.

- Best choice when changes to templates and library files assets are infrequent
- No special implementation guidelines; just an installation on one server
- When upgrading this type of site, make a temporary copy of the site (both display layer and database) on a separate server to test the upgrade

## Same Server, Different Databases

Case 2: Same Server, Different DBs



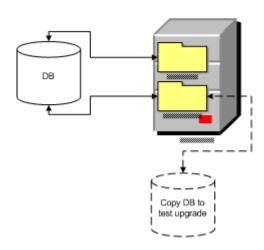
To set up this configuration, follow these guidelines.

- To maintain file paths between sites, follow these steps.
  - Create separate Web Sites in IIS.
  - Assign different ports to the production and development/ staging sites. For example, the production site is http:// www.example.com, and the development/staging site is http:// www.example.com:8080.
  - Separate the databases for isolation.
    - \* One database is the master, and the other is a copy
    - \* Only edit content in the site connected to the master database
    - \* Remove the **Ektron CMS400.NET** login page from the site connected to the copy database
- To copy the Ektron CMS400.NET database, your best choice is Ektron's Site Replication feature. This is described in the Ektron CMS400.NET Administrator manual section "Managing Your CMS400 System" > "Site Replication."
  - If you have not implemented Site Replication, copy site content using a replication tool for the database.

- SQL Server 2000 SDK Replication see http:// msdn.microsoft.com/library/en-us/replsql/ replover\_694n.asp
- Oracle 9i Replication Technical White Paper see http:// www.oracle.com/technology/products/oracle9i/pdf/ oracle9i replication twp.pdf
- Library files Make the Ektron CMS400.NET uploadedimages/ and uploadedfiles/ folders IIS virtual directories that point to the same physical directory. This procedure is explained in the Ektron CMS400.NET Administrator Manual section "Load Balancing" > "Configuring Load Balancing without Site Replication" > "Set Up Virtual Directories for Two Web Sites."
- Templates and other file system assets The best way to move these is Site Replication. If that was not implemented and changes to these items are infrequent, you can manually copy them. For automated replication, use a product such as Microsoft Application Center.
- Upgrading Ektron CMS400.NET To test an upgrade, make a temporary copy of the site's display layer on a separate server connected to the development/staging database. If the development/staging database is the master, back it up before upgrading.

### Same Server, Same Database

Case 3: Same Server, Same DB



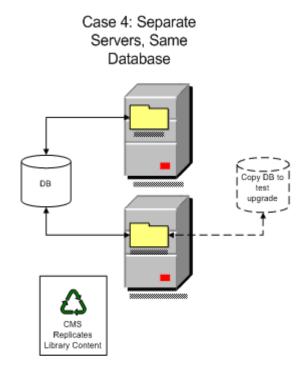
To set up this configuration, follow these guidelines.

- To maintain file paths between sites, follow these steps.
  - Create separate Web Sites in IIS.
  - Assign different ports to the production and development/ staging sites. For example, the production site is http:// www.example.com, and the development/staging site is http:// www.example.com:8080.
- Both sites must use the same pathing relative to the Web root. For example, www.example.com\Workarea\applicationAPI.asp and dev.example.com\Workarea\applicationAPI.asp.
- Because both sites use the same database, editing and publishing content on one site affects the other site. As a result, the development/staging server always has the freshest content.
- Make the Ektron CMS400.NET uploadedimages/ and uploadedfiles/ folders IIS virtual directories that point to the same physical directory.

This procedure is explained in the **Ektron CMS400.NET**Administrator Manual section "Load Balancing" > "Configuring"

- Load Balancing without Site Replication" > "Set Up Virtual Directories for Two Web Sites."
- Template changes must be copied between sites. The best way to copy site templates and other file system assets is Site Replication. This is described in the Ektron CMS400.NET Administrator manual section "Managing Your CMS400 System" > "Site Replication."
  - If that was not implemented and changes to these items are infrequent, you can manually copy them. For automated replication, use a product like Microsoft Application Center.
- 5. To test and QA an upgrade, make a temporary copy of the site's display layer on a separate server connected to the development/staging database.
  - If the development/staging database is the master, back it up before upgrading.

## Separate Servers, Same Database

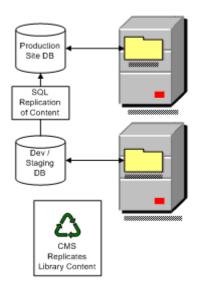


To set up this configuration, follow these guidelines.

- Configure Ektron CMS400.NET's Load Balancing feature to copy uploaded images and files between the servers.
  - This procedure is explained in the **Ektron CMS400.NET**Administrator Manual section "Load Balancing" > "Configuring Load Balancing without Site Replication" > "Set Up Virtual Directories for Two Web Sites."
- The best way to move site templates and other file system assets is Site Replication. This is described in the Ektron CMS400.NET Administrator manual section "Managing Your CMS400 System" > "Site Replication."
  - If that was not implemented and changes to these items are infrequent, you can manually copy them. For automated replication, use a product like Microsoft Application Center.
- When upgrading Ektron CMS400.NET, follow these steps.
  - Back up the file system of the development/staging server
  - Make a temporary copy of the production server database
  - Switch the development/staging site to use the copy
  - Test and QA the upgrade on the development/staging server

# Separate Servers, Separate Databases

Case 5: Separate Servers, Separate Databases



To set up this configuration, follow these guidelines.

- Both sites must have the same pathing relative to the Web root, for example, www.example.com\Workarea\applicationAPI.asp and dev.example.com\Workarea\applicationAPI.asp.
- Separate the databases for isolation.
  - One database is the master, and the other is a copy
  - Only edit content in the site connected to the master database
  - Remove the Ektron CMS400.NET login page from the site connected to the copied database
- The best way to copy site templates and library files is Site Replication. This is described in the Ektron CMS400.NET Administrator manual section "Managing Your CMS400 System" > "Site Replication."

If that was not implemented and changes to these items are infrequent, you can manually copy them. For automated replication, use a product like Microsoft Application Center.

 To copy the Ektron CMS400.NET database (containing HTML and XML content), your best choice is Ektron's Site Replication feature.

If you have not implemented Site Replication, copy site content using a replication tool for the database.

- SQL Server 2000 SDK Replication see http:// msdn.microsoft.com/library/en-us/replsql/ replover\_694n.asp
- Oracle 9i Replication Technical White Paper see http:// www.oracle.com/technology/products/oracle9i/pdf/ oracle9i replication twp.pdf
- Make the Ektron CMS400.NET uploadedimages/ and uploadedfiles/ folders IIS virtual directories that point to the same physical directory.

This procedure is explained in the Ektron CMS400.NET
Administrator Manual section "Load Balancing" > "Configuring Load Balancing without Site Replication" > "Set Up Virtual Directories for Two Web Sites."

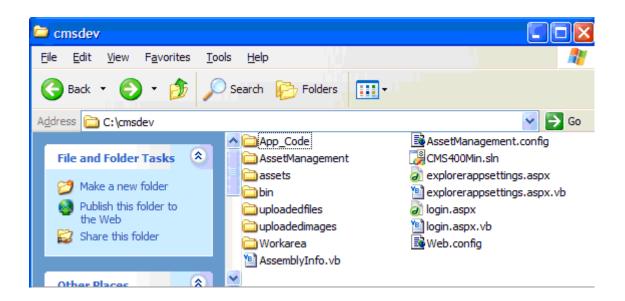
- When upgrading Ektron CMS400.NET, follow these steps.
  - Back up the file system of the development/staging server
  - Make a temporary copy of the production server database
  - Switch the development/staging site to use the copy
  - Test and QA the upgrade on the development/staging server

## Installing Ektron CMS400.NET on Several Servers

Perform these steps on the development server.

- 1. Download and run the Ektron CMS400.NET installation file, CMS400.exe. (This procedure is fully documented in "Running the Installation and Setup Program" on page 75.)
- 2. In Windows Explorer, create a folder to be used for development (for example, c:/cmsdev).
- Run the Site Setup utility by clicking Start > Programs >
   Ektron > Utilities > CMS400 Site Setup. This installs the site
   on the development server. (This procedure is fully
   documented in "Setting up a Site" on page 81.)

- At the **Setup Type** page, select **CMS 400 (Complete)**.
- On the Site Setup screen, at the Select Site dropdown, select the site you created in Step 3, dev.ektron.com. At Select Host, select the host you entered for dev.ektron.com.
- On the Site Path Directory screen, browse to the C:\cmsdev folder.
- On the Host screen, enter http://dev.ektron.com or an IP address.
- The following windows prompt you to define the Asset Storage Location. Enter C:\assetlibrary\cmsdev and C:\assetcatalog\cmsdev.
- 4. The Database Setup utility begins. (This procedure is fully documented in "Setting up a Database" on page 91.)
  - Enter your database name, cmsdev to continue the example. (Do not leave it as localhost.)
  - Enter your database server information, then the host, user and password.
  - The database is created.
- 5. The cmsdev folder should now look like this.



The site is ready for use. Open Internet Explorer and go to http://dev.ektron.com/login.aspx to test the site. Log in to make sure the database is working.

6. Using steps 1 through 5 above, install sites to your staging and production servers.

# Copying the Site and Database to Other Environments

Once your project is ready to be tested in house, move the site to a staging server. When the project is ready to go live, move the site to a production (live) server.

You can use the same database for all environments. Back up that database often to keep it safe. Alternatively, create a separate database for each server. For more information about how to configure your **Ektron CMS400.NET** Web site, see "Development and Staging Configurations" on page 9.

#### **Tips on Creating Additional Environments**

To create new environments, follow these steps.

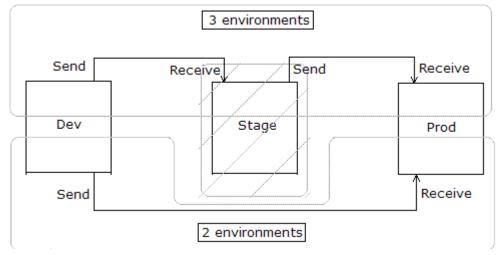
- 1. On the same server or a separate server, create new folders for **Ektron CMS400.NET**: c:/cmsstage and/or c:/cmsproduct.
- 2. In IIS, create a new domain for each server. http://stage.ektron.com points to c:/cmsstage and http://www.ektron.com points to c:/cmsproduct.
- 3. If all environments are on the same server, you don't need to copy other folders. But, if you are using a separate server for each environment, copy the c:/assetcatalog and c:/assetlibrary folders to the other servers.
- 4. For the database, access the SQL manager and make a backup of the development database. Then, create new databases for staging and production. Finally, restore the backup of the development database to the staging and production databases.
- 5. In the staging and production environments, open web.config. Then, update the database connection information so that it points to the new databases.

6. Test the staging and production environments.

# Moving Files Among Servers After Installation

After initial setup, you can copy additional files among servers manually or use Site Replication.

You can set up Site Replication to accommodate two or three servers, as illustrated below. Once Site Replication is set up, you can replicate all files, assets, and the database. Or, you can replicate files and assets but not the database.



To set up Site Replication for this purpose, follow these guidelines.

(To learn about Site Replication, see the **Ektron CMS400.NET** Administrator manual section "Managing Your CMS400 System" > "Site Replication.")

#### **Setting up Site Replication for Two Servers**

Follow these steps when your configuration consists of two servers, staging and production.

- 1. On the development server, install Site Replication as a Sending server.
- 2. On the production server, install Site Replication as a Receiving server.

#### **Setting up Site Replication for Three Servers**

Follow these steps when your configuration consists of three servers: development, staging, and production.

- On the development server, install Site Replication as a Sending server.
- On the staging server, install Site Replication as a Receiving server.
- Test this configuration and make sure it works.
- 4. Run the installation again on the Staging Server, but this time, set it up as a Sending server.
- 5. On the Production server, install Site Replication as a Receiving server.

# **Upgrading Ektron CMS400.NET**

The upgrade procedure copies **Ektron CMS400.NET**'s latest features to your Web server. **cms400.NET** is installed to its own folder, **cms400v6x**. This means it can coexist on the same machine with previous versions -- the template directories are independent.

#### NOTE

For *Site Replication* users only - If you upgrade a staging server from version 5.2 to 6.0 but don't choose to upgrade the production server, you need to complete some steps to make the two systems compatible. This procedure is explained in "Updating a Site Replication Production Machine after Upgrading from 5.2 to 6.0" on page 63.

#### The Base Folder

The upgrade installs a base folder (C:\\Program
Files\Ektron\CMS400v6x), which provides a template for setting up
Ektron CMS400.NET Web sites. The Site Setup utility uses the files in the base folder to create and upgrade Ektron CMS400.NET sites.

The base folder contains the following subfolders.

Subfolder	Includes
AssetLibrary	Default Asset Management files for CMS400Demo site
Bin	Required .NET assemblies for Ektron CMS400.NET
CMS400demo	A sample site that demonstrates the use of Ektron CMS400.NET
CMS400Min	A minimal set of files site that is best for new integrations
DMS400	Folders and files for the Document Management Functionality

Subfolder	Includes	
Documentation	Documentation. The site setup procedure copies this directory to the workarea directory when setting up a site.	
EktronAsyncProce ssor_Service	Files needed to add Asynchronous Processor for Web Alerts	
SiteSetup	The sitesetup.exe utility and the needed database setup scripts	
StudioHelp	Files necessary for adding the API help to Visual Studio 2005	
Utilities	Utilities for	
	database upgrade	
	database application strings update	
	email encrypt password tool	
	a setup Sharepoint Portal	
	Asset Management Registration tool	
	Load Balancing service files	
Workarea	Scripts used for the Workarea	
	Note: The contents of this folder are later copied to a Web site folder, typically in the Web server's web root. The sample provides a good way to learn how to work with an Ektron CMS400.NET site. An alternative is the minimum database. Use this when you understand how to create a site and do not want to place extra, sample files on your server.	

# The Upgrade Procedure

Upgrading involves the following tasks.

- 1. Install the new files to the new directories. See Also: "Running the Installation and Setup Program" on page 75
- 2. Copy these folders to the site directory.

- bin
- workarea
- cms400demo
- Documentation
- Update the web.config file with new settings.
- Update your databases using the upgrade and language update utilities. See Also: "Performing the Upgrade" on page 26
- 5. If you are upgrading from Release 5.0 or later, ignore this step and proceed to Step 6.
  - Otherwise, create a new DSN for each database. See "Creating a New DSN" on page 58.
- If needed, modify the site to use the server controls. See Also: Ektron CMS400.NET Developer Manual section "Ektron CMS400.Net Server Controls" > "Making the Server Controls Available" > "Updating the Server Controls"

#### NOTE

After you upgrade **Ektron CMS400.NET**, you may notice that, for some content that inherits the following property from their folders, the field is not checked: **The content in this folder is private and can only be viewed by authorized users and members.** To resolve this problem, edit the content's **View Permissions for Content** screen and manually check the box.

Before you can check the checkbox, you must disable inheritance. After checking the box, enable inheritance.

#### NOTE

The upgrade automatically starts the IIS Indexing service.

This chapter walks you through the upgrade process.

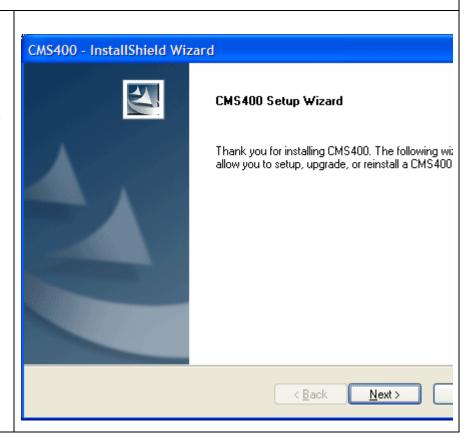
See Also: "Database Entry Implications When Restoring or Moving a Ektron CMS400.NET Database" on page 47

# Performing the Upgrade

- Follow the steps of the installation procedure, "Running the Installation and Setup Program" on page 75.
   These steps instruct you to install Ektron CMS400.NET and restart your server. Return to step two when the Site Setup Selection appears.
- The Setup wizard appears. Choose Upgrade Site/ Reinstall.

(If this screen does not appear, launch it by following this path from the Windows Start menu:

Start > Programs > Ektron > CMS400 > Utilities > Site Setup)



- The Setup Type screen appears. Choose an option to upgrade.
- CMS400 (Complete) Choose this option if you are Installing a New CMS400 installation.
- CMS400 Database
   Setup Choose this option to set up a new database.
- Upgrade / Reinstall

   Choose this option to upgrade or Rein

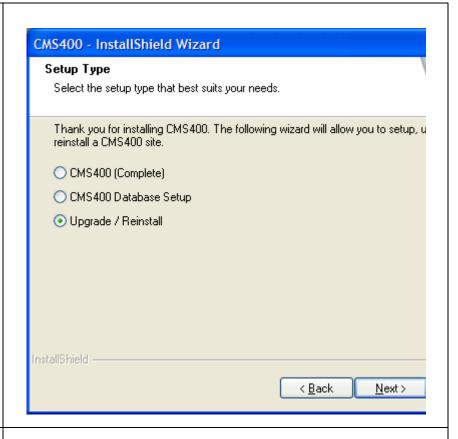
stall you CMS400.

4. A message recommends backing up your Web site before proceeding.

**Important!** Ektron strongly urges you to do this.

If you back up and then encounter any problems during installation, you can return your site to its state before the installation.

After backing up your site, click **OK** to proceed.



#### CMS400 - InstallShield Wizard

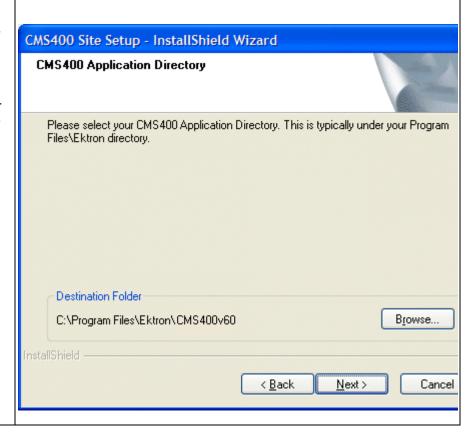


Ektron recommends that you backup your site and database prior to any upgr

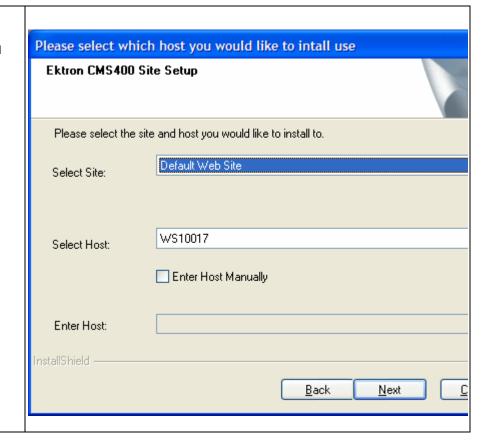


5. Choose an application directory. If you are not sure, use the default (C:\\Program Files\
Ektron\CMS400v6x).

This directory stores **Ektron CMS400.NET** components and utilities.



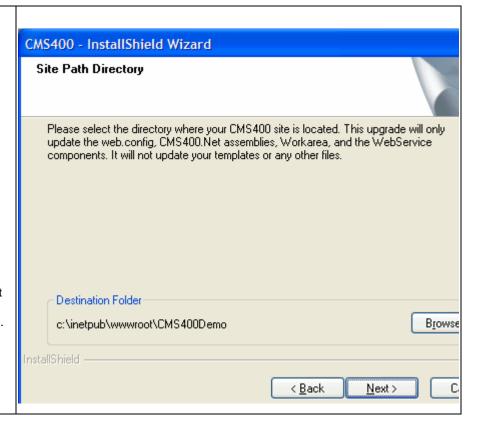
6. The **Select Host** screen appears. Select the site and host.

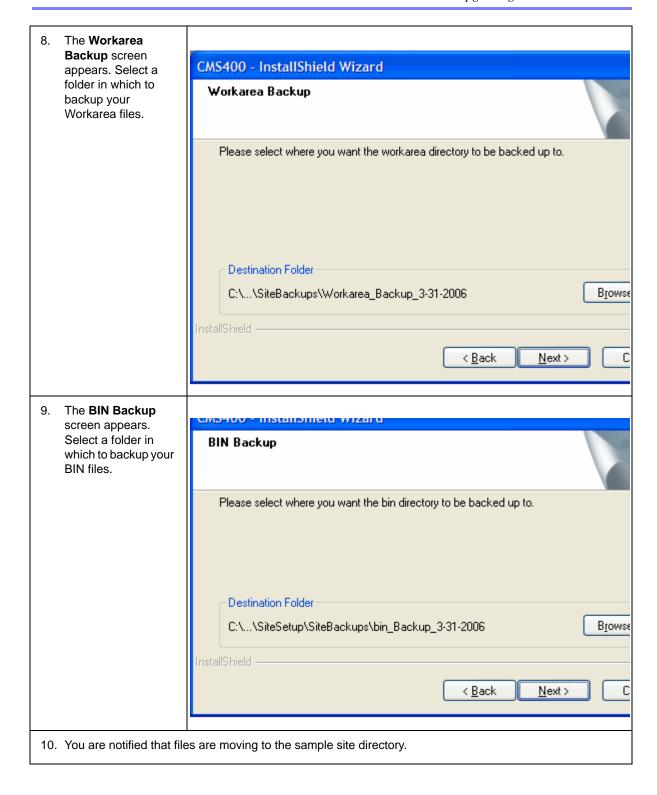


7. Choose a site path directory. If you are not sure, use the default (webroot/cms400demo).

The site directory maintains Web site templates, the CMS400 Workarea directory, etc.

Note that the upgrade only updates the web.config file, Ektron CMS400.NET assembly files, Ektron CMS400.NET script files, and Web Service components. It does not update your templates nor other files not mentioned above.





11. The **Host** screen appears. Enter the CMS400 - InstallShield Wizard name of the host screen you will use Host to access the site. If you are unsure, use the default. What is the server host name (including subfolder) you will be using to access this site? If you are unsure, please use the default. http://localhost/CMS400Example < Back Next> 12. The Choose **Destination Location** CMS400 - InstallShield Wizard screen appears. Enter the path to Choose Destination Location your Select folder where setup will install files. AssetManagement Directory. Please enter the the path to your current AssetManagement Directory. C:\Inetpub\www.root\CMS400Example\AssetManagement Brow < Back Next>

- 13. You are notified that files are moving to Asset Management location.
- 14. Your web.config file is updated with information needed to run Ektron CMS400.NET.

  Only the section of the file between the <appsettings> tags and the section within <a href="http://www.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.neediles.ne

Note: In the web.config file, the default setting for EnableMultilingual is off. Also, the DefaultContentLanguage is English (1033).

15. The Site Setup Completion Screen appears. Click Finish. The Database Upgrade Launches.

## **What Happens Next?**

After upgrading your site and rebuilding the solution, you are ready to use **Ektron CMS400.NET**.

If you did not run the database upgrade or language update during the installation, you need to do it manually. The next sections explain how to do that.

# **Upgrading Your Database**

If the database upgrade was unsuccessful during installation, or you chose to do it outside of the install, you need to manually upgrade your database. Use the Database Upgrade utility supplied with the installation program to do so.

See Also: "Database Entry Implications When Restoring or Moving a Ektron CMS400.NET Database" on page 47

## **Performing the Database Upgrade**

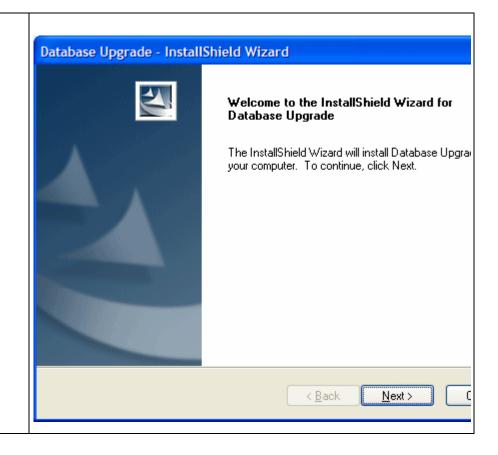
#### WARNING!

Ektron recommends backing up your database before performing an upgrade. For information on backing up a database, see "Backing Up Databases" on page 38.

To perform the database upgrade:

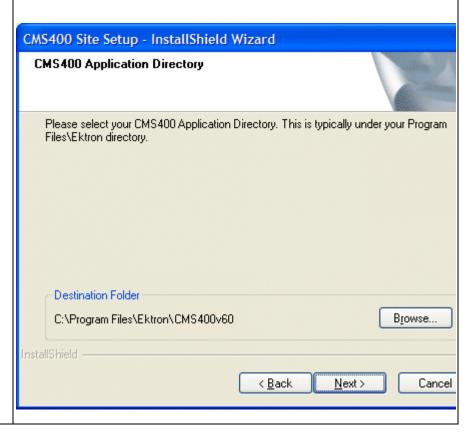
Click the Windows Start button then follow this path: Programs > Ektron > CMS400 > Utilities > Data-base Upgrade. (If this path does not work, click the dbupgrade.exe file, located under the C:\Program Files\Ektron\CMS400v6x\Utilities folder.)

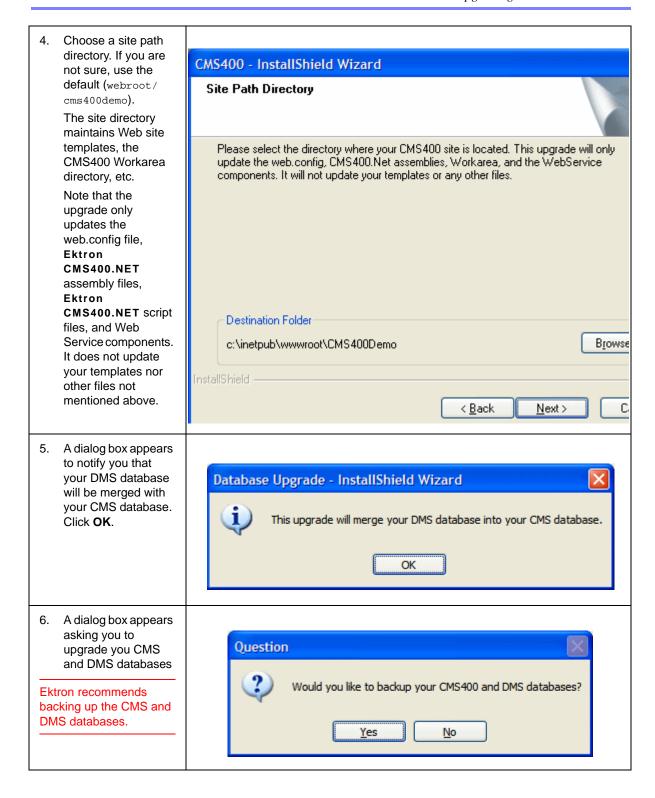
2. The Welcome screen appears. Click **Next**.



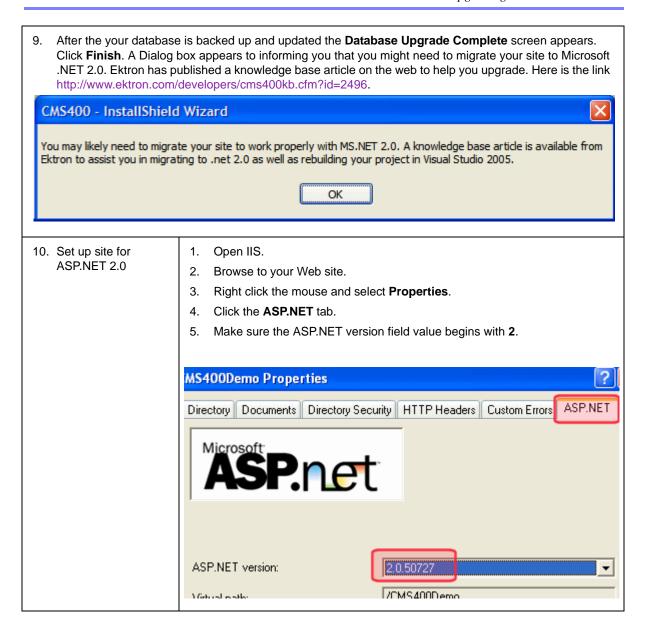
3. Choose an application directory. If you are not sure, use the default (C:\\Program Files\
Ektron\CMS400v6x). This directory stores

This directory stores **Ektron CMS400.NET** components and utilities.





7. The **Database** Backup screen Database Upgrade - InstallShield Wizard appears. Select a folder in which to CMS400 Database Backup Directory backup your Workarea files. Please select where you want the CMS and DMS databases to be backed up to. **Destination Folder** Brows C:\...\CMS400v60\SiteSetup\DatabaseBackup < Back Next> This screen prompts CMS400 - InstallShield Wizard for database SQL Server DB Setup connection information. Enter your database server information. Please enter the required information to connect to your MSSQL or MSDE database. Selecting Next will test the connection. For Trusted Connection type leave User and Password blank. I SQL 2005 users, please enter the machine name in the server area. (local) Server: Username: Password: Cancel < Back Next>



# **Backing Up Databases**

To protect information contained within the database, it is recommended that you back it up before performing a database upgrade. This section describes how to backup and restore Microsoft SQL and MSDE2000 databases. The steps to perform each are in the following sections:

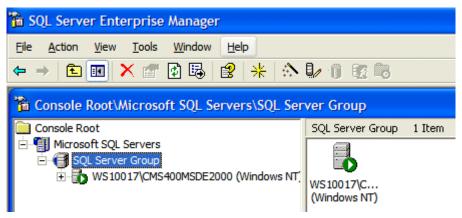
- "Backing Up a Microsoft SQL Database" on page 39
- "Restoring a Microsoft SQL Database" on page 42
- "Backing Up an MSDE2000 Database" on page 46
- "Restore an MSDE2000 Database" on page 46

See Also: "Database Entry Implications When Restoring or Moving a Ektron CMS400.NET Database" on page 47

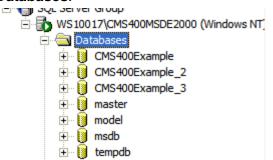
## **Backing Up a Microsoft SQL Database**

The following is an example of the steps for creating a backup of a Microsoft SQL database.

- 1. Open Microsoft SQL Server Enterprise Manager.
- 2. Click on Microsoft SQL Servers > SQL Server Group.

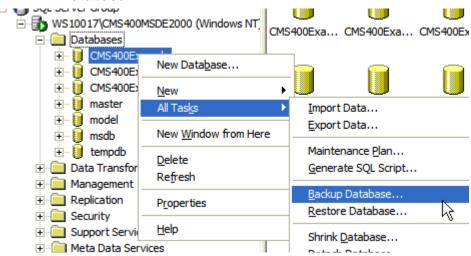


- Click on the server where the database is located.
- 4. Click on **Databases**.

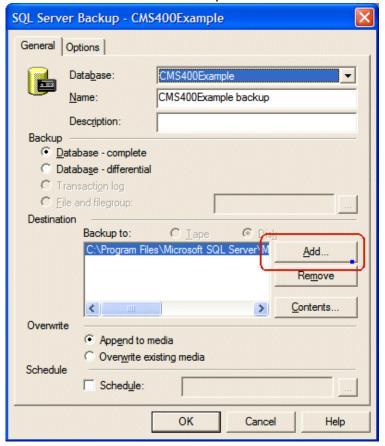


Choose the database to back up.

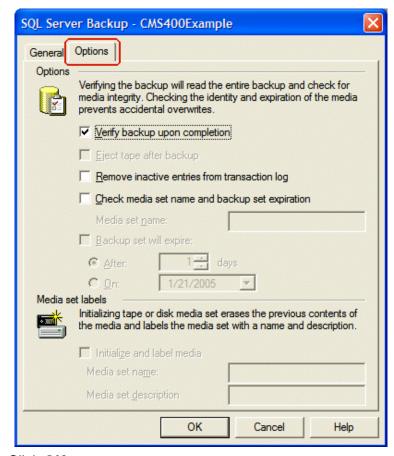
6. Right click on **Database** and click **All Tasks > Backup Database**.



7. Add a location to which to back up the file.

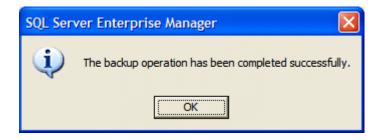


#### 8. Set any options.



#### 9. Click OK.

If the Backup is successful, this window appears.



## **Restoring a Microsoft SQL Database**

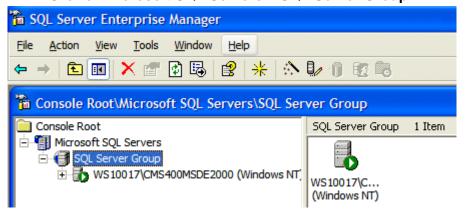
The following is an example of the steps for restoring a backup copy of a Microsoft SQL Database.

See Also: "Database Entry Implications When Restoring or Moving a Ektron CMS400.NET Database" on page 47

#### WARNING!

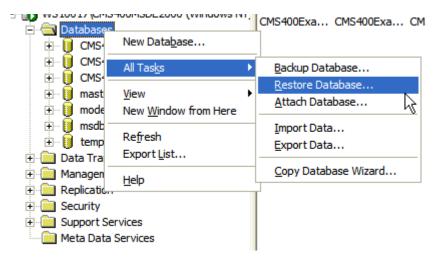
Before restoring an SQL database, either stop the Ektron Windows service or force all connections closed. You need to do this because the Ektron Windows Service accesses the database. To view and update the status of the service, go to Computer Management > Services and Applications > Services. For more information, see the **Ektron CMS400.NET** Administrator Manual section "Ektron Windows Service."

- Open Microsoft SQL Server Enterprise Manager.
- 2. Click on Microsoft SQL Servers > SQL Server Group.

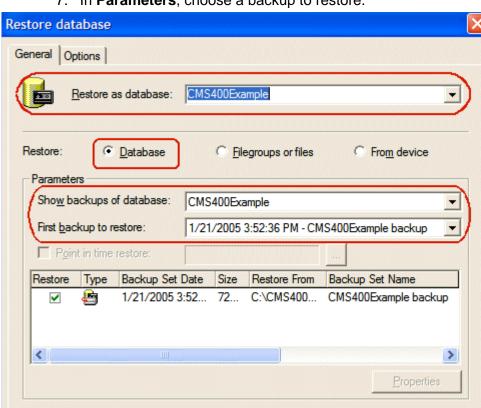


3. Click the server to which you want to restore the database.

4. Right click **Databases > All Tasks > Restore Databases**.



- 5. In the **Restore as database** field, type the name you want the database to be restored as.
- 6. Choose the **Database** radio button.



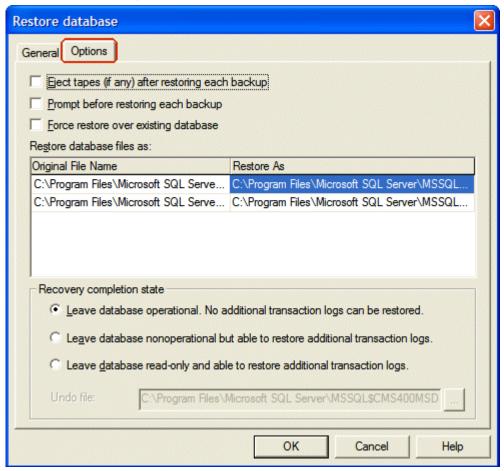
OK

Cancel

Help

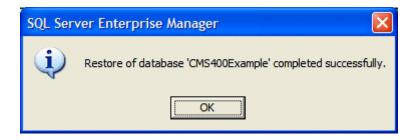
7. In Parameters, choose a backup to restore.

8. Set any options.



#### 9. Click OK.

If the restore is successful, this window appears.



## **Backing Up an MSDE2000 Database**

Below are examples of syntax to backup your database and create a log of your backup. You may need to modify them or add switches based on the configuration of your database. To find a list of switches and their definitions, type **osql** -? at the prompt.

#### NOTE

Switches used by OSQL are case sensitive.

To backup an MSDE2000 database, follow these steps.

1. Open a command window.



Add the following line after the prompt.

osql -d cms400demo -E -n -Q "BACKUP DATABASE cms400demo TO DISK = 'c:\cms400demo.bak'"

- Press < Enter>.
- 4. To make a log of the backup, add the following line after the prompt.

osql -d cms400demo -E -n -Q "BACKUP LOG cms400demo TO DISK = 'c:\cms400demo \_log.bak'"

5. Press <Enter>.

## Restore an MSDE2000 Database

Below is an example of syntax to restore your database. You may need to modify it or add switches based on the configuration of your database. To find a list of switches and their definitions, type **osql** -? at the prompt.

To restore an MSDE2000 database, follow these steps.

#### WARNING!

Before restoring an SQL database, either stop the Ektron Windows service or force all connections closed. You need to do this because the Ektron Windows Service accesses the database. To view and update the status of the service, go to Computer Management > Services and Applications > Services. For more information, see the **Ektron CMS400.NET** Administrator Manual section "Ektron Windows Service."

1. Open a command window.



2. Add the following line after the prompt.

osql -d master -E -n -Q "RESTORE DATABASE cms400demo FROM DISK = 'c:\cms400demo.bak'"

Press < Enter>.

# Database Entry Implications When Restoring or Moving a Ektron CMS400.NET Database

Use Ektron's sitesetup.exe utility to create a new Ektron Web project. This utility lets you create a new Ektron Web site or perform a database upgrade.

## **Database Login Requirements**

During the site setup process, you must log in to your database with system administrator (sa) rights. This login allows **Ektron CMS400.NET** to automatically add several rows to the system/master database.

## Adding Required Database Rows After Site Setup

If you did not log in as sa during installation or manually moved your Web site to another database, you can add the required system/master rows in one of two ways.

- "Using the Site Setup Utility to Add Required Rows After Database Setup" on page 48
- "Manually Adding System/Master Required Rows" on page 52

#### IMPORTANT!

This procedure alters tables. However, no data is lost. You are prompted to back up your database prior to running the upgrade.

## Using the Site Setup Utility to Add Required Rows After Database Setup

1. Start the Site Setup utility by following this path:

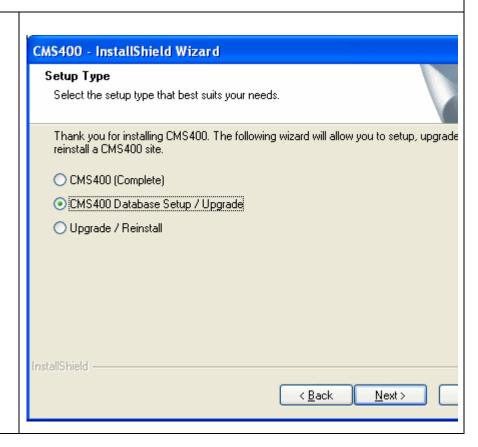
Start Menu > All Programs > Ektron CMS400 > Utilities > CMS400 Site Setup

2. Select CMS400

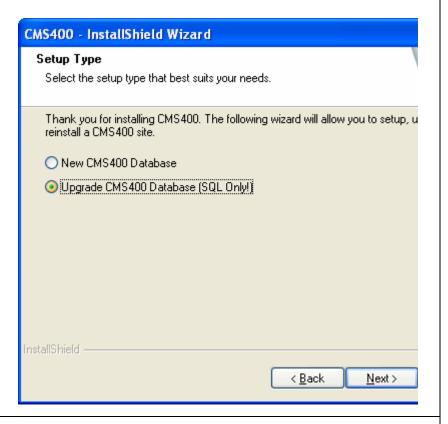
Database Setup /

Upgrade and click

Next.

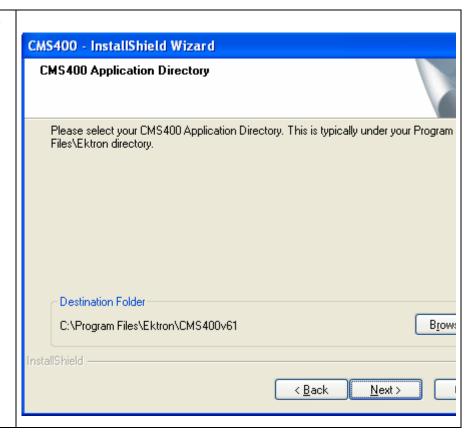


3. Select Upgrade CMS400 Database (SQL Only!) and Next.

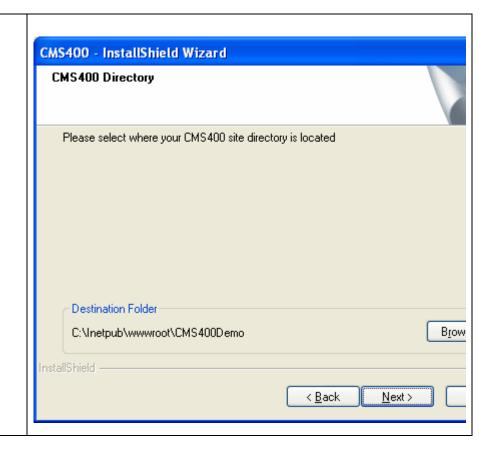


- 4. Click **Next** to back up your current database.
- 5. You are advised to back up your database.

 Browse to the folder where your Ektron application is installed.



7. Select your site directory.



 You are prompted to enter your sa login username and password.



9. Click **Next** to begin database upgrade.

## Manually Adding System/Master Required Rows

You can manually update the system/master database with the rows required by **Ektron CMS400.NET** by executing the SQL script provided below against the system/master database.

```
***/
sp_addmessage 2000000002, 10, N'Error in %s: Insert into %s returned %d rows. %s', US_ENGLISH,
FALSE, REPLACE
go
sp_addmessage 2000000003, 10, N'Error in %s: Failed creating record because primary key already
exists. %s', US_ENGLISH, FALSE, REPLACE
go
***/
sp_addmessage 2000000004, 10, N'Error in %s: Error %d updating into %s. %s', US_ENGLISH, FALSE,
REPLACE
ao
```

# **Updating Application Messages**

#### WARNING!

If upgrading from version 5.0 or later, this section does not need to be completed.

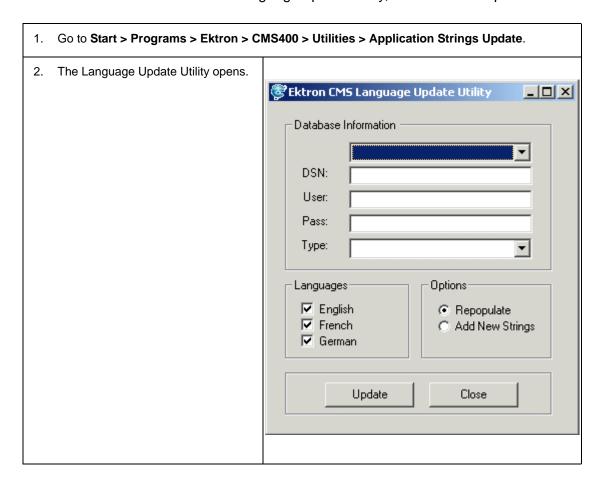
Ektron CMS400.NET provides language support for French and German. If you are upgrading from a previous version and are using your old database, the translated strings are not included. Because of this, the installation includes a utility that lets you populate your old database with the translated strings.

## **Prerequisites**

Before using the language upgrade utility, you must upgrade your version of Ektron CMS400.NET. For information on this, see "Performing the Upgrade" on page 26. During the upgrade, if you opt to keep your previous database, proceed with this section.

## **Using the Language Update Utility**

To use the language update utility, follow these steps.



3. Select the DSN for the database from the drop down list.



4. Enter a username and password with permissions to the DSN if required.

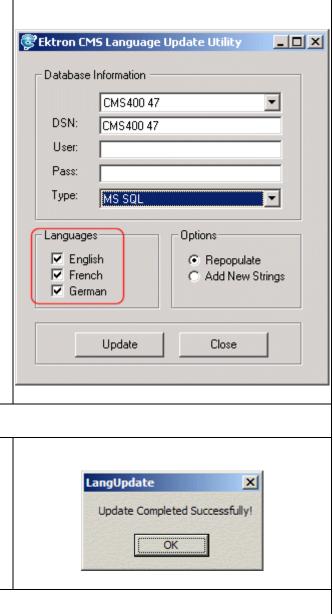
5. Select the type of database you are using. It will be updated with the language strings.



- 6. Select the action you want to perform.
- Repopulate deletes all strings and repopulates the database
- Add New Strings adds only new strings in the current release of Ektron CMS400.NET. (Recommended if you changed existing strings)



7. Select the languages that you would like to be updated/added to the database.



10. Click **OK** to close the window.

Click the **Update** button.

appears.

When the language update is complete, the following screen

11. Click Close on the Languages Update Utility window.

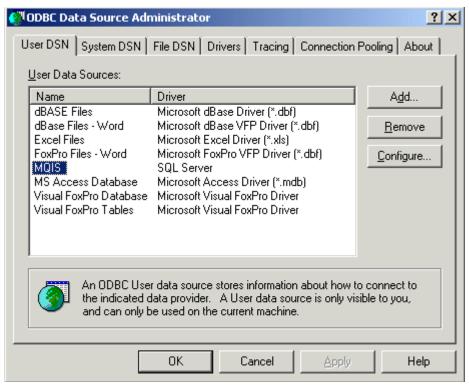
# Creating a New DSN

WARNING!

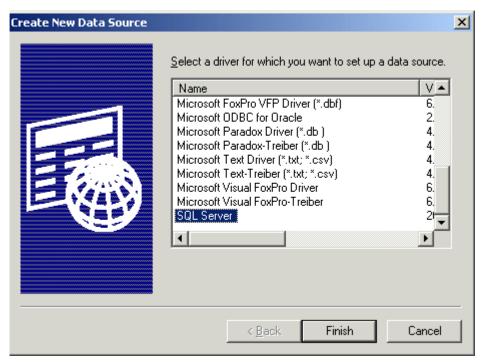
If upgrading from version 5.0 or later, this section does not need to be completed.

If a DSN was not automatically created during installation/upgrade, follow this procedure to access the ODBC Manager and point the DSN to the new database.

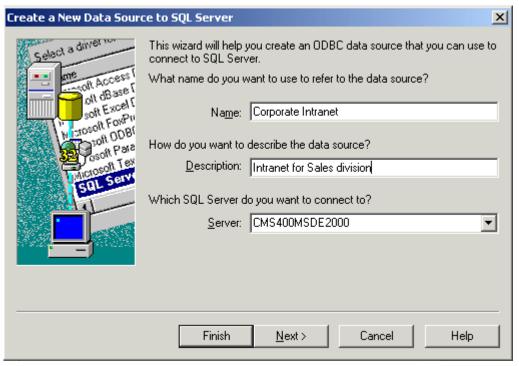
- Access the ODBC Manager from the Control Panel.
- The ODBC Data Source Administrator dialog is displayed.



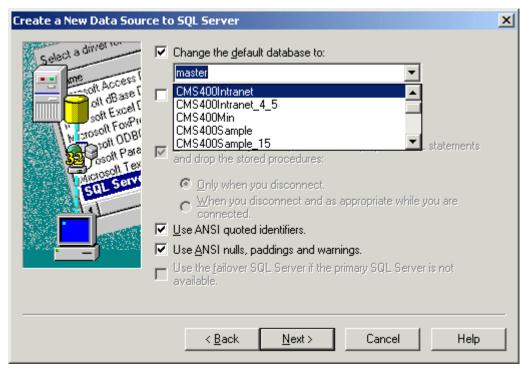
- 3. Click the System DSN tab.
- 4. A list of system data sources appears.
- 5. Click Add.
- 6. The Create New Data Source window appears.



- 7. Select the driver that best suits your version of MS-SQL server.
- 8. Click Finish.
- 9. The Create a New Data Source to SQL Server window opens.
- 10. Specify a name, description, and choose the SQL server to connect to.
- 11. Click Next >.



- 12. The next screen appears. Enter the necessary information about the authentication for the DSN, then click **Next** >.
- 13. The next screen appears.
- 14. Change the default database to the one that you created. Make any other adjustments on this screen if necessary. Then click Next >.



- 15. The next screen appears. Choose whichever options you would like for the DSN, then click **Finish**.
- The ODBC Microsoft SQL Server Setup window displays a summary of your settings.
- 17. Click **Test Data Source** to verify the data source.
- 18. If the DSN is good, you receive a message that the test completed successfully. If not, edit the DSN and make sure that everything is set up properly.
- 19. To finish, click the **OK** button at the bottom of the screen, and close the ODBC Manager.

# Updating a Site Replication Production Machine after Upgrading from 5.2 to 6.0

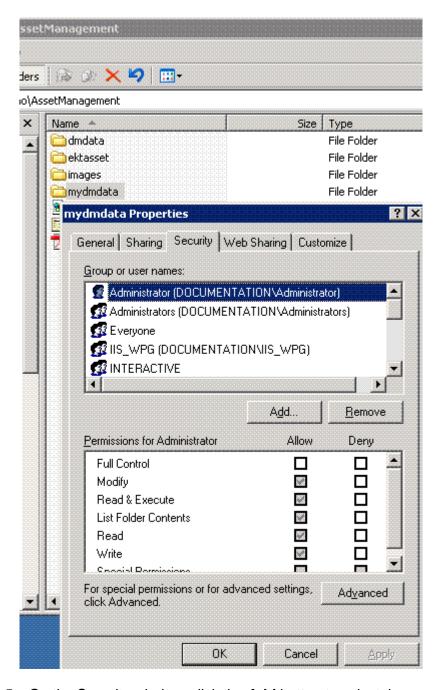
# **Background Information**

As part of Release 6.0, the <code>dmdata</code> and <code>assets</code> directories have been moved. As a result, the <code>dmdata</code> folder is not configured in IIS, and neither directory has the correct permissions. Follow the steps below to resolve these issues after you upgrade to 6.0.

# **Manual Update Steps**

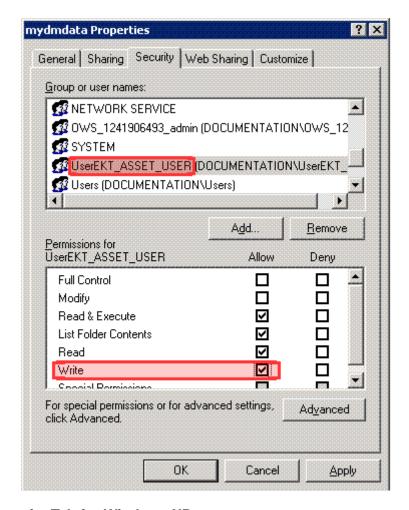
Follow this procedure after you upgrade from **Ektron CMS400.NET** version 5.2 to version 6.0.

- Open Windows Explorer.
- 2. Within your Web site root folder, open the Assetmanagement folder.
- 3. Create a new directory named MyDmdata.
- 4. Right click on the mydmdata folder. Select **Properties** then **Security**.

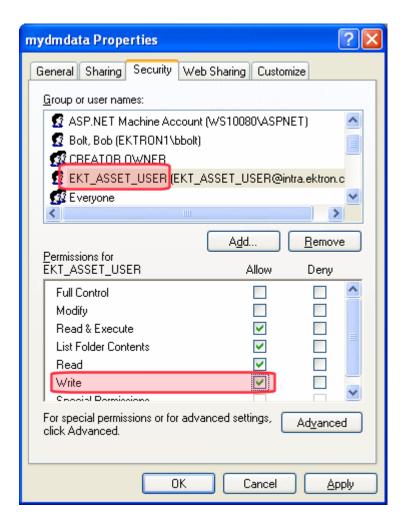


- On the Security window, click the Add button to select the Ekt\_Asset\_User. If you are using WIndows2003 server, select userEKT\_Asset\_User.
- 6. Give that user Write permissions.

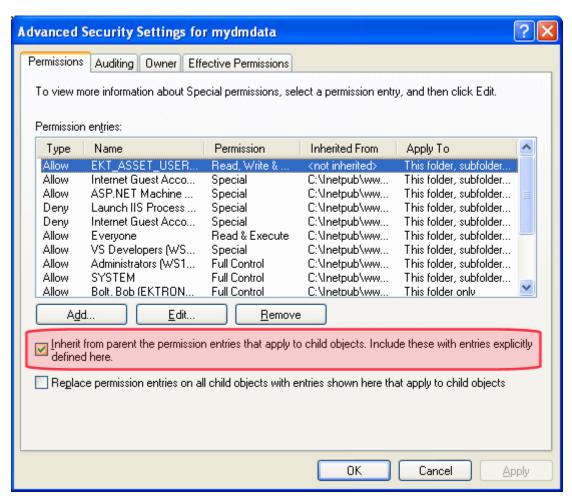
## **Security Tab for Windows Server 2003**



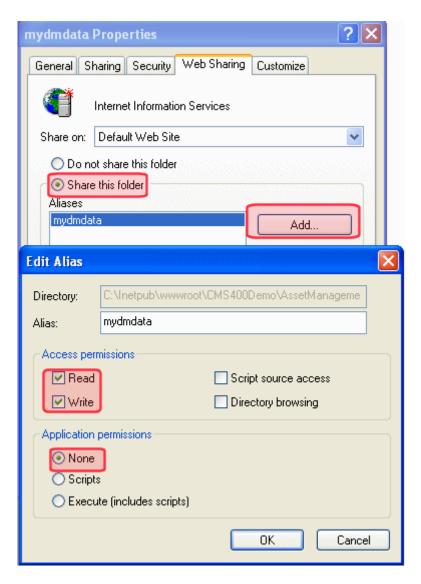
**Security Tab for Windows XP** 



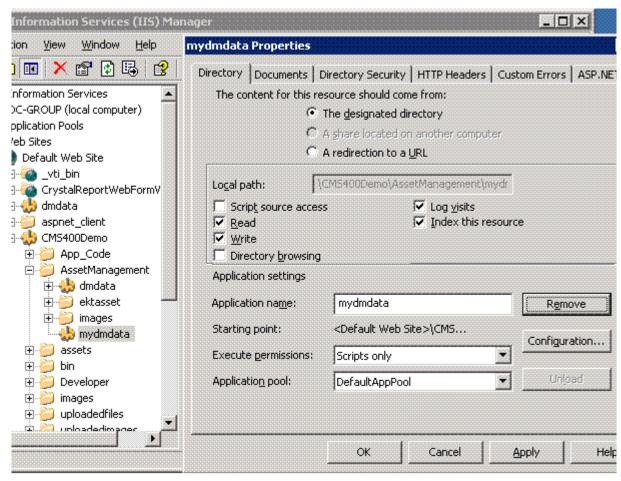
- 7. Click the **Advanced** button.
- 8. On the Advanced Security Settings screen, make sure the directory inherits permissions from other folders.



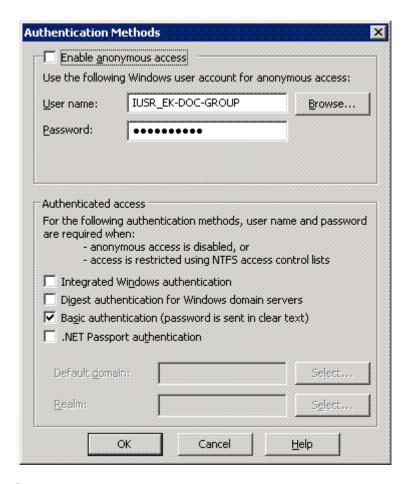
- 9. Click on **Web Sharing** tab.
- 10. Click Share this folder.
- 11. The Edit Alias dialog opens. Check **Read** and **Write** Access Permissions.
- 12. Set Application permissions to None.



- 13. Save and close all open dialogs.
- 14. Open IIS.
- 15. Navigate to the MyDmdata directory.
- 16. Right click the directory and click properties.
- 17. Assign to the folder Read and Write.
- 18. Create the folder as an application.



- 19. Click the Directory Security tab.
- 20. Click to edit authentication and access control.
- 21. Disable Anonymous Access and set to Basic Authentication.



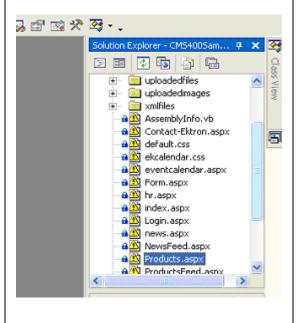
- 22. Save and close all open dialogs.
- 23. Open Windows Explorer.
- 24. Navigate to the your web site/Assets Directory.
- 25. Right click it and click properties.
- 26. Click on the Security tab.
- 27. Give the ASP.Net and lusr full permissions.
- 28. Save and close all open dialogs.
- 29. Access the Ektron CMS400.NET Workarea.
- 30. Go to Settings > Configuration > Asset Server Setup.
- 31. Update the WebShareDir from dmdata to mydmdata.

# **Troubleshooting Upgrade Problems**

#### **Problem**

After upgrade, Ektron CMS400.NET does not load properly. Also, an error icon appears next to your templates when you open the project in Visual Studio.NET, as illustrated below.

The problem is that your .NET references need to be updated.



#### Solution

To verify the problem, open the Ektron CMS400.NET solution file in Visual Studio.NET (webroot\cms400demo\cms400demo.sln) and look at the template files.

If your references are broken (as shown in the sample screen on the left), delete all Ektron references. Then, add new references with the same name from the webroot\cms400demo\bin folder.

When viewing a page containing CMS400.NET Server controls or API calls, the page returns a fatal error **Compiler failed with Error Code 2000**.

Detailed compiler output may say Fatal error BC2000: compiler initialization failed unexpectedly: The filename, directory name, or volume label syntax is incorrect.

This error message might appear after an upgrade.

See Ektron Knowledge Base article "ERRMSG: Compiler failed with Error Code 2000"

(www.ektron.com/developers/
cms400kb.cfm?id=2029)

Problem	Solution	
After upgrading from Ektron CMS400.NET version 4.8 or earlier, Metadata is no longer applied or required when adding or editing content.	In Ektron CMS400.NET version 4.8 or earlier, Metadata is applied globally. In later versions, metadata is applied to each folder individually. Child folders can inherit the metadata from a parent folder or they can have their own metadata settings. To set the metadata settings back to global, follow	
	these steps.	
	1. In the Workarea, click on the site's root folder.	
	2. Next, click View > Folder Properties.	
	3. Click the Edit Properties button ( ).	
	4. Click the <b>Metadata</b> tab.	
	<ol><li>Check the all of the appropriate check boxes for <b>Assigned</b> and <b>Required</b> Metadata.</li></ol>	
	6. Click the <b>Save</b> button ( <b>II</b> ).	
	If you have not broken inheritance on any of the folders, your metadata settings are applied globally.	
	For additional information on Metadata, see the Administrator Manual section "Managing Content" > "Managing HTML Content" > "Metadata" > "Working with Metadata Definitions" > "Assigning Metadata to a Folder"	

# Installing Ektron CMS400.NET

This section explains how to install **Ektron CMS400.NET** through the following topics:

- "Before You Install" on page 73
- "Performing the Installation" on page 74
- "Oracle Databases" on page 107
- "Document Management Client Install" on page 108
- "eWebEditPro+XML Client Install" on page 109
- "Results of Installation" on page 112
- "Changes to the CMS400 web.config File" on page 113
- "After Installation" on page 114
- "Setting Up an Additional Site" on page 114
- "Moving a Site to Another Directory or Server" on page 117
- "Moving a Site to Another Directory or Server" on page 117

# Before You Install

Prior to installing Ektron CMS400.NET, complete these tasks.

- 1. Make sure that Internet Information Server (IIS) is installed in your server.
- 2. Install and configure your Web Application Server. For more information, see <a href="http://www.asp.net">http://www.asp.net</a>.
- 3. If you are setting up one Web site that uses multiple CMS servers and points to a single database server, make sure both servers connect to the same database. This configuration ensures that membership user registrations, forum/blog posts, statistics, etc., are the same on both servers. For more information, see "Moving a Site to Another Directory or Server" on page 117.

# Performing the Installation

#### NOTE

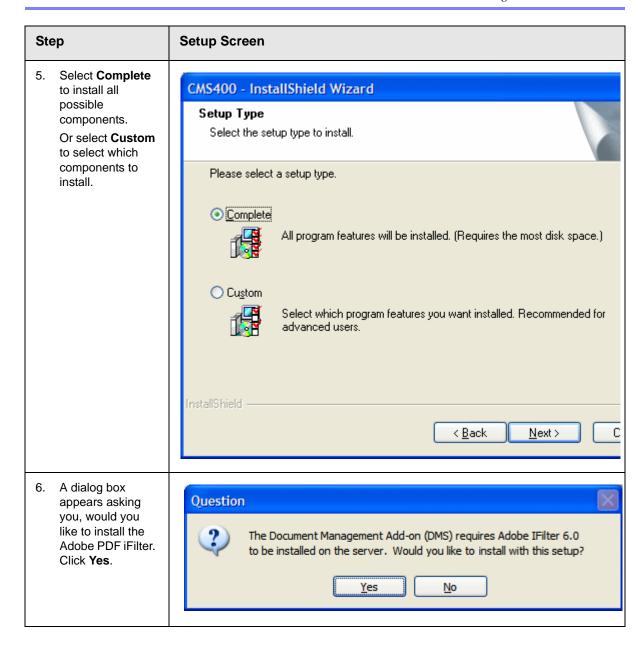
The installation program checks for an installation of MSSQL or Oracle on your server. If nether is installed, it will attempt to install SQL Express.

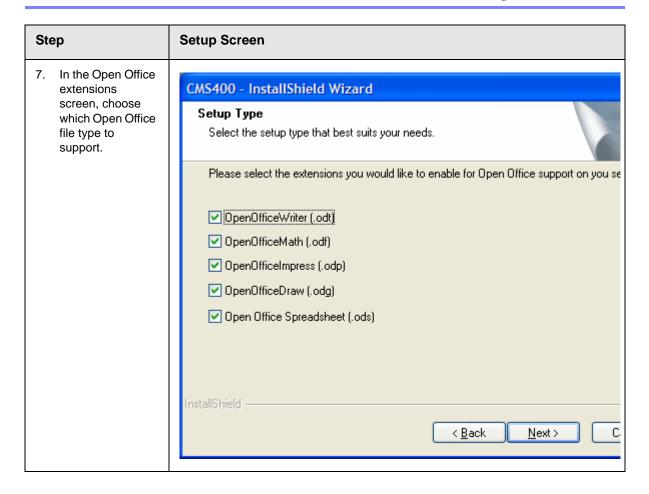
Installing Ektron CMS400.NET involves these actions. The installation program guides you seamlessly through them.

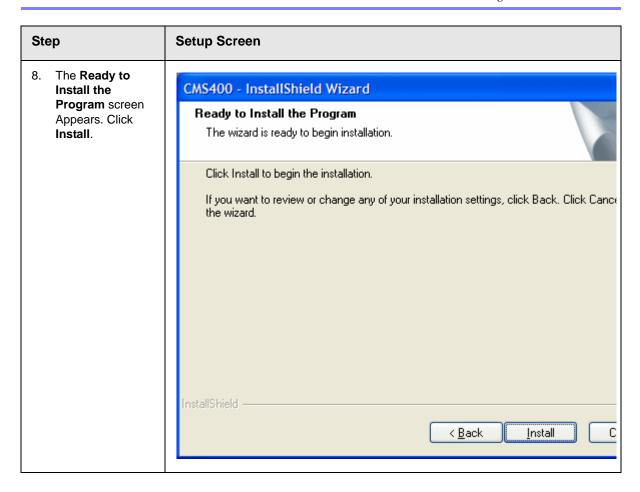
Action	What it does	For details, see
Copy installation files to C:\Program Files	<ul> <li>ensures system requirements</li> <li>installs non-working copy of files needed to set up site</li> </ul>	"An introductory screen appears. Click Next to proceed." on page 75
Set up a site	<ul> <li>moves files based on selected Web folder</li> <li>creates IIS application directories</li> <li>sets upload folder permissions</li> <li>updates web.config (path, version, and build number)</li> </ul>	"Setting up a Site" on page 81
Set up a database	<ul> <li>references database folder for scripts needed to create a database</li> <li>creates new tables and populates them</li> <li>adds and sets user permissions</li> <li>updates the web.config file</li> <li>tests database connection</li> </ul>	"Setting up a Database" on page 91
Set up a user (MS SQL only)	set up SQL user information	"Set Up a User for the CMS400 Database" on page 101

# **Running the Installation and Setup Program**

## Step Setup Screen Go to the Ektron Web site (http://www.ektron.com/download.cfm?product\_id=340&purchase=0) and download Version 6.1 for .NET 2.0 of Ektron CMS400.NET. Double click the downloaded Ektron CMS400.NET executable file. 3. An introductory screen appears. Click **Next** to proceed. 4. A screen displays CMS400 - InstallShield Wizard Ektron's License Agreement. License Agreement Please read the Please read the following license agreement carefully. agreement. Click I Accept... to accept the agree-EKTRON, INC. SOFTWARE LICENSE AGREEMENT ment. \*\* READ THIS BEFORE LOADING SOFTWARE\*\* Click I do not accept. if you do not accept the YOUR RIGHT TO USE THE PRODUCT DELIVERED IS SUBJECT TO THE TERMS. agreement. This AND CONDITIONS SET OUT IN THIS LICENSE AGREEMENT, USING THIS PRODUCT SIGNIFIES YOUR AGREEMENT TO THESE TERMS. IF YOU DO NOT action ends the AGREE TO THIS SOFTWARE LICENSE AGREEMENT, DO NOT DOWNLOAD. setup program. CUSTOMER should carefully read the following terms and conditions before using the software program(s) contained herein (the "Software"). Downloading and/or using the I accept the terms of the license agreement Prin I do not accept the terms of the license agreement < Back Next> Car







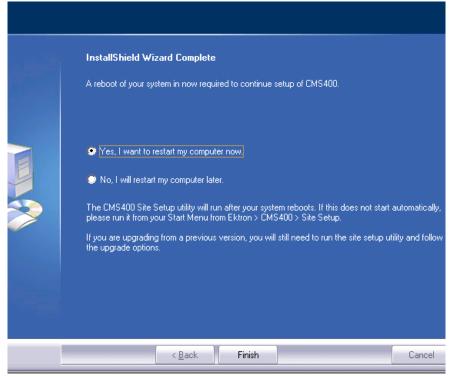
### Step **Setup Screen** The installation CMS400 - InstallShield Wizard program copies the necessary files Setup Status to the C:\Program Files folder. During this process, the CMS400 is configuring your new software installation. installation grants the Everyone user group write permissions to the Installing following system folders: \CMS400Demo\Uploa dedImages \CMS400Demo\Uploa dedFiles \CMS400Demo\Datab ases After completing the installation, you should further configure your permissions based on your network security model before using Ektron CMS400.NET.

# Step 10. The Adobe iFilter Setup screen appears. Click **Next** if you want to install the ability to search through PDF documents. Otherwise, click Cancel. If you proceed. you are asked to agree to Adobe's license agreement and to select a a destination folder. Then, the filter is installed. 11. You might be

**Setup Screen** 



11. You might be prompted to restart you server. If so, Ektron recommends doing a restart now, before continuing the installation.



#### Step

#### **Setup Screen**

If you restart now, the site setup procedure begins immediately upon completion of the restart.

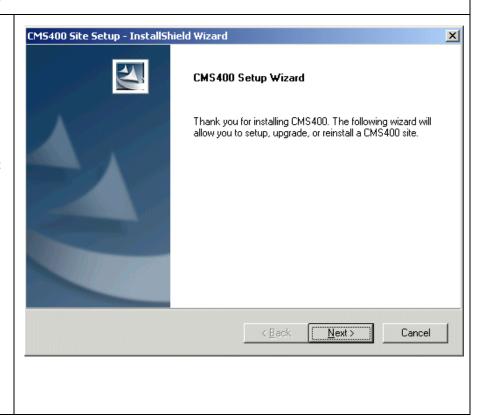
If you restart later, you can launch the site setup from Start > Programs > Ektron > CMS400 > Utilities > CMS400 Site Setup.

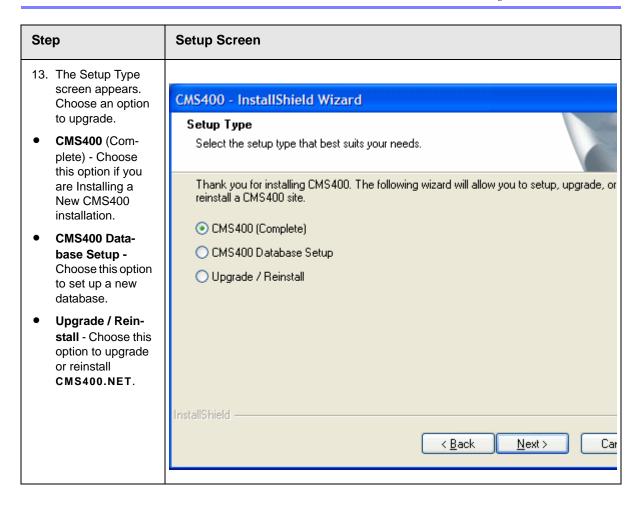
## Setting up a Site

12. This screen appears. It lets you set up a Web site.

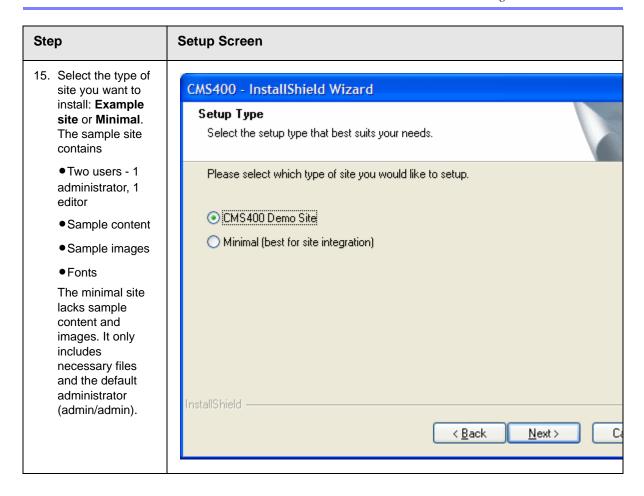
To set up a site, the installation copies the following folders from C:\Program
Files\Ektron\CM
S400v6x to the
Web root folder you specify:

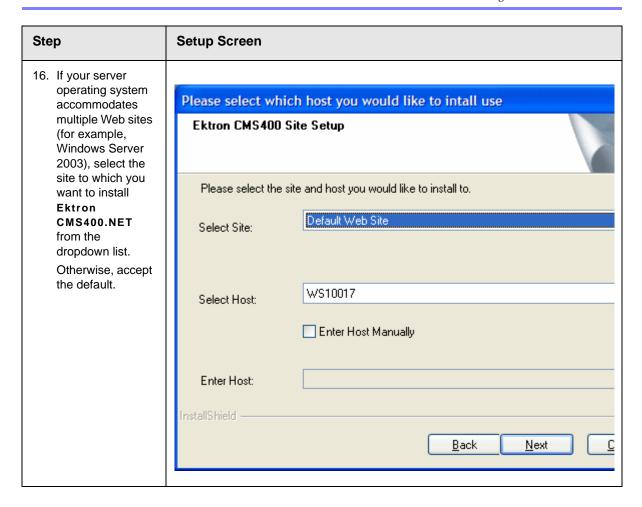
- BIN
- workarea
- documentation
- uploaded files and uploaded images
- a login page
- the VS 2005 solution file

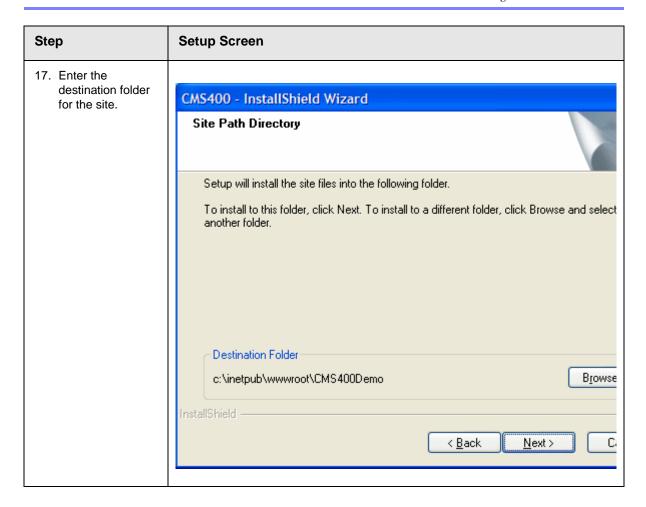




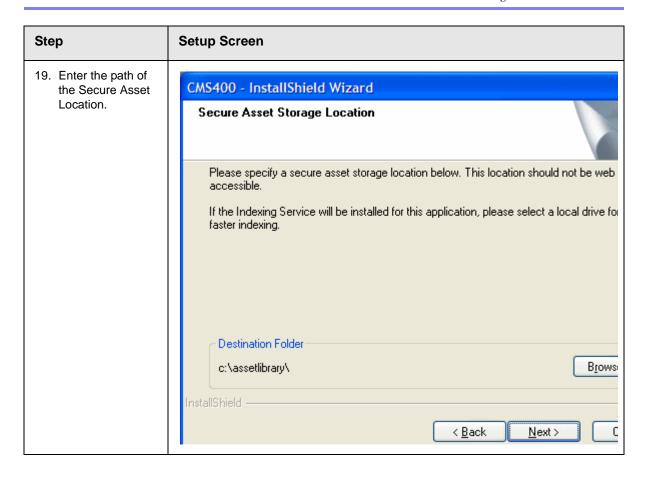
#### Step **Setup Screen** 14. Enter license keys CMS400 - InstallShield Wizard X for the Ektron License Keys CMS400.NET and WebImageFX, if you have them. Please enter your license keys. Key 1 is for CMS400. Key 2 is for WeblmageFX. If you do not License keys are have your license key, it may be added when you begin using the product. typically emailed Key example: yourdomain.com(cms44)(xml)?23490832492332-4 to your organization when Key 1: you request a copy of the application. Key 2: When cutting and pasting license keys, keep the full license key intact without adding or deleting characters. If you do not have < Back Next> Cancel the license keys now, you can insert them later. See "Configuring Ektron CMS400.NET" in the Administrator manual for details.

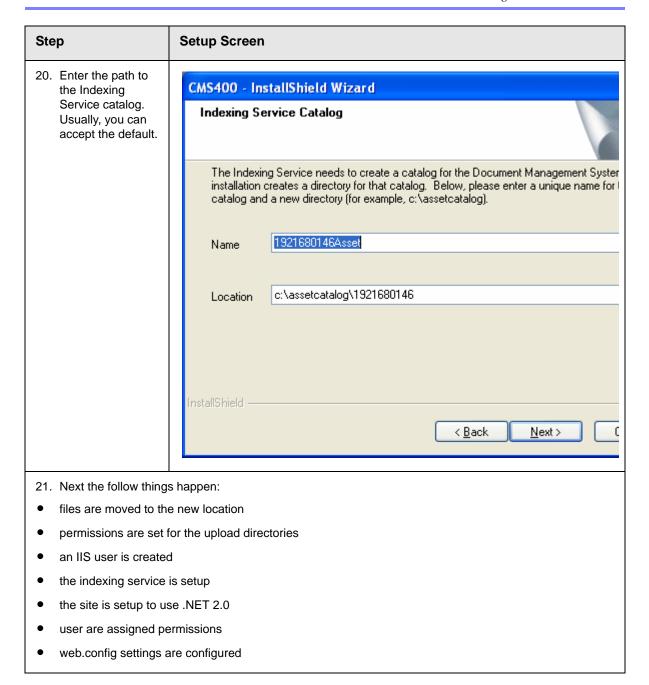


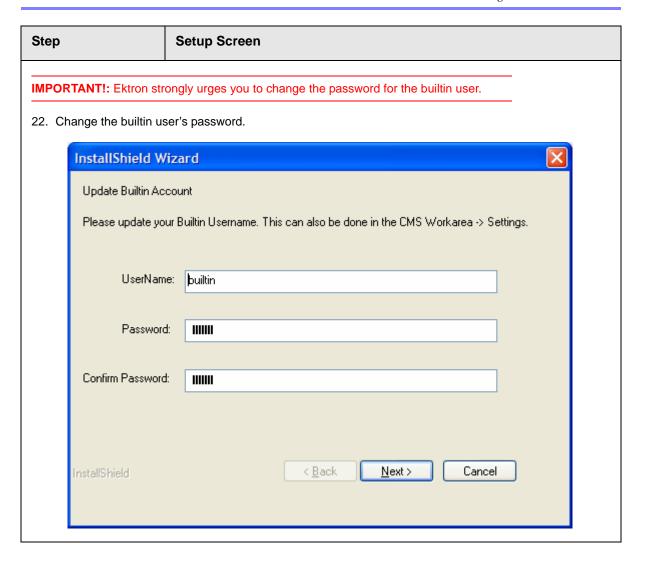




#### Step **Setup Screen** 18. On the Host CMS400 Site Setup - InstallShield Wizard screen, specify the host name Host (which defines the URL) that will be used to access your Web site. What is the server host name (including subfolder) you will be using to access this site? The host name If you are unsure, please use the default. also configures variables during the installation. http://localhost/CMS400Demo It can be any of the following: An IP address (123.456.7.890) A server name (WebServer1234) A domain name (www.ektron.com) InstallShield < Back Next >Can







Step

**Setup Screen** 

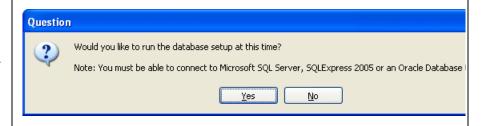
## Setting up a Database

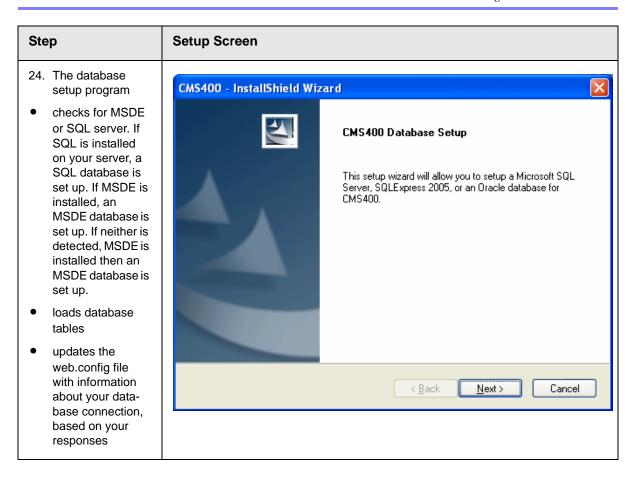
**Important:** For information on setting up an Oracle database for Ektron CMS400.NET, see "Oracle Databases" on page 107.

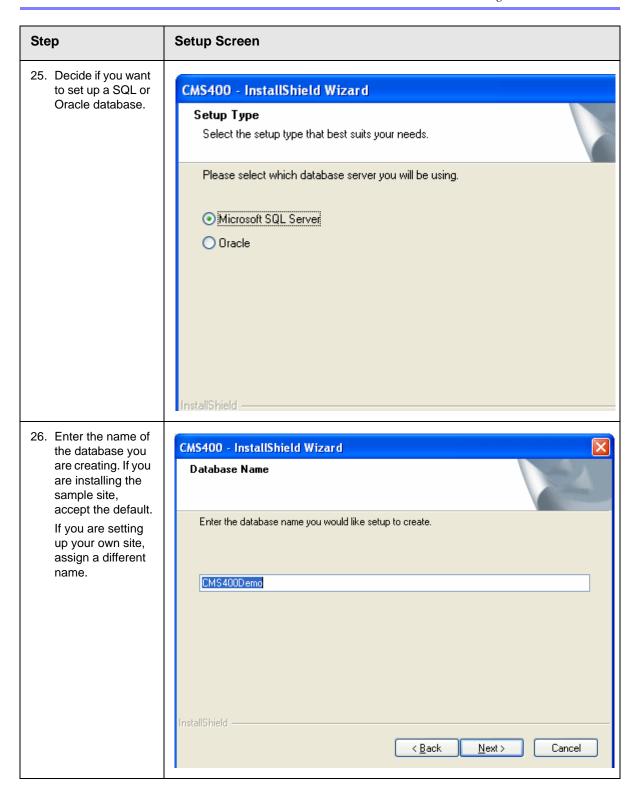
Your database contains information such as users and content blocks. **Ektron CMS400.NET** is compatible with the following databases:

- Microsoft SQL Server 2005 (including Express version)
- Microsoft SQL Server 2000
- Microsoft SQL Server Desktop Engine (MSDE) 2000
- Oracle 10G
- Oracle 9i
- 23. You are asked if you want to set up a database.

Click Yes to do so.







Cancel

#### Step **Setup Screen** 27. This screen CMS400 - InstallShield Wizard prompts for database SQL Server DB Setup connection information. Server -(local)\CMS400M Please enter the required information to connect to your MSSQL or MSDE database. Selecting SDE2000 is the Next will test the connection. For Trusted Connection type leave User and Password blank. For default value for SQL 2005 users, please enter the machine name in the server area. the MSDE server installed with Server: (local) Ektron CMS400.NET. To install this, accept Username: the default. Otherwise, enter a Password: SQL or MSDE server that already exists. For SQL, this would typically be (local).

**Username** - Enter the username you will use to access the database. If you are installing the MSDE database delivered with **Ektron CMS400.NET**, the username is **sa**.

< Back

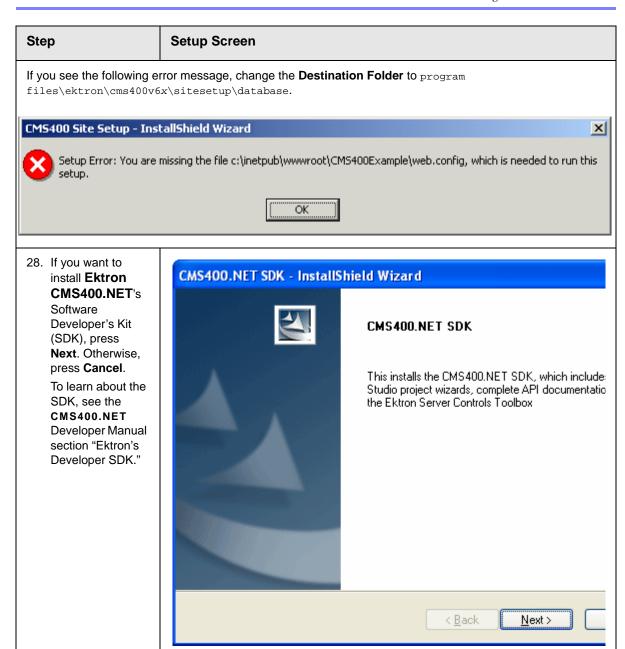
Next>

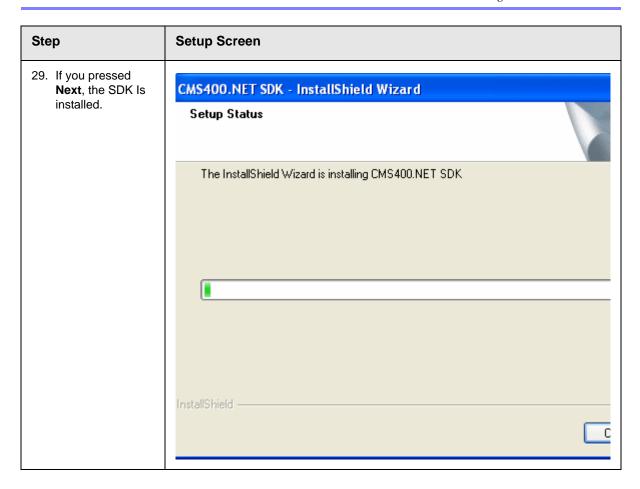
**Password** - Enter the password you will use to access the database. If you are installing the MSDE database delivered with **Ektron CMS400.NET**, the password is **ektron**.

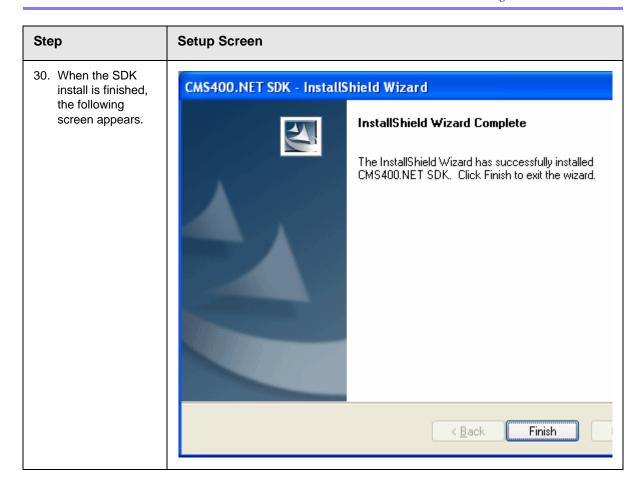
Note: If you want to use NT authentication, leave the username and password blank. This will set up a trusted connection.

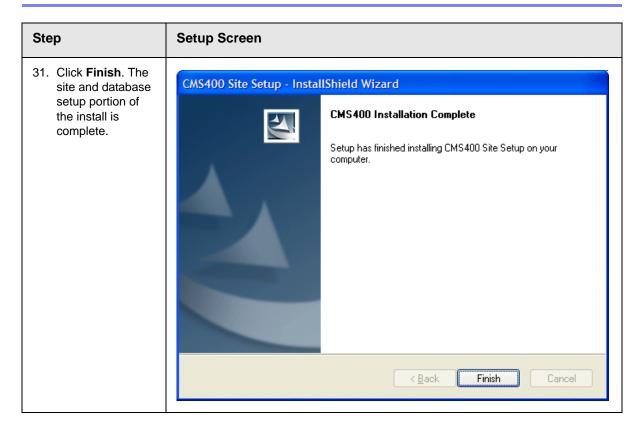
After you complete the screen, the installation program creates a database using the provided information. Then, it tests the database connection to verify that the information is valid and that you can save content.

If the database name was used previously, you are informed and asked to assign a different name.









# Using Microsoft Windows Server 2003 as a Client (Web Folders Setup)

Symptom	Resolution
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.	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.  You can only install WebFolders from Office 2003 if you have an Office 2003 license for each Windows2003 server on which you plan to install WebFolders.

### Web Folders Setup for Microsoft Windows Server 2003

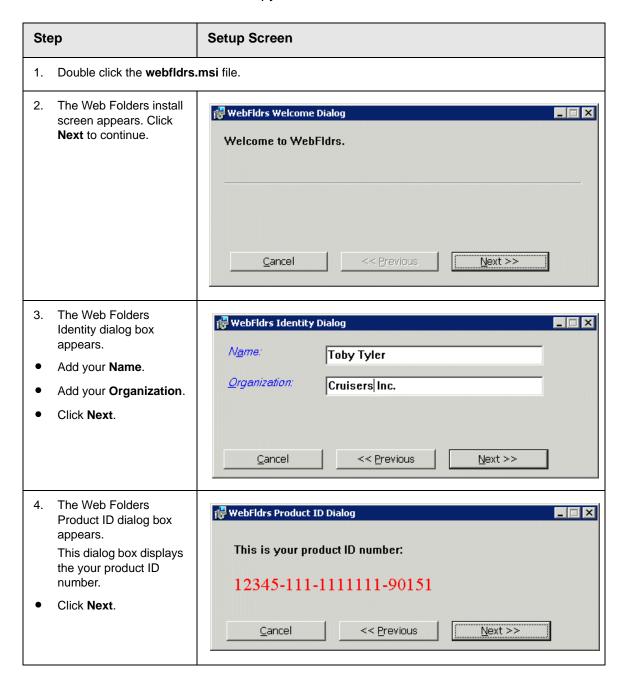
#### NOTE

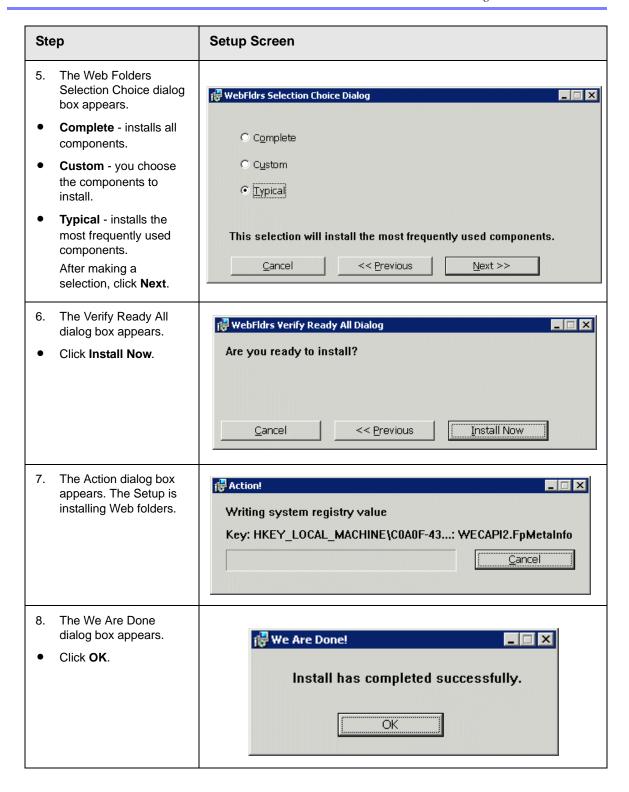
You only need to run the Web Folders Setup if there is a problem during the install. The **Ektron CMS400.NET** install performs the setup when needed.

The MSDAIPP.DLL is no longer shipped with Microsoft Windows Server 2003, making communication with Web folders impossible.

To correct this, **Ektron CMS400.NET** setup runs the Web folder setup when it detects Microsoft Windows Server 2003.

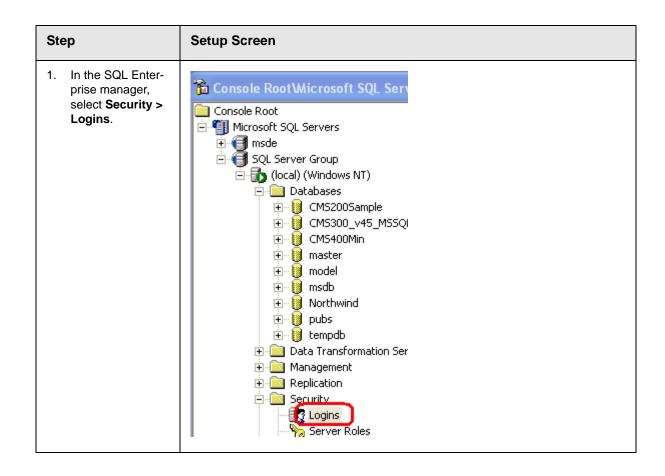
The following steps explains installing Web Folders. You will need to obtain a copy of the webfldrs.msi file.

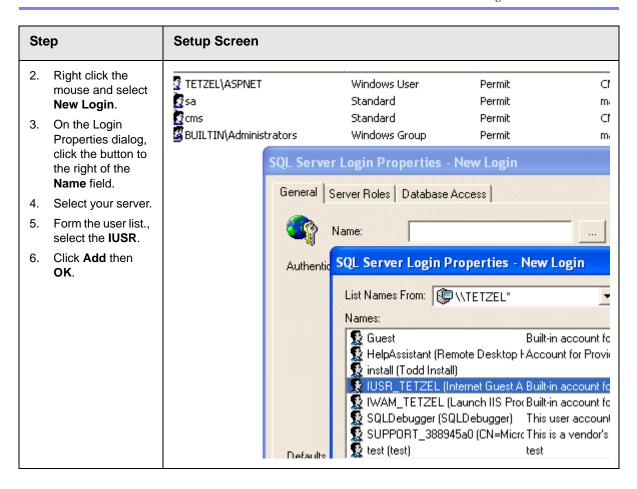


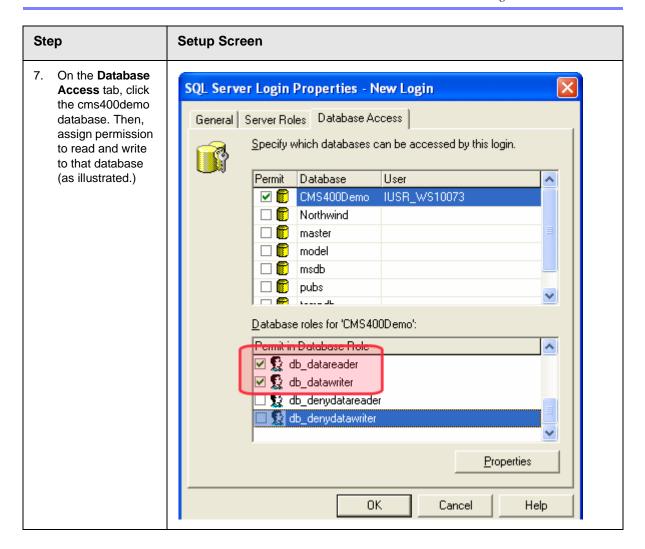


# Set Up a User for the CMS400 Database

The installation automatically sets up user information based on data collected during setup. However, if there is a problem creating the user, this section describes how to set up a user manually.







#### Step

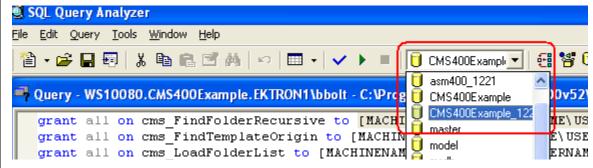
#### **Setup Screen**

Run the Grant Permission Script.

Note: Before doing this, review your users and their permissions. Adjust as necessary for your configuration. Also, if you use Windows Authentication and all users are domain users (and the database administrator wants it this way), you may not have to perform this step.

Follow these steps to do that.

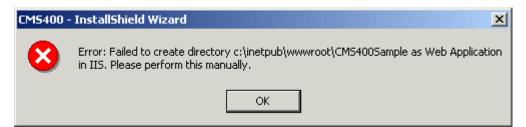
- Open the SQL Query Analyzer.
- From the dropdown list, select the CMS400.NET database.



- Click File > Open.
- Open C:\Program Files\Ektron\CMS400vnn\SiteSetup\Database\grantpermissionsscript.sql. (nn represents the release number)
- Within that file, replace [MACHINENAME or DOMAINNAME\USERNAME] with your domain name, backslash (\), and ASPNET (the ASP.NET machine account). For example, [ws10080\ASPNET].
- Press the Execute Query button ( ).
- Replace the text between square brackets with with your domain name, backslash (\), and the IIS Internet Guest Account. For example, [ws10080\IUSR\_ws10080]. Press the Execute Query button.
- If using SQL server authentication, replace the text between square brackets with your domain name, backslash (\), and the SQL server authentication name. Press the Execute Query button.
- If using SQL server authentication, replace the text between square brackets with the SQL server authentication name only. Do not include the domain name. Press the Execute Query button.

# **Possible Error Messages During Installation**

### **Error**



### Possible Causes and Solutions

Possible cause	Suggested solution
User does not have permission to create objects	Grant user permission to create objects. For information on how to, read IIS Security help topic "Setting NTFS Permissions for a Directory or File."  http://localhost/iishelp/iis/htm/core/iidfpsc.htm
IIS is not running	Restart IIS. For information on how to, read IIS help topic "Starting and Stopping Sites." http://localhost/iishelp/iis/htm/core/iiststp.htm
Host is not localhost	Install Ektron CMS400.NET on localhost machine only.

### **Error**

# Server Error in '/CMS400Example' Application.

### Parser Error

**Description:** An error occurred during the parsing of a resource required to service this request. Please review the following the parsing of a resource required to service this request.

Parser Error Message: The format of the file 'Ektron.Cms.Controls' is invalid.

#### Source Error:

```
Line 1: <%@ Register TagPrefix="cms" Namespace="Ektron.Cms.Controls" Assembly="Ektron
Line 2: <pre><%@ Page Language="vb" AutoEventWireup="false" Inherits="index21" CodeFile='
Line 3: <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
```

Source File: c:\inetpub\www.vroot\cms400example\intranetbasic\index.aspx Line: 1

Assembly Load Trace: The following information can be helpful to determine why the assembly 'Ektron.Cms.Controls

```
=== Pre-bind state information ===
LOG: DisplayName = Ektron.Cms.Controls
  (Partial)
LOG: Appbase = file:///c:/inetpub/wwwroot/CMS400Example
LOG: Initial PrivatePath = bin
Calling assembly : (Unknown).
===

LOG: Policy not being applied to reference at this time (private, custom, partial, or
LOG: Post-policy reference: Ektron.Cms.Controls
LOG: Attempting download of new URL file:///c:/winnt/microsoft.net/framework/v1.1.43;
LOG: Attempting download of new URL file:///c:/winnt/microsoft.net/framework/v1.1.43;
LOG: Attempting download of new URL file:///c:/inetpub/wwwroot/CMS400Example/bin/Ektronesians.
```

Version Information: Microsoft .NET Framework Version:1.1.4322.2032; ASP.NET Version:1.1.4322.2032

### Cause and Solution

Cause	Solution
You installed <b>Ektron CMS400.NET</b> for .NET 2.0 but have the 1.1 .NET framework.	Install the .NET 2.0 framework.  Or, install the version of <b>Ektron CMS400.NET</b> for the 1.1 .NET framework.

# **Oracle Databases**

This section provides information on setting up an Oracle database for Ektron CMS400.NET.

The Ektron CMS400.NET setup.exe installs an SQL database by default. if you are using an Oracle database, you can select **No** to installing the SQL database when prompted. Or, you can let the install add the SQL database for comparison testing.

After the Ektron CMS400.NET Setup has finished, make sure Oracle is installed and working.

# **Setting Up an Oracle Database**

#### NOTE

The folder path running from the same folder path in the batch file may not work. If this is the case, move all scripts to a directory such as c:\database. Then, run everything from there including the batch file.

- 1. Navigate to:
  - C:\Program Files\Ektron\CMS400v6x\Utilities\SiteSetup\Database\Oracle.
- 2. Create a new Oracle database or use an existing non-CMS database.
- 3. Run cms400\_oracle\_user.sql against your database.
- 4. Open the batch file OracleInstaller.bat and set the following settings:
  - folder="C:\Program
    Files\Ektron\CMS400v6x\Utilities\SiteSetup\Database\Oracle"
  - set instance=orcl
  - set username=system

- set password=welcome
- Save and close the file.
- 6. Run OracleInstaller.bat.
- 7. Edit the web.config for your site. Comment out the SQL connection string. Then, enable and set the one for Oracle as shown below:

```
<connectionStrings>
<!--FOR SQLSERVER-->
<!--add name="Ektron.DbConnection"
providerName="System.Data.SqlClient"
connectionString="server=(local);database=CMS400Demo;Integrated
Security=true;user=sa;pwd=;" /-->
<!--FOR ORACLE-->
<add name="Ektron.DbConnection"
providerName="System.Data.OracleClient" connectionString="Data
Source=orcl;User Id=system;Password=welcome;"/ >
</connectionStrings>
```

8. Save and close the file.

Your Oracle database is set up.

# **Document Management Client Install**

When any client-side user tries to create or edit content, **Ektron CMS400.NET** checks to see if the Document Management feature is installed on his PC. If not, a window appears asking the user if he wants to install it.

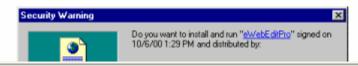
# Ektron DMS400 Automatic Download and Installation

The page you are trying to view contains Ektron DMS400. It will appear within your browser. It allows you to manage asset on web pages as easily as using that application.

Before you can use Ektron DMS400, it must be downloaded into your browser. When you click the **Install Now** button at the bottom of this page, Ektron DMS400 will be automatically downloaded and installed. This process may take several minutes depending on the speed of your network connection. Once downloaded, Ektron DMS400 will not need to download again unless upgrading to a newer version.

You must have authorization to install programs on your computer.

Pictures similar to the one shown below may appear. If they do appear, please click Yes to proceed.



Next, the installation occurs. When the installation completes, the user is instructed to close the window.

# eWebEditPro+XML Client Install

There are two options for deploying **Ektron CMS400.NET**'s editor, eWebEditPro+XML. to client machines.

 Silently deploy the ewebeditproclient.msi file, which is installed to C:\Program

Files\Ektron\CMS400v6x\workarea\ewebeditpro\clientinstall. To do this, use this command-line:

msiexec /i "c:\Program

The command line parameters are explained on this Web page: http://helpnet.installshield.com/robo/projects/HelpLibDevStudio9/IHelpCmdLineMSI.htm.

■ Each time a user connects to Ektron CMS400.NET, his PC is checked for eWebEditPro+XML. If an older version or no version exists, the user is prompted to download ewebeditproclient.exe from the server's c:\Program
Files\Ektron\CMS400v6x\workarea\ewebeditpro\clientinstall folder.

# eWebEditPro with WebImageFX Automatic Download and Installation

The page you are trying to view contains Ektron's eWebEditPro with WebImageFX editor. It will appear within your browser. It allows you to enter content for web pages as easily as using a word processor.

Before you can use eWebEditPro with WebImageFX, it must be downloaded into your browser. When you click the **Install Now** button at the bottom of this page, eWebEditPro with WebImageFX will be automatically downloaded and installed. This process may take several minutes depending on the speed of your network connection. Once downloaded, eWebEditPro with WebImageFX will not need to download again unless upgrading to a newer version.

You must have authorization to install programs on your computer.

By default, Internet Explorer prevents ActiveX control installation on your computer. To install eWebEditPro, click on the control or the Information Bar and select Install ActiveX Control.



The user clicks Install Now to install eWebEditPro+XML.

To use this procedure, the user must be authorized to install programs on his computer.

# Results of Installation

### **File Locations**

By default, the installation inserts files into two locations on the server:

- c:\Program Files\Ektron\CMS400vxx: sample and minimal databases, documentation, utilities, site setup files (for creating additional sites)
- c:\Inetpub\wwwroot\cms400demo: bin folder, Web Services, scripts, supporting files, uploaded files and images, graphics used in the application, CustomAPI (used to customize Ektron CMS400.NET), etc.

#### NOTE

The bin folder stores Ektron CMS400.NET's binary executable files. The .NET environment automatically searches this folder when looking for dll files.

### File Permissions

During installation, the everyone group is given permission to create folders in the following directories:

- C:\Inetpub\wwwroot\cms400demo\uploadedfiles
- C:\Inetpub\wwwroot\cms400demo\uploadedimages

Ektron recommends setting up .NET user accounts to authorize users to add, edit, and delete folders in the installation folder, C:\Inetpub\wwwroot\cms400demo\.

# **IIS Indexing Service**

The installation automatically starts the IIS Indexing service. **Ektron CMS400.NET**'s search use this service.

If you want the IIS Indexing service to work manually, you need to change the settings. These steps explain how to disable IIS's Indexing of the site.

- Navigate to Administrator Tools > Internet Information Services.
- 2. In the IIS window, find the Web site.

- 3. Right click the site and choose properties.
- 4. On the Directories tab, uncheck the **Index this resource** box.
- 5. Click OK.

# Changes to the CMS400 web.config File

See Also: "Managing the web.config File" on page 126

After you install **Ektron CMS400.NET**, the web.config file is updated as follows.

web.config setting	Assigned this value by installation
ek_sitePath	webroot/cms400demo
ek_buildNumber	current build number of Ektron CMS400.NET
ek_version	current version of Ektron CMS400.NET

After you run the database setup utility, the web.config file is updated as follows.

Line	Description	Value (if default accepted)
ek_dbCatalog	the database name you assigned	
ek_dbServer	the database server name (MSSQL or MSDE)	(local)\CMS400MSDE2000
ek_dbConnectionType	database connection type (MSDE or SQL)	sql
ek_dbUsername	user from CMS400 database (only used for SQL)	sa
ek_dbPassword	password from CMS400 database (only used for SQL	Ektron

Line	Description	Value (if default accepted)
ek_dbTrustedConnection	false - (default) sets authentication to SQL Server. Username and password are required. true - sets authentication to Windows. Windows handles security when connecting to database.	false
ek_sitePath	path from the root of web server	

# After Installation

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 "Configuring SSL" on page 158 for more information.

# Setting Up an Additional Site

After installing **Ektron CMS400.NET**, it is easy to create another site. While creating the new site, you can create a sample or minimal site and database. To create a site for your content, you would typically install a minimal site and database, then create your Web page templates. Later, you can add users and content.

To set up an additional site, follow these steps.

- "Step 1: Set up New Site" on page 115
- "Step 2: Set up New Database" on page 115
- "Step 3: Create Project in Visual Studio.NET" on page 116

### Step 1: Set up New Site

- 1. Create a new folder in the Web root folder to contain the site files.
- From the Windows Start menu, follow this path:
   Start > Programs > Ektron > CMS400 > Utilities > SiteSetup
- Follow the steps for creating a new site, as described in "Setting up a Site" on page 81. When prompted to select a folder to which you want to install the files, choose the folder you created in Step 1.

# Step 2: Set up New Database

After installing an **Ektron CMS400.NET** site, it is easy to create a new, starter database. You can create either a sample or minimal database. When creating a database for your content, you typically install a minimal database.

To set up a database, follow these steps.

- From the Windows Start menu, follow this path:
   Start > Programs > Ektron > CMS400 > Utilities > SiteSetup
- 2. On the Setup Type screen, choose **Database Setup only**.



 Follow the steps for creating a new database, as described in "Setting up a Database" on page 91. Be sure to assign the database a name other than the default. Also, when asked to enter a SQL or MSDE server, enter the server name or IP address.

WARNING!

Do not use the instance name (CMS400MSDE2000) -- it will cause an error.

# Step 3: Create Project in Visual Studio.NET

To work with the new site in Visual Studio.NET, you must create a new project for it. To do that, follow these steps.

- 1. Navigate to the folder that contains the new site.
- 2. Double click **Ektron CMS400.NET**'s solution file. If you are using the minimal database, the file is CMS400Min.sln. If you are using the sample database, the file is cms400demo.sln.

At this point, you can build the project and log in. If you cannot log in because you have not set up the license key, use the builtin account: the username is builtin and password is builtin.

### WARNING!

You should only use the builtin account temporarily. As soon as possible, you should insert the license key and log in under a user name assigned in Ektron CMS400.NET.

To learn about creating templates and using server controls, see the **Ektron CMS400.NET** Developer's Manual section "Ektron CMS400.NET Server Controls."

# Moving a Site to Another Directory or Server

Use this procedure to move an **Ektron CMS400.NET** Web site to a new folder or even a different server. For example, you complete work on a site that resides on a development server and want to move it to a production server.

Within this documentation, the original site's folder is referred to as the *source* directory, and the new site's folder is called the *destination* directory. The directories can reside on the same server or different ones.

Moving the site consists of the following major steps. Each step is described below.

- "Step1: Set up an IIS Site on the Destination Server" on page 118
- "Step 2: Copy Files to Destination Directory" on page 119
- "Step 3: Set Security on New Folders" on page 119
- "Step 4: Make the New Directory an IIS Application" on page 120
- "Step 5: Back up the Database" on page 121
- "Step 6: Create a New Database" on page 122
- "Step 7: Restore the Database" on page 123
- "Step 8: Set Security on the Copied Database" on page 125
- "Step 9: Update web.config on the Destination Site" on page 125

# Moving a Site vs. Using the Site Replication Feature

In addition to the Site Move procedure described below, **Ektron CMS400.NET** offers a Site Replication feature. That feature automatically pushes new and updated site files to a 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. For more information, see the **Ektron CMS400.NET** Administrator manual section "Site Replication."

### When You Would Use the Site Replication feature

You'd use the Replication feature in these cases.

- Moving a site from staging to production
- Distributing a site among load-balanced servers

### When You Would Use the Move Site Procedure

You'd use the Move Site procedure in these cases.

- Moving a site from staging to production if you do not have the Replication feature
- Distributing a site among load-balanced servers if you do not have the Replication feature
- 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 could use Site Replication if you have it.
- 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.

# Step1: Set up an IIS Site on the Destination Server

**Note** This procedure assumes your Web server runs Windows 2003 server.

- On the destination server, go to Start > Control Panel >
   Performance and Maintenance > Administrative Tools >
   Internet Information Services.
- 2. Click the plus sign (+) next to the computer's name so that you can see the Web Sites folder.
- 3. Right click the Web Sites folder and select **New Web Site**.
- 4. The Web Site Creation wizard walks you through the steps of creating a new Web site.
- 5. At the TCP Port field, make sure the IP address/host header/ port combination does not conflict with an existing Web site. For example, if the destination server already publishes a Web site on IP address 172.23.23.231 with host header dev.example.com on port 80, your new site could use the same settings on port 81. The new site is accessible through http://dev.example.com:81/.
- 6. When prompted for the path to the new site, create a new folder for the site in the destination server's file system.
- 7. When prompted to assign permissions to the new folder, assign **read**, **write** and **run scripts** permissions.

# **Step 2: Copy Files to Destination Directory**

1. In the Web root of the destination directory, create a folder with the same name as the folder in the source directory.

#### NOTE

You do this in order to set the destination site on the same URL path as the source site on the source server. For example, if you the source site's login page is http://localhost/MySite/login.aspx and you're moving it to dev.example.com port 81, place the destination site at http://dev.example.com:81/MySite/login.aspx.

It is important for both sites to use the same URL path because **Ektron CMS400.NET** uses *root relative* pathing in links to pages and images. This means that any managed content item can be displayed on any page in the Web site. Since the path may be embedded in hyperlinks and image paths, changing the URL path on the destination server may cause problems.

2. Copy all files in the source directory to the destination directory.

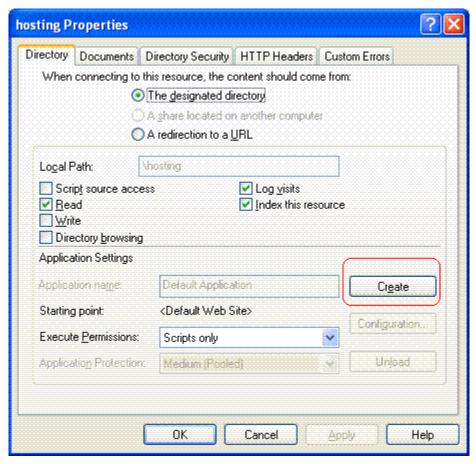
# **Step 3: Set Security on New Folders**

This procedure lets **Ektron CMS400.NET** users upload files to the library.

- 1. Within IIS manager, navigate to the folder created in "Step 2: Copy Files to Destination Directory" on page 119.
- For the uploadedfiles and uploadedimages directories, right click on the folder and choose **Properties**. On the **Directory** tab of the Properties dialog, ensure that the **Write** attribute is checked.
- 3. Exit IIS manager.
- Open Windows Explorer.
- 5. Navigate to new Web site's folder.
- 6. Right click the uploadedfiles directory, and choose **Properties**.
- On the **General** tab of the properties dialog, ensure the Read-Only attribute is not checked.
- 8. On the **Security** tab of the properties dialog, ensure that the IIS anonymous user (usually named "IUSR\_COMPUTERNAME") has Write permission.
- 9. Right click the uploadedimages directory, and choose Properties.
- 10. Repeat steps 7 and 8 for the uploadedimages directory.

# Step 4: Make the New Directory an IIS Application

- 1. Within IIS manager, right mouse click the folder created in "Step 2: Copy Files to Destination Directory" on page 119.
- 2. Select Properties.
- 3. In the Application Settings area, click Create.



4. Click OK.

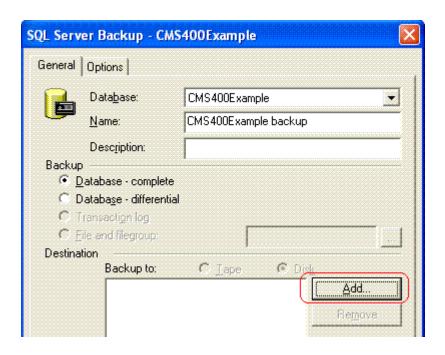
### Step 5: Back up the Database

### WARNING!

Do not use SQL Server Data Transformation Services to move the database. This feature is not compatible with Ektron CMS400.NET.

Ektron recommends backing up the database in the source folder then restoring the database backup to the destination folder. This procedure is described below.

- 1. In the **Ektron CMS400.NET** source folder, open the web.config file and verify the name of the database. The database name appears after key="ek\_dbCatalog" value=.
- 2. On the source server, open SQL Enterprise Manager and navigate to the database you identified in Step 1.
- 3. Right mouse click the database then select **All tasks > Backup database**.
- 4. Select a destination file name by clicking the **Add** button in the Destination area of the SQL Server Backup screen.



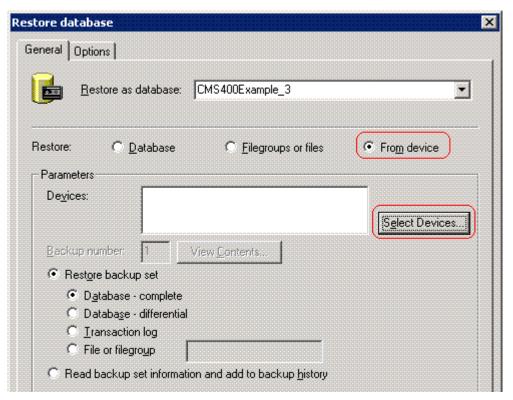
# Step 6: Create a New Database

- 1. On the Destination server, open SQL Enterprise Manager.
- 2. Expand the display until you see the Databases folder.
- 3. Right click the Databases folder.
- Choose New Database....
- 5. Assign a name to the database.
- 6. The remaining options can remain as defaults, or you can be edit them as needed.

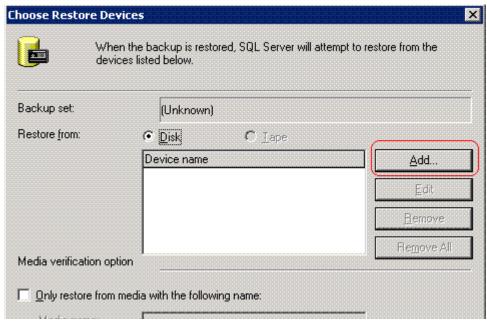
# **Step 7: Restore the Database**

Restore the database to the new destination folder. To do this, follow these steps.

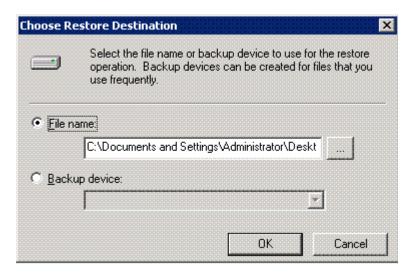
- Right click the database you created in "Step 6: Create a New Database" on page 122.
- Select All Tasks > Restore database.



- 3. In the **Restore as database** field, verify that the database you created in Step 6 appears.
- 4. In the **Restore** section, click **From device** (circled above).
- 5. Click the **Select Devices** button (circled above).
- The Choose Restore Devices screen appears. Click the Add button (circled below).



7. On the Choose Restore Destination screen (below), select **File name** and navigate to the backup file you copied to the destination folder.



8. Press **OK** three times. SQL copies the data to the database you created in "Step 6: Create a New Database" on page 122.

# **Step 8: Set Security on the Copied Database**

- 1. This procedure is described in "Set Up a User for the CMS400 Database" on page 101. Do this for the following users.
- IUSER
- ASPNET User

# Step 9: Update web.config on the Destination Site

- 1. Within the destination site folder, open the web.config file.
- 2. Modify the following values as needed.

Web.config element	How to Modify
ek_dbCatalog	The name of the new database, if you changed it
ek_dbUsername	The database user, if you created one
ek_dbPassword	The database password, if you created one
ek_dbTrustedConnecti on	Whether the new database uses a trusted connection
ek_sitePath	The path to the new folder, relative to the server's webroot folder
WSPath	The full path to the folder that stores the Web Service URL for Server Controls at design time

# Managing the web.config File

Ektron CMS400.NET's web.config file lets you control many key functions of the content management system. When you install Ektron CMS400.NET, web.config is placed into webroot/cms400demo.

This section explains the settings in the web.config file.

#### NOTE

In CMS300 and CMS200, most web.config settings were handled in the setup.xxx file.

If your server is currently running another .NET application, you must merge that web.config file with this one.

Note that all **Ektron CMS400.NET** settings begin with ek\_ and reside within the <appSettings> tags of the web.config file. This prefix distinguishes **Ektron CMS400.NET**'s tags from others.

# Settings in the web.config File

Setting	Description
enableAnalytics	Determines whether Ektron CMS400.NET tracks content analytics statistics in the database.  For more information, see the Ektron CMS400.NET Administrator manual > "Content Analytics Feature" > "Enabling the Content Analytics Feature."  Possible values are true and false.
appendTollSLog	Determines whether Ektron CMS400.NET tracks content analytics statistics in the IIS Log.  For more information, see the Ektron CMS400.NET Administrator manual > "Content Analytics Feature" > "Writing to the IIS Log."  Possible values are true and false.

Setting	Description
recordsBeforeWrite	Used to determine the frequency of writing content analytics statistics to the database (in number of page views).  For more information, see the Ektron CMS400.NET Administrator manual > "Content Analytics Feature" > "Specifying the Frequency of Writing to the Database."
timeBeforeWrite	Used to determine the frequency of writing content analytics statistics to the database (in seconds).  For more information, see the Ektron CMS400.NET Administrator manual > "Content Analytics Feature" > "Specifying the Frequency of Writing to the Database."
ek_dbCatalog	The name of the SQL database you are using.
ek_dbServer	The name of the database server to which <b>Ektron CMS400.NET</b> is installed. If installed locally, the value is <b>localhost</b> . This value is set during installation, at the Host screen.
ek_dbConnectionType	Should be SQL for SQL authentication.
ek_dbDatabase	MSSQL is currently the only supported database
ek_dbUsername	If required, specify the username used to connect to the DSN. This user account must have at least read and write permissions to the database.
	Note: This value can be blank if you are using Windows authentication.
ek_dbPassword	If required, specify the password for the username given. It should match your database name.
	Note: This value can be blank if you are using Windows authentication.
ek_dbTrustedConnection	For SQL authentication, set to <b>false</b> . In this case, username and password are required.  For Windows authentication, set to <b>true</b> . If set to <b>true</b> , Windows handles security when connecting to the database. In this case,.NET impersonates the user coming from IIS, eliminating the need for the ASPNET account.

Setting	Description
ek_dateFormat	Enter a pattern describing how dates and times are stored in your database.
ek_workareaDateFormat	Choose how you want to display dates in some areas of the Workarea.
	<ul> <li>long - for example, Saturday May 21, 2005</li> </ul>
	• short - for example, 5/21/2005
ek_sitePath	The location of <b>Ektron CMS400.NET</b> relative to the Web root. This value is set during installation at the Site Path Directory screen. If you move <b>Ektron CMS400.NET</b> to another folder, you must update this value.
ek_buildNumber	This value is set by the installation program. You typically would not change it.
ek_version	This value is set by the installation program. You typically would not change it.
ek_appPath	This element is prefixed by the ek_sitePath value and describes the location of the workarea folder. This file stores external applications (such as eWebEditPro and eWebDiff), templates, and the images folder.
ek_xmlPath	The location of the xmlfiles directory. The ek_sitePath path is prefixed to this location.
	You would only change this value if you want to move the location of the xml files relative to the Web root.
ek_pluginDir	not used currently for future use
ek_appName	The name of the application, CMS400. You typically would not change this value.
ek_RedirectorInstalled	Sets whether the redirector is turned on or off in the Ektron CMS400.NET Workarea. Turning the redirector on enables the option of aliasing the URL of your Web site. The default is false.
	True = Aliasing turned on
	False = Aliasing turned off  See Alex: The Administrator's Manual section "LIPI Aliasing"
	See Also: The Administrator's Manual section "URL Aliasing".

Setting	Description
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 the list contains .aspx.
	NOTE You can enter one or more extensions. Each extension must begin with a period, and the last extension must be followed by a comma (,).
	See Also: The Administrator's Manual section "URL Aliasing".

**String Values** - These strings appear in **Ektron CMS400.NET** before the user logs in. They are placed here because this file is outside the database. Edit them if you want to translate them to another language or to make them more specific to your installation.

String	Default Text
ek_String_1	Login
ek_String_2	Invalid username or password.
ek_String_3	Please try again.
ek_String_4	User:
ek_String_5	Pwd:
ek_String_6	Enter your username and password.
ek_String_7	Click here to close this window
ek_String_8	Click here to log in
ek_String_9	All the words
ek_String_10	Any of the words
ek_String_11	Exact Phrase
ek_String_12	Match Partial Words
ek_String_13	The search resulted in zero matches
ek_String_14	The following error occurred while trying to login:

Setting	Description
ek_String_15	Domain
ek_appImagePath	The folder that stores the images within Ektron CMS400.NET, such as toolbar icons. You would only change this value if you need to move the images folder to another location.  Note that this value is prefixed by the value set in the ek_appPath variable. By default, ek_appPath is set to <a href="webroot/cms400demo/workarea/">workarea/</a> . So, by default, this folder is set to <a href="webroot/cms400demo/workarea/images/application/">webroot/cms400demo/workarea/images/application/</a> .
ek_appeWebPath	The folder that stores eWebEditPro, Ektron CMS400.NET's editor. You would only change this value if you need to move the editor to another location.  Note that this value is prefixed by the value set in the ek_appeWebPath variable. By default, ek_appeWebPath is set to webroot/cms400demo/workarea/. So, by default, this folder is set to webroot/cms400demo/workarea/ewebeditpro.

**Images** - Similar to text strings, these images appear before the user signs in, so cannot be stored in the database. Update as needed.

Their location is set in the ek\_appImagePath variable. See Also: "ek\_appImagePath" on page 130

Setting	Description
ek_Image_1	close button CLOSE
ek_Image_2	small login button
ek_Image_3	big login button LOGIN

### **SMTP server configuration -** See "Configuring SMTP Settings" on page 140

Setting	Description
ek_SMTPServer	The server that processes email
ek_SMTPPort	The port your system uses to retrieve email
ek_SMTPUser	The username set up to send and receive email
ek_SMTPPass	The password set up to send and receive email

Setting	Description	
Mail Format		
ek_MailFormat	The format of the email created in <b>Ektron CMS400.NET</b> . A value of <b>HTML</b> generates email in HTML format, while a value of <b>Text</b> generates plain text email.	
SSL Support - See "Updating the web.config File" on page 161		
ek_UseSSL	Determines if server will use SSL for security	
ek_SSL_Port	SSL port used by Web server.	
Active Directory Server Configuration		
ek_ADEnabled	Whether your Ektron CMS400.NET uses Active Directory support.	
ek_AUTH_Protocol	The directory access protocol used with the Active Directory feature. The default value is LDAP. Other protocols are GC (global catalog) and WINNT.	
Menu Settings		
ek_UserMenuType	Determines the appearance of the menu that appears within every content block after the user signs in.	
	New dynamic menu - menu only appears when user moves cursor over content block	
	1 - Old classic menu - menu always appears	
	See Also: Ektron CMS400.NET Administrator Manual section "Introduction to Ektron CMS400" > "Getting Started" > "Recognizing Content Blocks" > "The Floating Toolbar"	
ek_MenuDisplayType		
ok_Monubiopidy Typo	This setting only works if ek_UserMenuType is set to zero (0).	
	Determines the appearance of the menu that appears within every content block after the user signs in.	
	0 - Horizontal - menu icons are arranged horizontally	
	1- Vertical - menu icons are arranged vertically and include the tooltip text	
	See Also: Ektron CMS400.NET Administrator Manual section "Introduction to Ektron CMS400" > "Getting Started" > "Recognizing Content Blocks" > "The Floating Toolbar"	
Multilingual Settings		

Setting	Description
ek_EnableMultilingual	Enable or disable support for multilingual content  1- enable  0 -disable  See Also: Ektron CMS400.NET Administrator Manual section  "Multi-Language Support" > "Working with Multi-Language Content"  > "Enabling/Disabling Support for Multiple Language Content"
ek_DefaultContentLanguage	Sets the four-digit, decimal representation of the default content language. For example, American English is 1033.  If you have another version of an Ektron CMS (e.g., CMS200) or an earlier than 4.7 version of CMS400, all content blocks are set to this value during the upgrade.  See Also: Ektron CMS400.NET Administrator Manual section "Multi-Language Support" > "Working with Multi-Language Content" > "The Default Language"
ek_ServerURL	Mainly used in Web services to determine the location of a remote server.  For example, in a Web farm environment, the content server can reside in a remote location. In this case, the developer's content is replaced with this value, so all <img src=""/> and <href here="" instead="" local="" named="" of="" one.<="" point="" references="" server="" td="" the="" to=""></href>
Miscellaneous Settings	
WSPath	Determines the location of the Web services page used by the server controls at design time.
ek_BatchSize	The amount of files that can be uploaded at the same time. The default is <b>4</b> , but it can be any non negative number.  Note: Users can upload any amount of files. The system handles them four at a time.
ek_loginAttempts	Ektron CMS400.NET has a login security feature that, by default, locks out a user after five unsuccessful attempts to log in. That feature is controlled by this element.  For details, see the Ektron CMS400.NET Administrator Manual section "Getting Started"> "Logging Into an Ektron CMS400.NET Web Site" > "Restricting Login Attempts."

Setting	Description
ek_passwordCaseSensitive	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 this element from <b>false</b> to <b>true</b> .
	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 sign on.
ek_LinkManagement	This setting determines if <b>Ektron CMS400.NET</b> uses linkit.aspx when inserting a quicklink. By default, it is set to true.
	If set to true, when a user inserts a quicklink, <b>Ektron CMS400.NET</b> inserts a <i>special link</i> instead of a quicklink. A special link determines the correct quicklink to use when a site visitor clicks it.
	For example, a user adds a content block to folder A. A quicklink to that content is a.aspx?id=10. Later, if an administrator changes the folder's template but doesn't update the quicklink within the content block, the quicklink is broken.
	To avoid this problem, enable link management.
ek_LoginScreenWidth	The width of the login screen in pixels. You may need to widen the screen if you are using Active Directory and the database names are long.
ek_ToolBarFormatTag	Note: This setting only applies <i>after</i> a user signs in to your site.
	Change this setting if the colored border that surrounds content looks wrong. (The border color indicates the content's status.)  By default,  tags create the border. If the border looks wrong or inappropriate, change setting to div. If you do, <div> tags are used to draw the border instead of  tags.  This change typically solves the problem.</div>

Setting	Description
ek_PageSize	This setting determines 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]
	Note: The above text changes depending on the page you are viewing.
	You must click an option to see and update the remaining items.  This setting affects pages that let you edit the following items:
	content
	library items
	menu items
	collection items
	membership users
	membership users not verified
	• forums
HttpHandlers	This section sets how the URL Aliasing feature handles URLs with certain extensions. If you have any extension you do not want aliased, add it below the following line using the same syntax.  add verb="*" path="*.png" type="URLRewrite.StaticFileHandler,Ektron.Cms .URLRewriter" />
maxRequestLength	This setting determines the maximum size of files that can be uploaded to your server. The default setting is 204,800 kilobytes, or 200 MB.
	Enter the desired value in kilobytes. To convert megabytes to kilobytes, go to http://www.onlineconversion.com/computer.htm.

# Configuring E-Mail Notifications for Tasks and Content Workflow

An email is sent to notify users when a task (such as approving a content block or submitting a form) was performed or needs to be performed. This section explains the steps needed to use Microsoft's SMTP service to enable this kind of e-mail notification in Ektron CMS400.NET.

To learn about email notification for Web Alerts, see "Installing the Web Alert Feature" on page 144.

#### **CDOSYS**

To process email, **Ektron CMS400.NET** uses the CDOSYS model. Using the Simple Mail Transport Protocol (SMTP) and the Network News Transfer Protocol (NNTP) standards, CDOSYS enables applications based on Windows XP, Windows 2000 or Windows 2003 to route e-mail and USENET-style news posts across multiple platforms.

CDOSYS, the successor to CDONTS, is as easy to use as CDONTS but is more powerful by letting authors create and view sophisticated emails using html and data sources.

#### NOTE

If the SMTP server that is processing email does not find CDOSYS installed, it tries to use CDONTS as a mail server protocol.

#### Set up SMTP Server

For CDOSYS to work, set up the SMTP server on your local system (to which you installed **Ektron CMS400.NET**) or a remote system that sends and receives email.

#### NOTE

To access an SMTP server on a local or remote system, consult the system administrator who manages email in your organization. This administrator may not be the same as the Ektron CMS400.NET administrator.

 Local - Before setting up an SMTP server on your local system, install IIS. The SMTP server settings on a local system would be something like this:

```
"ek_SMTPServer" value="localhost"
"ek_SMTPServer" value="127.0.0.1"
"ek_SMTPServer" value="myname"
```

 Remote - Set up an SMTP server on a remote system. The SMTP server on a remote system can be something like this:

```
"ek_SMTPServer" value= "smtp.yourserver.com"
"ek_SMTPServer" value= "yourserver.com"
```

After the SMTP server is set up, configure it as described in "Verification for Relay" on page 136.

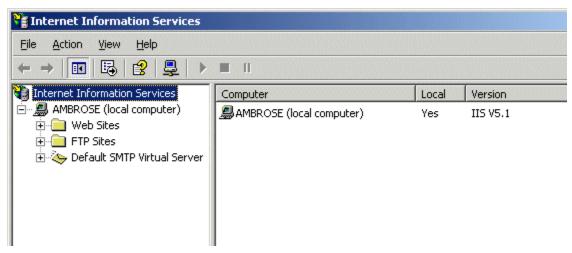
# Verification for Relay

To verify that your Ektron CMS400.NET Web server's IP address supports relay through your SMTP server, follow these steps.

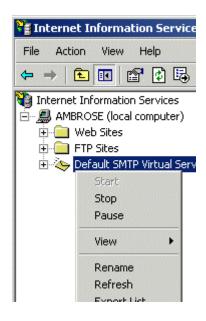
#### NOTE

The WWW and SMTP components of IIS must be installed on the Web server to which Ektron CMS400.NET is installed.

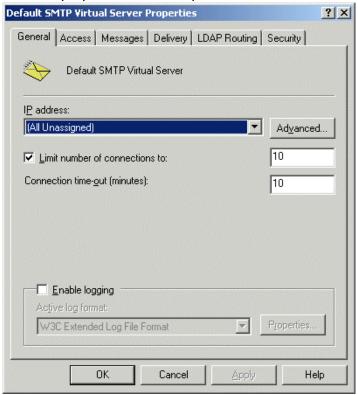
1. On your SMTP server, access your Internet Services Manager in the Administrative Tools.



- 2. In the IIS Management Console, select the SMTP virtual server.
- 3. On the Action menu, click **Properties**.



4. The SMTP properties window opens.

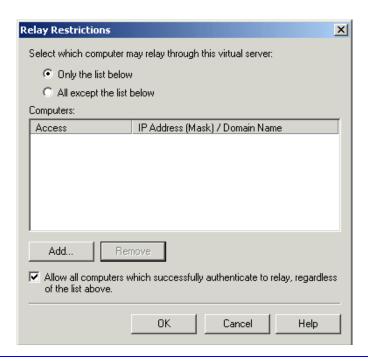


5. Click the Access tab.

Default SMTP Virtual Server Properties ? X General Access Messages Delivery LDAP Routing Security Access control Edit the authentication methods for this Authentication. resource. Secure communication View or set the secure communications Certificate... method used when this virtual server is accessed. Communication. Connection control Grant or deny access to this resouce using Connection... IP addresses or Internet domain names. Relay restrictions: Grant or deny permissions to relay e-mail Relay... through this SMTP virtual server. OΚ Cancel Help

6. The access properties appear.

- 7. In the Relay Restrictions section, click the Relay... button.
- 8. The Relay Restrictions window opens. Set or remove relay restrictions.



#### NOTE

For more information, see "Setting or Removing Relay Restrictions from a Virtual Server" from this Web page: <a href="http://www.microsoft.com/WINDOWS2000/en/professional/help/moc04\_57.htm">http://www.microsoft.com/WINDOWS2000/en/professional/help/moc04\_57.htm</a>

# Configuring SMTP Settings

Next, configure Ektron CMS400.NET to use SMTP.

- Open the web.config file. (See "Managing the web.config File" on page 126.)
- 2. Move to the section of the file that has these settings.

 Set the ek\_SMTPServer value. See "Set up SMTP Server" on page 135.

- 4. Set the ek\_SMTPPort value to the port your system will access to retrieve email. In most cases, the port is set to 25. If that is not the case, see your System Administrator.
- 5. Set the ek\_SMTPUser value to the username that is set up for the SMTP Server to send and receive email. Typically, the username takes the form of an email address, such as "ek\_SMTPUser" value="yourname@companyname.com".

This retrieval of email is based on how basic authentication is set up for you, though you do not need a username when using a local SMTP server. Check with your System Administrator for details.

If you are using a remote system for accessing email, you must provide an authenticated username before you can send or receive email.

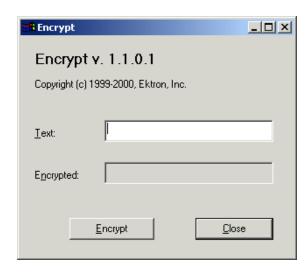
6. Set the "ek\_SMTPPass" value to the password that is set up for the SMTP server to send and receive email. This password is based on the basic authentication. By default, the Ektron CMS400.NET only accepts passwords in the encrypted form.

To encrypt the password, Ektron provides a password encrypting tool. See "The Encrypt Password Utility" on page 141.

#### The Encrypt Password Utility

To use the utility tool EncryptEmailPassword.exe, follow these steps.

- 1. Open C:\Program Files\Ektron\CMS400\Utilities
- 2. Run EncryptEmailPassword.exe.
- 3. The Encrypt Utility dialog appears.



- 4. Enter your SMTP password in the Text field.
- 5. Click the **Encrypt** button.
- The screen displays an encrypted password in the **Encrypted** field.
- 7. Copy the encrypted password and paste it into the web.config file after "ek\_SMTPPass" value=.

### **Error Messages**

When submitting a form or a content block in an approval process, if you get an error message listed below, it is generated by the SMTP server on which you set up the mail system, *not* by **Ektron CMS400.NET**.

- The Transport failed to connect to the server. [CBR SendMail R1] [CBR R65] [DIO R 36]
- The server rejected one or more recipient addresses. The server response was: 550 5.7.1 Unable to replay for yourname@company.com [CBR SendMail R1] [CBR R1] [DIO R36]

#### What's Next?

After you set up the mail server, you can begin using **Ektron CMS400.NET**. For e-mail notification to work properly in Ektron CMS400.NET, the following criteria must be met.

- Valid system email address
- Email notification is enabled in the settings table
- Valid user email address
- User email notification is enabled

For information about these settings, refer to the Administrator Manual.

# Installing the 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.

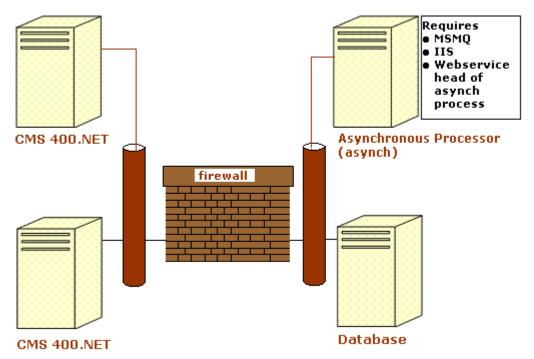
For example, anyone may register to be notified whenever new information about your product is published. As soon as the page is published on your site, registered users receive an email announcement with a link to the new/updated page. The recipient clicks the link and immediately accesses the page.

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.

This section describes how to install the Web Alert feature. For additional information about setting up and using the feature, see the **Ektron CMS400.NET** Administrator manual section "Web Alert Feature."

# **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
Set up message queue and asynchronous pro- cessor.		"Setting Up the Message Queue and Asynchronous Processor" on page 148

Ste	ер	Description	For more information, see
2.	Create messages.	Define components of the email to be sent to subscribers.	Ektron CMS400.NET Administrator Manual section "Web Alerts" > "Creating the email Message"
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.	Ektron CMS400.NET Administrator Manual section "Web Alerts" > "Defining Subscriptions"
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  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	Ektron CMS400.NET Administrator Manual section "Web Alerts" > "Assigning Web Alert Information to Folders and Content"
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.	Ektron CMS400.NET Developer's Manual > "Introduction to Ektron CMS400.NET Server Controls "> "Membership Server Control"
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.	Ektron CMS400.NET Administrator Manual section "Web Alerts" > "How Users Sign up for Subscriptions"
7.	CMS users can also subscribe.		Ektron CMS400.NET Administrator Manual section "Web Alerts" > "CMS User Subscription Sign Up"

St	ер	Description	For more information, see
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

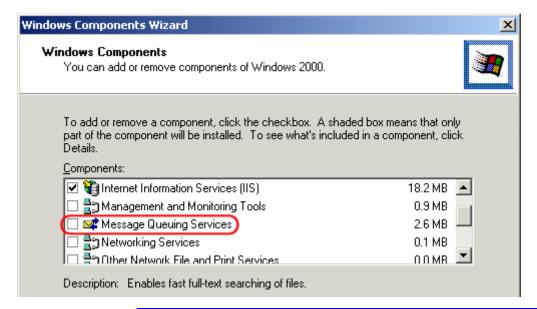
After installing **Ektron CMS400.NET** version 5.1 or higher, you need to set up the Microsoft Message Queuing and the Ektron Asynchronous Processor. It is assumed that the following directories and files are installed on your server:

- C:\Program Files\Ektron\CMS400v61\EktronAsyncProcessor\_Service\
- C:\inetpub\wwwroot\cms400demo\bin\EktronAsyncProcessorWS.dll
- C:\inetpub\wwwroot\cms400demo\Workarea\webservices\EktronAsyncProc essorWS.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.

- On the server that hosts Ektron CMS400.NET, go to Control Panel > Add/Remove programs > Add/Remove Windows Components.
- 2. If it is not checked, check **Message Queuing Services**.



#### **NOTE** On Windows 2003, it is within the Application Server Components group.

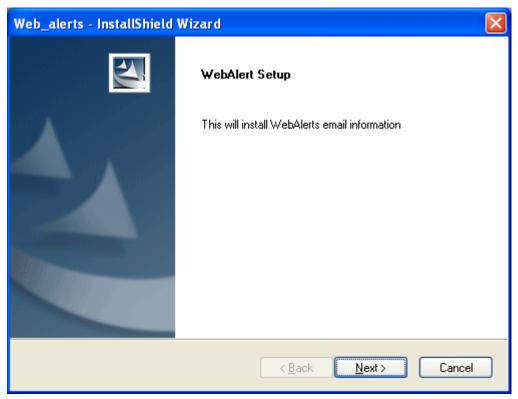
3. If **Message Queuing Services** was checked when you viewed it, go to step 4.

If it was not checked, click **Next**. A wizard creates the component.

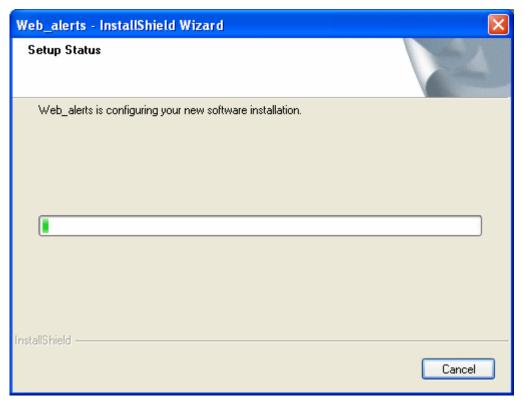
#### NOTE

The rest of this procedure employs a wizard that saves you several manual steps. If you have a problem using the wizard, or prefer to install Web Alerts manually so you can track the files being installed to your server, see "Manual Steps for Setting up the Message Queue and Asynchronous Processor" on page 154.

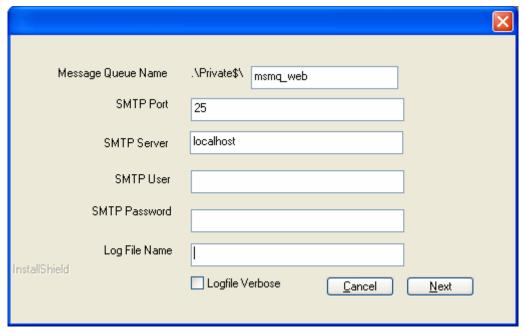
- 4. From the Windows Start Menu, click All Programs > Ektron > CMS400 > Utilities > Web Alerts Setup.
- 5. The Web Alert Wizard setup screen appears.



6. Press **Next**. The wizard begins installing the Web Alerts feature.



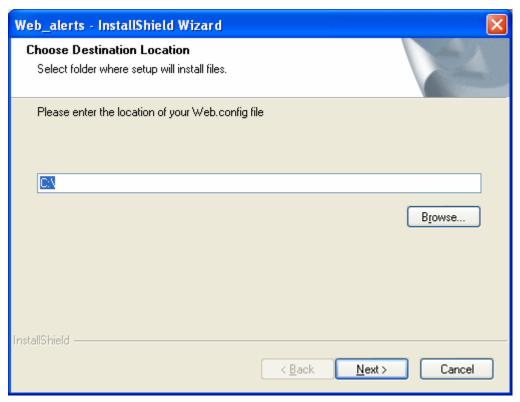
7. The following screen appears.



- 8. Enter the username and password that will be used to send and receive email.
- At the Log File Name field, enter the name of the file that will track Web Alert activities. If you enter nothing, the file is named listener.log.

The file resides in the c:\program
Files\Ektron\CMS400v61\EktronAsyncProcessor\_Service folder. It is also available from the Workarea. See "Asynchronous Log File Reporting" on page 156.

- 10. If you want a very detailed log file, click Logfile Verbose.
- 11. Press **Next**. The following screen appears.



- 12. Either insert or browse to the folder that contains your web.config file. This is your site root folder. Then press **Next**.
- 13. If your Asynchronous Processor service is not running, the following message appears.



- 14. If you see this message, press **OK** then click **Finish**.
- Go to Control Panel > Administrative Tools > Computer Management > Services and Applications > Services. Start the Ektron Async Processor Service.

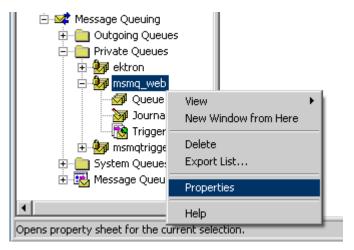
# Manual Steps for Setting up the Message Queue and Asynchronous Processor

This section describes manual steps for setting up the Message Queue and Asynchronous Processor. You can use this procedure if you had a problem using the wizard, or you want to know which files are being installed to your server.

- Go to Control Panel > Administrative Tools > Computer Management > Services and Applications > Message Queuing.
- Right click the Private Queues folder and select New > Private Queue.



- 3. Create a private queue named msmq\_web.
- 4. Right click msmq\_web and select Properties.



- 5. 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 want better 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.

- 6. Click OK.
- 7. Open the following file:

 $\label{lem:condition} C:\operatorname{Program} $$\operatorname{Ektron}_{MS400v52}\to\operatorname{EktronAsyncProcessor}_Service\operatorname{RegEktron.S}$$ ervices.EktronAsyncProcessor.bat$ 

8. 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.

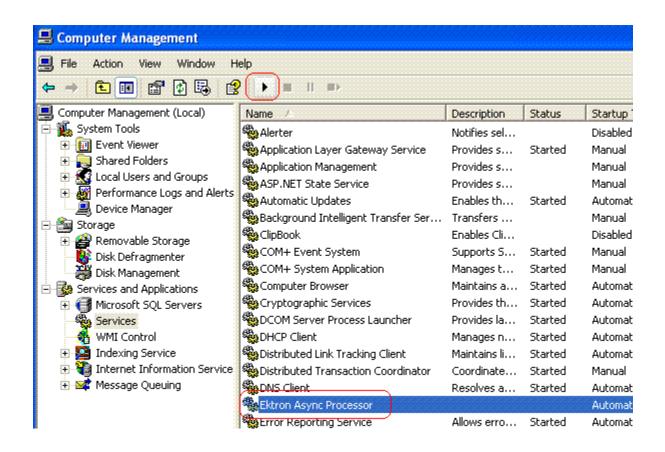
9. Execute the .bat file.

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

 $\begin{tabular}{ll} $\tt C:\Windows\Microsoft.NET\Framework\v1.1.4322\installutil \\ \tt "C:\program \end{tabular}$ 

Files\Ektron\CMS400v52\EktronAsyncProcessor\_Service\Ektron.Services.EktronAsyncProcessor.exe"

- 10. Open the following file and enter your SMTP connection settings: c:\Program
  - Files\Ektron\CMS400v52\EktronAsyncProcessor\_Service\Ektron.Services.EktronAsyncProcessor.exe.config.
- 11. 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 is 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 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.
- Click the Asynchronous Log File link.
- 3. If the log has captured any problems, they are displayed on the screen.

#### Content Reports: Asynchronous Log File Report





#### Log File

Date: Tuesday, November 01, 2005 4:16:31 PM

Exception Message: Access to Message Queuing system is denied.

Stack Trace: at System.Messaging.MQCacheableInfo.get\_ReadHandle()

at System.Messaging.MessageQueue.StaleSafeReceiveMessage(UInt32 time at System.Messaging.MessageQueue.ReceiveCurrent(TimeSpan timeout, Int3

at System.Messaging.MessageQueue.Receive()

at Ektron.Services.EktronAsyncProcessor.a.a()

Date: Tuesday, November 01, 2005 4:16:33 PM

Exception Message: Access to Message Queuing system is denied.

Stack Trace: at System.Messaging.MQCacheableInfo.get ReadHandle()

at System.Messaging.MessageQueue.StaleSafeReceiveMessage(UInt32 time

at System.Messaging.MessageQueue.ReceiveCurrent(TimeSpan timeout, Int3

at System.Messaging.MessageQueue.Receive()

at Ektron.Services.EktronAsyncProcessor.a.a()

# Configuring SSL

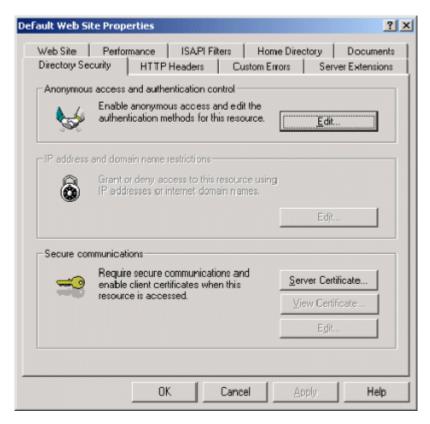
In **Ektron CMS400.NET**, you can use SSL when users log in to your Web site. SSL encrypts the username and password during transmissions to the server.

When you set up the SSL certificate, and configure Ektron CMS400.NET to use it, the login page is launched in a Secure Socket Layer. This section explains how to set up SSL for Ektron CMS400.NET.

# Setting Up the Certificate

If your Web server does not have a certificate installed, you need to install one. To do so, follow these steps.

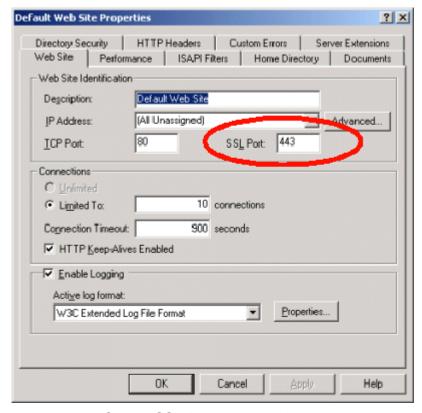
- 1. Access the Internet Information Server Administrator Console on your Web server.
- 2. Navigate to the computer and Web site to which Ektron CMS400.NET is installed.
- 3. Right click on the Web site.
- 4. Click Properties.
- 5. Click the **Directory Security** tab.



6. In the Secure communications area, click the **Server Certificate** button.



- 7. Use the wizard to set up a certificate for your Web site.
- 8. Close the wizard. You return to the Properties window.
- 9. Click the **Web Site** tab at the top of the Properties window.



- 10. Set the **SSL Port** that the Web server will use.
- 11. Click **OK**.

# Updating the web.config File

Next, configure Ektron CMS400.NET to use the SSL certificate.

- Open the web.config file. (See "Managing the web.config File" on page 126.)
- 2. Move to the section of the file that has these settings.

```
<add key="ek_UseSSL" value="false" />
<add key="ek_SSL_Port" value="443" />
```

3. Set the ek\_Usessl value to true.

#### WARNING!

If the  $ek_{\tt UseSSL}$  value is **true**, but you did not install the certificate to the Web Server, you cannot log into Ektron CMS400.NET.

- 4. Set the ek\_SSL\_Port value to **443** (unless you specified another SSL port).
- 5. Save and close the file.

You are ready to use the SSL support for Ektron CMS400.NET.

# **Customizing Ektron CMS400.NET**

The following chapter contains information about customizing your **Ektron CMS400.NET** application. The topics that are discussed are:

- "Customizing Ektron CMS400.NET email" on page 164
- "Branding Ektron CMS400.NET" on page 169

# Customizing Ektron CMS400.NET email

#### Introduction

Ektron CMS400.NET can send email notification to users, informing them that actions have either taken place or are requested of them. For example, a content contributor receives an email that his content has been published to the Web site.

These emails are stored in and received from the app\_messages table in the database. In that table, each email consists of one string for the subject and one for the body. Ektron CMS400.NET does not currently support HTML emails, however the messages are fully customizable.

The body of an email often includes variables, which are between the @ symbols. Ektron CMS400.NET replaces these variables on the fly with the information for that instance of the email. For example, @appContentTitle@ in the following sentence is replaced with the email's title.

Before	The content "@appContentTitle@" has been deleted.
After	The content "Home Page Content" has been deleted.

These emails can be customized. The variables can be taken out or moved around. More text can be added; text can be rewritten or reorganized.

Before	"@appContentTitle@" has been deleted from the XYZ Web site.
After	"About Us" has been deleted from the XYZ Web site.

Each message is called in the presentation layer by its message title.

Carriage Return/Line Feeds are represented by the variable @appCRLF@. These cause the email to move down one line. For example:

Before	The content was approved.@appCRLF@Thank you!
After	The content was approved. Thank you!

#### **Variables**

The following table lists variables you can use to customize email messages. When the email is sent, the corresponding description replaces the variable.

Variable	Inserts
@appCRLF@	A carriage return.
@appContentTitle@	The title of the content block.
@appDeletionDateTime@	The date and time the content will be deleted from the Web site.
@appChangeDateTime@	The date and time changes will be updated on the Web site.
@appDeclinerFirstName@	The first name of the user who declined the content block.
@appDeclinerLastName@	The last name of the user who declined the content block.
@appSubmitterFirstName@	The first name of the user who submitted the content block.
@appSubmitterLastName@	The last name of the user who submitted the content block.
@appFolderPath@	The location of the content block in the folder tree in the Ektron CMS400.NET Workarea.
@appContentLink@	The link to the content block on the Web site.
	Note: You must be logged in to see the changes.

Variable	Inserts
@appSubmitterDateTime@	The date and time the content block was submitted.
@appApprovalList@	The current approval list that the content block must pass through.
@AppComment@	Displays the comments for the content block.

#### List of Ektron CMS400.NET email

#### **Notify Approval Process Complete**

Because of the logic, there are four emails for notifying that the approval process is complete.

#### **Deletion of Content Approved**

Message Title: email subject: content deletion approved.

Message Text: Deletion of content has been approved.

Message Title: email body: content deletion approved.

Message Text: The deletion of the content "@appContentTitle@" has been approved. The content deletion will occur on: @appDeletionDateTime@.

#### Immediate Deletion of Content

Message Title: email subject: content has been deleted.

Message Text: Content has been deleted.

Message Title: email body: content has been deleted.

Message Text: The deletion of the content "@appContentTitle@" has been approved. The content was deleted immediately.

#### Approved Content Awaiting Go Live Date

Message Title: email subject: content changes approved.

Message Text: Content changes have been approved.

Message Title: email body: content changes approved.

Message Text: The changes to the content "@appContentTitle@" have been approved. The content changes will occur on: @appChangeDateTime@.

#### Approved Content Published Immediately

Message Title: email subject: content has been changed.

Message Text: Content changes have been made.

Message Title: email body: content has been changed.

Message Text: The changes to the content "@appContentTitle@" have been approved. The content changes went live immediately.

#### **Decline Approval Request**

Message Title: email subject: approval request declined.

Message Text: Content approval request declined.

Message Title: email body: approval request declined.

Message Text: Your submitted approval request for the content "@appContentTitle@" has been declined by "@appDeclinerFirstName@ @appDeclinerLastName@".

#### **Send Approval Message**

Message Title: email subject: request for approval.

Message Text: Request for content approval.

Message Title: email body: request for approval.

Message Text: The content "@appContentTitle@" has been submitted for your approval by "@appSubmitterFirstName@ @appSubmitterLastName@".@appCRLF@@appCRLF@To locate the content, the folder path in your Workarea is: @appFolderPath@.@appCRLF@@appCRLF@The following link will

take you to the submitted content block on the Web site: @appContentLink@.@appCRLF@@appCRLF@Please Note: You must login and select the preview icon to view the changes.@appCRLF@@appCRLF@The content was submitted for approval on:

@appSubmittedDateTime@.@appCRLF@@appCRLF@Approvals: @appApprovalList@@appCRLF@@appCRLF@Comment: @appComment@.

# **Branding Ektron CMS400.NET**

Ektron CMS400.NET can be branded by a Web Developer. Through the use of a style sheet and replacing Ektron CMS400.NET's default graphics, the application can take on a different look that is fully customizable. Developers can incorporate a company logo, institute company colors, and control the look and feel of the application to create a personalized, web-based, content management solution.

# Style Sheet

Ektron CMS400.NET's style sheet, global.css, is located in the *I* csslib folder under the **Workarea** directory.

Using widely accepted style sheet classes and class attributes, you can modify the application, including colors, spacing, fonts, etc. Also, if you later upgrade or re-install **Ektron CMS400.NET**, you can reuse this file and retain your changes.

# **Class Explanation**

#### General Classes

Class	Description
.titlebar	Located at the top of every page in the application. Used for page explanations or location explanation. While navigating through Ektron CMS400.NET, this page header or "titlebar" tells the user where he is (for example, Viewing content in content.aspx).
.titlebar-error	Similar to titlebar; used to display error messages.
.input-box-text	In front every input box is text explaining its purpose. This class controls that text.
.title-header	Used under the titlebar to list information. For example, it is used for column headers.
.info	Any important information that should stand out. An example is in the content page when showing the attributes of the content block.
.info-header	Similar to the info class; used for information that should stand out but starts a new section on a page. Examples are <b>metadata</b> and <b>summary</b> on the content block properties page.
.toolbar	The background of the toolbar.
	Note: Change this class only if you are changing all toolbar icons.

#### Workarea Classes

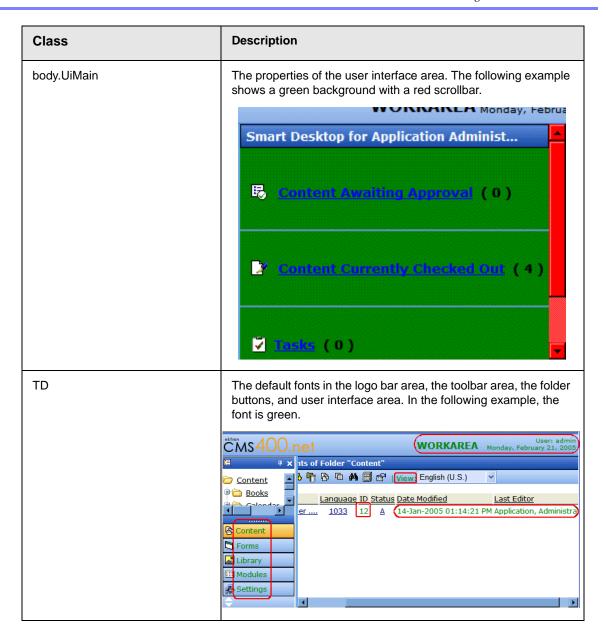
Class	Description
.Workarea	The background color of the Workarea.
td.FolderButtonBarNm	Text of top-level folders that appear in the lower left corner of the Workarea (Content, Forms, Library, Modules and Settings).

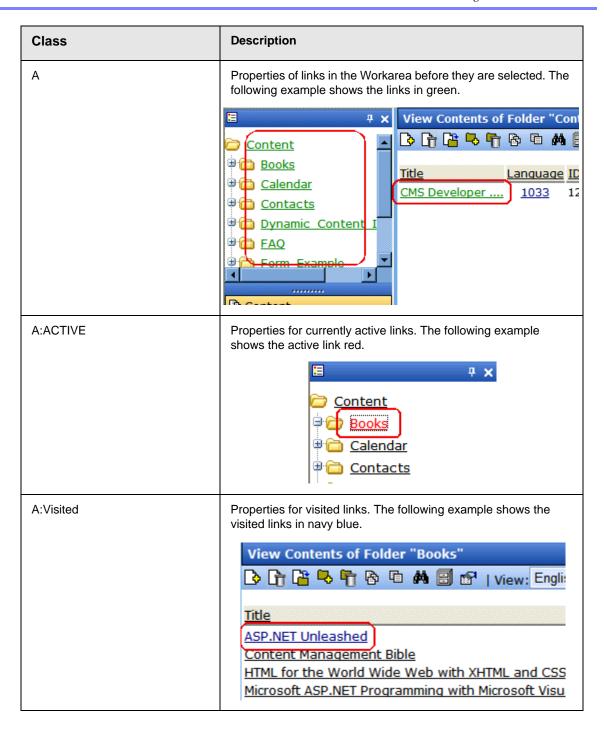
Class	Description
td.FolderButtonBarOver	Text that appears when you hover the cursor over top-level folders that appear in the lower left corner of the Workarea (Content, Forms, Library, Modules and Settings)
td.FolderButtonBarSelectedOver	Selected text in the lower left corner of the Workarea (Content, Forms, Library, Modules and Settings)
td.FolderButtonBarSelected	Text that appears when you hover the cursor over selected text of top-level folders that appear in the lower left corner of the Workarea (Content, Forms, Library, Modules and Settings)
td.FolderResizeBar	The bar at the top of the top-level folders that appear in the lower left corner of the Workarea (Content, Forms, Library, Modules and Settings). Use this bar to switch the display of folders between icons and full buttons.
td.NavIconBarNm	The minimized top level folder icons properties.  The following example shows minimized icons with a brown background.  Done
td.NavlconBarOver	The minimized top level folder icons hover over properties.  The following example shows the Forms icon with a light orange background, while hovering over it.  Done
td.NavlconBarSelectedOver	Properties of the minimized top level folder icons when selected then hovered over.  The following example shows the Forms icon with a dark blue background, while selected and hovering over it.

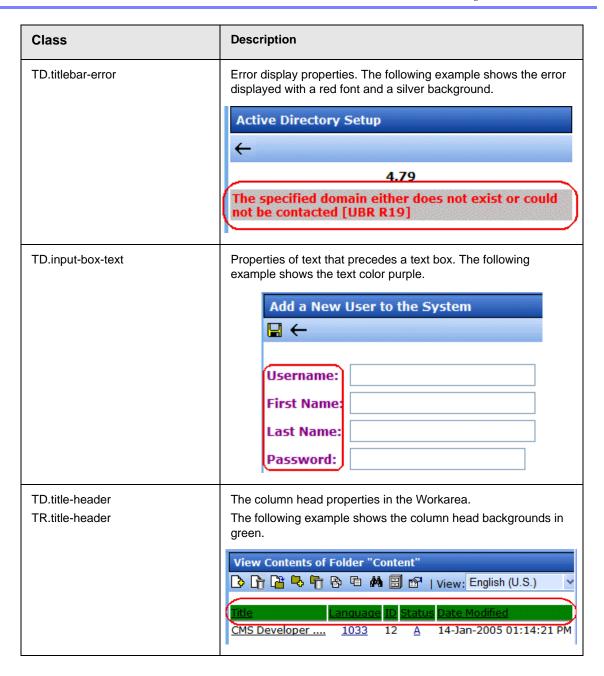
Class	Description
td.NaviconBarSelected	The minimized top level folder icons properties, when selected.  The following example shows the Forms icon with a green background when selected.
body.FolderIconBar	The bottom bar in which the minimized top level folder icons appear. The following example shows the bar green.  Content  Forms  Library  Modules  Settings
table.FolderToolbar	The top left bar where the Smart Desktop and pin buttons are located. The following example shows the bar red.  Smart Desktop  Tasks Reports

Class	Description
body.FolderArea	The folder area on the left of the screen.  The following is an example of a green background with red scrollbars.  Smart Desktop  Tasks  All Open Tasks  Assigned To Me  Assigned By Me  Created By Me  Assigned To User  Not Started
.WorkareaToolbar-nm	The Workarea toolbar properties for the buttons section. The following is an example of a red background.  View Contents of Folder "Content"
.WorkareaToolbar-ovr	The Workarea toolbar icon hover-over properties. The following is an example of View Collections background being green when hovered over.  View Collections  The Workarea toolbar icon hover-over properties. The following is an example of View Collections background being green when hovered over.

Class	Description
.ToolbarImage-nm	Sets the size of the Workarea toolbar icons.  The following is an example of setting the height and width to 35px.
	View Contents of Folder "Content"
	The following example has the height and width set to default 22px.
	View Contents of Folder "Content"  □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □
.WorkareaToolbar-bk	The Workarea toolbar properties for the non-button section.  The following is an example of a red background.
	r "Content"
	I 👫 🗐 😭   View: English (U.S.)
.WorkareaTitlebar	The properties of the titlebar in the Workarea. The following example shows a red background with black letters.
	WOR
	Smart Desktop for Application Administ







Class	Description
A.title-header	The font properties in the column heads.  The following example shows the column heads with green fonts.
	View Contents of Folder "Content"  □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □   View: English (U.S.)  Title Language ID Status Date Modified
TD info	CMS Developer 1033 12 A 14-Jan-2005 01:14:21 PM
TD.info	Description information title properties. The following example shows information titles in purple.  View Content "CMS Developer"   ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
	Properties: Content Title: Content ID: Content Language Status: CMS Developer 12 Content Language English (U.S.) Approved (Published)
	Last User To Edit: admin Last Edit Date: 14-Jan-2005 01:14:21 PM
TD.info-header	Information header label. The following is an example of the information header in green.
	View Content "CMS Developer"
	Properties: Content Summary Metadata Alias Comment Properties: CMS Developer
	Content ID: 12 Content Language English (U.S.)

Class	Description
.moreinfo	Font used on the Smart Desktop in the Workarea. The following example shows the font in green.
	Smart Desktop for Application Administ
	Content Awaiting Approval (0)
	Content Currently Checked Out (3)
	Tasks (0)
td.tab_actived	The active tab properties in the Workarea. The following example shows the active tab with a green font.
	View Content "CMS Developer"     Yes
	Properties Content Summary Metadata Alias Content:
td.tab_disabled	Defines the non-active tab properties in the Workarea.  The following example shows the non-active tabs with a dark blue font and blue background
	View Content "CMS Developer"

Class	Description
td.tab_last	The properties of the space at the end of the tabs. The following example shows that space with a green background.
	ew: English (U.S.)  data Alias Comment Tasks
td.tab_spacer	The properties of the space between the tabs. The following example shows the spaces as green.
	View Content "CMS Developer"     View: English (   Properties   Content   Summary   Metadata   Alias

#### **History Classes**

Class	Description
.history-list	This class is used for two attributes. The TD controls the active date or the version that is presently published. The Anchor class is for the other versions of the content block.

## Login Classes

Class	Controls
.login	The background color of the login and logout screen.

#### Folder Control Classes

Class	Controls
.folder	The font attributes of the folder control.
	NOTE: The font size cannot be controlled by the style sheet. It is set by the browser.

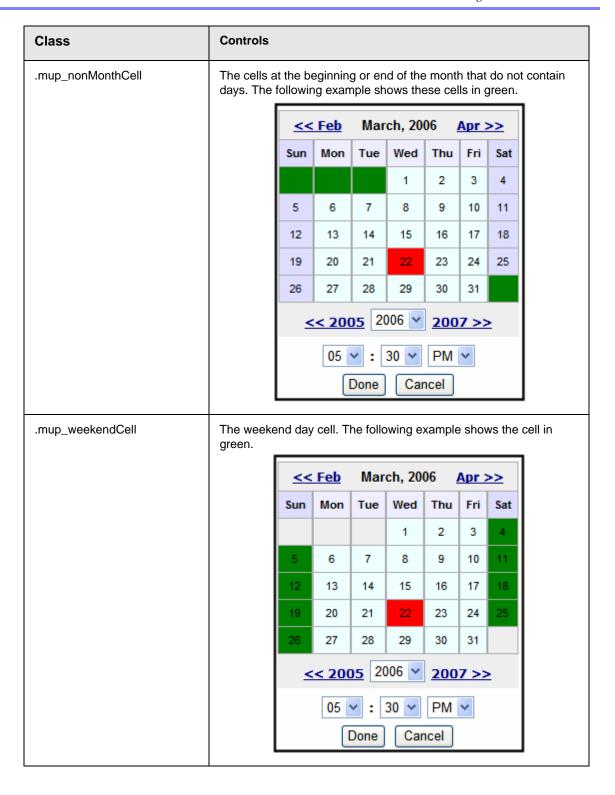
## Library Classes

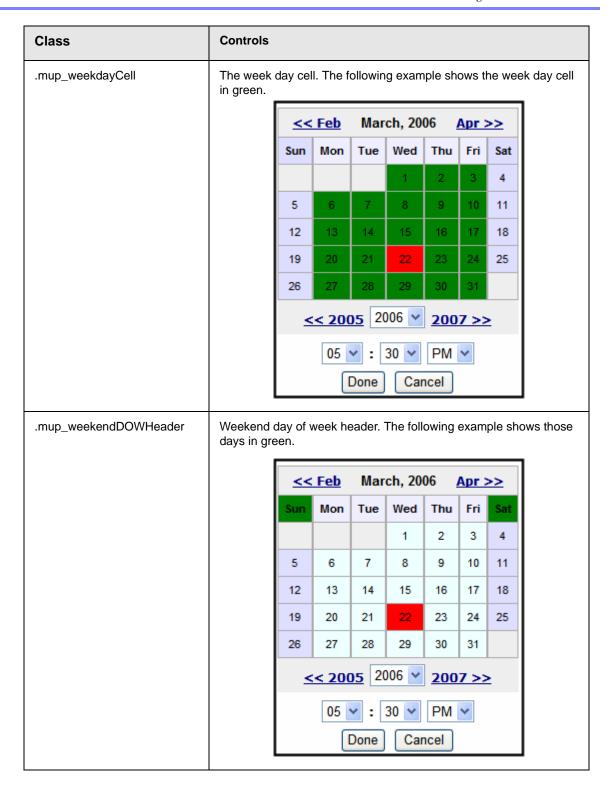
Class	Controls
.library	The background color of the three panels in the library.

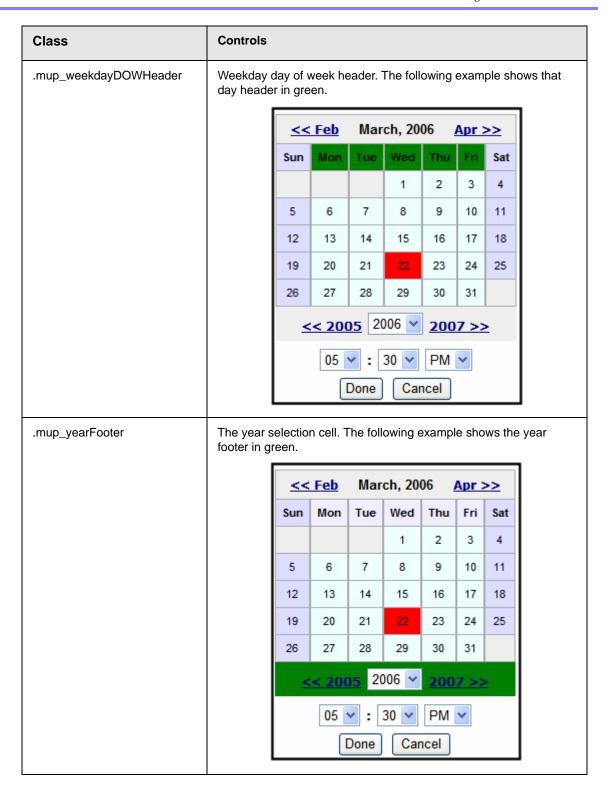
#### Calendar Classes

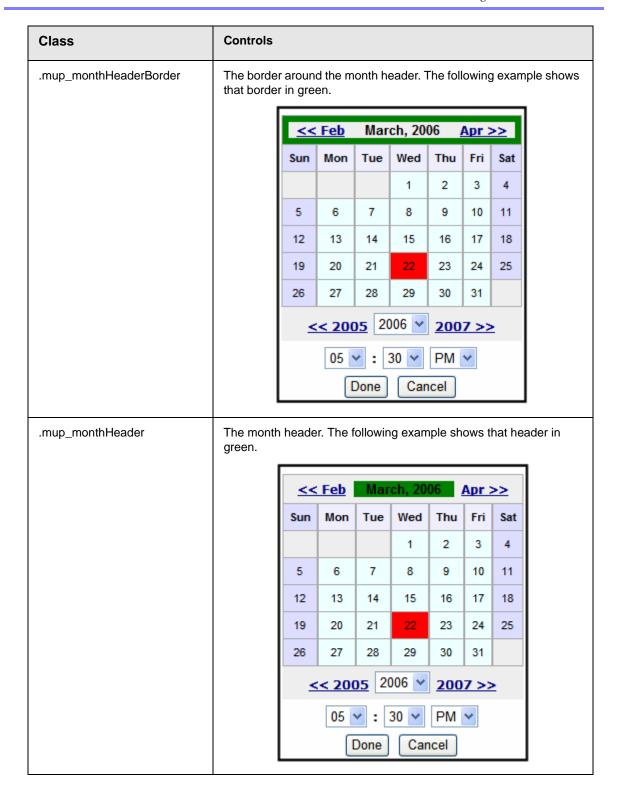
## InternCalendarStyles.css

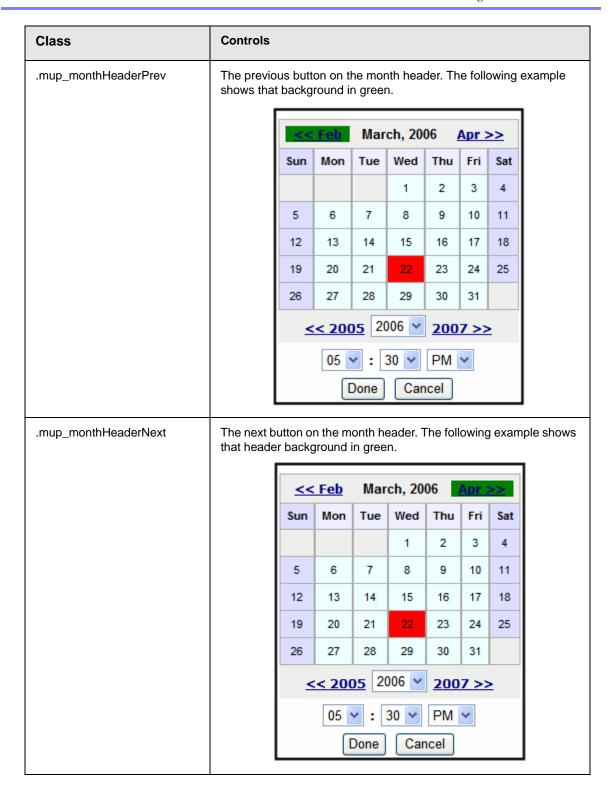
The InternCalendarStyles.css file is used to define the look of the pop-up calendar in Ektron CMS400.NET. This file's default location is \site root folder\Workarea\csslib.











Class	Controls								
.mup_selectedDate	The selected date. The following example shows that date background in red.								
	<< Feb March, 2006 Apr >>								
		Sun	Mon	Tue	Wed	Thu	Fri	Sat	
					1	2	3	4	
		5	6	7	8	9	10	11	
		12	13	14	15	16	17	18	
		19	20	21	22	23	24	25	
		26	27	28	29	30	31		
	<< 2005 2006 <b>2007 &gt;&gt;</b>								
	05 🕶 : 30 🕶 PM 🕶								
	Done Cancel								
.mup_noShow	This class should not be changed.								

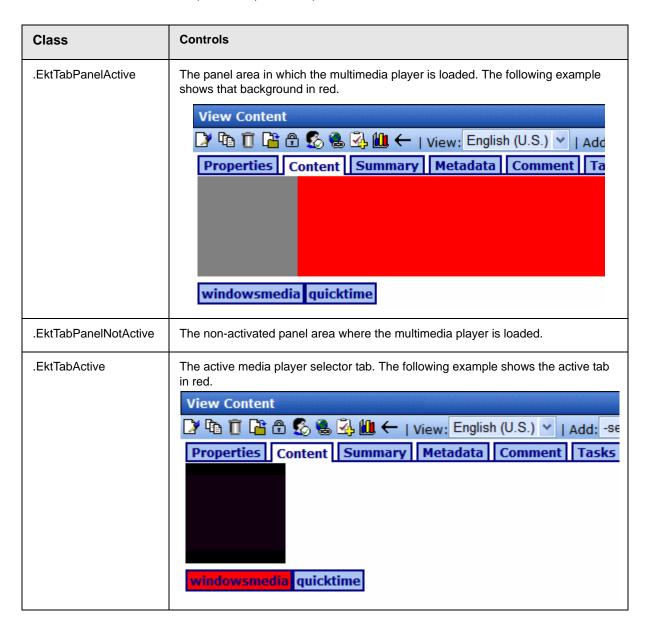
#### NOTE

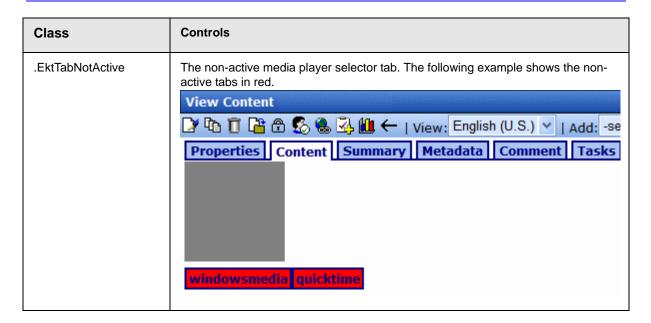
Calendars that appear on a Web page use the CalendarStyles.css style sheet, which is installed by default to the  $\sine$  root $\sine$ Workarea $\cite{loot}$ Csslib directory. This style sheet is described in the Developer Manual section "Introduction to Server Controls" > "Calendar Server Control" > "Calendar Style Sheet".

#### EktTabs.css

The EktTabs.css file is used to define the tabs used in the Multimedia section of the Workarea. This file's default location is  ${\scriptstyle \setminus}$ 

\siteroot\Workarea\csslib.





#### worksearch.css

This file is located in webroot/CMS400Demo/Workarea/csslib. It is used to customize the look of the Workarea search results.

## **Workarea Styles.css**

The styles.css file is located in webroot/CMS400Demo/Workarea. It is a general style sheet provided for creating a new Web application project.

## com.ektron.rules.wizard.css

This file is located in webroot/CMS400Demo/Workarea/businessrules/css. It is used to customize the look of the Business Rules module in the Workarea.

## com.ektron.utils.wizard.css

This file is located in webroot/CMS400Demo/Workarea/businessrules/css. It is used to customize the look of the View Business Rule pop-up screen in the Workarea.

## **Ektron Explorer**

The following files are used to customize the look of the Ektron Explorer. These files are located in webroot/CMS400Demo/Workarea/explorer/css.

- com.ektron.ui.contextmenu.css
- com.ektron.ui.explorer.css
- com.ektron.ui.folderbrowser.css
- com.ektron.ui.iconlist.css
- com.ektron.ui.local.css
- com.ektron.ui.logutil.css
- com.ektron.ui.menu.css
- com.ektron.ui.radiobox.css
- com.ektron.ui.search.css
- com.ektron.ui.tabdialog.css
- com.ektron.ui.tabs.css
- com.ektron.ui.tree.css

#### ektnormal.css

This file is located in webroot/CMS400Demo/Workarea/ewebeditpro. It is used to customize the xml editor. The style sheet must be assigned to the folder containing the content.

#### ektdata.css

This file is located in webroot/CMS400Demo/Workarea/ewebeditpro. It is used to customize the Workarea's Data Designer. The style sheet must be assigned to the folder containing the content.

# **Images**

#### Application Images

To change the look **Ektron CMS400.NET** via a logo, you must change two images.

- Workarea\_logo.gif the logo of the application. It presently displays the Ektron CMS400.NET logo. It lives under \Workarea\images\application directory.
  - By changing this image, the application can be branded to display any other graphic or logo. You must use the same size attributes of 155 pixels wide by 77 pixels high. Alternate size attributes will cause the application to look wrong.
- navigation\_edit.gif. This also resides in the application folder.
   This image is used for the left bar in the edit content, edit metadata, edit summary, and add content Workareas. This image can also be changed but must retain the same size attributes of 128 pixels wide by 500 pixels high.

A third image, **Workarea\_back.gif**, makes up the blue/gray background at the top of the Workarea. The size attributes are 50 pixels wide by 77 pixels high. This image cannot be less than 50 pixels wide as Netscape and Firefox do not repeat it correctly.

#### Language Images

Several language specific Images are used at the top of the Workarea. They reside in the language folders and always start with the word "Workarea" and end with "top."

These images are 467 pixels wide by 77 pixels high. Their width can change but the height cannot.

There are approximately six images in each language folder. an Adobe Photoshop file, Workarea\_top.psd, can be found under \workarea\images\English folder. You can modify these images as needed.

# Converting CMS300 to Ektron CMS400.NET

Many customers who purchase **Ektron CMS400.NET** are upgrading from Ektron CMS300. Converting Ektron CMS300 to **Ektron CMS400.NET** is explained in the following sections:

- "Step 1: Back Up Your Site and Database" on page 192
- "Step 2: Install New Ektron CMS400.NET" on page 193
- "Step 3: Migrate Your CMS300 Database For Use with Ektron CMS400.NET" on page 194
- "Step 4: Copy Folders and Files" on page 196
- "Step 5: Set Folder Permissions" on page 197
- "Step 6: Update Files" on page 198
- "Step 7: Create an IIS Application For Your Site" on page 201
- "Step 8: Make dmdata an IIS Application" on page 204
- "Step 9: Add Ektron CMS400.NET License Keys" on page 205
- "Step 10: Verify Installation" on page 206

NOTE

For more information on upgrading your site to **Ektron CMS400.NET**, see "Migrating Your Site to Ektron CMS400.NET" on page 207.

## Step 1: Back Up Your Site and Database

Before starting any migration or upgrade process, you should always back up your site and database.

#### **Best Practices**

Ektron recommends running the migration procedure on a separate copy of the production database or in a staging/development environment.

#### WARNING!

This is a very important step! It should not be skipped! If you do not back up your database and convert to **Ektron CMS400.NET**, you will not have a way to go back to using your database in CMS300 if there is a problem. Also, there are file changes that need to be made. If you do not back up your site, you will have to undo each change manually.

## **Backing Up Your Site**

You can back up your site files as you would any other group of files. You can copy them to a different location or use software to back them up to a tape drive or CD.

## **Backing Up Your Database**

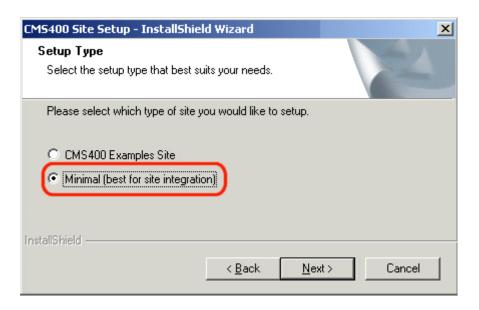
The steps for performing a backup on a Microsoft SQL database are explained in "Backing Up Databases" on page 38. If you have another type of database, such as mySQL, Oracle or Access, you can use the backup procedures provided with the software.

# Step 2: Install New Ektron CMS400.NET

Install the latest version of **Ektron CMS400.NET** with platform support. This procedure is explained in "Installing Ektron CMS400.NET" on page 73.

As explained in "Performing the Installation" on page 74, the installation involves copying files to your server then setting up a sample site. While setting up the site, follow these instructions.

- When asked to insert your license keys, ignore the screen.
   (You will insert your license keys in "Step 9: Add Ektron CMS400.NET License Keys" on page 205.)
- When asked to choose a site type, select Minimal.



 Say no to the database install. You will upgrade the CMS300 database for use with CMS400.

# Step 3: Migrate Your CMS300 Database For Use with Ektron CMS400.NET

#### NOTE

Ektron CMS400.NET requires a physical installation of the product. If you do not have physical access to the machine, someone with access to the machine must run the install. For more information, see "Installing Ektron CMS400.NET" on page 73.

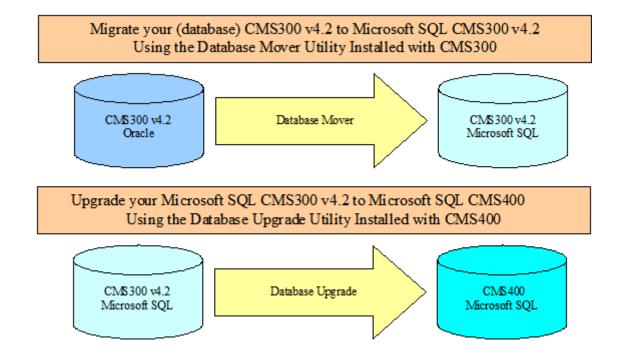
Your database must satisfy the following criteria before you can use it with Ektron CMS400.NET. It needs to

- be a Microsoft SQL database
- be the same CMS version
- have ASPNET or IIS\_WPG (if you are using Microsoft Windows 2003) user access to your database if you are using a trusted connection

This should be done in the following order.

- 1. "Migrate Database to Microsoft SQL" on page 195.
- 2. "Upgrade Database to Ektron CMS400.NET" on page 196.
- "Adding Database Permission for ASPNET or IIS\_WPG users" on page 196.

The following image shows the database migration path. This example uses CMS300 v4.2 going to the latest **Ektron CMS400.NET** version.



## Migrate Database to Microsoft SQL

You must migrate your database in the same CMS it currently resides in. For example, if you are using CMS300 and have an Oracle database, you need to upgrade to Microsoft SQL in CMS300. You can migrate your database to Microsoft SQL from the following programs:

- Microsoft Access
- Oracle

#### MySQL

You can migrate your database to Microsoft SQL by using the Database Mover program. To do this, click **Start > Programs > Ektron > CMS300 > Utilities > Database Mover**.

## **Upgrade Database to Ektron CMS400.NET**

Upgrade your Microsoft SQL database from Ektron CMS300 to Ektron CMS400.NET. If your Ektron CMS300 version number matches the Ektron CMS400.NET version number, you do not need to perform this step.

To upgrade, use the Database Upgrade program installed with Ektron CMS400.NET. To do this, click **Start > Programs > Ektron > CMS400 > Utilities > Database Upgrade**.

## Adding Database Permission for ASPNET or IIS\_WPG users

After upgrading the database to the latest version of **Ektron CMS400.NET**, you need to add permission for either the ASPNET or IIS\_WPG users to the database. Use the ASPNET user if you are using a Microsoft Windows 2000 or Windows XP Professional Server. Use the IIS\_WPG user if you are using a Microsoft Windows 2003 Server.

# Step 4: Copy Folders and Files

Copy the following folders and files to your CMS300 site webroot. For example, if you installed the CMS400min site and are using the CMS300Sample site as your site, copy the folders and files from the CMS400min site to C:\Inetpub\wwwroot\CMS300Sample.

- The c:\inetpub\wwwroot\cms400min\workarea folder, including all subfolders
- The C:\inetpub\wwwroot\cms400min\bin folder
- The c:\inetpub\wwwroot\cms400min\App\_Code folder, including all subfolders
- The C:\Inetpub\wwwroot\CMS400min\AssetManagement folder, including all subfolders
- The C:\inetpub\wwwroot\cms400min\Assets folder

- C:\inetpub\wwwroot\cms400min\web.config
- C:\inetpub\wwwroot\cms400min\assetmanagement.config

# Step 5: Set Folder Permissions

The following folders in the site root need to have either the ASPNET user or IIS\_WPG user added with the appropriate permissions. The IIS\_WPG user is for Microsoft Windows Server 2003 only. In addition, the dmdata folder needs the EKT\_ASSET\_USER added.

The table below contains Folder, User and Permission settings information.

Folder	User	Permission
uploaded images	ASPNET User or IIS_WPG (Windows Server 2003 only)	<ul><li>Read</li><li>Write</li><li>Modify</li></ul>
uploadedfiles	ASPNET User or IIS_WPG (Windows Server 2003 only)	<ul><li>Read</li><li>Write</li><li>Modify</li></ul>
dmdata	ASPNET User or IIS_WPG (Windows Server 2003 only)	<ul><li>Read</li><li>Write</li><li>Delete sub folders and files</li></ul>
dmdata	EKT_ASSET_USER	• Write
Assets	ASPNET User or IIS_WPG (Windows Server 2003 only)	<ul><li>Read</li><li>Write</li></ul>

# Step 6: Update Files

The following files have information in them that need to be updated.

- "Web.config" on page 198 Everyone needs to update this file.
- "AssetManagement.config" on page 199 Everyone needs to update this file.
- "site\_scripts\_path.asp" on page 199 need updating if you are using ASP pages.
- "applicationAPI.asp" on page 199 need updating if you are using ASP pages.
- "site\_scripts\_path.php" on page 200 need updating if you are using PHP pages.
- "applicationAPI.php" on page 200 need updating if you are using PHP pages.
- "PHP Templates" on page 201 need updating if you are using PHP pages.
- "Application.cfm" on page 201 needs to be completed if you are using ColdFusion pages.

### Web.config

The settings in the web.config file equate to the settings in the CMS300 setup.xxx files. Update the following Web.config file settings to reflect your current database, site location, and WSpath.

Setting	How to Change
ConnectionString	ek_dbcatalog, ek_dbusername and ek_dbpassword are no longer used. Update the information between the <connectionstring> tags to point to your:  server database user pwd</connectionstring>

Setting	How to Change		
ek_sitepath	Change the site path to your site's webroot. For example: /CMS300Sample/		
WSpath	Change the web service path. For example: http://localhost/CMS400min/Workarea/ ServerControlWS.asmx		
	Becomes http://localhost/CMS300sample/Workarea/ ServerControlWS.asmx		

## AssetManagement.config

The domain needs to be changed from localhost to your domain. For example:

DomainName="localhost"

#### becomes

DomainName="www.MyEktronsite.com"

## site\_scripts\_path.asp

Update the path to the applicationAPI.asp file. For example:

<!-- #include virtual="/cms300sample/cms300scripts/applicationAPI.asp" -->

#### becomes

<!-- #include virtual="/cms300sample/Workarea/platforms/asp/
applicationAPI.asp" -->

## applicationAPI.asp

Update the WSDLpath to new location of your Web services file. Update the CMS400 Workarea to the new location of the Workarea folder. For example:

WSDLpath = "http://localhost/cms400demo/WorkArea/WebServices/
ContentWS.asmx"

#### becomes

```
WSDLpath = "http://www.MyEktronSite.com/WorkArea/WebServices/
ContentWS.asmx"
```

#### and

CMS400WorkareaPath = "/cms400demo/WorkArea/"

#### becomes

workareaPath = "/www.MyEktronSite.com/WorkArea/"

## site\_scripts\_path.php

Update the path to the applicationAPI.php file. For example:

<?php include\_once 'cms300scripts\applicationAPI.php'; ?>

#### becomes

<?php #include\_once 'Workarea\platforms\asp\applicationAPI.php'; ?>

## applicationAPI.php

Update the WSDLpath to new location of your Web services file. Update the CMS400 Workarea to the new location of the Workarea folder. For example:

```
$WSDLpath = "http://localhost/cms400demo/WorkArea/WebServices/
ContentWS.asmx?WSDL";
```

#### becomes

\$WSDLpath = "http://www.MyEktronSite.com/WorkArea/WebServices/ ContentWS.asmx?WSDL"

#### and

\$workareaPath = "/cms400demo/WorkArea/";

#### becomes

\$workareaPath = "/www.MyEktronSite.com/WorkArea/";

### **PHP Templates**

When upgrading your Ektron CMS300 to Ektron CMS400.NET, add the following line between the head tags for each template.

**IMPORTANT!** 

This only needs to be done if you are upgrading from CMS300 to CMS400.NET

<meta http-equiv="Content-type" content="text/html; charset=utf-8" />

### Application.cfm

#### Copy the settings in the

\workarea\platforms\coldfusion\application.cfm file into the application.cfm file in the root of your site. These settings supersede and replace current CMS300 settings and includes.

Alter the application.wsdlpath and application.workarea values inside the application.cfm file to reflect the correct URL of your CMS site.

# Step 7: Create an IIS Application For Your Site

Perform this only if your site is not in your server's webroot, or if your Web site is not already set up as an IIS application

**Ektron CMS400.NET** must be an IIS application to run properly.

To see if your Web site is running as an IIS application, go to your server's Computer Management Console and view the Internet Information Services section. Use the following table to determine if your Web site is running as an IIS application.

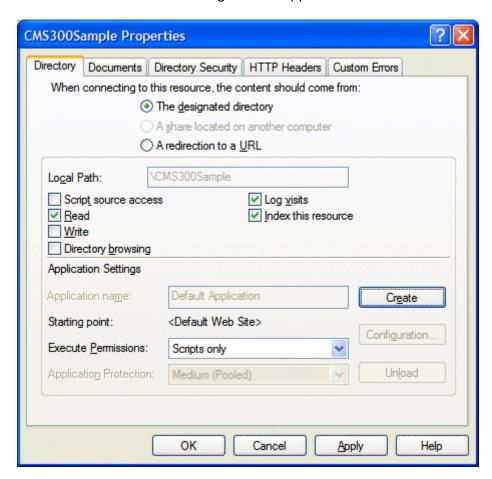
Microsoft Windows Version	Icon Next to Your Site Name In IIS	Web Site running as an IIS Application?
2003 Server	***	Yes
XP Professional	\$	Yes

Microsoft Windows Version	Icon Next to Your Site Name In IIS	Web Site running as an IIS Application?		
Any		No		

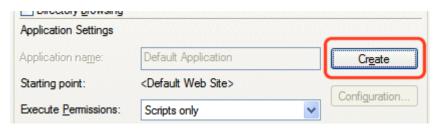
If an IIS application needs to be created for your Web site, follow these steps.

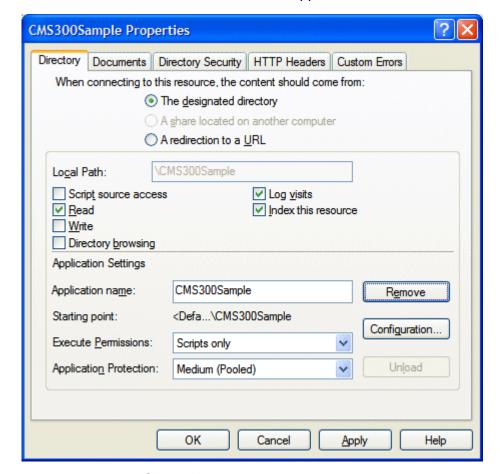
- Click Start > Control Panel > Administrative Tools > Console Management
- In the left pane of the console, click Services and Applications > Internet Information Services > Web Sites > Default Web Site

3. Right click your Web site and select **properties**. The following window appears.



4. Click the Create button





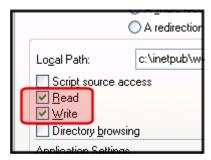
5. Your site is now an IIS application

6. Click OK.

# Step 8: Make dmdata an IIS Application

- Click Start > Control Panel > Administrative Tools > Console Management
- In the left pane of the console, click Services and Applications > Internet Information Services > Web Sites > Default Web Site > Asset Management > dmdata
- 3. Right click your Web site and select properties.

4. Make sure that **Read** and **Write** are checked.



- 5. Click the Create button.
- 6. Click the **Directory Security** tab.
- 7. In the **Anonymous access and authentication** field click the **Edit** button.
- 8. Uncheck Anonymous Access.
- 9. Uncheck Integrated Windows Authentication.
- 10. Check Basic Authentication.
- 11. Click **OK**.
- 12. On the **ASP.NET** tab select a 2.0 version of ASP.NET.
- 13. Click **OK**.

# Step 9: Add Ektron CMS400.NET License Keys

You need to add your CMS400 license keys to the database. You can use the builtin account to accomplish this. The builtin account's username is **builtin** and password is **builtin**.

#### WARNING!

You should only use the builtin account temporarily. As soon as possible, insert the license key and log in under a user name assigned in Ektron CMS400.NET.

Below are the steps for adding license keys to **Ektron CMS400.NET**.

- 1. Navigate to your Web site's Ektron CMS400.NET login page.
- 2. Click Login.
- 3. Use the username **builtin** and the password **builtin**.
- 4. Click Workarea.
- 5. Click **Settings** > **Configuration** > **Setup**.

- 6. Click the **Edit** button ().
- 7. Insert your license key and any module keys.
- 8. Click the **Update** button ( ).

# Step 10: Verify Installation

When first attempting to use the platform support, you may get a timeout message as the Web services bridge is established for the first time. If this occurs, wait several seconds and then refresh the page or navigate to another page. Once the connection is established, you will notice a speed improvement over the old platform support in CMS300.

# Migrating Your Site to Ektron CMS400.NET

This chapter explains how to migrate your Web site to Ektron CMS400.NET. This chapter explains

- What to copy to your Web site
- Setting up and deploying templates

This chapter assumes you installed Ektron CMS400.NET and have read the Ektron CMS400.NET Administrator Manual so that you have an understanding of basic concepts, some of which are mentioned here.

# **Initial Steps**

The following section describes tasks you need to perform before migrating your Web site.

### Installation

Ektron CMS400.NET requires a physical installation of the product. If you do not have physical access to the machine, someone with access to the machine must run the install.

For more information, see "Installing Ektron CMS400.NET" on page 73.

### Verify Installation

After you install Ektron CMS400.NET, verify that it is properly installed by using the sample site. By default, the sample Web site is located at the following address on the machine to which Ektron CMS400 NET is installed

http://localhost/cms400demo/default.aspx

If you can browse the sample site and it works properly, **Ektron CMS400.NET** is properly installed.

#### **Best Practices**

Ektron recommends keeping a working version of the sample site. This can be used to help you debug problems.

For instance, if you encounter errors on your site, you can refer to the sample site to see if the same errors occur. If they do, that may indicate a problem with the installation. If they do not, the installation is probably OK and an external factor is causing the problem.

# Setting up Your New Site

#### NOTE

You can use the Site Setup utility to perform these tasks. To launch this utility, go to **Start > Programs > Ektron > CMS400 > Utilities > Site Setup**. To read about it, go to "Setting up a Site" on page 81.

### **Copy Application Core Files**

Copy the application core files from the cms400demo/workarea folder into your site's folder. These files operate the workarea, library, and content functions.

### Set up the Database

Since the content is stored in a database, you need to create one. To learn how to set up a database, see "Setting up a Database" on page 91.

### **Modify Application Parameters**

After you install and create the Ektron CMS400.NET database, modify the web.config file that installed to the directory to which you installed **Ektron CMS400.NET**.

Edit that file and modify the following settings

Setting	Type in
ek_dbDatabase	The type of database you are using.

Setting	Type in
ek_dbUsername/ ek_dbPassword	The username and password, if your database requires one.
ek_sitePath	The relative path from Web root to the scripts folder.

#### NOTE

If you are using SSL, the settings you need to modify are explained in "Configuring SSL" on page 158.

# Creating a Login Page

Now that everything is set up, you can create a login page. You can either copy the one from the sample site or create your own.

A list of the content tags can be found in the Ektron CMS400.NET Developer's Reference Manual.

### Log In

To log into your Ektron CMS400.NET Web site, follow these steps.

- 1. Browse to the login page you created and click the **Login** button.
- 2. A login dialog box opens asking for a username and password.
- 3. Enter the default username (admin) and password (admin) and click Login.
- 4. You are logged into Ektron CMS400.NET

#### NOTE

If you get a message that the application is locked, log in using the username and password **builtin/builtin**. You get the message if your license key is invalid or has not been entered yet.

# Modifying Configuration Settings

After you log in, access the Workarea by clicking on the Workarea button. From there, you can modify the configuration settings.

### **Set up Active Directory**

If plan to use Active Directory, configure this now. The settings for Active Directory can be found in the **Settings > Configuration** folder. Refer to "Active Directory Integration" in the Administrator Manual.

### **Modify the Setup Screen**

The Ektron CMS400.NET setup section is located under the **Settings > Configuration** folder. The setup section allows you to configure items such as your license key, style sheet support, max content size, and default language.

See 'Configuring Ektron CMS400" in the Administrator manual for more information.

### Set up Metadata

Ektron CMS400.NET includes extensive metadata support. Settings for metadata definitions can be found under the **Settings** > **Configuration** folder in the Workarea. You can have as many metadata definitions as needed.

See "Metadata" in the Administrator manual for more information.

### **Set up Smart Forms**

You can also set up your Smart Forms. You create XML files externally or via the Data Designer. Next, a Smart Form is assigned to content blocks and folders.

See "Managing XML" in the Ektron CMS400.NET Administrator Manual for additional information.

# Creating Ektron CMS400.NET Users

If you are not using Active Directory support, add your users manually. The maximum number of users is determined by your license key. For instance, if you purchase a 10-user license, you can enter 10 users.

#### NOTE

If you exceed the licensed number of users, you may get locked out of Ektron CMS400.NET.

Every user must belong to a group. When you first add a user, he or she is automatically added to the Everyone group. You can create more user groups and add users to them as desired.

For more information, see "Managing Users & User Groups" in the Administrator manual.

# Configuring Content and Forms Folders

Next, create folders to organize content blocks and forms. Create as many folders as you want. Each folder level can go as deep as you want.

#### **Best Practices**

Keep your folder structure simple so it's easy for your users to navigate. Organize folders in a way that makes sense to the users who will navigate through them. So, you may have 6 or so top level folders, and each folder may go 4 or so deep.

This folder structure is replicated under the Library folder.

As you create folders, you can assign a default template and style sheet. The default template is used when a new content block is created and Ektron CMS400.NET creates a Quicklink that points to the new content block. If you do not provide a default template, it is inherited from the parent folder.

After creating the folders, assign permissions and workflow to them. Permissions can be assigned to a user or a user group. The same is true for the approval process.

#### **Best Practices**

Limit permissions for the "Everyone" group, as this gives every user permissions to that content. Similarly, you should limit the "Everyone" group's inclusion in the approval chain if you want to restrict which users can publish content.

# **Creating your Templates**

Now you can create your templates. Templates contain the look and feel of the site. Masthead, navigation, and footer graphics are all part of the template. Use server controls to insert **Ektron CMS400.NET** content into a template. A list of server controls is in the Developer's Manual.

#### **Best Practices**

Since dynamic templates include URL parameters, make each main landing page and other important pages static tags. This makes it easier for you to remember if you need to provide that link to someone. For instance, each main landing page from your home page could use the static tag. Then, as you go deeper into that section, subsequent pages use a dynamic tag.

# Migrating/Creating Content

At this point, you can begin to create/migrate your content. If you are migrating content from an existing site, add a new content block, and cut and paste the content into the Ektron CMS400.NET editor.

NOTE

All images and files must be uploaded and inserted into the content separately.

# **Deployment**

Deployment from development to production is as simple as moving the files over. To properly deploy your new Ektron CMS400.NET Web site, following these steps.

- 1. Copy all assets (templates, images, files, etc.) from your development box to your production machine.
- 2. Move the database. You have two choices
- point your data source on the production machine to the database you were using
- copy the database, move it to your production box, and point a data source to that

### **Advanced Features**

The previous information allows you to create a basic Ektron CMS400.NET Web site from scratch. This section explains some advanced features that you may implement, although they are not needed for the Web site to function properly.

### **Email Notification**

For email notification to work in Ektron CMS400.NET, make sure the SMTP service is setup and running in IIS, and that it points to a valid mail server.

Refer to "Configuring E-Mail Notifications for Tasks and Content Workflow" on page 135 for additional information.

#### Other

Other items, such as Load Balancing, can be configured in Ektron CMS400.NET. Please see the special features section of the Administrator Manual for more information.

# **Macintosh Editor License**

#### **IMPORTANT!**

For additional information on using the Apple Macintosh as a client, see the User Manual section "Macintosh Support for Ektron CMS400.NET Clients"

# The Integrated Macintosh Editor License

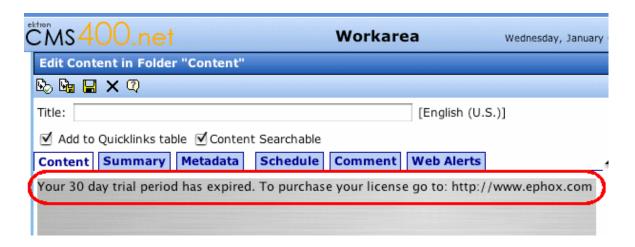
When using a Macintosh, an additional separate license is needed for the Integrated Macintosh Editor (IME). This editor only works when using the Safari browser.

The first time you edit content on an Apple Macintosh, the Integrated Macintosh Editor is installed. With the installation, there is a thirty day trial license. After the trial license expires, you must purchase a full license.

The license for the IME is purchased through Ektron. Contact Ektron licensing for more information on purchasing a license.

#### **IMPORTANT!**

If you see the following message, please contact Ektron licensing for a license key. Do *not* contact Ephox -- they cannot provide a license.



# Adding the Integrated Macintosh Editor License to Ektron CMS400.NET

When you add the license for the Integrated Macintosh Editor (IME), you add it to the Ektron CMS400.NET server where your site is hosted. This might be a production or development server depending on your business model.

The following steps explain how to add the IME license to Ektron CMS400.NET.

- 1. Copy the **editlive.lic** file that you were sent when you requested a full license.
- 2. On the Ektron CMS400.NET server, navigate to the following location and paste the **editlive.lic** file.

C:\Inetpub\wwwroot\cms400demo\Workarea\ewebeditpro\editlivejava

3. Click **Yes**, when the server asks if you want to overwrite the existing file.

Macintosh users should now be able to edit content using the IME in the Safari browser.

# **Additional Information**

### **Supporting Documents**

You can find more detailed information about Ektron CMS400.NET in the following documents:

- Ektron CMS400.NET Administrator Manual, Version 6.1 for .NET 2.0
- Ektron CMS400.NET Developers Reference Manual, Version 6.1 for .NET 2.0
- Ektron CMS400.NET User Manual, Version 6.1 for .NET 2.0

# Support

If you are experiencing trouble with any aspect of Ektron CMS400.NET, please contact the Ektron Support Team via our Web Site, or by e-mail:

support@ektron.com

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

### Sales

For questions and answers about purchasing Ektron CMS400.NET from Ektron, contact the sales department by sending an e-mail to:

sales@ektron.com